



Capital Market Days 2020

Strategic Action Field: Smart Mobility

Becoming a Leader in Smart Mobility

Ticker: CON
ADR-Ticker: CTTAY
<http://www.continental-ir.com>

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Strategic Action Field: Smart Mobility

Becoming a Leader in Smart Mobility



Smart Mobility Mission

Make transportation more **efficient!**

Make traffic **safer!**

Reduce **total cost of ownership!**

Protect the **environment!**

Add value to the customers' business!

Smart Mobility

Key Statements/Executive Summary

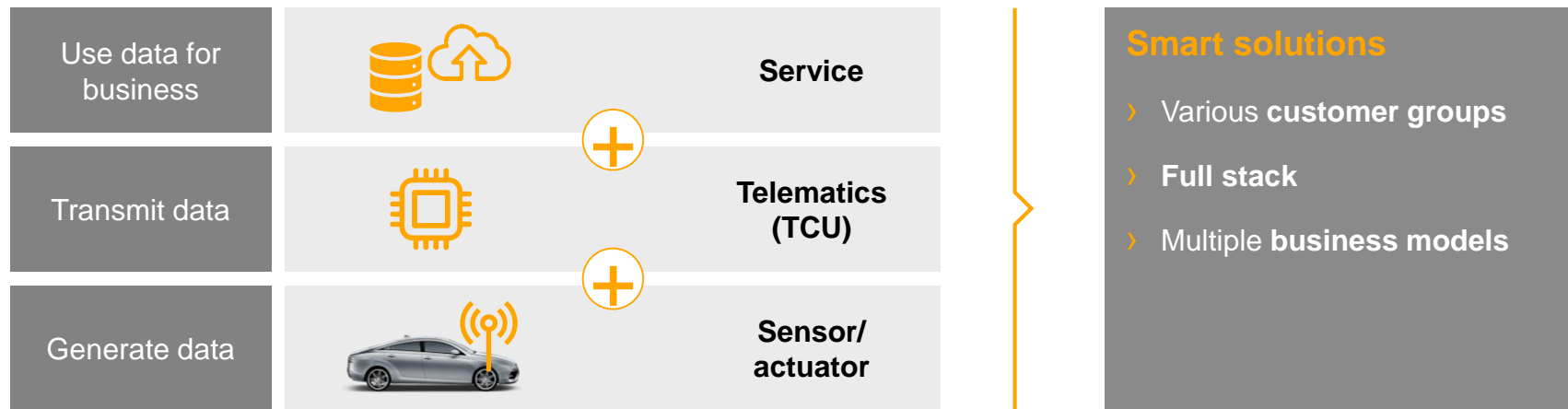
Mobility today partly smart:

Fragmented, most unconnected, island solutions



Smart mobility:

Connects data and uses knowledge to provide insights and recommendations



Growing Need for Smart Mobility Solutions

Converging Requirements & Demands from CV and PV Worlds



Commercial Vehicle Fleet Operators

- › **100% of trucks connected**
- › **Digital logistics** value chain drives CV **fleet services**
- › **Big data – analysis of data** across brands, vehicle types, sensors and markets

Growth Drivers

Digital logistics
value chain

Regulations –
safe, clean & fair

New mobility
business models

Orchestrator
solutions –
cross-technology



Private & Fleet Operators of Passenger Vehicles

- › **New business models** like sharing & hailing disrupt mobility
- › Fleet vehicles managed as **investment goods**
- › Demand for **Total cost of ownership (TCO)** reducing services

Key Challenges of Smart Mobility

Our Capabilities and Solutions Provide Customer Value

Customer
Challenges >



Scattered landscape
of independent
elements

Continental
Solutions >

**Modular full stack
solutions and systems**
from sensor to service



Difficult to interpret
data from a multitude
of sensors and
actuators

Longstanding **experience**
working with and profound
understanding of
automotive sensors,
actuators and computing



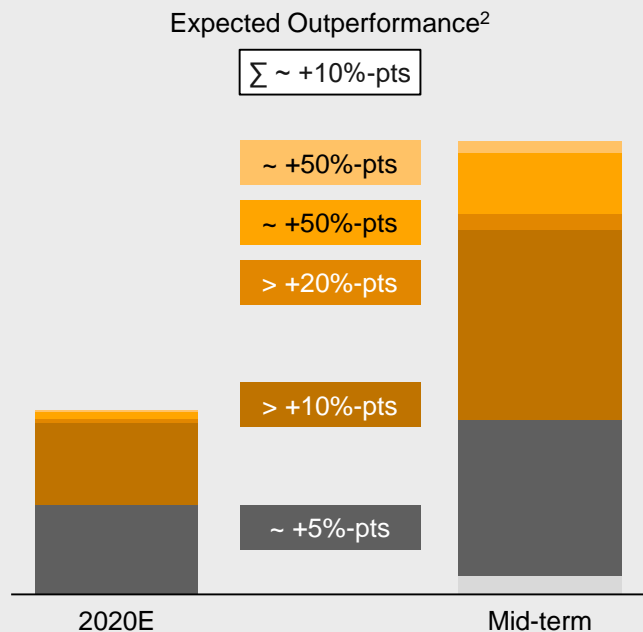
Necessity to use
several solutions
in parallel

**Holistic end-to-end
integrated systems**
providing superior insights
in an easy-to-use solution

Smart Mobility

Comprehensive Portfolio of Solutions to Drive Strong Growth

Sales in Action Field¹ (€)



Remote Vehicle Data

- › Cross-brand vehicle data access solution

Key as a Service

- › Established OE and fleet smartphone integration for car access

eHorizon

- › Proven OE integrated solution for CO₂ and fuel consumption reductions

Fleet Management Solutions

- › Solid position in fleet management provider in NA and EU

Digital Tachograph

- › Established business in tachographs in EU and future trust center

Other

¹ Based on mid-term IHS light vehicle production (LVP) forecast from November 2020

² Mid-term organic sales growth above IHS LVP

Comprehensive Smart Mobility Solutions

Expanding Offerings to Cover Needs of Diverse Customer Groups

Customer Groups	CV OEMs	PV OEMs	Logistics Fleets	Mass Transit	Vocational & Off-Highway Fleets	Breakdown Service Providers	Workshops & other AM Applications	Mobility Fleets
Fleet type	CV Fleets					PV Fleets		
Continental Solution	<ul style="list-style-type: none"> ★ Key as a Service 				<ul style="list-style-type: none"> ★ Remote Vehicle Data 			
	<ul style="list-style-type: none"> ★ eHorizon 	<ul style="list-style-type: none"> ★ Remote Vehicle Data 	<ul style="list-style-type: none"> ★ Key as a Service 		<ul style="list-style-type: none"> ★ Key as a Service 			
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★ In the market ☆ In development

Digital Tachograph

The Trusted Data Center in the Vehicle



Product



- › Tracking of **driving and rest periods**
- › Transmit **speed, driver and weight information**
- › Ready for **cabotage, on-board weighing and CO₂ regulation**

Benefits for customers



- › **Compliance** with all regulations, e.g., EU Mobility Package I & II – **mandatory** for each truck
- › Secured **against manipulation**
- › Store safe and secure in our **secured network**

Continental positioning



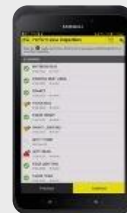
- › **Established business** in the EU
- › Trusted supplier of **easy-to-use solutions**
- › **Deep vehicle integration**
- › **THE trusted data center** for all future applications

Fleet Management Solutions – Logistics and Vocational

Reduce Total Cost of Ownership



Modular and holistic end-to-end solutions to **reduce the total cost of ownership**



Product



- › Precise **routing and tracking**
- › Actionable **reports and dashboards**
- › **Driver efficiency** scoring and coaching
- › **Verified pre-trip inspections**

Benefits for customers



- › **Analyze fleet and business data** to optimize processes
- › Increase **driving efficiency and save fuel**
- › Improve **driver safety**

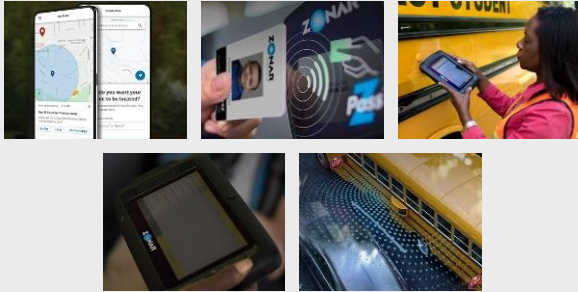
Continental positioning



- › With the **ZONAR** brand solid position in fleet management
- › **Vehicle knowledge and integration** is essential for the future full digital logistics chain

Fleet Management Solutions – Student Transportation

Protect Students Lives as Unlimited Value



Product



- › School bus tracking for **student safety incl. ridership app**
- › **Verified inspections**, incl. sanitation in a pandemic
- › **Stop arm camera** safety program

Benefits for customers



- › Protecting the lives of **~10 million children** in North America every day
- › Peace of mind for **parents**

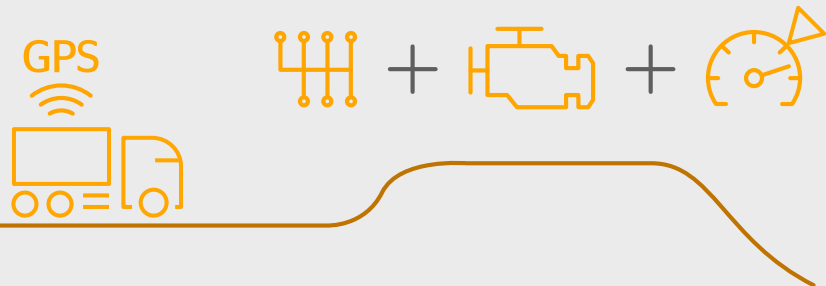
Continental positioning



- › Building on **established market position** in integrated safety solutions for school buses
- › **Full system solution** for school districts

eHorizon Solutions

Environmental Protection Meets Fleet TCO Improvement



Product



- › Automatically **set gear, engine characteristics and speed**
- › Use information on **road profile ahead**
- › More **integrated and connected data model** includes traffic and road condition information

Benefits for customers



- › Saving **>10,000 liters diesel** in the lifetime of a truck
- › **>1.8 bn liters diesel saved¹**
- › **>4.6 mn tons CO₂ reductions¹**

Continental positioning



- › **Established and proven OE integrated solution**
- › **Automatic and reliable reduction** of emissions and fuel consumption

¹ Cumulated over lifetime | Sources: own estimates

Key as a Service

Continental Creates Mobility Experience



Access
Enables vehicle
access across
multiple OEMs



Data
Accurate In-Car
Telematics

0101011
1101010
10101101010110
1011010
10101



Location
Accurate Vehicle
Position



Aftermarket solution
Retrofitting for multiple
OEMs

Product



- › Provide **access and start authorization** via smartphone
- › Secure **cloud back-end and highest security** standard
- › **Short loop communication**

Benefits for customers



- › **Smartphone Access** will be standard in the near future
- › Coverage across **various OEs – factory and aftermarket**
- › **Significantly reduce effort and costs** for service delivery

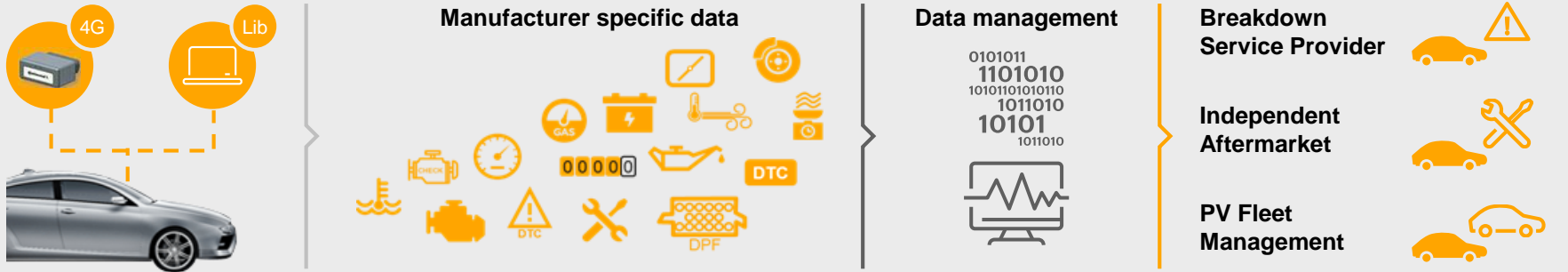
Continental positioning



- › **Solid position** for OE installed car access systems
- › **Established in several car sharing fleets and roadmap for rollout** in execution
- › Already generating **20k keys per day**

Remote Vehicle Data

Diagnostic Data to Enhance Fleet Business Models and TCO



Product



- › Access to **comprehensive manufacturer specific vehicle data**
- › **Coverage** of various OEMs
- › **Predictive maintenance** enabler

Benefits for customers



- › Increased **uptime** and reduced **breakdowns**
- › Improved **service quality**
- › **Significantly reduce effort and expenses** for service delivery

Continental positioning



- › Continental with an established **position in vehicle electronics** is mastering all information in and around the car already
- › **Solution active** in the market

Cooperation Across Continental

Enabling Integrated Solutions

Coming from tires



Offering tires



Single services



Bundling single services

Moving to selling value

Embracing digitalization

ContiPressureCheck™

ContiConnect™

Intelligent tire

Step to Solutions Provider

Heading toward



Integrated solutions provider

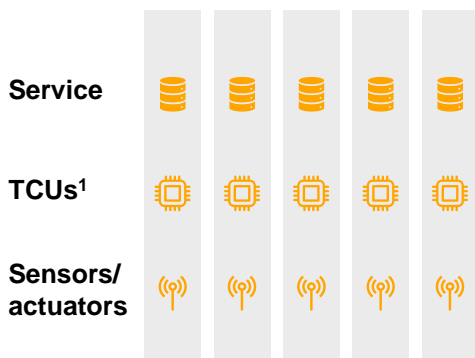
- › Industry development from products towards selling **integrated smart systems and services** – extracting **added value**
- › Continental as **only integrated Tire and vehicle electronics player** is positioned to provide these solutions

Continental Established in Full Stack

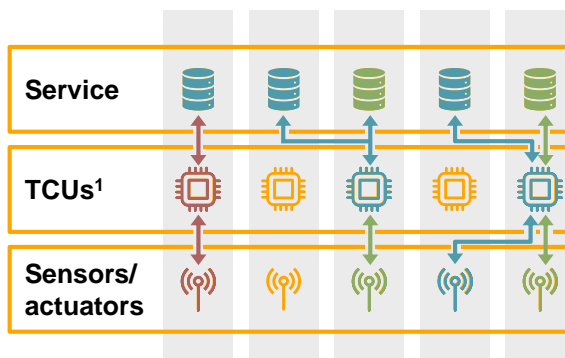
Modular Architecture for More Service Opportunities



Vertical stand-alone architecture



Horizontal coherent and modular building blocks



Past

Future and Continental's offering

Established service

Existing back-end infrastructure and running services (ContiTech, fleet management system, Tire information system)

Solid market position for TCU¹

OB²-II Dongle in production
Solid position in 3G, 4G, 5G telematics
Established in digital tachographs

Large portfolio of sensors/actuators

Bluetooth low energy, tire sensor, door-access-controls, on-board weighing, NOx sensor

¹ TCUs: Telematic Control Units
² OBD: On-board diagnostics

Becoming a Leader in Smart Mobility

We Enable the Vehicle as a Commercial Asset for the Fleet!



Digital logistics value chain

Massive efficiency gains in B2B through fully digitized logistics chain enabled by Continental solutions

Regulations – Safe, clean and fair

Trusted supplier of easy-to-use solutions covering all regulations on environment, safety and compliance

New mobility business models

Key enabler for new business. Significantly reduced effort for service delivery. Full TCO management based on insights

Orchestrator solutions – Cross-technology

Superior understanding of the vehicle combined with system integration capability as key differentiator

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The Future in Motion