

Promoting the Uptake of Gaseous Vehicle Fuels, Biogas and Natural Gas, in Europe GasHighWay



NGV market in the Czech Republic

The logo for NGVA, with "NGVA" in large, bold, sans-serif letters. "NG" is green and "VA" is blue.

ASOCIACE NGV

28th of January 2010, Malmö, Sweden

Zdeněk Prokopec

chairman of the executive board

NGVA Czech

The logo for NGVA ASOCIACE NGV, with "NGVA" in large, bold, sans-serif letters. "NG" is green and "VA" is blue. Below it, "ASOCIACE NGV" is written in a smaller, bold, sans-serif font.

Presentation structure

- n Vehicle population
- n NGV number development
- n Filling stations
- n Prices of gas
- n NG cars available
- n Companies
- n Organisation
- n Legal framework

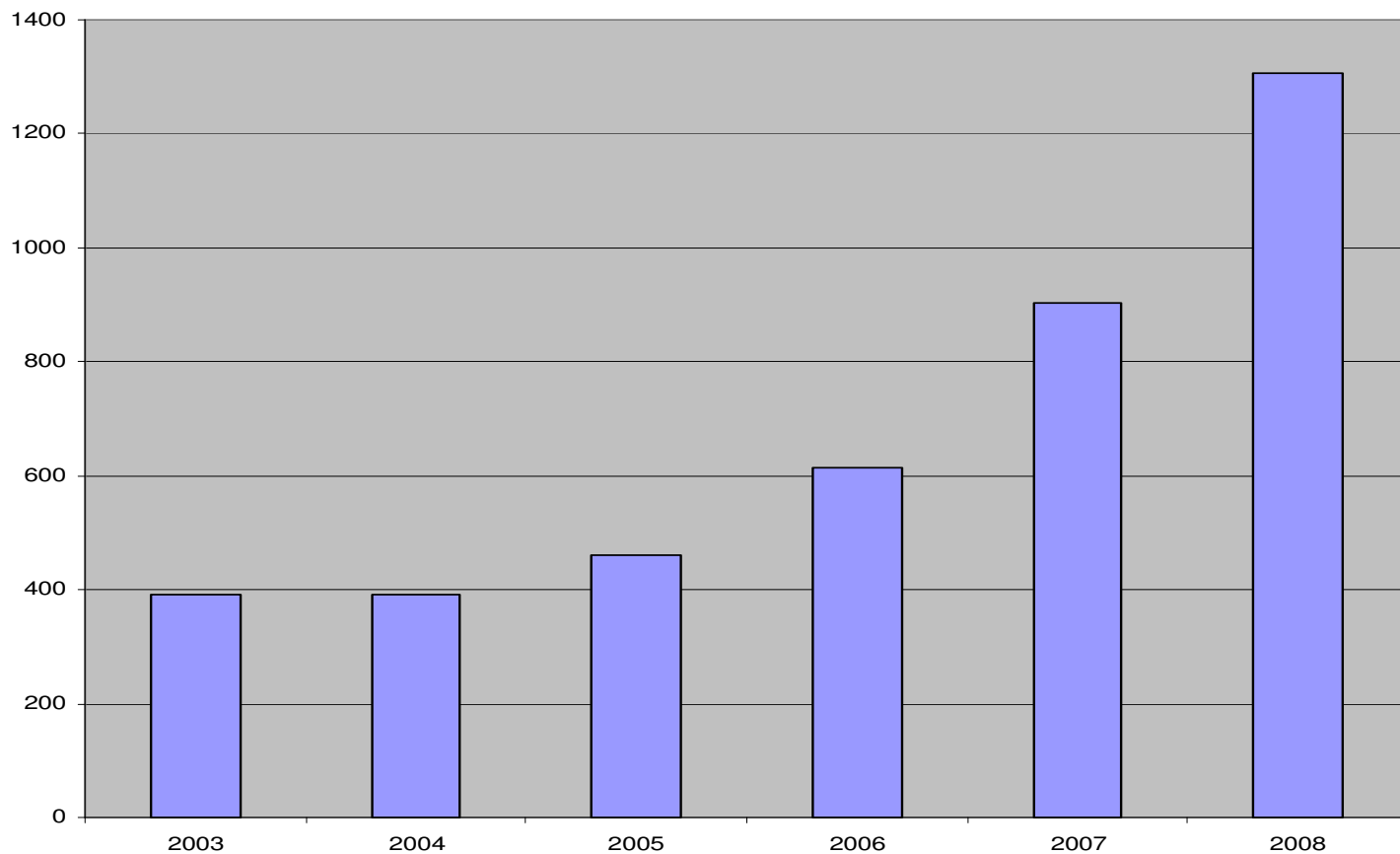
Current NGV population in the Czech Republic

In total 1500 vehicles, out of this number 250 buses

- n Total human population 10,221 mil. people, total vehicles per 1000 people is 492 (compare to Germany 558), total number of vehicles 5,033 mil.
- n In total over 1500 NG vehicles, where 1300 are passenger cars or vans, 250 buses, 17 waste collection trucks
- n This represents 0,03% of NGV share, 0,02% in passenger cars, 1,06% in buses (compare to Germany 0,17% total, 2,01% buses)
- n Main NGV fleets
 - § Transportation companies in bigger cities/towns
 - § Gas companies
 - § Companies in CNG business (Installers of filling stations, producer of cylinders, ...)

Development of NGV in the Czech Republic

Average year to year change 30% for last 5 years
Czech Republic



Filling station

Currently 20 public filling stations, additional 3 are in construction



Prices of gas

- **Running cost on NG are on average on 50% compared to petrol and 75% compared to diesel**
- n Price of petrol 95 Octan = 29,65 CZK = 1,12 EUR/l
- n Price of diesel = 28,07 CZK = 1,07 EUR/l
- n Price of CNG on public stations = 22,50 CZK = 0,86 EUR per kg or 16,50 CZK per m³ = 0,63 EUR
- n (all price levels as of 7.1.2010)



Available NG Cars

- **All major car maker original vehicles available on the market, about 10 converters with prices from 1.500 to 2.100 EUR**

Fiat (8 models): Doblò, Doblò Cargo, Doblò Cargo Maxi, Ducato, Fiorino Combi, Grande Punto, Multipla, Panda Panda

Volkswagen (8 models): Caddy, Caddy Life, Caddy Maxi, Passat Limousine TSI, Passat Variant TSI, Touran, Touran TSI, T5

Opel (4 models): Combo, Combo Van, Zafira, Zafira Turbo

Mercedes-Benz (4 models): B 170 NGT, Sprinter NGT -van, minibus, truck chassis, soon also E 200 NGT

Iveco (3 models): Daily -van, minibus, truck chassis

Ford (2 models): C-Max, Focus



Companies

- Interesting producer base for NG industry present in the Czech Republic

Producers of buses

- Tedom www.tedom.cz



- Iveco www.karosa.cz



- SOR www.sor.cz



• Producers of cylinders

- Vítkovice Cylinders www.vitkovicecylinders.cz



Companies

Interesting producer base for NG industry present in the Czech Republic

- Producers of CNG compressors
 - MOTOR JIKOV Strojirenska a.s. (home filling stations 5 m³/hour) www.jikovcng.cz
 - Aquacentrum Praha s.r.o. (filling station up to 25 m³/hour) www.cngcentrum.eu



- Filling station installers – diverse smaller companies
- CNG conversions – diverse smaller companies

Organisation

New establishment of NGVA in the Czech Republic

- n Newly founded NGVA (Czech) as national technology platform

Members:

- § Leading CNG industry players
 - § Czech Automotive association (with its 150 members including Skoda Auto, ..)
 - § Czech Technical University, Faculty of combustion engines
 - § Czech Chemical – Technological University
- n close co-operation with Czech Biogas Association
 - n EU subsidy project initiated
 - n Suppliers promotion
 - n Other promoting activities by gas companies

Legal framework

Government actions encourage use of NGV in the Czech Republic

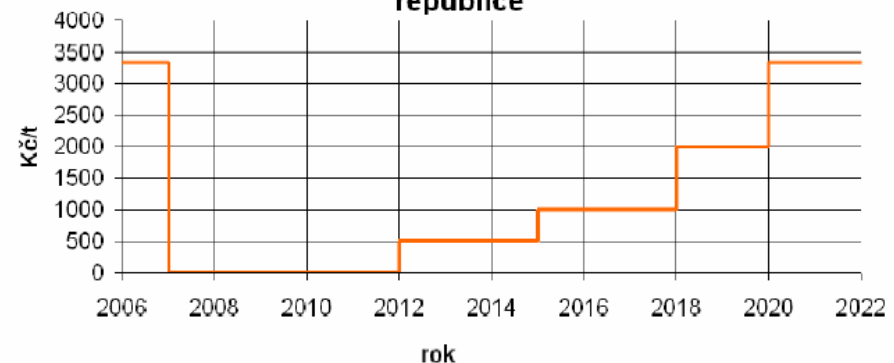
- n Agreement of Government and Gas companies to build by 2020 100 CNG filling stations

- n Stabilisation of consumer tax on CNG

- n zero until 2011

- n at 2020 3,5 CZK/kg = 0,13EUR

Spotřební daň na CNG určený k použití, nabízený k prodeji nebo používaný pro pohon motorů v České republice



- n Subsidy of 50% of extra cost on CNG bus by Government, additional approx. 25% by gas companies

- n Zero road tax for vehicles up to 12 t

- n Program to achieve 25% content on EEV in governmental/municipal use in passenger cars (CNGV are considered EEV)

NGVA

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