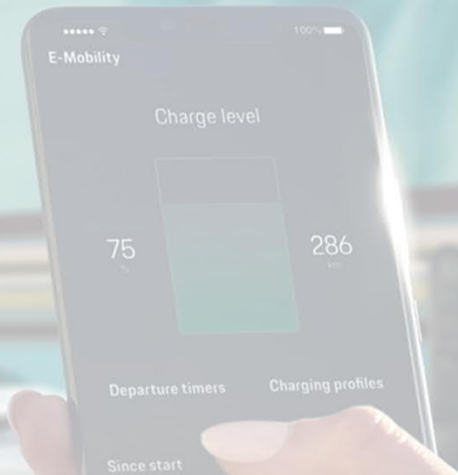


MOBILITÄT VON MORGEN DIE TRANSFORMATION DER AUTOMOBILINDUSTRIE

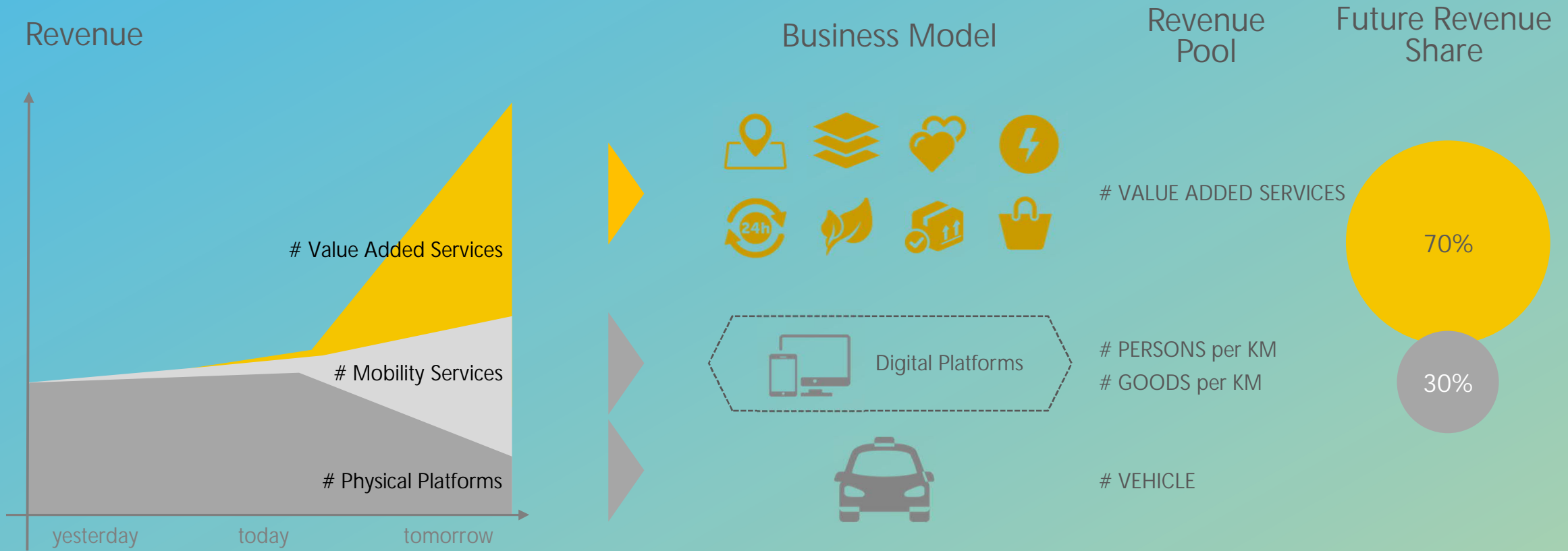
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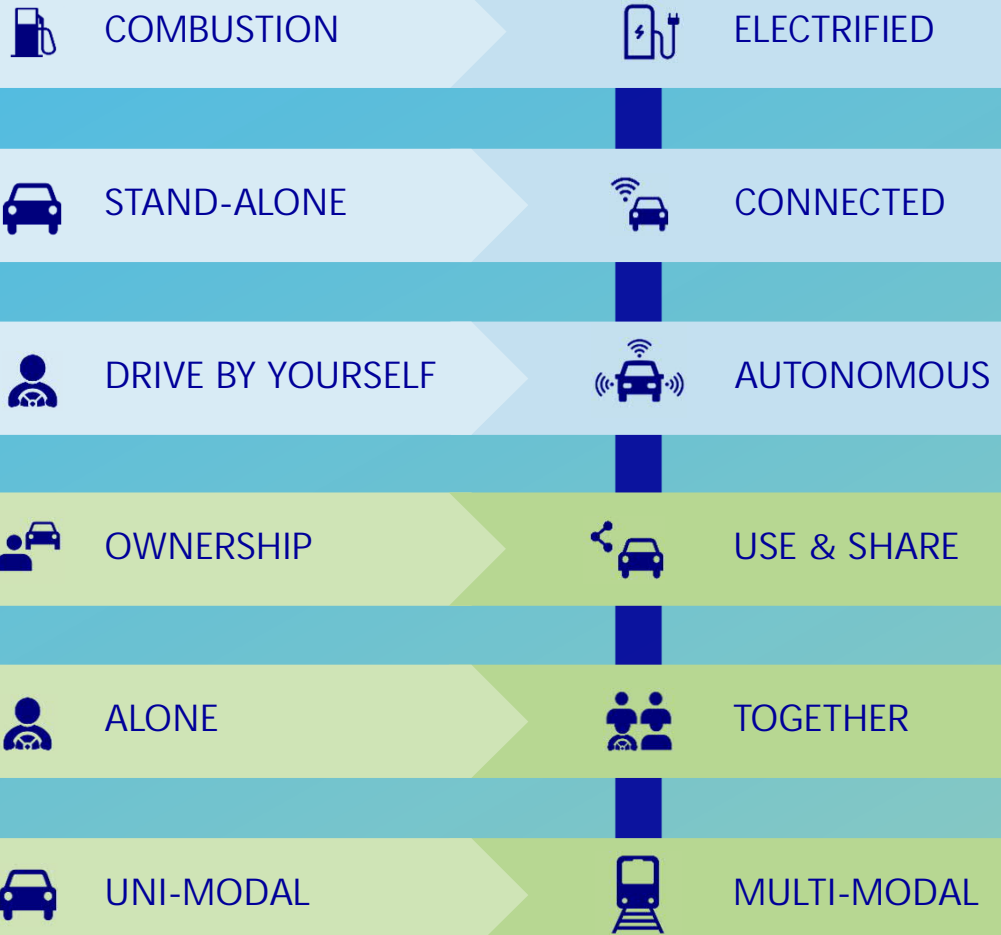
WHAT IS MOBILITY?

“ Mobility is about moving
PEOPLE and **GOODS** in space.

MHP MOBILITY STRATEGY MINDSET.



MHP MOBILITY STRATEGY TRENDS.



„It is all about transactions and the customer interface“



TECHNOLOGY
BEHAVIOR
RURAL / URBAN
ESG GOALS
AND REGULATIONS

MHP MOBILITY STRATEGY RESEARCH. SOFTWARE RACE AND CHINESE OEMS.



Do you consider a chinese brand for your next car purchase?

58%

Global



98%

China



47%

Europe



44%

USA



46%

Germany



ZWISCHENSUMME

■ Yes | Eventually yes

n=5.000; Source: MHP, Motor Presse Stuttgart

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TRADITIONAL OEM



Evolution
of existing
platforms



Develop new
software defined
platforms

NEW OEM



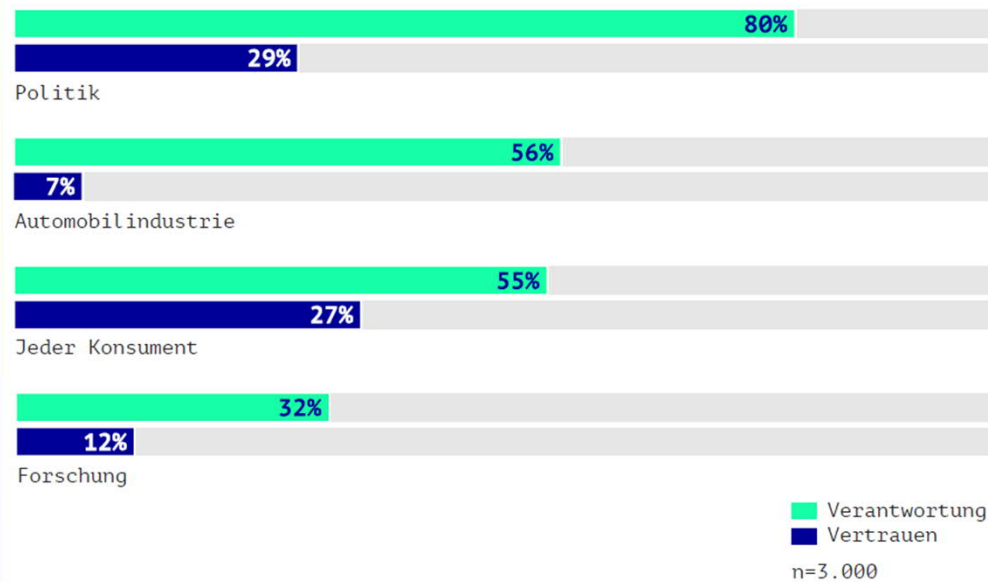
Develop new
software defined
platforms

- No legacy according processes and organization
- Team oriented & skilled on software and high-tech development
- Faster development cycles
- Brand narrative (digital/electric) easens access to venture capital



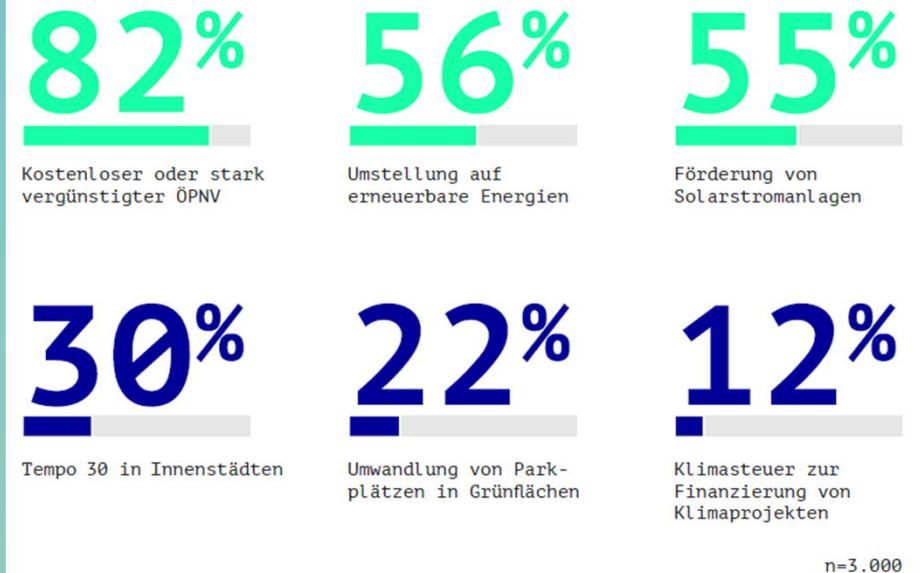
RESPONSIBILITY

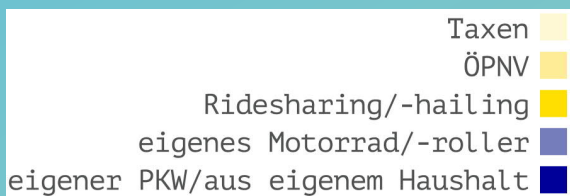
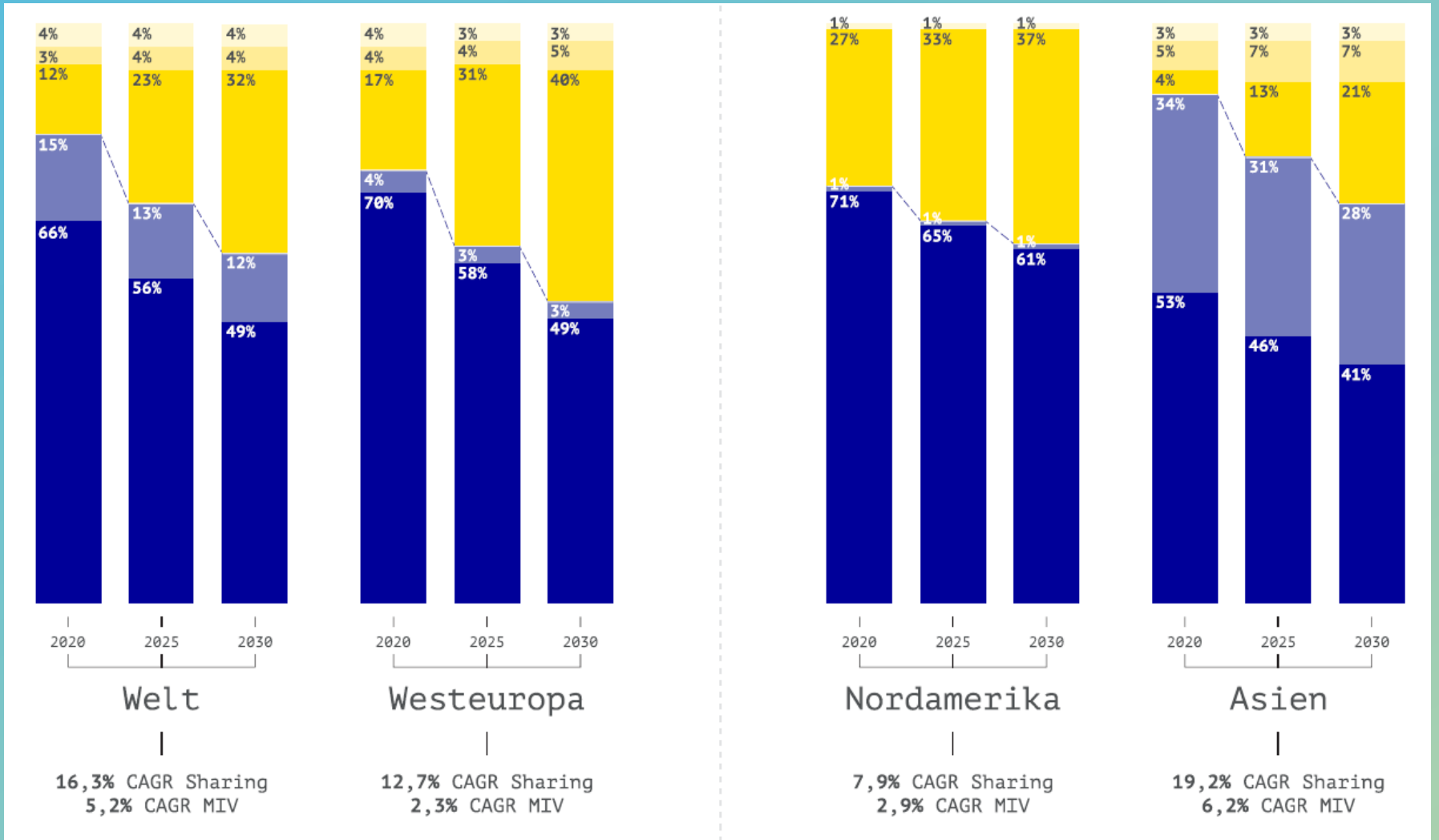
Bitte geben Sie an wen Sie in der Verantwortung für den Klimaschutz sehen. Bitte wählen Sie die fünf wichtigsten aus? Wem trauen Sie den größten Beitrag zum Klimaschutz zu?

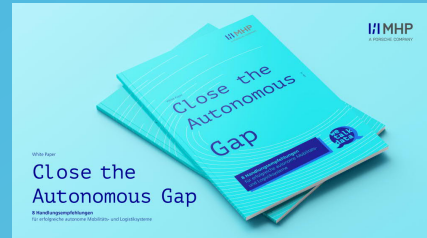


WILL TO CHANGE

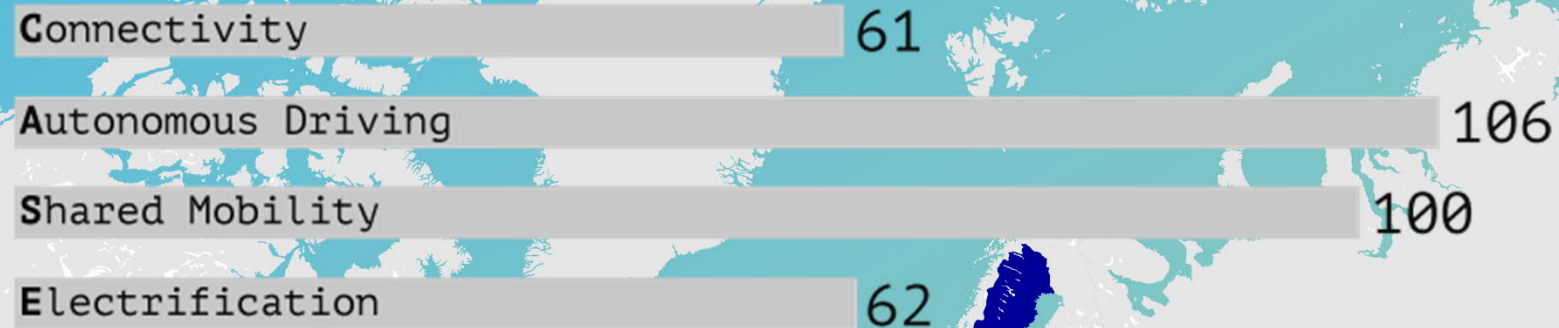
Hier sind einige mögliche Maßnahmen, welche die Städte umsetzen möchten. Welche dieser Maßnahmen würden Sie in Ihrer Stadt akzeptieren?







Worldwide Invest in AD in Billion USD (2010-2021)



Schweden

Großbritannien

Deutschland

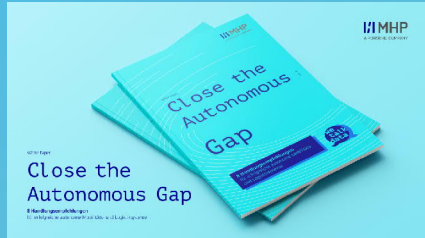
Italien

Polen

USA

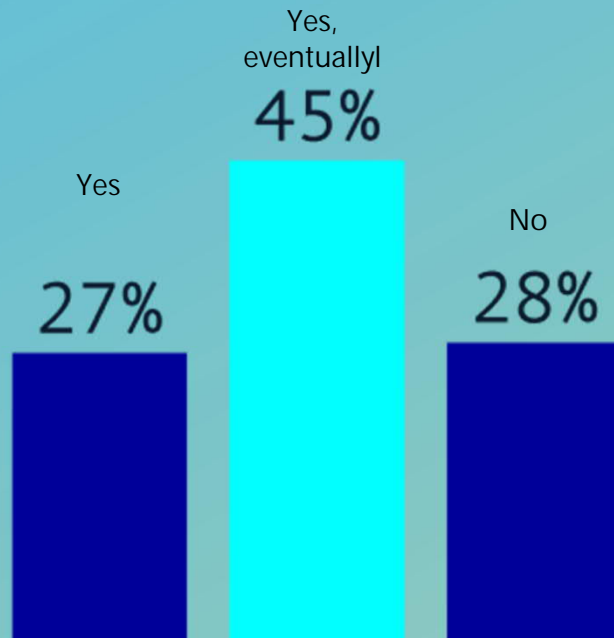
China

MHP MOBILITY STRATEGY RESEARCH. AUTONOMOUS & SHARING.



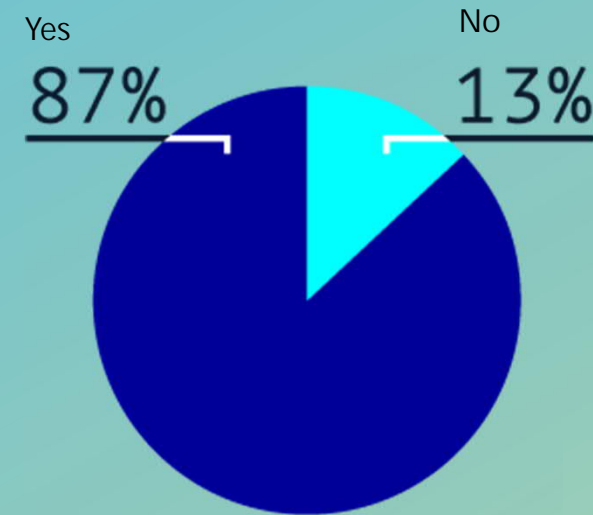
72%

...of all participants in the study could imagine to replace their private car...



...once autonomous driving has become established.

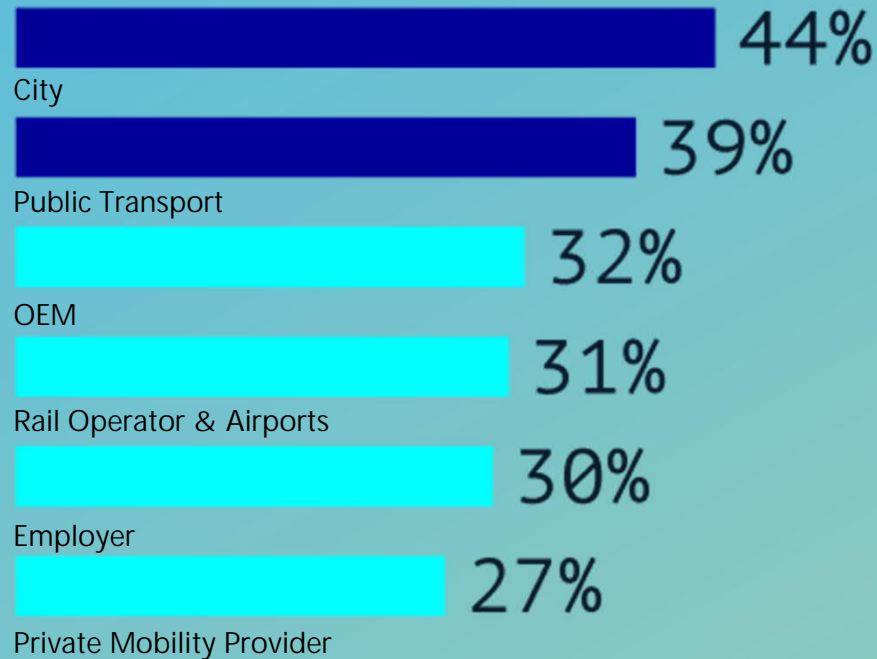
Amongst Sharing users...



SHARING-USERS WON'T COME BACK

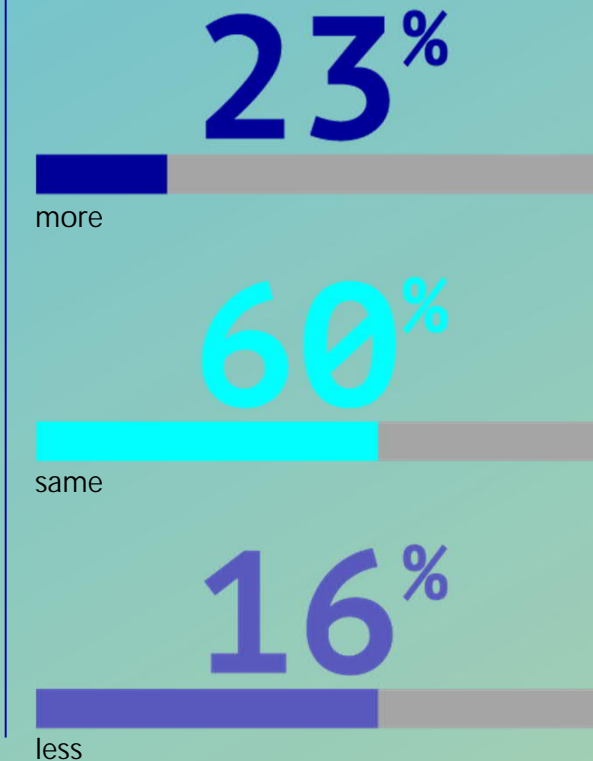


What players would you trust to offer autonomous driving services?



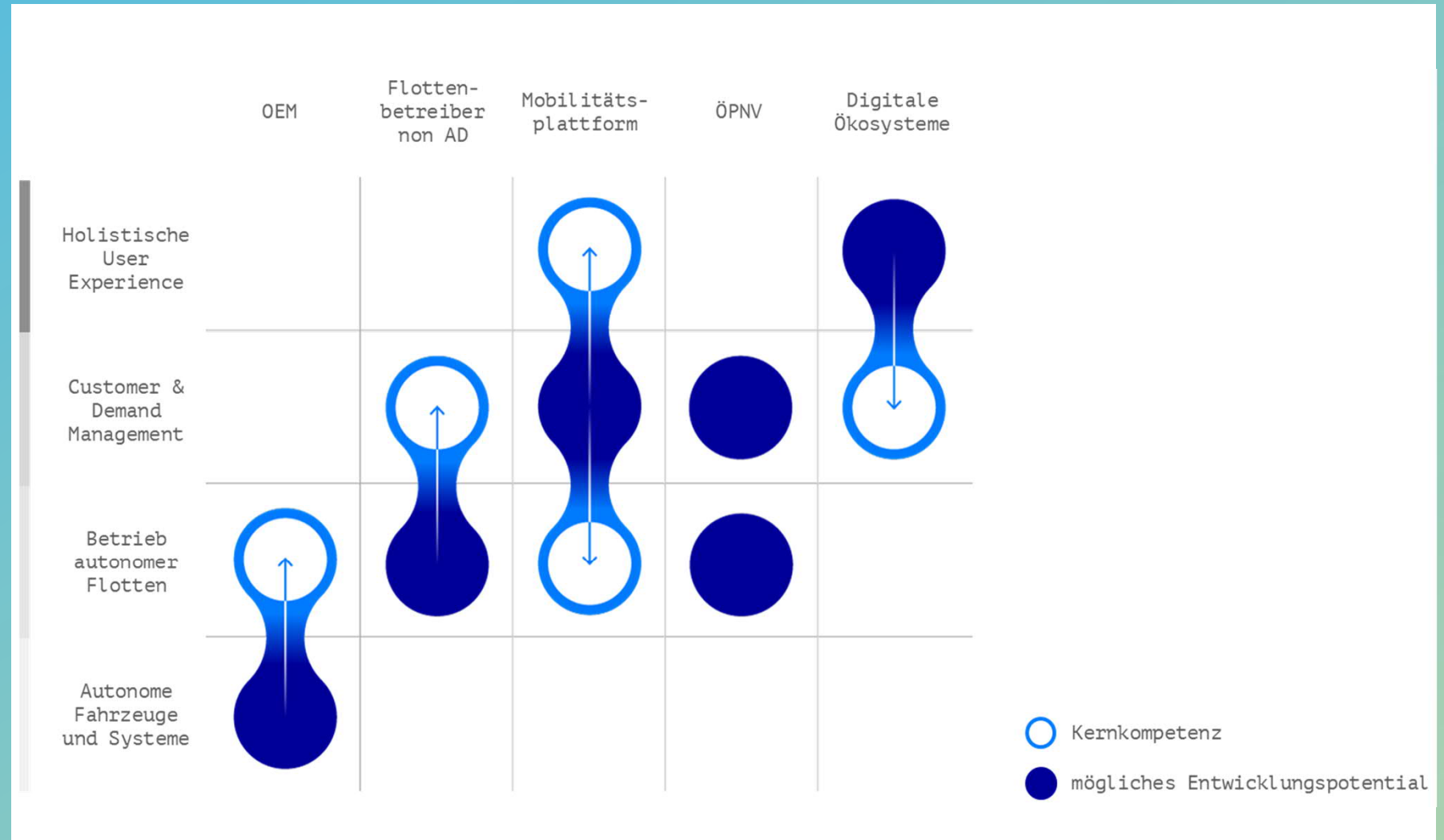
n=4.868 (CN/EU/US)

Compared to a public transport offering I would spend for a ride in an autonomous vehicle ...



THE RENAISSANCE OF PUBLIC TRANSPORT

MHP MOBILITY STRATEGY RESEARCH. AUTONOMOUS GAP.



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