

F R O S T & S U L L I V A N

INTELLIGENT MOBILITY

Digital Transformation of the Automotive Industry

Future of Connected and Autonomous Vehicles & New Business Models

Presentation by:

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Top 8 Trends Transforming The Autonomous & Connected Landscape

Connected & Autonomous Services to Generate \$84Bn worth of revenue to OEMs by 2025

OWNERSHIP/ USERSHIP STRUCTURE



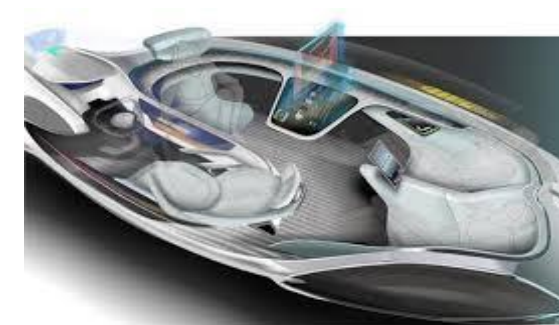
FUNCTIONS & SERVICES ON DEMAND



DATA USE CASES & MONETIZATION (DIRECT & INDIRECT)



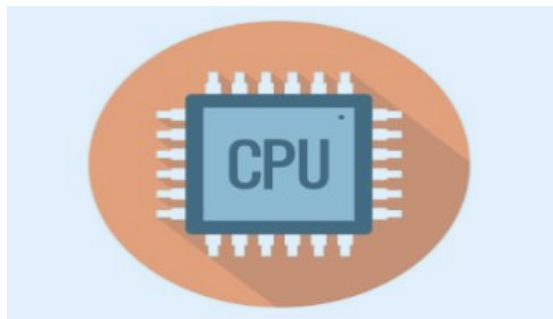
HANDS OFF HMI & PERSONALIZATION



NEXT GEN VISION TECHNOLOGIES



CENTRALISED AD ECUS



DEEP LEARNING

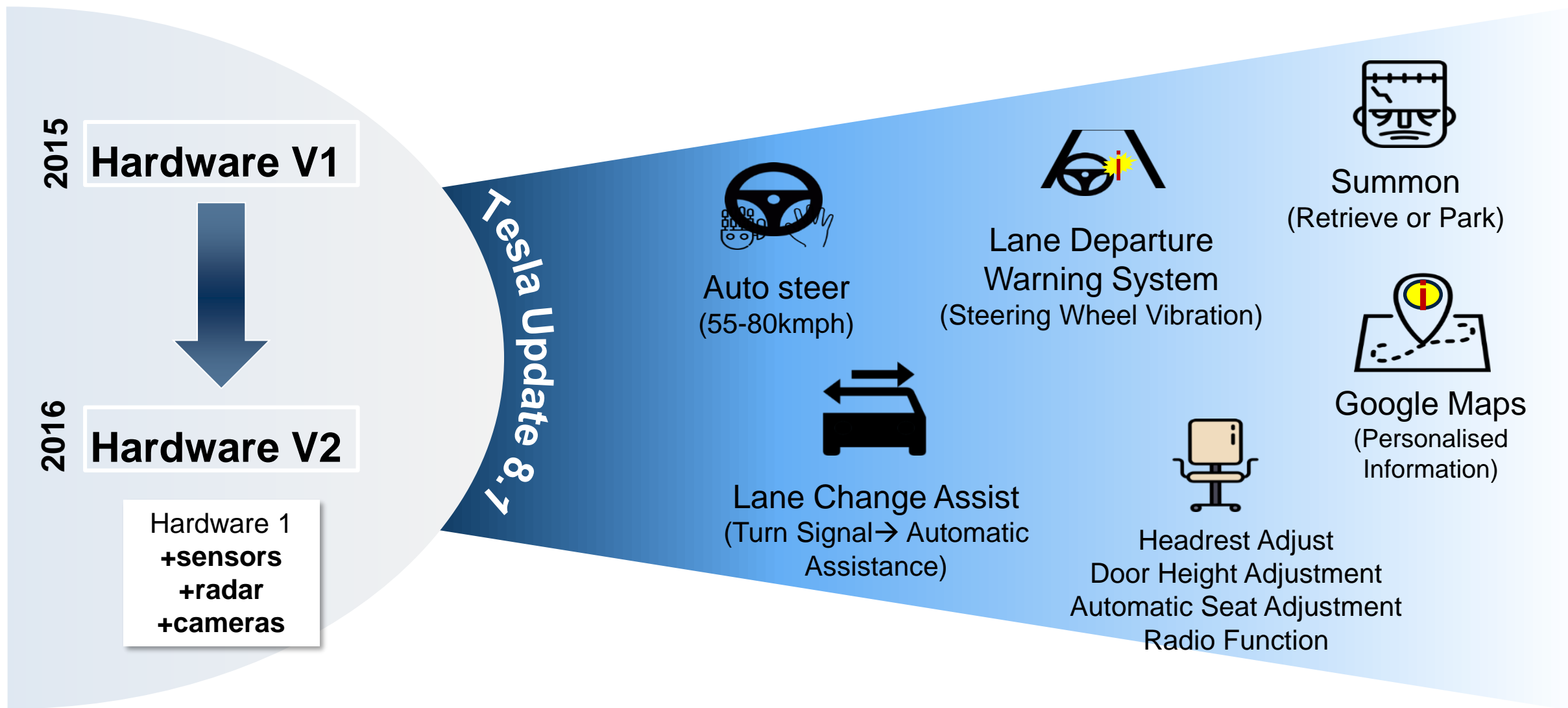


AUTOMATED ROBO TAXIS



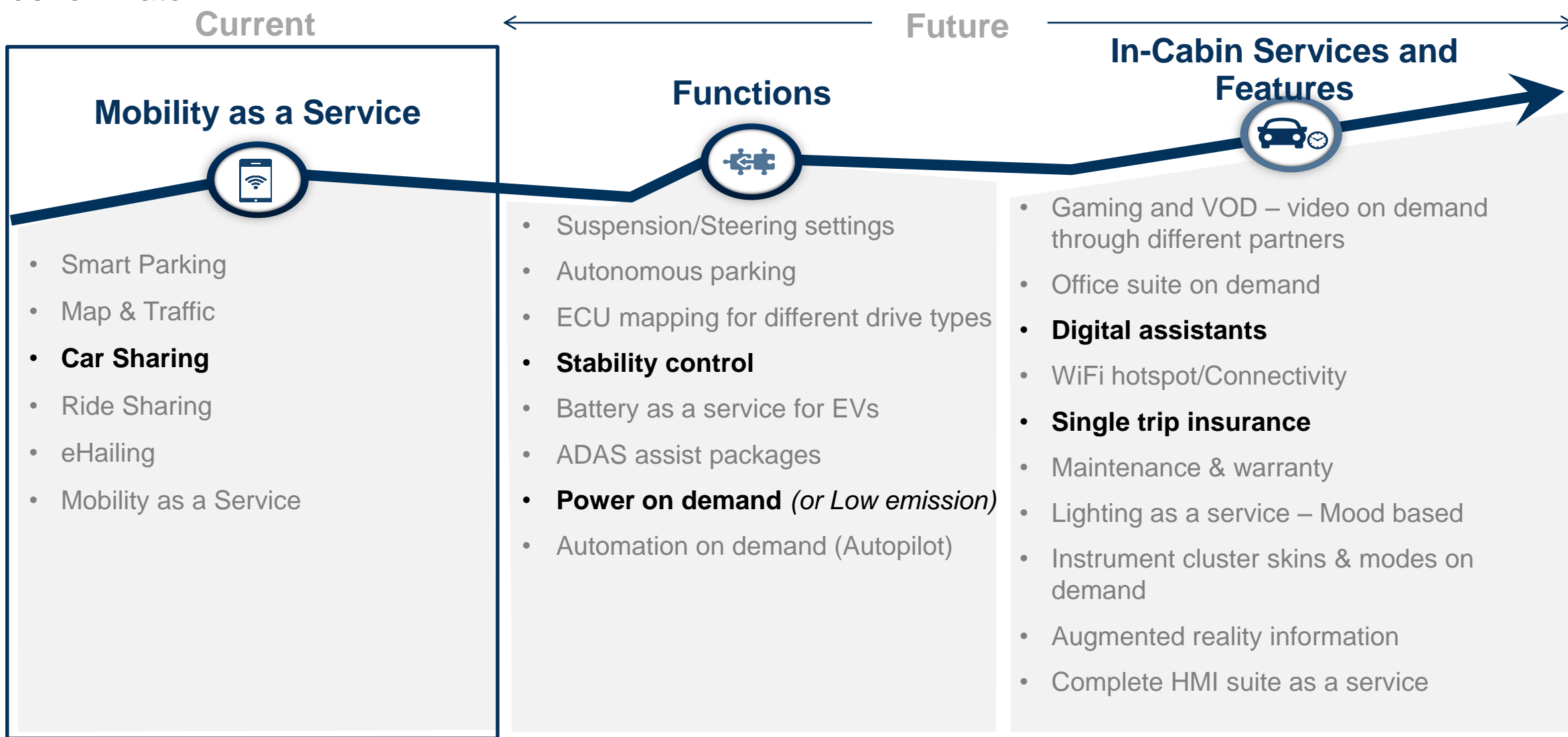
Vehicle Hardware Paving Way For Data & Service Centric Business Models

Tesla's to appify all services → One time hardware sale and OTA based service deliveries with FoD as USP



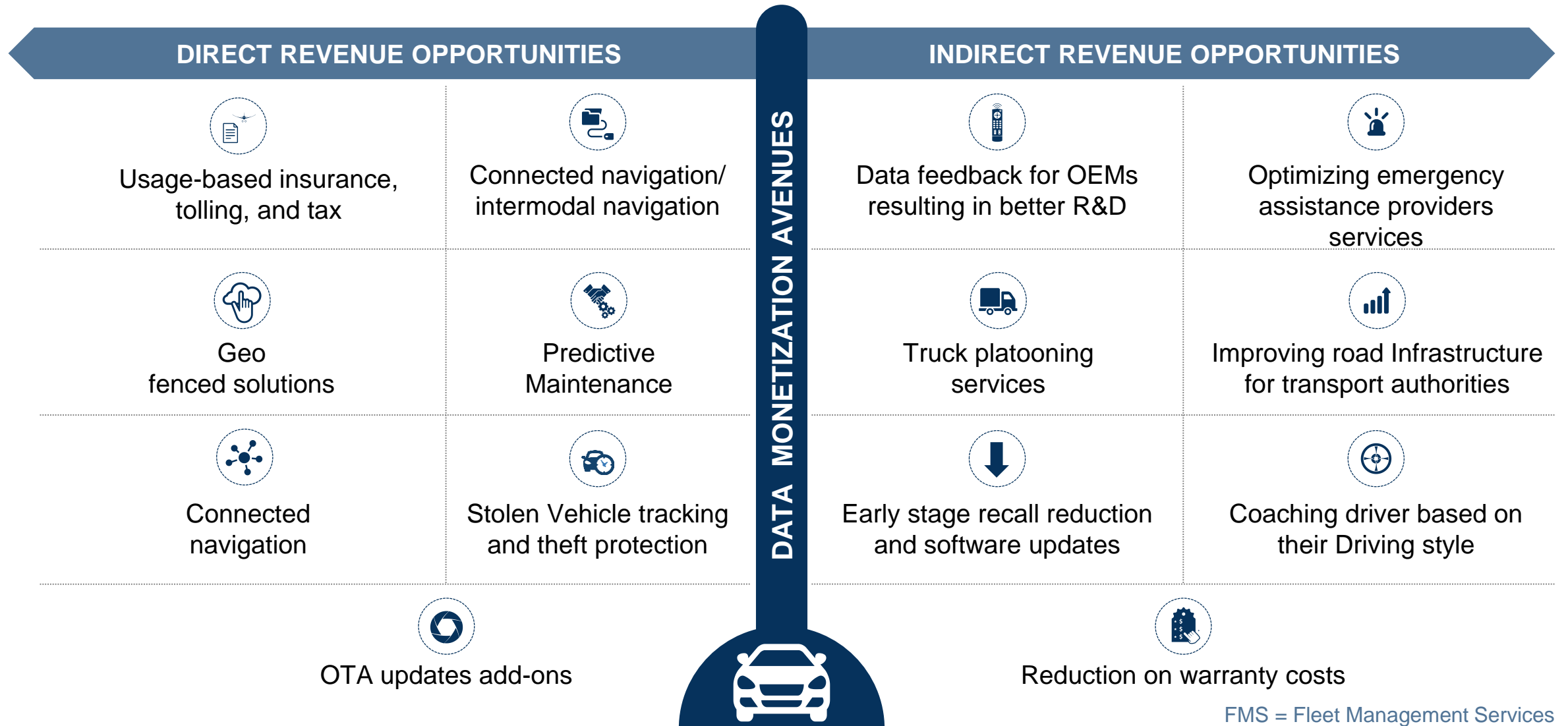
On Demand Features & Services To Drive Connectivity Business Models

Value creation model to focus more on the downstream product lifecycle for which connectivity is the common denominator.



Data Monetization Potential In Connected & Autonomous Mobility

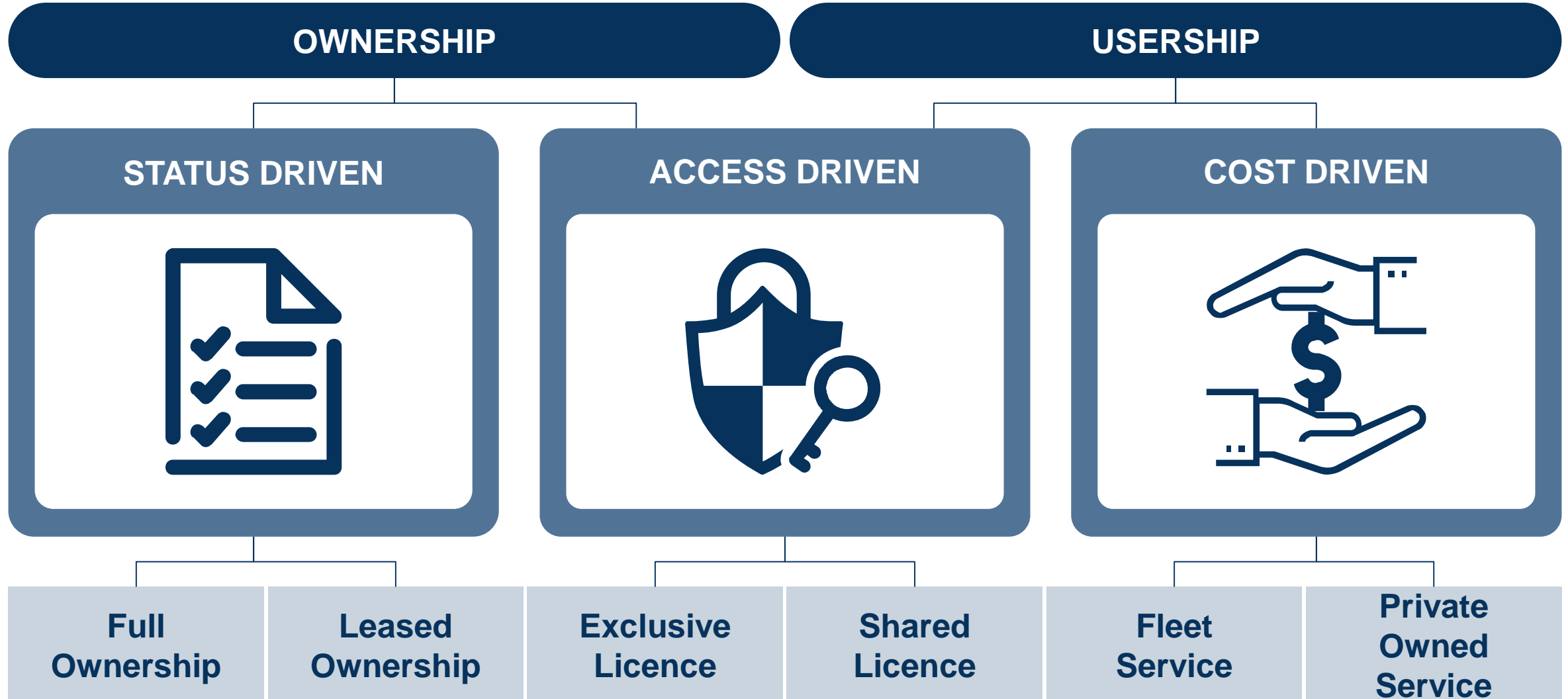
Multiple players across the ecosystem are developing the HW/SW to capture data and turn it into business.



FMS = Fleet Management Services

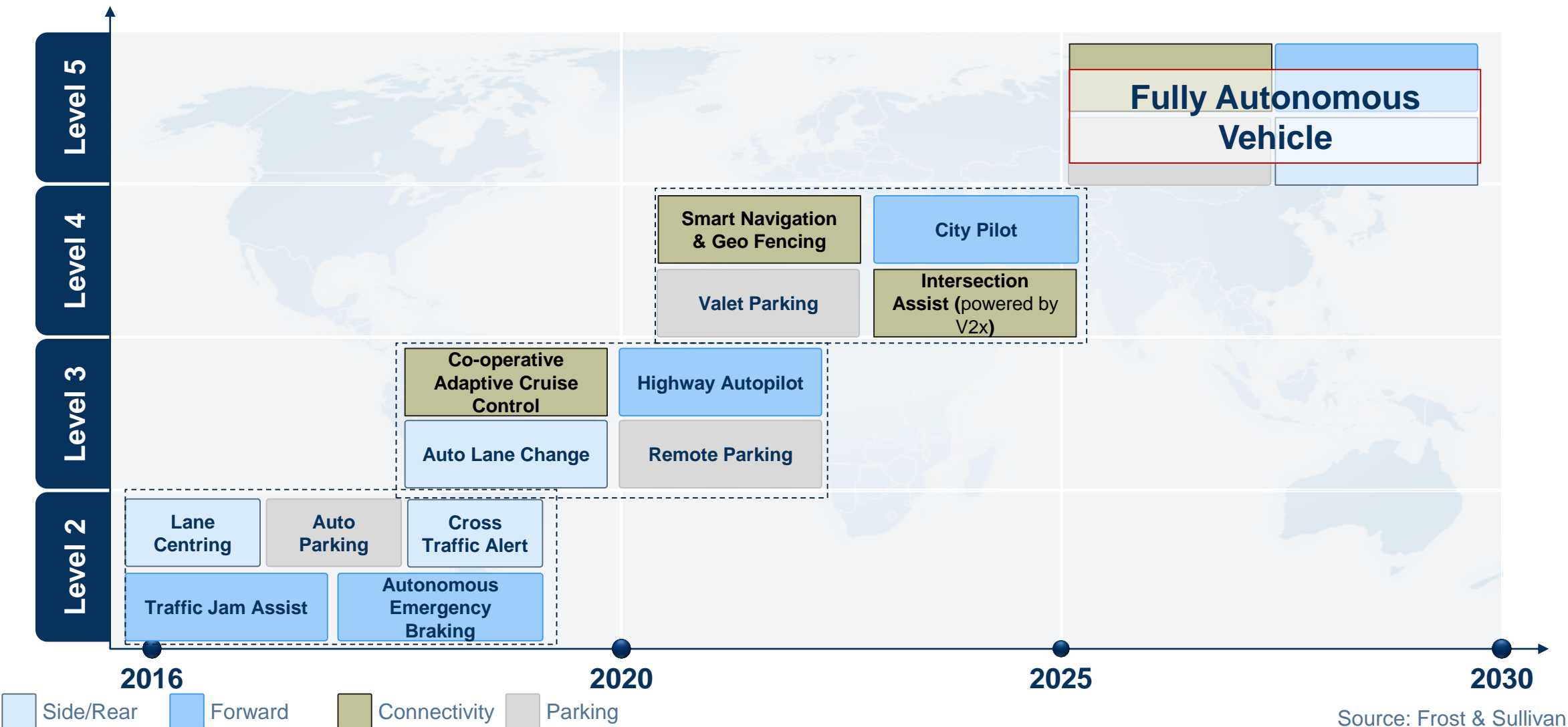
Future Ownership & Usership Structures In An Autonomous Eco System

Users to access multiple structures based on their day to day needs and travel scenarios



Feature Adoption For Each Level Of Autonomous Driving

At least 4 OEMs to skip level 3 Autonomous Driving & Full Level 5 capability not to be available before 2025



Source: Frost & Sullivan

Start Ups Are Disrupting The Current Autonomous Driving Eco System

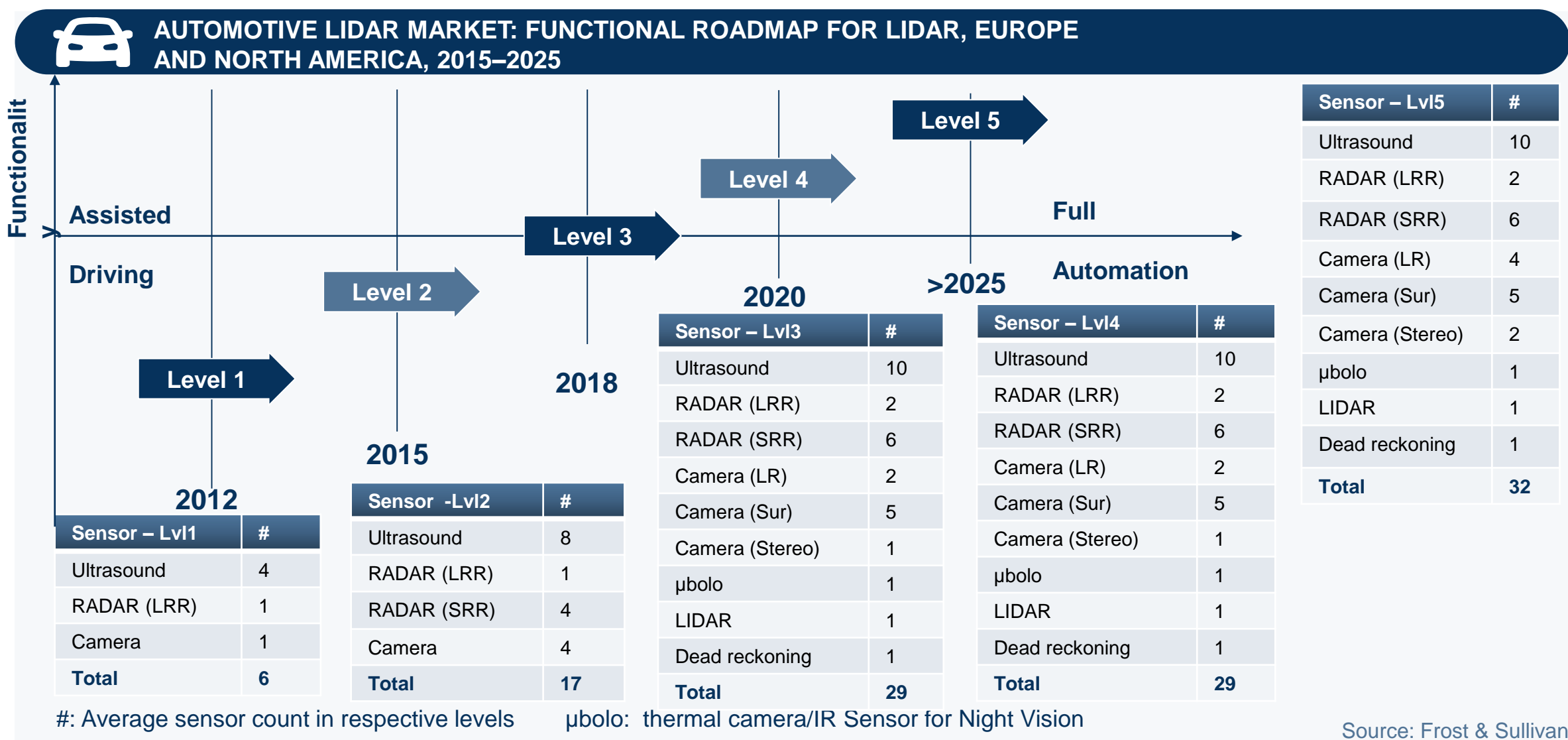
Over 300 start ups disrupting the autonomous & connected driving value chain



Source: requestsforstartups.com; Frost & Sullivan

Highly Autonomous Cars To Have Up to 6 RADARs and 9 Camera Modules

The cost & image quality of solid state LiDARs to be instrumental in deciding the success of the technology.



Autonomous Driving To Transform Design Styles Of Future Vehicles

Distinct styling, materials and features will dominate design and development of autonomous vehicles.

E Mirrors



Swivelling Seats



Flexible Active Aero



Head Lights



Steering Columns



Split Tyres



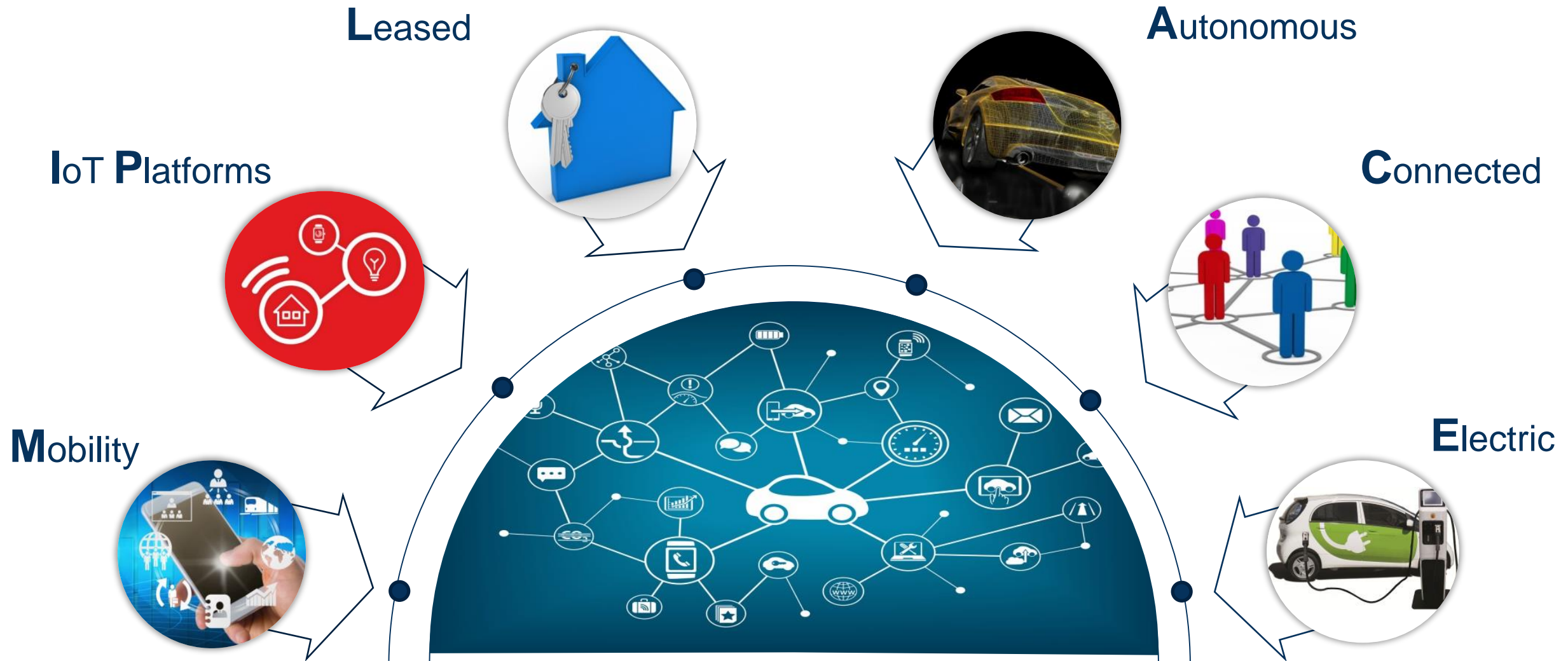
Interior Lighting



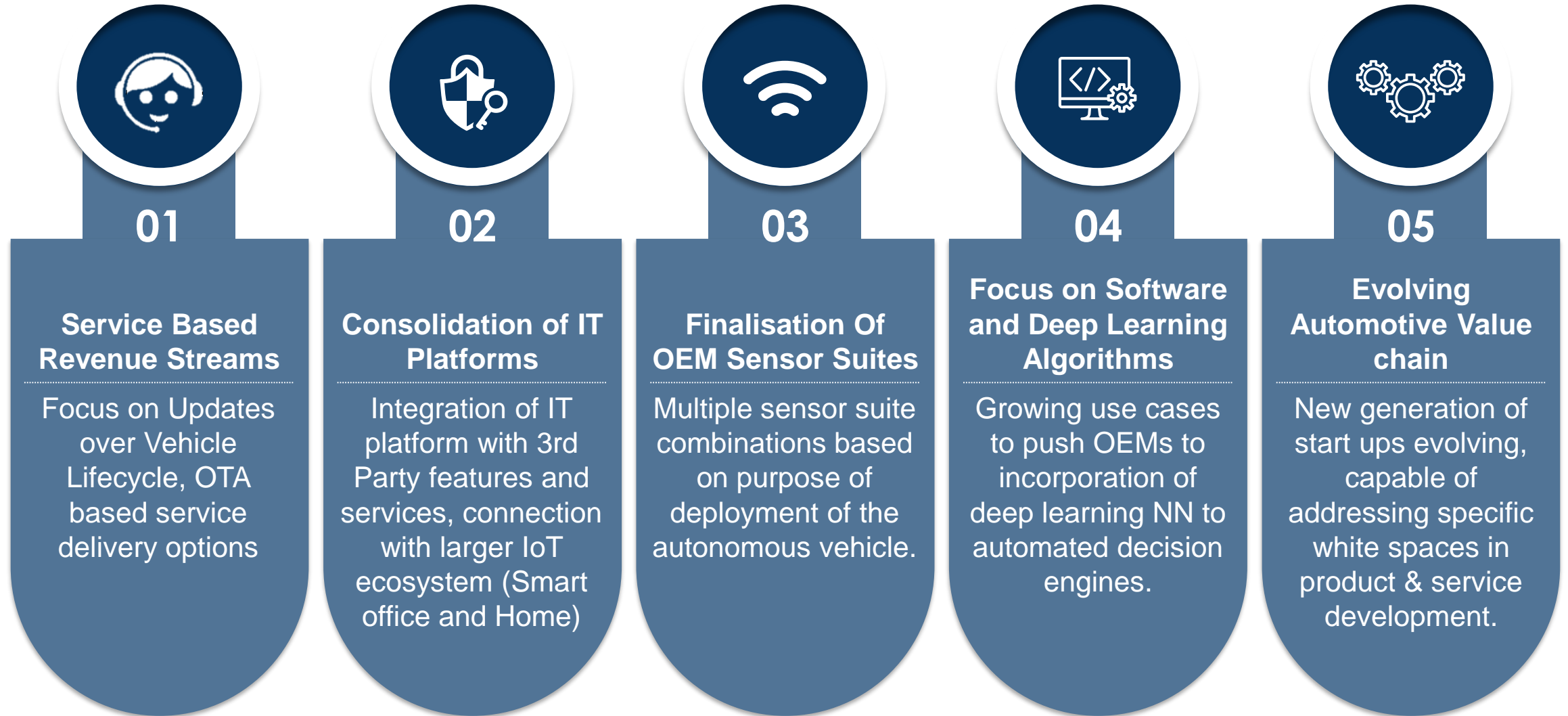
Infotainment



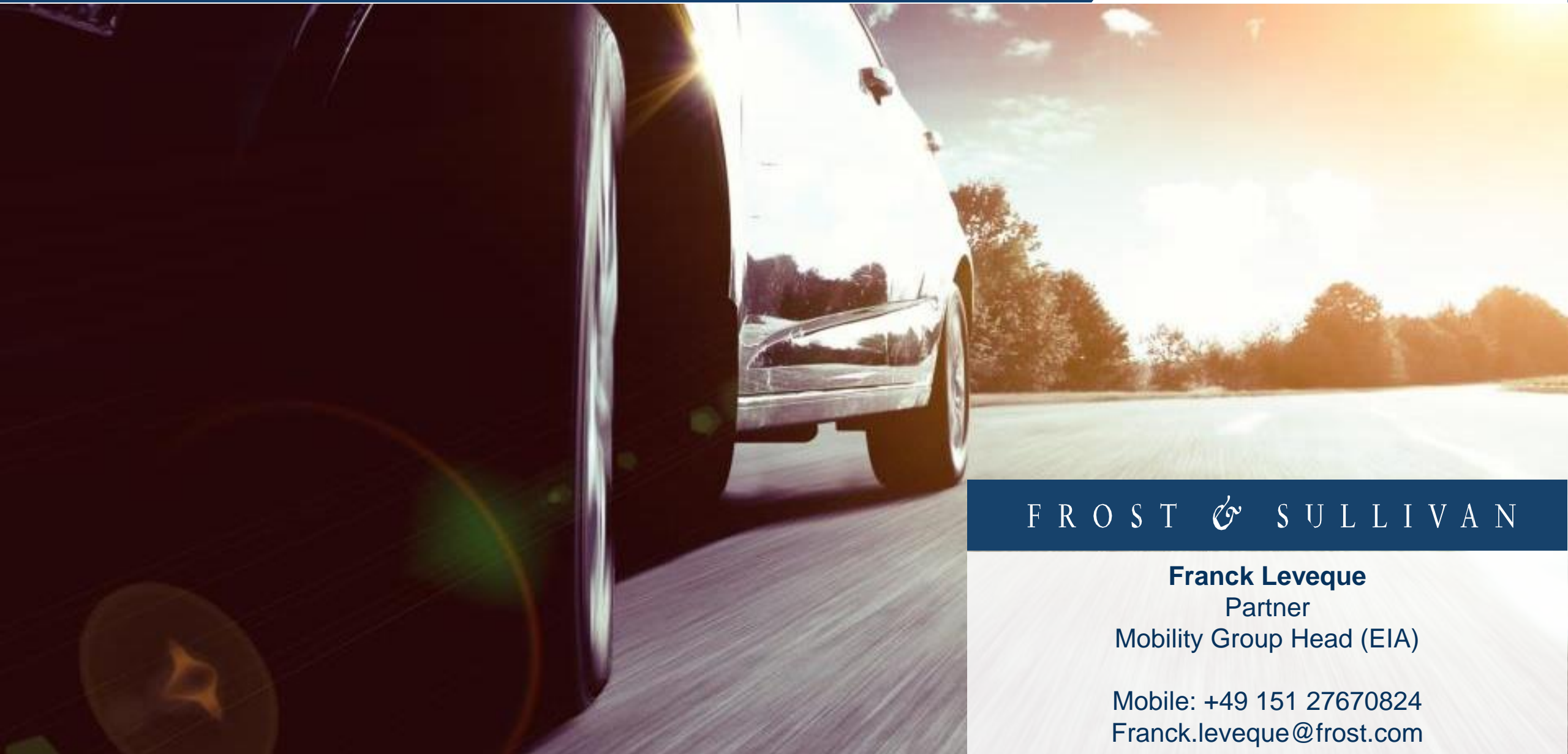
MIPLACE → Convergence Of Technology And Services To Be Essential For Addressing New Business Opportunities



Key Takeaways & Discussion Points



Contact Details for more Information



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