



What happens when users will consume services rather than own vehicles?

As software service platforms revolutionize the mobility industry, all players must excel in five areas to compete in the 2030 ecosystem.

- 1** Focus on a holistic organizational transformation
- 2** Create a positive customers' experience
- 3** Organize data to improve analytics
- 4** Ensure execution on forecasting
- 5** Deliver sustainability

CASE is driving the creation of new future personal mobility ecosystem services

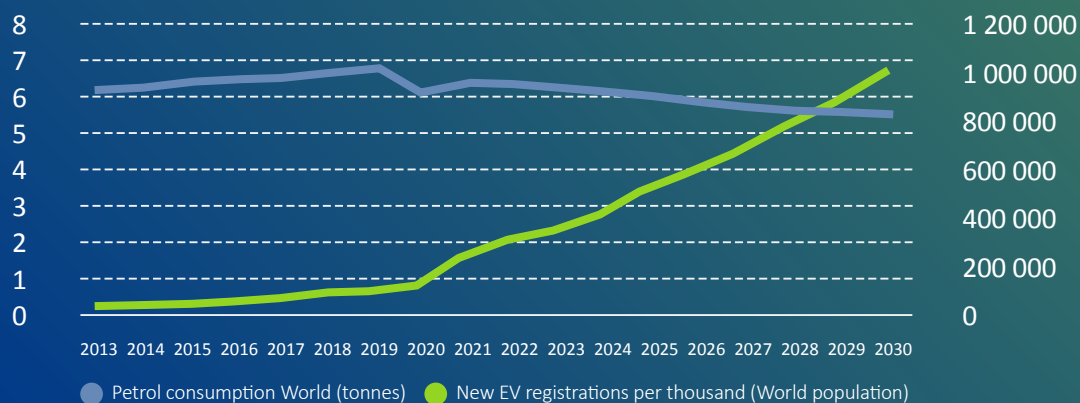
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Connected
 A connected car is a passenger vehicle with an embedded Internet connection, powered by WLAN or 5G (4G) connectivity.
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Autonomous
 An autonomous vehicle (Level 5) is a vehicle that can drive itself to a predefined destination without any direct involvement from the driver.
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Shared
 More and more consumers in established markets give preference to "renting" versus "ownership".
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Electric
 Electric vehicles (EV) are the key technology to decarbonize road transport, a sector that accounts for around one-sixth of global emissions.

By 2030...

- 85%** of survey participants expect their mobility choices to benefit their health and security.
- 80%** of survey participants expect to use a single app or platform for all mobility services (billing, ordering, and multi-modal transportation).
- 50%** of survey participants will sacrifice vehicle ownership to improve sustainability.
- \$85bn** is expected to be reached in the global automotive software and electronics market revenue.
- \$1.2trn** will be invested in sustainable power trains approximately.

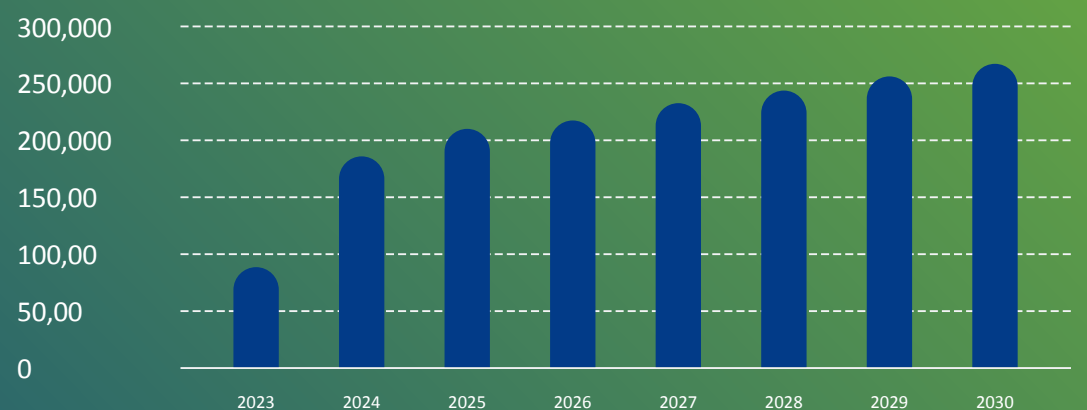
Global petrol consumption has been falling while new EV registrations are continuing to rise

New EV registrations per thousand population (world) vs Petrol consumption tonnes ('000) (world)



Global OEM Software Development FTEs

Global Software Development FTEs in automotive OEMs will more than double by 2030 as they transform themselves into technology and software businesses



The study is based on BearingPoint's research, the views from clients across all industry sectors, and input from sector and technology leaders from throughout the firm. It is part of a series of insights and research that are being published regularly.