



- TechTalk **SMART MOBILITY**

The background is a light gray with a network of white dots connected by thin white lines, resembling a molecular or digital structure. Overlaid on this are several orange dashed lines that curve across the frame, suggesting a path or trajectory. A semi-transparent gray rectangular box is positioned behind the main title.

SMART MOBILITY: GROWTH DRIVERS AND CHALLENGES

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Smart Mobility: Emergence of a Major Business Area

Fleets, connectivity & new mobility drive demand for services

Sharing & Hailing



- › New business models disrupt mobility
- › Potential for **car data services**

Emergence of PV Fleets & CV Fleet Digitalization



- › New business models enable **PV fleets**
- › **Digital logistics** value chain drives **CV fleet services**

Automated Cars, Trucks and Off-Highway Vehicles



- › Assisted cars spread, **L4-5 HAD CV highway & OH** applications
- › **Data needed & services enabled**

Networked Mobility & Cities



- › **Cities & vehicles** to be fully **connected**
- › **Optimization & multimodal transportation**

€145 bn.
new value
creation by
2030

Growing Need for Smart Mobility Solutions

Converging requirements 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

Growing Need for Smart Mobility Solutions

Automated Driving & Off-Highway drive demand



Automated Driving

- › Use Cases in confined areas, e.g. **driverless Hub2Hub**
- › Commercial Viability: Increased 24/7 availability reduces TCO
- › **Future Assistance** systems move towards level 3
- › Streamlining of regulations through UNECE

Growth Drivers

Driver shortage

TCO reduction in competition

Increase Work Efficiency

Growth in certain areas



Off-Highway

- › Strong value-adding potential of new technologies such as AI
- › Large efficiency potentials
- › Significantly more **safety**
- › Growth in building sector
- › Fulfillment of **sustainability** goals

Smart Mobility

Key products and services



Remote Vehicle
Data Fleet Solutions



Fleet Management &
Legislative Services



eHorizon &
Map Data as a Service



Wrong Way
Driver System



Key as a
Service

Service
Enabling
Technologies

**Smart
Mobility**

Applied
Mobility
Technologies



Autonomous
Mobile Robots



Smart Road
Infrastructure



Tachograph

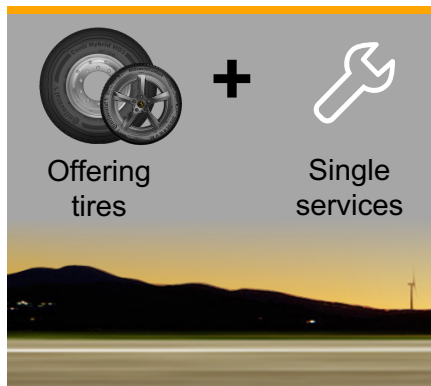
Cooperation Across Continental

Enabling integrated solutions



Heading towards

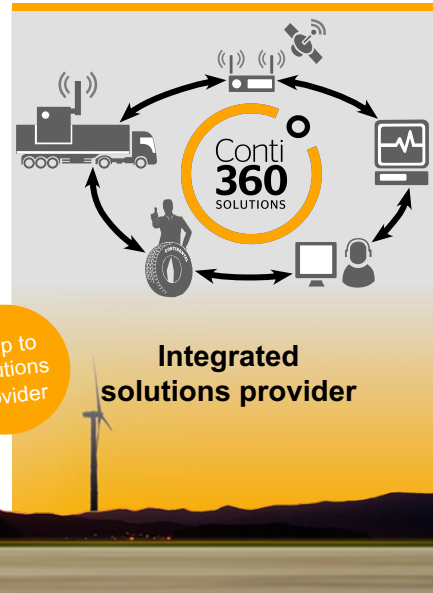
Coming from tires



Moving to selling value



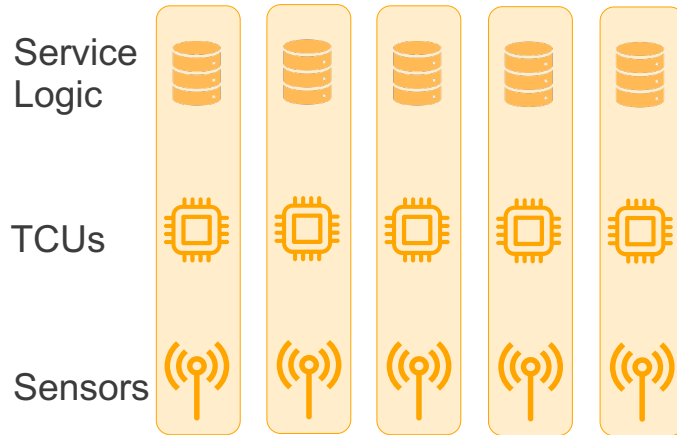
Embracing digitalization



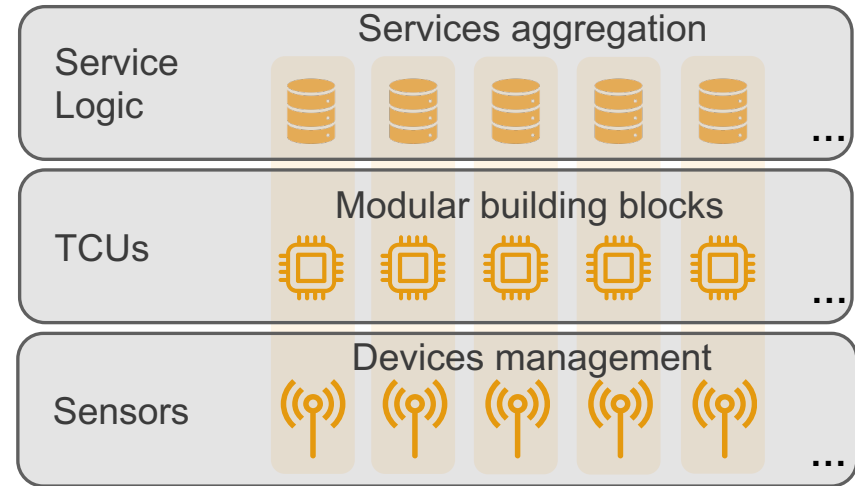
- › Industry development from products towards selling **integrated smart systems and services** – extracting **added value**
- › Continental as **only integrated Tire and vehicle electronics player** is positioned to provide these solutions

Enabler: A Shift in Service Architecture

From stand alone architecture to modular building blocks



Vertical stand alone architecture



Horizontal coherent and modular building blocks

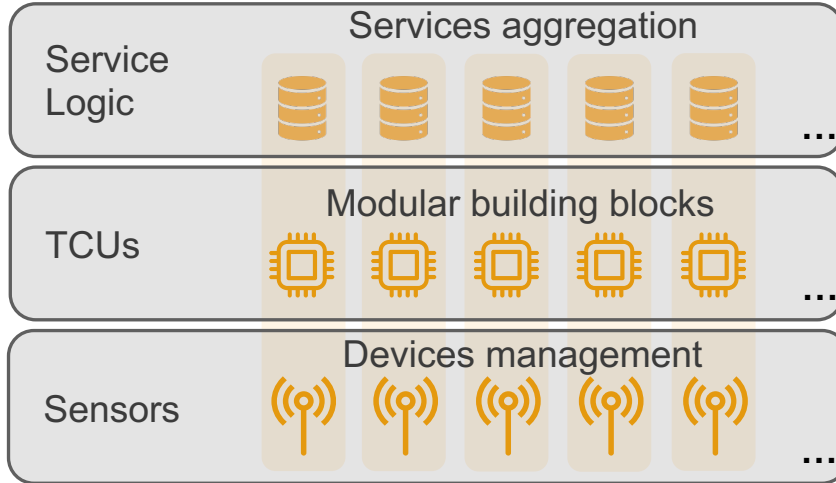
TCUs: Telematic Control Units

PAST

FUTURE

A Shift in Service Architecture

Continental's value proposition



Established **Service Logic**:

Existing Back-End infrastructure and running services



Strong Market position for **TCU**:

OBD-II Dongle in production
Excellent Position in 3G, 4G, 5G Telematic
Smart DTCO



Wide Portfolio of **Sensors**:

BLE, TIS, UWB, Access On-Board Weighing,
NOx-sensor

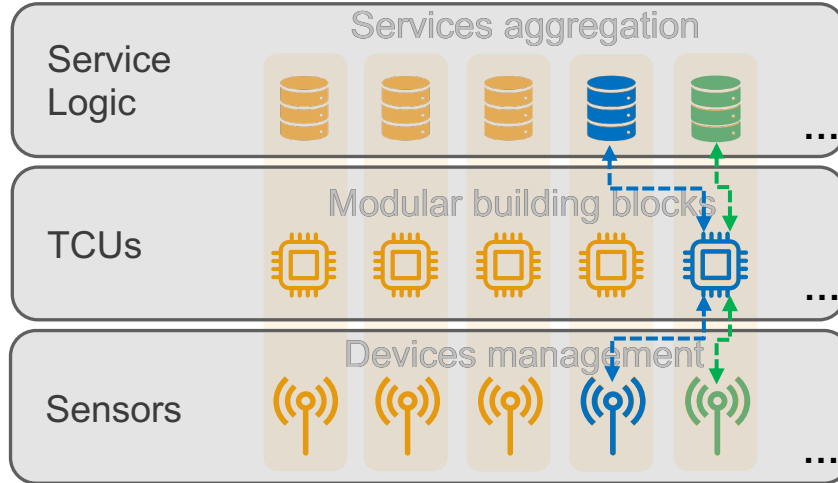
Horizontal coherent and modular building blocks

Integrated Smart Mobility Solution

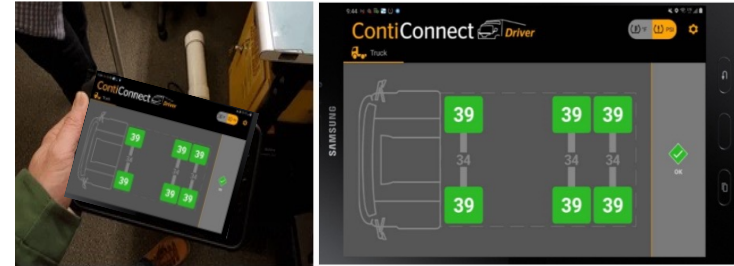
Centre of service excellence



FMS  Tires



Horizontal coherent and modular building blocks



THANK YOU!