Smart Mobility City Tracker Multi Client Study

A Unique Global Initiative to Identify Smart Mobility Opportunities in 100 Key Smart Cities of the Future

Presentation by: Franck Leveque
Partner & Mobility Group Head
Strategic Imperative – A fact based analysis to better understand the evolution of mobility in leading cities around the world

In 2011, Frost & Sullivan launched an Urban Mobility Tracking Program covering

<table>
<thead>
<tr>
<th>CUSTOMER RESEARCH</th>
<th>CITY PROFILES</th>
<th>CLIENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>travel patterns, modes of transportation, journey experience, perception and attitudes, unmet needs and future mobility solutions</td>
<td>geography, demography, economy, transportation infrastructure, plans, regulations, etc.</td>
<td>Governments, Public Transport Providers, OEMs, Mobility Service Providers and other stakeholders in the transportation value chain.</td>
</tr>
</tbody>
</table>

NOW a *Smart Mobility City Tracker Program* to analyse top 100 smart cities globally

- Key transportation metrics and new mobility solutions
- Regulations, policies and political environment
- Digitisation strategy and initiatives

Systematic and structured analysis of leading cities enabling robust clustering and strategic implication definition
Global Snapshot of Smart Mobility Cities That We Will Track

**NORTH AMERICA**
- Austin
- Boston
- Chicago
- Columbus
- Dallas
- Denver
- Kansas City
- Los Angeles
- Miami
- Minneapolis
- Montreal
- New York
- Philadelphia
- Pittsburg
- Portland
- San Antonio
- San Diego
- San Francisco
- Seattle

**EUROPE**
- Amsterdam
- Ankara
- Barcelona
- Berlin
- Birmingham
- Brussels
- Cambridge
- Copenhagen
- Dublin
- Duesseldorf
- Edinburgh
- Frankfurt
- Glasgow
- Hamburg
- Helsinki
- Istanbul
- Leeds
- Liverpool
- London
- Lyon
- Madrid
- Manchester
- Milan
- Moscow
- Munich
- Oslo
- Paris
- Rome
- Rotterdam
- Stockholm
- Vienna
- Warsaw
- Zurich

**AFRICA & ME**
- Abu Dhabi
- Cape Town
- Doha
- Dubai
- Durban
- Johannesburg
- Muscat
- Tel Aviv

**LATAM**
- Bogota
- Buenos Aires
- Mexico City
- Rio de Janeiro
- Sao Paulo

**APAC**
- Adelaide
- Auckland
- Bangalore
- Bangkok
- Beijing
- Chengdu
- Chennai
- Delhi
- Guangzhou
- Hangzhou
- Ho Chi Minh
- Hong Kong
- Jakarta
- Kolkata
- Kobe
- Kuala Lumpur
- Manila
- Mumbai
- Osaka
- Perth
- Seoul
- Shanghai
- Shenzhen
- Singapore
- Sydney
- Taipei
- Tianjin
- Tokyo
- Wuhan
- Yokohama

**Note:** Tentative list of Smart Cities. Only cities with population of over 500k have been considered. Cities can be adapted based on input from clients.
**Project Methodology** – Leverage Existing information and Complement with local expert interviews

### Secondary Research
- International Institutions
- Local governments, Municipalities & Universities
- Transportation & Mobility Publications

### Primary Research

#### Interview Categories

<table>
<thead>
<tr>
<th>Interview Categories</th>
<th>Interview Numbers per City (TBD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>City Planning Officials (Mayor office, Transportation Department, City Municipality)</td>
<td>2-4</td>
</tr>
<tr>
<td>Public Transport Operators</td>
<td>1-2</td>
</tr>
<tr>
<td>Key Mobility Service Providers</td>
<td>1-2</td>
</tr>
<tr>
<td>HW/ SW/ Technology / Analytics Providers</td>
<td>1-2</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>6-10</strong></td>
</tr>
</tbody>
</table>
Profile Fact Foundation - City Mobility Ecosystem Breakdown
# Deliverables – Three Types of Deliverables, supported by client interactivity at key milestones

<table>
<thead>
<tr>
<th>Deliverable Type</th>
<th>City Plan and Profile</th>
<th>Strategic/Cluster Analysis</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>PDF Report Profile</td>
<td>PDF Report</td>
</tr>
<tr>
<td></td>
<td>iFrost Platform</td>
<td>iFrost Platform</td>
</tr>
<tr>
<td>Short Exec Summary</td>
<td></td>
<td>Strategic Implications</td>
</tr>
<tr>
<td></td>
<td>Executive Presentation</td>
<td>Strategic Workshop</td>
</tr>
<tr>
<td>Frequency</td>
<td>Quarterly</td>
<td>Annual</td>
</tr>
</tbody>
</table>

![Report Image](Image)

**City Plan and Profile**
- PDF Report Profile
- iFrost Platform

**Strategic/Cluster Analysis**
- PDF Report
- iFrost Platform
- Strategic Implications
- Strategic Workshop

**Frequency**
- Quarterly
- Annual

![Database Portal Image](Image)
Smart Mobility - City Clustering Matrix
Cities with clear smart mobility vision - 3 clusters based on composition of individual and public transport

Note: Based on analysis from the 2011 Urban Mobility Tracker
Project Milestones – Continuous Delivery and Interaction

INITIATION

Programme Preparation and Project Initiation

Jul 2017

WORKSTREAM 1

PHASE 1
33 city profiles

Nov 2017

PHASE 2
33 city profiles

Feb 2018

PHASE 3
34 city profiles

May 2018

WORKSTREAM 2

City Clustering and Opportunity Analysis

Aug 2018
### Benefits of Joining This Programme

<table>
<thead>
<tr>
<th>Clients are able to understand current mobility situation and the future city plans in the major cities around the world</th>
<th>Identification of <strong>business opportunities</strong> in smart, innovative and sustainable city mobility ecosystem</th>
</tr>
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<tbody>
<tr>
<td><strong>Understand the barriers to investment</strong> that cities and stakeholders experience</td>
<td><strong>The sample plan can be customised</strong> to some extent depending on the clients’ requirements at minimum additional costs.</td>
</tr>
<tr>
<td>Analysis can be made by yourself by using <strong>raw data</strong> in addition to Frost &amp; Sullivan’s analysis.</td>
<td></td>
</tr>
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