ITU Workshop
March 2005

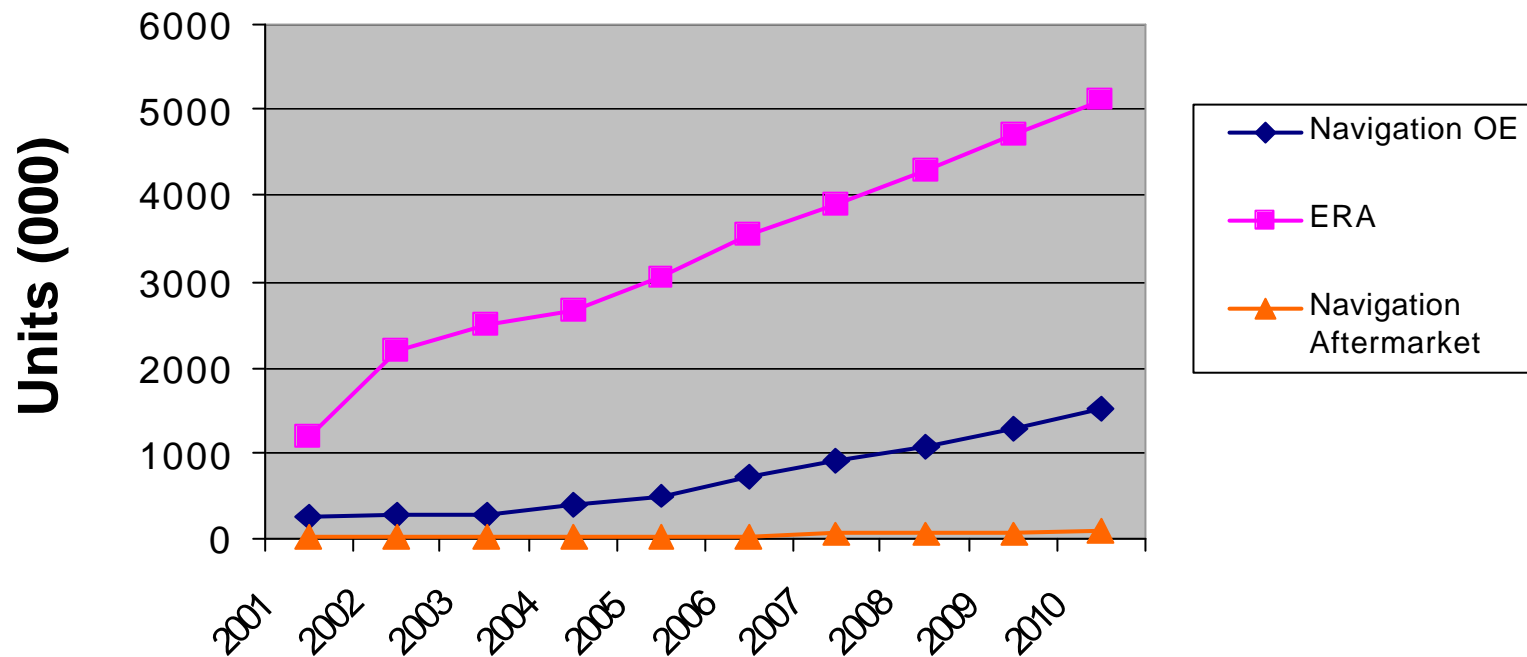# "The Fully Networked Car"

Session 1:
Business Model Discussion

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Chairman ISO TC204

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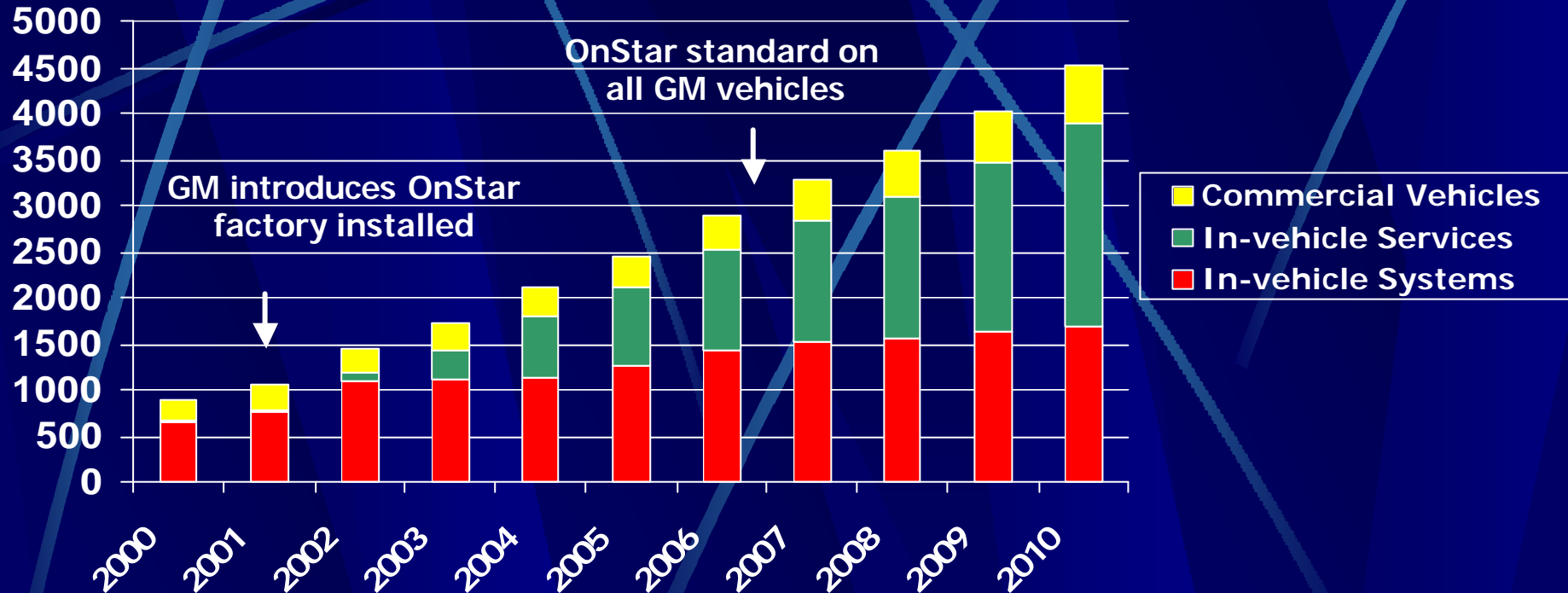# In North America Emergency Response is the Major Market

N. America In-vehicle Telematics Systems Market

- **OnStar** is approaching 3M subscribers
- **ATX** currently at around 500k with MB accounting for 350-400k
- Onboard navigation is still a limited market

North American Telematics Market Revenue

US$ (M)

Chart legend:
- Commercial Vehicles
- In-vehicle Services
- In-vehicle Systems

Annotations on chart:
- GM introduces OnStar factory installed
- OnStar standard on all GM vehicles

Y-axis: 0, 500, 1000, 1500, 2000, 2500, 3000, 3500, 4000, 4500, 5000

X-axis years: 2000, 2001, 2002, 2003, 2004, 2005, 2006, 2007, 2008, 2009, 2010

- Total – includes factory and dealer fitted systems and retail aftermarket
- Telematics Systems – covers in-vehicle embedded GPS based e-Call and b-Call and navigation systems

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Projected Adoption of Bluetooth on Cellular Handsets

Bluetooth Cellular Handset Sales by Region
(% of Total Cellular Handset Sales)

Legend: N America, W Europe, APAC, Worldwide
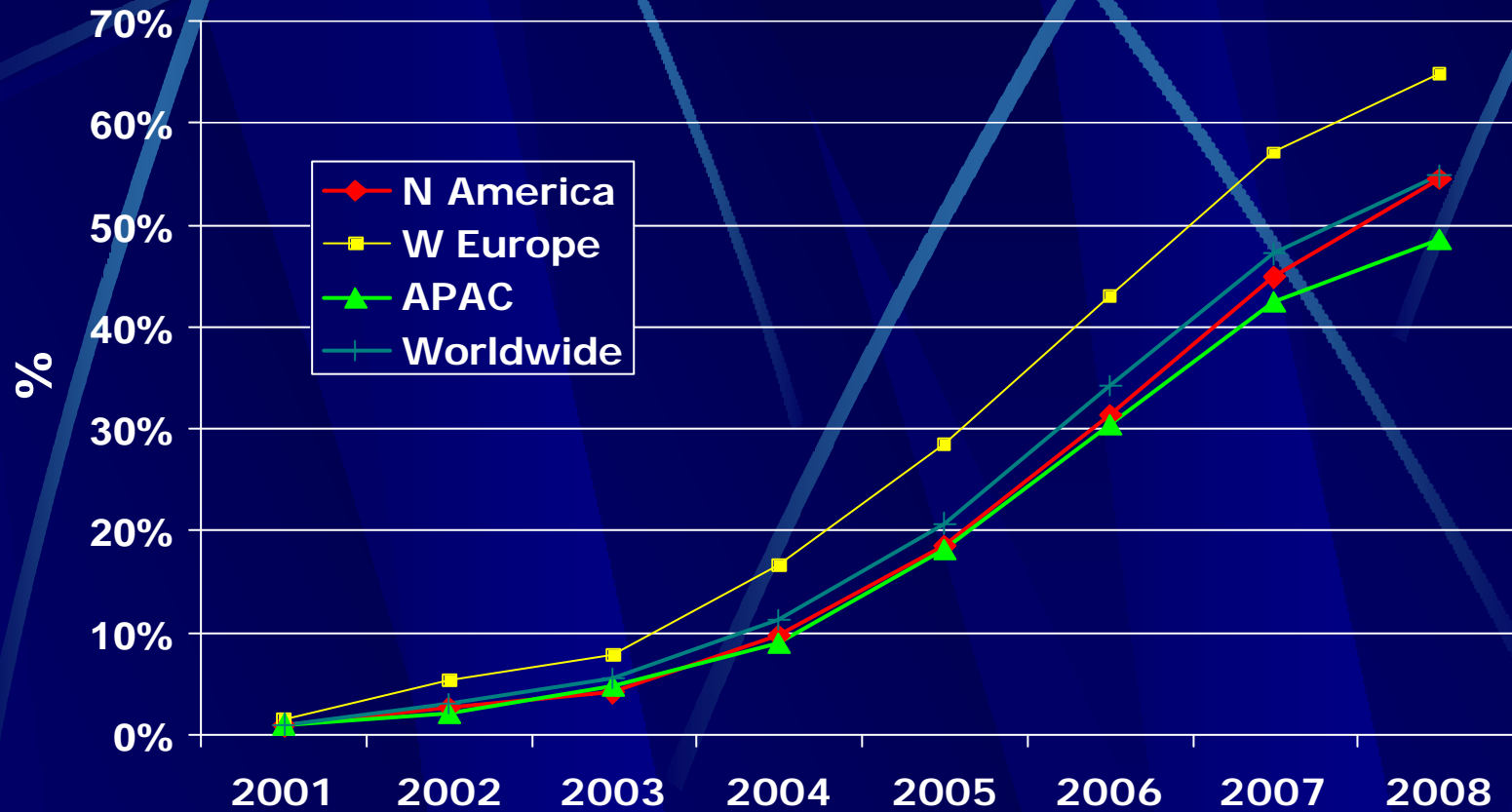
Still Looking for Global Acceptance

- What user-oriented wireless information and entertainment services are consumers actually willing to pay for?
  - Are these *different* in the vehicle vs. at home, at work, etc.?
  - Are these different by region and country?
- Is the payment method part of the problem (subscriptions, up-front, bundled, etc…)?

Separate Voice from Data?

- Would consumers rather bring portable devices into vehicles than have embedded systems in the vehicle?

- Can voice-oriented applications be handled via user's personal communications device?

- Is an embedded data device sufficient for vehicle-specific applications ?

Can Communications be Ubiquitous *and* Affordable?

- Is cellular the only communications option?
- When will new wireless pipelines be ready for safety applications?
  - Who will pay?
  - Who will regulate?
  - Who will manage?
- How can we decouple the vehicle communications life cycle from the life cycle of the vehicle itself?