




# Autonomous driving: a regional affair

3 December 2018



Europeans spend a gargantuan \$1.2T<sup>¶</sup> every year on personal transport - 13% of household consumption

\$916 billion on personal cars & operating them

75%~ of Europeans live in cities

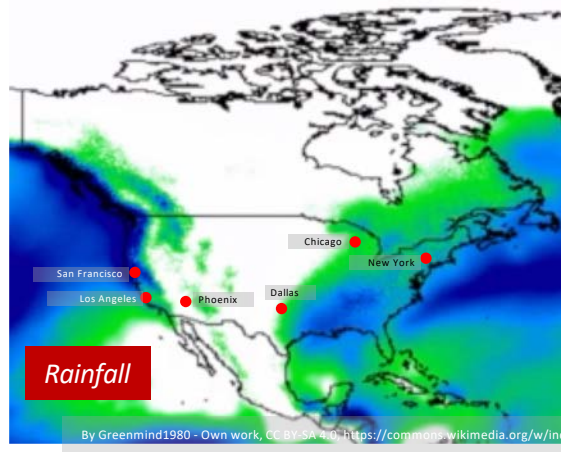
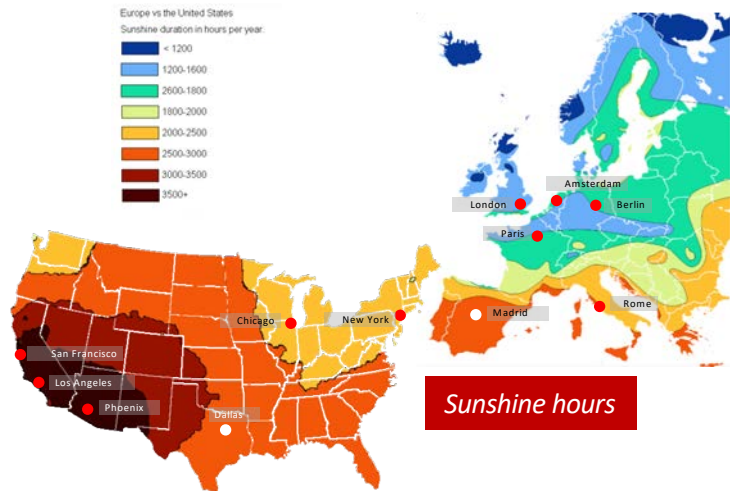


Develop and train safe autonomous driving for European cities

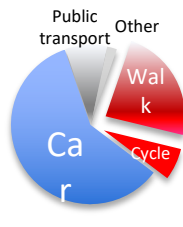
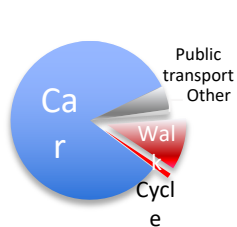
Operate a fleet of AVs to deliver demand-responsive mobility services to consumers

# US and Europe are very different

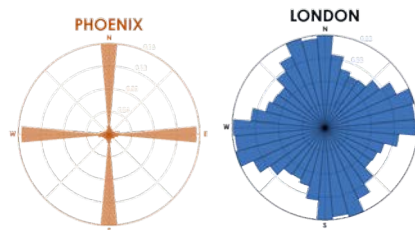
JANUARY



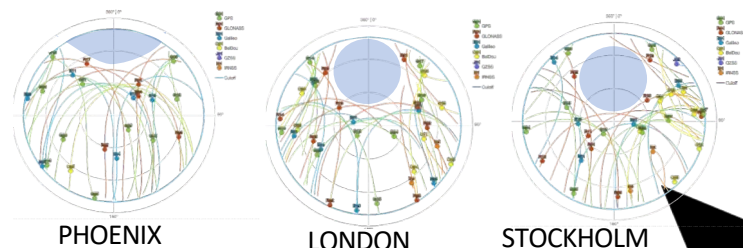
**Vulnerable road users**



**Road topologies**

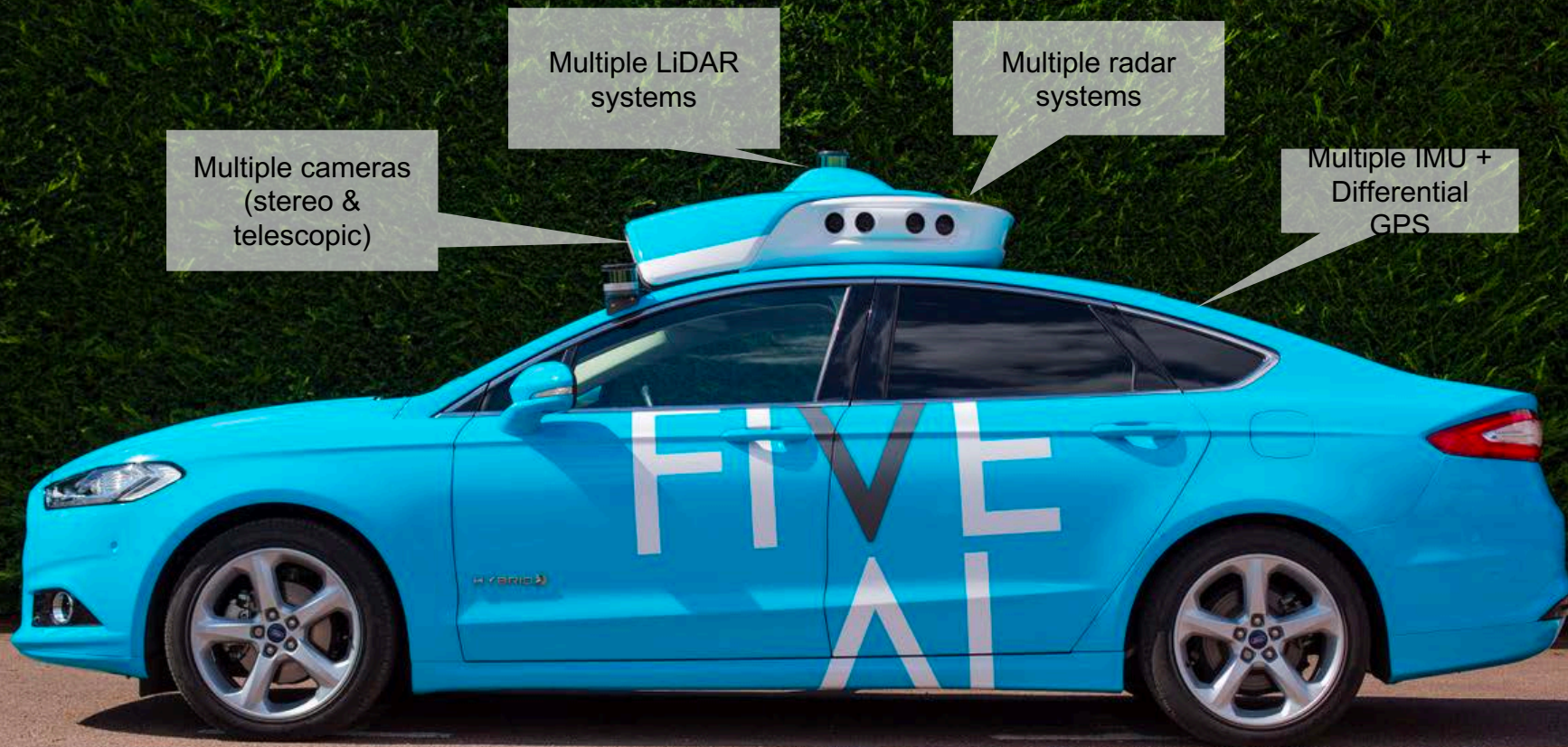


**GNSS skyplots**



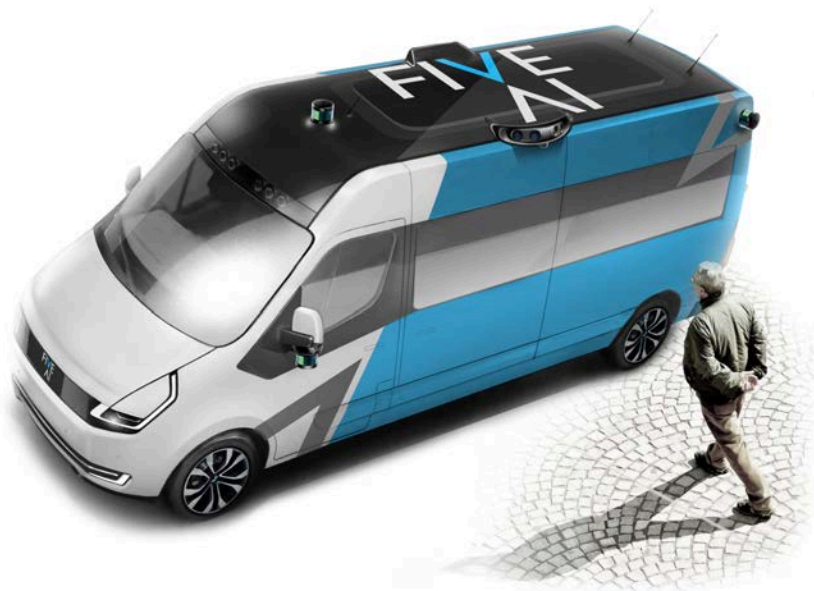


# A year ago, this was a concept only



Today you see it working on UK public roads

# In just over a year's time, passenger trials on London streets



Only AV MaaS trial supported by Transport for London (TfL)

Supported by \$15M UK government grant (\$11M for Five)

Trial full-stack service in Q1 2020 with c.30 vehicles

Commercial service start mid-2022 to early 2023

STREETWISE project





A satellite view of Europe at night, showing the continent's outline and internal city lights against the dark background of the Earth and space. The text is overlaid on the left side of the image.

Europe - a huge and distinct market  
That's way under-invested  
Ambitious leadership team  
Wide political support  
Super-cool project