



# “How electric mobility is changing our daily lives”

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*Oslo, September 19th*

# Our daily electric mobility...



On a good day



On a bad day...

# Our daily electric mobility...



On a good day



On a bad day...

# Our daily electric mobility...



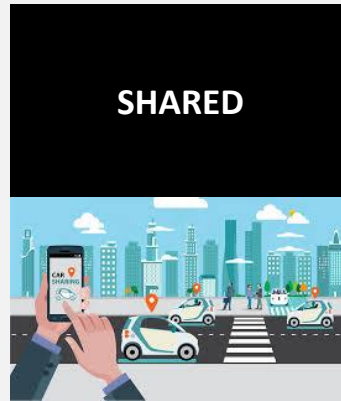
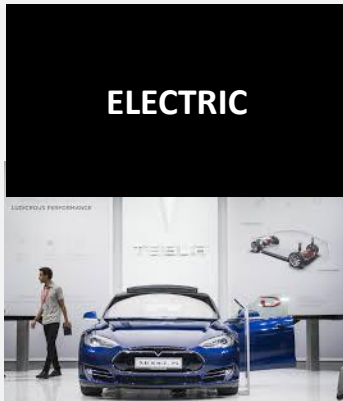
On a good day



On a bad day...

# WHAT IS NEXT?

THE FUTURE OF MOBILITY SEEN FROM NORWAY



# ALD AUTOMOTIVE

## AT A GLANCE / KEY FIGURES



# 1st

Worldwide coverage



6,500 +  
people

100,000 +  
customers

Part of



> €8,9 billion\*\*

+ 8,5 % (vs.2017)  
Revenues in 2018

S&P Global Ratings **BBB+**

with stable outlook "long term issuer credit rating"

Fitch Ratings **A-**

with stable outlook "issuer default rating"



Managing over

1,66 M\*

vehicles (+ 10,1% vs end 2017)

# 1st

European Leasing company



Direct presence in **43** countries



1,5  
Million  
TYRES



3  
Million  
DAYS OF SHORT TERM  
RENTAL



450  
Million m3  
LITRES OF FUEL

USED CAR SALES\*\* **283,000 units**

ALD carmarket



~20%

TO INDIVIDUALS

>60 %

ELECTRONIC SALES

\* At end of December 2018

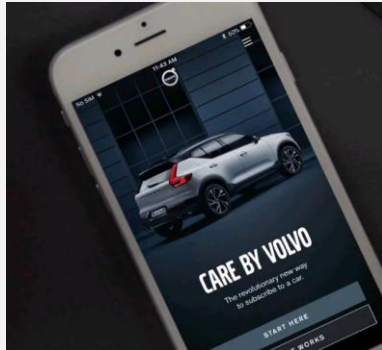
\*\* Revenues from external customers, 2018

# WHAT IS DRIVING THE CHANGE?

THE 4 MAIN DRIVERS IN NORWAY



## OEMs / importers



The large importers are all in the “new mobility game”

## The green shift



Stortinget and municipalities are more than ever in control

## Consumers



Consumers are ready for sharing their mobility

## Technology



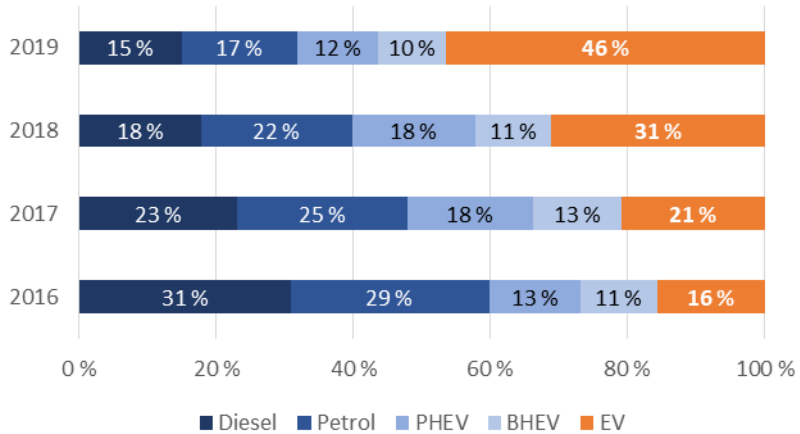
Technology will be ready before the legislation

# THE FUTURE IS ELECTRIC

NORWAY IS THE “EV LABORATORY” OF THE WORLD



New registrations passenger cars 07/19



## A FEW KNOWN KEY FACTS

- This is the results of the highest incentives in the world (+/- 10.000€), direct and indirect
- Norway is the only country in the world where the TCO of an EV is less than the one of an ICE car (80/100)
- The result is the creation of the first EV ecosystem in the world

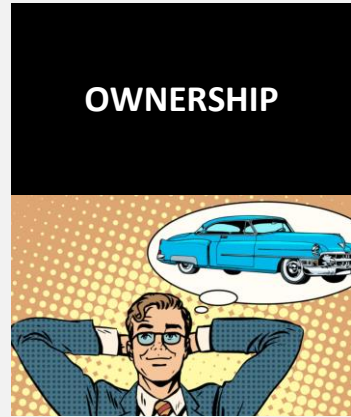
## A FEW LESS KNOWN KEY FACTS...

- This creates an in depth reshuffling of the car industry in Norway
- Norway is today hosting/attracting new tech EV related start up and creating «green» competences
- The tax and tech uncertainty also drives people/companies to «lease» rather than «buy» cars



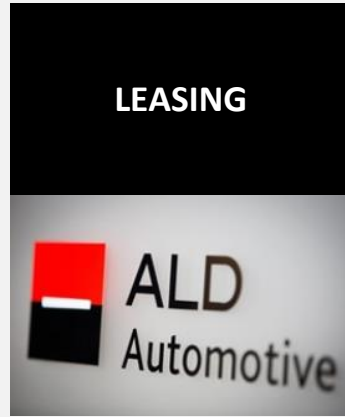
# THE FUTURE IS SHARED

CARS AREN'T AN "ASSET" ANYMORE, THEY ARE A "SERVICE"



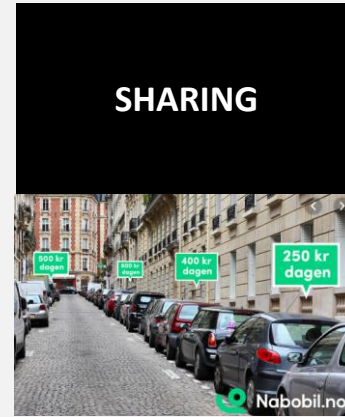
OWNERSHIP

Cars as an asset and a status symbol



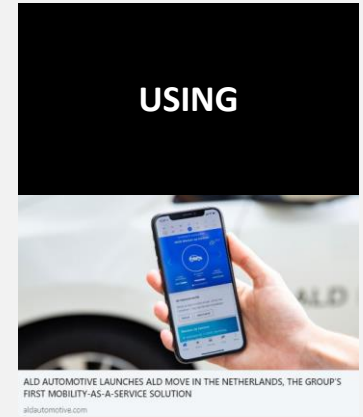
LEASING

Also a way to mitigate your residual value risk?



SHARING

Peer sharing, city car sharing, etc.



USING

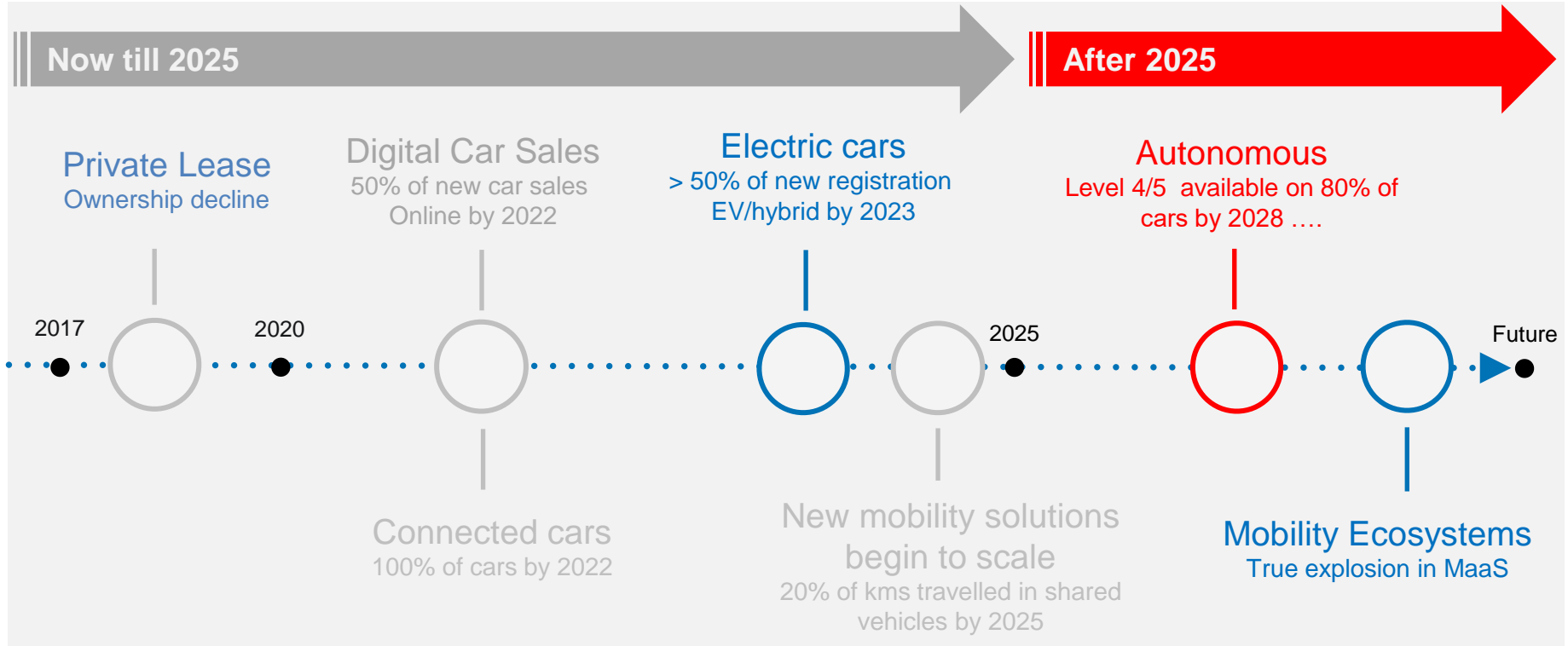
Subscription, Maas, et.

TODAY

TOMORROW

# THE FUTURE IS AUTONOMOUS

THERE IS A "BEFORE" AND "AFTER"



# THE FUTURE IS AUTONOMOUS

GOOD OR SCARY?...



## THE GOOD

- Changing our city landscape: less cars parked, more cars driving = more space, less pollution, less time spent in traffic
- Changing our relationship to mobility: available and immediate, no matter how you are/feel
- Solving some societal issues: the young and the elderly

## THE SCARY

- Security? are we ready?
- Responsibility in case of accident? ethical issues and insurance issues?
- Infrastructure: roads, all or nothing?
- How do we make it happen: finance companies, other players etc.

# AS A CONCLUSION

THE CAKE IS BIG. MOBILITY  
MARKET IS EVALUATED AT  
620BUSD IN 2025 (25% CAGR)



THE BATTLE WILL BE FIERCE!  
AND THERE WILL BE MANY  
NEW COMERS

The Google logo, consisting of the word 'Google' in its characteristic multi-colored font (blue, red, yellow, blue, green, red).

ITS A WORLD OF CO-  
BECAUSE OF THE SIZE OF  
THE INVESTMENTS, NO ONE  
CAN PLAY ALONE



# SHARING MY PERSONAL VISION OF THE FUTURE

Mobility will be a service and *time* will be the main choice criteria



The cars of today are the horses of tomorrow: a *leisure* and not a daily need



The choice of your future car will be based on *experience*, not on brand

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