



Global Sales Meeting

June 2022

BU-E / Bender / eMobility Sales Strategy

Mario Lehr

Agenda



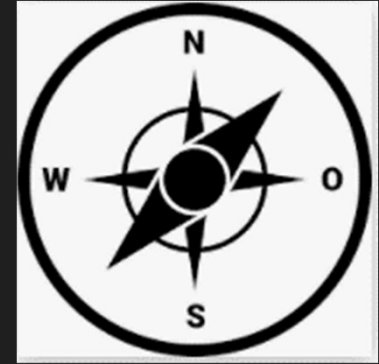
General strategic sales setup – eMobility components



Our range of support from HQ



Sales strategy DC Charging Components & iONiX



Focus Topic 1

General strategic sales setup – eMobility components

- **Structure of Sales Channels**
 - Direct business from HQ and BU-E sales in Germany
 - Sales of components via BGMs
 - Sales of components via REPs
- **Main market is EU with 95% of total eMobility sales (IEC region)**
- **Our products have gained a significant market share**
 - AC Sensors (6mA RCMB/RDC) = 60-70% share for Mode 2/3 incl. VAC
 - DC Sensors (IMDs) = 40-50% at DC fast chargers
 - Vehicle Sensors (IMDs) = <20% for special vehicles, OEM less, but licenses
 - Smart Charging (CC/ICC) = <5%

Business Review – Thanks for what we achieved so far



65,975 Electric Vehicles monitored by Bender IMDs
(+8,224)
Plus **778,049** delivered IMDs & BMS by HELLA
(+410,014)*

Vehicle Sensors Bender IMDs → + 12,000
Licensed IMDs & BMS by HELLA → + 1,000,000

1,599,249 A/C charging stations monitored by Bender RCM sensors
(+783,827)
Plus **2,85 Mio** direct delivered RCMs by VAC
(+1,460,622)*

RCMB/RDC Sensors Bender → + 1,400,000
Licensed RCMB/RDCs by VAC → + 4,200,000

FC
2022**

DC Charging IMDs → + 40,000

30,360 DC charging IMDs
(+12,121)

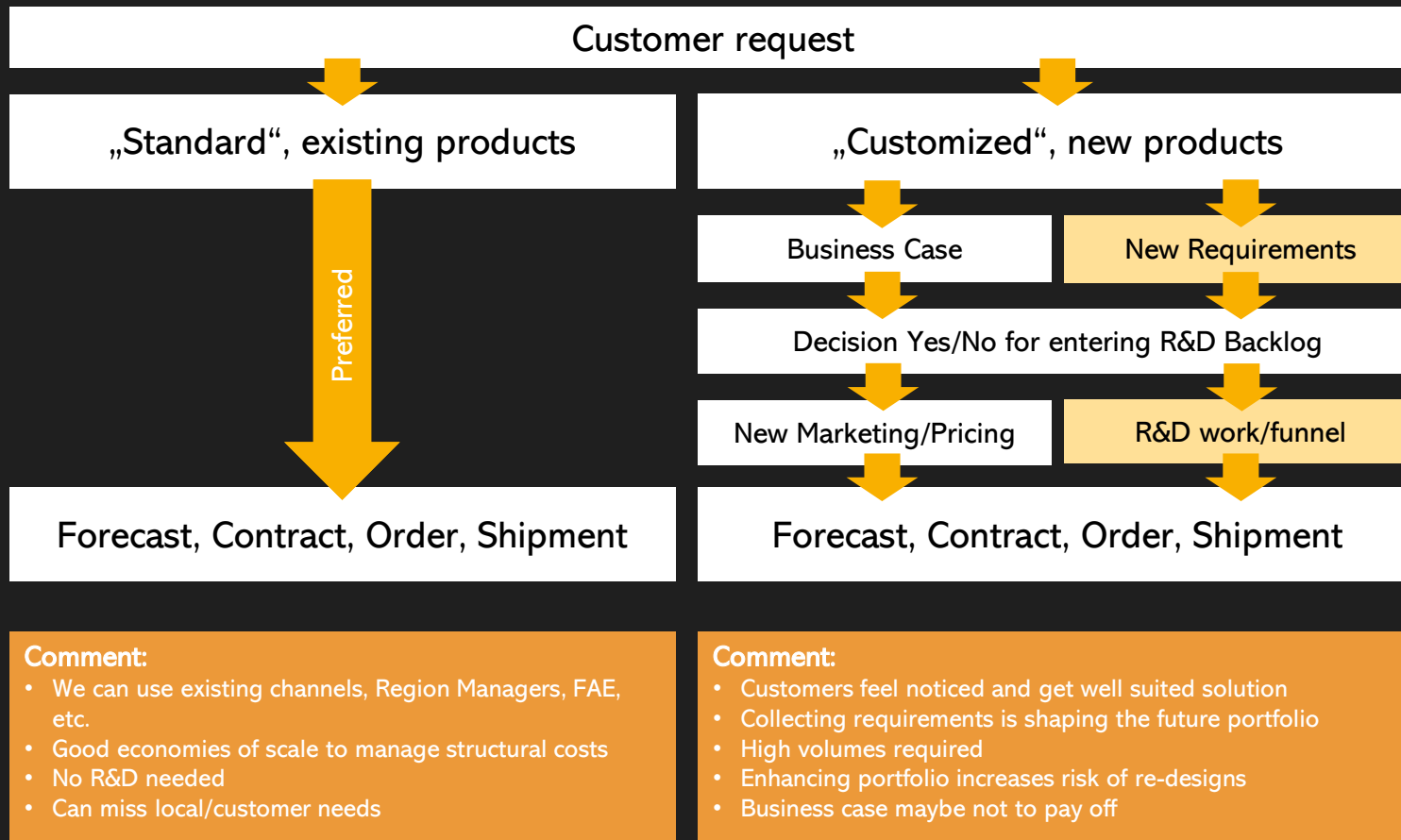
Charge Controllers → + 200,000

123,288 A/C smart charge controllers
(+68,813)



(xx,xxx) = pcs. 2021 *) licensed by partners 2021 **) customer demands/orders 2022

Focus is standard/existing product business



In all cases new requirements will be collected, evaluated and used to work on future portfolio.

This is very limited! Material shortages forcing re-designs and blocking significant R&D resources until mid of 2023.

How to handle competition?



- Accept competitors as normal, market is big enough
 - Mid-term we need to maintain „surviving“ customers during consolidation
 - Our products are competitive in pricing and we constantly continue to develop
- Make use of our reputation and visibility within eMobility
- Biggest competition is customer internal R&D department
 - Emotional arguments to be used 1st, rational 2nd
- It's ok not to attack every project as we cannot serve everything with individual solutions, several players will have their share, need to accept
- „The door is always open“, due to short product live cycles



Focus Topic 2

Our range of support from HQ

- Business and application/product training by BU-E & Academy
- Common price negotiations aligned with global bulk pricing
- Regular business development calls to discuss
 - Projects, market pricing, competition, regional strategy, forecasts, etc.
- Guidelines for „transferring“ business by e.g.
 - Customer changes production site
 - Business compensation - Company internal or Region-Region
- On-site support with PM, FAE, Ebee, etc.

- Duplication of success stories
 - Use and share stories from regular international calls
- Collecting requirements on what the customers really need next
 - Need to work hand in hand on future portfolio input
- Lot of countries adapting to IEC standards in charging
 - Make use of existing portfolio

Focus Topic 3

Sales strategy DC Charging Components & iONiX



Strictly Confidential – Bender internal use only

Companies and Responsibilities behind iNiX

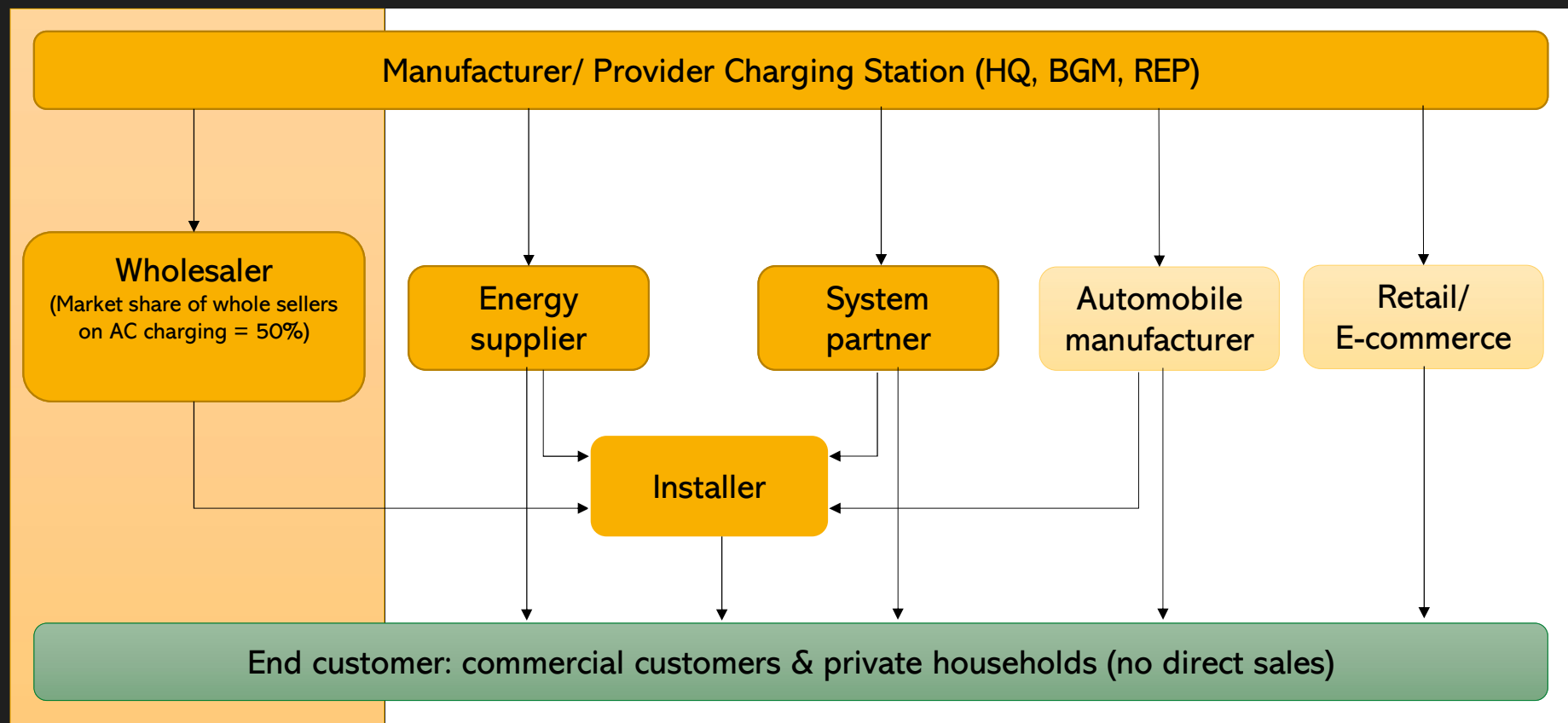


- Development and Supply of
 - Power Electronics
 - Mechanical Design
- Functions
 - Manufacturing
 - Logistics
- Acquisition support
- Brand Marketing
- Automotive Sales + France

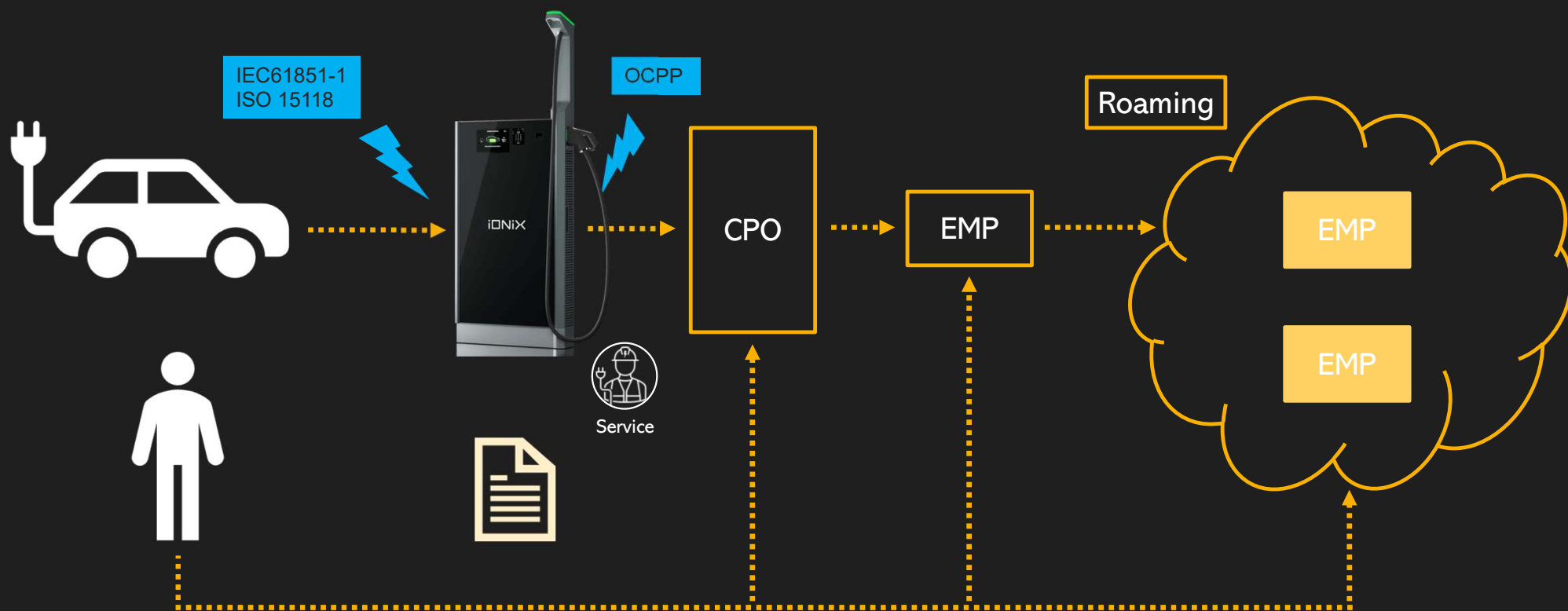


- Development and Supply of
 - DCC613 (DC Controller)
 - SU621 (SafetyUnit incl. IMD)
 - HMI180 (COMTRAXX)
 - ALM (Ambient light, 4G antenna)
- Functions
 - DC Meter control
 - Payment
 - Authentication
- Licensed Sales Channels (Industrial)

Mandatory sales channels / multi-level distribution of iONiX



eMobility infrastructure – Necessary roles to run „public EVSE“



➔ All „players“ need to be trained / treated well - This cannot be managed by Bender w/o partners!

Customer groups

- Specialized with certified training level and minimum annual quantities
 - Wholesalers
 - System partner/Operator/Energy providers/General contractor
 - BGMs as duo with external system partner on their side
- All other requests → reference to wholesale or system partners!

Why we do this

- Selling small quantities will not pay off economically due to high training efforts as well as needed support
- Need strong partners who are trained on our components/solution to manage projects by their own
- Licensed sales partners can manage projects together with Bender
- Partners and Wholesalers need to train their electricians and installers base

Rules and criteria for Direct Customer / System Partner



Rules and criteria

- Min. 100 stations purchase quantity per year
- Civil engineering / installation / configuration / maintenance / commissioning is covered
- Implementation of the billing service
- 1st and 2nd Level Support incl. 24/7 hotline is covered
- Training certificate received from Bender Academy

Things which will NOT work

- Product purchase/wholesale only
- Installation without Bender certification/ training
- Bender will not take the role of Charge Point Operator (CPO) or eMobility Service Provider (EMSP)
- Vehicle OEM is excluded because solution too expensive for now
- No appearance of Bender as Tier 1 to vehicle OEMs → role for SiA per cooperation agreement

iONiX and Ebee Station will not be part of main catalogue

System Partners - Overview



What is a system partner?

- Provide implementation of charge station from design to installation stage
- Can manage projects for Bender in case we are asked for charging solutions by industrial / hospital customers



Why do we need a system partner?

- Outsource work-load for design, installation & service
- No BGM is capable of covering needed efforts without support of a system partner
- Some BGMs can cover implementation aspects



How to establish a system partner status

- Specific training courses provided by Bender Academy
- Certificate of approval for sales
- Maintaining status



How to retain system partner status

- Mandatory training updates must be followed
- On-going trainings – no finalised completion of process

- Firstly, Bender/Ebee will complete iONiX Application
- DC components then can be sold to third-party DC Charge Station Manufacturers
 - Specific customers to begin with
- Pricing will be a 2-way approach:
 1. Cost of components at Market Pricing
 2. Cost of „design-in“ to cover high efforts compared with lower quantities in DC
- Sales via trained Bender channels with Technical Support from BHQ
 - More complicated than AC component sales



- iONiX

- 25kW Wallbox
 - Field tests = Q3/2022
 - SOP Q1/2023
- 50kW Station
 - + 2 Quarters



- DC Components (DCC, SU, etc.)

- Field test via iONiX
- Further tests Q4/2022
- SOP Q1/2023, sequential to iONiX
- Ramp-up is not secured due to material shortages



- BU-E to support on site and by cyclic calls individually
 - Rolling feedback from BGM/REP needed
- Specific sales rules apply to iONiX and Ebee station
 - Certified system partners and wholesalers as sales channels
 - 1st & 2nd level support etc. to be provided by system partner
 - BGM needs to work with system partner to cover all requirements/roles
 - e.g. BBX + Flexicharge
- DC Component sales to be started after iONiX application completion
 - Ramp-up not before Q1/2023
- Academy and BU-E will take care of training/certification process

Questions?





We are YOUR eMobility partner!

Contact:

emobility@bender.de
+49 6401 807-707