

# Annual General Meeting & General Meeting of Depository Receipt Holders

June 8th 2023, Amsterdam, The Netherlands






# Introductions

## Management Board



**Michiel  
Langezaal**  
CEO & Founder



**Victor  
van Dijk**  
CFO


## Supervisory Board



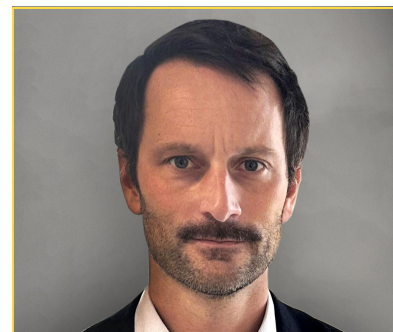
**Bart  
Lubbers**  
Chair & founder



**Marije  
van Mens**  
Chair remuneration  
committee



**Nancy Kabalt**  
Member



**Jérôme  
Janssen**  
Member

## FAST Board



**Maaïke  
Veen**  
Chair

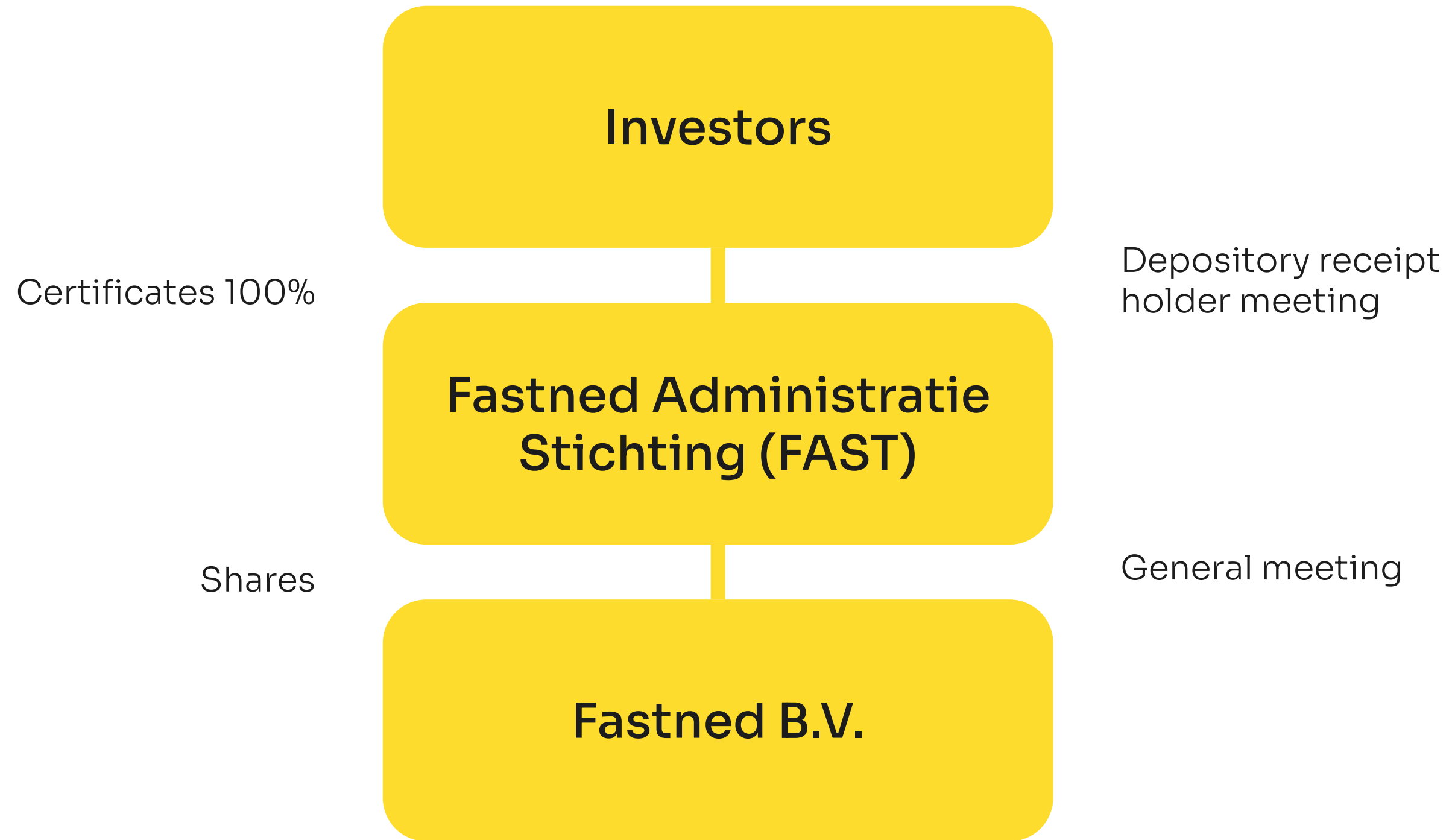


**Henk Pals**  
Secretary



**Liselotte Kooi**  
Member

# Structure



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# AGM 2023 agenda

## Welcome by Bart Lubbers

### DR Holder Meeting

1. Opening by Maaïke Veen
2. Report of activities 2022 and update 2023
3. Questions
4. Proposal for granting discharge of the FAST board members - for approval by DR Holders
5. Resignation of Liselotte Kooi as FAST board member
6. Proposal for appointment of Michiel Weghs as new FAST board member - for approval by DR holders
7. Proposal for appointment of Henk Pals for his second term - for approval by DR Holders
8. Proposal for remuneration FAST board members - for approval by DR Holders
9. Questions and remarks which are related to the General Meeting and the voting of FAST during the General Meeting
10. Closing

## Short break

### General Meeting

1. Opening
2. Annual report 2022
  - a. Management report
  - b. Supervisory Board report
  - c. Remuneration policy - for approval by FAST
3. Questions
4. Adoption of the financial statements 2022 - for approval by FAST
5. Explanatory notes on the Dividend Policy and distribution - for approval by FAST
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  - a. Proposal for granting discharge of the Management Board - for approval by FAST
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  - c. Resignation of Marije van Mens as Supervisory Board Member
7. Appointment of external auditor BDO for 2024 - for approval by FAST
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9. Re-appointment of Bart Lubbers as non-independent Supervisory Board Member of the Supervisory Board for his second term.
10. Proposal to designate the Management Board as the competent body to issue shares and rights to subscribe for shares up to 20% of the issued capital - for approval by FAST
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### Deep dive on our progression

1. The service area of the future by Maria Garcia
2. The Network Developer's Handbook By Tom Hurst
3. Questions



**General Meeting  
of Depository  
Receipt Holders**



# DR Holder meeting agenda

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Secretary

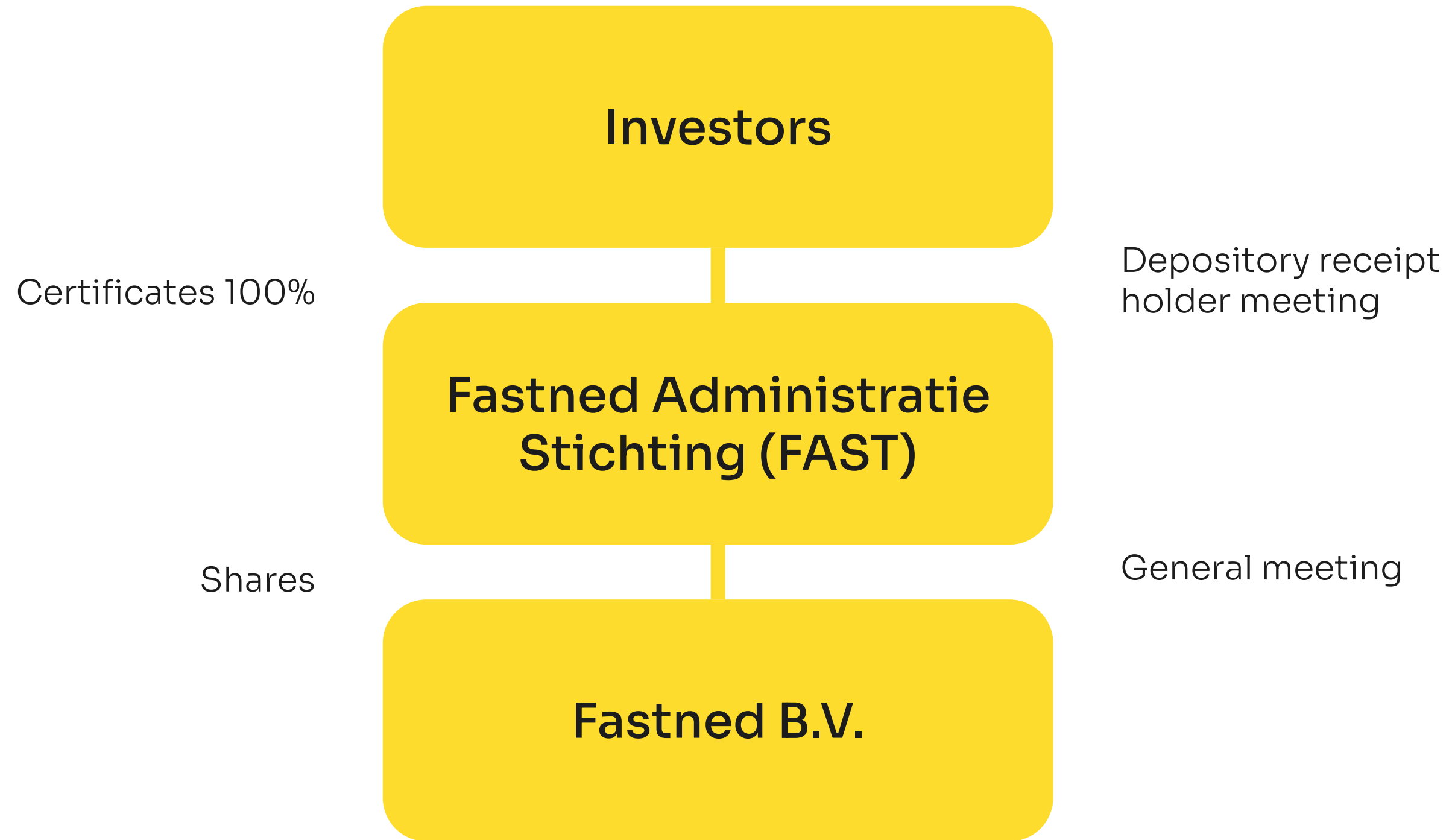


**Maaïke Veen**  
Chair



**Liselotte Kooi**  
Member

# FAST structure





# Report of activities – Tasks and Responsibilities

## Tasks and responsibilities of FAST

FAST assesses whether its decisions as shareholder are in line with Fastned's statutory goals, being:

- ☺ Realising the mission of Fastned
- ☺ Ensuring the continuity of Fastned
- ☺ Representing the interest of the depository receipt holders.



# Report of activities - Decisions taken

- Adoption of the annual statements over 2022
- Appointment of Deloitte as the accountant for 2022
- Discharging of the members of the management board and the members of the supervisory board, as well as the dismissal and appointment of supervisory board members.
- Providing a proxy for the issue of ordinary shares and to exclude pre-emptive rights in the execution of Fastned's mission and option plan

- Approval of the decision by Fastned to not distribute any dividends
- Appointment of BDO as the accountant for 2023
- Amendment of the articles of FAST
- Appointment of Jérôme Janssen as member of the Supervisory Board
- The placement of new Depositary Receipts with Schroders Capital



# Report of activities

- 👉 Fastned built more fast charging stations
- 👉 Upgraded existing stations with faster chargers
- 👉 Delivered more renewable electricity to more customers, acquired locations to build new stations
- 👉 Hired talented new people to accelerate the transition to electric mobility

More details can be found in the published Fast Board report 2022.



FAST Management Report  
2022

**Questions?**



**BREAK**

# **General Meeting**





## General Meeting of Shareholders

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# Management report

**Michiel**

CEO & Founder

**Victor**

CFO





## Our mission

Accelerate the transition to electric mobility by giving freedom to electric drivers

## Our goal

A European network of 1,000 large stations



100%  
local sun  
& wind  
energy<sup>1</sup>

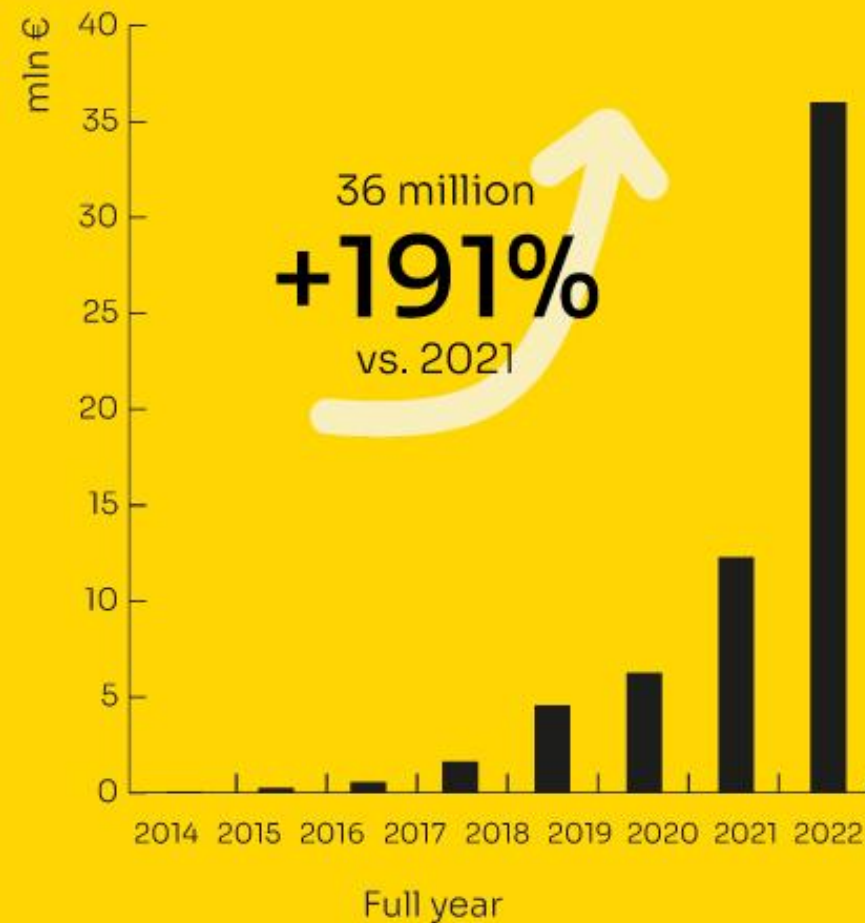
**Our climate impact:** With every kWh sold we displace fossil fuels burning into the atmosphere

1) For every kWh sold through the grid we buy local (same or adjacent country) solar&wind guarantees of origin

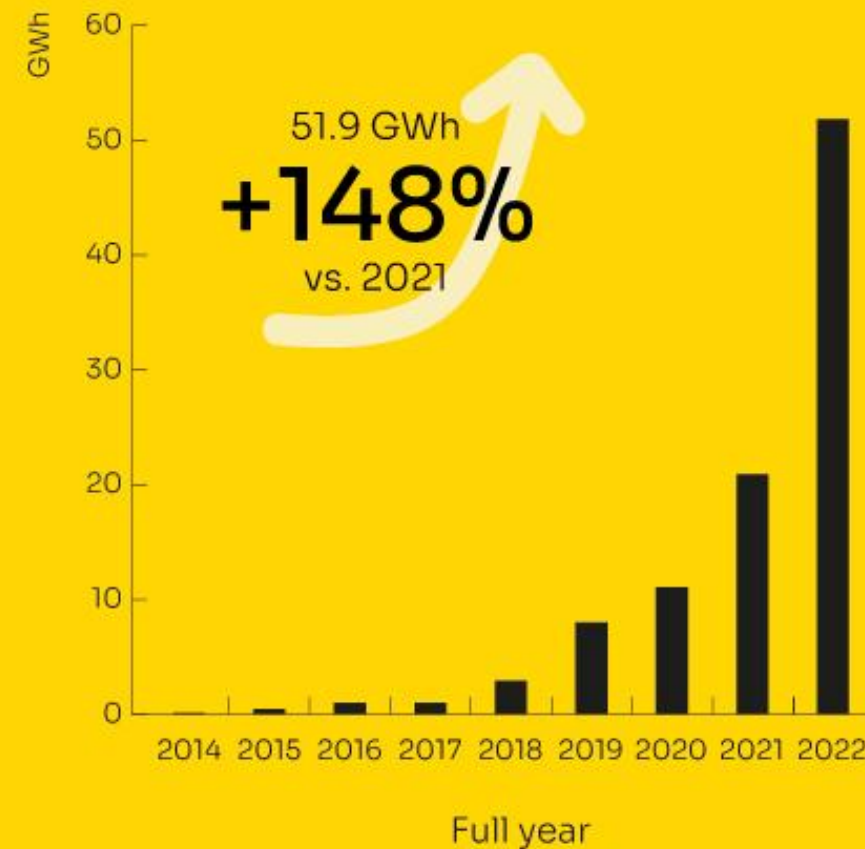


# Fastned in numbers

## Revenues related to charging



## Energy sold



  
Charging  
sessions

2.32 million  
**+114%**  
vs. 2021

  
DC fast  
chargers

1,237  
**+62%**  
vs. 2021

  
Active  
Customers

218,600  
**+96%**  
vs. 2021

  
CO<sub>2</sub>  
avoided

40,750 tonnes  
**+148%**  
vs. 2021

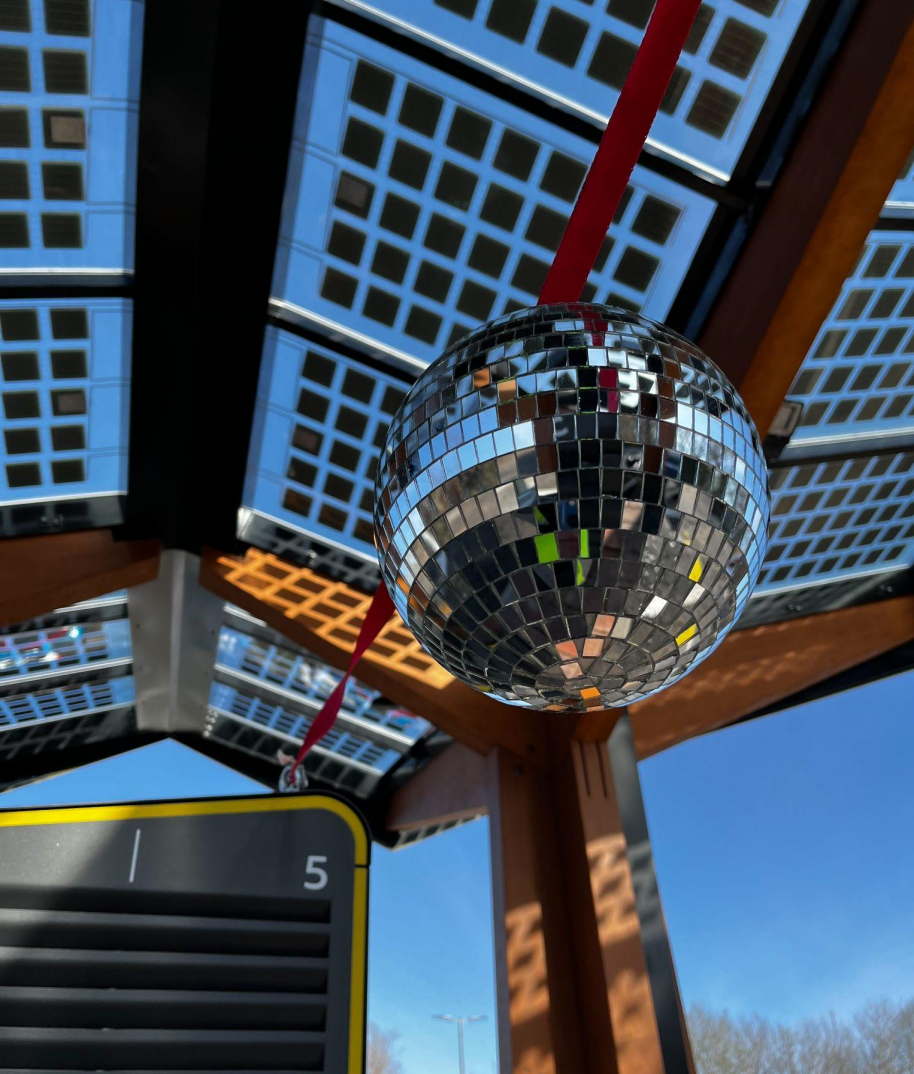
- ✓ Built a record number of 56 stations in 2022
- ✓ Unparalleled track record of winning public tenders
- ✓ Unleashing potential by hiring 60 new talented, motivated individuals
- On track to become underlying EBITDA positive in 2023



**Our talented people are the foundation of reaching results and milestones**










# 262\*

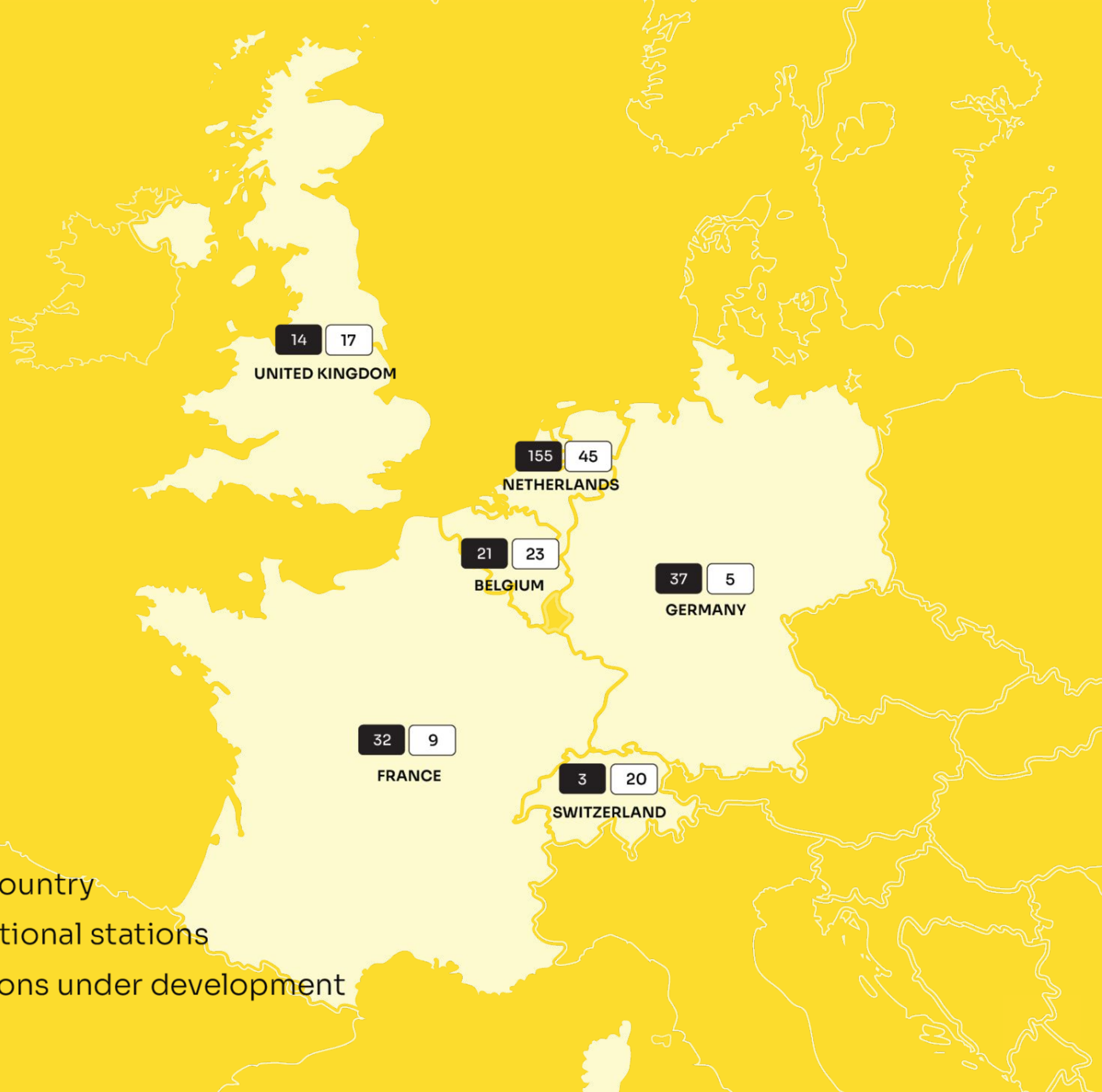
OPERATIONAL STATIONS  
ACROSS EUROPE

# 127

LOCATIONS IN  
DEVELOPMENT

\* June 1st, 2023

-  Presence in the country
-  Number of operational stations
-  Number of locations under development





# La Maxe (France) - daily traffic ~43,000



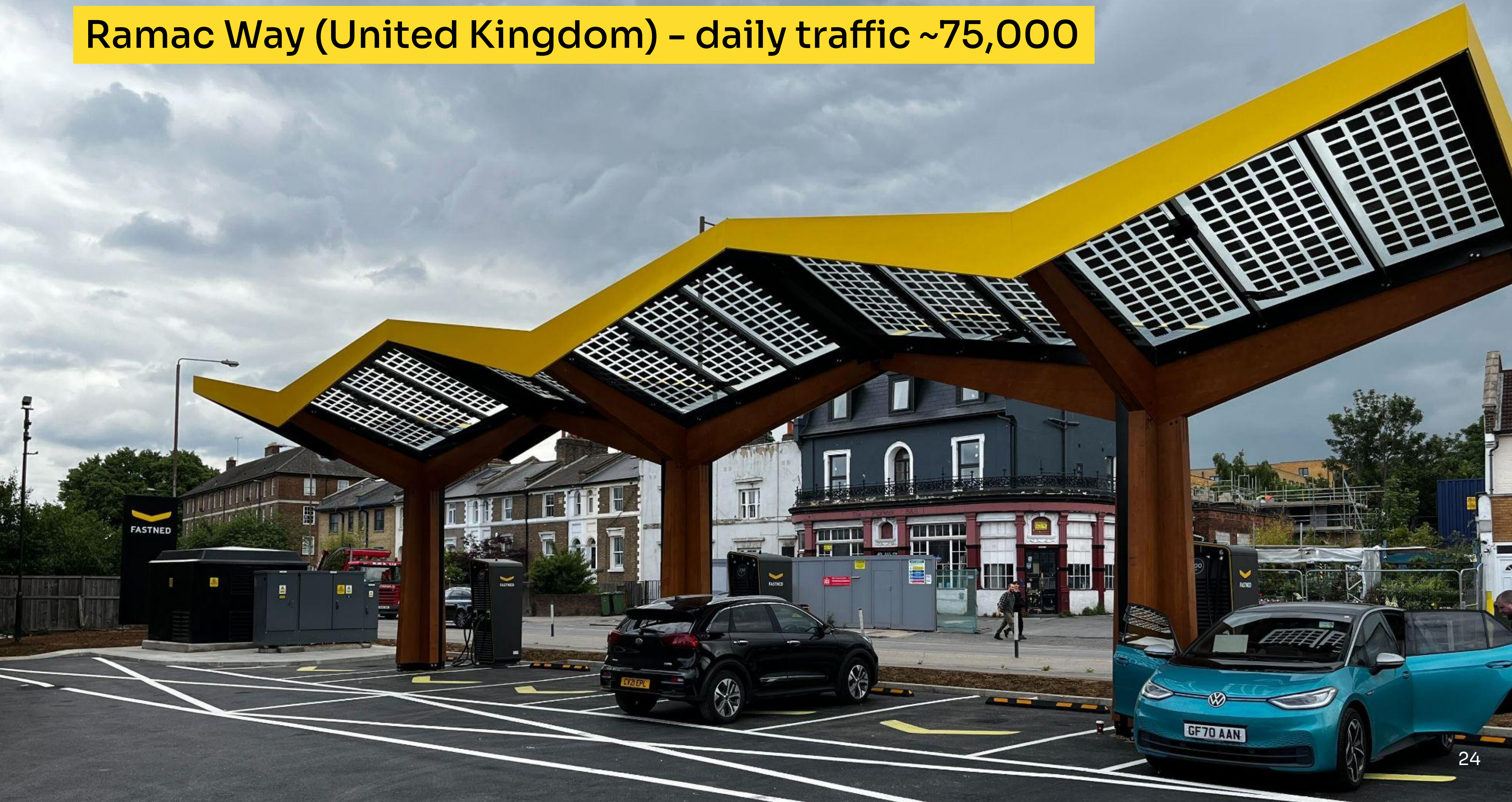


Vémars (France) - daily traffic ~41,000





# Ramac Way (United Kingdom) - daily traffic ~75,000





# Parsons Road (United Kingdom) – daily traffic ~38,000





**De Mussels (The Netherlands) – daily traffic ~23,000**



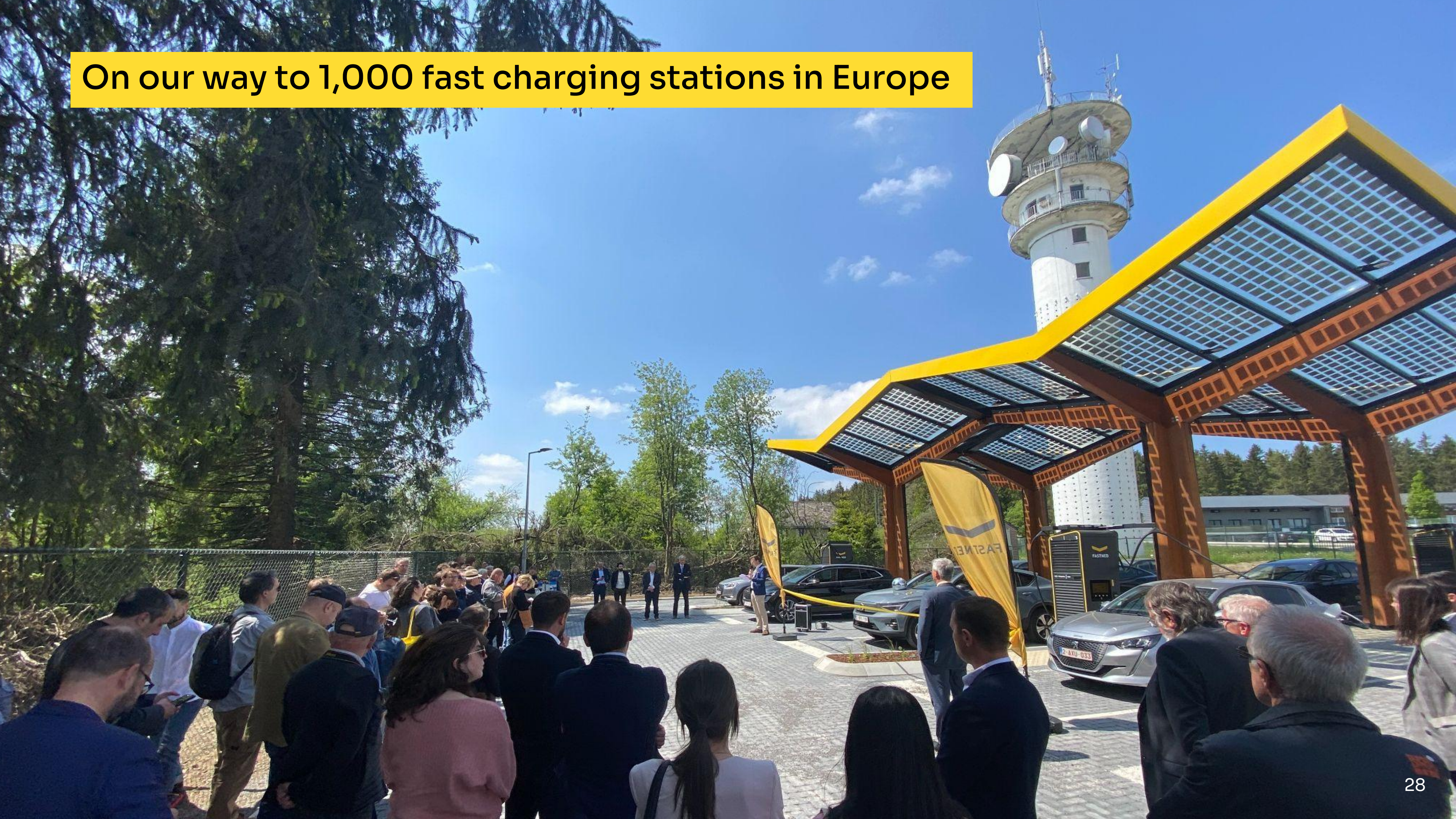


**Brecht (Belgium) – daily traffic ~30,000**





On our way to 1,000 fast charging stations in Europe





# Fastned's first capital markets day fuels funding success




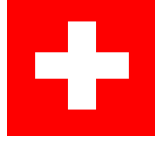

- ✓ A step up in our investor education
- ✓ First capital markets day leads to significant funding
  - €75m private placement from Schroders Capital's infrastructure fund strengthens financial position
  - €34m bond issuance empowers funding strategy







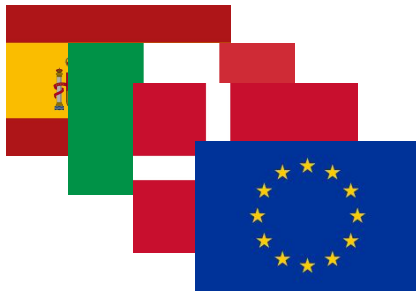
# We built on our unparalleled track record in winning tenders again in 2022

## Decade 1

-  201 motorway locations (LLA: 15 years between 2013-20)
-  9 urban sites between 2018-22 (LLA: 5-25 years)
-  26 motorway locations in 2019-21 (LLA: >15 years)
-  20 motorway locations in 2019 (LLA: 30 years)
-  35 motorway sites between 2020-22 (LLA: 14 years)

Win rate above 20-25%

## Decade 2

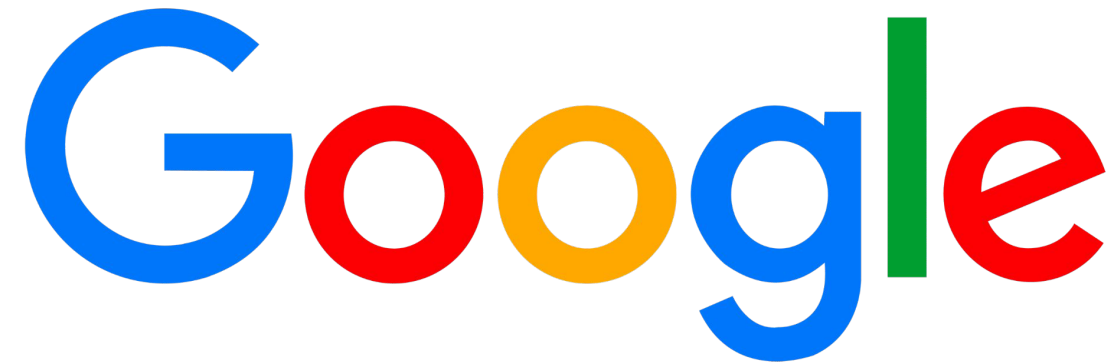
-  New policy criteria indicates a great potential for separate, dedicated and sizeable charging locations
-  Two tenders ongoing: one for fast charging on 200 unserved resting areas, a second for 900 fast charging stations off-highway
-  Multiple opportunities developing across Europe, both on the level of public tenders and bilateral discussions with location owners

First tender experience in Europe evidenced that **separate fast charging concessions on MSAs are key** to accelerate the transition to electric mobility

New tender processes are building on this experience and providing a **huge pool of opportunities for Fastned** to capitalise on its track record and expand its network



# Best concept



Reviews

Highest Google reviews in the market  
vs. competition between 3.3 and 4.1

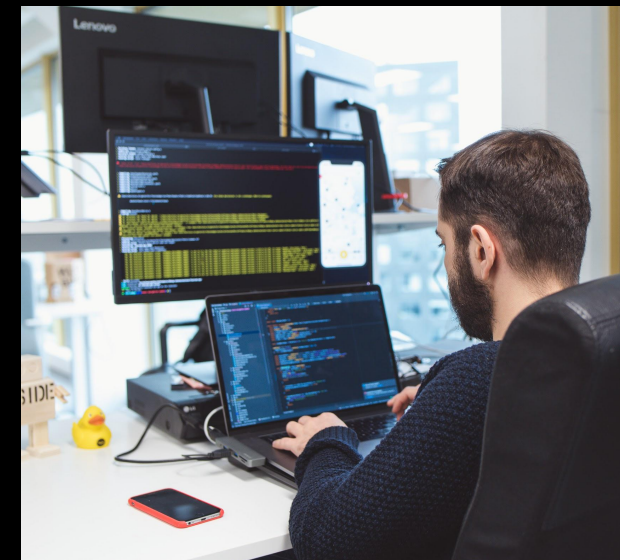
4.4 / 5



Great design



Ops. excellence



Best in class CX



Efficient builders



# Great design: Gentbrugge, the future of service areas in Europe





A technician wearing a high-visibility yellow vest with 'FASTNED' on the back is working on an electric vehicle charging station. The station is a large, grey, industrial-looking unit with multiple charging ports and a digital display. A dark-colored car is parked at the station, and a charging cable is plugged into it. The background shows a paved area and some buildings under a clear sky.

## Operational excellence through our Network Operations team

- ✓ Delivered more than 99% uptime on our entire network, through the year
- ✓ Automating the monitoring of our network through advanced data analytics tools with the goal of identifying most charger faults without manual intervention
- ✓ Deploying state-of-the-art payment terminals across our network, enabling users to pay frictionless
- ✓ Continuously improving customer experience by optimising key metrics such as session success rate and leveraging our close collaboration with charger manufacturers



# Efficient builders: the driving force behind our speed and quality





# The new **Fastned** app on **Apple CarPlay**





# 1st station built using electric equipment - Lingehorst, NL



- ✓ Utilising low-emission construction techniques instead of diesel-powered equipment
- ✓ 77% less CO2 emitted and 82% NOx reduction compared to a traditionally built Fastned station of equal size
- ✓ Leveraging insights from this pilot project to further minimise emissions in future construction endeavors
- ✓ Low emission construction should become a competitive element for future tenders



# Underlying company EBITDA expected to be positive in 2023

	Delta YoY			
€ million	'21-'22	2020	2021	2022
<b>1 Revenues related to charging</b>	191%	6.3	12.4	36.0
<b>2 Gross profit related to charging</b>	135%	5.2	8.7	20.5
<i>Gross profit per kWh (€)</i>	(5%)	0.47	0.42	0.39
<b>3 Network operation costs</b>	94%	(4.3)	(6.4)	(12.4)
<i>Network operation costs per charger (€k)</i>		11.8	11.0	12.7
<b>Operational EBITDA</b>	244%	0.9	2.4	8.1
<b>4 Network expansion costs</b>	78%	(4.7)	(6.8)	(12.0)
<i>Network expansion costs per station built (€k)</i>		119	154	204
<b>5 Underlying company EBITDA</b>		(3.8)	(4.4)	(4.0)
Exceptional items		(0.1)	(8.2)	(0.5)
<b>EBITDA</b>		(3.9)	(12.6)	(4.6)
D&A and provisions		(4.1)	(5.9)	(10.3)
Finance income/(cost)		(4.4)	(6.2)	(7.4)
<b>Underlying net profit</b>		(12.3)	(16.4)	(21.7)
<b>Net profit</b>		(12.4)	(24.6)	(22.2)
<b>Capex</b>		8.5	36.6	67.5
<b>6 Cash level</b>		33.9	128.6	149.5

## 1 Strong revenue growth drivers

Revenues continue strong growth, driven by BEV sales and station openings

## 2 Proven gross profit per kWh stability

Despite volatile energy markets, due to adaptive pricing strategy

## 3 Network operation costs per charger expected to remain stable

## 4 Network expansion costs per station built increases, driven by station roll out

## 5 Underlying company EBITDA expected to be positive in 2023

Based on continued revenue growth and above drivers, we expect Underlying company EBITDA to be positive in 2023

## 6 Funding

Funding to date:

- > € 240 million in equity funding realised
- > € 110 million in retail bond funding realised

Current funding allows to build more than 400 operational stations, expected in 2025

Likely future funding options include (but are not limited to) retail bonds, accelerated bookbuilds and/or private placements



# When done well, fast charging has an attractive business case

€k	Average station Q4 2019	Average station Q1 2023	Top 5 station Q1 2023
BEV fleet penetration	0.9% <sup>1</sup>	~3.1% <sup>1</sup>	~3.8% <sup>1</sup>
Average daily traffic	~30k	~30k	~90k
Utilisation	10%	13%	38%
<b>Average MWh delivered (Annualised)</b>	<b>105 MWh</b>	<b>331 MWh</b>	<b>1,126 MWh</b>
Annualised revenue / station	€61k <sup>2</sup>	€214k <sup>2</sup>	€675k <sup>2</sup>
Gross margin	51 (€0.49/kWh)	151 (€0.46/kWh)	477 (€0.42/kWh)
Operating costs per station	31 <sup>3</sup>	66 <sup>3</sup>	76 <sup>3</sup>
<b>Operational EBITDA (B)</b>	<b>20 (33%)</b>	<b>85 (40%)</b>	<b>401 (59%)</b>
Initial investment (A)	307	581	750
<b>ROIC (= B / A)</b>	<b>6.5%</b>	<b>15%</b>	<b>53%</b>
ROIC at 30% utilisation, current charge speed	>30%	>40%	>40%

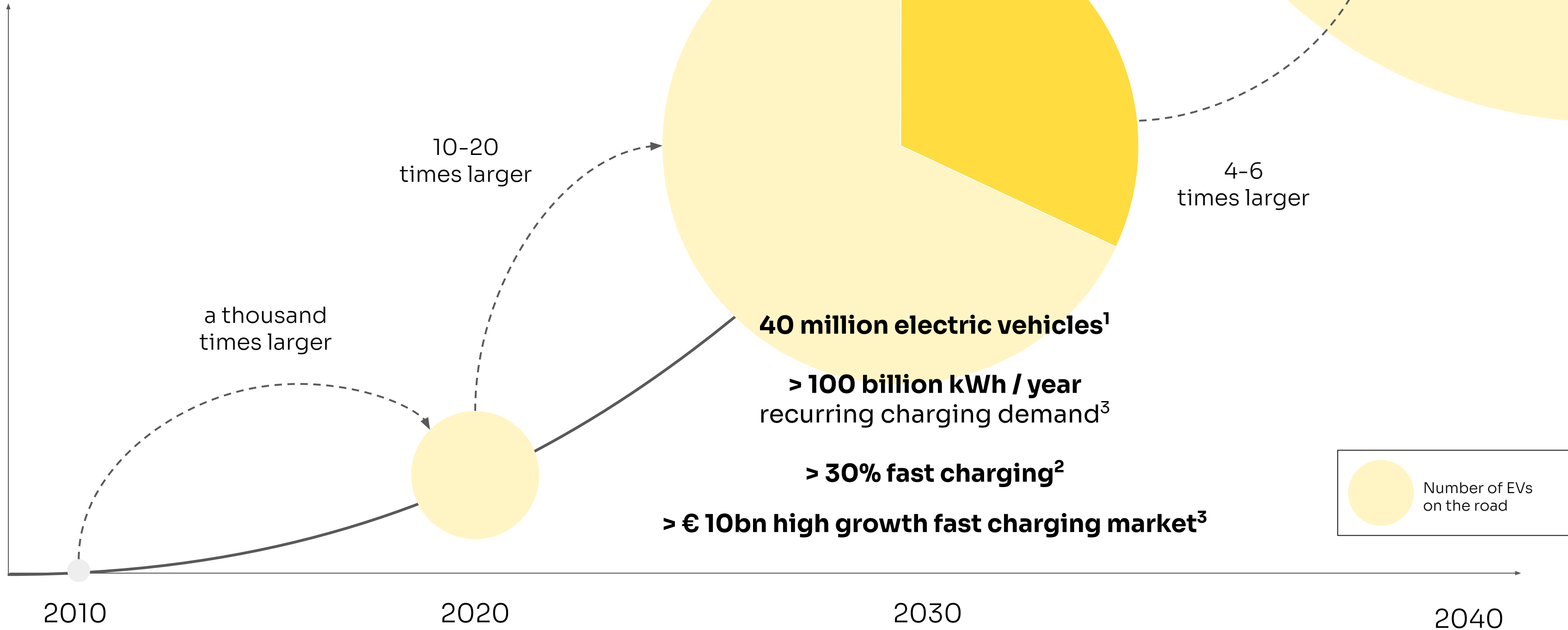
- Station sales relatively predictable when:
  - Developing stations on high traffic locations
  - Offering a great customer experience
  - BEV fleet share increasing
- Optimisation is key:
  - Great concept -> higher sales
  - Station design -> high utilisation potential
  - Efficient capex & opex -> higher return potential
  - Combination -> flexibility to optimise pricing & returns -> Offer great customer value at a fair price level
- Key to success is to get all the elements right

1) Average across Fastned countries weighted by the number of stations in each country, 2) Annualised revenue related to charging for the period, 3) Based 2023 EUR 12.7k per charger (average of the period)



# EV fleet is scaling: creating large recurring fast charging market

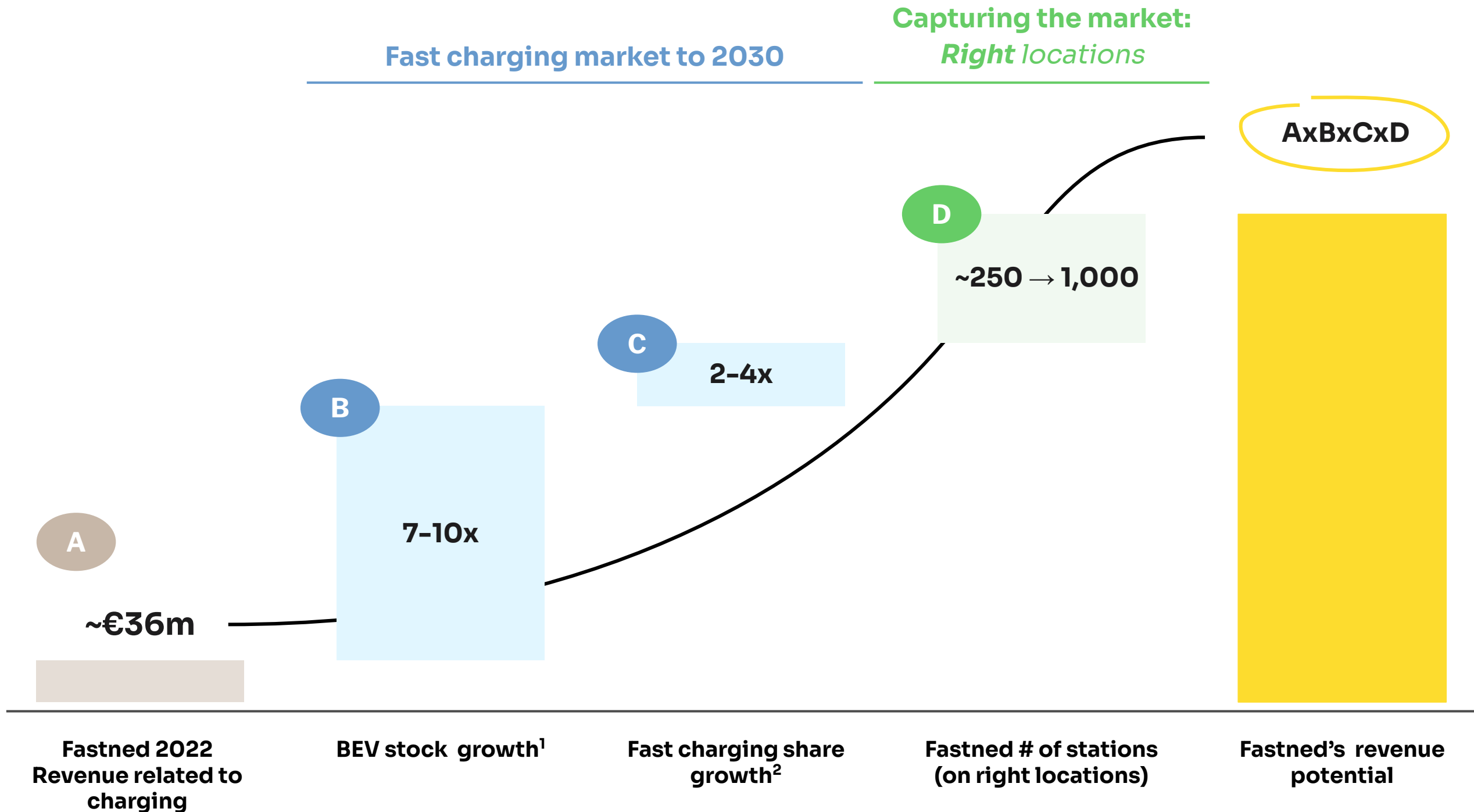
## Number of EVs on European roads



Sources: 1) Arthur D. Little, 2) McKinsey & Company, The Boston Consulting Group and ChargeUp Europe (fast charging share), Fastned analysis



# Fastned revenue potential: BEV stock growth x fast charging growth x right location growth



- ▼ Fast charging demand accelerating
  - 7-10x more BEVs
  - 2-4x more fast charging
- ▼ High traffic locations are paramount to capture this market
- ▼ Fastned # locations to grow 4x
- ▼ Revenue potential growing accordingly

1) Derived from Schmidt Automotive research forecasts, 2) derived from fast charge share projections by TNO, McKinsey, Boston Consulting Group and ChargeUp Europe



# Guidance & outlook

## Network

- Build >60 new stations in 2023
- Reach >350 stations by year end 2024
- >400 stations operational target reached in 2025
- Target of 1,000 stations before 2030

## Financial<sup>1</sup>

- Revenue per station >€400k in 2025 and >€1m in 2030
- Operational EBITDA margin >40% by 2025
- Underlying company EBITDA positive in 2023

1) Based on current forecasts. Underlying company EBITDA excludes exceptional items such as employee options.







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# **Supervisory Board report**



# Supervisory Board Members



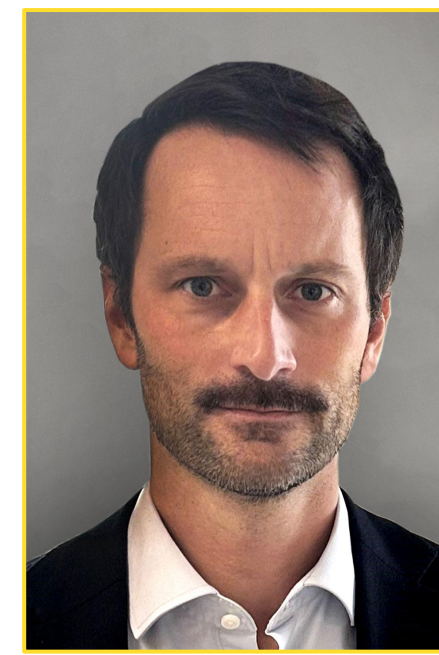
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**Questions?**



**Closing of the  
Annual General Meeting  
&  
General Meeting of  
Depository Receipt Holders**



# The Network Developer's Handbook

**Tom Hurst**

UK Country Manager / Expansion Lead





# **What** we look for **in our locations** and **why**

An insight into Network Development strategy



# What defines a valuable location

1

Locations where drivers have a natural **high need for charge**

2

Locations with **long-term contracts**

3

Locations that are **visible, accessible, and scalable**



1

**A high need for  
charge makes our  
customer base more  
valuable**



# What is the shopping street of e-mobility?

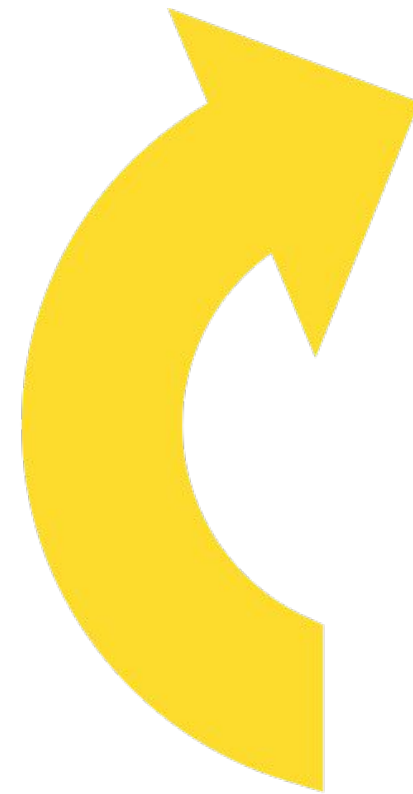




# Example: supermarket versus highway charging

## Supermarket

- Primary need is shopping; charging is secondary
- Dwell time determined **by the time to shop**
- State of charge can be anything



## Highway

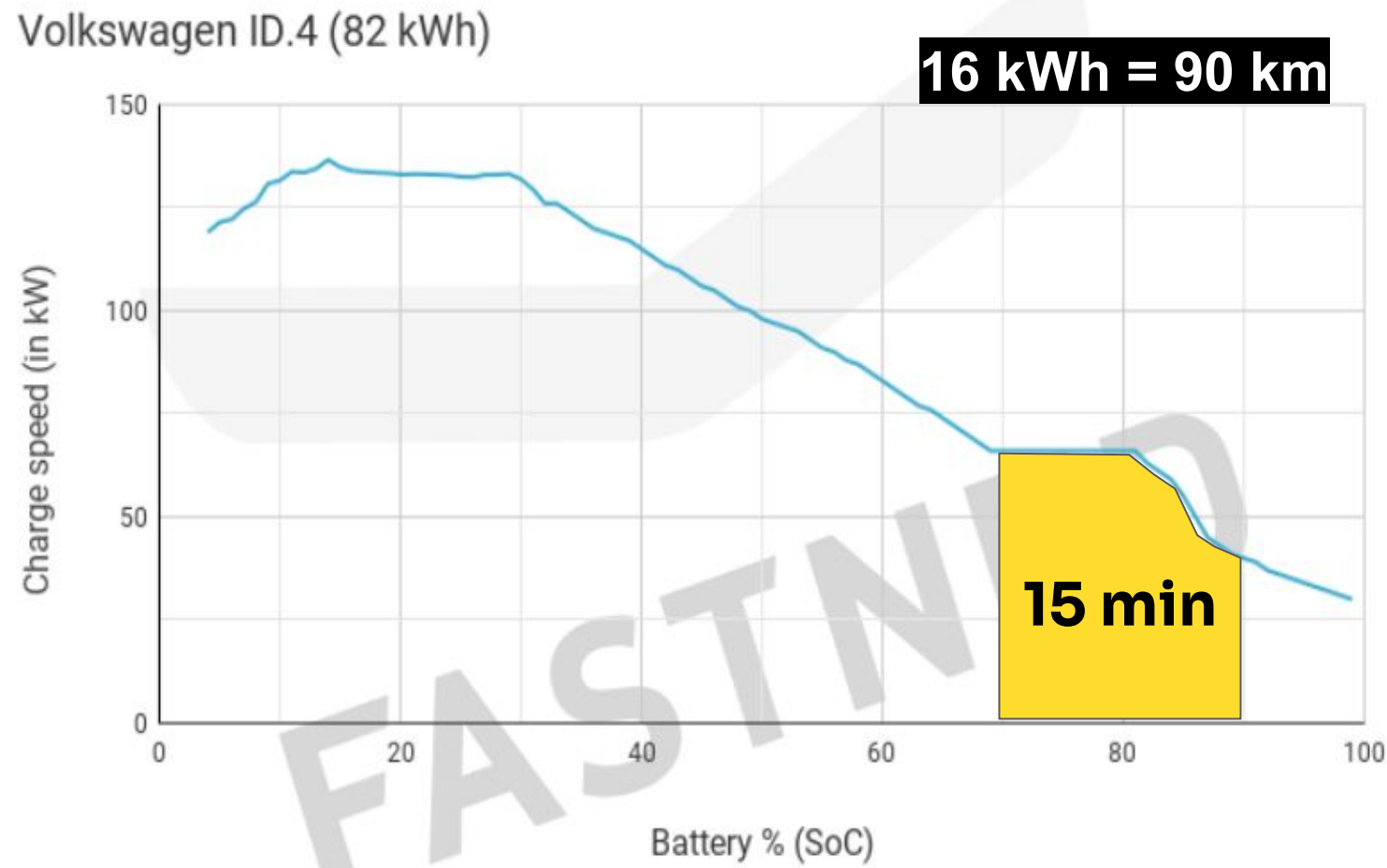
- Primary need is charging, in order to continue the journey
- Dwell time is **as short as possible**
- State of charge is usually low



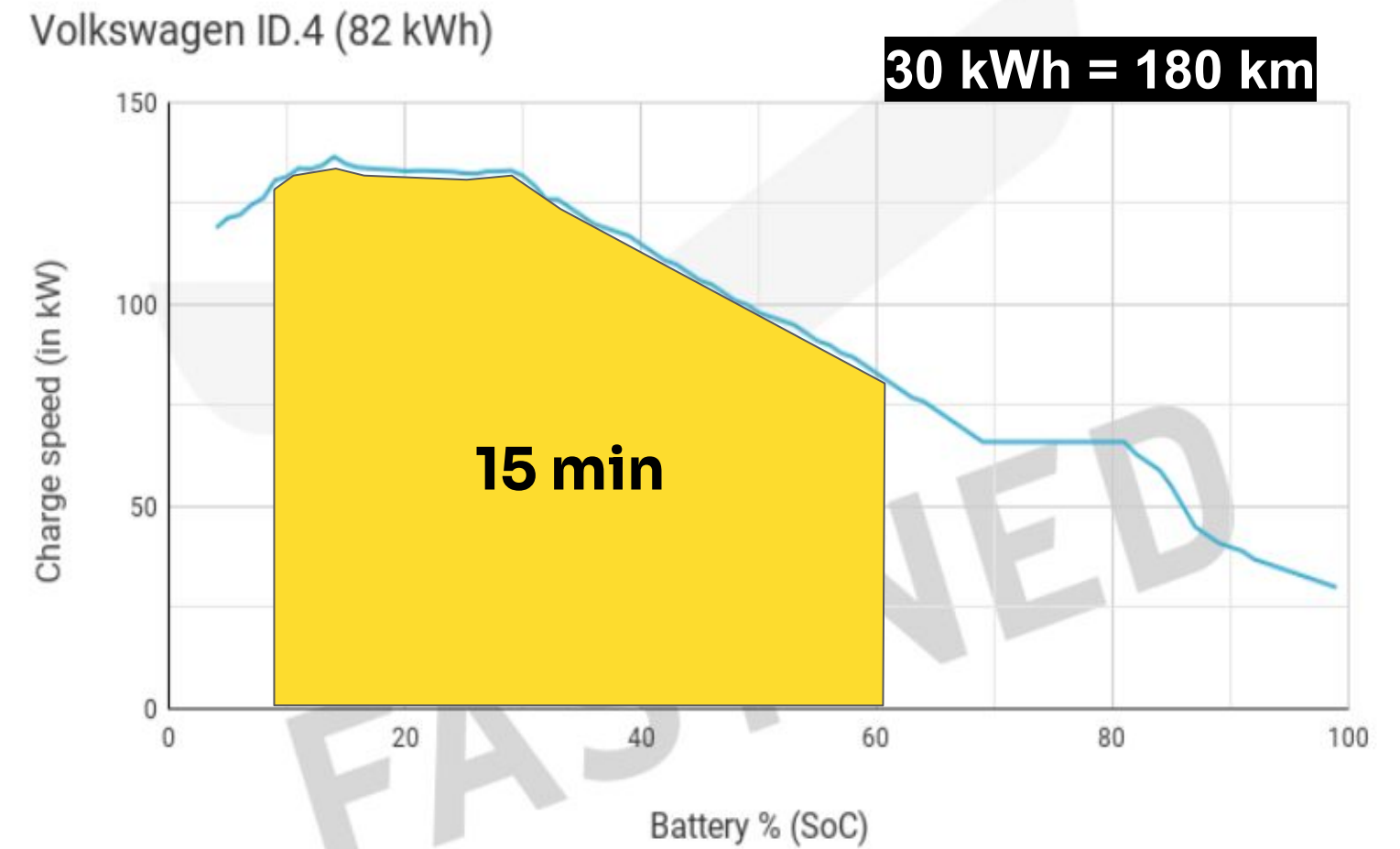


# Example: VW ID.4 at Supermarket or Highway for 15 minutes

## Supermarket



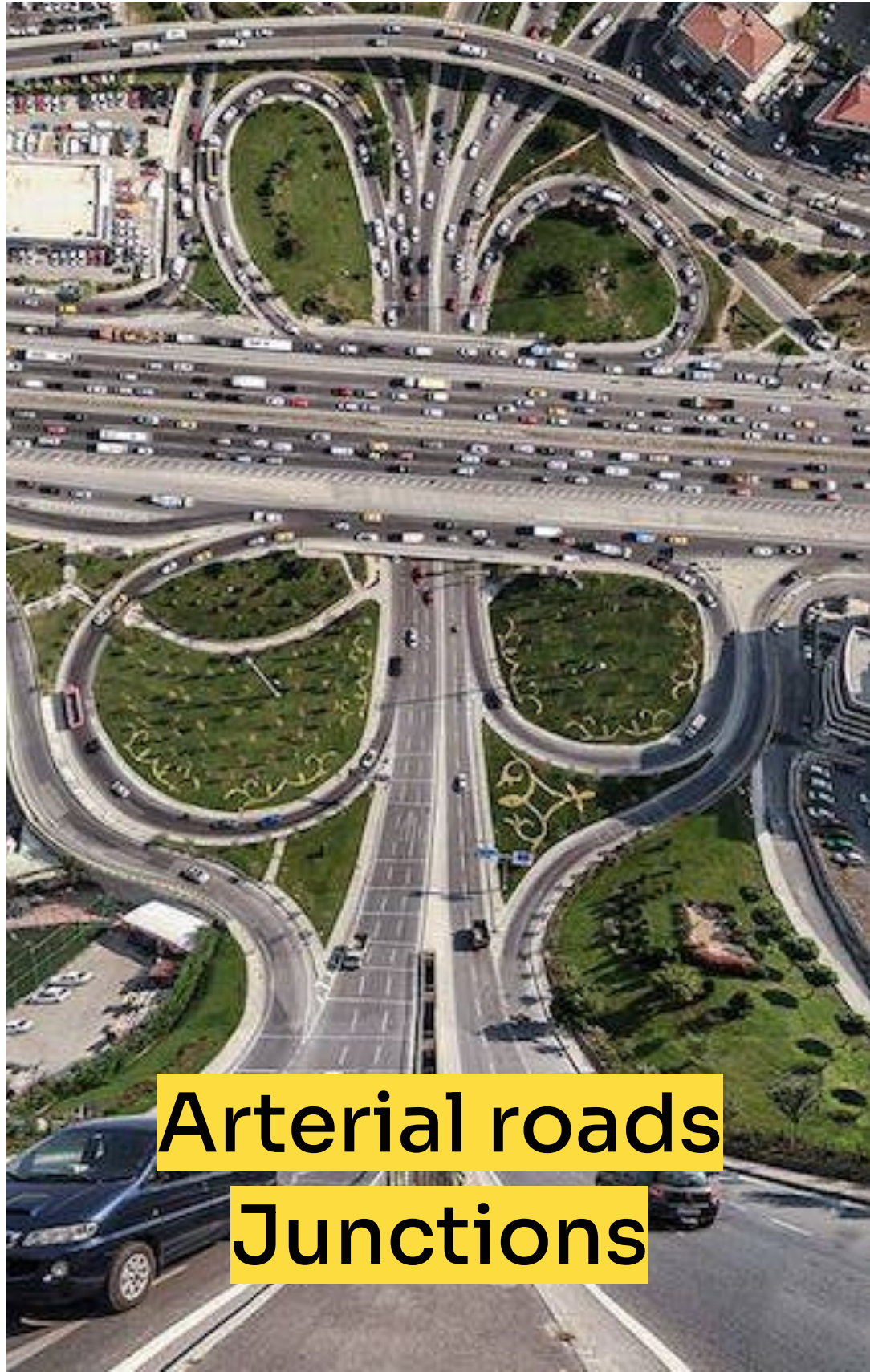
## Highway





**In the same 15  
minutes, our  
customer has charged  
twice as much**





**Arterial roads  
Junctions**



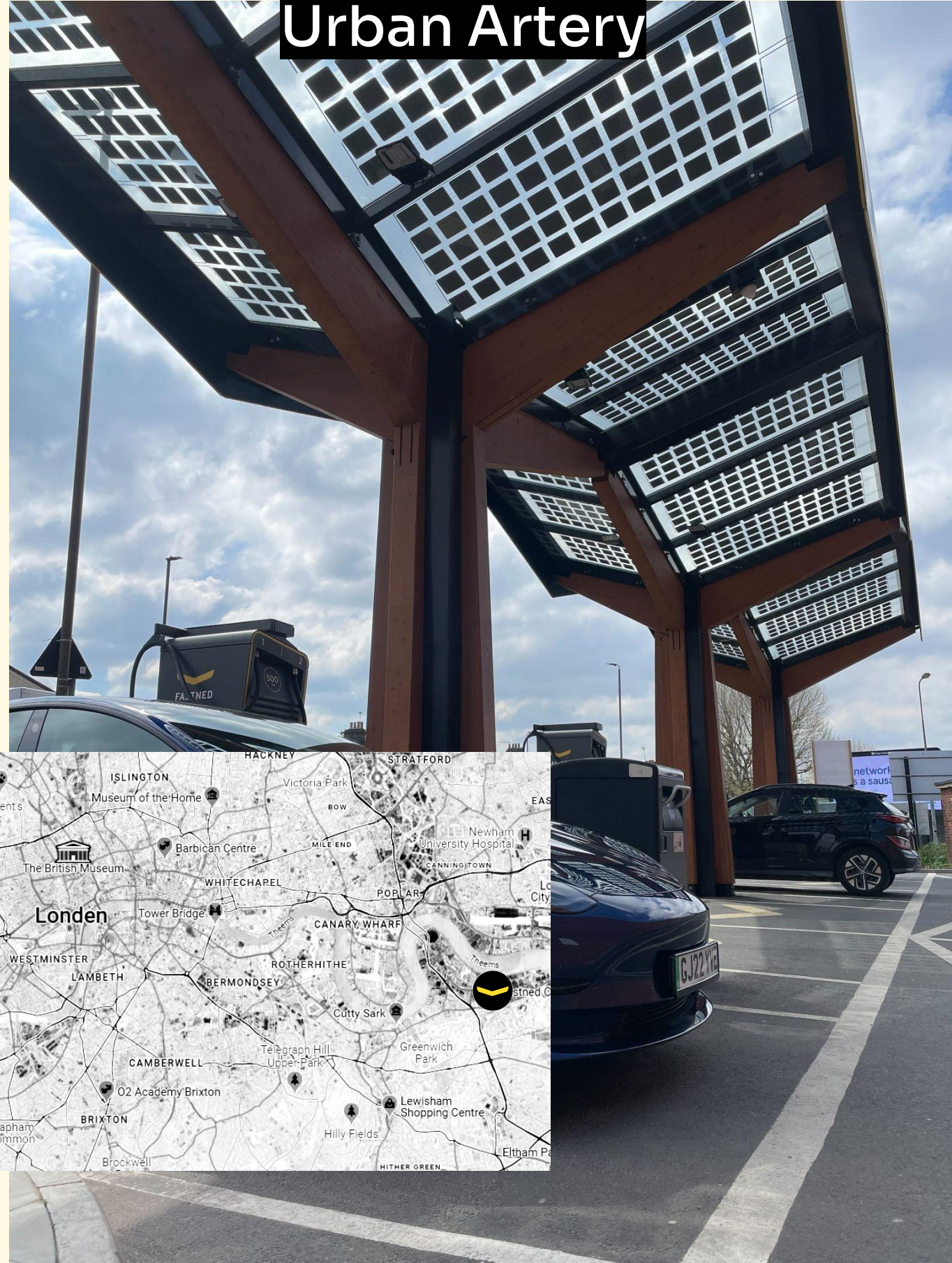
**Highways  
Major corridors**





# Ramac Way

Urban Artery



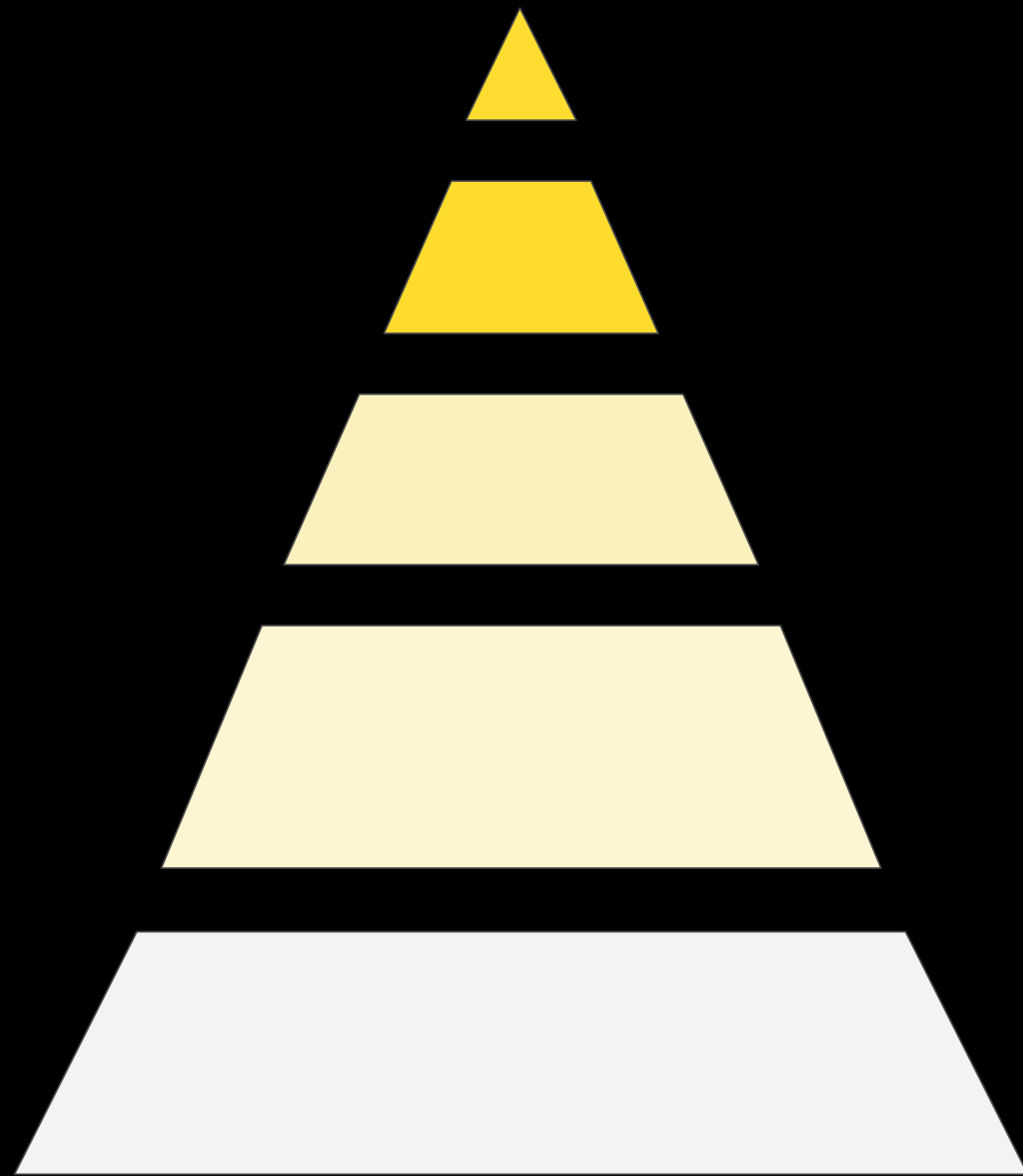
# Palace Grounds

Off-highway Junction





# Location availability



**On highway**

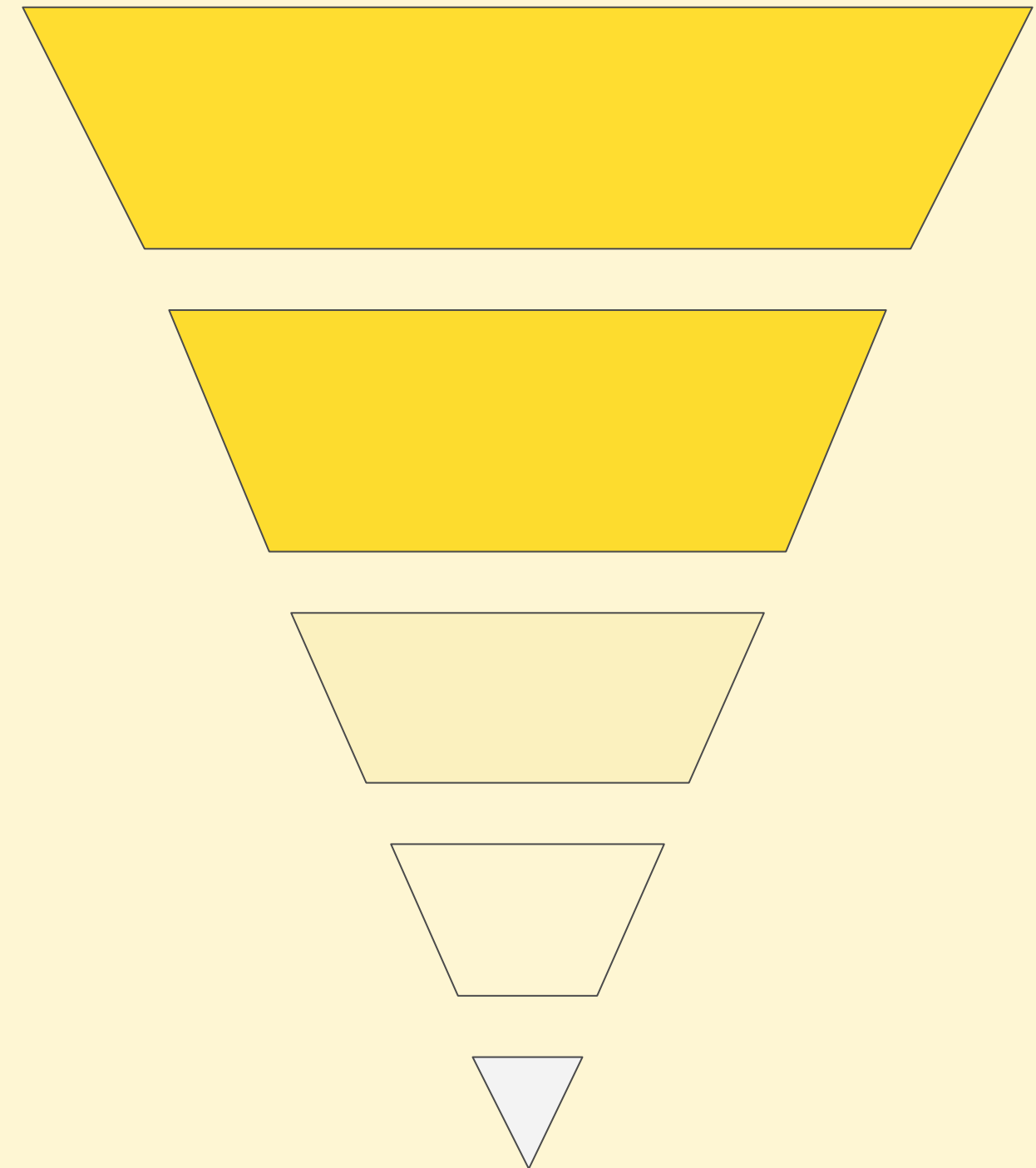
**Highway exits**

**National roads**

**Urban roads**

**Other & destination**

# Portfolio ambition





# The role of governments is key

## Benefits of public, open & transparent tenders

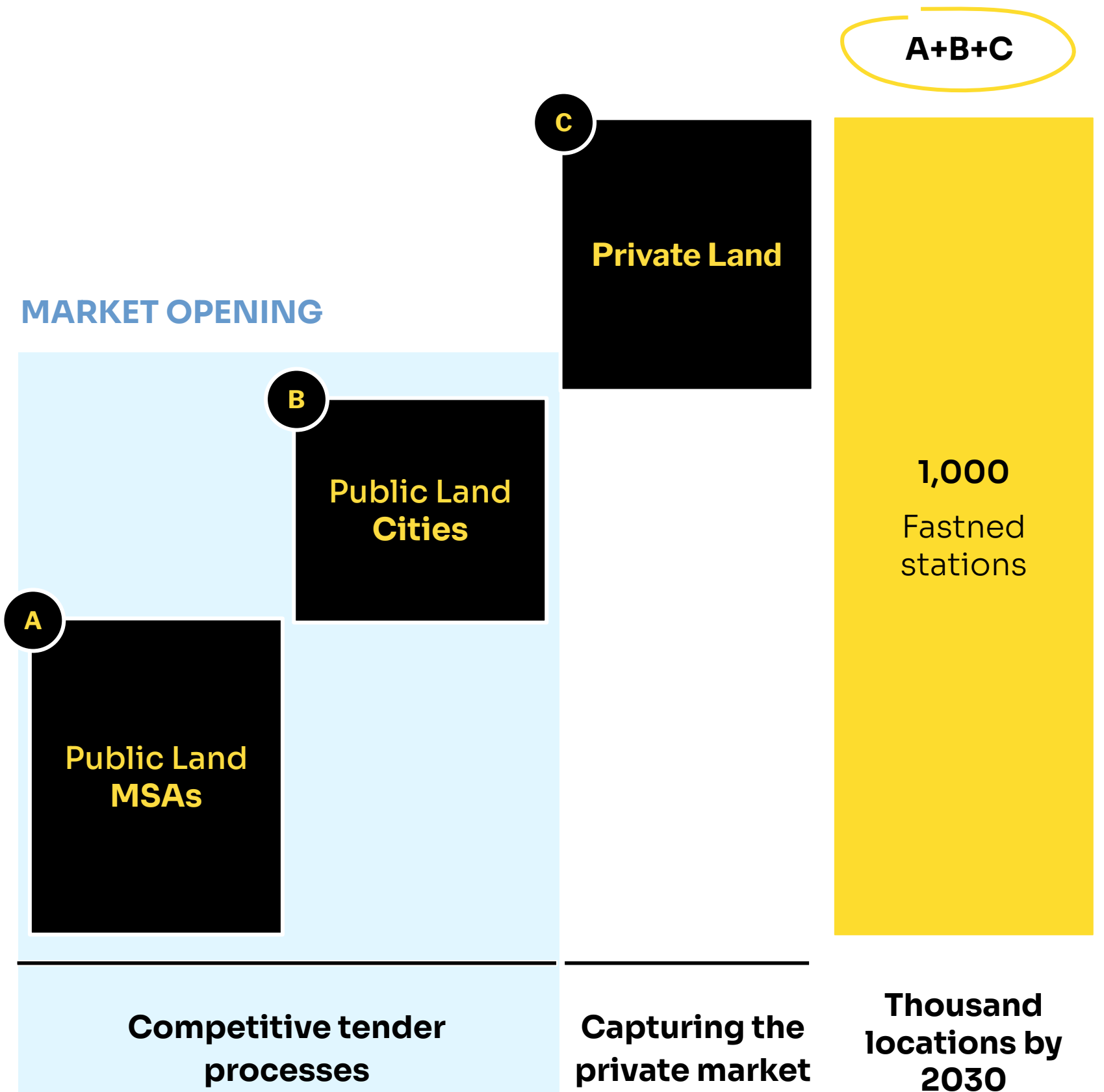
Tenders have **qualitative evaluation** criteria that parties compete on

Tenders create an **open and competitive market** for all interested parties

Tenders are shown to deliver **better results**: larger charging stations with more and faster chargers

Tendered stations are being built in a **shorter amount of time**, with better uptime and a better customer experience

Tenders secure CPOs with **long contracts** to allow for sizable **long term investments**





# What defines a valuable location

1

Locations where drivers have a natural **high need for charge**

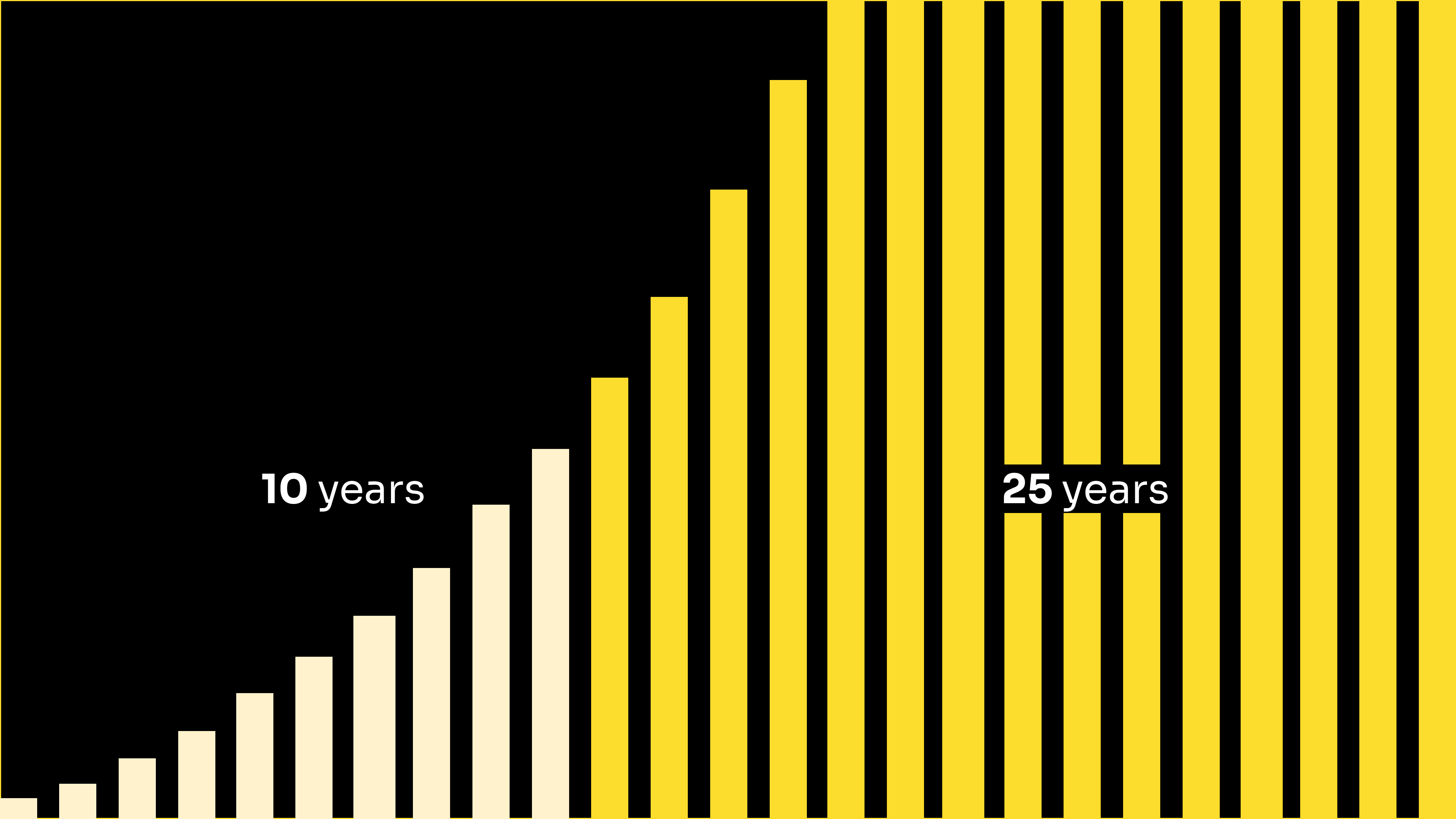
2

Locations with **long-term contracts**

3

Locations that are **visible, accessible, and scalable**





**10 years**

**25 years**



# What defines a valuable location

1

Locations where drivers have a natural **high need for charge**

2

Locations with **long-term contracts**

3

Locations that are **visible, accessible, and scalable**



# Visible, accessible, scalable







# Our focus on **quality** brings results

**Best charging network in the UK**



EV CHARGING NETWORKS RANKED: 2022		ZAP MAP®		
Rank	EV Network	Overall Rating*	Star Rating**	Rank 2021
#1	FASTNED	4.0	★★★★★	n/a
	mfg	4.0	★★★★★	2
#3	INSTAVOLT	3.9	★★★★★	1
...				
#6	IONITY	3.5	★★★★★	7
...				
#18	Shell Recharge	2.8	★★★★★	5
#19	GeniePoint	2.4	★★★★★	11
#20	bp pulse	2.3	★★★★★	16
#21	charge your car	2.0	★★★★★	17

**Autocar survey:  
Highest reliability in the UK**

vs. competition hovering at 80-90%<sup>1</sup>

**100%**



# End of training

1

Locations where drivers have a natural **high need for charge**

2

Locations with **long-term contracts**

3

Locations that are **visible, accessible, and scalable**



# The service area of the future



**Maria Garcia**  
Director Location Design



# Gentbrugge Noord & Gentbrugge Zuid





# The **mindset** behind our design principles

How to design the service area of the future



# Fastned builds **today** the charging stations of the **future**

We secure long term contracts: 15-20+ years

We are at day 1 of electric vehicle adoption



**Customer  
Experience**



**Think**

**B I G**



**Station  
Performance**



**Modularity**



Customer Experience



Station Performance

Modularity



Most advanced electric cars today can charge

**200 Km range**  
**in <9 min**





Drive-through stations ensure the most efficient traffic flow, resulting in **maximum utilisation** per charger





**A recognisable  
design attracts  
customers**

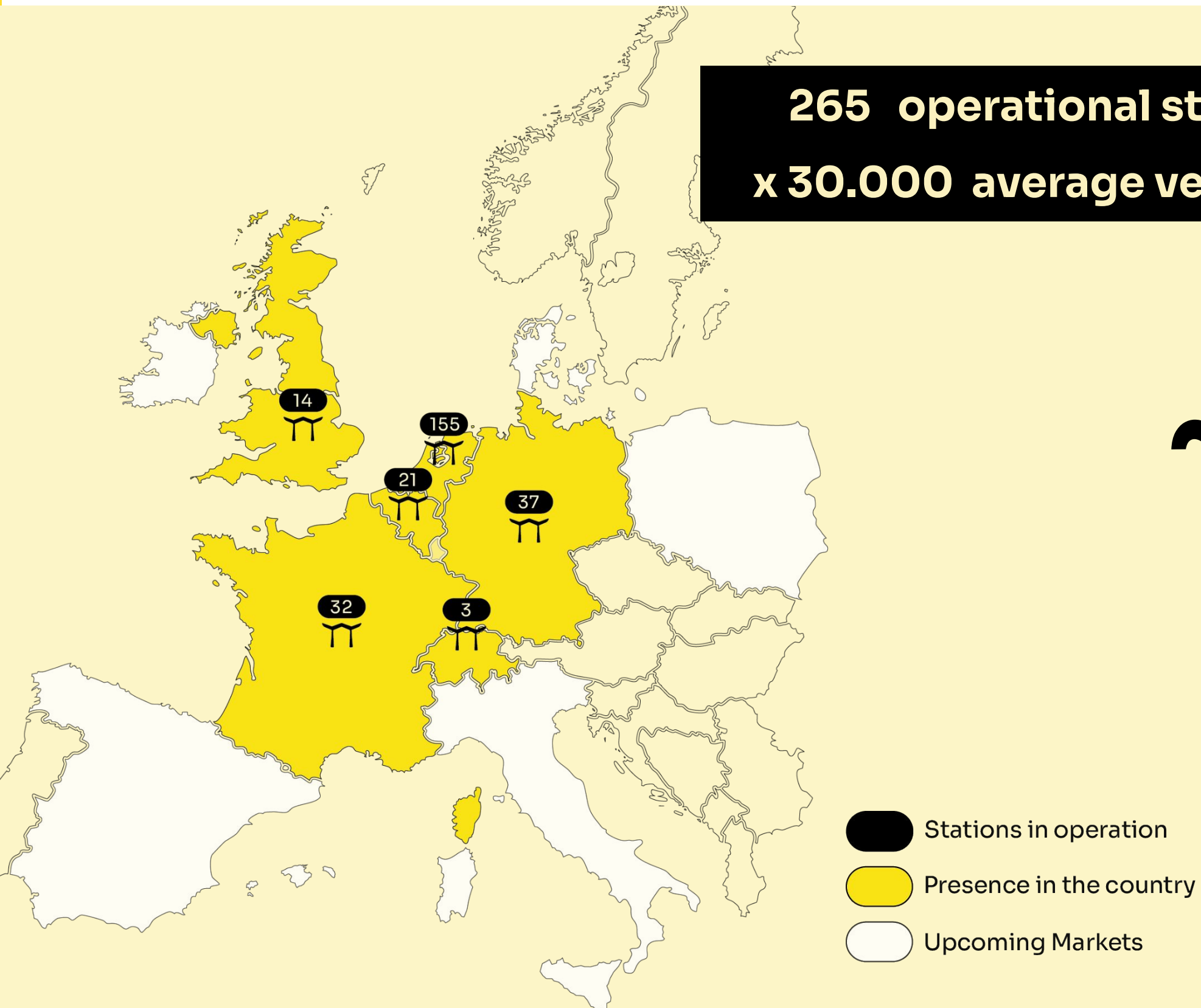




**Our eye-catching stations are seen by  
~8 million people per day**

**265 operational stations  
x 30.000 average vehicle/day/location**

**~8 million  
people per day**





**We invest in recognisable and iconic canopies**

**We build a **BRAND****





Customer  
Experience



Station  
Performance

2

Modularity

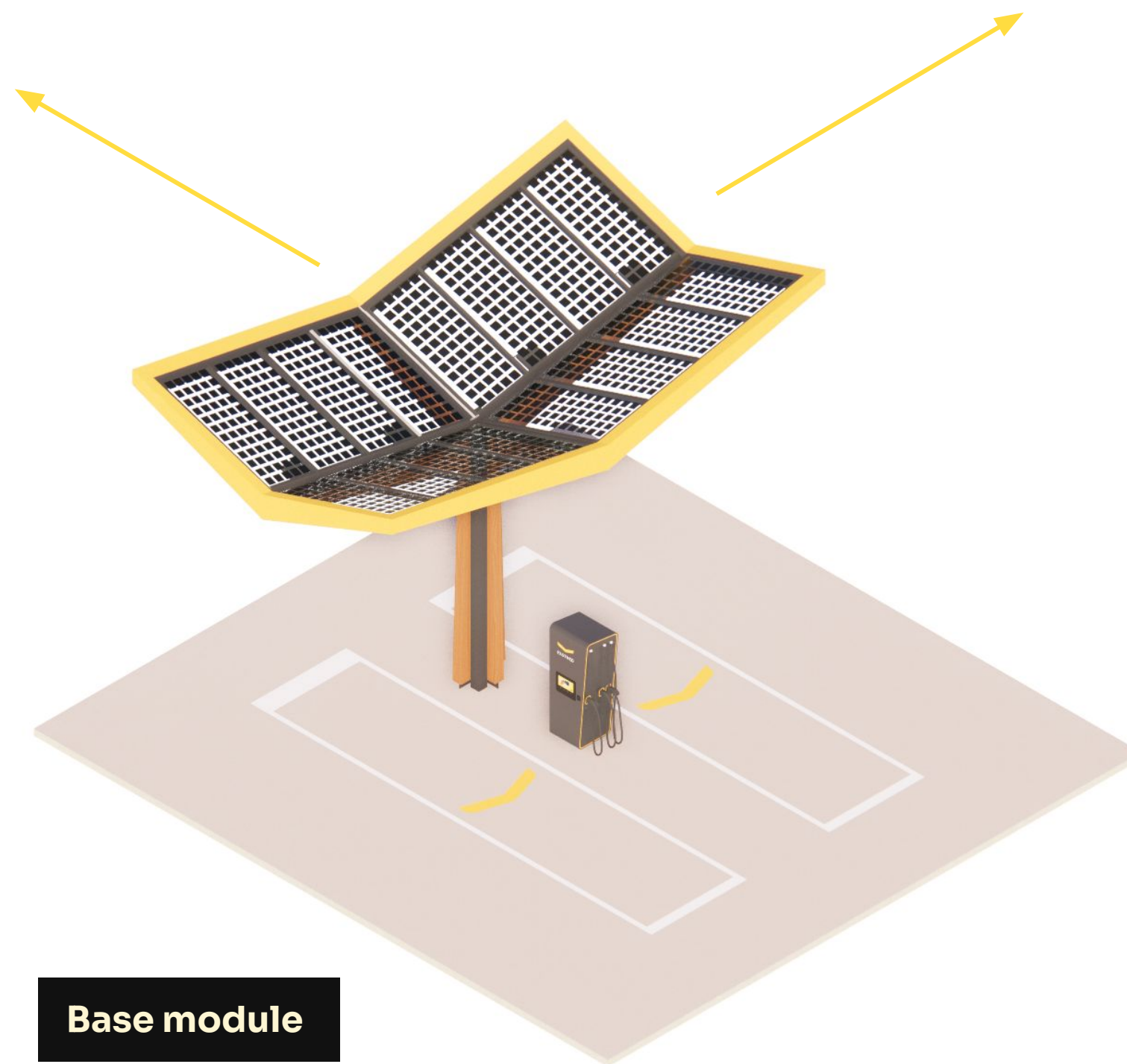


**Modularity increases  
cost efficiency and  
building pace**





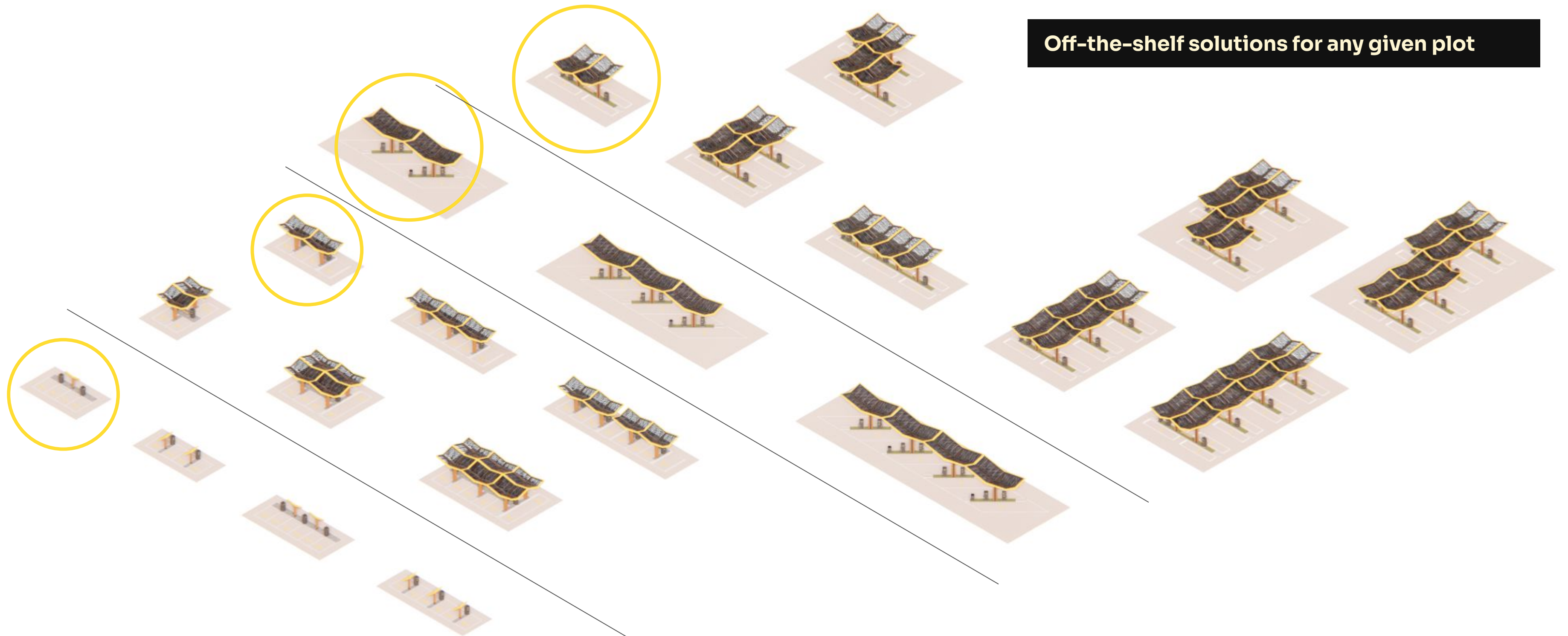
# Thanks to repetition, modular architecture reduces construction costs





# 4 primary models allow >20 different configurations

Off-the-shelf solutions for any given plot





**Modularity also  
supports growth**

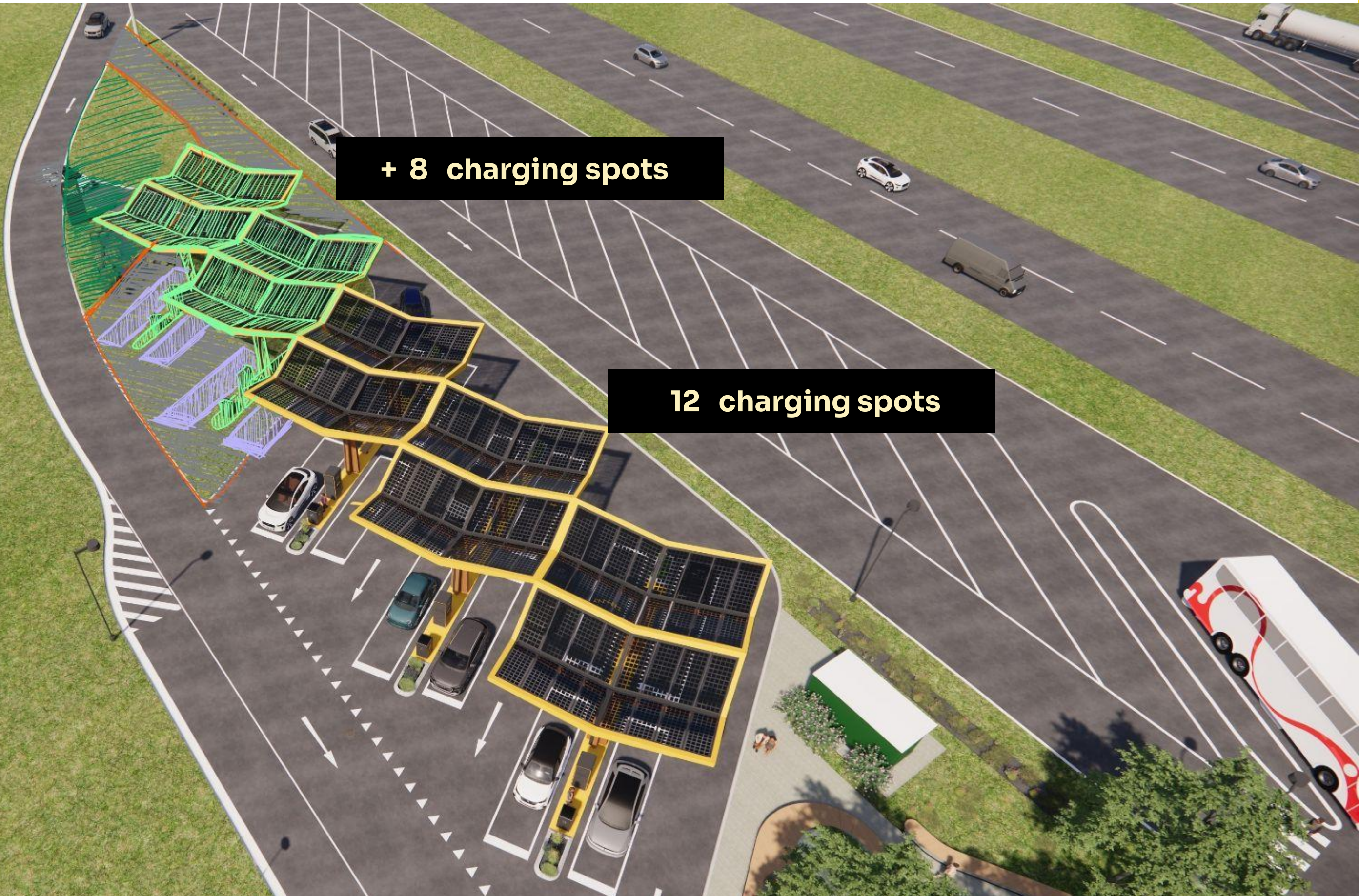




# Fastned stations are designed to **expand capacity** over 2 axes

1. Increase **#charging spots**

2. Increase **nominal power**



+ 8 charging spots

12 charging spots



**Customer  
Experience**

**3**



**1**

**Station  
Performance**

**2**

**Modularity**



# Fastned is leader in customer **satisfaction**

Net Promoter Score >50 and Google rating 4.4/5 stars  
The highest rating in our segment





# Most reliable and welcoming experience for all drivers...

**Uptime 99%**



**Accessibility**



**Ease of use**



**Social safety**





# ...and any electric vehicle

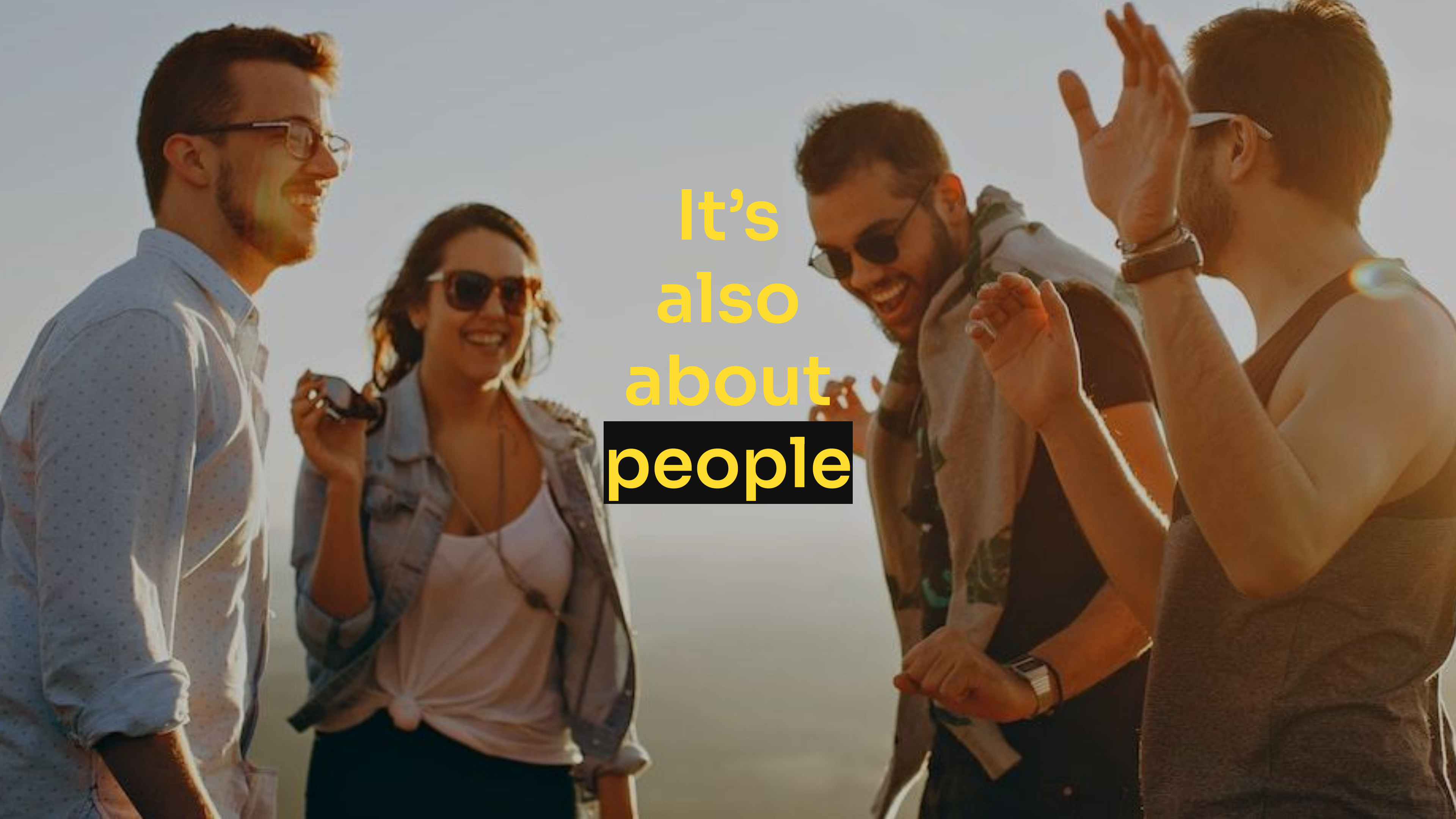
Vehicles with a caravan



Electric Trucks







It's  
also  
about  
**people**



# Retail contributes to the **most attractive** charging concept

A new business stream that reinforces our mission





# Fastned retail concept will cover **all customer needs** at our stations

Premium food and drinks



Qualitative sanitary facilities



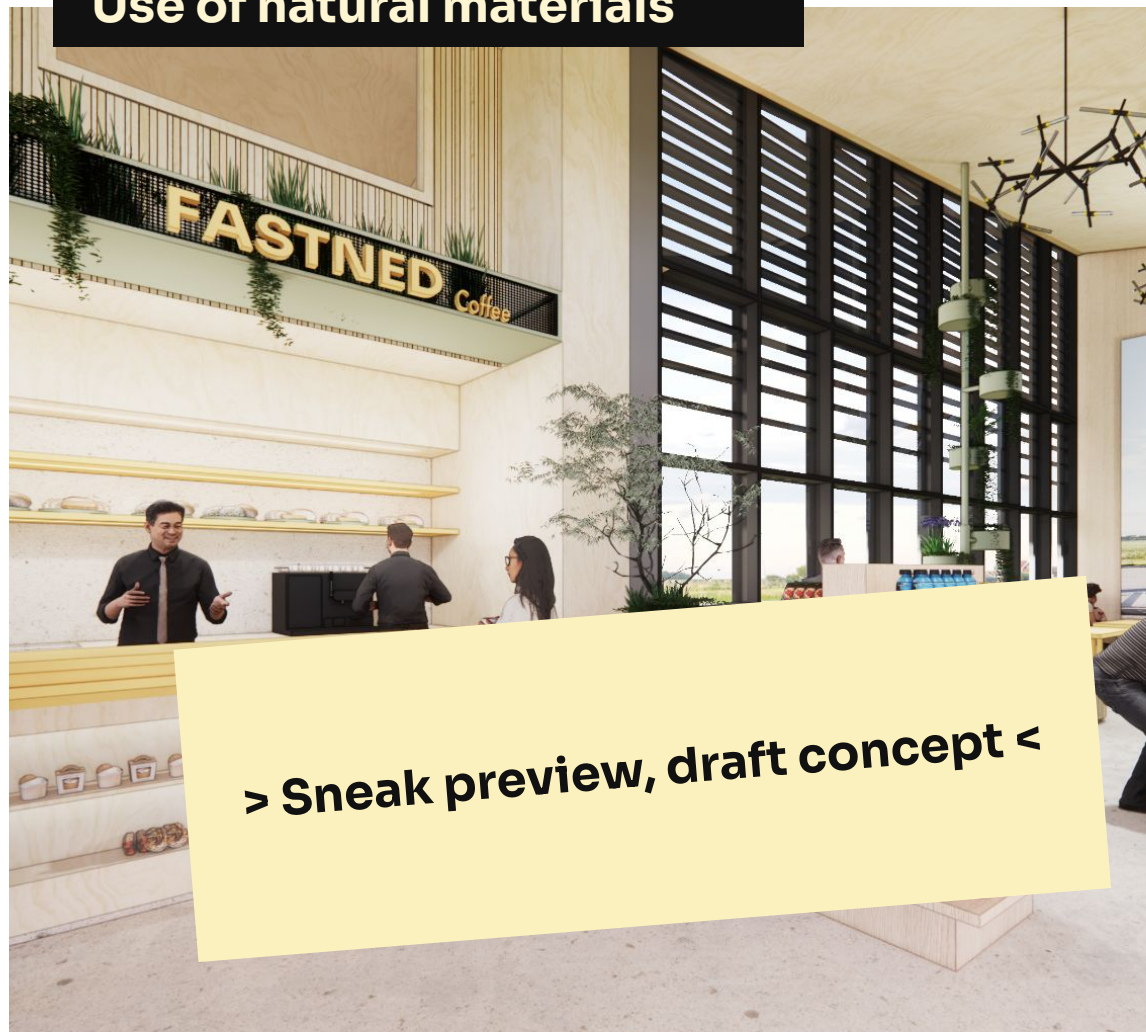
Innovative services





# An environment that has a positive impact on the **well-being** of our customers

Use of natural materials



Playgrounds for kids and adults



Greenery and natural drainage







**make  
people  
come back**



# Three retail projects in parallel tracks

**1** Brecht,  
Belgium

**First retail project  
(renovation)**

**in construction**

**2** Germany  
and Belgium

**Pilot multiple  
small amenities**

**in development**

**3** Gentbrugge,  
Belgium

**First flagship  
retail concept**

**in development**



Gentbrugge will be the first **full Fastned-branded** experience





**Our charging stations in  
Gentbrugge will be  
operational in 2025**



**With a “Think BIG” mentality,  
Fastned leads the evolution  
of fast-charging stations**





Laden  
Tol  
Bespreek  
Tol

De  
beperkte  
range.  
Hallo  
scheep!



















**Questions?**