

Opportunities

1. Increase in Embedded Connectivity Expected

- Europe: Automotive E-call mandate will drive embedded connectivity (15-20M cars from 2015)
- Many Automotive OEMs are looking for value-added solutions: Infotainment content is one of the key focused areas
- Vodafone is in unique position to bundle embedded connectivity solutions for OEMs by working with partners (Music, Insurance, News, Weather, Navigation, Coupons, etc.)



Challenges/Pain Points

1. Connectivity Types: Mobile Tethering vs. Embedded
 - Tethering - “My mobile doesn’t connect to my X-years old car”
 - Embedded - “I’m not paying for it”
2. Business Model: Can we find sweet spot?
 - OEMs wants to enhance driver experience with connectivity to sell cars.
 - Content Partners see connectivity as new revenue source
3. Driver Distraction

