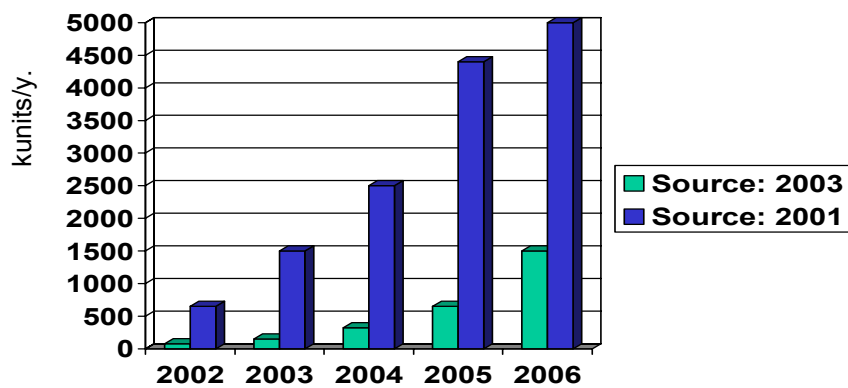


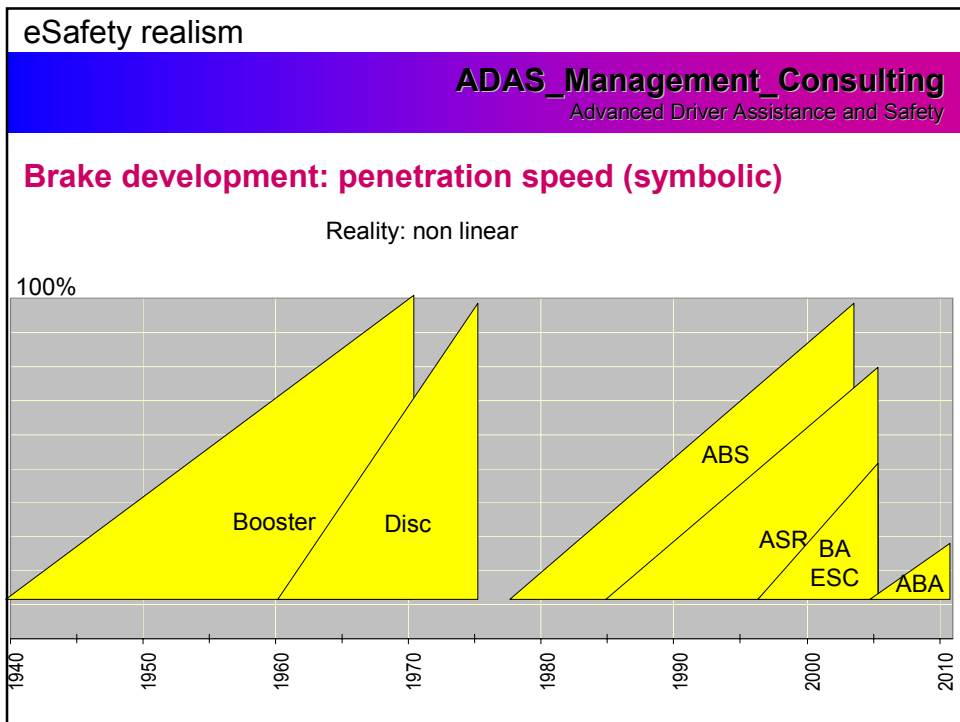
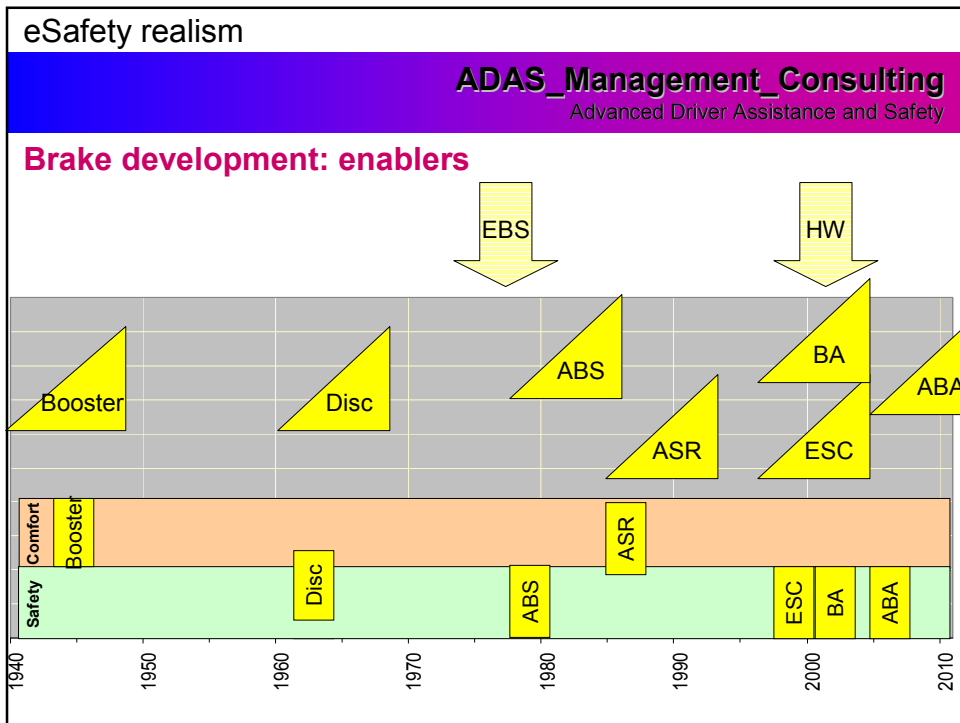
Realism of the future



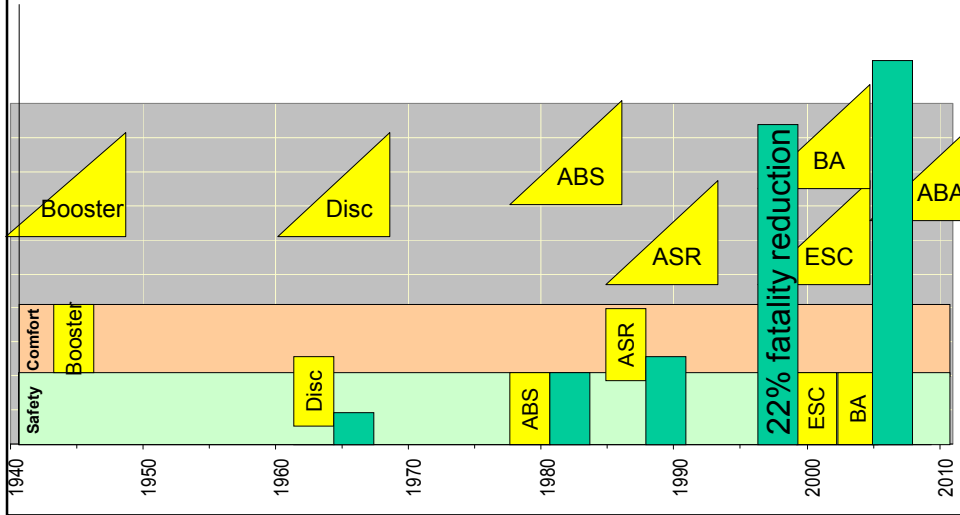
eSafety realism

Market reality – moving hockey stick

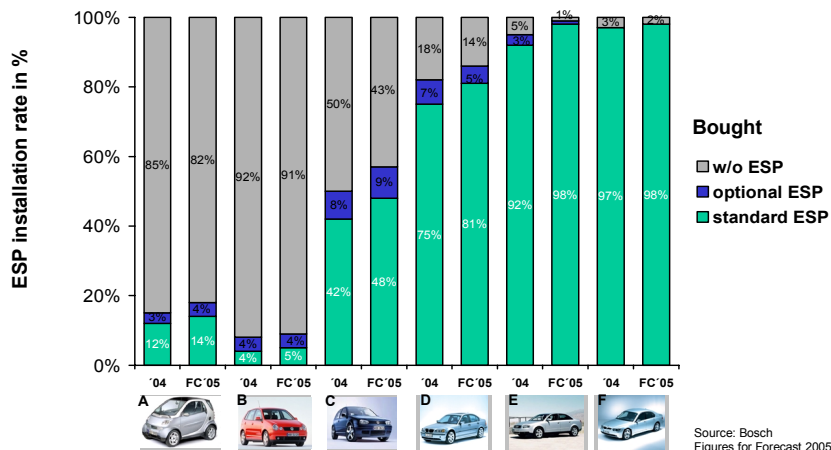




Brake development: Safety potential



ESP Installation 2004 / 2005 by car segment



Forecast volume 2005: 8% 33% 38% 17% 3,5% 0,5%

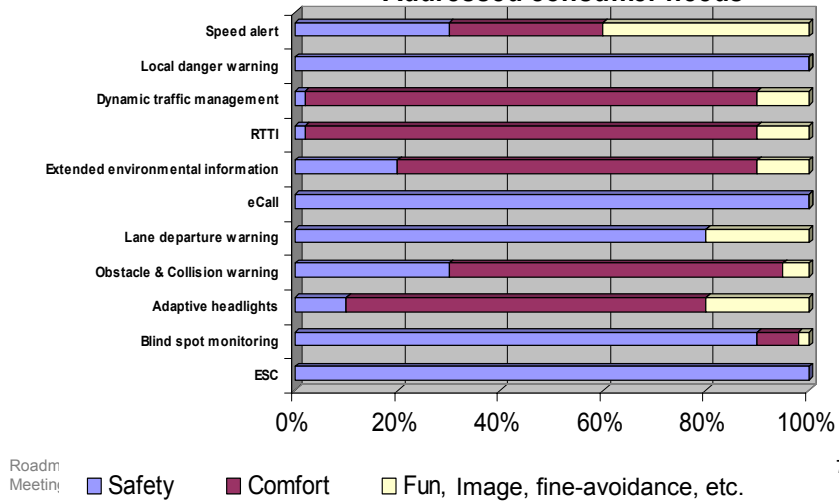
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Source: Bosch Figures for Forecast 2005 based on registrations Jan-Jun 2005

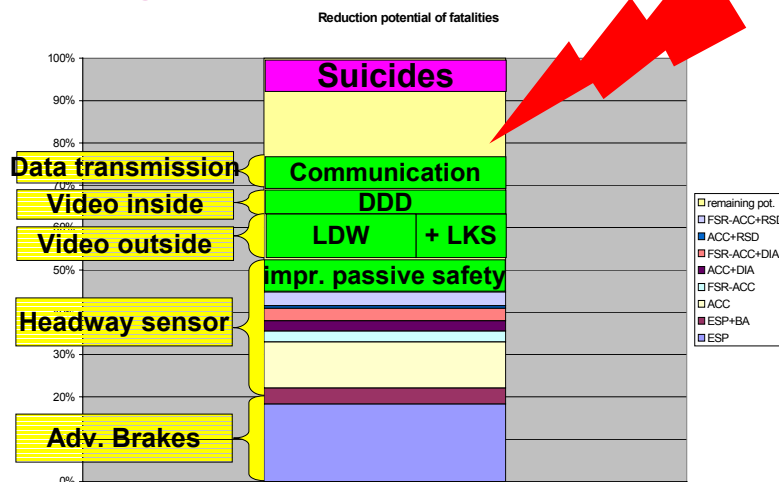
eSafety priority systems

Addressed consumer needs



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Key enabling components

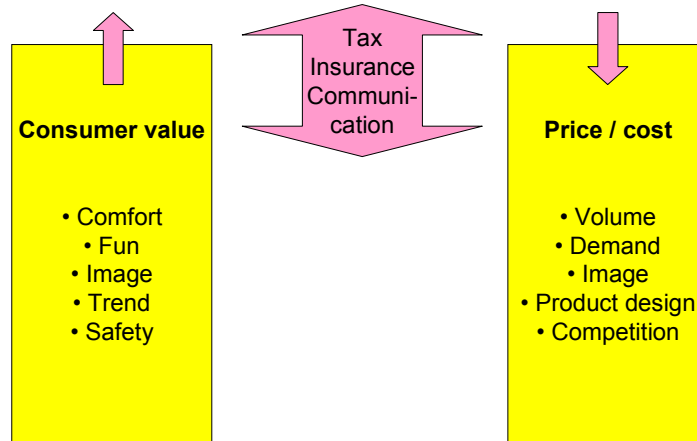


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Market acceleration



Market acceleration

Safety only:

- Awareness about safety problem
- Create market for active safety
- Insurance & tax incentives
- Mandatory equipment

Market acceleration

Everybody who has a good business case, will help to accelerate dissemination of eSafety

- Consumer
- Vehicle dealers
- Vehicle manufacturers
- Insurance companies
- Society

(Trucks, a specific market)

Market acceleration

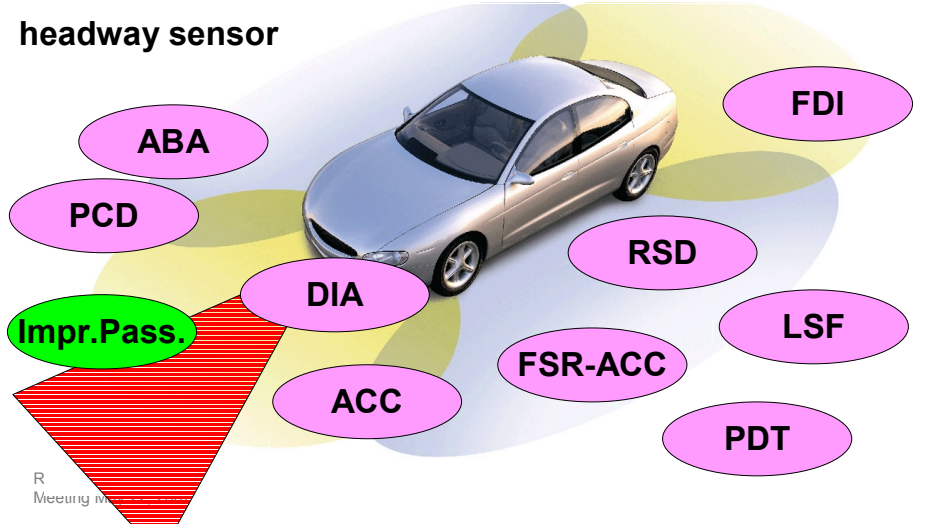
The smartest way:

design high value functions around most promising key enabling components

Example: „headway sensor“

ADAS options – Autonomous systems

headway sensor

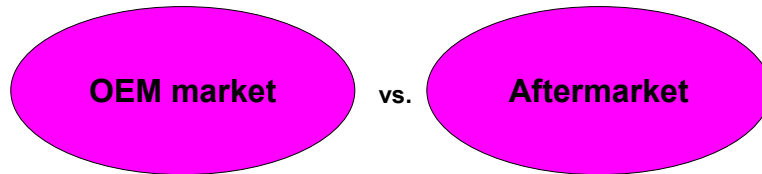


ADAS functions and customer value

Products	Ranking	customer value	costs	Price	Value/price
	OEM				
ACC					0,95
FSR-ACC					1,20
FSR-ACC / TFA / AHC / AFC					1,44
FSR-ACC / RSD / TFA / RSI / AHC / AFC					2,21

Example: headway sensor

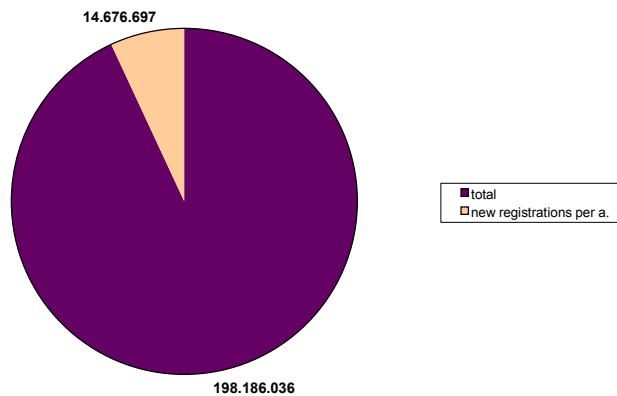
Market acceleration



re.: Example for aftermarket eSafety: www.Mobileye.com AWS

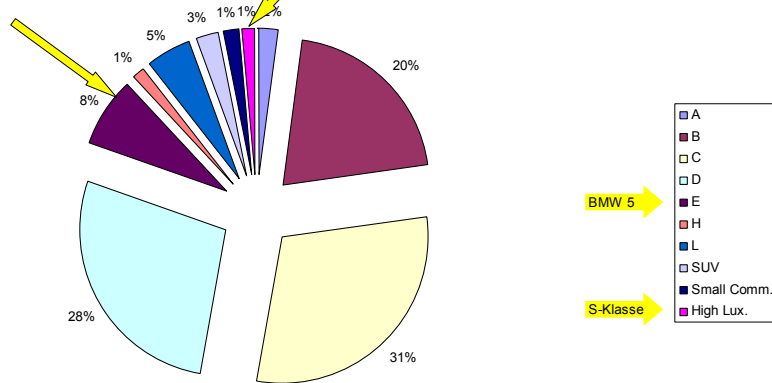
**Market capacity
Aftermarket**

Passenger cars in western Europe



**Market capacity
OEM**

New registrations in Europe per year
by vehicle segments
(14'676'950)



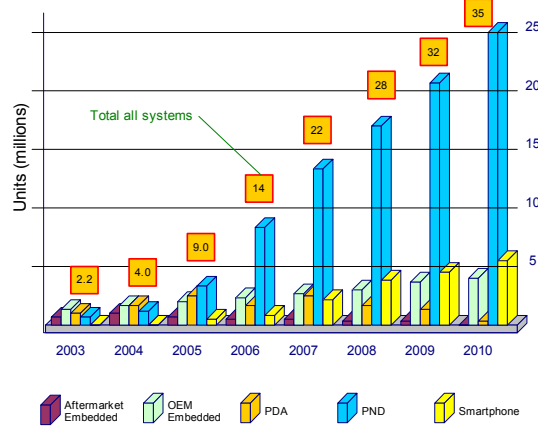
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Market volume - navigation

Market size by product segment (Europe)



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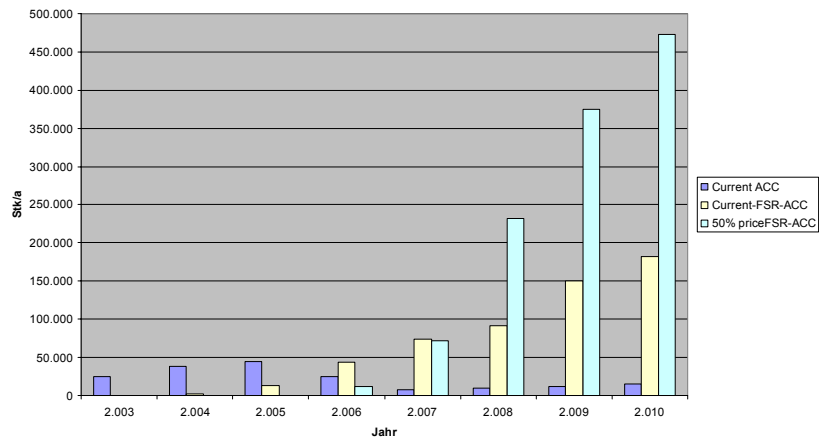
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Sources: SBD; Navteq; GfK

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Market volume – longitudinal functions

Marktvolumen EU

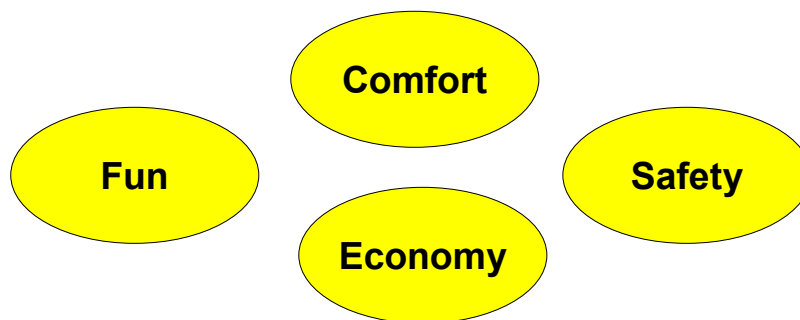


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Product definition & balance



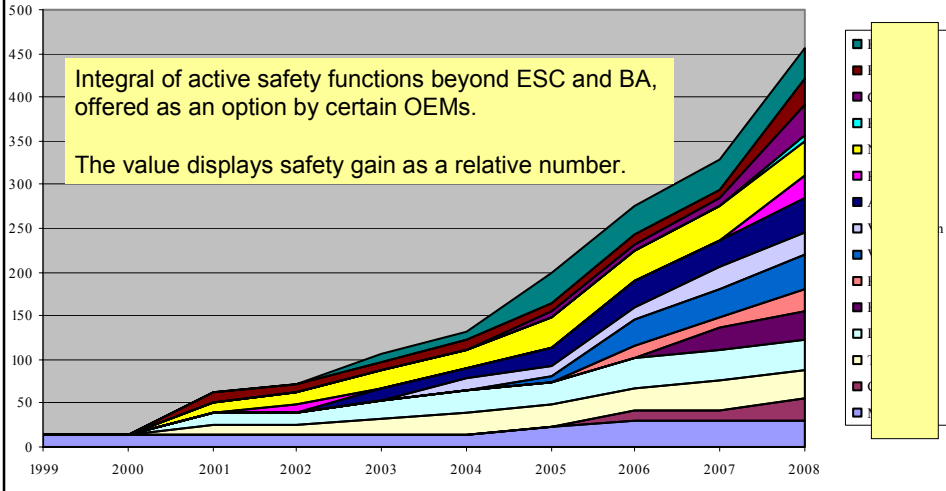
criteria t.b.d.

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Active safety level integral



A joint effort is required

- **Communicate the need for eSafety**
- **Show the benefits of eSafety**
- **Make active safety a competitive factor**
- **Support the business cases (incentives)**
- **Create attractive products**
- **Get aftermarket products supported**

**Thank you
for your
attention**

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