



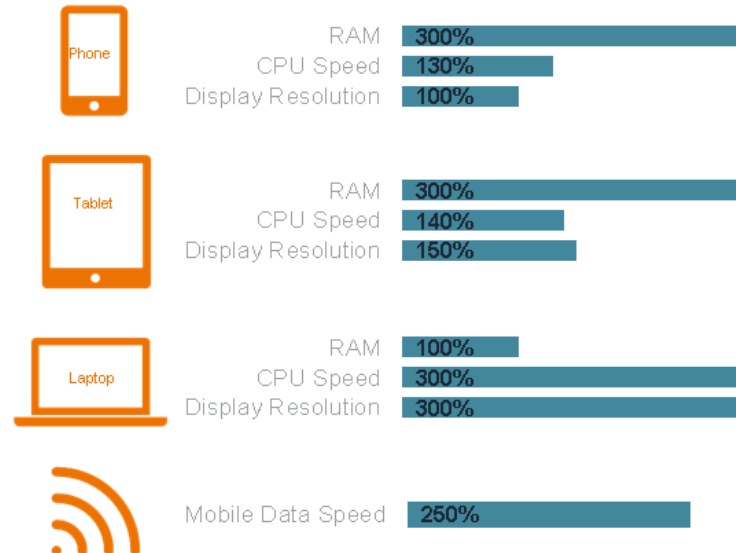
72H

**SMART MOBILITY AND NEW
TRANSPORT SERVICES**

EVOLUTION IN MOBILITY



But In 3 years,
Look how things change in the CE world...



As a result of this dynamic, **85%** of consumers would be willing to pay an additional **\$150** just to have the **option to upgrade** their vehicle electronics

DIGITALIZATION in Mobility

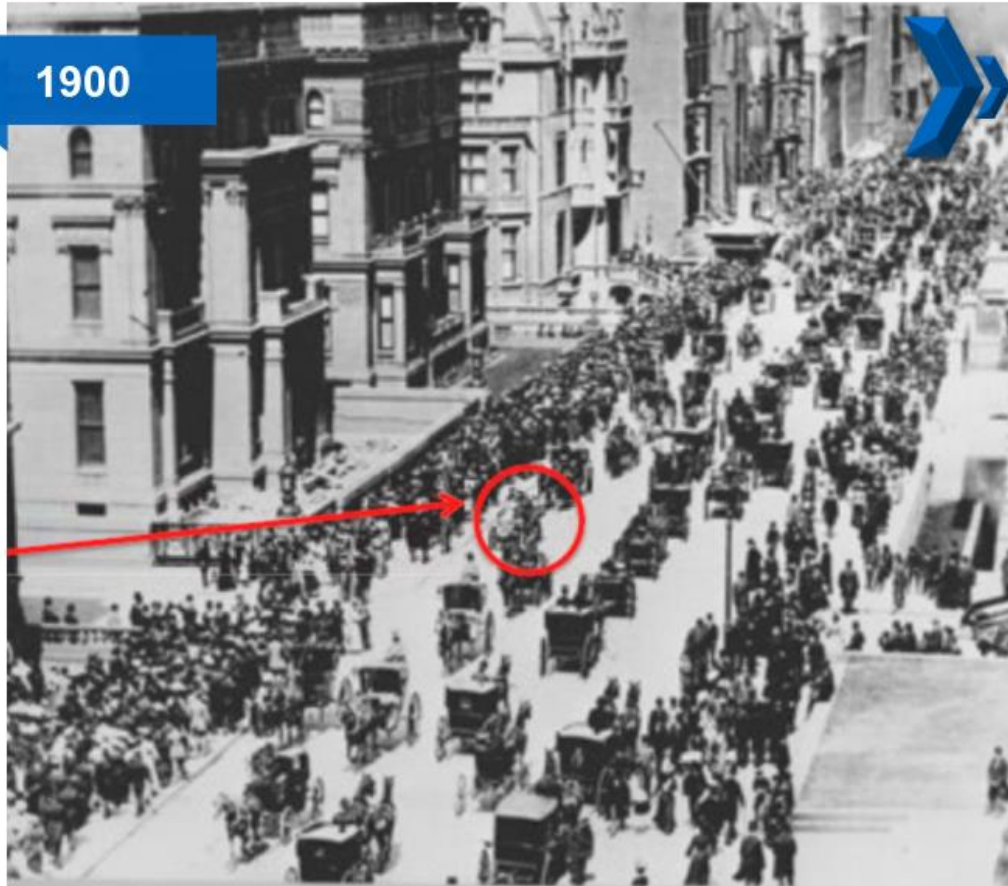


EVOLUTION
EVOLUTION

TECHNOLOGICAL PARADIGMA

5th Avenue, NYC

1900



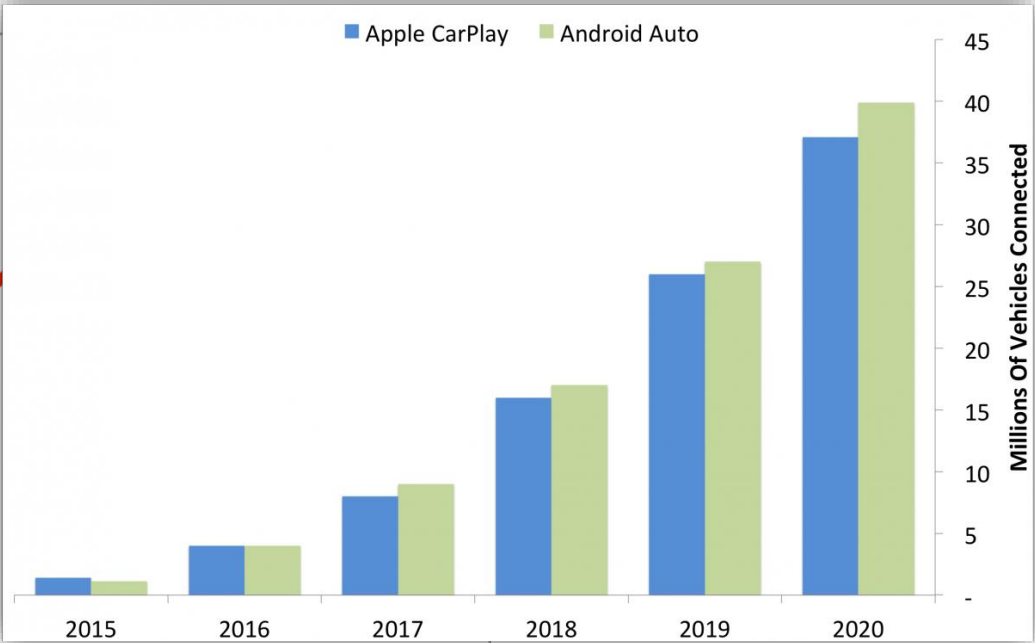
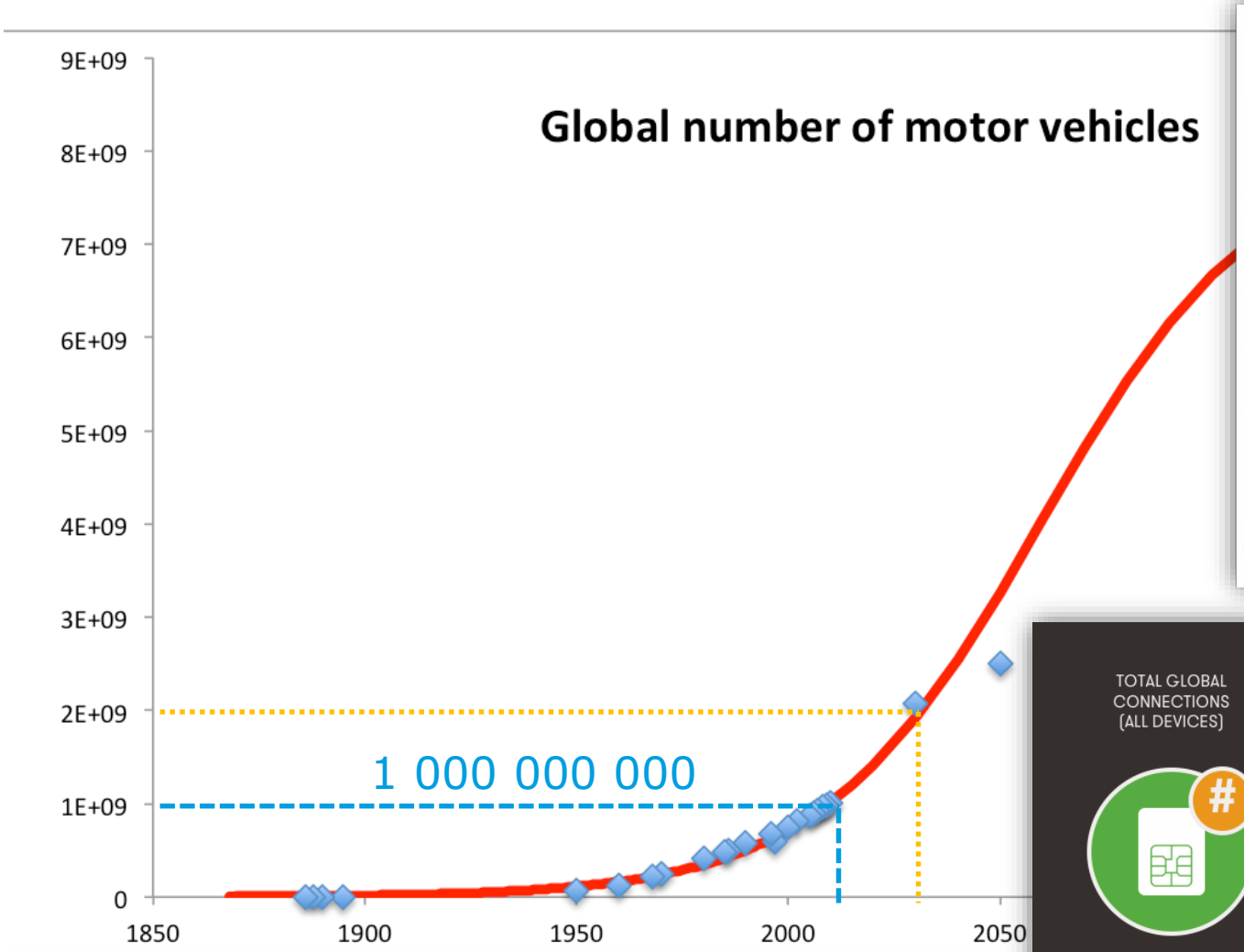
Lots of horses, one lonely car

1913



No horses

RISE OF THE CARS



RAMBOLL

TOTAL GLOBAL CONNECTIONS (ALL DEVICES)	CONNECTIONS ORIGINATING FROM SMARTPHONE DEVICES	SMARTPHONE CONNECTIONS AS A PERCENTAGE OF TOTAL CONNECTIONS	CONNECTIONS ORIGINATING FROM FEATURE-PHONE DEVICES	FEATURE-PHONE CONNECTIONS AS A PERCENTAGE OF TOTAL CONNECTIONS
#	#	#	#	#
7.3B	3.4B	46%	3.7B	51%

we are social

INCREASING OR DECREASING TRAFFIC JAMS



self-driven private vehicle



self-driven shared vehicle

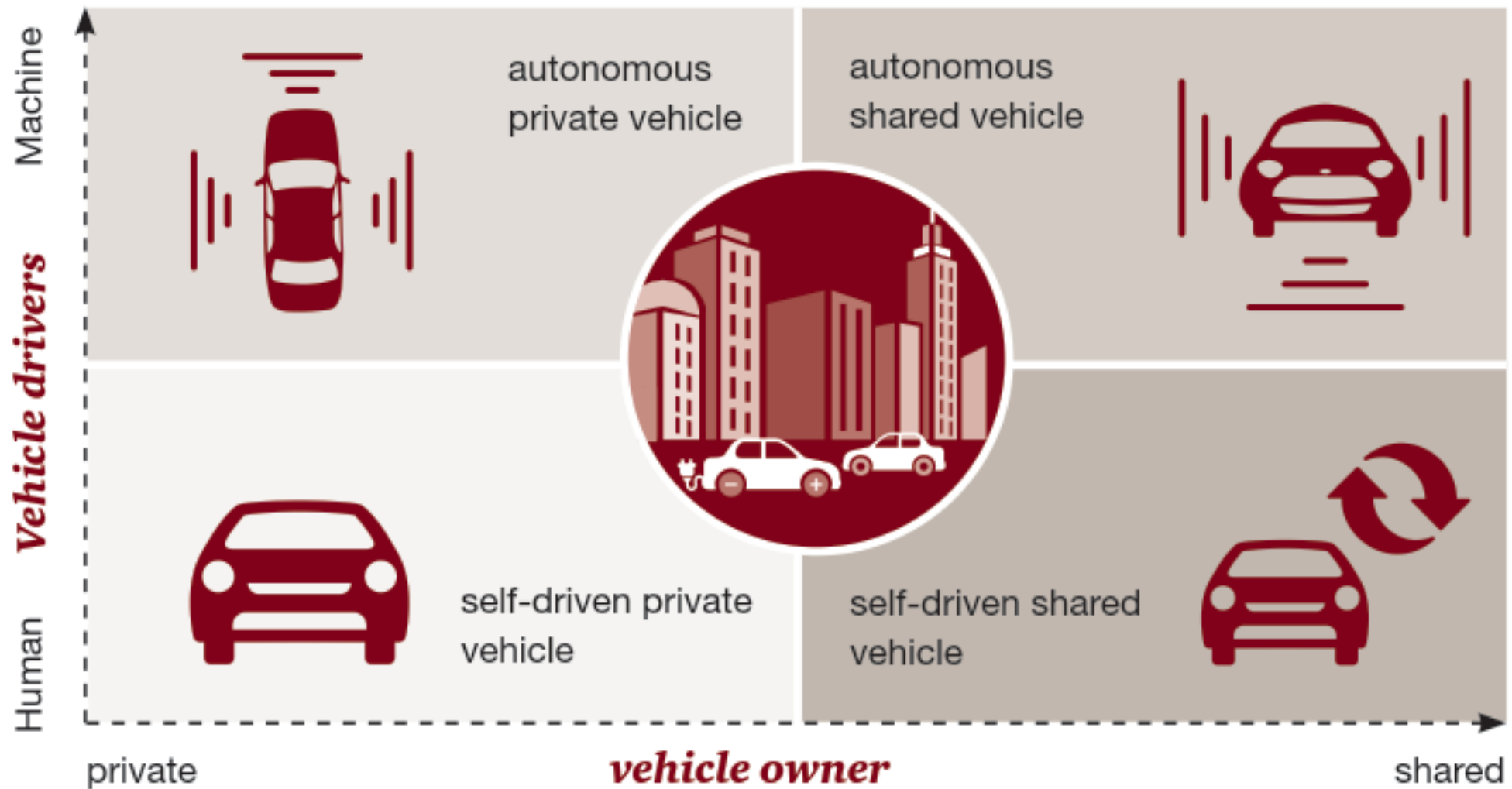


autonomous private vehicles



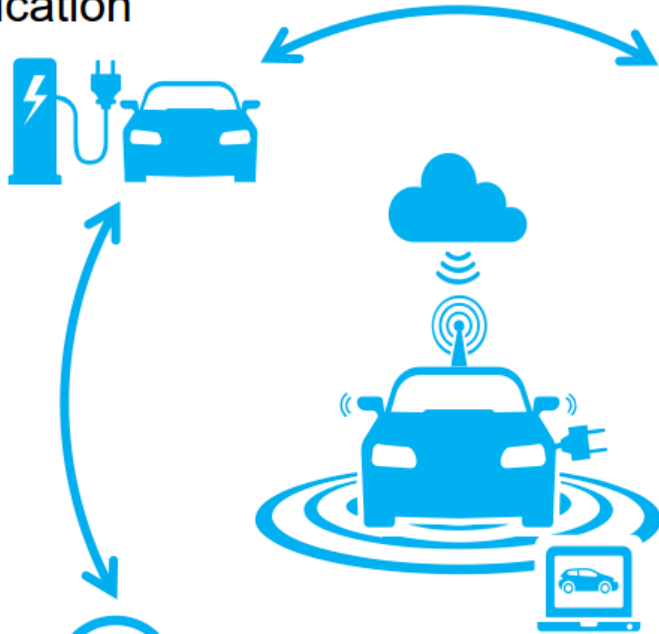
autonomous shared vehicles

COMMON UNDERSTANDING OF FUTURE MOBILITY

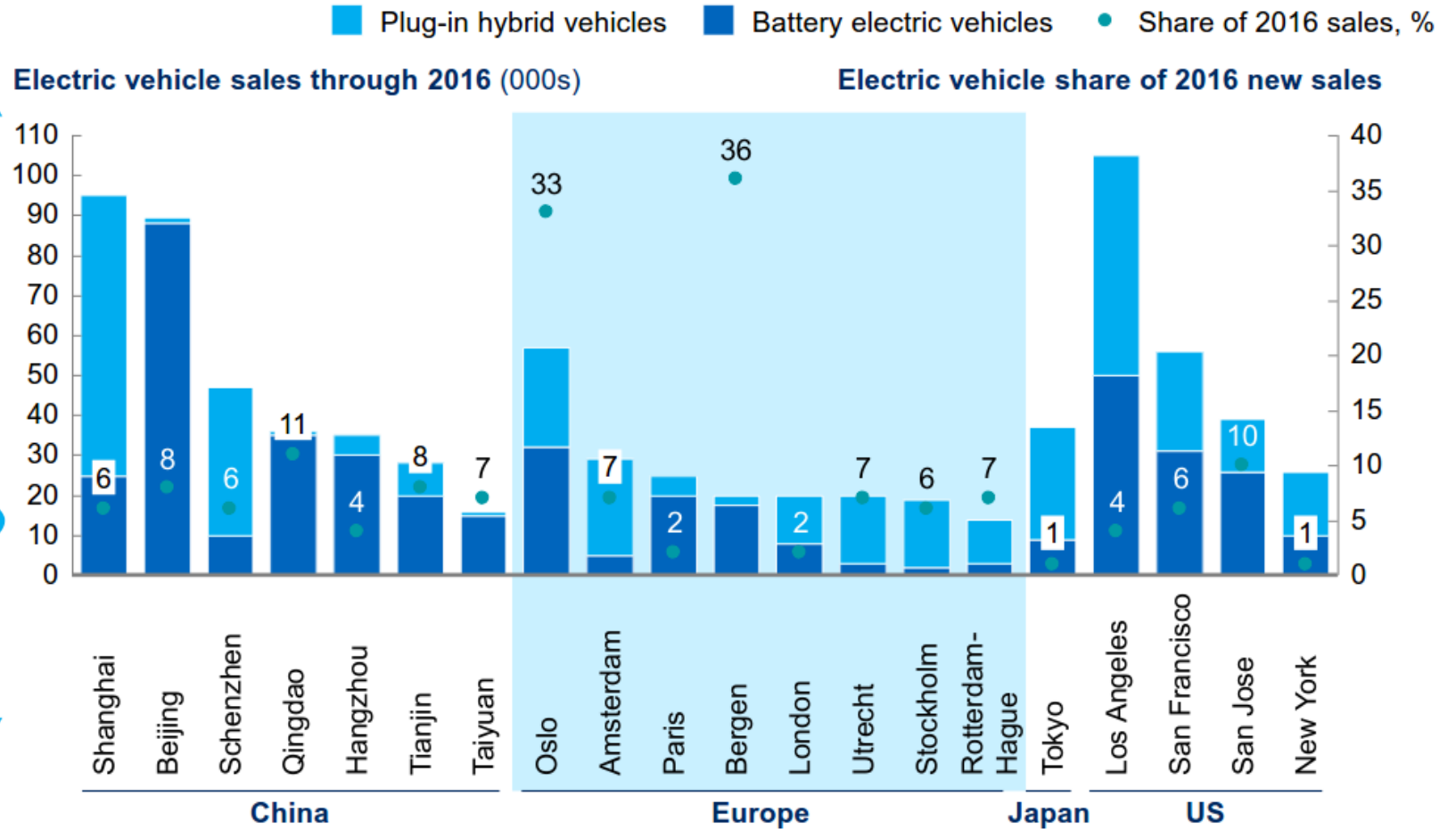


SUSTAINABLE (ACCEPTANCE) OF CARS

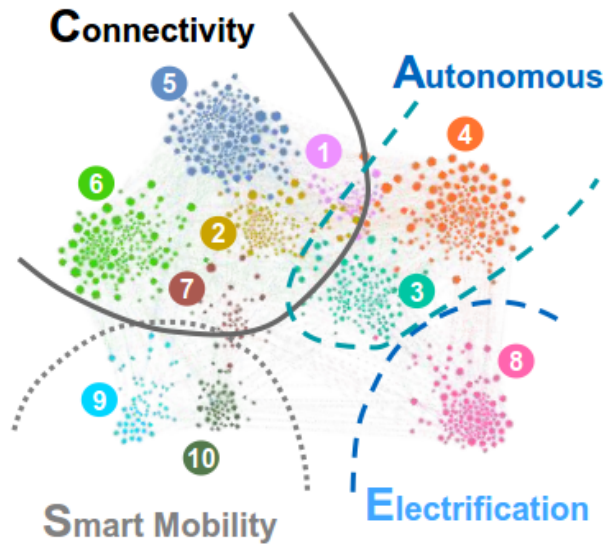
Electrification



Autonomous driving

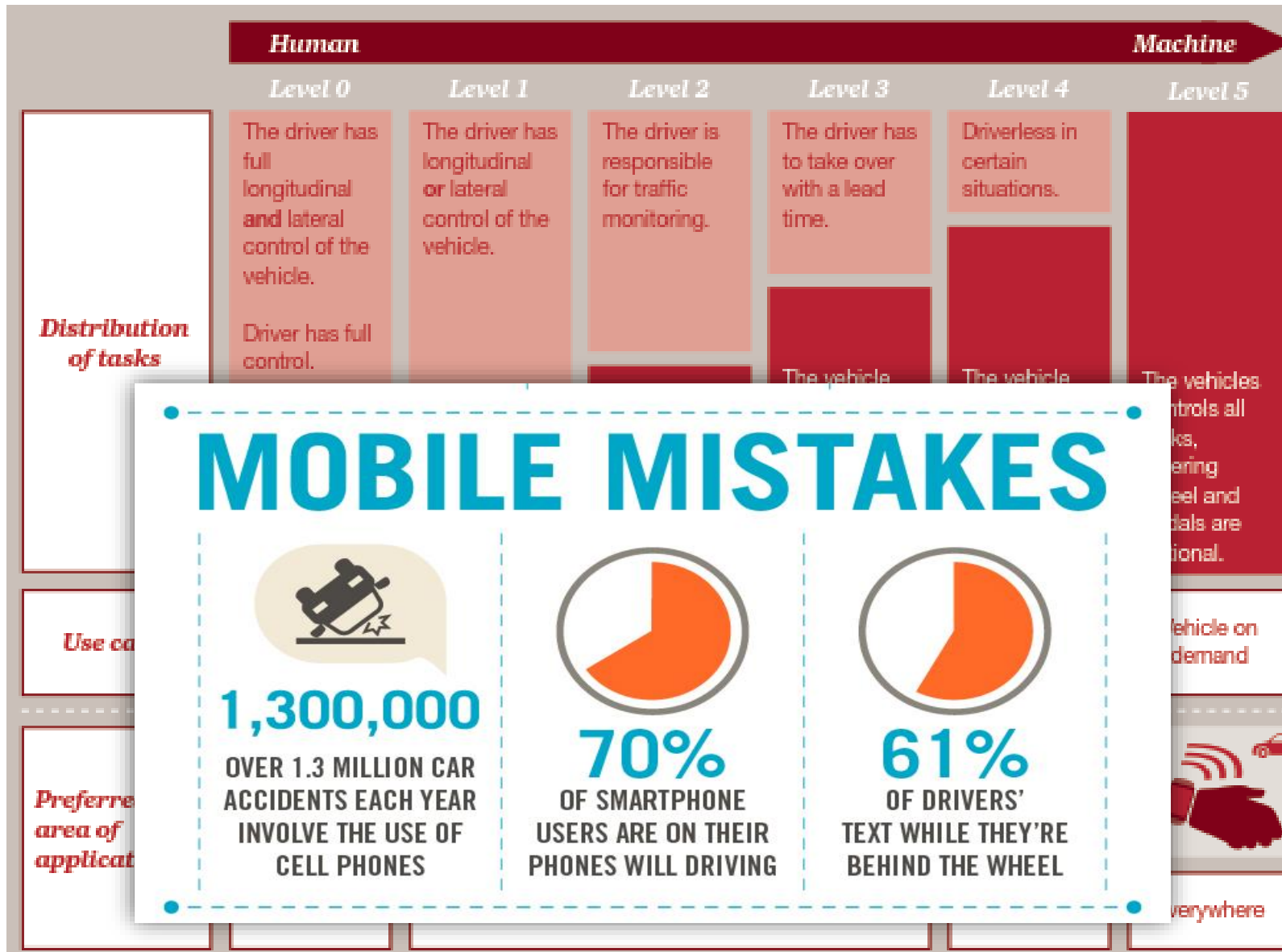


CHANGE IN TECHNOLOGY INVESTEMENTS 2010 → 2017

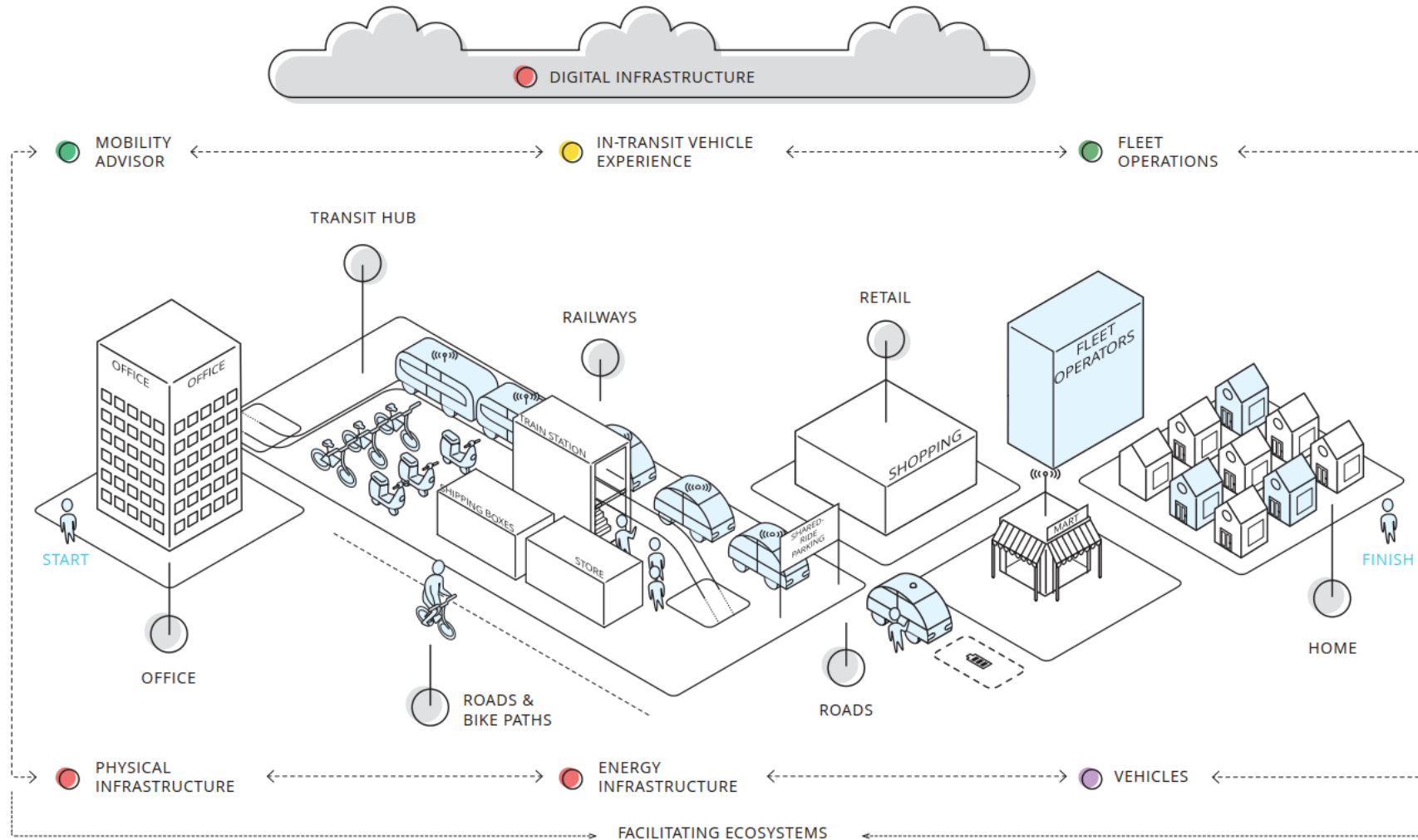


1	Gesture/voice recognition	0.6	0.1	0.1
2	User interface technologies	15.4	0.6	3.5
3	Autonomous solutions	24.1	0.1	6.4
4	Sensors/semi-conductors	12.9	1.8	1.5
5	Backend and cyber security	8.7	0.4	0.9
6	Telematics	3.3	0.4	0.4
7	Parking and mobility optimization	0.4	0.0	0.1
8	Electrification/energy storage	8.2	0.4	1.7
9	Vehicle leasing and fleet management	0.8	0.0	0.2
10	Sharing solutions	36.5	0.3	9.6
Total		42.5	68.5	110.9+
			4.3	25.3

CONTINUING WITH EVOLUTION OF MOBILITY

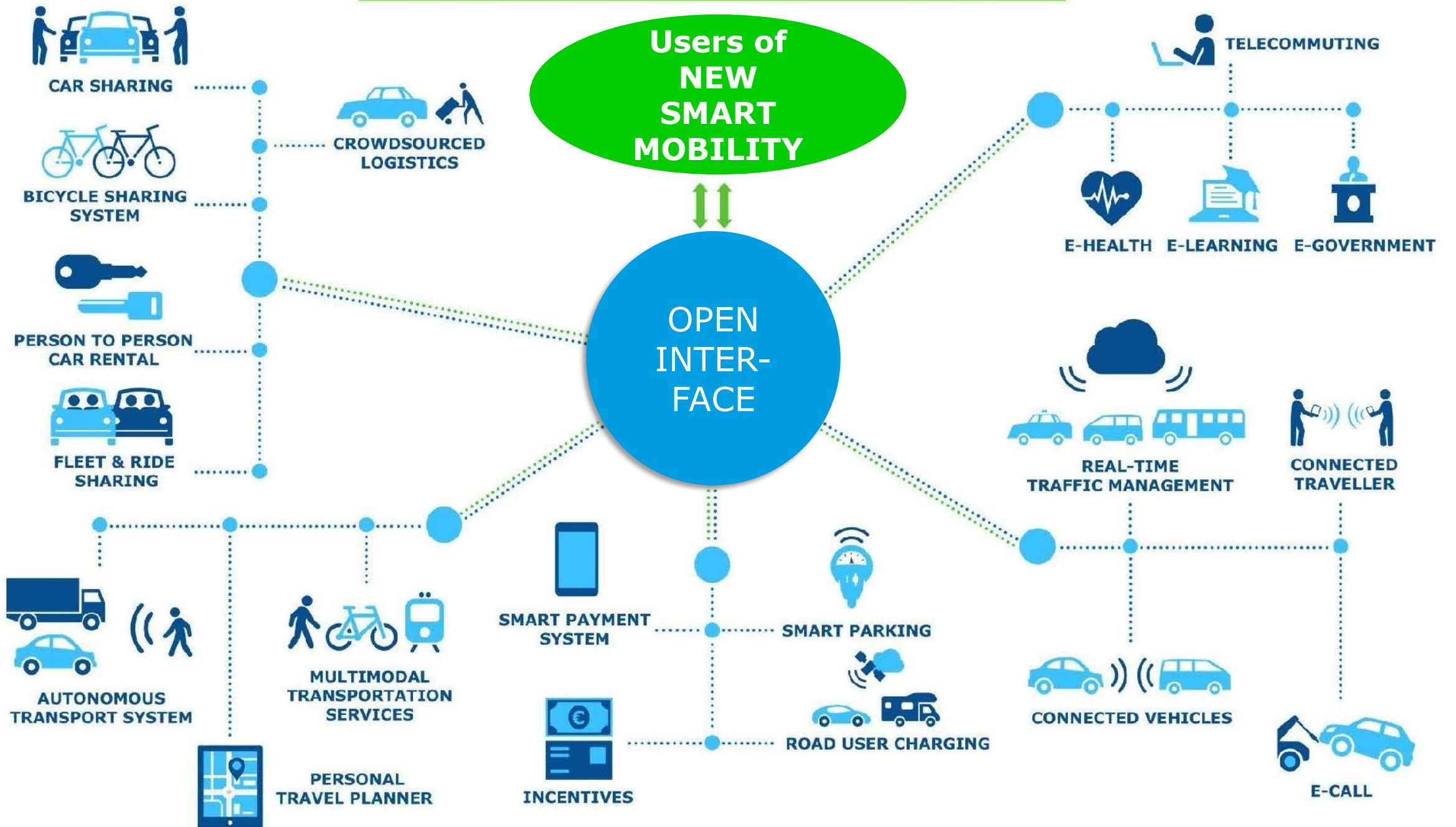


COMPLEX SMART MOBILITY ECOSYSTEM

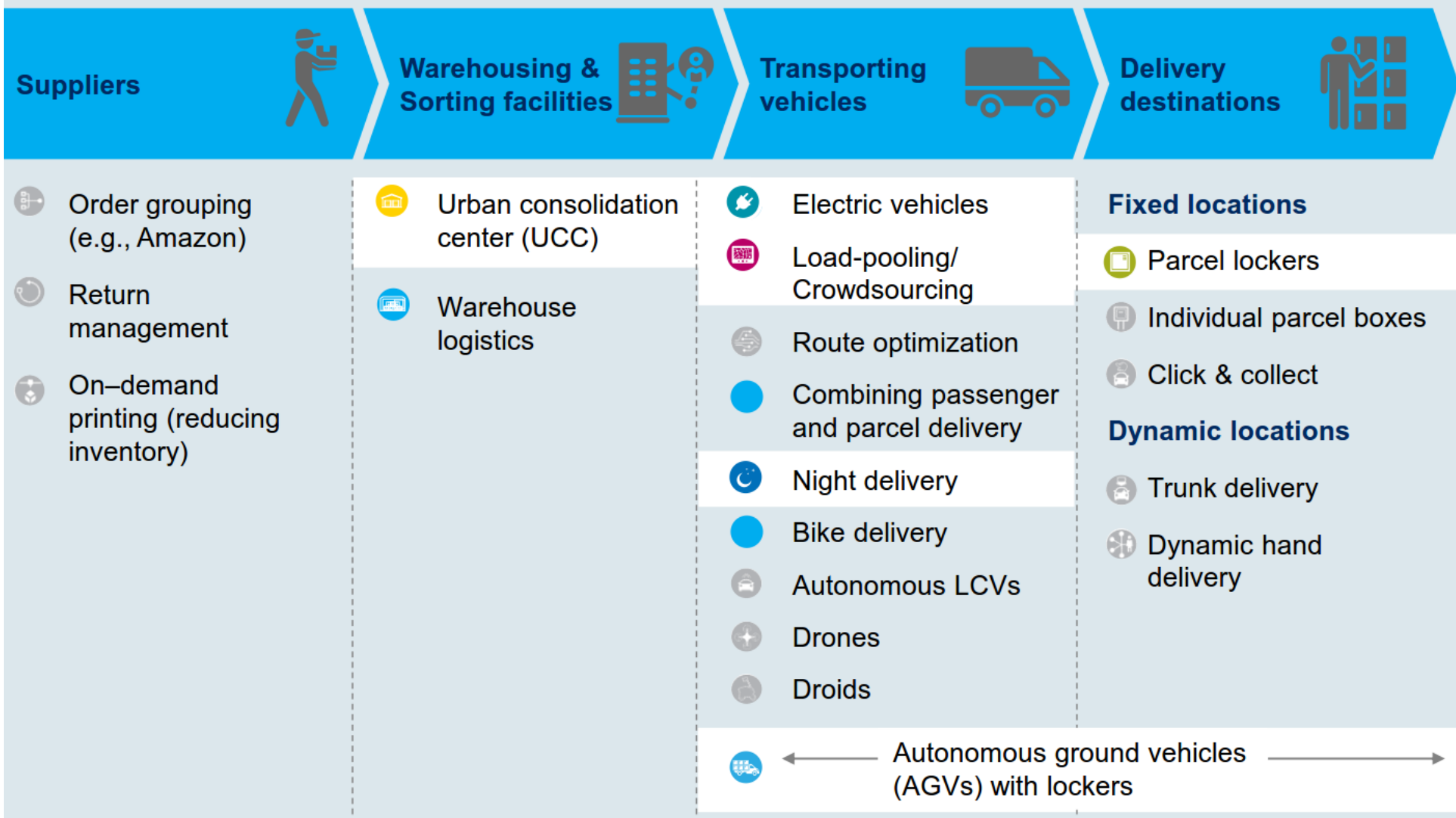


Users of NEW SMART MOBILITY

OPEN INTER-FACE



LAST-MILE BECOMES MORE AND MORE IMPORTANT





SEASIDE SUSHI



Verkehr: Derzeit HOCH - Tendenz weiter steigend Mautgebühr: 98,- €

Nächste Ausfahrt zu Parkhaus und TuBUS in 120 m

**Thank you !
Any questions?**