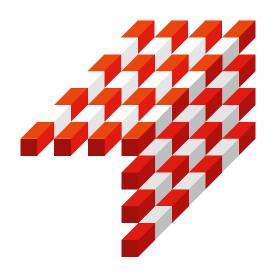
Mapping the road to autonomous driving

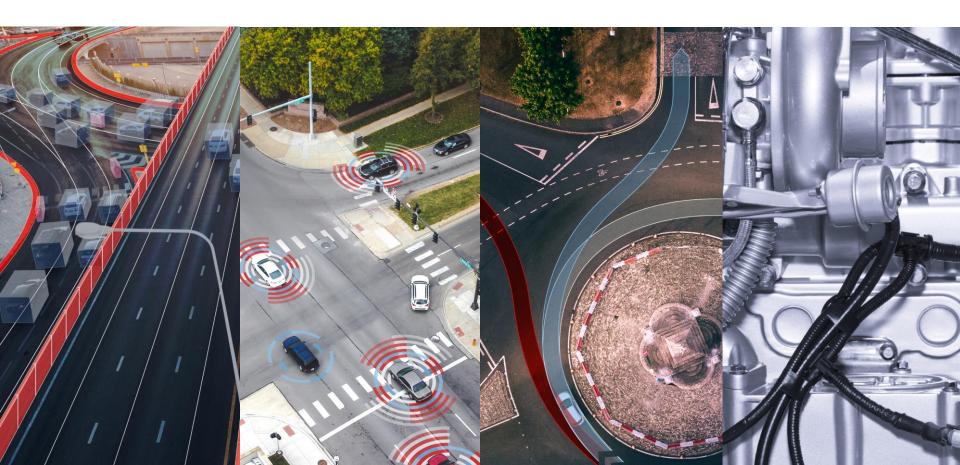


Willem Strijbosch
Head of Autonomous Driving





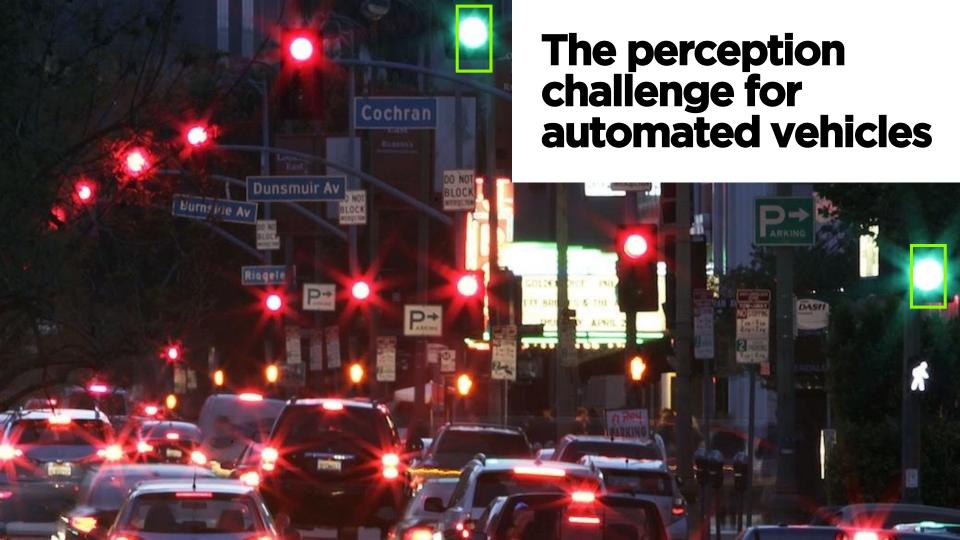
The pillars of autonomous driving





TomTom maps for ADAS & AD

LEVEL O	LEVEL 1	LEVEL2	LEVEL 3	LEVEL 4	LEVEL 5
Driver controls all aspects of driving	Automated subsystems	Combined automated subsystems	Hands-off conditionally	Automated on certain roads	Automated on all roads
ADAS Map	ADAS Map	ADAS / HD	HD Map	HD Map	HD Map
	ADAC			AD	

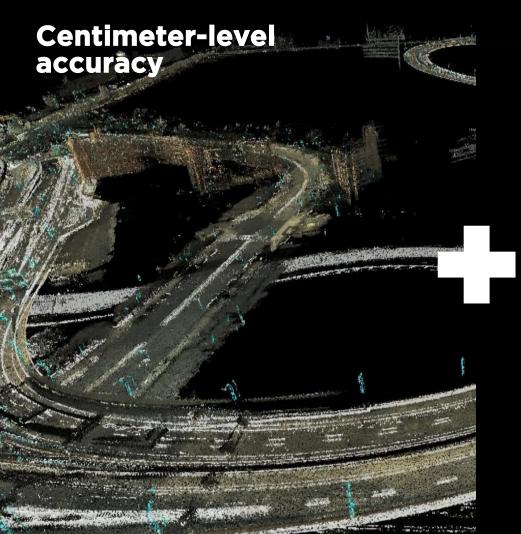


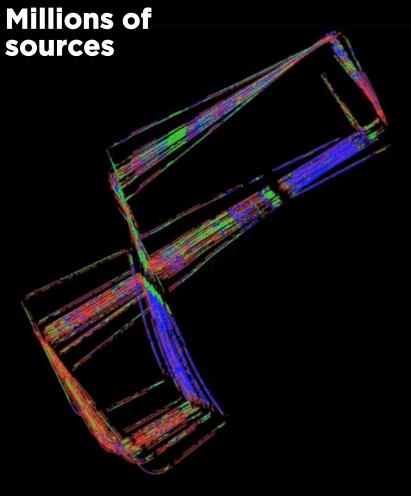


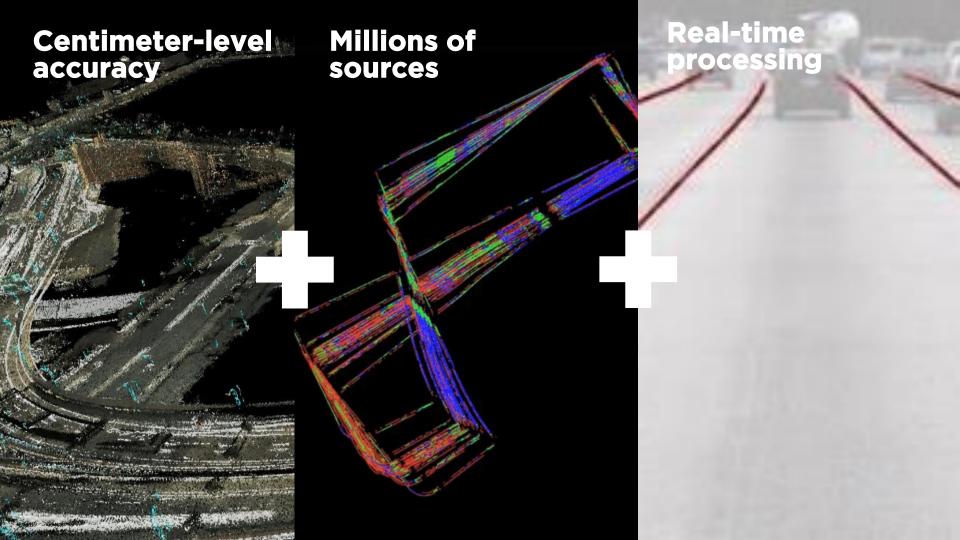


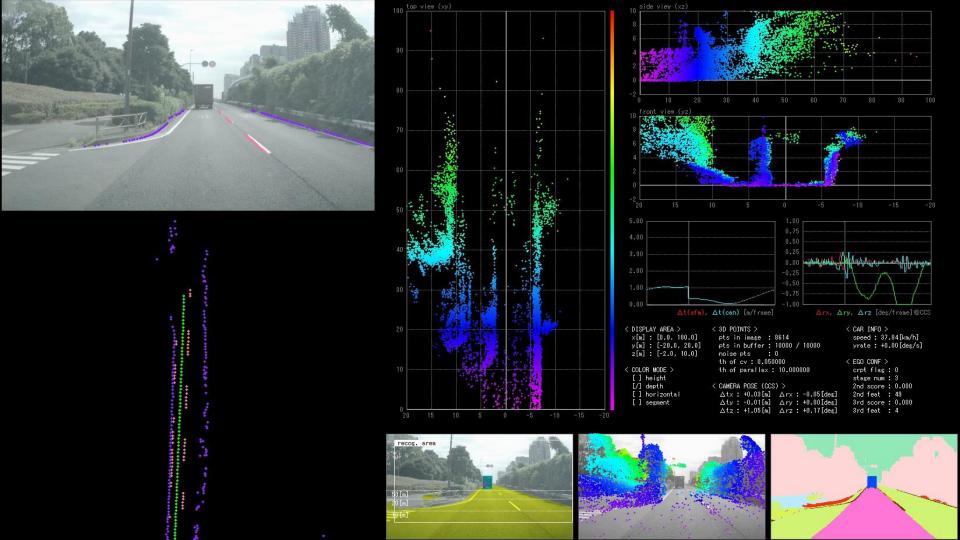
How do we make HD maps?











AutoStream

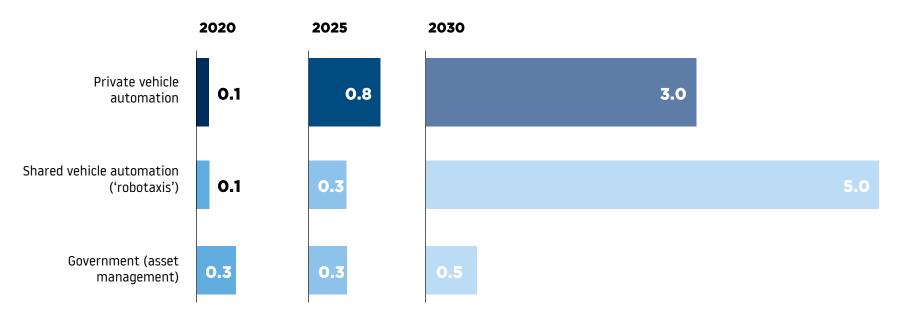
Map Delivery for Autonomous Driving

Start



Large opportunity, first in private vehicles, later in robotaxi

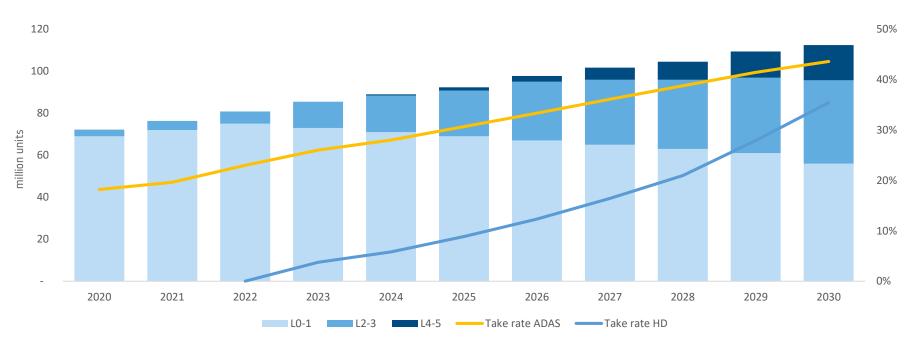
Market value (€ billion) - all products (ADAS Map, HD Map, Hazards Service)



Rising volumes in levels of automation

Technology developments bringing new and improved features into the car and driving costs down for consumers

Vehicle volumes & ADAS and HD take rates



Competitive advantage

Customer experience

- Automotive sales force
- Cumulative domain knowledge
- Global presence
- Independence

Leading technology

- Transactional map making
- Shortest cycle times
- Technology built up over the years (AI, computer vision)

Most complete product portfolio

- AutoStream
- SD Map
- Real-time service capability (Live Map)
- Automotive system integration services



TOMTOM LEADS IN HD MAPS



MARKET SHARE IN AWARDED DEALS AS MEASURED BY TOTAL CAR VOLUME



GLOBAL MAPPING COMPANY THAT HAS FULL AUTONOMOUS STACK IN HOUSE FOR TESTING AND DEMONSTRATION





TO COVER HIGHWAYS IN EUROPE, US, JAPAN, SOUTH KOREA

Thank you

