

Welcome!



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Hyliion**



**Colin Messer, Director
Land of Enchantment Clean Cities**

Sponsored by:



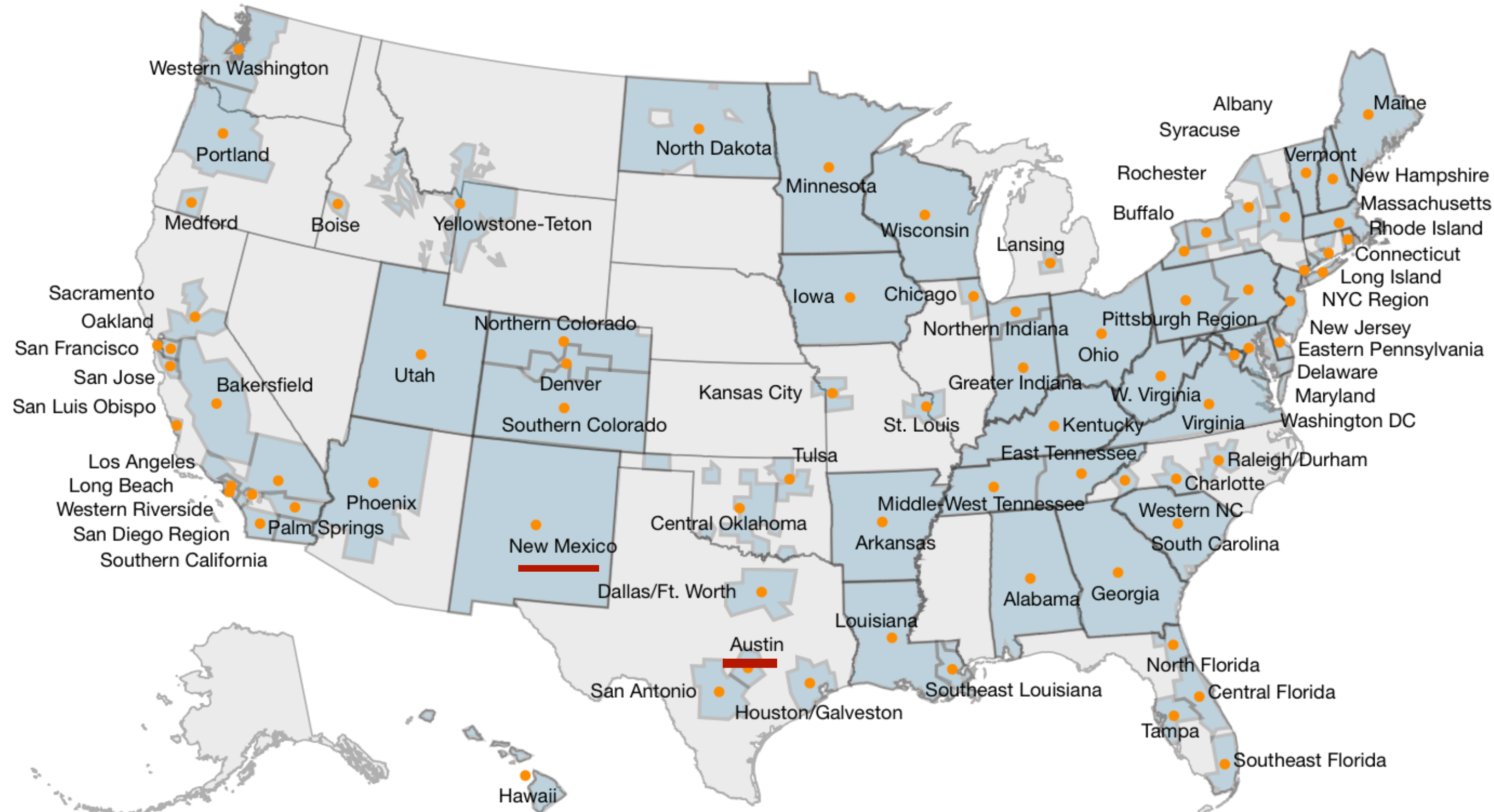
In Partnership with:



**Land of Enchantment
Clean Cities Coalition**



Clean Cities Nationwide Network



- The national network of ~ 100 *Clean Cities* coalitions brings together stakeholders to support:
- Alternative and renewable fuels: biodiesel, ethanol, electricity, hydrogen, natural gas, propane
- Idle-reduction measures
- Fuel economy improvements
- Energy Efficient Mobility Systems:
 - Connected vehicles
 - Ride-hailing & ride share services

ONE Gas, Inc. is a natural gas distribution company and the successor to the company founded in 1906 as Oklahoma Natural Gas Company, which became ONEOK, Inc. in 1980.

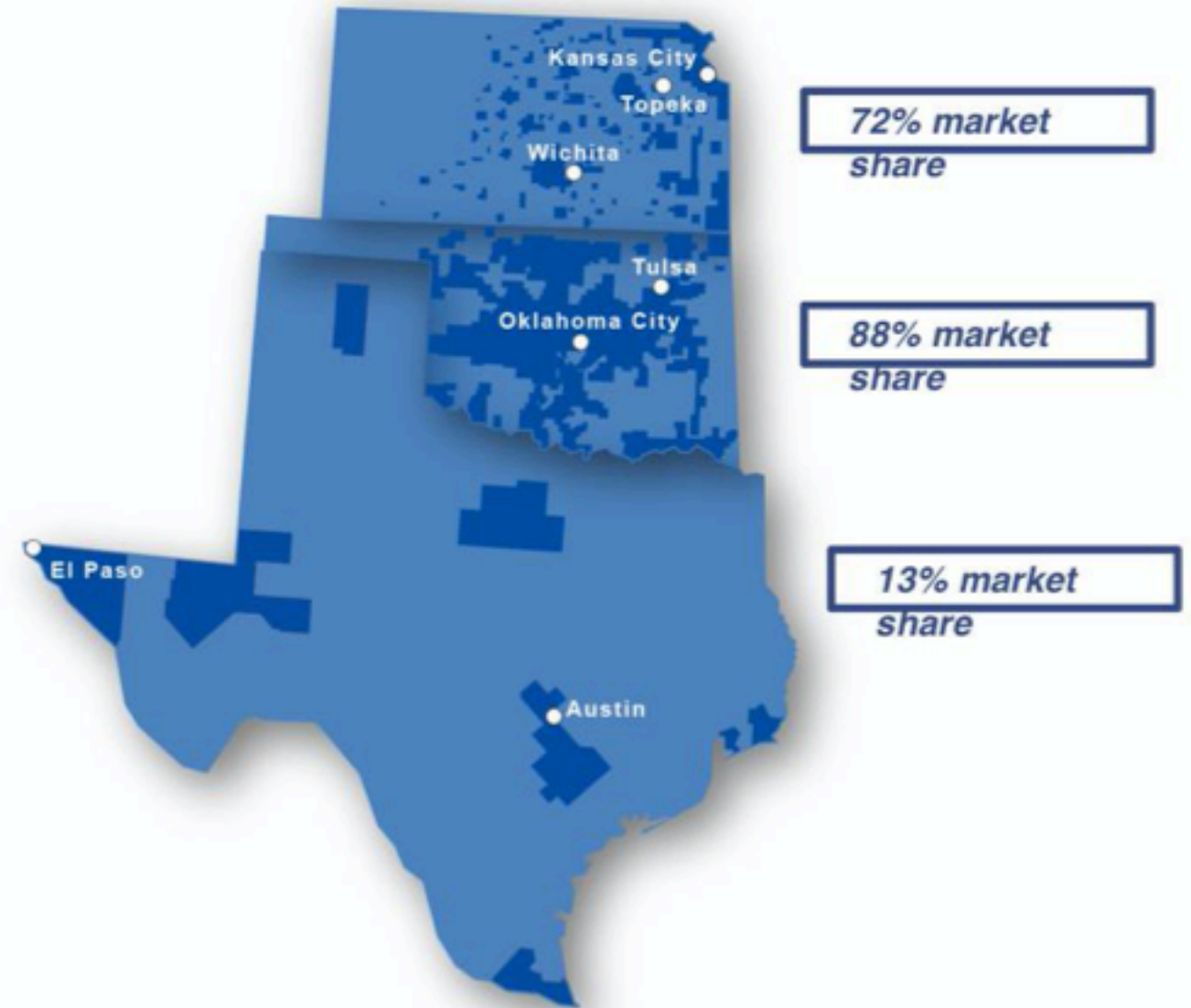
On January 31, 2014, ONE Gas officially separated from ONEOK into a stand-alone, 100-percent regulated, publicly traded natural gas utility.

ONE Gas provides natural gas distribution services to more than 2 million customers in Oklahoma, Kansas and Texas. ONE Gas is headquartered in Tulsa, Okla., and its divisions include Oklahoma Natural Gas, the largest natural gas distributor in Oklahoma; Kansas Gas Service, the largest in Kansas, and Texas Gas Service, the third largest in Texas, in terms of customers.

Its largest natural gas distribution markets by customer count are Oklahoma City and Tulsa, Okla.; Kansas City, Wichita and Topeka, Kan.; and Austin and El Paso, Texas. TGS, also serves the RGV, Galveston, Port Arthur, Weatherford, and Borger areas. ONE Gas serves residential, commercial, industrial, transportation and wholesale customers in all three states.

Key Statistics

- One of the largest publicly traded natural gas distribution companies
 - 2.2 million customers
 - ~3,500 employees
 - ~61,400 miles of distribution mains, services and transmission pipelines
- Texas Gas Service is the third largest natural gas distribution company in Texas, providing clean, reliable natural gas to more than 663,000 customers in 100 communities. Our business is supplying energy that improves the quality of life for our customers and helps communities thrive and grow.





ONE Gas

Renewable Natural Gas



What is RNG?

The basics of Renewable Natural Gas



Capture biowaste from dairies, farms, landfills and waste water treatment plants



Convert into biogas (anaerobic digestion, etc.)



Process the biogas to make it pipeline-ready (biomethane)



Inject the biomethane into the pipeline for future use

Definitions to Know

Key terms defined

Renewable Natural Gas

methane produced from renewable sources like digested organic waste and gasified biomass

Renewable Gas

can be renewable natural gas or hydrogen gas produced from Power-to-Gas.

Biogas

a biofuel that is naturally produced from the decomposition of organic waste.

Biomethane

biogas that has been cleaned to pipeline standards and converted to biomethane, which is renewable gas.

American Gas Foundation: 2019 RNG Study

The American Gas Foundation sponsored a study in 2019 assessing feedstock availability, production potential, and emission reduction impact of processing and deploying renewable natural gas.

- More than enough renewable resources to produce RNG in years to come: The study's high resource potential scenario estimates that 4,450 trillion BTU of RNG will be available by 2040. (based on three RNG production technologies: anaerobic digestion, thermal gasification, and power-to-gas).
- RNG deployment could achieve 110 to 260 MMT of CO₂e emission reductions by 2040; under the high resource scenario this equates to 95% reduction of emissions associated with natural gas consumption in the residential energy sector.
- Cheaper decarbonization option: study estimates that the cost of emission reductions referenced would be between \$65/ton to \$200/ton of carbon for a majority of the RNG deployed.

RNG and CNG

Put into Perspective, RNG as a Transportation Fuel is ...



Lowering greenhouse gas emissions equivalent to removing **1,539,565** gasoline passenger cars from our roads for one year



Reducing CO₂ emissions equivalent to **815,950,377** gallons of gasoline or **712,313,458** gallons of diesel consumed.



That's equal to the total energy used by **868,321** U.S. homes for one year



Avoiding greenhouse gas emissions equivalent to running **1,537** wind turbines for one year



or replacing **275,434,003** traditional lightbulbs with LEDs



Sequestering carbon equal to growing **119,902,624** tree seedlings for ten years



or **8,534,274** acres of U.S. forests for one year

Note: Assumes 7,251,351 metric tons of CO₂e reduced over last five years through increased RNG usage calculated using CARB's LCFS carbon intensity numbers. GHG equivalency results calculated using the U.S. EPA's calculator.

THE COALITION FOR
**RENEWABLE
NATURAL GAS**



This 2018 on-road RNG use report was issued by NGV America and the Coalition for Renewable Natural Gas, April 2019.

Find out more at
RNGCoalition.com or NGVAmerica.org.

NGV AMERICA

Natural Gas Vehicles for America

RNG Challenges

If RNG is so great what is standing in our way?



Underestimating supply.

AGA study indicates the potential to replace over 80% of all residential natural gas consumption with RNG by 2040



Gas quality assumptions.

Technology is available to clean up RNG and make it interchangeable with the geologic natural gas in our pipelines



Infrastructure challenges.

Allowing utility investment is needed to take advantage of RNG benefits for OK customers and communities



Few legislative incentives.

Legislation is needed to help drive RNG market and highlight it as a viable option for GHG emission reduction goals

Questions?





HYLIION

CLASS B ELECTRIFICATION



MISSION

Be the leading powertrain provider of electrified solutions for the commercial vehicle industry



LOWEST COST OF OWNERSHIP



NET-NEGATIVE EMISSIONS



EXISTING INFRASTRUCTURE



SUPERIOR VEHICLE PERFORMANCE



FASTEST PATH TO MARKET

HYLIION INTRODUCTION

HYLIION OVERVIEW



- Electric powertrain, battery systems, and software solution provider focusing on Class 8 market
- Founded 2015
- Over 2,000,000 miles proven over the road with the hybrid solution

HYLIION RECENT FINANCING

- Hyliion will merge with Tortoise Acquisition Corp. in Q3-2020 (NYSE: SHLL → HYLN)
- Capital available to Hyliion through merger: \$560M
- Post-funding expected Enterprise Value: ~\$1.1B
- Hyliion retains majority ownership

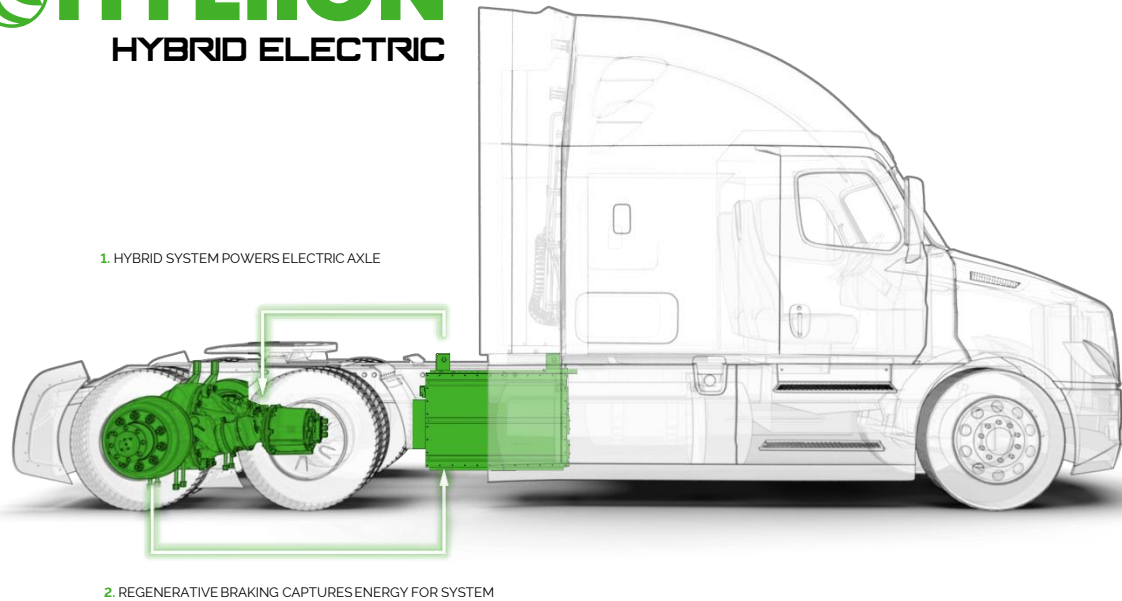


AGILITY PARTNERSHIP

- Agility will act as Hyliion's Hypertruck ERX launch partner based on their 1,000-unit pre-order
- Agility is global leader in logistics solutions



HYLIION[®] HYBRID ELECTRIC

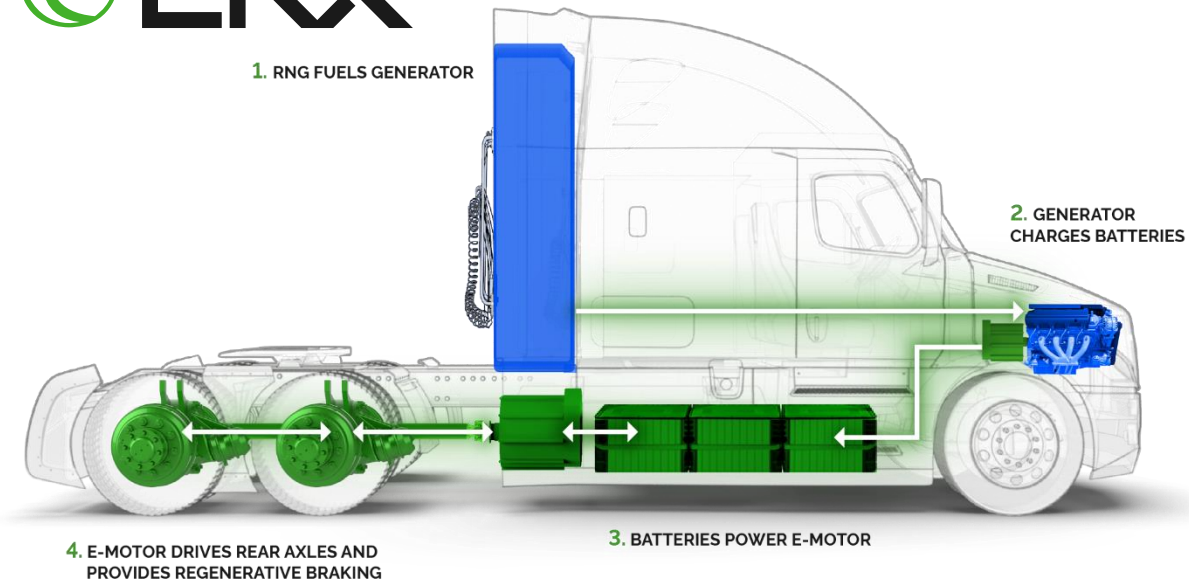


HYBRID POWERTRAIN OVERVIEW

- 5-10% fuel savings in hilly terrain
- 12+ hours in-cab climate control
- 120HP and 1,500 ft-lb of torque from e-axle

Hybrid MRSP: \$29,000
 New Truck: +\$14,000
(over base spec)

HYPERTRUCK[™] ERX



ERX POWERTRAIN OVERVIEW

- 35% reduction in lifetime TCO
- Net-negative GHG emissions
- Over 1,000-mile range
- Up to 25 miles of EV range or 34+ hr. APU time

Powertrain MRSP: TBD
 New Truck: ~\$220,000

HYBRID ELECTRIC

 **HYLIION**



HYBRID ELECTRIC THE TECH SOLUTION OF TODAY

OEM COMPATIBLE



DEPLOYED WITH CUSTOMERS TODAY



FUEL SAVINGS



APU - NO IDLING



POWER ASSIST



ADVANCED ALGORITHMS



DATA ANALYTICS

HYBRID DIESEL

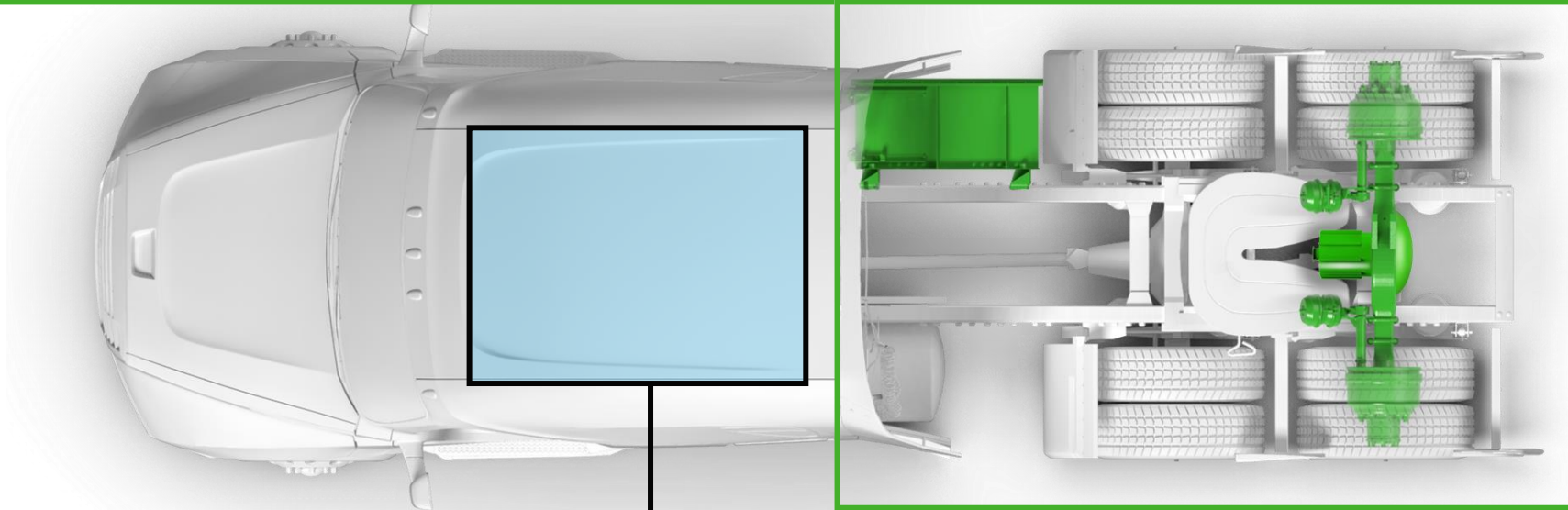
REDUCES DIESEL FUEL USE

- 5-10% fuel savings based on terrain conditions
- 120HP and up to 1,500 foot-lbs of torque
- Provides torque to reduce diesel fuel usage

HYBRID CNG

POWER ASSIST FOR HILLS

- Adds 120HP to 400HP 12L Cummins
- Faster climbs, diesel-like performance
- Safer and improved driving experience



AUXILIARY POWER UNIT

Eliminate Engine Idling

- 12+ hours of run time
- A/C with over 10,000 BTU
- In-Cab control unit
- 400-pound weight exemption

BENEFIT

Provides climate control and 'hotel' power for the entire mandatory rest period, eliminating engine idling

D. RIVERS

Go to HyDrive

CURRENT TRIP:
5.2 MILES
0.0 MPG

APU CONTROL

PREP

CHARGE TIME: **0 HRS**

POWER

HYPOINTS

0 % **THROTTLE** **0 PTS**

COASTING **0 PTS**

BRAKING **0 PTS**

GRACE PERIOD **- 0 PTS**

0 TOTAL

ECO SCORE: 100 %

Best Fuel Savings

Good Fuel Savings

Moderate Fuel Savings

Not Optimal For Long Haul Fuel Savings



The Hyliion fuel-savings algorithm performs best in hilly terrain.

MORE POWERFUL CNG

CNG trucks are **underpowered** compared to diesel equivalents.

The Hyliion CNG algorithm **intelligently stores energy** on flats and downhills and deploys **up to 120HP boost** when needed for key climbs and heavy loads.

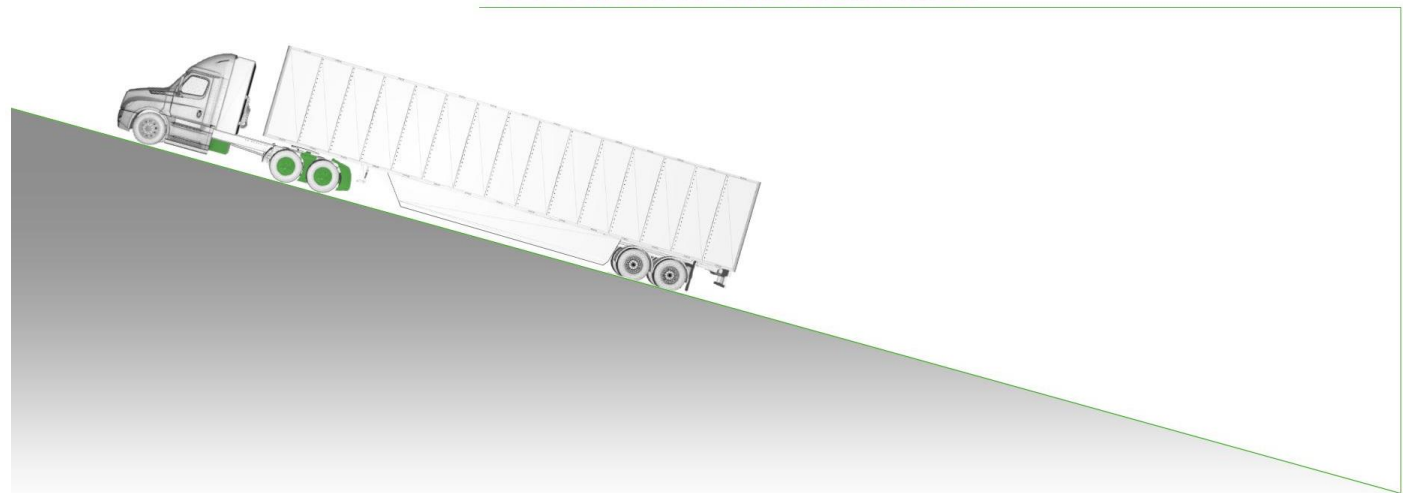
Brand and engine agnostic, the Hyliion CNG system can be installed on any Class 8 CNG vehicle from any manufacturer.

Volvo has developed a **Hyliion-ready chassis spec** to accommodate the Hyliion system.

STORE ENERGY GOING DOWN HILL



TO POWER UP THE NEXT HILL



Volvo New Truck Order



FLEET OVERVIEW:

Privately owned, premium grocery chain operating the the Northeastern United States. With an initiative to dramatically reduce their diesel fuel dependency.

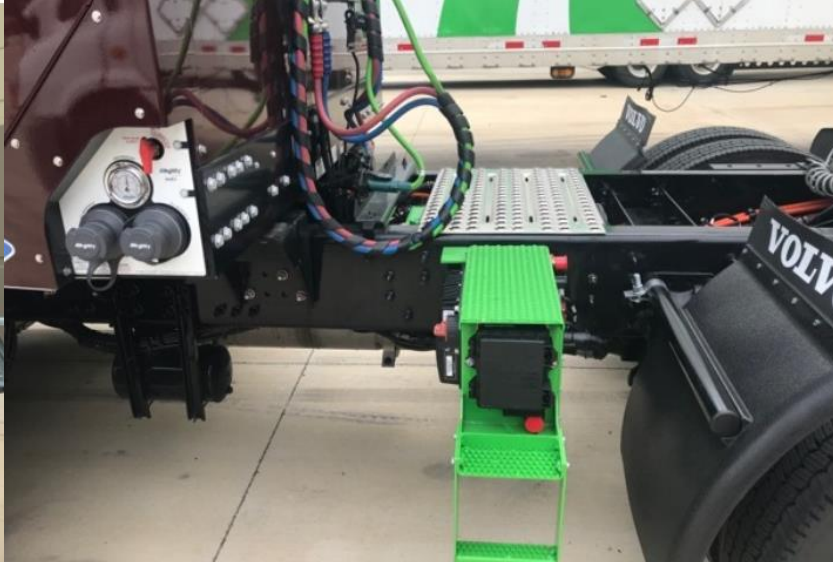
UNIQUE APPLICATION:

Typical delivery hauls tandem trailers traveling along I-90 in upstate New York. Standard spec CNG tractors have historically been limited to single trailer spec trucks.

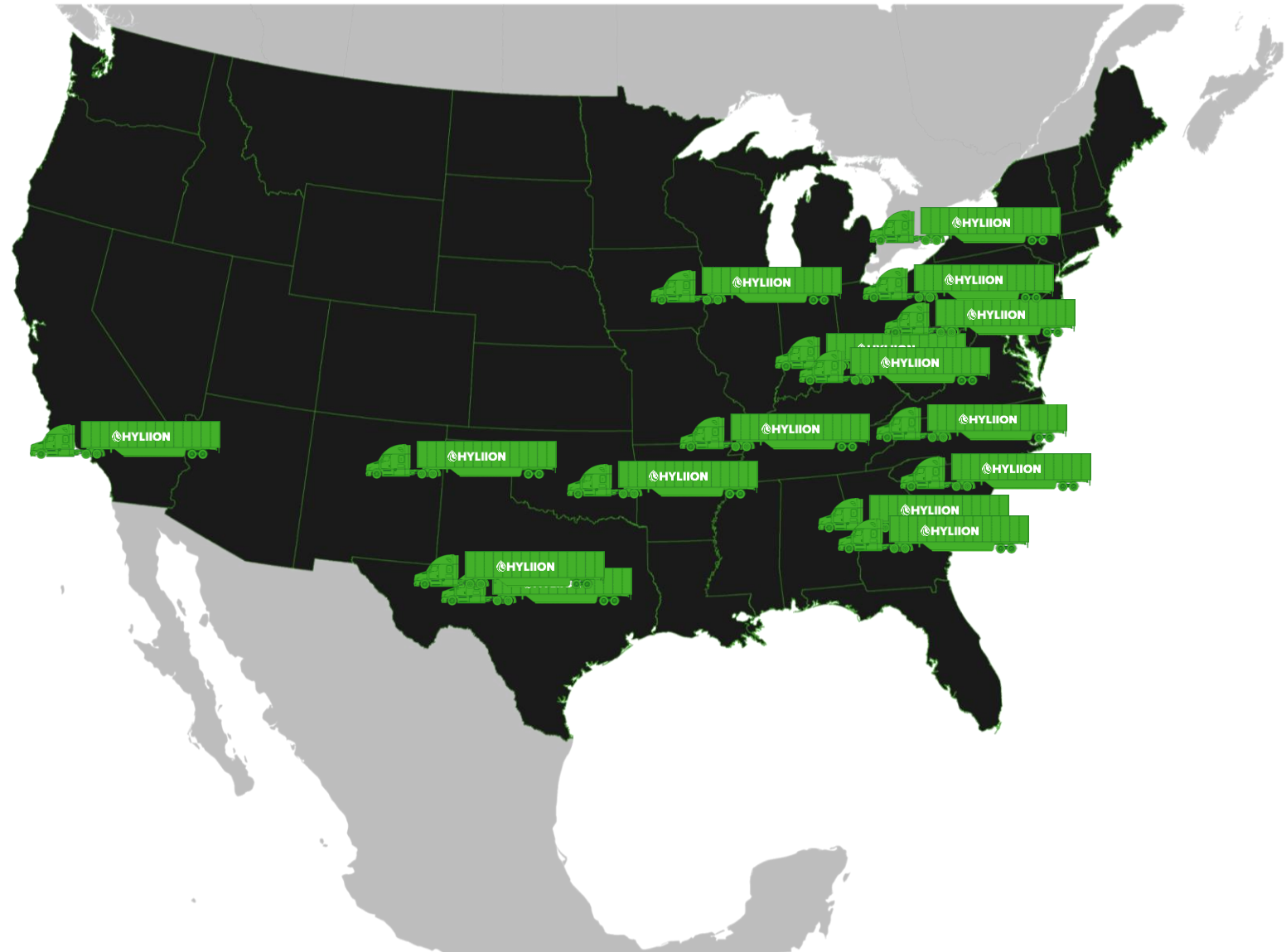
HYLIION VALUE:

The Hylion power assist algorithm allowed the customer to replace their tandem spec diesel tractors with CNG tractors, pulling tandem loads with CNG for the first time and cutting their fuel expense in half. Hylion worked collaboratively with Volvo for a Hylion chassis spec after this success.





Truck #	Location	6X4HE
70000	Smithfield, VA	👍
70001	Abilene, TX	👍
70002	Stafford, CT	👍
70003	New Boston, TX	👍
70004	Cedar Park, TX	👍
70005	Lingelstown, PA	👍
9001	Selma, NC	👍
9002	Selma, NC	👍
2936	Catoosa, OK	👍
55163	Kyle, TX	👍
668413	Seymour, TN	👍
C500	Rochester, NY	👍
2800	Rochester, NY	👍
101	Cedar Park, TX	👍
102	Cedar Park, TX	👍
103	Cedar Park, TX	👍
104	Penn Hills, PA	👍
105	Florence, TX	👍



HYPERTRUCK

ERX

 **HYLIION**



OEM COMPATIBLE



VOLVO
FREIGHTLINER®
Peterbilt
KENWORTH



LAUNCH PARTNER



Agility
A New Logistics Leader

Agility, a global logistics leader, has placed a binding pre-order for 1,000 trucks

335 Hypertruck ERX's eliminate 1 Million Metric Tons of CO2 Emissions



LOWEST TCO



CARBON NEGATIVE & ZERO EMISSIONS POTENTIAL



INCREASED PAYLOAD CAPACITY











DATA ANALYTICS & ADVANCED ALGORITHMS



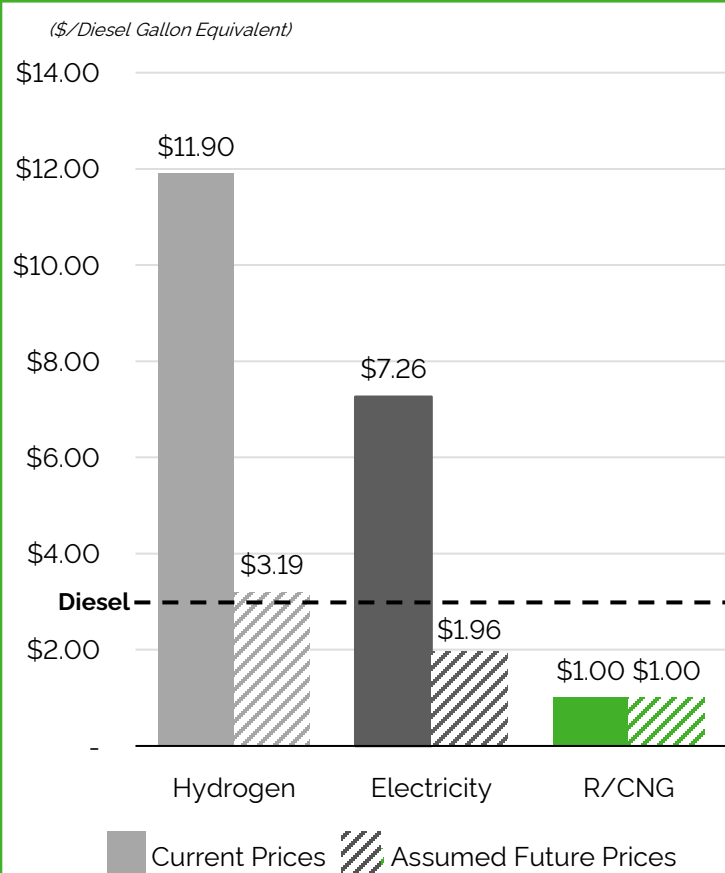
FUEL AGNOSTIC

HYLIION OFFERS THE LOWEST TOTAL COST OF OWNERSHIP

CLASS 8 SOLUTIONS

				
	DIESEL	FUEL-CELL ELECTRIC (FCEV)	BATTERY-ELECTRIC (BEV)	HYPERTRUCK ERX
				
AVAILABILITY	TODAY	2023+	2021+	2021
UPFRONT VEHICLE COST	\$132,600	\$235,000	\$200,000	\$220,000
5-YEAR TOTAL FUEL COST	\$283,393	\$300,000	\$84,000	\$81,191
5-YEAR TOTAL PAYLOAD REVENUE LOST/(GAINED)	N/A	\$37,500	\$100,000	(\$25,000)
5-YEAR TOTAL COST OF OWNERSHIP	\$415,993	\$572,500	\$384,000	\$276,191
SAVINGS VS. DIESEL	---	-38%	8%	34%

FUEL PRICES

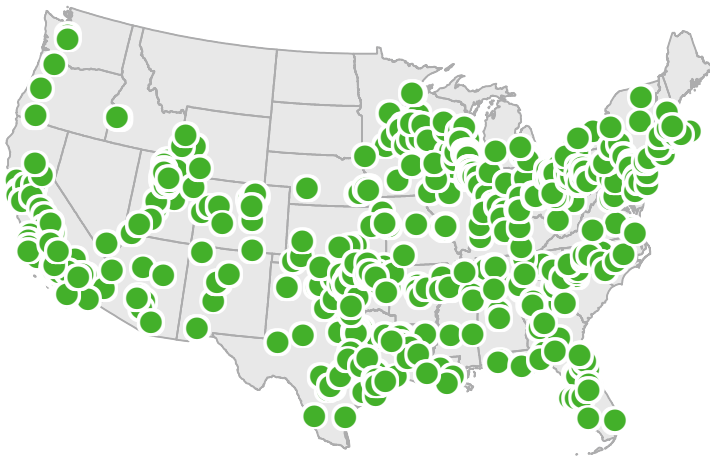


*Tesla & Nikola payback figures are based on assumed future prices.

EMISSION LEVELS OF FUEL SOURCES

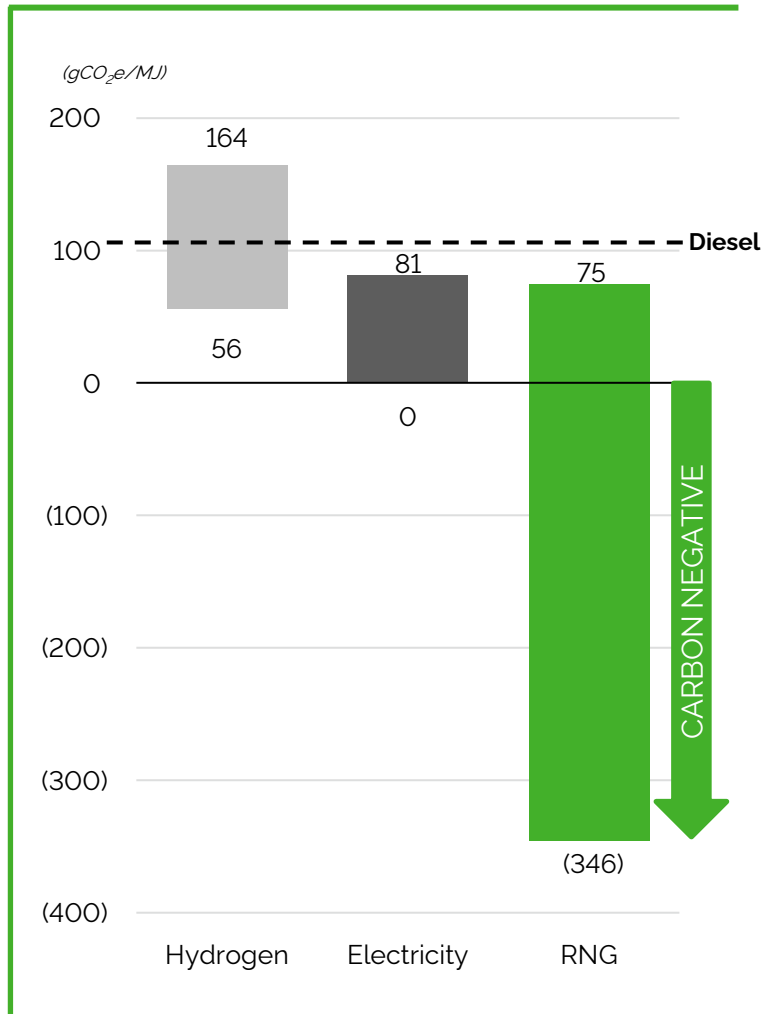
FUELING INFRASTRUCTURE

Existing Infrastructure <i>(# of Class 6-8 fast fueling stations in North America)</i>		
Hydrogen	Electricity	R/CNG
<10	<10	729



Estimated Total Cost to Establish 729 Stations <i>(Equivalent to current R/CNG Class 6-8 established stations)</i>	
Hydrogen	~\$12 Billion
Electricity	~\$7 Billion

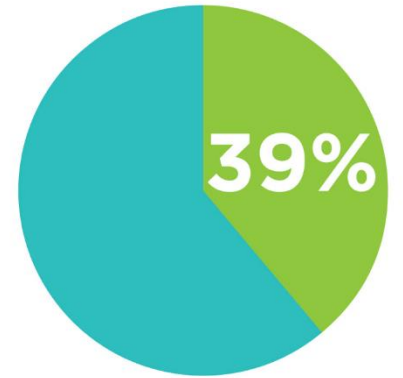
FUEL CARBON INTENSITY SCORES



RNG AVAILABILITY

2019 NGV Fuel Use

717 Million GGE Total
In 2019, **39%**, of all on-road fuel used in natural gas vehicles was RNG



- Conventional Natural Gas
440 Million GGE
- Renewable Natural Gas
277 Million GGE



PEPSICO

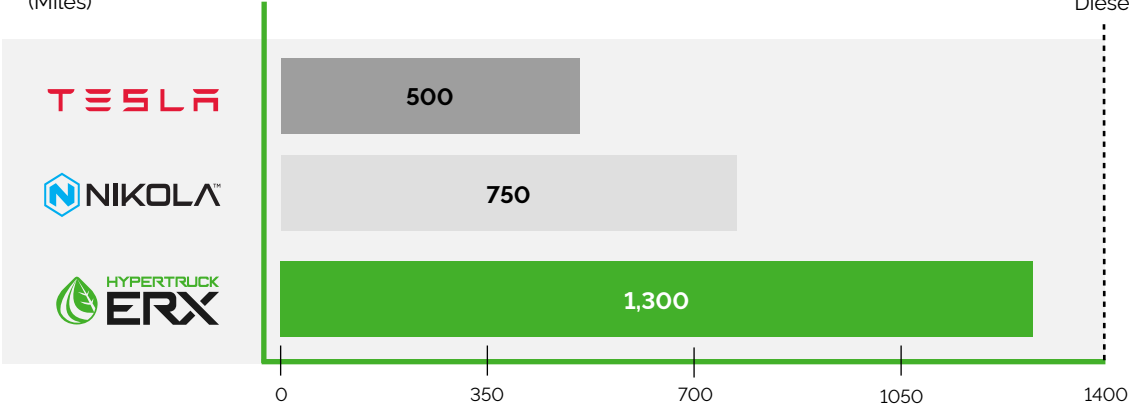


HYPERTRUCK PERFORMANCE

RANGE

(Miles)

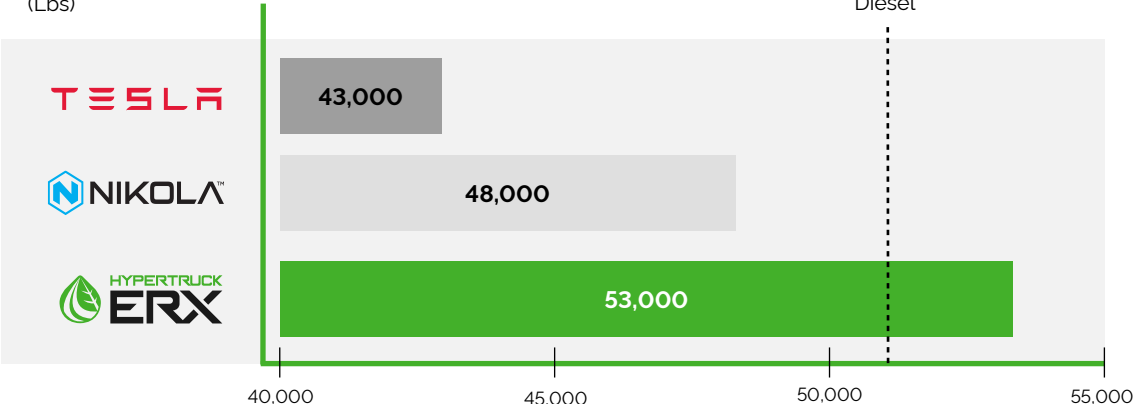
Diesel



PAYLOAD CAPACITY

(Lbs)

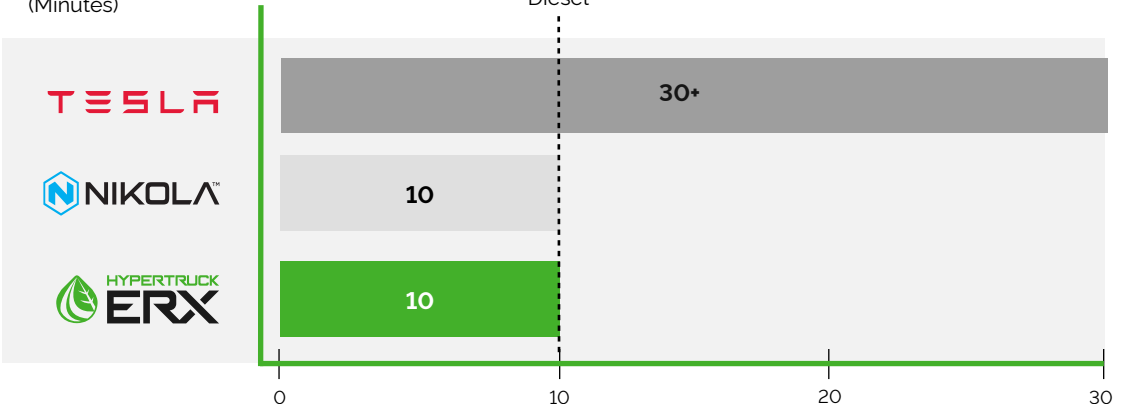
Diesel



REFUEL OR CHARGE TIME

(Minutes)

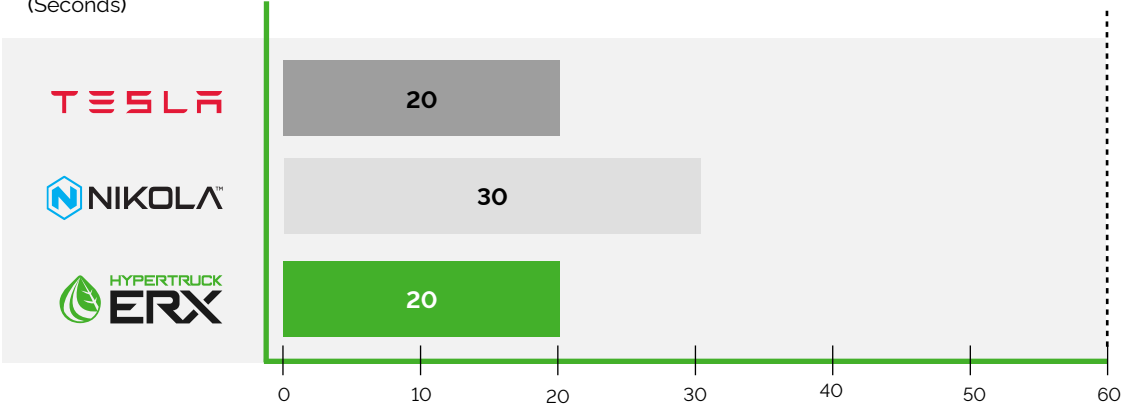
Diesel



PERFORMANCE 0-60 MPH LOADED

(Seconds)

Diesel



60 kWh or More Battery Power Available



Provides Power for External Systems



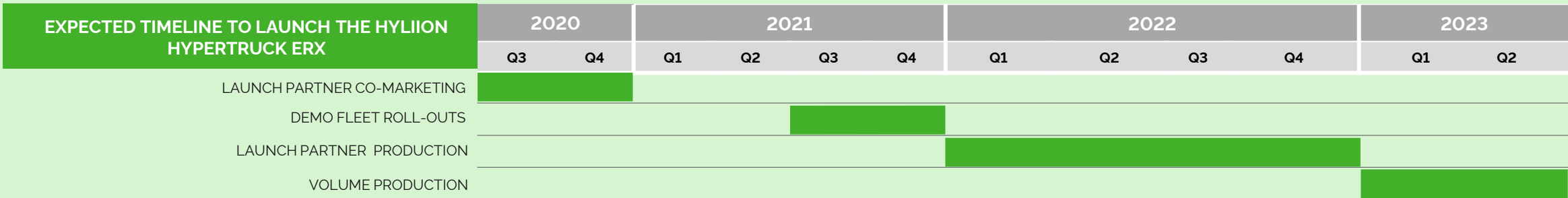
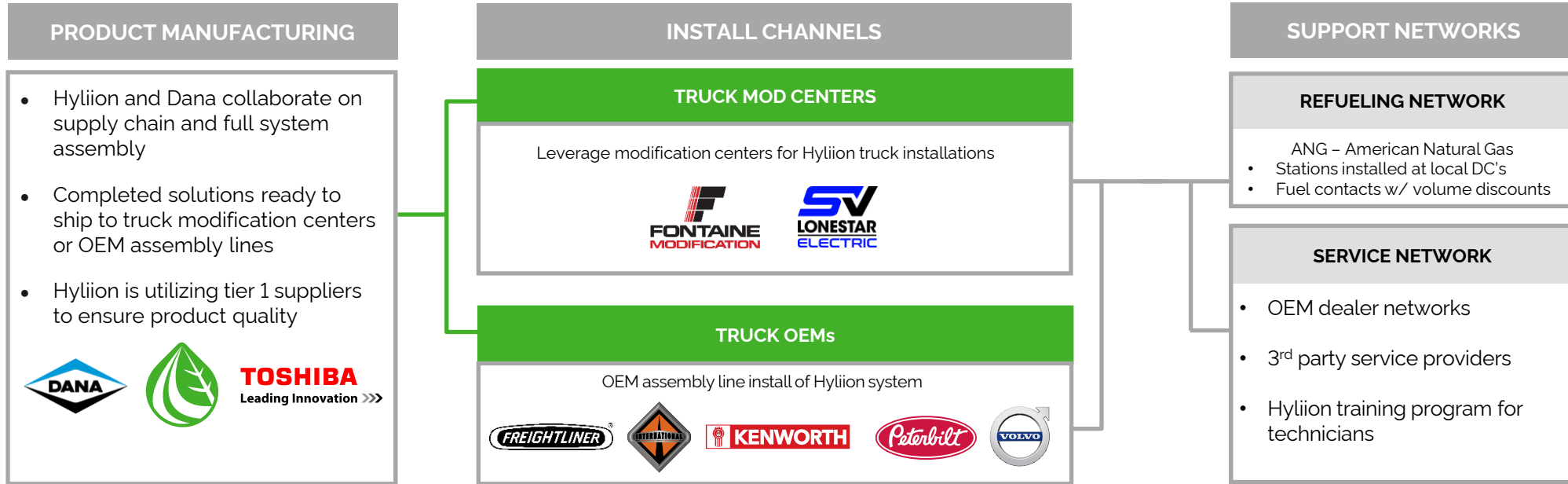
Eliminates need for traditional APU



25 miles or more of EV range in zero emission zones



PATH TO MARKET







THANK
YOU

