



ELECTRIC MOBILITY CANADA

ACCELERATING ELECTRIC
TRANSPORTATION

2018

ANNUAL REPORT

TABLE OF CONTENTS

4	ABOUT EMC
6	CANADIAN EV LANDSCAPE
8	EV2018VÉ
10	FEDERAL ADVOCACY
12	PROVINCIAL ADVOCACY
14	EV HIGHLIGHTS ACROSS CANADA

LET'S KEEP GOING AND GROWING A MESSAGE FROM OUR PRESIDENT AND CEO



2018 was a year marked by important changes and growth of electric vehicle (EV) sales and EMC itself. After four years of leading EMC, Chantal Guimont retired. Under her guidance, EMC achieved international recognition. In addition to hosting the largest international EV conference — the Electric Vehicle Symposium — in 2016, EMC's annual conference and trade show continued to grow, attracting foreign delegations. In fact, EV2018VÉ was the strongest conference and trade show to date.

After chairing the board of directors since 2013, in 2018 I stepped into the role of President and CEO to ensure a solid transition to Chantal's permanent successor. While replacing Chantal, I came into greater contact with EMC members from across the country and gained an even greater understanding of the activities of the growing number of stakeholders in the Canadian electromobility value chain. The energy and dynamism that I am seeing is greater than anything I have witnessed to this point.

In 2018, Canadian EV sales continued to grow. There are now over 93,000 EVs in Canada (an increase in sales of 125% compared to 2017). EMC's membership

also grew, reaching new highs. To better serve the needs of this growing membership, we hired Nicolas Coutlée, your new Coordinator of Member Services.

2019 will be an even stronger year where EMC will be delivering more value to the growing membership: more advocacy at the federal and provincial levels, more member consultations leading to policy development as well as greater learning and networking opportunities at our expanding conferences and chapter meetings.

The search for Chantal's permanent successor not being completed, the EMC Board has asked Al Cormier, EMC's founder, to return as Interim President & CEO. And, I return to the position of Chair of the Board.

I look forward to seeing all of you at EMC's tenth annual conference and trade show, EV2019VÉ, in picturesque Québec City from May 6th to 9th 2019.

Catherine Kargas
Vice President, MARCON
Interim President & CEO, Electric Mobility Canada

EMC: A KEY ROLE AND A UNITING FORCE A MESSAGE FROM OUR CHAIR



The past year has seen the continued mainstreaming of electric mobility, and we at EMC have much to be proud of as we look back at our contributions to building momentum in Canada.

We continue to be recognized at all levels of government as a balanced, representative, and respected voice on policy. Our 2018 lobbying efforts included: continued involvement in developing a national zero emissions vehicle (ZEV) strategy to be released in 2019, consultation on the forthcoming federal clean fuel standard, 2019 federal budget recommendations, and continued engagement with provincial governments across the country.

We are bringing together EV players from across the economy in a number of ways. With our most successful integrated e-mobility conference yet in 2018, EV/VÉ has firmly established itself as Canada's premier EV event. Our newly launched EV Canadian Industry Directory is making new collaborations possible by listing nearly 250 companies, vehicle manufacturers, consultants, testing and research centres, non-profit organizations, and more.

With all of this activity and growing recognition of EVs as the future of mobility, it is no surprise

that we too are growing. In December, EMC announced its first regional chapter in Alberta.

We continue to seek ways to sustainably accomplish EMC's mission with the broader EV value chain. It is EMC's role as the united voice to seek alignment and work collaboratively with all industry and levels of government.

As we look forward to 2019, I would like to thank Chantal Guimont, who after four years of leading and growing EMC as President & CEO, began a well-deserved retirement in 2018. Stepping into the role of Interim President & CEO, Catherine Kargas has continued to grow and build on success. I also extend an enormous thanks to EMC members, and to my Board colleagues for volunteering their valuable time, knowledge, and expertise to support the association and its important mission to influence, engage, and promote electric mobility in Canada.

Heather Ferguson
Vice President - New Business Ventures,
Ontario Power Generation
Chair, EMC Board of Directors

ABOUT ELECTRIC MOBILITY CANADA

Electric Mobility Canada is the only national organization dedicated exclusively to accelerating the electrification of all modes of transportation, and represents the complete value chain of this growing industry.

OUR VISION

Electric mobility* is the preferred choice across all Canadian provinces & territories.

* This includes battery electric vehicles (BEVs), plug-in hybrid electric vehicles (PHEVs), and fuel cell electric vehicles (FCEVs).

OUR MISSION

To strategically accelerate the transition to electric mobility across Canada.

ELECTRIC MOBILITY CANADA'S MEMBERSHIP IN NUMBERS

178

Members in 7 provinces

40

New Members in 2018

59

Corporate Members

16

Academic Institutions

11

Fleet Managers

14

Energy Providers

In 2018, EMC saw a 15% increase in membership, surpassing our prior record set in 2017.

15 EV DRIVER ASSOCIATIONS ARE NOW PART OF EMC.

LIST OF EMC BOARD MEMBERS

Executive Committee

Chair: Catherine Kargas, Marcon

Vice Chair: France Lampron, Hydro-Québec

Secretary-Treasurer: Dan Guatto, Burlington Hydro

DIRECTORS

Industry

George Bousioutis – Kia Canada

Marlene Chamandy – Ford Motor Company of Canada

Travis Allan – AddÉnergie Technologies/FLO

Matt Stevens – FleetCarma

Energy Providers

Heather Ferguson – Ontario Power Generation

Diane Robichaud – NB Power

Neetika Sathe – Alectra inc.

Alec Tsang – B.C. Hydro

Fleet Managers

Serge Carignan – ATUQ

Not-for-Profit Organizations and Academics

David Corbeil – AVÉQ

Ian Klesmer – The Atmospheric Fund

Wilf Steimle – EV Society

THE CANADIAN EV LANDSCAPE IN 2018

In the U.S., 361,307 plug-in vehicles were sold in 2018, 81% more than in 2017.

In comparison, Canada's market grew by 125% in 2018.

Data from InsideEVs.

93,091

Electric Cars on the Road in Canada

8,913

Public Level 2 and DC Fast Charging Ports

YT
3 EVs

NT
8 EVs

NU
1 EV

BC

17,175 EVs
1,000–2,000 L2 charging ports
100–250 DC fast charging stations
Rebate of up to: \$11,000

AB

2,078 EVs
100–250 L2 charging ports
25–50 DC fast charging stations

MB

381 EVs
100–250 L2 charging ports
1–10 DC fast charging stations

SK

190 EVs
50–100 L2 charging ports

ON

34,052 EVs
2,000–3,000 L2 charging ports
500–1,000 DC fast charging stations

QC

38,737 EVs
3,000–5,000 L2 charging ports
250–500 DC fast charging stations
Rebate of up to: \$8,000

NL

39 EVs
25–50 L2 charging ports

PE

29 EVs
25–50 L2 charging ports

NS

223 EVs
50–100 L2 charging ports
10–25 DC fast charging stations

NB

175 EVs
100–250 L2 charging ports
25–50 DC fast charging stations

DATA PROVIDED BY



As of December 31, 2018
Detailed data available upon request

EV2018VÉ: SIMPLY THE BEST

For its 9th edition, EV2018VÉ clearly established itself as the must-attend electromobility event in Canada; for many, this year was the most valuable EV/VE conference since its creation in 2009.



From April 24 to 27, 2018, EMC held its annual Conference and Trade Show in Ottawa, Ontario. With over 400 delegates, 70 speakers, 18 technical sessions, and a sold-out trade show, EV2018VÉ was a triumph.

Thanks to its proximity to Parliament Hill, EV2018VÉ attracted members of Parliament from all parties, including Minister of Environment and Climate Change, Catherine McKenna, to a special Ride N' Drive event on the Hill.

Politicians, delegates, the media, and the general public had the opportunity to test drive 7 EV models for a total of 175 test drives over two days. Also, let's not forget the 40 foot Proterra Catalyst 100% electric bus that was available to delegates, with the founder of Proterra himself as the bus driver!

Electric Mobility Canada would like to thank Ontario Power Generation, all levels of government, the sponsors, and the participants that contributed to making EV2018VÉ a huge success.

“ The EV/VE Conference and Trade Show is simply the best in North America in terms of quality of the content presented and overall organization.”

– ALEXANDRE LOUIS, Vice President – Sales, AddÉnergie



FEDERAL ADVOCACY

As a national entity, EMC works with all stakeholders to accelerate the transition to electromobility and prompt Canada to step forward with policies and regulations that support this industry, signalling to the world that Canada is open for EV-related investments. In the last year, we have ramped up our lobbying efforts at the federal level. With the help of our newly hired lobbyist, EMC focused on two key policy areas: a Zero-Emissions Vehicle (ZEV) Strategy and a Clean Fuel Standard.

OUR FOCUS IN 2018

After contributing significantly in the Government of Canada's ZEV national strategy consultations in 2017, EMC invested heavily in federal advocacy activities in 2018. Multiple meetings were undertaken with Transport Canada, with Natural Resources Canada, with Innovation, Science and Economic Development, with Environment and Climate Change Canada as well as with the Office of the Prime Minister.

EMC presented a **strong 2018 pre-budget submission** that can be reviewed on our website. This submission encouraged the federal government to invest in purchase incentives for EVs, a GST exemption for EVs as well as investment in education to help Canadians understand the benefits of EVs all while eliminating EV myths.

In 2018, EMC undertook an exhaustive consultation of members to develop a policy proposal related to the Clean Fuel Standard. This work will lead to the recognition of electricity as a clean fuel, generating much-needed credits for the industry stakeholders contributing to the accelerated adoption of electromobility across Canada.

LOOKING FORWARD TO 2019

Although the Government of Canada did not release a ZEV strategy in 2018, we remain optimistic as we enter an election year that the federal government will deliver a strategy that recognizes the important contribution of transportation to GHG emissions.

In the upcoming year, EMC intends on continuing its advocacy activities, underlining the importance of the federal government adopting the measures contained in the pre-budget submission. We will keep you informed of EMC's activities and consultations as well as the final version of the Clean Fuel Standard.





PROVINCIAL ADVOCACY

2018 was a busy year on the provincial scene: B.C. made a huge commitment to electromobility with a series of tangible and bold measures; Ontario and Quebec elected two new governments and EMC promptly approached them, and we inaugurated a brand-new chapter in Alberta.

BRITISH COLUMBIA

In December 2018, the B.C. government announced that it will be introducing a **ZEV standard** in the spring to phase in targets for the sale of zero-emission vehicles with the intent that by 2040, every new car sold in B.C. will be a zero-emission vehicle, as part of the **CleanBC strategy**.

As stated in **our press release**, EMC will be working with the B.C. government to ensure that the standard is balanced with demand-stimulating measures educating and encouraging the province's residents to make the switch to EVs. At the same time, EMC initiated efforts to help create a B.C. EV industry cluster. This cluster has started to be formed and much more will be undertaken in 2019.

Finally, BC Hydro, in collaboration with B.C. government, Fortis BC (3 EMC members) and with support from Natural Resources Canada, has grown the fast charging network in B.C. to cover 7 highway routes, enabling 3000km of EV driving.

ONTARIO

Following the election of the new Ontario government, the EV and charging financial incentives program was cancelled. On July 17, 2018, EMC established the Ontario Government Relations Committee to raise government awareness of EMC's mission and promote the benefits of electrified transportation in Ontario, with the broader perspective of obtaining provincial support for electrified transportation. The Committee has developed into one of the most active committees at EMC, and its members have come together with enthusiastic participation and contributions that are a much-needed unified voice to government.

In early October, introductory letters were sent to Minister of Finance, Minister of Environment, Conservation and Parks, Minister of Economic Development, Minister of Health, Infrastructure Ontario, and the Premier's Office. Through the help of a dedicated Ontario lobbyist, EMC has had the honour of representing its members at 9 follow-up meetings with Ontario MPPs and government staff in advance of the release of the **Ontario Environment Plan**.

The Plan provides a pathway to meet the Canadian international target of a 30% reduction in GHG emissions against the 2005 base year by 2030, in line with the Paris Agreement commitments. Under the Plan, "Clean Fuels" and "Low Carbon Vehicles Uptake" are expected to make the first and third largest contributions to emission reductions by 2030, respectively.

EMC is optimistic that its work through this committee will play a key role in the shift of policy and programs that support the wishes of our members in Ontario.

QUÉBEC

Throughout 2018, EMC remained active in Québec, collaborating with the Québec government as well as other provincial stakeholders.

With the election of a new government, EMC has communicated with the Ministers of Transport, Environment and Fight against Climate Change, Economy and Innovation, and Energy and Natural Resources, and has already met with politicians in the newly formed government. We look forward to working with Premier Legault, Minister Bonnardel, Minister Charette, Minister Fitzgibbon, and Minister Julien in communicating the message of the growing Québec membership.

As EV2019VÉ congress is set to take place in Québec City this spring, we will collaborate closely with the Québec government to make the event a success.

REGIONAL CHAPTERS

The addition of a new chapter in Alberta proves that EMC truly seeks to represent all the stakeholders in the country. Along with the chapters in British Columbia, Nova Scotia, Ontario, and Québec, these regional meetings are invaluable in helping to identify local challenges, keep our advocacy action plan up-to-date and help members grow.

EMC would like to thank the hosts of the 9 chapter meetings in 2018.

EV HIGHLIGHTS ACROSS CANADA



LAVAL BECOMES THE FIRST CITY TO OFFER EV SUBSIDIES

The City of Laval launched a rebate program for the purchase of electric vehicles in 2018. Residents are eligible for a \$2,000 financial incentive for the purchase of a 100% electric car and for \$400 off electric bicycles. As of October, 2018, 163 requests had been made for the electric car rebate and 221 for electric bicycles. Although this type of allocation is widespread in Europe, it is a unique initiative for a Canadian municipality.



NOVA SCOTIA'S ELECTRIC VEHICLE FAST-CHARGING NETWORK

Nova Scotia Power unveiled Nova Scotia's first EV fast-charging network with the installation of 12 Level 3 chargers by AddÉnergie from Yarmouth to Sydney, making it a more viable option to travel across the province with ease. This network addresses the lack of high-speed charging stations, which is a primary inhibitor to Nova Scotians adopting EVs. The initiative will also enable NS Power to study the effects of EV fast chargers on the power system.



FIRST ROAMING AGREEMENT IN NORTH AMERICA

In October, FLO and ChargePoint announced a roaming partnership that provides EV drivers across North America a seamless charging experience. FLO and ChargePoint clients can now effortlessly access more than 33,000 public chargers on both networks while travelling in the US and Canada, without the need to register for multiple accounts or incur additional fees.



Photo: Hydro-Québec

RATE-BASED DEPLOYMENT FOR DCFC STATIONS IN QUÉBEC

In June 2018, the Québec's National Assembly unanimously adopted an Act to promote the establishment of a public fast-charging service for electric vehicles. The new legislation authorizes Hydro-Québec to use revenue from the increase in electricity sales generated by charges carried out primarily at electric vehicle drivers' homes to fund the installation of more fast-charge stations. Electricity rates will therefore not be affected.



A NEW EV CHARGING STATION FACTORY IN ONTARIO

In March, Ontario's first charging station factory opened in Markham, Ontario. Gleb Nikiforov, CEO of Autochargers.ca, a national company that supplies equipment for electric vehicles and EMC's member, said the plant aims to manufacture 40,000 charging stations a year, starting in 2019, which will create 100 jobs over the next three years. The new plant has the capacity to manufacture 60,000 charging stations a year.



B.C. CHARGING SOLUTIONS & INCENTIVE PROGRAM

B.C. launched the Charging Solutions & Incentive Program supporting home, multi-unit residential building (MURB), and workplace charging. The ~\$1.9M program has been very successful, supporting around 800 charging stations to-date. Due to high demand, the home rebates were fully allocated within 4-months of program launch, and workplace and MURB incentives are currently waitlisted. Advisory support continues; a valuable service for residents and strata councils exploring charging options.



EV CANADIAN INDUSTRY DIRECTORY

Last Spring, EMC unveiled its online EV Canadian Industry Directory gathering close to 250 companies, research centres, educational institutions, media, and non-profit organizations, in the field of electric mobility, and alternative fuel vehicles. This constantly updated online tool will help EMC members to navigate the growing EV community and find potential business partners and clients. You can find the directory in the Members Only section of our website.



EMC WHITE PAPERS AND WEBINARS

EMC started its white paper series with a piece on the necessity to subsidize EVs and plan to cover in 2019 a growing number of topics to arm our members with easy-to-understand data in order to debunk misleading claims and myths. Also, EMC continued its webinar series with speakers from Retrie Technologies, Natural Resources Canada, and MITACS.

Thanks to all our members
for their ongoing support!



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