

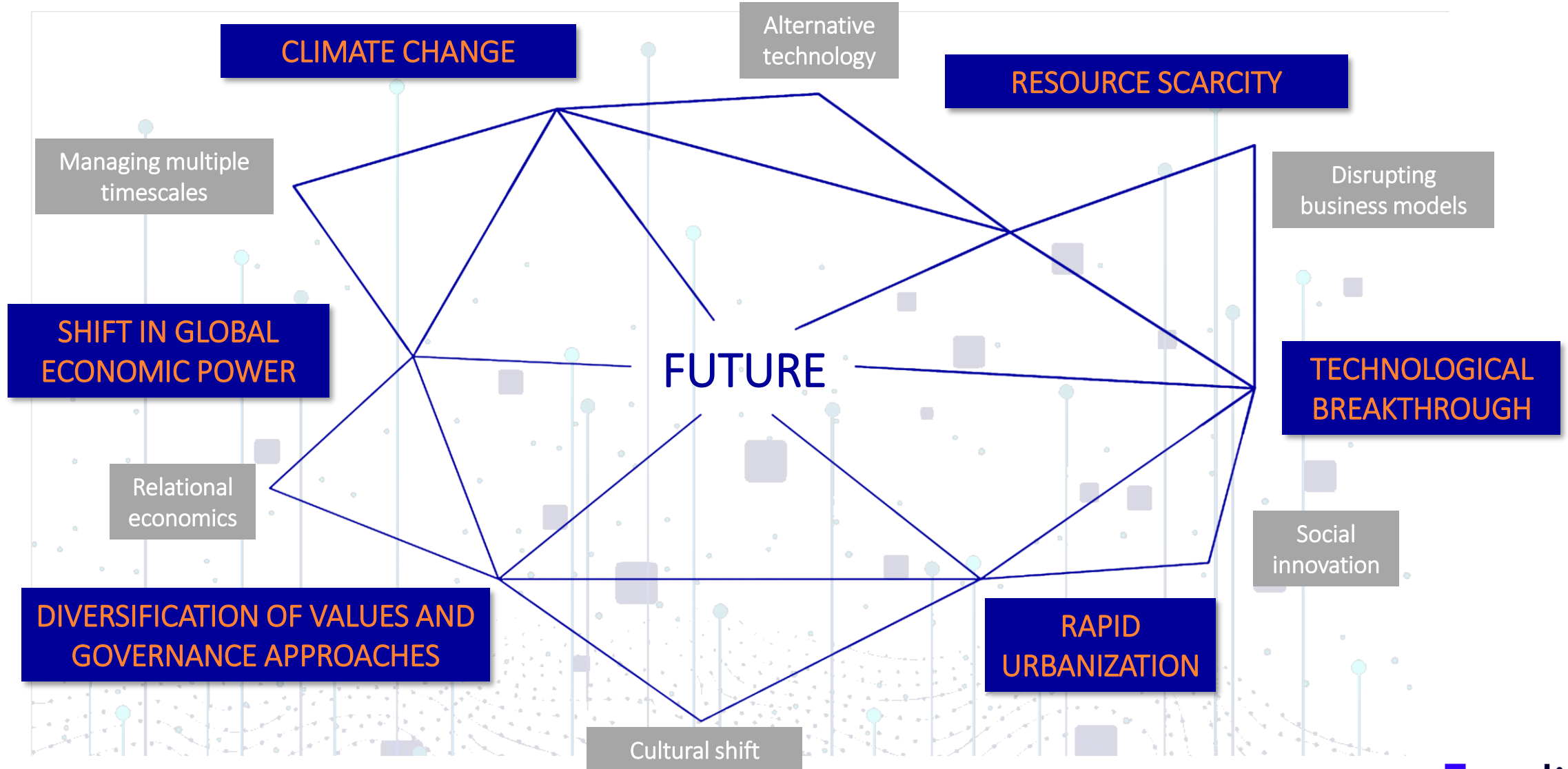


DISRUPTION OF MOBILITY – AN OPPORTUNITY FOR SUPPLY CHAIN



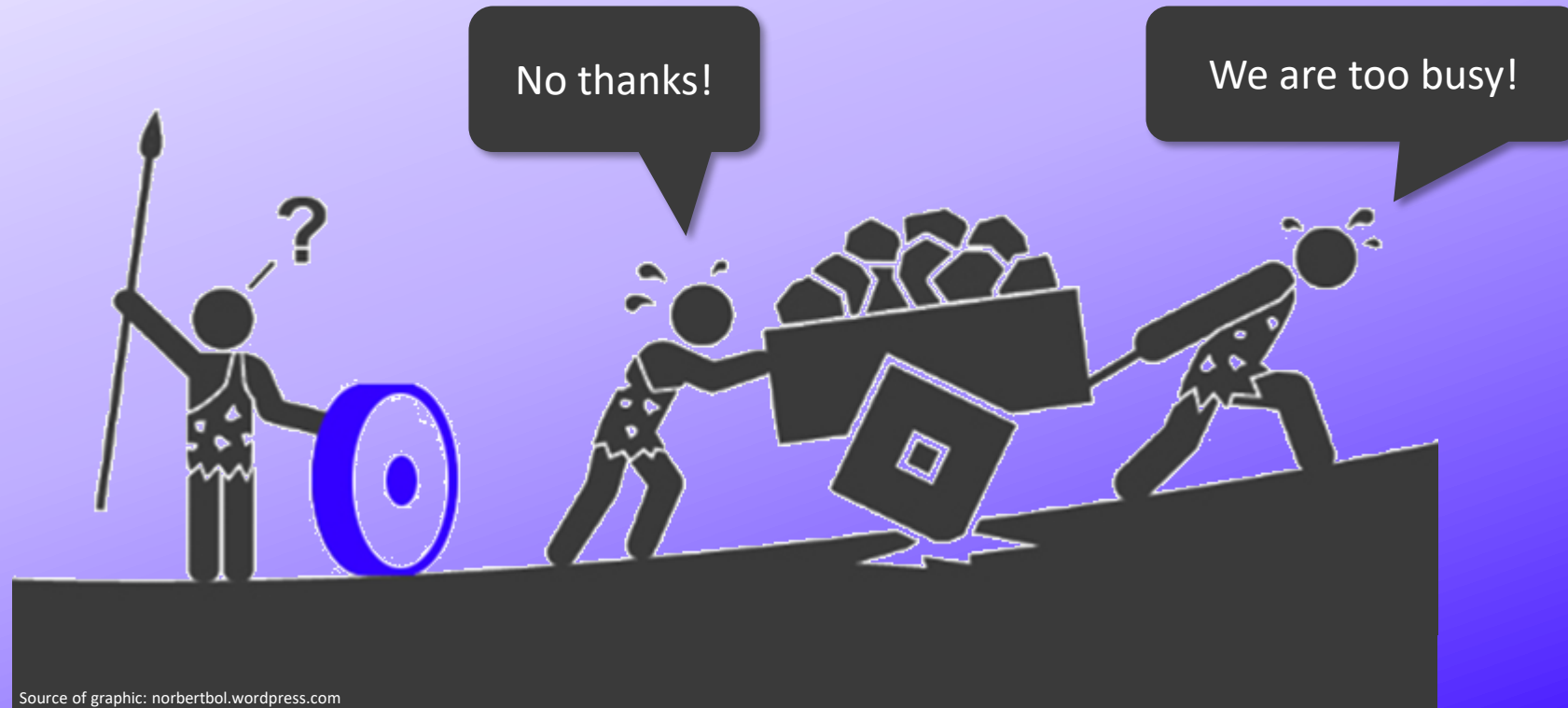
Disruption of mobility – An opportunity for supply chain

MEGATRENDS CHANGE THE ECONOMIC ORDER – THE PRESSURE TO TRANSFORM



Disruption of mobility – An opportunity for supply chain

ARE WE TOO BUSY TO IMPROVE?



We can not afford to stay the same!

Disruption of mobility – An opportunity for supply chain

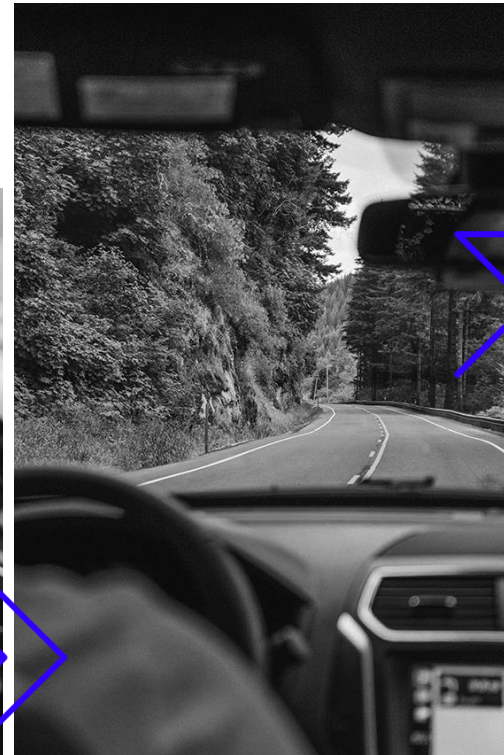
MEGATRENDS IMPACT ON NEW MOBILITY



Enhanced safety



Increased comfort



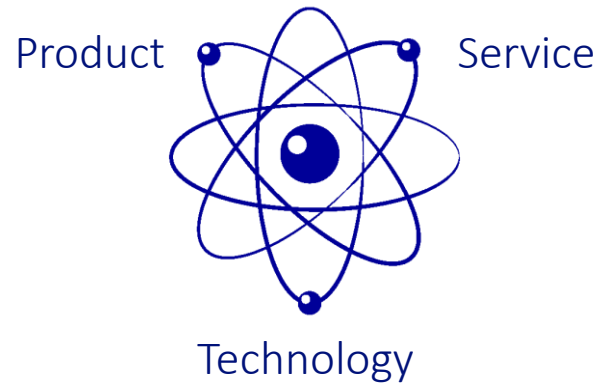
Eco-friendly living



Smart & resource-efficient infrastructure

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NEW BUSINESS MODELS COMBINING TECHNOLOGY, PRODUCT & SERVICE



EXAMPLE: NEW MOBILITY PLATFORM

Technology

- Internet of Things
- Vehicle-to-vehicle communication
- ...

Product

- Electric cars
- Electric scooters
-

Service

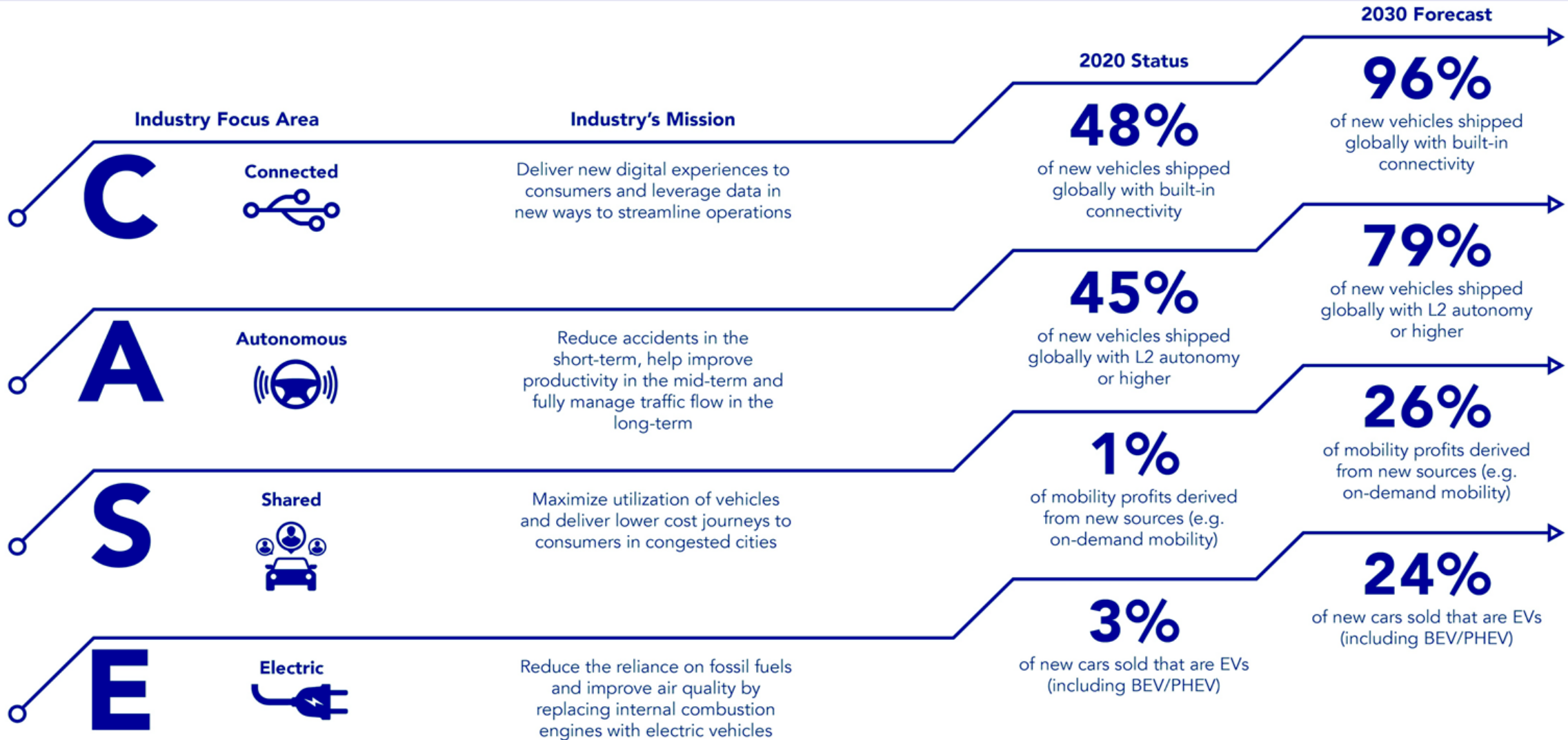
- Mobility as a Service
- Mobility on Demand
- ...



The appropriate combination is the key enabler for innovative solutions

Disruption of mobility – An opportunity for supply chain

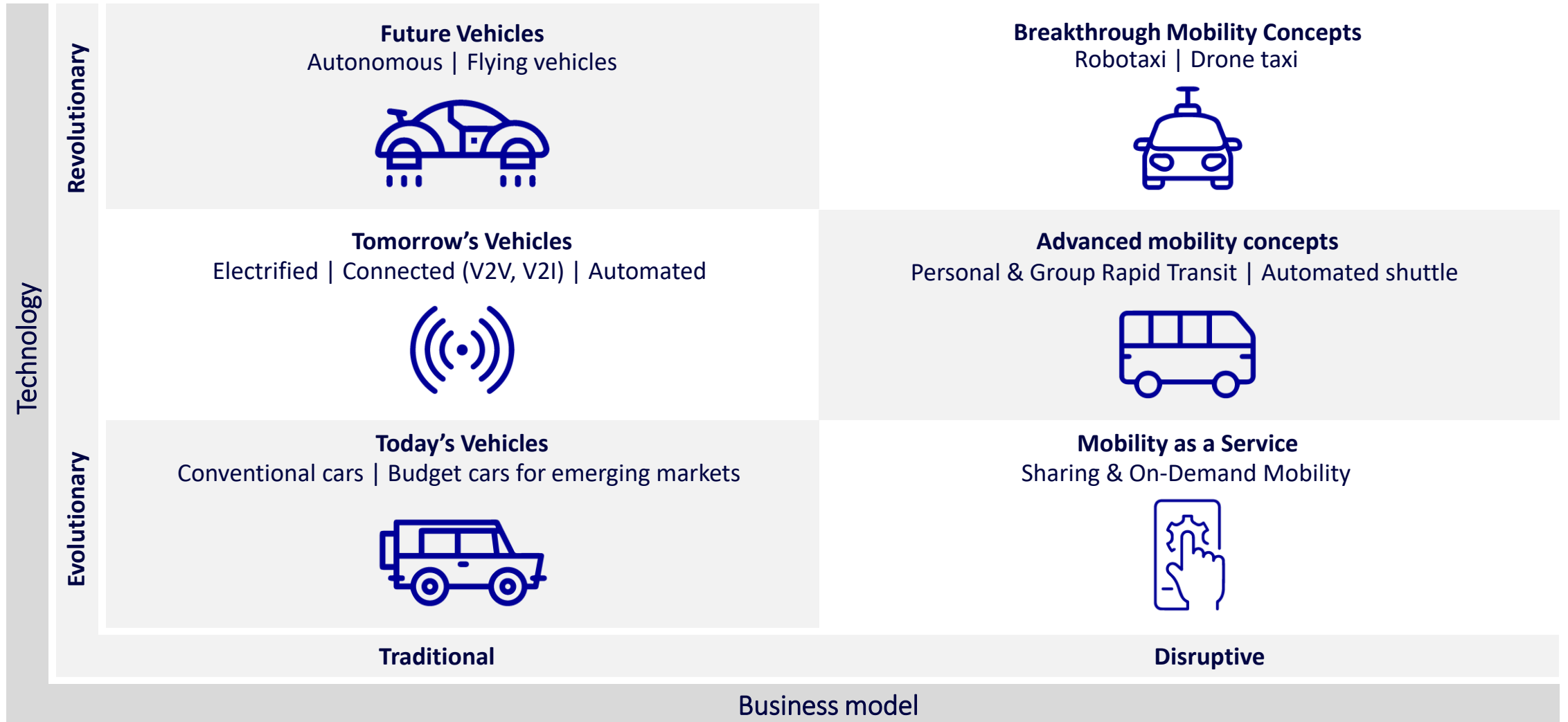
NEW MOBILITY IS C-A-S-E MOBILITY



Source: HARMAN International

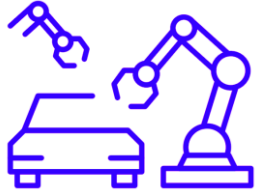
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NEW MOBILITY – THE ERA OF TRANSFORMATION & DISRUPTION



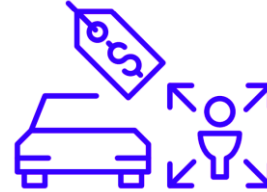
Disruption of mobility – An opportunity for supply chain

SUPPLY CHAIN – CHALLENGES AND OPPORTUNITIES IN THE EV MARKET



Automotive OEMs

- Long-established, sophisticated operations in vehicle production, supply chain, and supplier management
- Balance the simultaneous production of ICE-powered vehicles and EVs
- Developing EV battery and powertrain partners while continuing to foster relationships with current powertrain suppliers



Automotive Suppliers

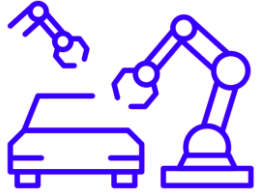
- Traditional ICE powertrain suppliers will have to evolve to support both current and future development and production needs across ICE- and EV-related products.
- Split their business in two, with one part serving the traditional ICE market and the other focusing on the rapidly emerging EV/CASE sector.
- Entry of companies that traditionally haven't been considered automotive suppliers—such as LG, Panasonic, and Samsung—that have found an opening in the industry via batteries and battery technology.
- Even traditional energy companies such as Shell and BP have entered the market as early leaders in building out the EV charging infrastructure that will be a key factor in vehicle adoption.



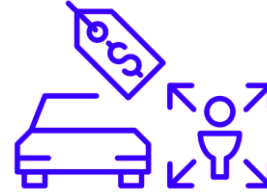
OEMs and **suppliers** are at a critical juncture. Key to their success will be learning how to quickly adjust their supply chains to create a business that can profitably capitalize on the growing preference for EVs over ICE-powered vehicles

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SUPPLY CHAIN – CHALLENGES AND OPPORTUNITIES IN THE EV MARKET



Automotive OEMs



Automotive Suppliers

Process & Structure

- Identify the new suppliers to partner with
- Make vs buy decisions
- Reimagine metrics for supplier management and risk
- Develop a localization strategy for battery pack assembly and other key components
- Environmental Factors (Sustainability)

- Secure supply for critical materials (e.g cobalt) especially for cell manufacturers
- The natural components of the lithium ion battery are only found in certain parts of the world.
- Lithium ion battery might not be the long-term solution for the electric vehicle market
- Environmental Factors (Sustainability)

Technology

- Create a comprehensive vision of their procurement and supply chain technology stack
- Building a supply chain technology ecosystem that marries upstream and downstream activities
- Consider how blockchain can improve supplier Tier visibility

- Consider how blockchain can improve supplier Tier visibility
- Tier 1, 2, 3 and beyond suppliers can introduce blockchain concepts into new EV supply chains, ensuring transparency of supplier quality, cost and delivery performance.

Coming together is the **beginning**.
Keeping together is **progress**.
Working together is **success**.
Henry Ford

So let's begin!

THANK YOU!