BMW GROUP AND THE FUTURE OF SUSTAINABLE (E)-MOBILITY.
LATIN AMERICA CLEAN TRANSPORT FORUM.
LEADERSHIP DRIVEN BY ASPIRATIONAL BRAND PORTFOLIO AND HIGHLY EMOTIONAL PRODUCTS.
TWO PARALLEL PATHS OF SUSTAINABLE INDIVIDUAL MOBILITY.

**EVOLUTION**
- Efficient combustion engines
- Innovative technologies

**REVOLUTION**
- Alternative drive trains
- Mobility services
THE BMW i3 AND THE BMW i8 UNDER THE BRAND BMW i.

**BMW i3**
City Vehicle  
Battery Electric Vehicle (BEV)  
Optional: Range Extender

**BMW i8**
Sports car  
2+(2) Seater  
Plug-In Hybrid Electric Vehicle

Visionary Mobility.  
Inspiring Design.  
Next Premium.

„Short distance drives“  
„Long distance drives“
BMW i.
A HOLISTIC APPROACH.
0-100 km/h in 7.3 s
Curb Weight: 1.245 kg
Top Speed: 150 km/h
Turning Circle: 9.86 m
Range (everyday use): 200 km (94 Ah)
Direct benefits of the electric car can be experienced by customers and are delivered easily.
AND WE ARE PARTICIPATING IN THAT GROWTH!

Each 36th car worldwide sold is a BMW
AND WE ARE PARTICIPATING IN THAT GROWTH!

Each 36th car worldwide sold is a BMW

Each 8th electric car sold worldwide is a BMW i
INCENTIVES HAVE A STRONG EFFECT ON EV MARKET SHARE. THOUGH NOT ALL MARKETS ARE AFFECTED EQUALLY.

Subsidies and EV* Market Share of Newly Registered Vehicles in 2015

Sources: OECD/IEA, ACEA, SMAVA, KAMA, JAMA, CATARC, ICCT

*EV = BEV, PHEV, EREV, FCEV

Norway
• From €10,000 to around €17,000 in tax reduction incentives.
• Electricity supply rate reductions for EV charging.
• Widely available free parking, toll, and ferry cost exemptions.

France
• Bonus of up to €10,000 purchase incentive if you exchange a diesel vehicle.
• Malus for high CO2 emission vehicles.
• Circulation tax exemption and lower electricity costs.

China
• Between €5,400 and €9,000 in subsidies.
• Some access to vehicle restricted areas.
• Much better chance of getting registration and license plate in the lottery system (some cities).

California
• $10,000 with state and federal funding.
• HOV Lane use, free parking, and lower electricity rates. HOV use was cited as strong incentive.
• Funding may not be available in the near future.
FRAMEWORK CLASSIFICATION FOR ELECTRIC VEHICLE INCENTIVES.

**Monetary Incentives**
Direct financial incentives For EV owners
- Purchase incentive for electric vehicles.
- Reduction / waiver of registration and/or circulation tax.
- Reduction / waiver of consumption tax.
- Company car incentive.
- Subsidy for the installation wall-box.

**Non-Monetary Incentives**
Qualitative and indirect support for EV usage
- Use of privileged lanes (e.g. bus or car sharing lane).
- Exclusive parking for electric vehicles; free parking and/or free charging
- Preferential treatment for inner city toll systems.
- Exemption from congestion charges.

**Framework Conditions**
Measures to support the environment for EVs
- Public charging infrastructure.
- Awareness due to public demonstration and research projects.
- Public initiatives and cooperations supporting the uptake of EVs.
- Public procurement programs for EV fleets.

€6,300
€15,000
€5,500
€10,000
€4,000
€9,000
DECISION FACTORS FOR ELECTRIC VEHICLE PURCHASE IN CALIFORNIA.
TOP MOTIVATORS.

Top three motivators for purchase:
- Nissan Leaf: 38%
- Chevrolet Volt: 34%
- Toyota Prius Plug-in Hybrid: 57%

Importance of CVRP rebate:
- Extremely important: 31%
- Very important: 8%
- Moderately important: 25%
- Slightly important: 2%
- Not at all important: 34%

59% said having HOV lane access was extremely or very important in their decision to purchase a PEV.

84% are displaying an HOV sticker on their vehicle.

Source: California Plug-in Electric Vehicle Driver Survey.
INTRODUCTION OF BMW i IN THE AMERICAS.

<table>
<thead>
<tr>
<th>Year</th>
<th>Country(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>Brazil, Canada, Mexico, USA</td>
</tr>
<tr>
<td>2015</td>
<td>Chile, Colombia</td>
</tr>
<tr>
<td>2016</td>
<td>Costa Rica, Panama</td>
</tr>
</tbody>
</table>
## EV INCENTIVES - SELECTED MARKETS IN LATIN AMERICA.

<table>
<thead>
<tr>
<th></th>
<th>BRAZIL</th>
<th>CHILE</th>
<th>COLOMBIA</th>
<th>C. RICA</th>
<th>MEXICO</th>
<th>PANAMA</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Monetary and Tax Incentives</strong></td>
<td>NO</td>
<td>NO</td>
<td>NO LUXURY TAX (Below $50,000 FOB)</td>
<td>YES 13% VAT</td>
<td>YES Exempt: new vehicle &amp; ownership tax</td>
<td>NO</td>
</tr>
<tr>
<td><strong>Import Incentives</strong></td>
<td>YES REDUCTION ON IMPORTATION TAXES</td>
<td>NO</td>
<td>YES NO IMPORT DUTIES QUOTA</td>
<td>YES NO IMPORT DUTIES</td>
<td>NO</td>
<td>YES NO IMPORT DUTIES</td>
</tr>
<tr>
<td><strong>Infrastructure Incentives</strong></td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
</tr>
<tr>
<td><strong>Electricity Incentives</strong></td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>Preferential TARIFF</td>
<td>NO</td>
</tr>
<tr>
<td><strong>Vehicle use Limitations For Non Electric Vehicles</strong></td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
</tr>
</tbody>
</table>
CHARGENOW STRATEGY. > 12,000 CHARGEPOINTS IN 8 MARKETS.

<table>
<thead>
<tr>
<th>TOTAL STATIONS</th>
<th>Charge now/ BMW partners</th>
</tr>
</thead>
<tbody>
<tr>
<td>CA</td>
<td>3,982/489</td>
</tr>
<tr>
<td>US</td>
<td>14,407/9,716</td>
</tr>
<tr>
<td>MX</td>
<td>180/65</td>
</tr>
<tr>
<td>BR</td>
<td>67/47</td>
</tr>
<tr>
<td>CA</td>
<td>18/3</td>
</tr>
<tr>
<td>US</td>
<td>3/5</td>
</tr>
<tr>
<td>MX</td>
<td>5/12</td>
</tr>
<tr>
<td>BR</td>
<td>2/0</td>
</tr>
</tbody>
</table>
BMW do Brasil Plan:
Identify motivated partners to install free public charging station on key spots in main Brazilian cities. BMW pays for installation and parking spot visual.

Premium supermarket:
Installed 10 Wall boxes for Public Charging.

Premium malls
Installed 3 Wallboxes. Plan to install additional 4 stations.

Gas stations:
Installed 1 Wallbox for Public Charging. Plan to install additional 49 stations nationwide.
BMW i - PUBLIC CHARGING EXAMPLES IN CHILE.
BMW i – PUBLIC CHARGING EXAMPLES COLOMBIA.
BMW i – PUBLIC CHARGING EXAMPLES COSTA RICA.
**BMW i – PUBLIC CHARGING EXAMPLES IN MEXICO.**

<table>
<thead>
<tr>
<th>BMW Public Charging:</th>
<th>POI</th>
</tr>
</thead>
<tbody>
<tr>
<td>+40 Public Charging stations</td>
<td>• Shopping centers</td>
</tr>
<tr>
<td>+20 Dealer Charging Stations</td>
<td>• Universities</td>
</tr>
<tr>
<td>ChargeNow Network and Webpage</td>
<td>• Street charging</td>
</tr>
<tr>
<td></td>
<td>• Commercial partners</td>
</tr>
<tr>
<td></td>
<td>• Government</td>
</tr>
</tbody>
</table>
Four main policy areas where governments in Latin America should focus attention on promoting EV uptake:

✓ Expand pilot programs for high-use electric vehicles, which have significant environmental benefits while demonstrating the effectiveness of EV technology to build public confidence.

✓ Introduce stronger financial incentives, such as tax reductions for EVs and home charging infrastructure purchases, to reduce high up-front costs and make EVs more competitive with conventional vehicles.

✓ Increase non-financial incentives, such as access to preferential parking and driving lanes, and strengthen fuel economy standards to give car manufacturers incentives to invest in EV technology.

✓ Include EVs in broader long-term plans for the energy and transport sectors and introduce EV targets in climate change mitigation goals.
THANK YOU VERY MUCH.