

# FCA: Innovation Era of Connected Car Localization

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# Cars in China are different

# China's economy & Growth

**127.6T RMB**

*Size of US Economy*

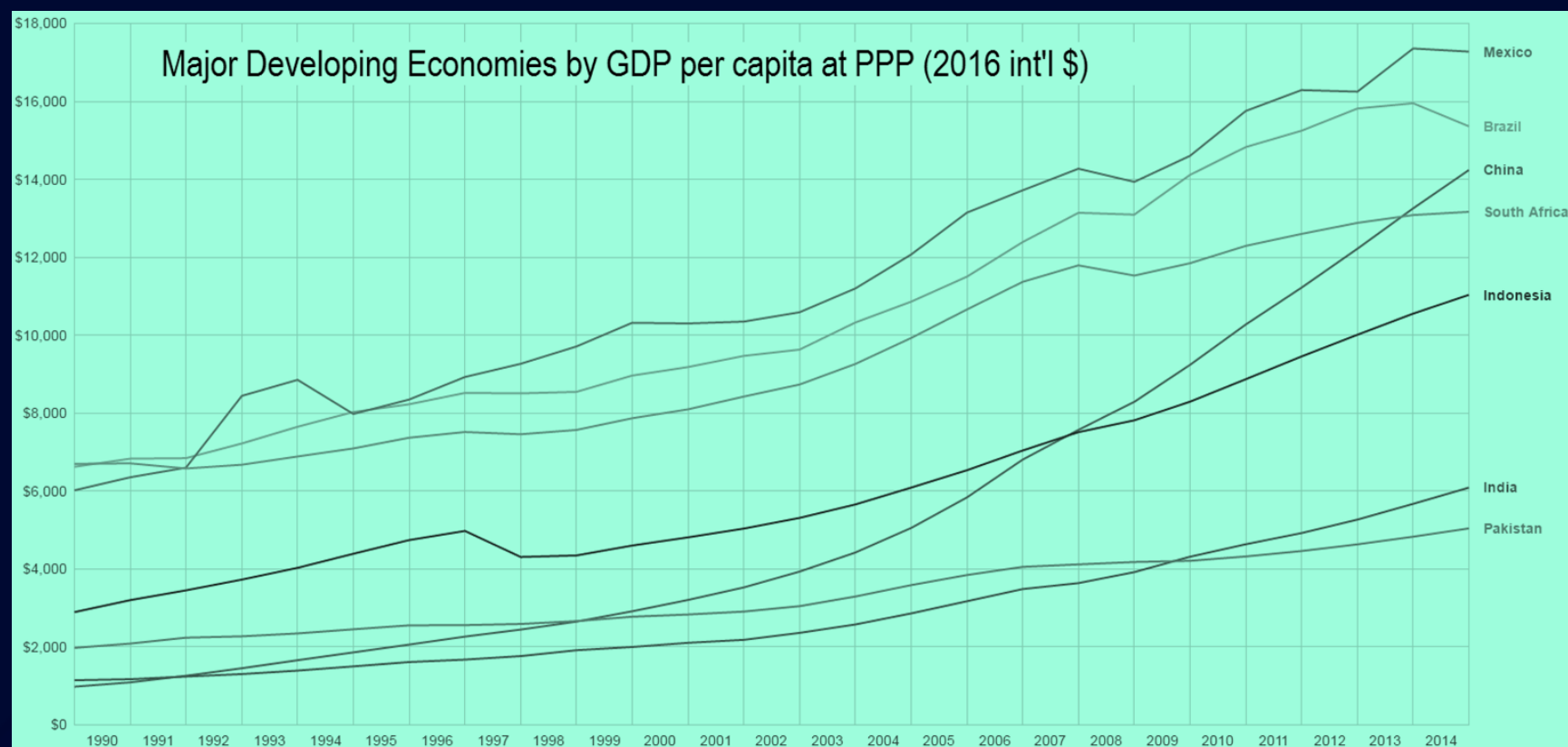
*Growing at 2.3%*

**87.5T RMB**

*Size of China's Economy*

*Growing at 6.9%*

Major Developing Economies by GDP per capita at PPP (2016 int'l \$)



# Cars from around the world



**USA love their pickup**



**Brazilians like  
Hatchbacks**



**Small cars in India**



**Of course Japan has K Cars**



# China's needs are different

- Family is important
  - Room for parents during the weekend
- Luxury cars are not driven by owners
  - Owner sits in 2<sup>nd</sup> row
- Plates for cars are at a premium in major Metropolis
  - Life of car is extended beyond 5 years



## FCA follows China trend

- Family is important
  - GACFCA introduced a 3 row Jeep
  - Designed for China in China
  - On sale for China only, but other markets are calling
- Plates for cars are at a premium in major Metropolis
  - A PHEV version will be released as well
  - Minivan(Pacific) PHEV is available today





# Telematics are making Chinese cars different

# Customers are more interested in driving-related car features

Would you switch from your current carmaker to another carmaker you trust if it was the only one offering these functionalities? Which functionalities would make you switch?

Driving-unrelated data-based services(e.g. access to telephone, email, web browsing)

41%

## Driving-unrelated

- Telephone & email
- Messaging services & social media
- Web browsing, news services
- Personal music/video library & streaming
- Games

Driving-related data-based services(e.g. connected navigation, networked parking)

60%

## Drive Related

- Connected navigation
- Networked parking
- Workshop and after-sales services
- Personalized insurance
- Mobility solutions
- Automated platooning
- Autopilot in selected environments
- Self-parking private property
- Automated collision prevention(incl. automated braking)
- Fully autonomous driving

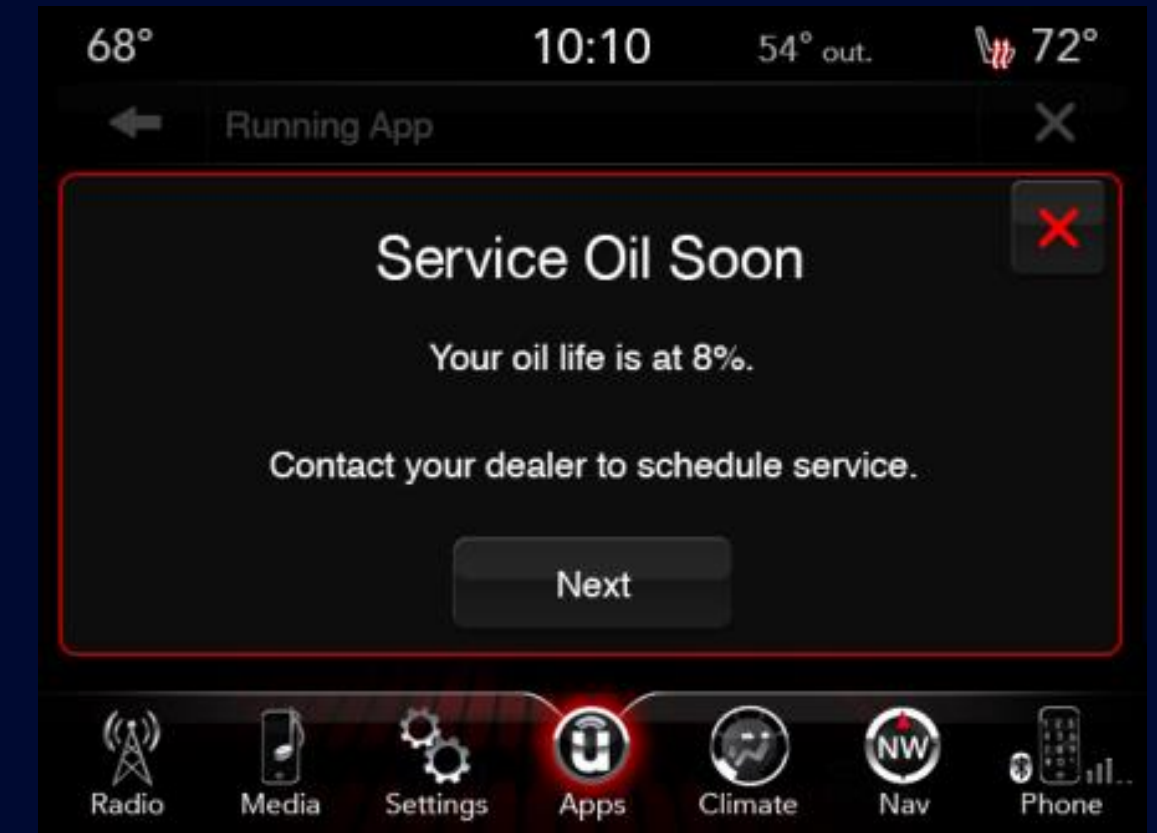
Data-enhanced driving functionalities(e.g. autopilot, automated collision prevention)

55%



# Features are different

- Global OEM drives for standardization
  - Vehicle architectures are Global
  - Radio are commonly sourced
  - Global Cloud solutions
- Global OEM will build common Global features
  - Remote start
  - Vehicle locate
  - Wi-Fi
  - Driver Alerts
  - Connected POI Search
- Again China is Different





## Features will make a difference

Development of new features in the car takes time

- Cycle time to roll out a new feature in a car takes 12 to 18 months or 36 months for major
- Release cycles in the Automotive industry is important to maintain serviceability

Features that are off board (software not in the vehicle) is much faster to develop

- Strong move by Automakers to move to off board features
- Deployment and release cycles are shorter
- Features can be used on vehicle or off vehicle



2013

2017





# Features will morph into Services

Services drive the Chinese Automotive market

- Ride home after party - Dai Jia
- Ride share MeiTuan and Didi

To make a feature offered with vehicles become a service for our customer

Global OEM will need a strong partner

- Must be Local
- In the area of Off Board (Internet, Cloud Services)



## Internet Companies have strong Off Board

Internet Companies such as Tencent offer this opportunity

FCA decides to engage a China based Internet company

Built on providing service to the Chinese market

Eco system of Tencent is powerful

Open, Flexible, adaptable

Strong AI and ML capability

AI in car – an individualized solution based on Tencent's advantages, including security, content, social, voice, big data, AI, etc.





## Scope for Features / Services is endless

- Control capabilities in the car with Voice Recognition VR
- Obtain real world information through VR
- Let AI help make decisions while driving
- Access off board services from on board
- Autonomous driving capabilities will use off board capabilities
- Smart cities combine off board and on board features





谢谢

Thank you