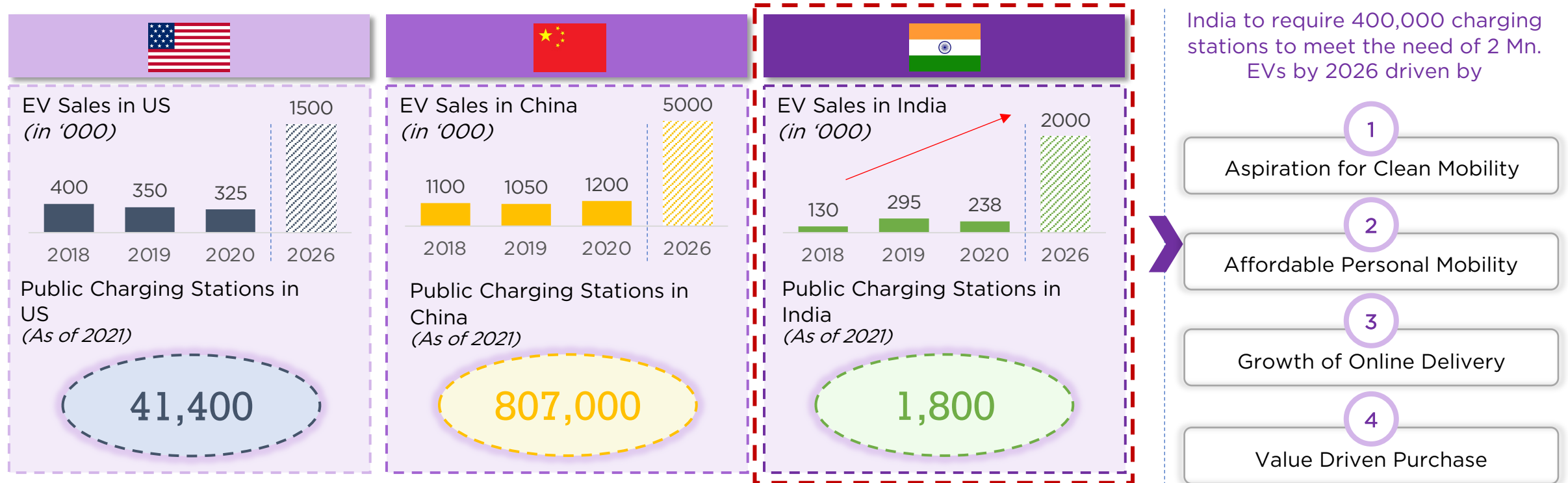


The Electric Vehicle charging market size in India is expected to surpass USD 5 Bn. by 2027 propelled by the large underserved market, rapidly growing EV adoption and lower competitive intensity



### Business Models Around the Globe

Independent Networks

Auto Manufacturer Networks

Malls, Restaurants &amp; Hotels

Fuelling Stations

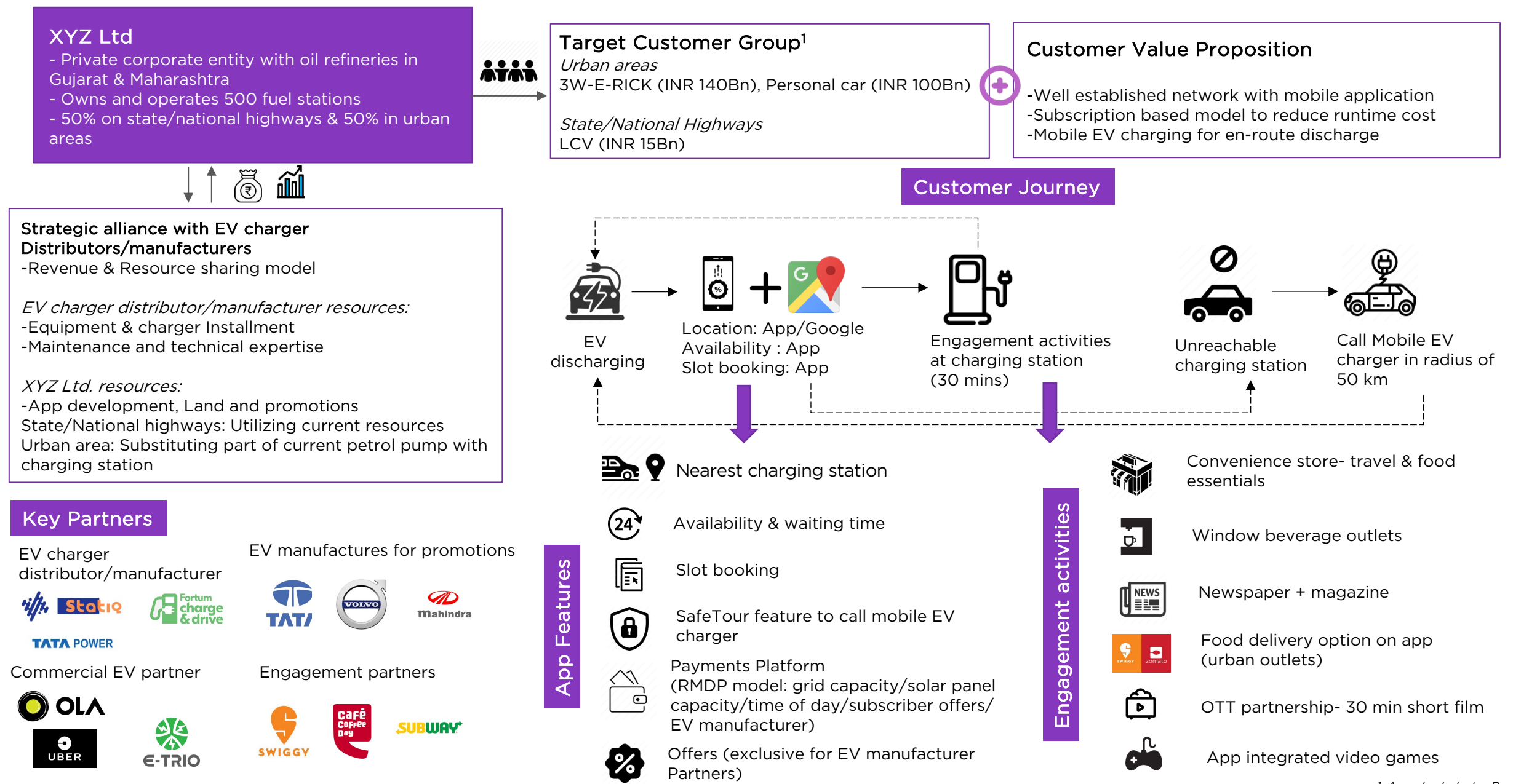
Sharing Economy

Mobile Charging Units

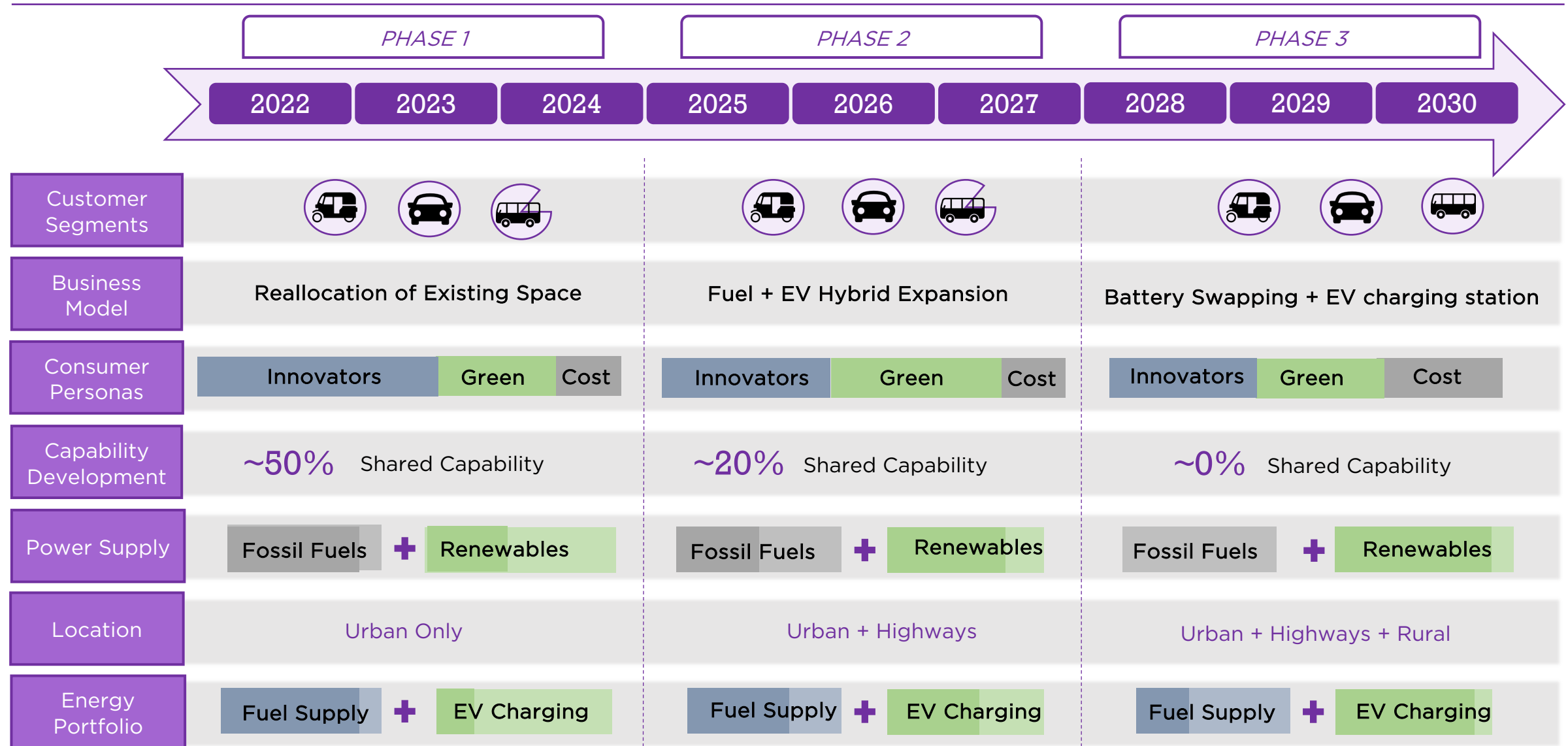
### Major Competitors in India



















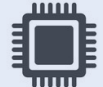
Enhancing customer value by leveraging strategic partnerships with existing EV related infra network owners



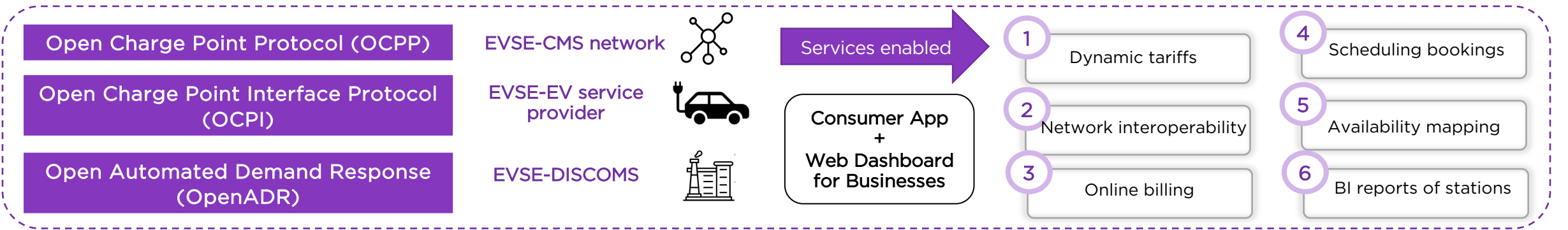
Company's business model is expected to evolve in three phases to develop capacity in time to meet the demand of the Indian Government's resolution of increasing the share of EVs to 30% by 2030



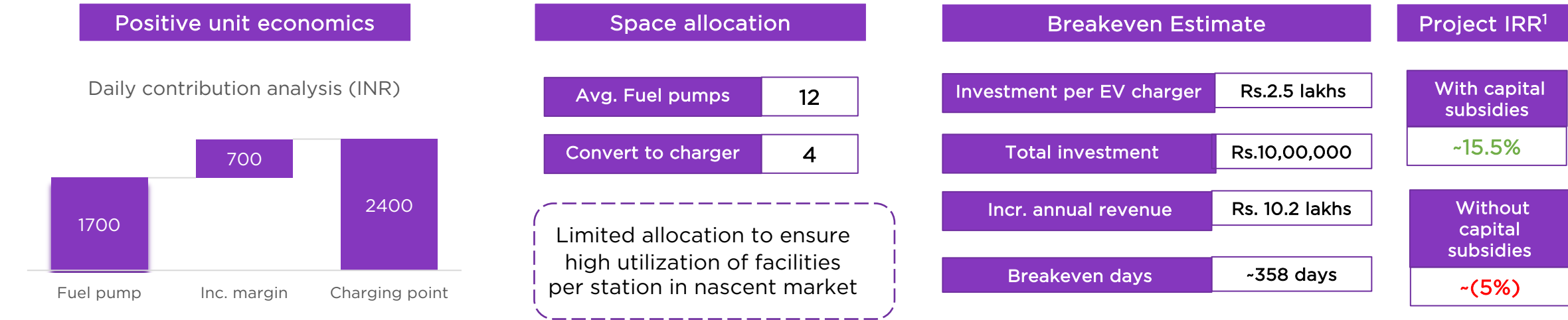
# Using communication protocols to address bottlenecks across EV charging infrastructure enhancing value creation for all stakeholders

Design element	Stakeholders	Key challenges	Solutions
<div>1</div> <div></div> <div>Power source</div>	<div>DISCOMs</div> <div>State govts</div>	High coal mix (~75%) in grid power	<div>Net metering: Solar to balance energy portfolio</div> <div>    </div> <div>Solar panelIn-station batterySmart meter to monitor grid &amp; solar use</div>
<div>2</div> <div></div> <div>Transmission grid</div>	<div>Central govt</div> <div>State govts</div>	Demand volatility Transmission constraints HT infra concentration	<div>Active load management</div> <div> Variable charging Speed*  Dynamic pricing</div> <div>Passive load management</div> <div> Time of day pricing (static)</div>
<div>3</div> <div></div> <div>EVSE</div>	<div>Equipment partners</div>	Charging point compatibility Capable for CMS services	<div>Multi-charging points</div> <div>  </div> <div>CHAdemo Combo 2 Type 2</div> <div>Smart connectivity</div> <div>  </div> <div>CloudEV</div>

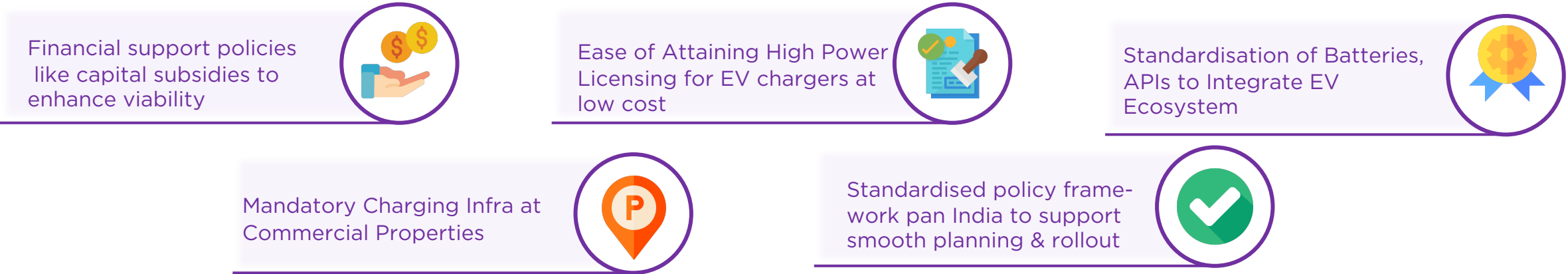
## Communication protocols: Bridge to smart charging



# Healthy unit economics offers short path to breakeven equipment capex; subsidies critical for overall project viability



## Policy Recommendations to Steer the Indian EV Charging Industry



Conclusion: : XYZ Ltd should focus on VISION 2030– Adoption of EV charging solutions to drive carbon neutrality and developing a future ready product mix

