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# Hype & the changing face of technology in transport:

Energy, connectivity, autonomy, and the sharing economy.





We've come a long way..







# Which emissions exactly...?





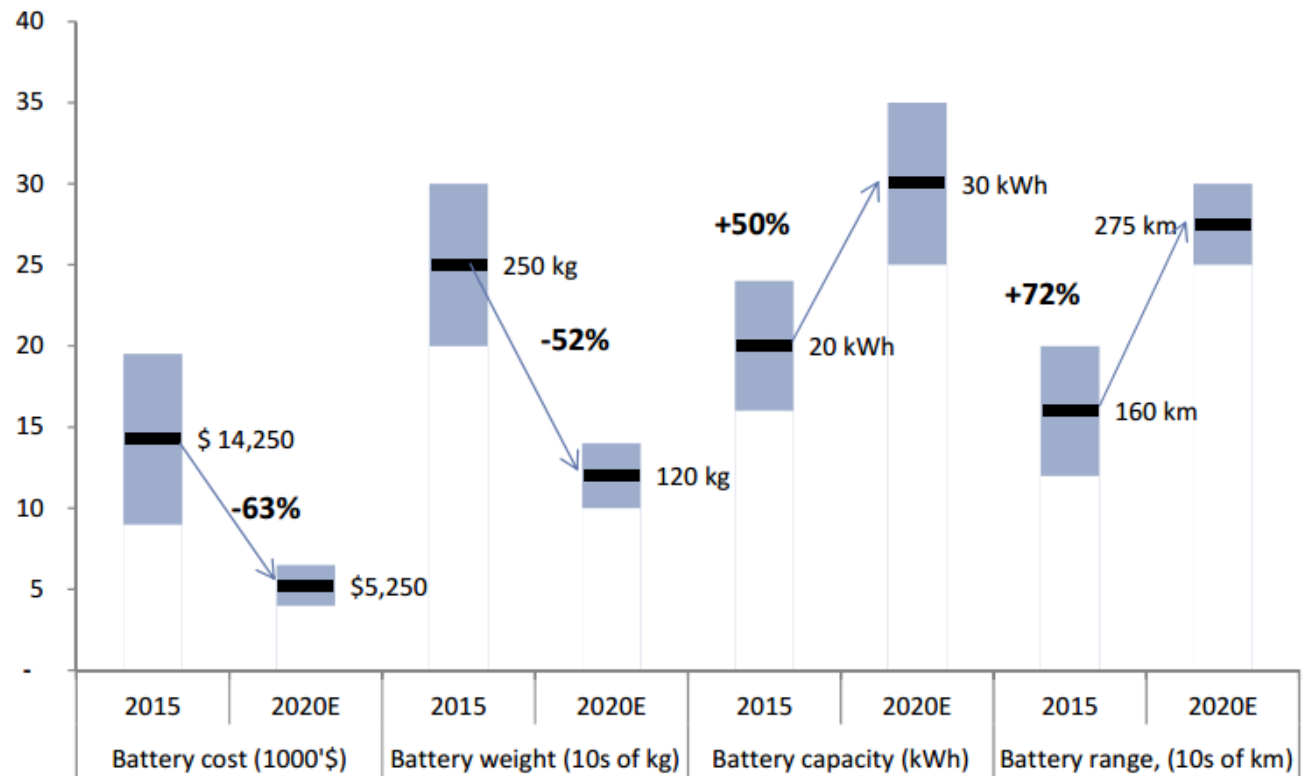
## Key moments in time...





# It's a lot to do with batteries...

## Battery cost reduction/performance improvements



Source: NEDO, Goldman Sachs Global Investment Research.





## Why? For example:

# TESLA GIGAFACTORY

50 GWh in annual battery production by 2020  
Enough for 500,000 Tesla cars  
Powered by renewable energy  
Net zero energy factory



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But...





## The next big thing...







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## Real value on the journey...





## And for the operator...





# The next 'as a Service'...?



New...

Entrants to market

Business models

Customer relationships

•→• Citymapper







## The nub of the issue...

Demand responsive  
transport (DRT)  
increases, cost  
decreases





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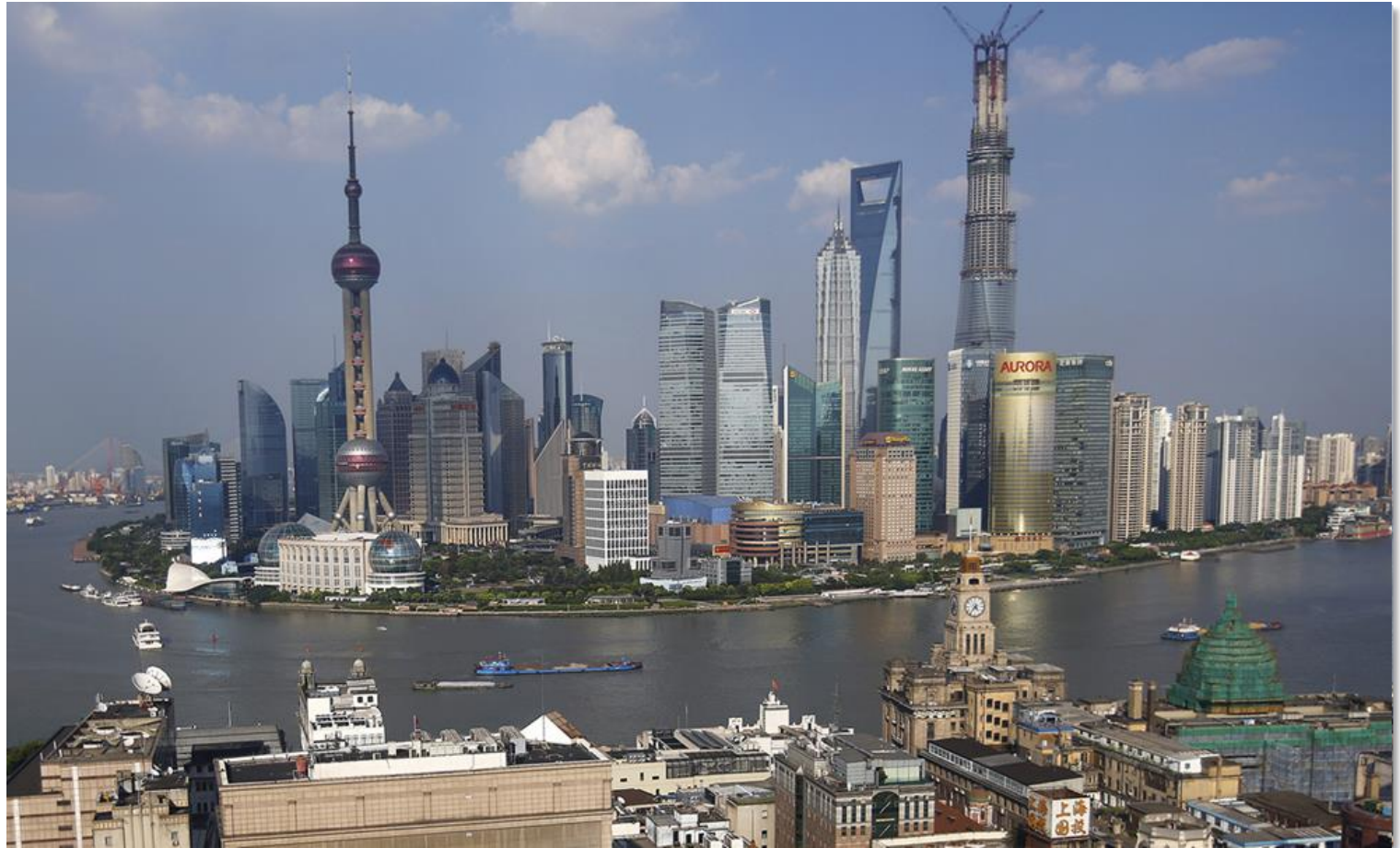
# The importance of location...







# And finally...







# Thank you



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