



Post-Covid Likely Winners & Losers

Kollektivkonferansen 2020
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ORSAY CONSULTING
Preparing for the Mobility Revolution
Palo Alto, Silicon Valley

Mobility Transforming with 4 Megatrends

All modes of transportation are going **ELECTRIC**



Driving is incrementally **AUTOMATED**



CONNECTIVITY enables many value adding services



Mobility is increasingly **SHARED**, adding new modes



Covid Crisis Massively Impacts Behaviors



Appreciation for clean air & low congestion

Fear of contamination in dense environments



Rediscovered pleasure of active mobility mode

Shift to EVs driven by incentives & clean air



Accelerated e-commerce and home deliveries

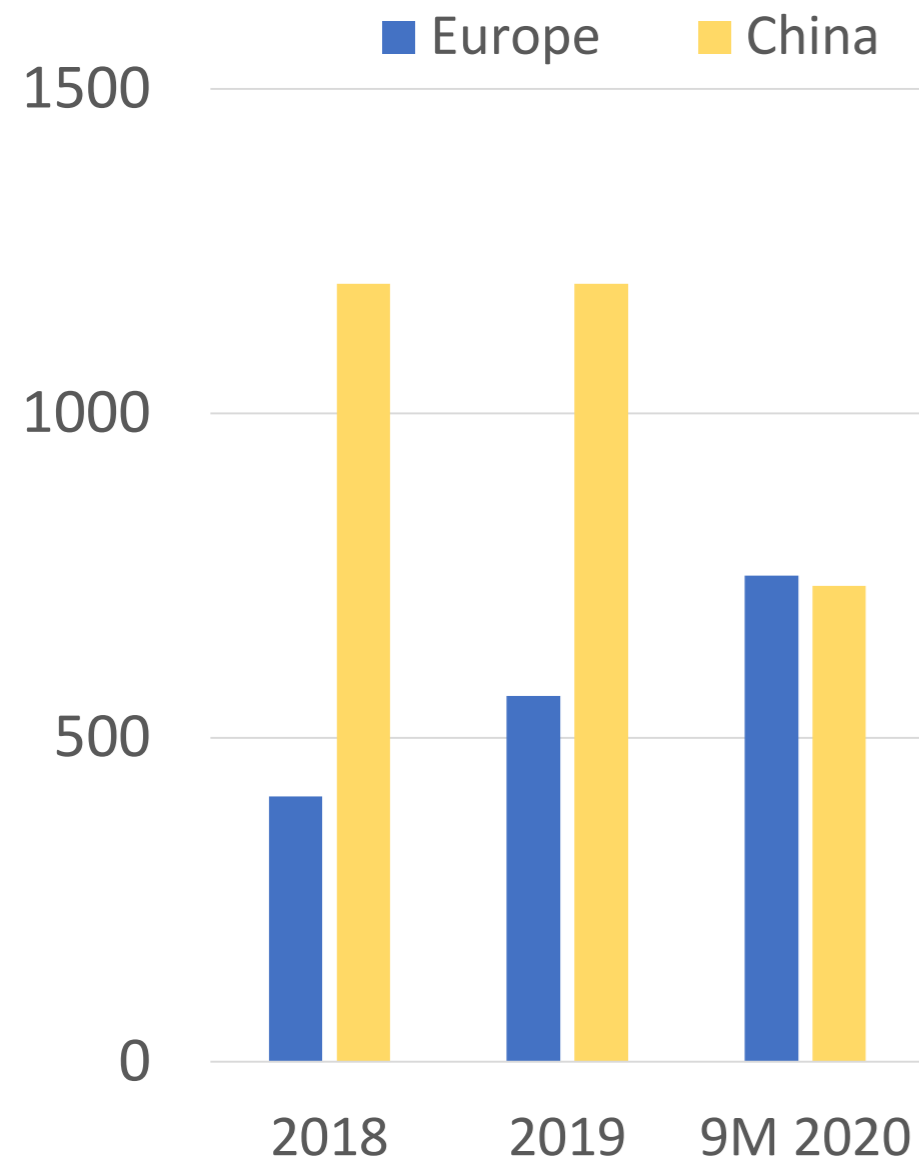


Increase focus on equitable access to mobility



Electrification is Booming ... Mainly in Europe

'000 Plug-in Veh



Passenger Vehicles



Deliveries & Buses



Active Modes

Cities Adapt to a New Modal Mix

Barcelona
Copenhagen
Heidelberg
London
Oslo
Paris
Seattle
Quito
Vancouver
...



ICE Vehicle Ban

Open / Slow Streets

Transit Preservation

Urban Economics

Goods Transportation, Logistics Deeply Transformed



Automation priority shifted from passengers to goods



Accelerated electrification for urban delivery

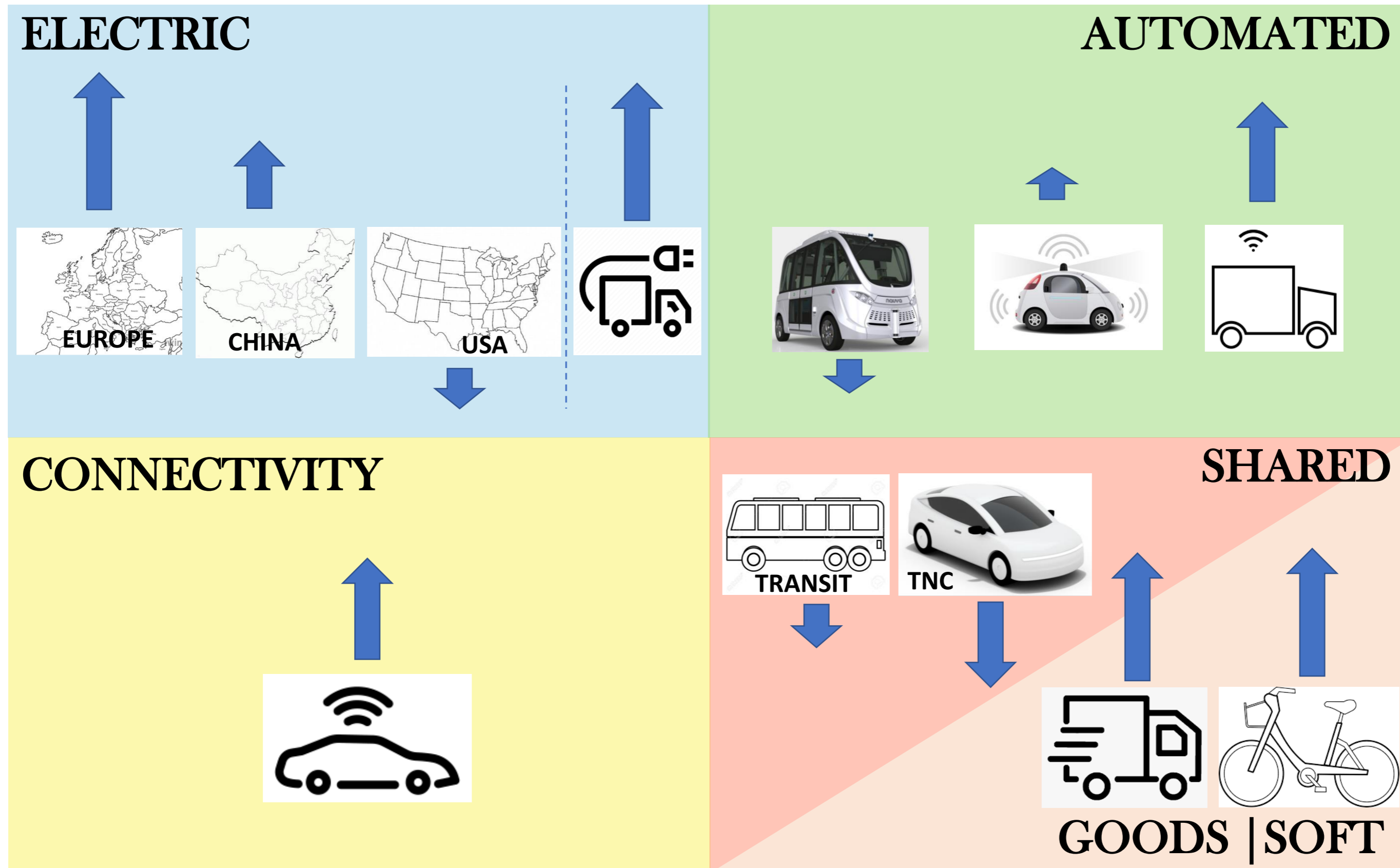


Delivery rationalization driven by boost in volume



Touchless deliveries

Past Trends Remain but are Distorted



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Monthly Newsletter “[Mobility Revolution](#)”

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