





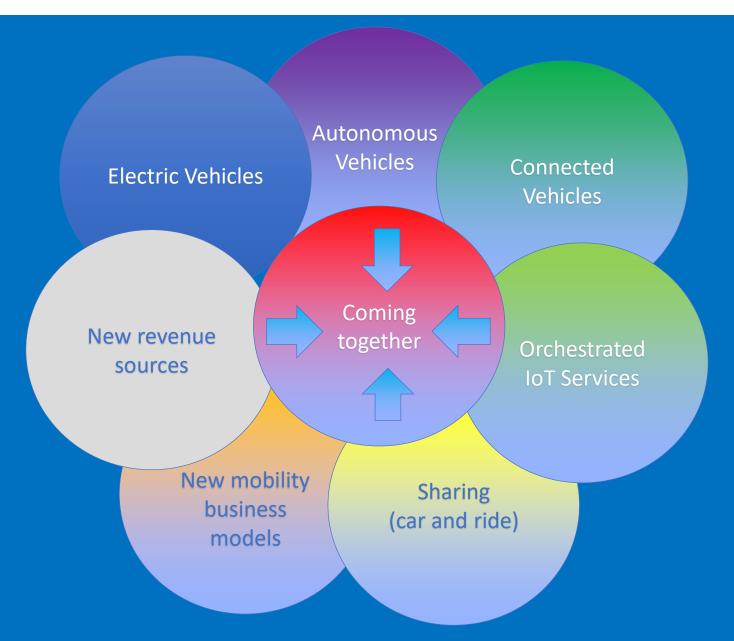






Convergence





Timeframes for highly automated pilots



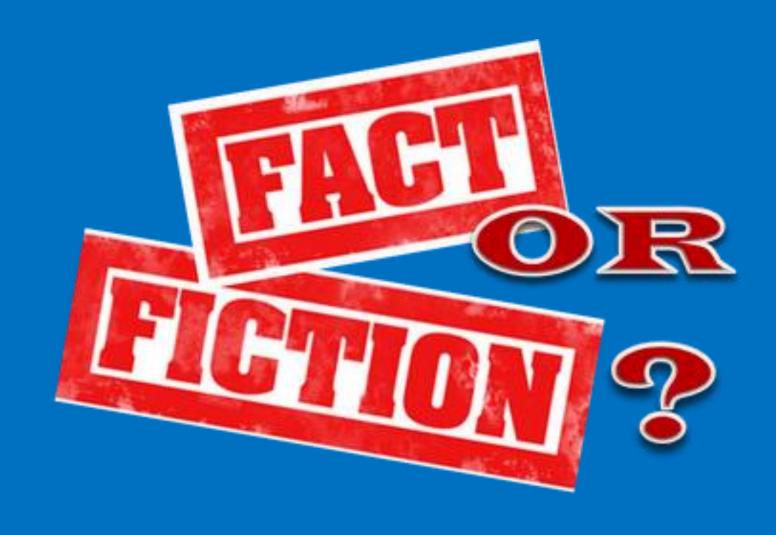
Manufacturer	Highly automated launch date (Lvl4)
GM	2020
Tesla	2020
Toyota	2020
Tesla	2020
Daimler	2020-2024
VW	2021
BMW	2021
Ford	2021
Groupe PSA	2021
Hyundai-Kia	2021
SAIC	2021-25
Renault-Nissan-Mitsubishi Alliance	2022
Honda	2025

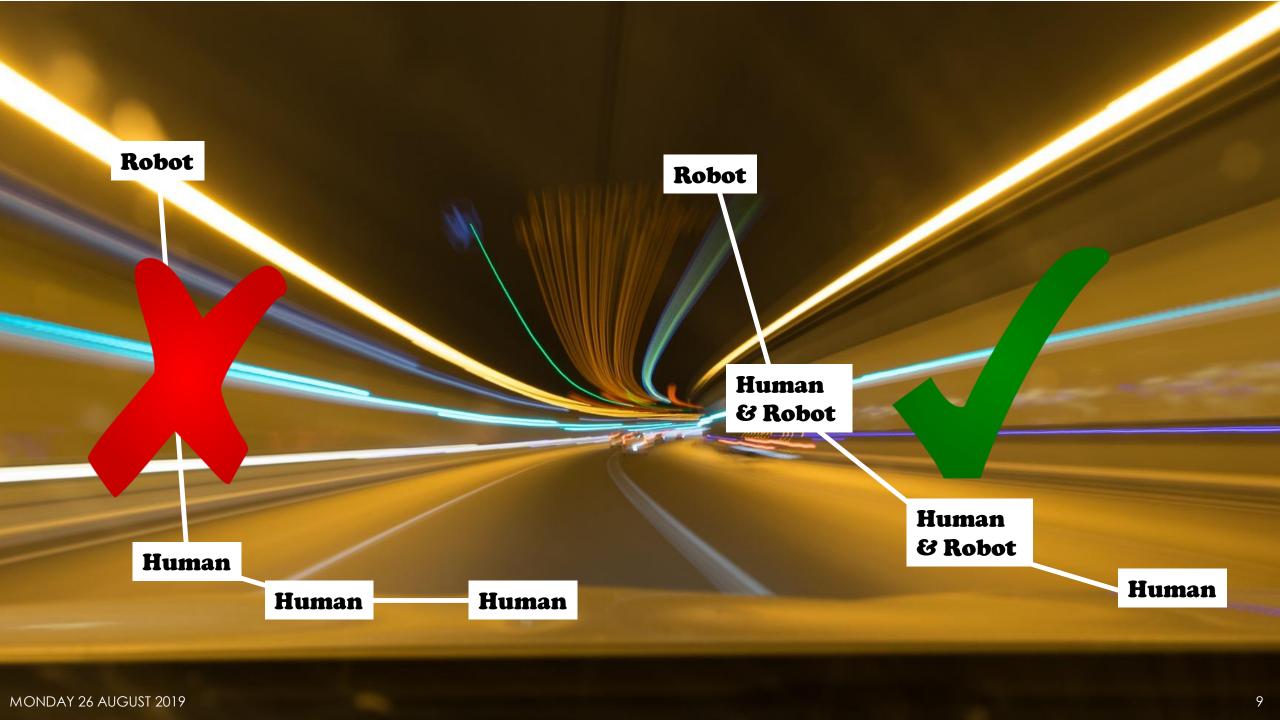
Source: Adapted from Bloomberg New Energy Finance (July 2019)

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What can I believe?







First to market...



The use cases that are simplest:

- Conditional automation
 - Highway pilot
 - Automated valet park / self-park
- Highly controlled environments (HD geofenced domains not on public roads)
 - Mining haul trucks, water trucks, cranes, etc.
 - Agricultural equipment incl. harvesters, sprayers, tree-fellers, etc.
 - Road construction equipment incl. loaders, spreaders, rollers, etc.
 - Automated industrial and warehouse distribution
- Task specific conditionally controlled
 - First mile last mile pods, shuttles and special-purpose buses in low speed well controlled environments
 - Automated freight within dedicated routes and spaces (e.g. port access roads and intermodal facilities)
 - Automated land-based drone deliveries in low speed CBD environments
 - Point to point ride share fleet services in low speed geofenced precincts

Automated Trucking







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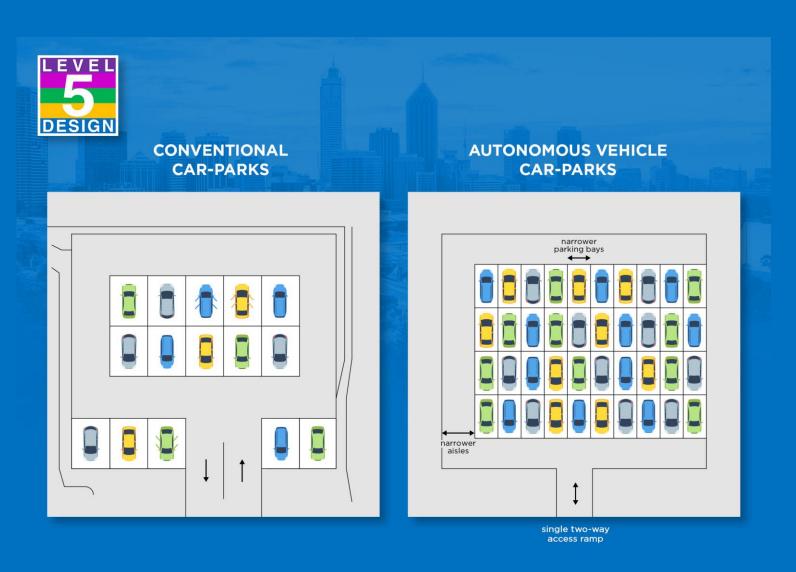




Automated self-parking



- Parking garages
 specifically designed
 for self-parking cars can
 take up 60% less space
 than traditional lots
- Savings on footprint, ceiling heights, finishes, stairs, elevators, lighting, security, boomgates



Linking complimentary technologies









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Getting prepared



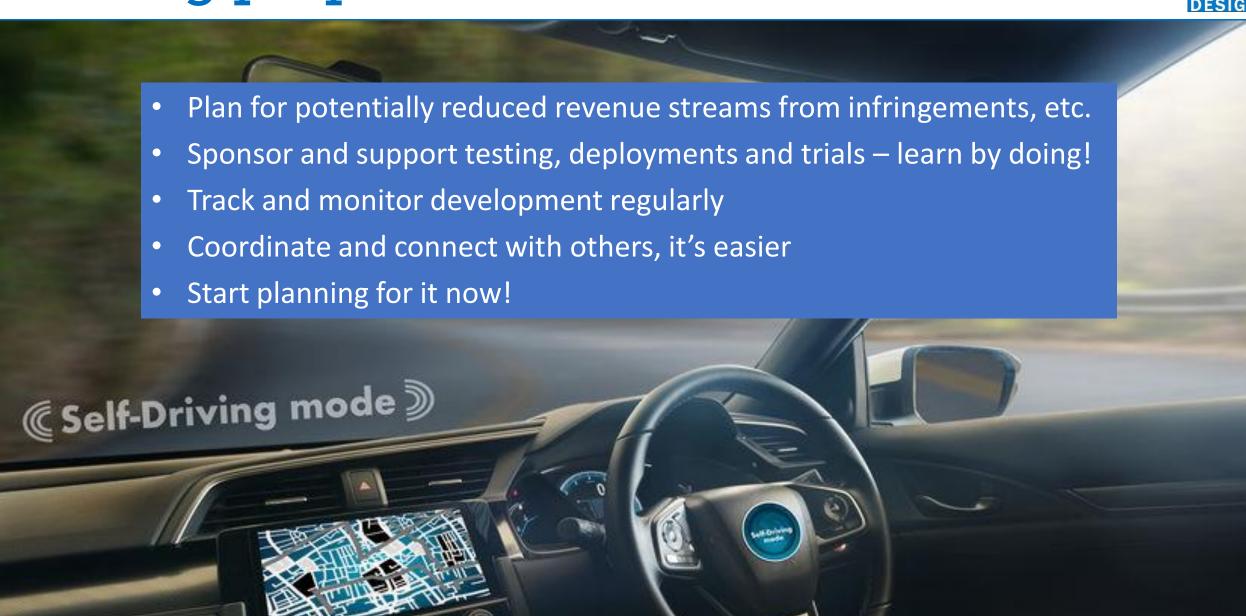


- Establish active policies
 - Proactive electric vehicle fleet procurement policy
 - Consider incentives scheme
 - Car sharing policy
 - Alter parking policies to reduce the supply of parking
- Change the approach to DA approvals
 - More drop off and pick up space in new developments
 - Less dedicated parking on site
 - Design for re-purposing



Getting prepared





Take that step...





Thank you



LEVEL 5 DESIGN

Inspiring Innovation in Parking and Transport

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