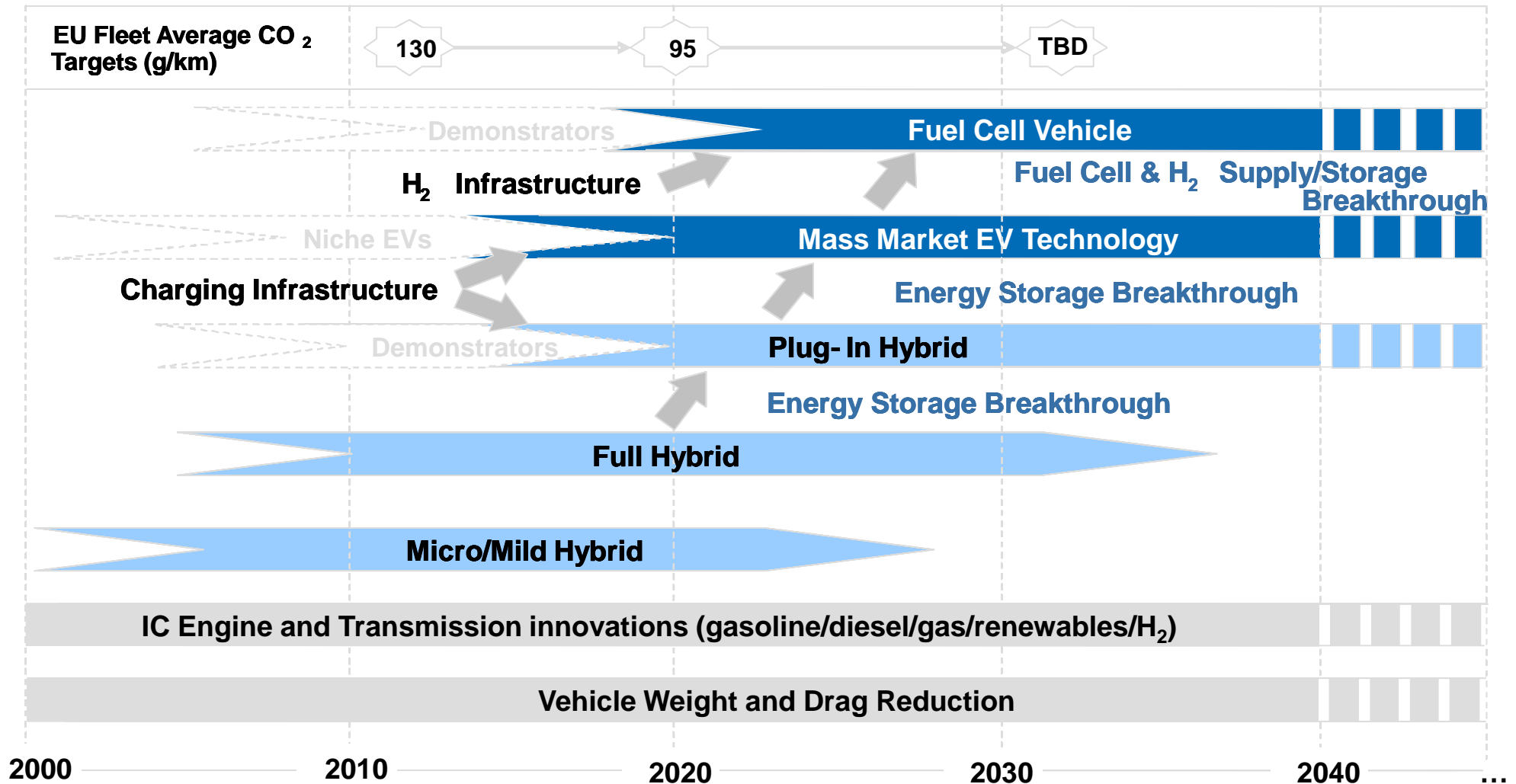


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Key Points related to the OEM Consensus Roadmap

- OEMs share a common product technology roadmap and recognise the same technical and commercial barriers.
- Individual manufacturers will implement technologies which best address their own brand values and market sectors.
- In the near to medium term, improvement of conventional powertrains and transmissions can have a significant impact on fleet average CO₂ by providing moderate benefits for a large proportion of the fleet.
- In the medium to longer term it is anticipated that a technology shift to alternative powertrains and transmissions will be required to achieve the CO₂ reduction targets from transport. Supported by alternative fuel delivery including grid electricity and hydrogen.
- Both electrification and fuel cell vehicle technologies rely on the concurrent development of a “clean and sustainable” supply of energy