

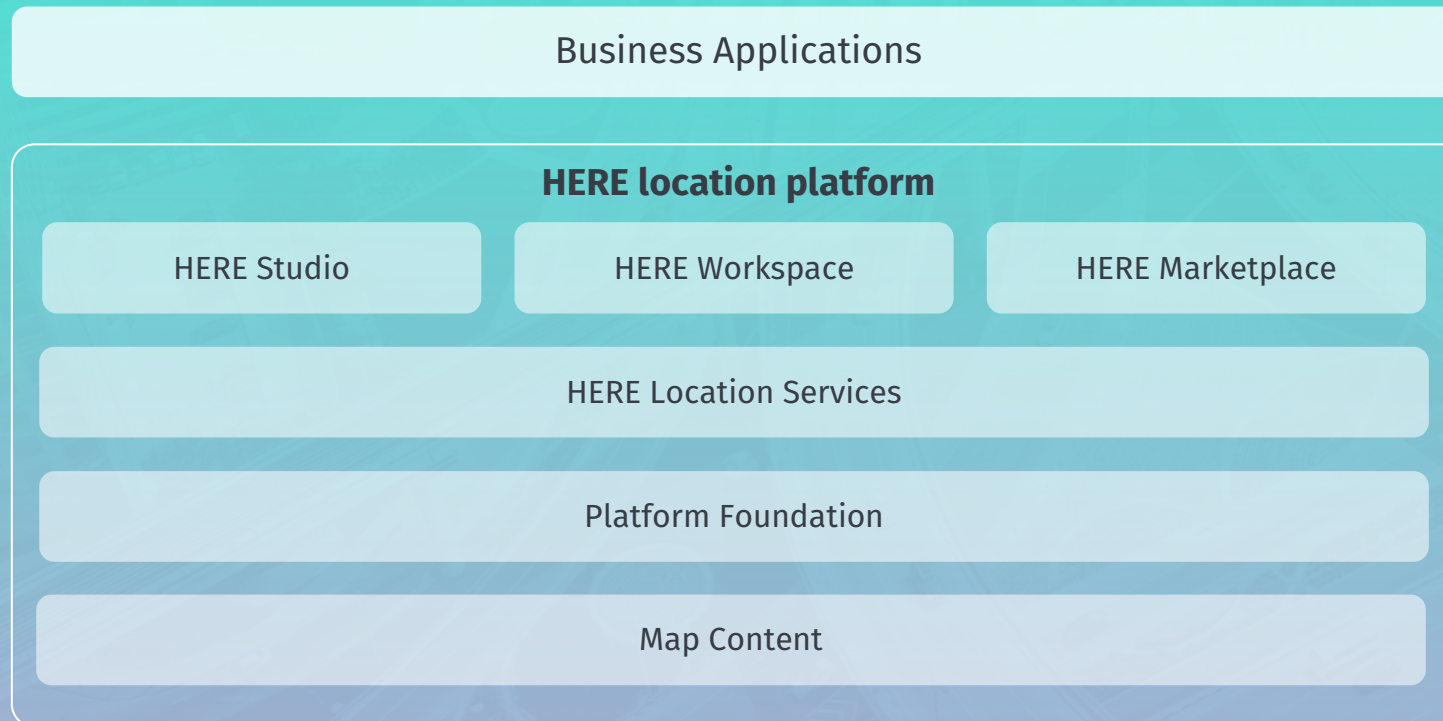
Driving efficiency gains and new revenue streams

HERE Technologies, June 14th 2022

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We're the world's #1 location data and technology platform

According to Omdia, Counterpoint Research and Strategy Analytics, 2021/22



HERE location platform in numbers

48 

serving **use cases**
across multiple
industries

356k 

direct
developers

3m 

indirect
developers

80b 

API calls
per month

1.6k 

cities with transit routing
in over 50 countries

+150m 

vehicles with HERE
maps on board

+200m

points of interest 



Location technology opens up new opportunities in multiple industries and markets

Industries (verticals)



Automotive



Transportation & Logistics



Tech, Media & Telco



Retail



Public Sector



Finance & Insurance



Manufacturing



Accommodation & Food Services



Healthcare

Markets (use cases)



Fleet Management



Supply Chain



Urban Mobility



Connected Driving



Automated Driving



Infrastructure Planning



Public Safety

New Revenue Streams

Shifting revenue pools

SDV is a bracket around all future growth areas in Automotive E/E

Automotive is already a software business – and this will gradually also apply to commercial vehicles.

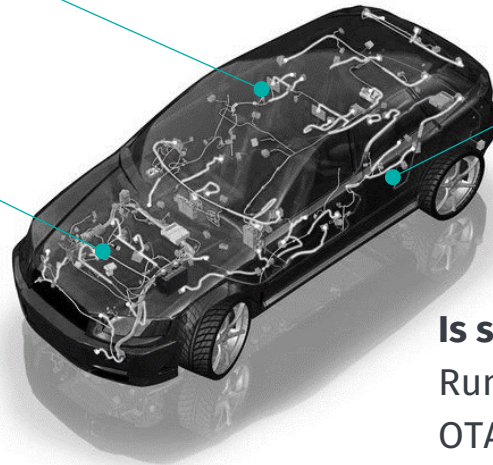


Has a Digital Cockpit and Digital Cabin

Combines navigation with safety, convenience, infotainment and entertainment

Is Automated

>60% of new cars to have at least L2 capability by 2026



Is software-defined

Runs own OS on a central high-power computing platform, OTA software and feature upgrades throughout lifecycle



Is Electric

Most Vehicles developed countries will be EV/PHEV or be built on a “EV ready” platform

By 2030, 50% of the market will have either domain-centralized or zonal/central E/E architectures



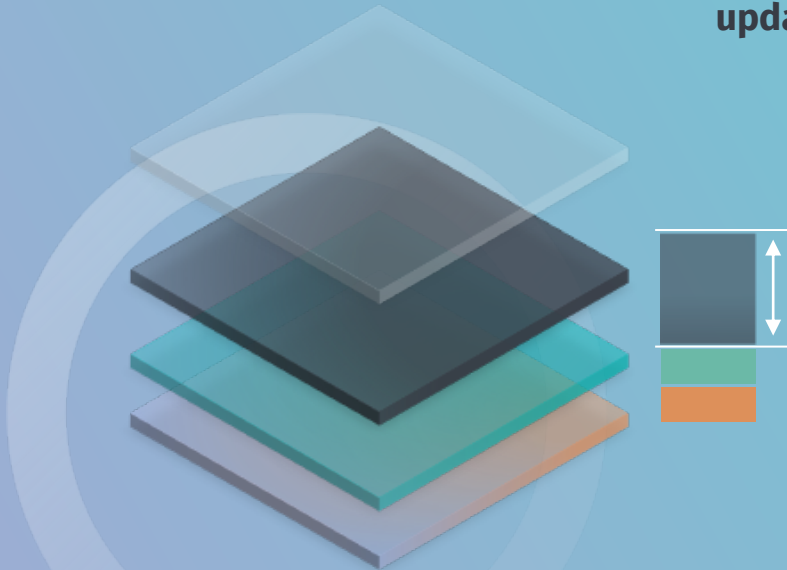
... and forces OEMs and suppliers to focus on the entire lifecycle

Imperatives to access new revenue pools

Providing scalable platforms

Headroom for updates & upgrades

hardware
software
connectivity



Owning the user experience

Critical control points & channels

vehicle & user data
monetization channels
digital brand



Vehicle sales and traditional aftersales revenue going down

Growing opportunity to monetize the digital consumer experience



Electric autonomous vehicles will strongly impact global car sales

- increased durability
- lower maintenance
- much higher utilization



Digitization & connectivity opportunity to...

1. monetize the in-vehicle experience

- advertising
- non-transport related services
- transport related services

2. enable savings & efficiency gains

- online car sales
- OTA updates
- remote diagnostics & maintenance



"The Trinity platform will come with all the sensors and hardware in 2025 that will enable L4 by 2030. [Charging] €7/hour for L4 driving appears like a realistic figure."



"Tesla Full Self Driving subscriptions are now available for \$199 a month."

"Hands-Free Driving Tech Comes to New Ford F-150, Mustang Mach-E. But You Have to Subscribe"



Driver interaction

Needs



New services and experiences, including third-party and EV services



Use map as canvas for services to be consumed when not driving



Services relevant to the journey and the destination



Driver interaction



Solutions



Indoor/parking experiences, including EV charging



On-demand and in-vehicle provisioning of services



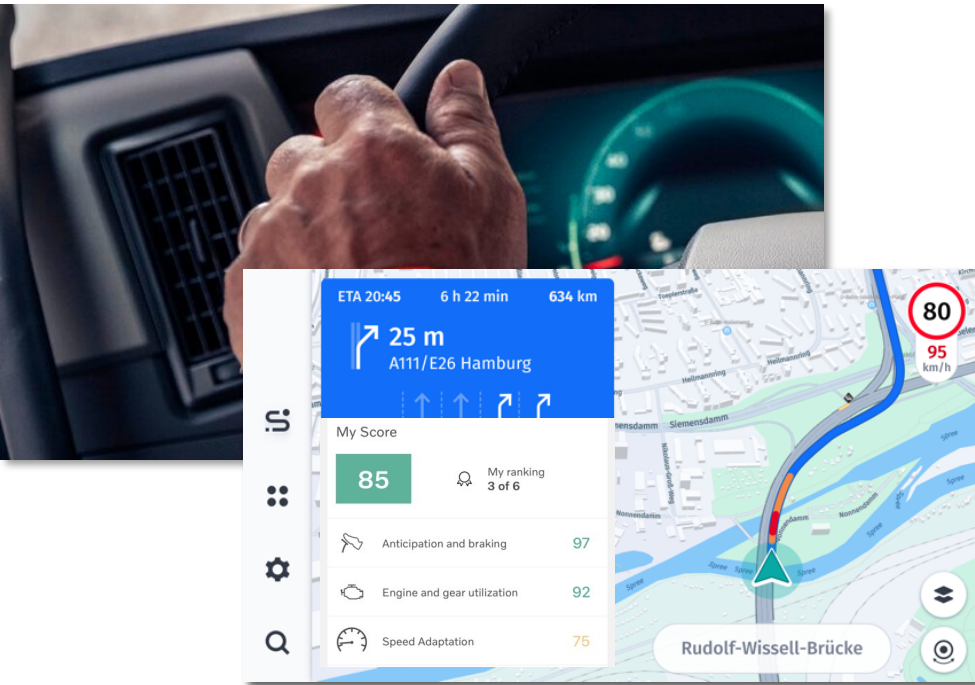
Platform to create location-based services and experiences on the map

IVI as ideal canvas, also for fleet use cases

Example HERE Navigation: added features and services as opportunity for new revenue streams

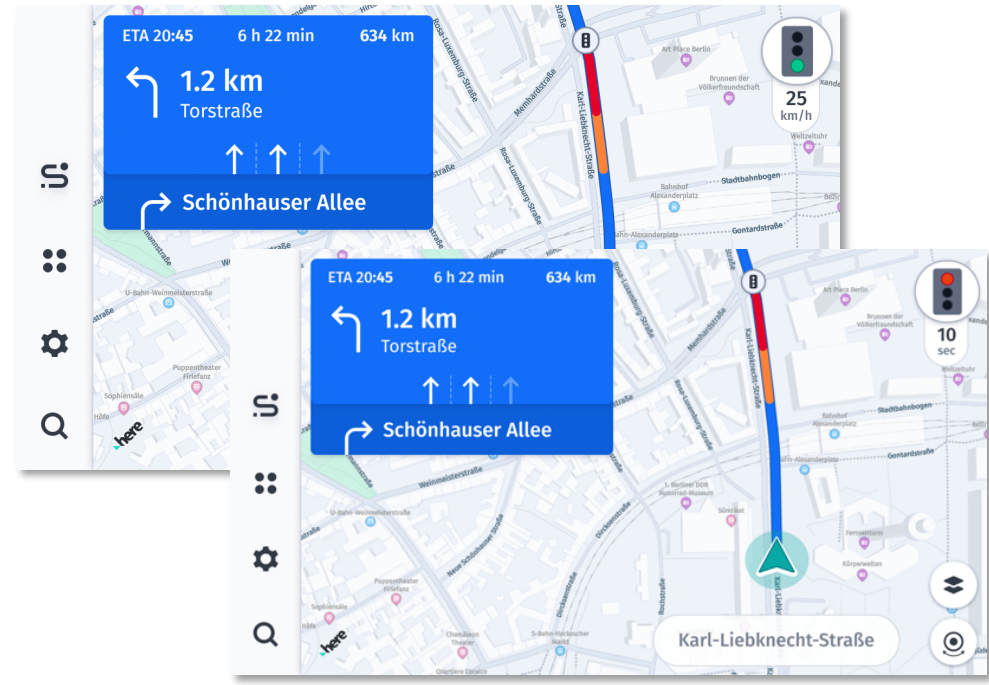
Driver Development

Driver Development Service Package



Personal Signal Assistant®

service by Traffic Technology Services (TTS)



Opportunities in commercial vehicle fleets

Efficiency up

Automated and Connected Driving

Location is key to addressing major challenges for truck OEMs and fleet owners/managers

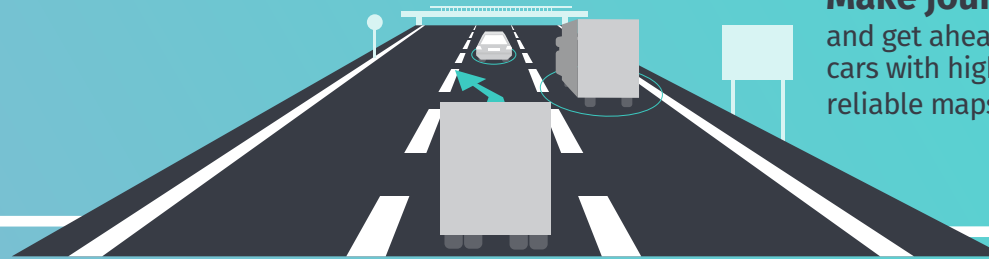
Plan for an efficient journey

Improve on-time performance and efficiency with dynamic route optimization



Make journeys safer

and get ahead of the curve on automated driving cars with high-definition, „always fresh“ and reliable maps



Unlock data service revenues

and derive insights with predictive data analytics for future business improvement



Empower tomorrow

and ease the transition to zero emissions with IVI systems that help increase range, find and plan for charging.



📶 Data Collection in Real-time

Volta Trucks partners with HERE Technologies to deliver a tailored last-mile electric vehicle navigation system featuring what3words



Volta Trucks launch model Volta Zero, the disruptive full-electric commercial vehicle manufacturer and services provider will feature **integrated navigation services from HERE.**

It will make use the **EV Range Assistant**, a feature from HERE tailored for inner-city deliveries. It includes range prediction for trucks on route and allows for route planning including multiple delivery stops.

Search, routing, real-time traffic, and turn-by-turn voice guidance will be available both on- and offline.

**HERE is ready to support
Automotive players in their
transition.**

In summary...

Opportunities for collaboration



Enrich Your Portfolio

Use HERE Location data lakes, tool chains and algorithms to optimize your service portfolio



Improve Operations

Inform your data driven decision with location context



Grow Together

Co-create with HERE. Build joint value propositions and GTM



Accelerate

Monetization of Data

Connect to ecosystem market Place and maximize the value of your data lakes



Thank you

HERE Technologies

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