

# Orlen introduction

*E-mobility*

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# ORLEN introduction

*Orlen is the international player with dominant role in Czech Republic*



- 7 countries in Middle and East Europe
- More than 3000 Filling Stations in operation

- The biggest retail network in Czech republic (439 Filling Stations)
- 25% market share
- The only one oil processing company in Czech republic

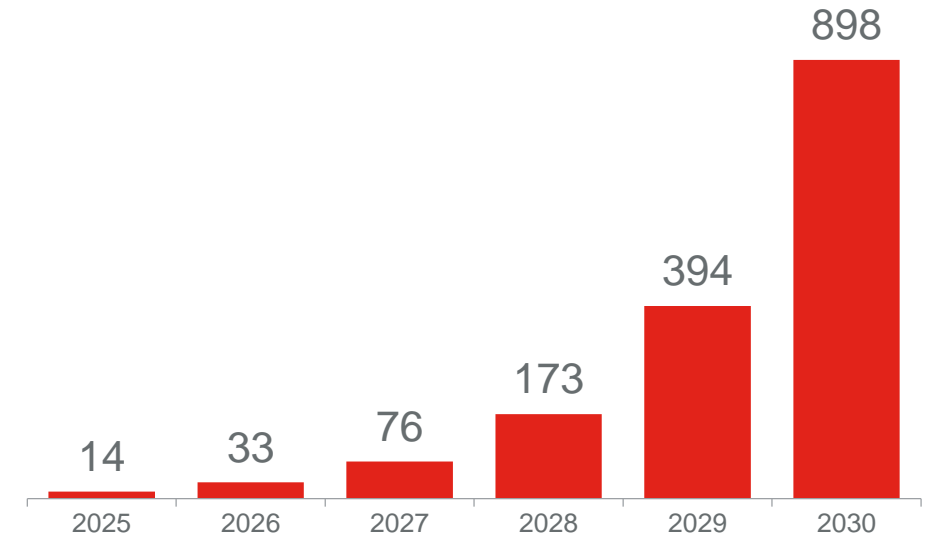
- The dominant role still play standard fuels
- But we are as well active in LPG, CNG, Hydrogen, HVO and newly in electromobility

# Strategy Direction

Both global and local strategies are already targeting massive e-chargers growth



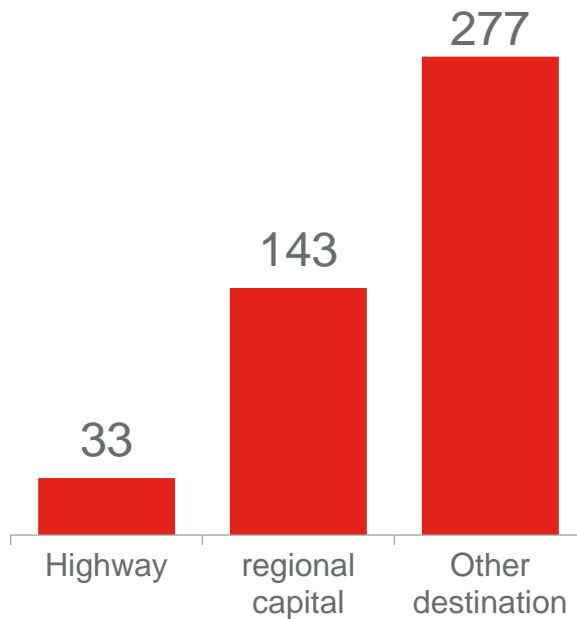
## Target for CZ (# chargers)



# Locality selection

*We have pipeline of top 150 locations for chargers development*

## Filling stations



- Revision of 439 Orlen Filling Stations
- Mapping of local situation
- Requests for connection from distributors
- Setting of technical standards
- Review subsidy conditions



## Targeting top 150 locations

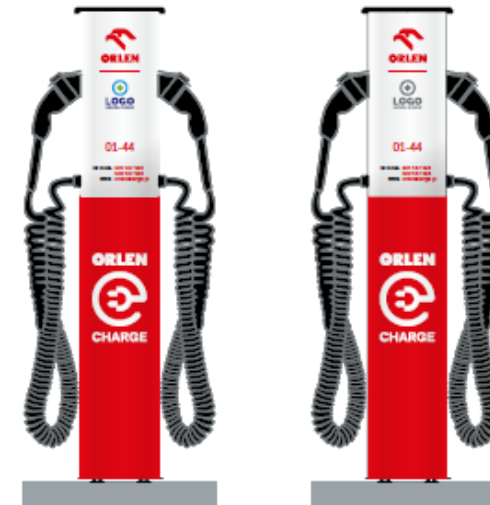


# Charging station standard

*We are building standardized solution for our locations*

## Our solution for high speed charging

- Minimum 4 charging point per locality
- For Highway minimum 6 charging points
- Potential future extension
- At least 150kW per charging point
- Request for connection from distributors from 600kW





# Concrete projects

*We are leveraging European and national subsidy calls*

**Several development stages split by subsidy calls**

## CEF # 8 locations

- Subsidy granted
- Feasibility study done
- Running project documentation for building permit

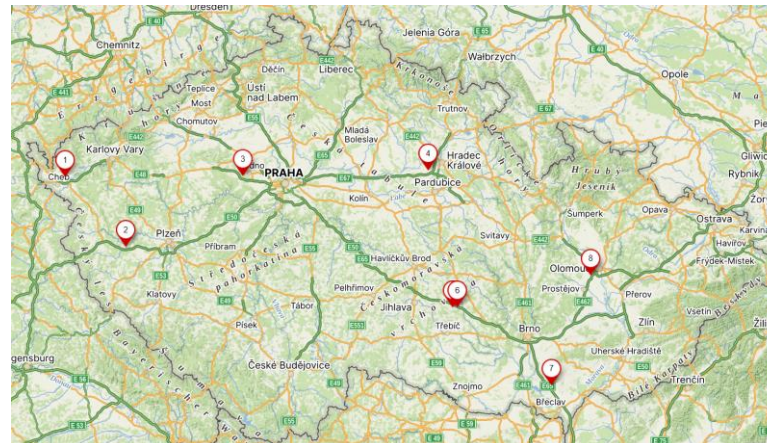
## Call 13 # 22 locations

- Subsidy granted
- Running Feasibility study

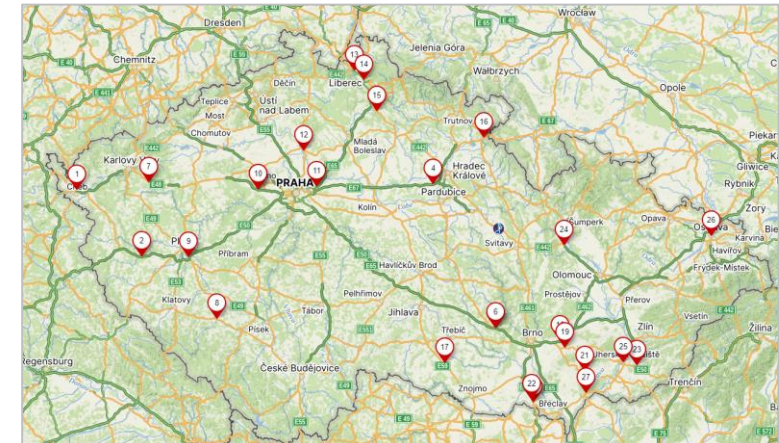
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- Preparing another location to apply for subsidy
- Review another subsidy calls that will be opened

## CEF II



## Call 13



# CEF update

*Not any significant barrier till now*

## Locality update

Osice	Cheb	Kladruby	Velká dobrá	Starovičky	Žerůvky	Devět Křížů 1	Devět Křížů 2
- Finalizing agreement with ŘSD and State land office - During December send to Building office	- <b>Got building permit</b>	- <b>Got building permit</b> - Finalizing agreement for easement	- New route for connection to high voltage grid - Finalizing agreement for easement and ŘSD	- Easement with ŘSD for transformer station	- New route for connection to high voltage grid - Finalizing agreement for easement and ŘSD	- changes in project due to requests from traffic police - Extension to ŘSD land > extension in renting agreement	- changes in project due to requests from traffic police - Extension to ŘSD land > extension in renting agreement

- Not any significant barrier till now
- Long negotiation of easement for grid connection and ŘSD

## HW (charging station) tender

The organization of tender is designed in following steps:

- Open tender: **4.9.2024**
- Submissions of bids: **31. 10. 2024**
- Formal evaluation: **ongoing / to be done 20th of December**
- **Selection of 3 vendors for physical tests: until end of January 2025**
- **Signing of contracts: February 2025**

# New development plan

*We are working on standards for future e-mobility projects across Orlen Group*

## Technical standards

- Roofing
- Approach angles
- Cabling
- Future extension
- ...

## PHV + Battery storage

- Pilots on roofs of current building
- Identified 30 locations with nearby free space
- Solving for refinery decarbo limits
- Solving for grid capacity barrier

## Heavy duty charging

- Initial goal is provide all services on current Orlen locations
- High investment intensity
- Very risky because of initial stage of whole heavy duty market



# ORLEN Hydrogen plan

*Based on the market change we have to validate our approach*

## »»» Hydrogen plans of ORLEN Group by 2030



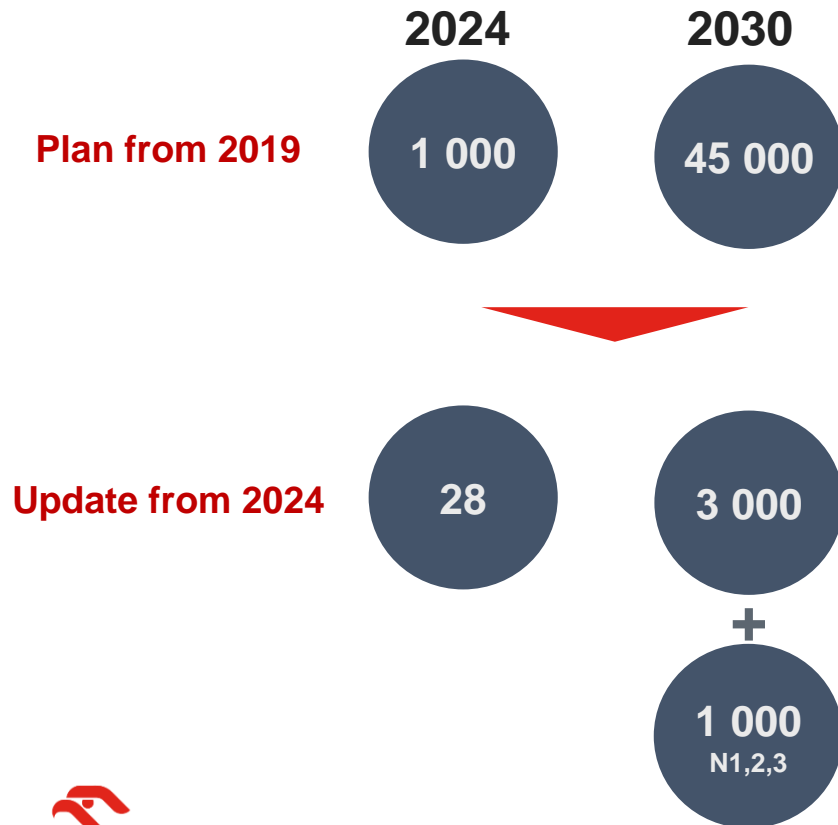
- We have long term plan but the market is not developing as quickly as expected
- We have to revise the roadmap till 2030

ORLEN Benzina hydrogen stations as a part of ORLEN Group strategy

# ČR Hydrogen strategy

*The updated prediction of H2 cars is 10x lower then was plan 5 years ago*

## National Action plan – prediction of H2 cars



## Subsidy Programs

H2 Filling station	H2 Cars
<ul style="list-style-type: none"><li>Investment subsidy</li><li>Orlen applied for another 3+2 locations</li></ul>	<ul style="list-style-type: none"><li>No subsidy for personal usage</li><li>Several programs for Companies Public, Logistic &gt; generally for green transport not for Hydrogen</li></ul>
<ul style="list-style-type: none"><li>We are the only who is operating public Hydrogen station</li><li>There is 28 Hydrogen cars in Czech Republic</li><li>It do not seems that hydrogen passenger cars will be used massively but still the place can be for heavy vehicles and busses</li><li>We are in contact with several towns but generally the interest went down</li></ul>	