Our Identity
A global market research and consulting company

• Market research and consulting company
• 50 years of experience
• 40+ offices worldwide ⇒ global coverage & local expertise ⇒ Collaborative Network
• Sector-based organisation ⇒ 9 divisions, including Energy
• 1,500+ employees across the globe, of which >800 consultants & analysts

Sector-based organisation
>40 offices worldwide
Our Global Footprint 40+ Offices
Scanning the Globe for Opportunities and Innovation
Our Industry Coverage
A global coverage through a collaborative network of local industry experts

- Aerospace & Defense
- Measurement & Instrumentation
- Consumer Technologies
- Healthcare
- Automotive
- Energy & Power Systems
- Environment & Building Technologies
- Information & Communication Technologies
- Transportation & Logistics
- Minerals & Mining
- Chemicals, Materials & Food
- Electronics & Security
- Industrial Automation & Process Control
Our Automotive Team

150 dedicated analyst & consultants conduct over 100 consulting projects every year, with a focus on urban mobility in the last 5 years – electric vehicles, micro-mobility, carsharing.

### Mega Trends Impacting Mobility
- Urbanisation – City as a Customer
- Social Preferences
- Energy Production / Usage
- Smart is the new green
- Connectivity & Convergence
- Innovating to Zero
- Economic Changes: Beyond BRIC
- Value for Many
- Health, Wellness, and Wellbeing
- Infrastructure Trends
- eMobility

### New Mobility Trends
- Electric Vehicles
- Alternative Car usage models
- Smart Ticketing & Payment
- New Powertrain Solutions
- Personal Rapid Transit (PRT)
- Micro Mobility
- Integrated Mobility
- Mobility Budgets – New Way to Work

### Urban Logistics
- Hub & Spoke Logistics Model
- Rise of eRetailing
- Hybrid & Electric Powertrain
- Comfort & Convenience
- Health, Wellness & Wellbeing

### Car Sharing
- Extensive Market Research globally
- Strategic insight & KPI Analysis
- Detailed overview on vehicles used (e.g. EVs & associated incentives)
- White Papers & Marketing/Investor Relations
- Customer Research & End User Analysis
- Business Model analysis & differentiation

### Public Transport
- High Speed Rail
- Bus Rapid Transit (BRT)
- Real Time Information
- Multi Modality & Journey Planning
- Transport Operators

### Technology & Opportunities
- Connected Car
- Intelligent Transport Systems
- Autonomous Driving
- In Vehicle Infotainment
- Automated Fare Collection & eTicketing
- V2V & V2X Communication
- Real Time Data sharing
- Social Networking and Media

### Voice of Consumer Surveys
- Detailed data collection on specific topics
- User & Non User Analysis
- Themes Covered to date:
  - Car Sharing
  - LCV Fleet Telematics “Willingness to pay”
  - Urban Mobility Tracker
Growth Consulting
We cover the main business areas contributing to sustainable business growth, leveraging our research service and going beyond

Market/Product Entry Strategies
Competitive Benchmarking
Market Potential Assessment

Business Planning/Modelling
Channel Management
Mergers & Acquisitions

NEW MARKETS
DIFFERENTIATED PRODUCTS

F R O S T & S U L L I V A N
Growth Consulting
Sample list of projects showcasing Frost & Sullivan capabilities in evaluating strategic opportunities and business cases within the mobility market

<table>
<thead>
<tr>
<th>Client</th>
<th>Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>European Wind Power Association</td>
<td>Analyse and develop e-Mobility and carsharing business models to operate in Estonia</td>
</tr>
<tr>
<td>European Vehicle Manufacturer</td>
<td>Analyze and develop suitable business model and case on Car Sharing</td>
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<tr>
<td>European Car Sharing Operator</td>
<td>Helped in global expansion program and IPO process</td>
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<tr>
<td>UK National Policy Department</td>
<td>Advising on Mobility Trends &amp; Drivers, and Significance from a National Policy Perspective</td>
</tr>
<tr>
<td>European Transport Operator</td>
<td>Analyse the potential for Carsharing through customer research and support in setting up a car sharing business in Nice City</td>
</tr>
<tr>
<td>Leading end-to-end system solutions provider</td>
<td>Strategic overview and Opportunity Assessment of new mobility concepts in the UK and Ireland Transportation Networks</td>
</tr>
<tr>
<td>Leading NGO for Sustainable Development</td>
<td>Identify &amp; analyse the global mobility solutions that can be implemented by cities to mitigate various pre-defined indicators</td>
</tr>
<tr>
<td>Leading Japanese Conglomerate</td>
<td>Assessing the opportunities for the Intelligent Transport System in key Brazilian cities by analyzing the Macro/Scio-economic trends</td>
</tr>
<tr>
<td>Leading IT and Technology service provider</td>
<td>Analyzing the market and key technology trends in Transportation Infrastructure, Automated Fare Collection, Information Management, payment, and value added services</td>
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</tbody>
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