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Accenture
Industry X

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Embrace change. Unleash innovation.

We are a **global professional services** company with leading capabilities in digital, cloud and security. Accenture provides services and solutions across more than 40 industries in five industry groups. This **industry focus** gives Accenture's professionals a thorough understanding of industry evolution, business issues and applicable technologies, enabling us to deliver innovative solutions tailored to each client.

$61.6B
Annual Revenues

22%
Total Shareholder Return CAGR (5FY)

721k people serving

>6,000 clients in

>120 countries

91
of the Global
FORTUNE 100
are Accenture clients

75%
of the Global
FORTUNE 500
are Accenture clients

97
of our top
#100
have been our clients for at least 10 years

15
Consecutive years

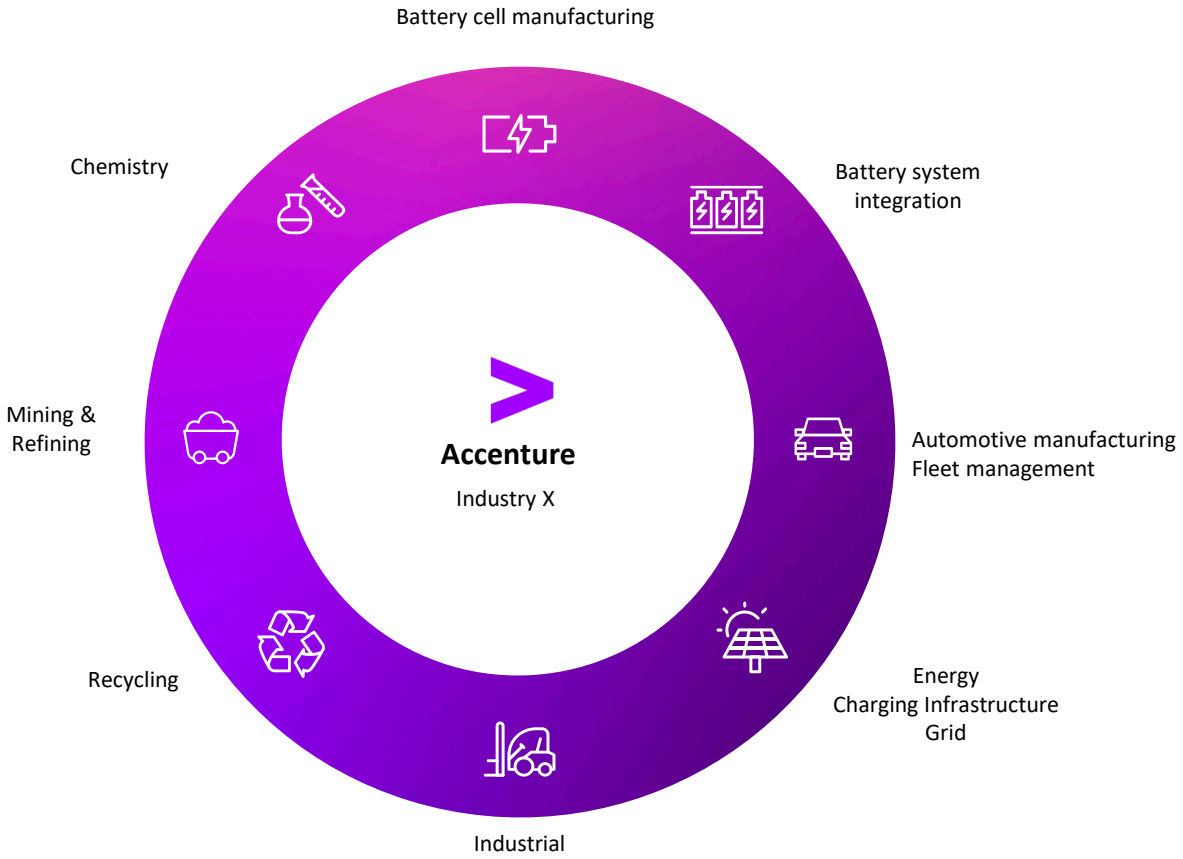
Dow Jones Sustainability Index FTSE4Good Global Index

#2
For 2 consecutive years

Barron's Most Sustainable International Companies

Industry X in the eMobility and Battery Ecosystems

Our role: we provide 360° value with professional services across all relevant industries



We offer technical advisory and engineering in order to…

1. Address the **needs of the battery industry** and add value

This is only possible with in-depth industry knowledge and functional capabilities.

2. Provide the **engineering resources** needed to build this industry

Deliver projects with battery experts and other specialized industry professionals.

3. Drive the **digital transformation** of the battery business

Use the power of data to reimagine batteries and how we make them.

4. Accelerate a **sustainable growth** of the technical ecosystem

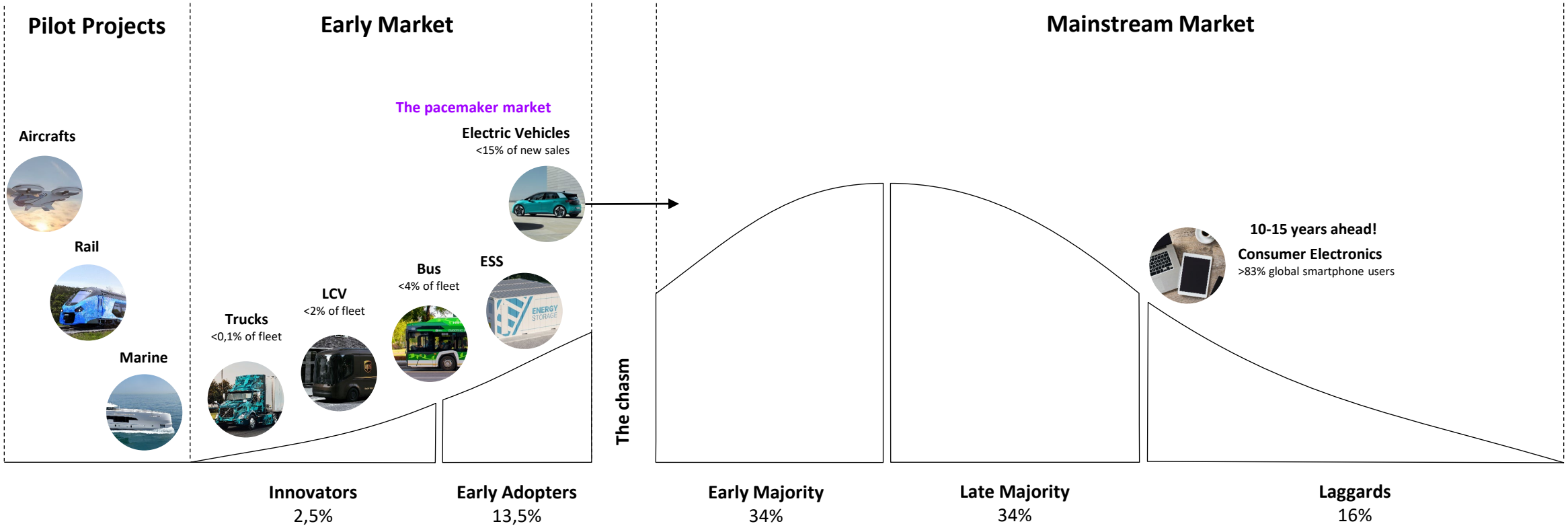
Optimized asset management will lead to cheaper and more sustainable batteries.

5. Strengthen the **industrial interfaces** in the battery world

Understand the perspectives of all stakeholder and manage information.

Battery Technology Adoption

Main categories: portable electronics, electric mobility & stationary energy storage systems



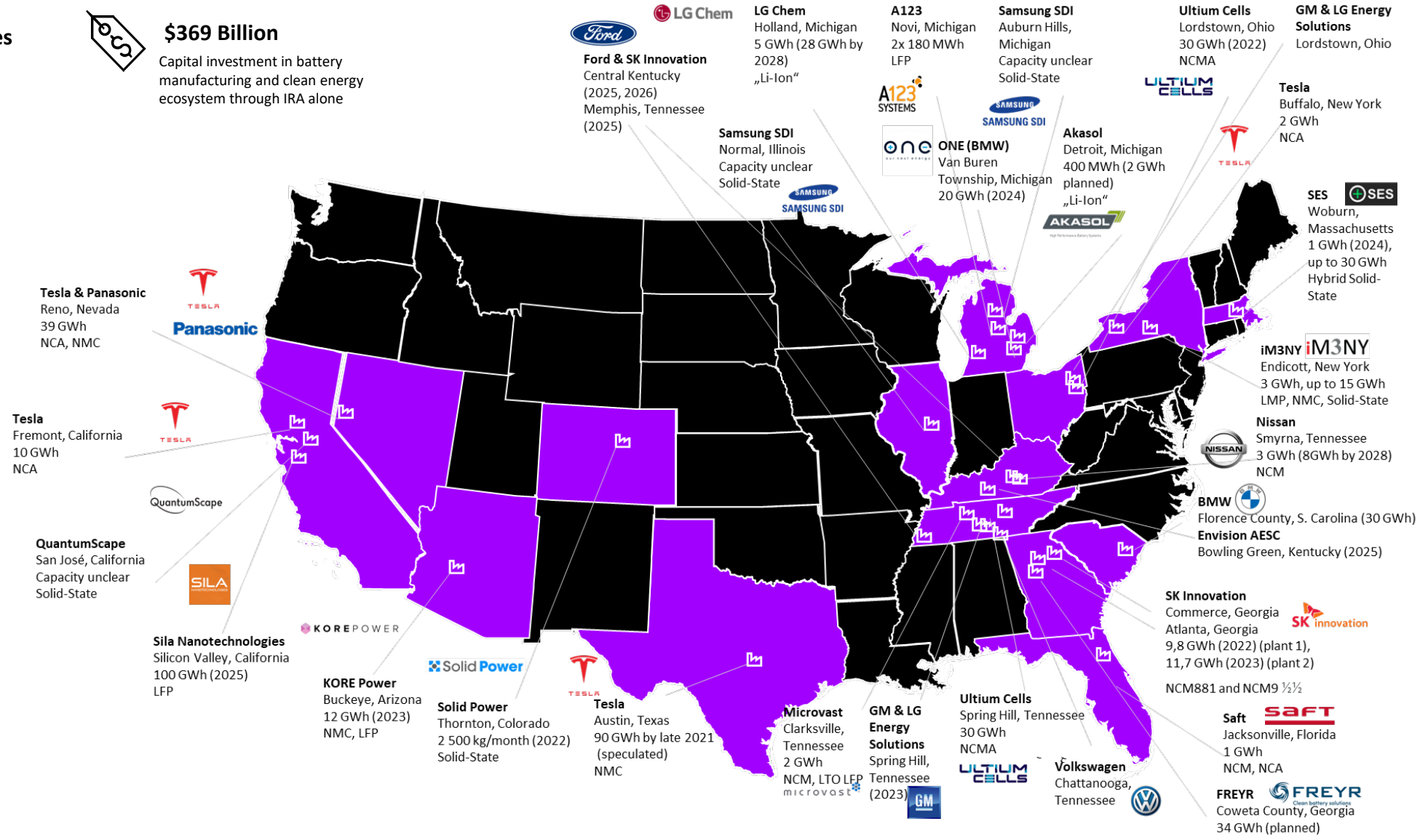
Source: Bohlen & Beal, "The diffusion process"; LCV = light commercial vehicle; ESS = energy storage systems

Battery Cell Production in the US

~40 Gigafactories
Projects made public

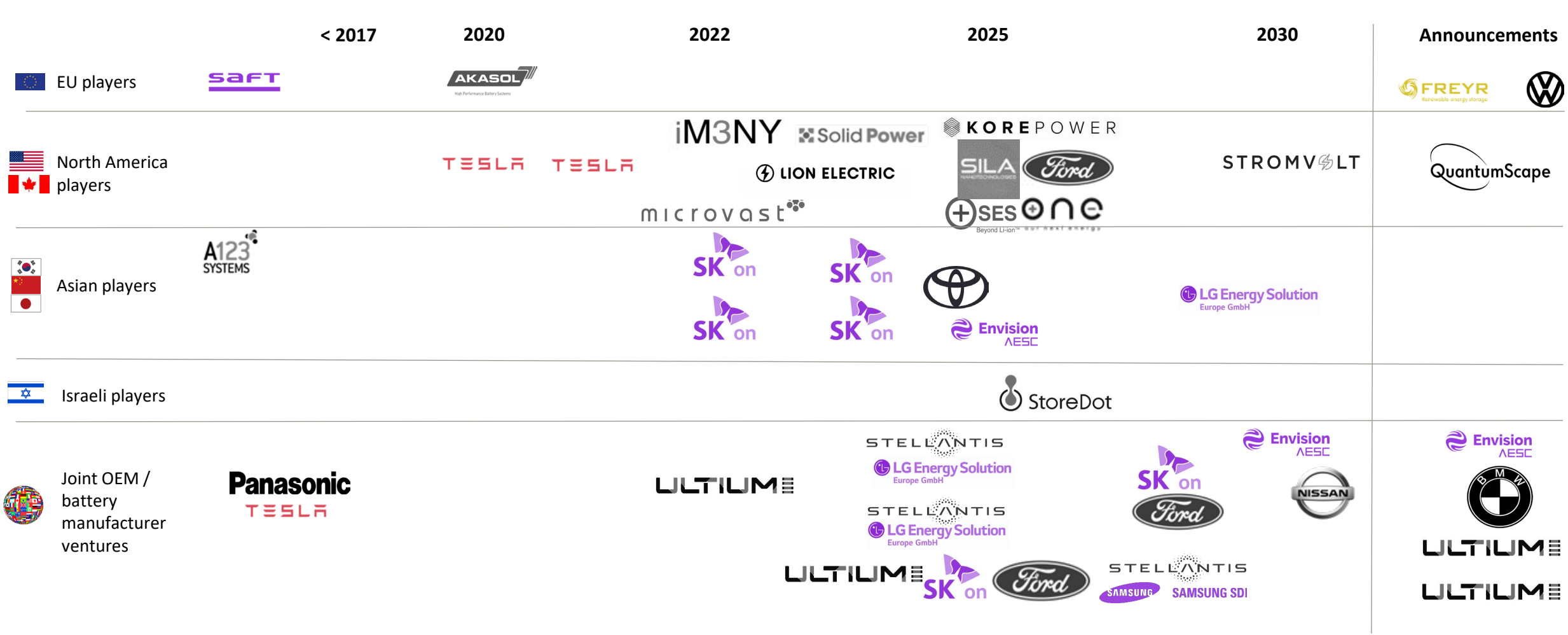
$369 Billion
Capital investment in battery manufacturing and clean energy ecosystem through IRA alone

>670 GWh/a
Announced production capacity for 2030



North American Gigafactories

Market entry timeline for battery cell manufacturers



Beneficiaries:

Consumers

$7500 tax credit for purchasing an EV

Fleet Management Companies

Tax credit equal to the lesser 30% or incremental cost with a comparable ICE vehicle (caps at $7500 or $40,000 depending on vehicle weight)

Automotive OEMs

$2 billion in grants, $20 billion in loans for clean vehicle manufacturing

Clean energy manufacturing companies:

$60 billion, 5-year production tax credit

Battery mineral & material processing companies

Up to 10% tax credit

Cell Manufacturers & Battery Material Processing Companies

Up to 10% tax credit and 35 USD/kWh

Inflation Reduction Act (IRA)

Passed August 16, 2022, the IRA allocates $369 billion for climate and clean energy projects and policies with an emphasis in stimulating domestic production of EVs and their batteries.

Solutions to Meet IRA Requirements

Strategies for OEMs, cell manufacturers, and battery manufacturers:

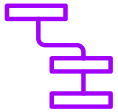
1. Battery Passport

- Track battery materials
- Report battery materials for IRA eligibility
- Maintain EVs' eligibility for tax credits

2. Battery Recycling

- Incorporate battery recycling into battery manufacturing facilities to become eligible for additional funding and loans
- Recycled battery materials count toward domestically sourced materials when incorporated into new batteries

3. Vertical Integration

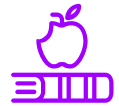


- Companies looking to produce EVs eligible for tax credits can complete M&As to secure battery materials and expertise

4. Partnerships

- Companies and organizations seeking eligibility for funding can partner to ensure stable supply chains for short and long-term benefit
- Expertise can be shared across different industries to transition to clean energy eligible enterprises

5. Workforce Training



- With limited specialized talent in clean energy industries, investment in workforce training increases talent pool
- Focused trainings in sustainability expands problem solving methodology and ideation

Unique Challenges for US Battery Manufacturing

The US is an emerging market battery manufacturing and raw material sourcing and processing.

Supply Chain

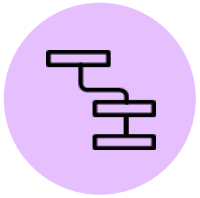
- The US currently lacks enough material mining and processing to reach IRA requirements

National Security

- The US declared battery industry development as a strategic interest.

Joint Ventures

- Established industry is transitioning to meet IRA requirements, increasing partnerships between OEMs and battery manufacturers



Vertical and Horizontal Integrations

- Companies are needing to vertically and horizontally integrate to secure limited supply chain and talent