

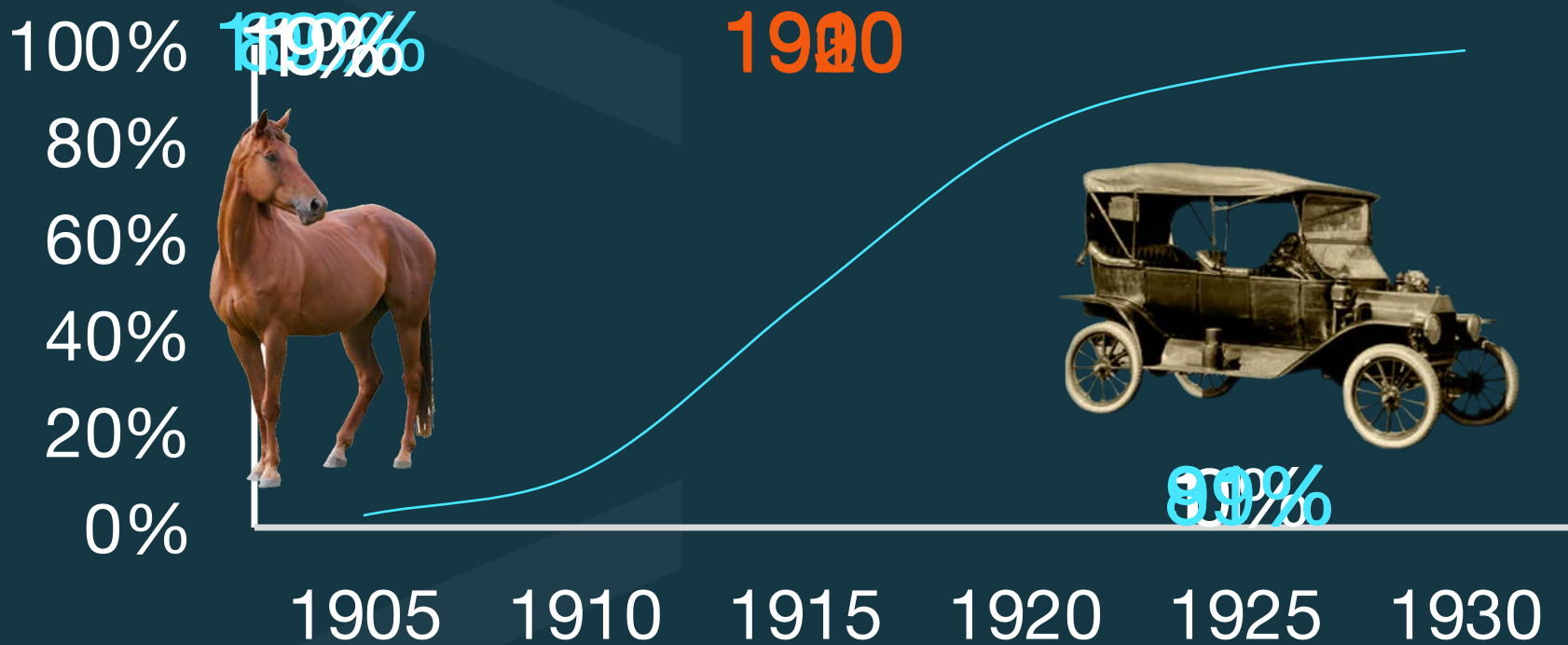
Rethinking the Future:

The Future of Transport

Disruption, Implications, Choices

Barclays - New Frontiers 2018
James Arbib | 29 November 2018

The shape of disruption: S-curve adoption

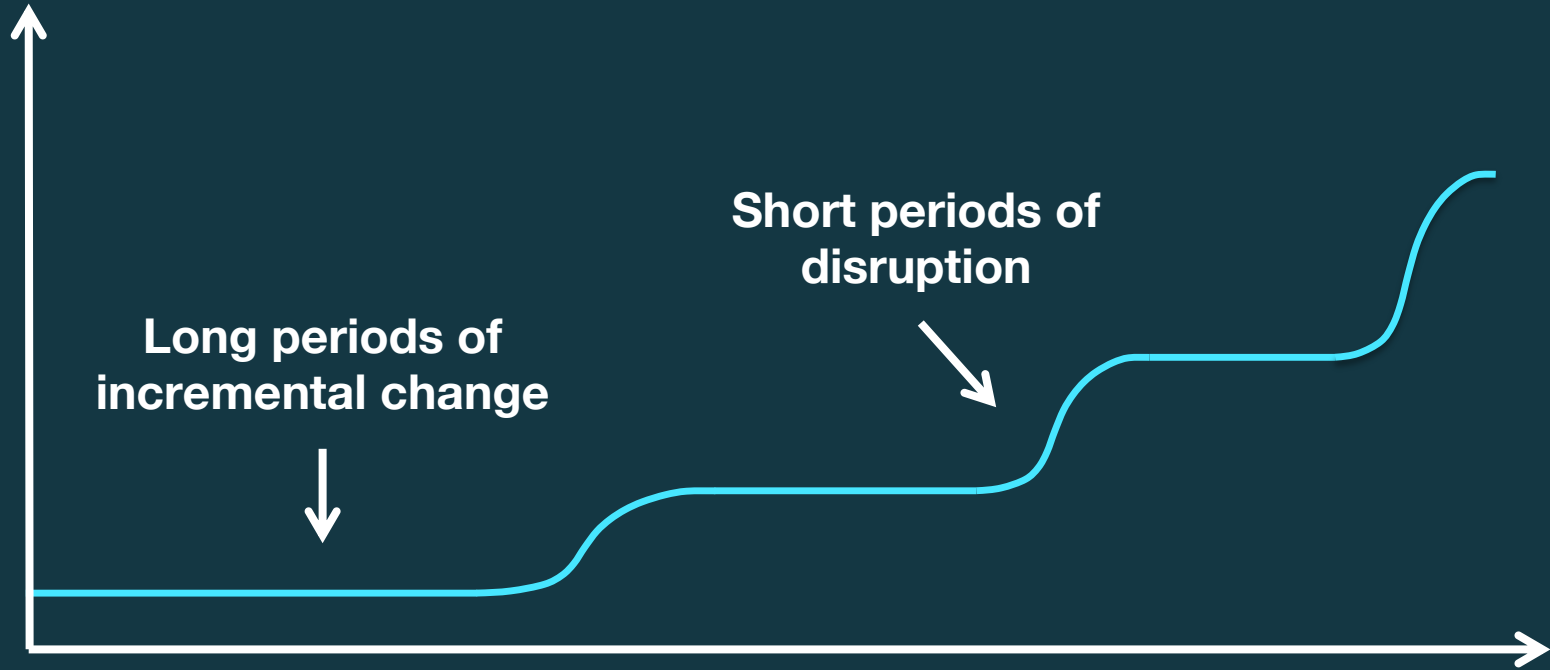


Seemingly insurmountable barriers

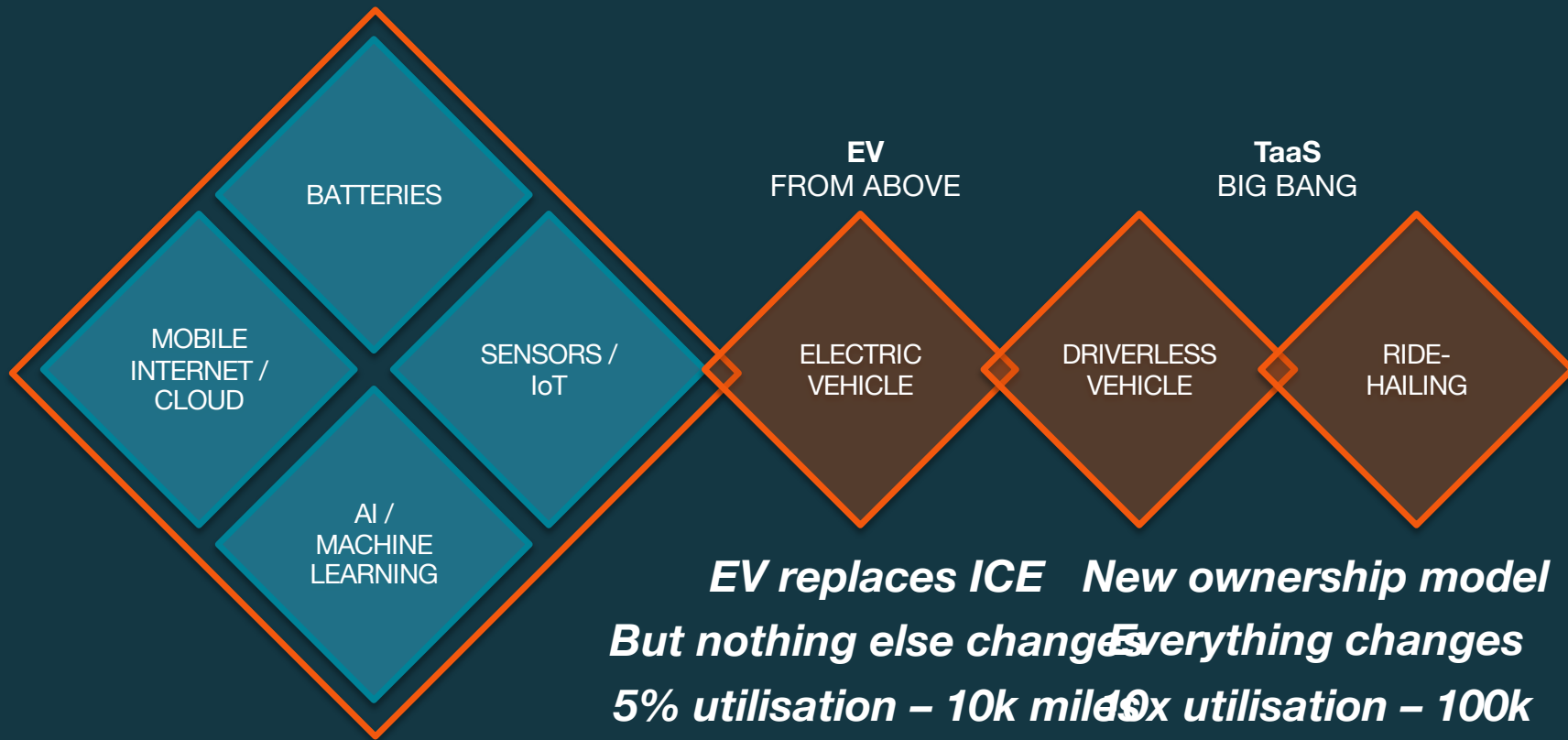
- > No supply chains
- > No manufacturing
- > No petrol stations or oil industry
- > Almost no paved roads
- > No car mechanics
- > No one knows how to drive!



History of progress

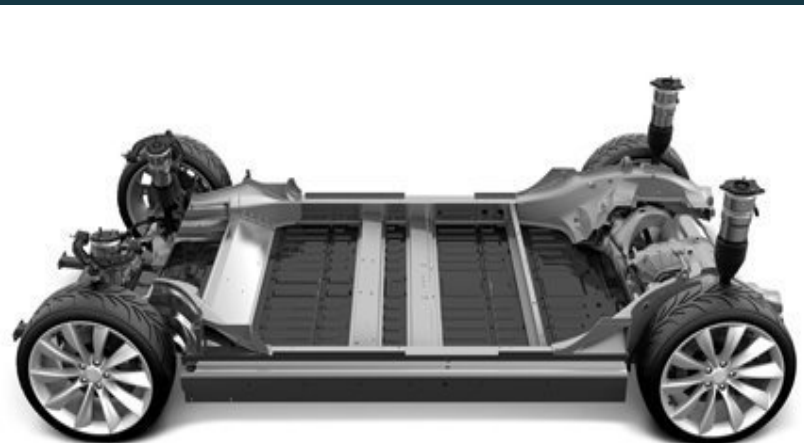


Transportation disruption



EV replaces ICE New ownership model
But nothing else changes Everything changes
5% utilisation – 10k miles p.a. 10x utilisation – 100k miles p.a.

Why is TaaS so cheap?



18 moving parts
Much less to go wrong...



100s-1000s moving parts

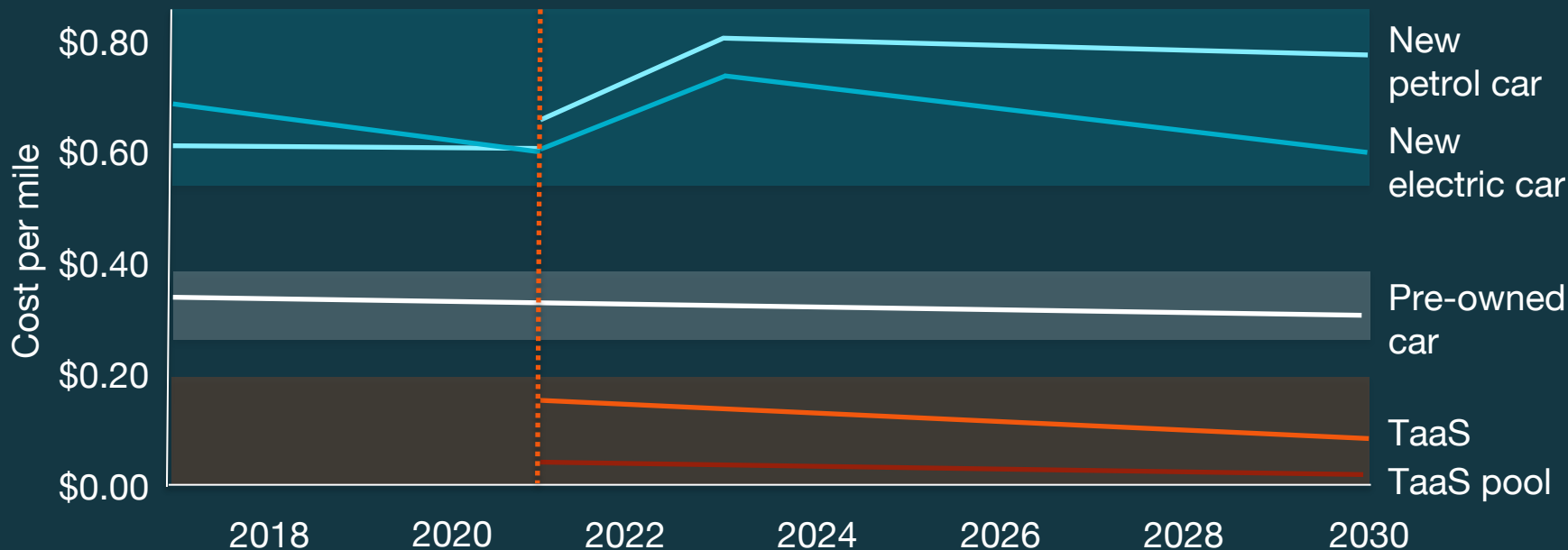
>5-7x increase
VEHICLE LIFE TIME

>90% reduction
MAINTENANCE

>70% reduction
FUEL

>90% reduction
INSURANCE

TaaS 4-10x cheaper than independently owned vehicles

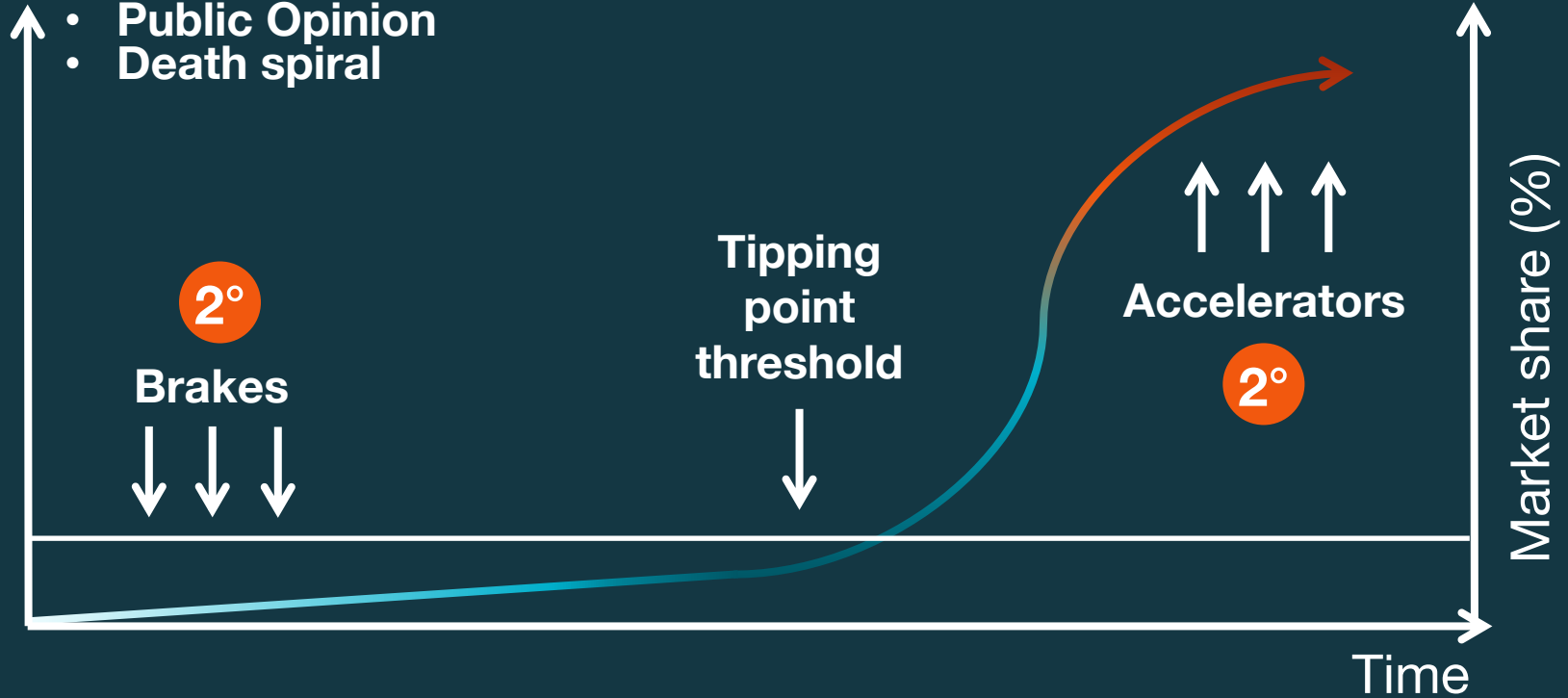


Does not include time value of driving or other revenue sources.

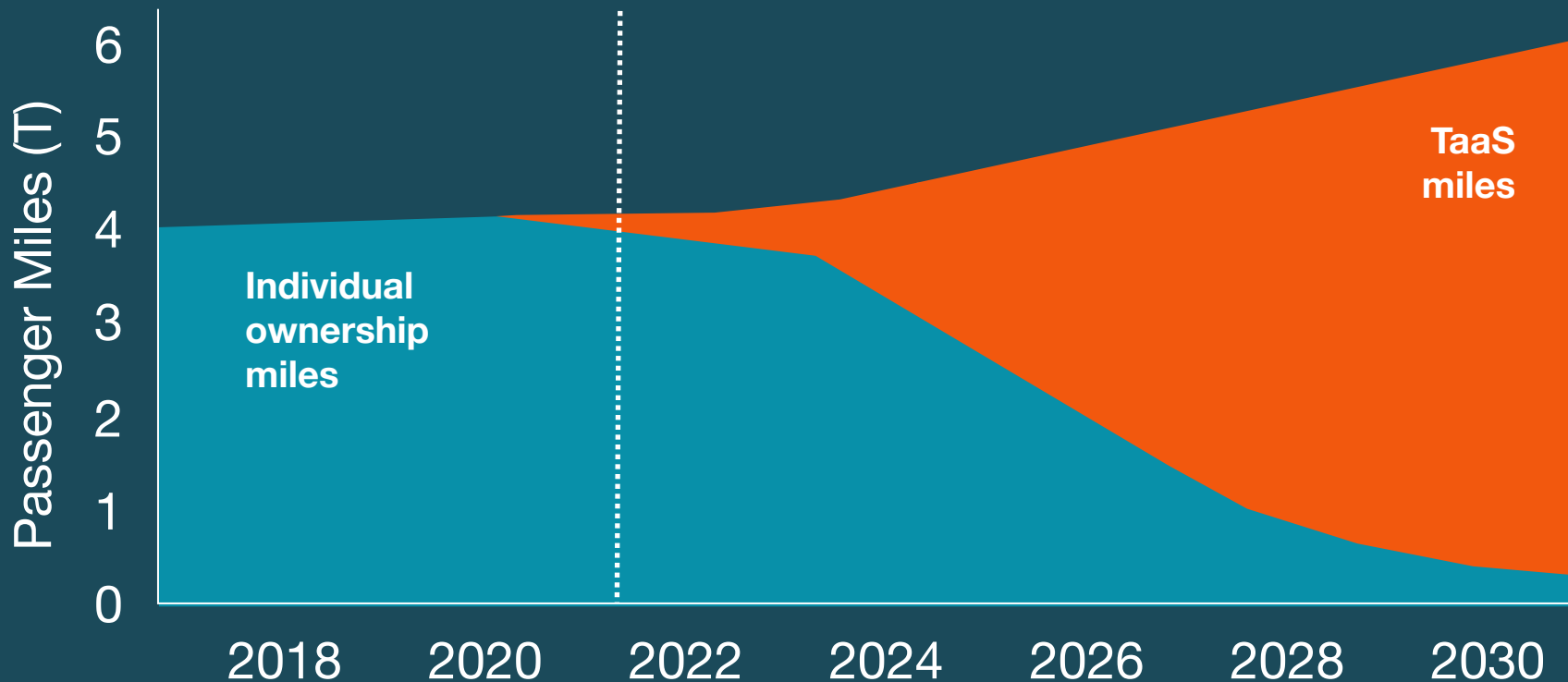
Systems Effects

Examples:

- Public Opinion
- Death spiral



The End of the ICE Age

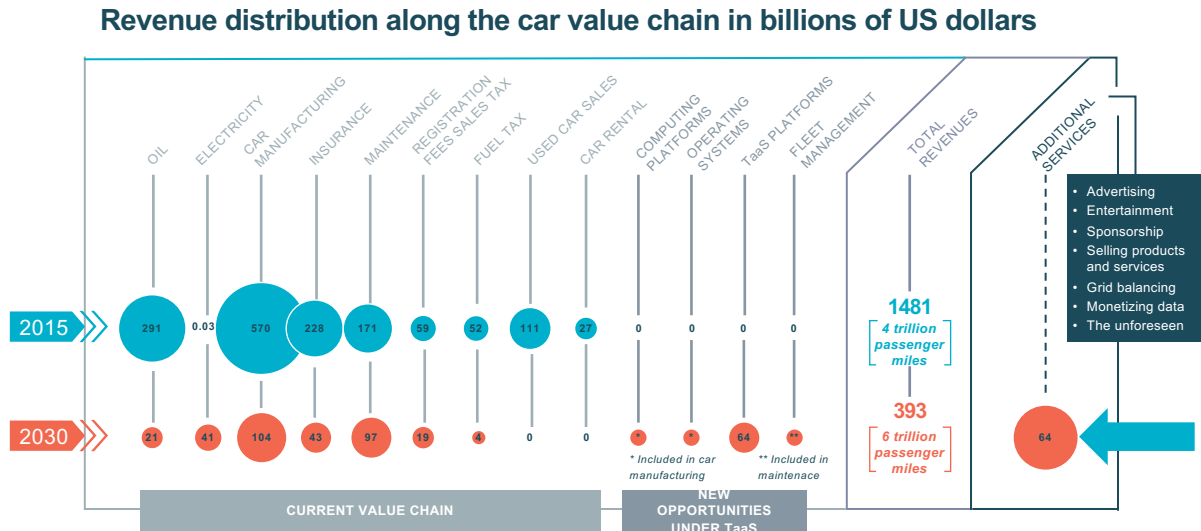


1st Order Implications

The Key to success?

- Advertising
- Data monetization
- Entertainment
- Products / Services
- Grid services
- Entirely new businesses

“Google-ization of transport”



Implications ripple across system

ECONOMIC

- \$6k per annum increase in disposable income = \$1 trillion by 2030
- 150 billion hours freed for productive use = \$1+ trillion
- Reduction in infrastructure spending
- Land freed up in cities

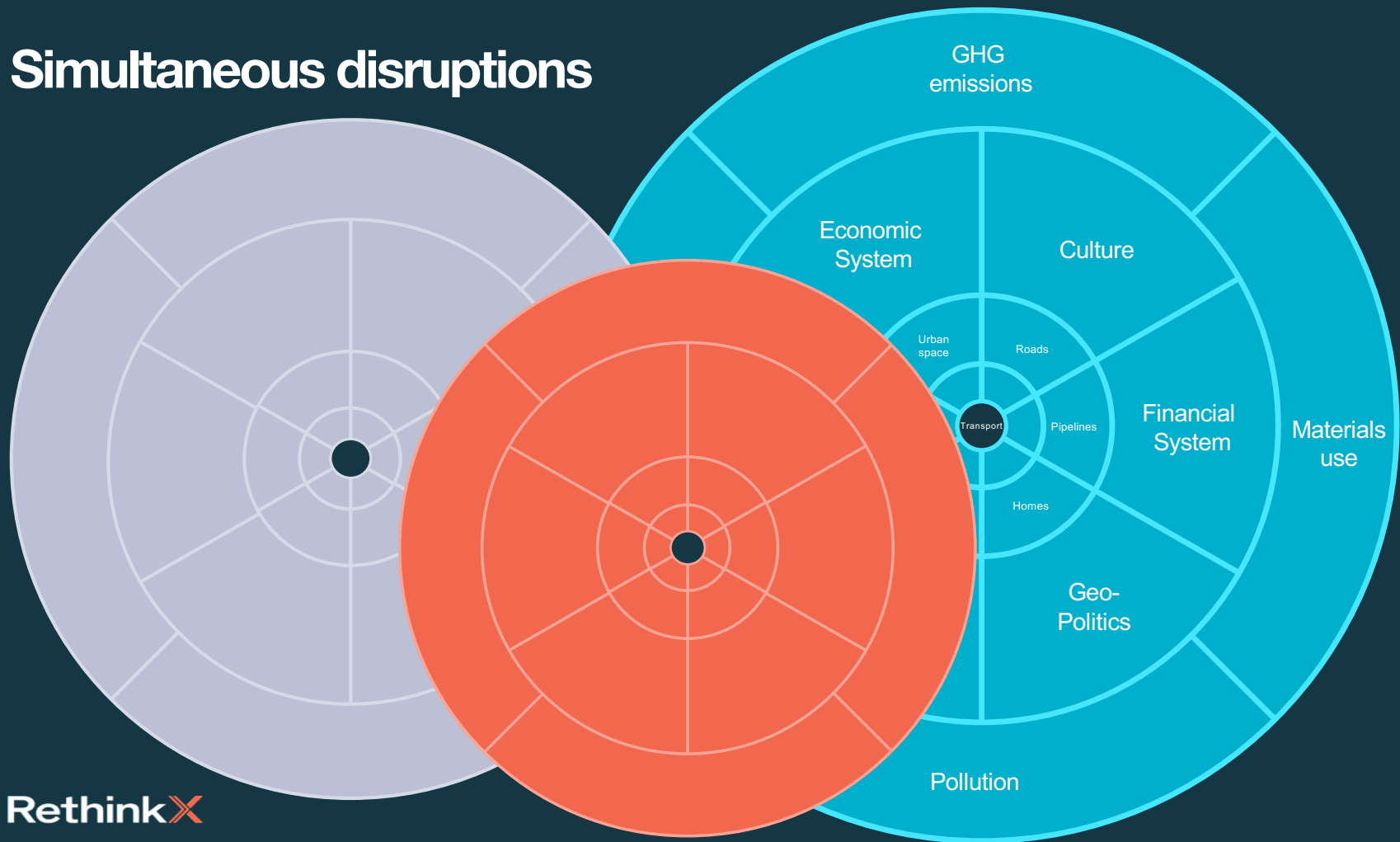
SOCIAL/ ENVIRONMENTAL

- Jobs lost/ gained
- Access to transport
- Clean air
- Less accidents
- CO2 emissions

Global Race to the top



Simultaneous disruptions



Rethink Everything!!

James Arbib

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