



Ricardo BACELLAR
KPMG in Brazil
Head of Automotive

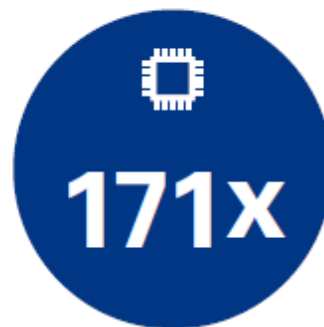
Nov / 2017

Congresso **2017**
SAE BRASIL

What will the future
mobility ecosystem
look like?

Auto CEOs: Disruption meets innovation

Computing power



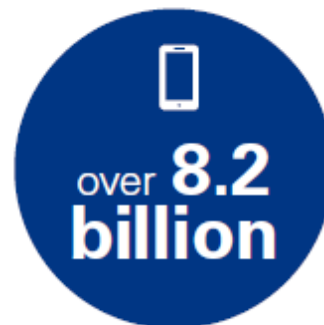
Growth in number of transistors in commercially available processors 2000¹ – 2016²

Network bandwidth



UK average broadband speed 3.6Mbit/s in Nov 2008³ compared to 36.2Mbit/s in Nov 2016⁴

Mobile penetration



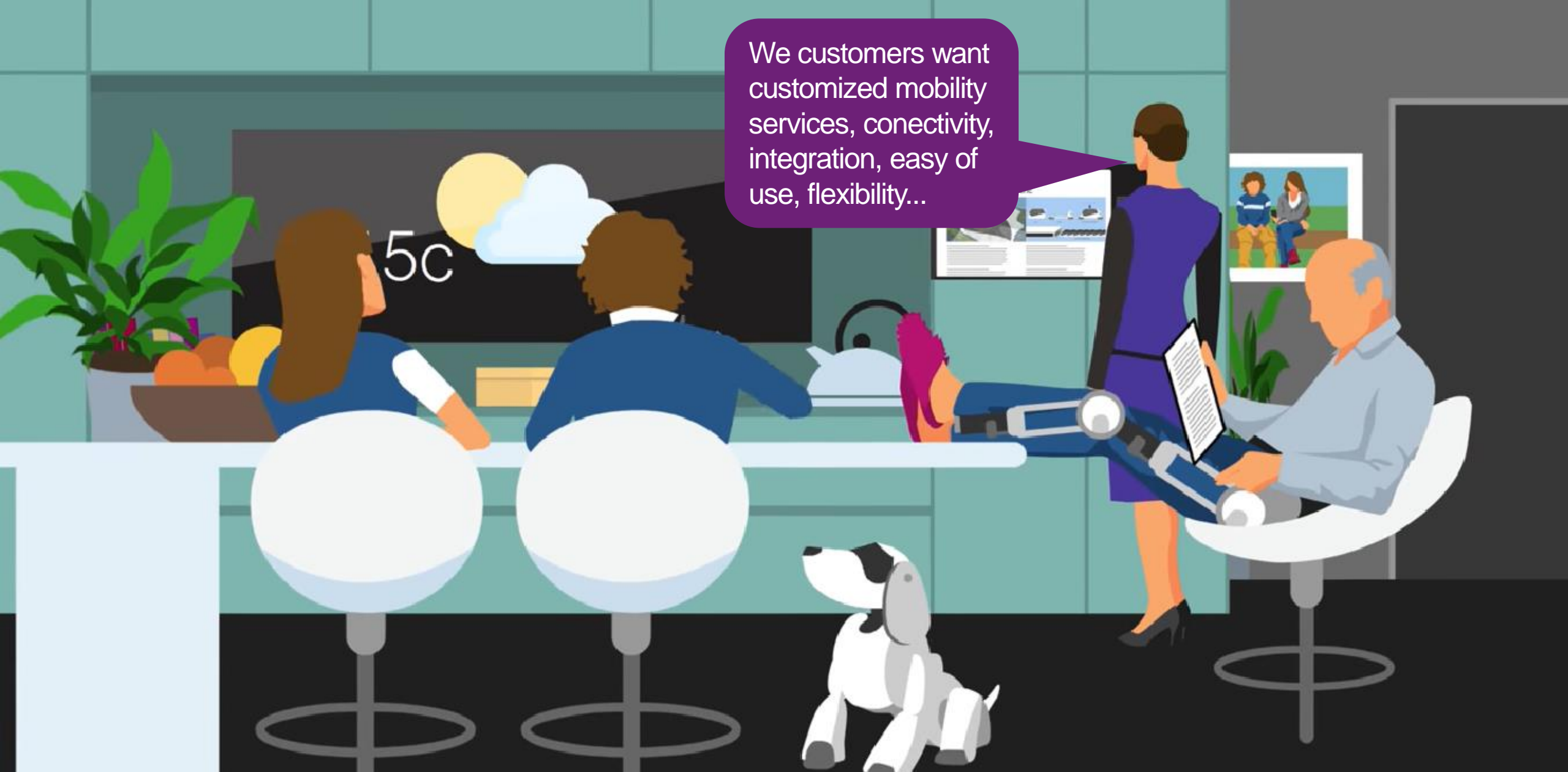
Mobile connections⁵, and over 5 billion unique mobile subscribers⁶

Connected devices



Number of connected devices as compared to humans by 2020⁷

What will the future mobility ecosystem look like?



We customers want customized mobility services, conectivity, integration, easy of use, flexibility...

5c

What will the future mobility ecosystem look like?

Renew subscription Select your mobility package

Education

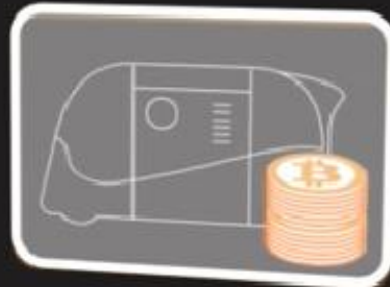
Leisure

Business

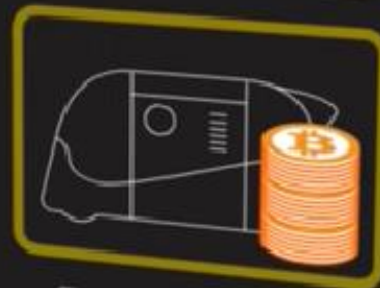
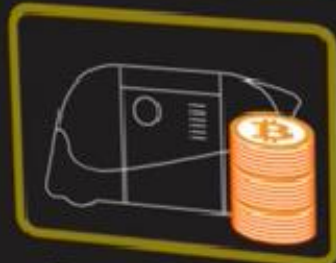
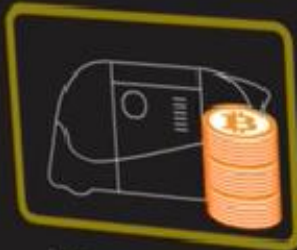
Standard



Premium



Gold



Powered by

Mi-Learn

Powered by

iSports

Powered by

No problem paying, but for what fit our needs only!

Cost



Powered by

PayWall

What will the future mobility ecosystem look like?

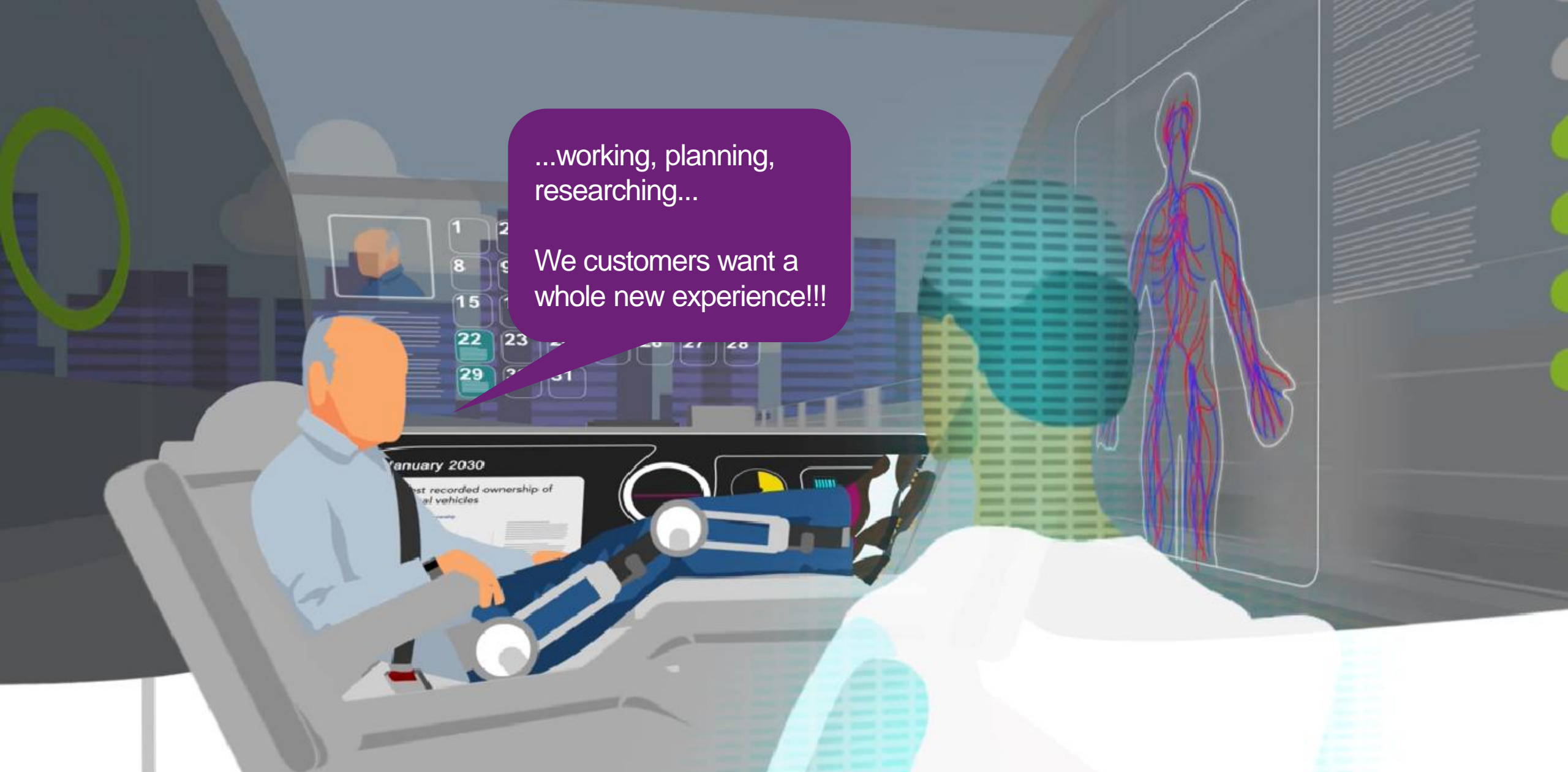
We customers want mobility services offering ways of studying, shopping, entertaining, playing...



What will the future mobility ecosystem look like?

...working, planning,
researching...

We customers want a
whole new experience!!!



MARTECH TODAY ADS MARKETING CONTENT SOCIAL SALES ANALYTICS MGMT MORE EVENTS

Will autonomous vehicles provide the next screens for publishers and advertisers?

New Forrester report suggests self-driving vehicles could become a new universe of moving living rooms.

Barry Levine on August 3, 2017 at 2:26 pm



By 2030 data and mobility services
are predicted to generate

\$1.5 TRILLION IN REVENUE⁶



drawbridge

CONTACT US

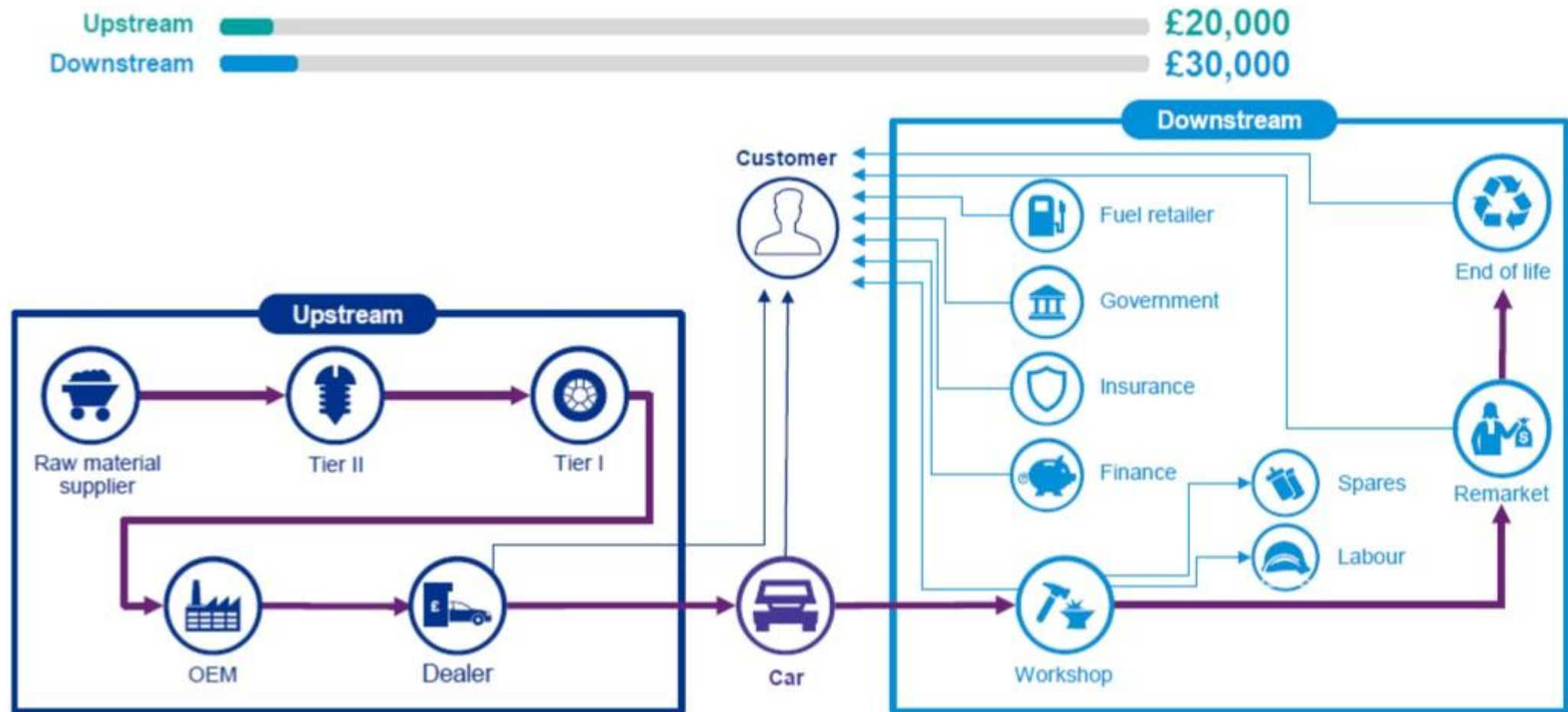
LOG IN

Web-browsing inside a Tesla Model S (one month period)

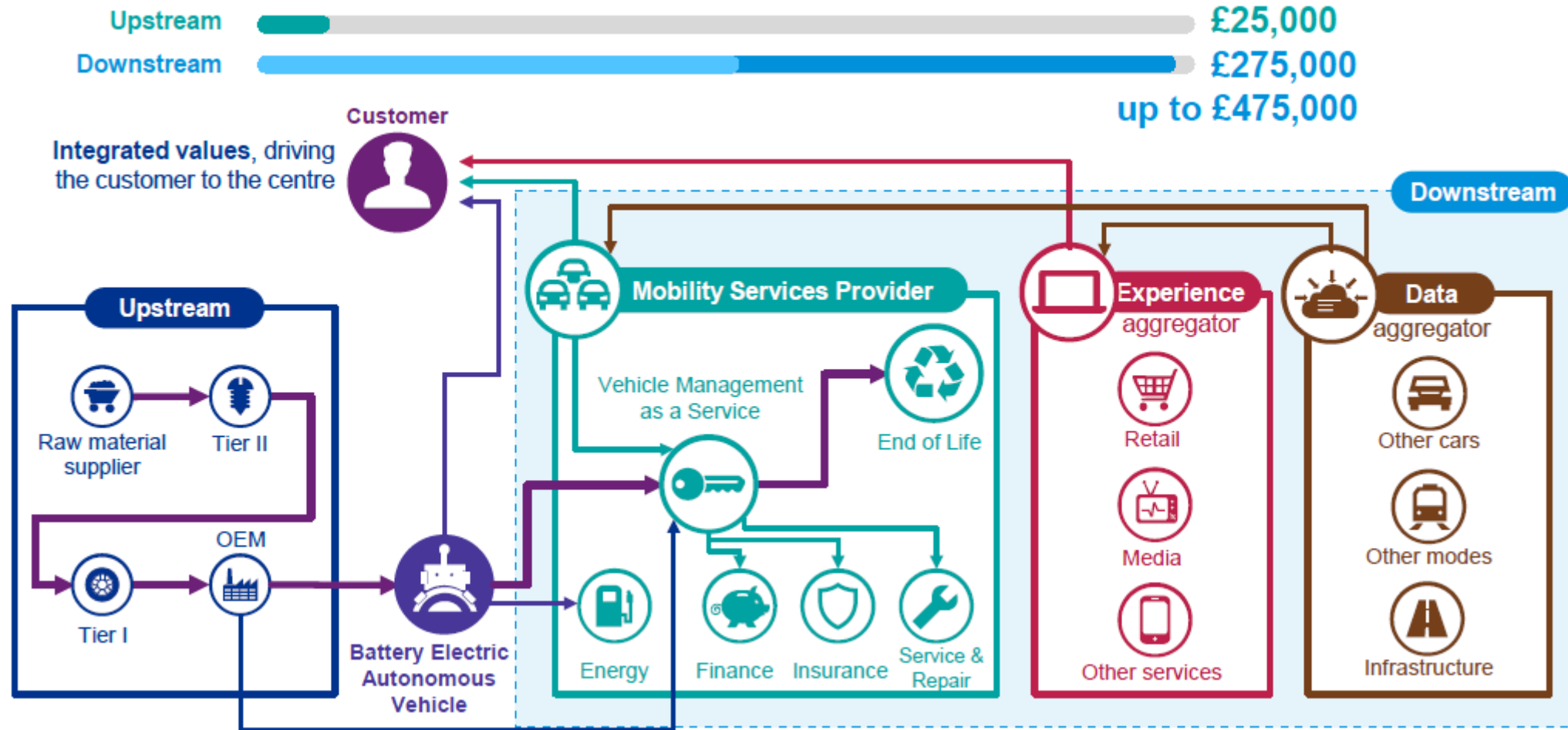
- 56% -- News content
- 23% -- Sports-related content
- 18% -- Food and drink
- 17% -- Shopping
- 14% -- Travel
- 10% -- Real estate



What will the future mobility ecosystem look like?



What will the future mobility ecosystem look like?



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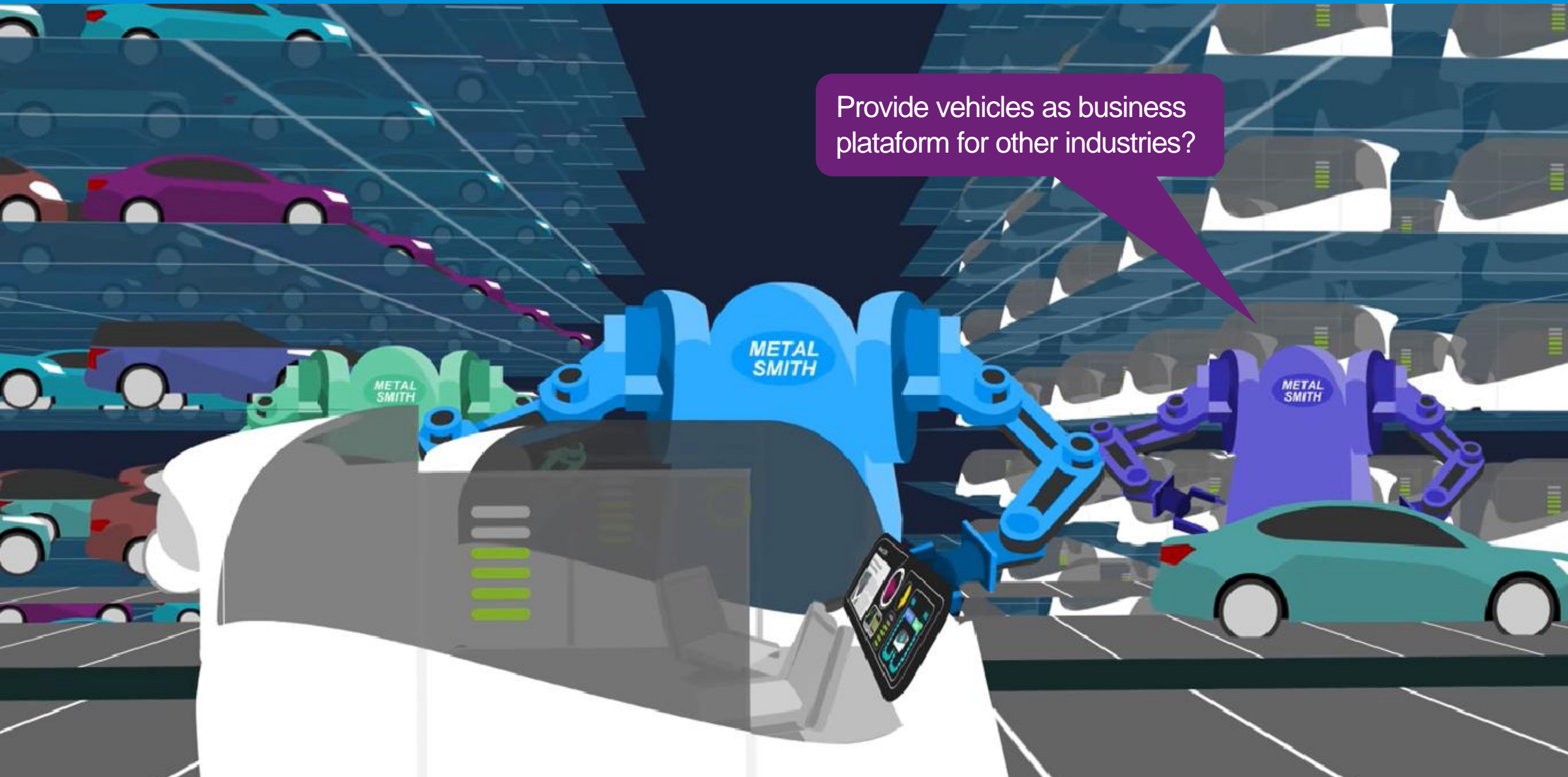
What will the future mobility ecosystem look like?

The question is: which of the two will be the roll of the automotive industry in this future ecosystem?

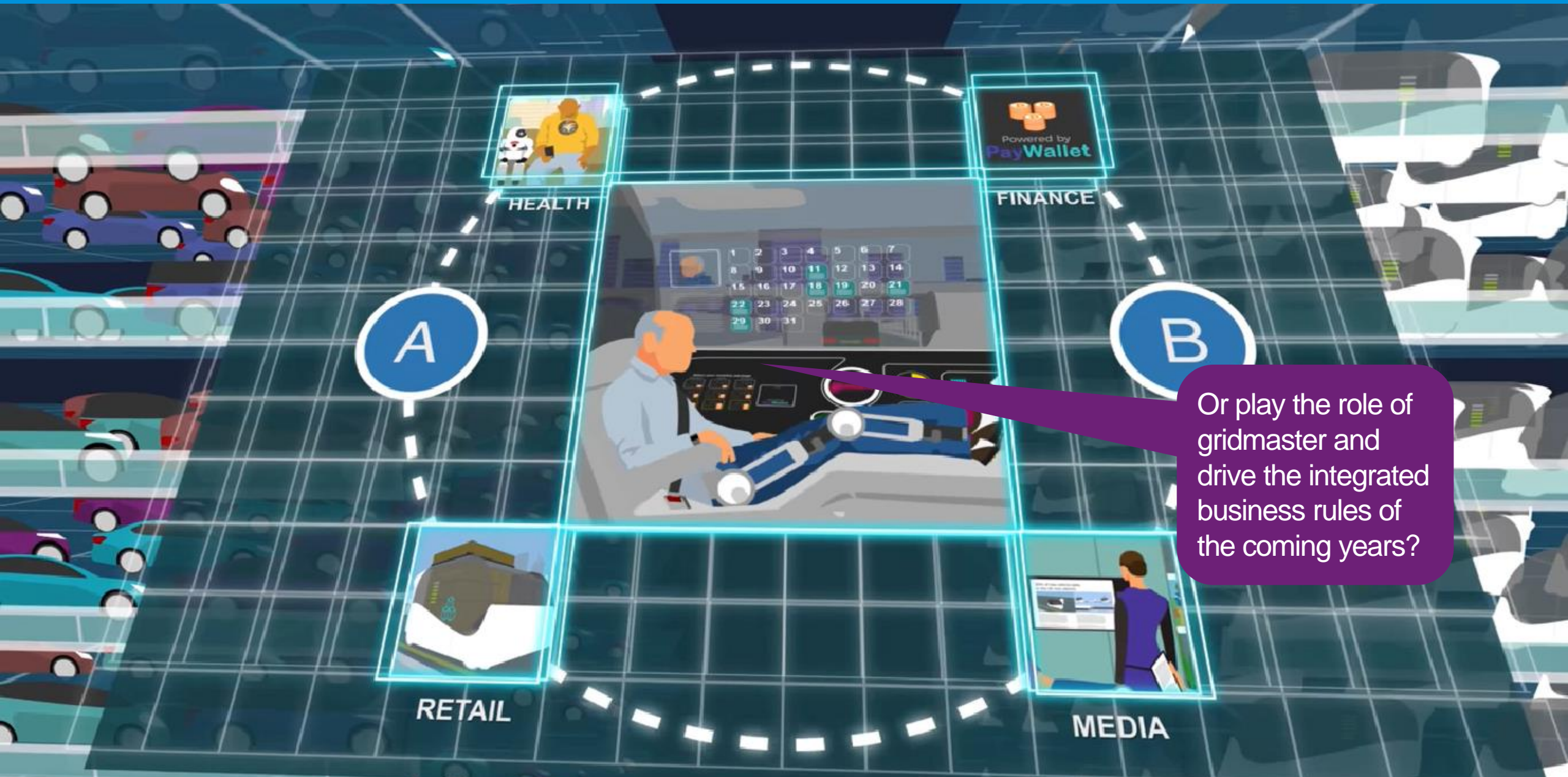


What will the future mobility ecosystem look like?

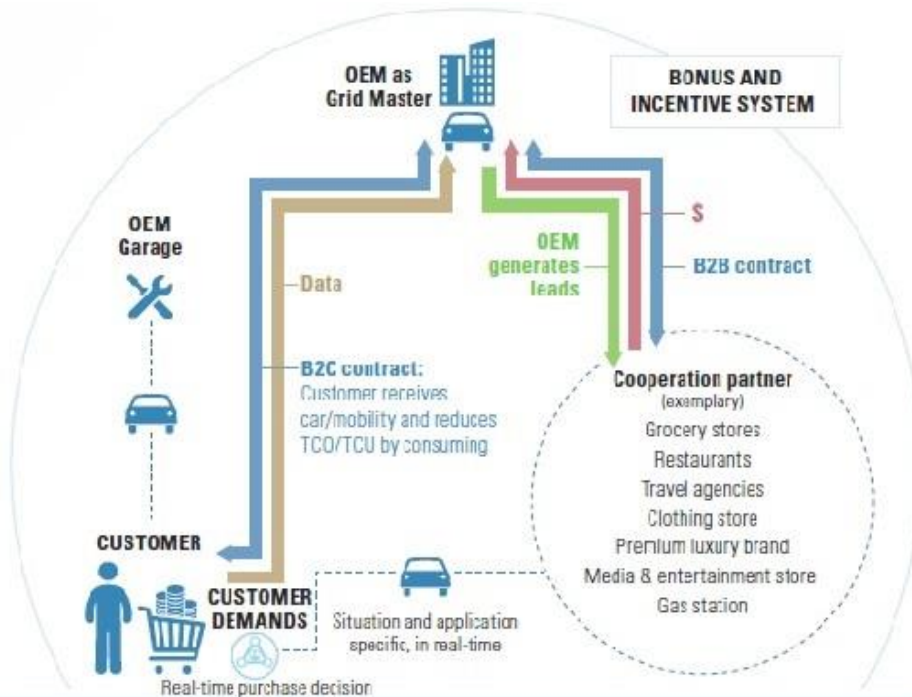
Provide vehicles as business platform for other industries?



What will the future mobility ecosystem look like?



What will the future mobility ecosystem look like?



Customer has two accounts at the OEM



cutting through complexity

Metalsmith or Grid Master:

The automotive industry at the crossroads of a highly digitalized age

kpmg.com/automotive

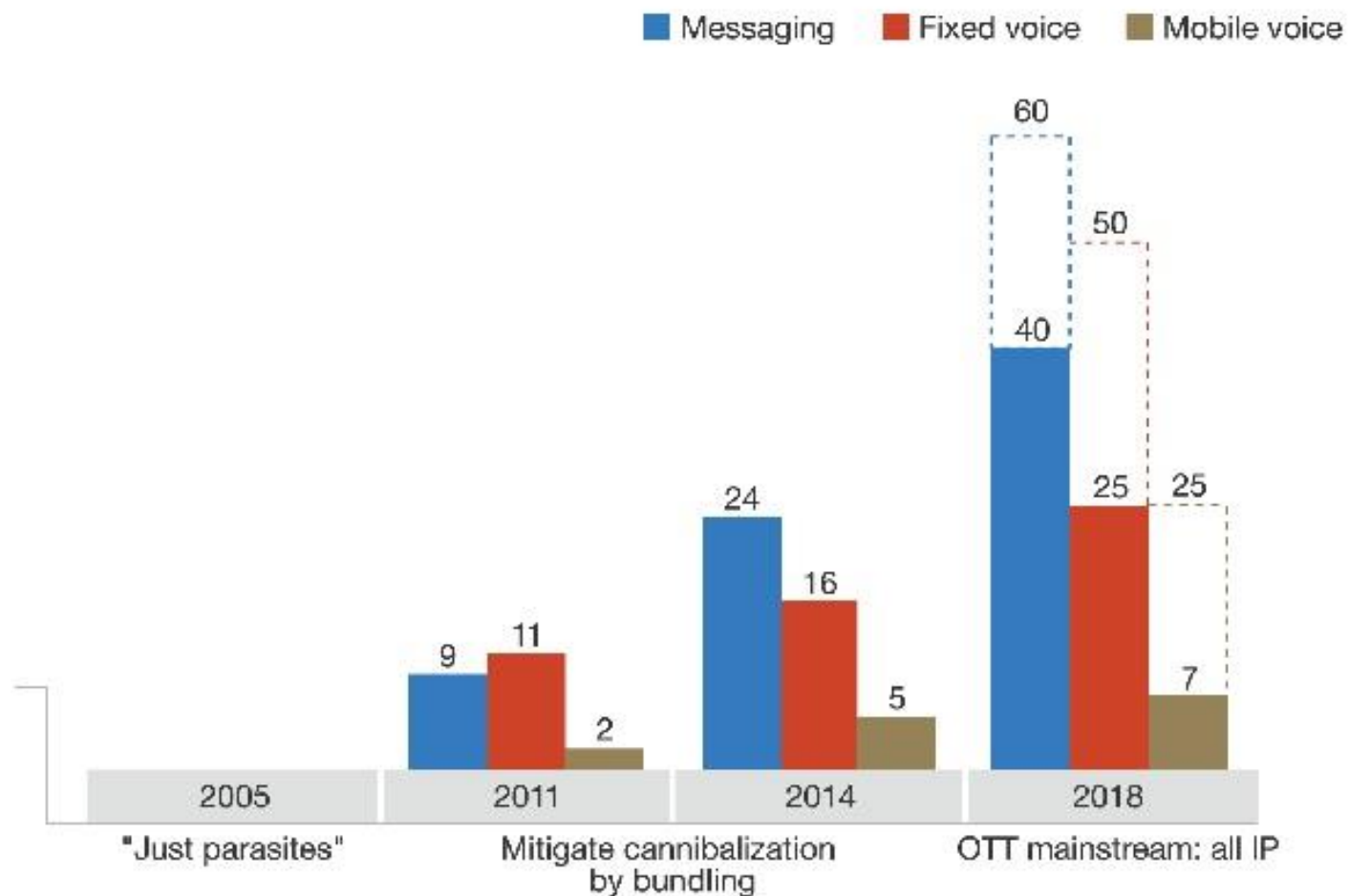
KPMG INTERNATIONAL



What will the future mobility ecosystem look like?

OTT's share of traditional telco services will dramatically increase by 2018.

Over-the-top (OTT) revenue cannibalization, relevant revenue, %



What will the future mobility ecosystem look like?



Source:

<https://usa.visa.com/visa-everywhere/innovation/visa-connected-car.html>



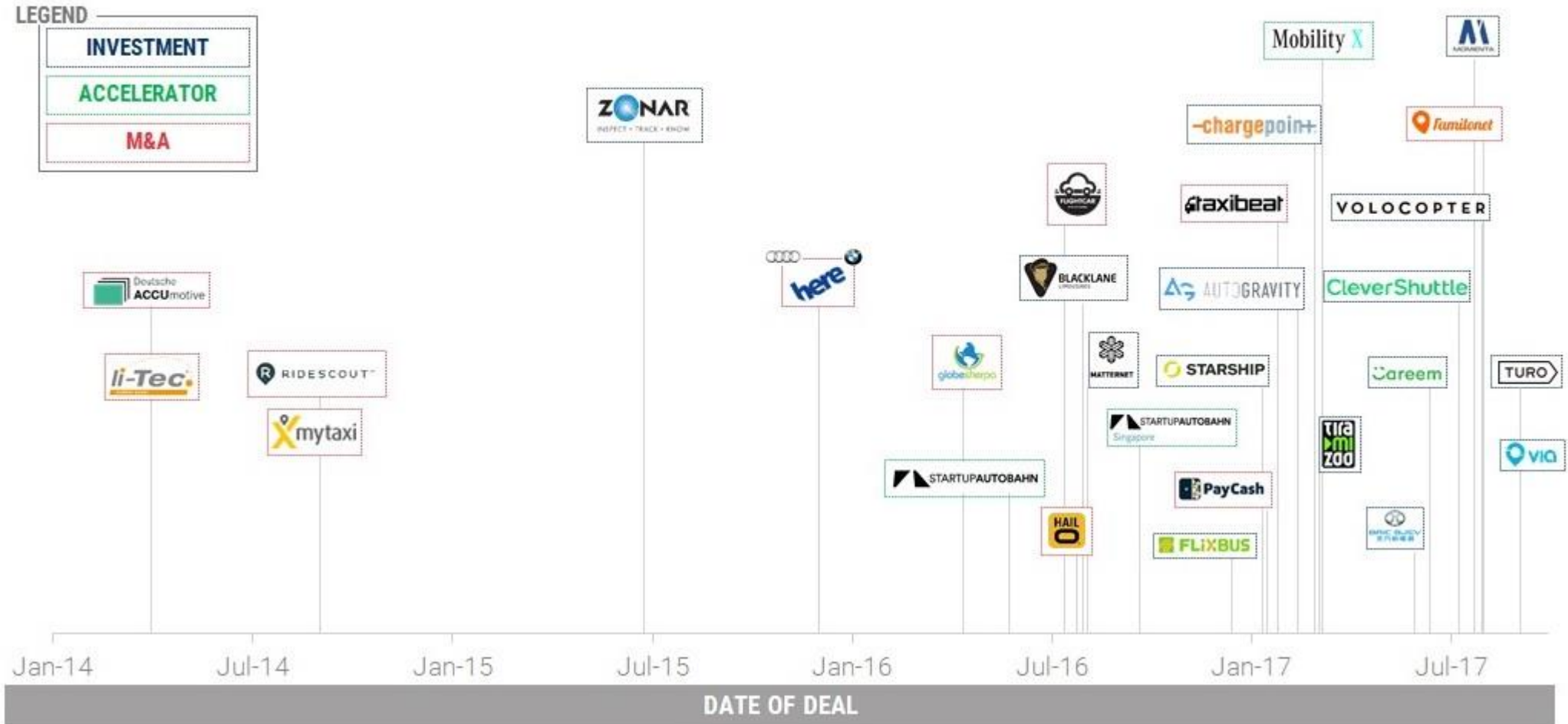
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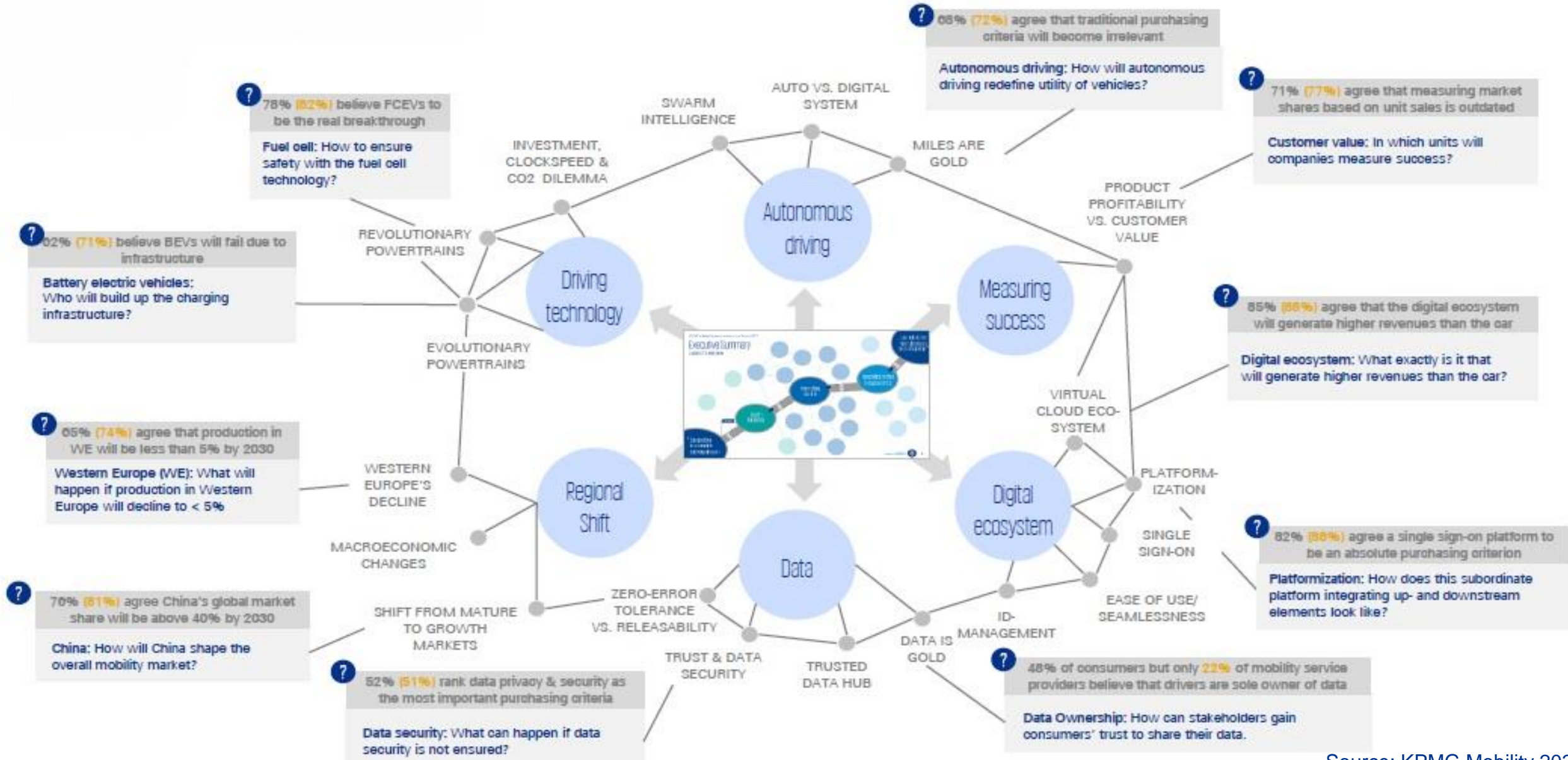
John **orders lunch** for pick-up through his **in-car app**

What will the future mobility ecosystem look like?

DAIMLER & MOOVEL'S STARTUP AND ACCELERATOR ACTIVITY 2014-2017 YTD (9/6/2017)



What will the future mobility ecosystem look like?



What will the future mobility ecosystem look like?



Rota 2030

Group 1) Restructuring of the auto parts value chain

Group 2) R&D and engineering

Group 3) Energy efficiency and new powertrains technologies

Group 4) Vehicle safety, technical inspection and fleet renewal

Group 5) Low volume production – premium vehicles

Group 6) Cost structure, competitiveness, labor issues

Rota 2030



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Rota 2030



RenovaBio

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Rota 2030

Blind spots

"One of the other major blind spots for executives is viewing cyber security as an IT risk only.

When you treat cyber security as an IT risk only, you risk missing opportunities and inflection points that could help fuel business growth."

Greg Bell
Co-lead, Global Cyber Security,
KPMG International

kpmg.com/CEOoutlook
#CEOoutlook

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Rota 2030

Strategy, risk and culture
should be tightly connected

Culture needs to be embedded in the company's decision-making processes, including strategic thinking, risk management and compliance, performance, and the incentives driving these activities.

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Group 2) R&D and engineering

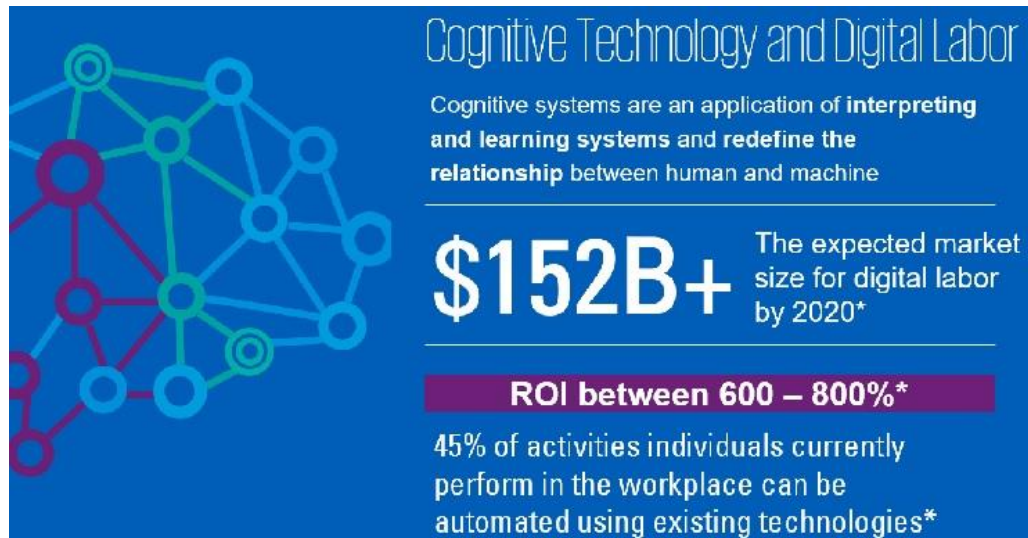
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Thank you

Ricardo Bacellar

Head of Automotive

KPMG in Brazil

rbacellar@kpmg.com.br

(21) 98833-3000

<https://br.linkedin.com/in/bacellar>



www.kpmg.com/automotive

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