

# Contents

<b>1</b>	<b>Introduction: Mobility in Transition</b>	<b>1</b>
1.1	Mobility Needs and Supply	1
1.1.1	Cars and the Automotive Industry	2
1.1.2	Public Mobility	4
1.1.3	Mobility Services	5
1.2	Strategic Framework	6
<b>2</b>	<b>Mobility Needs</b>	<b>9</b>
2.1	Individual Mobility Needs	9
2.2	Collective Mobility Needs	14
2.2.1	Managing Collective Mobility Needs	15
2.2.2	Meeting Collective Mobility Needs	16
2.3	Shift in the Concept of “The Market”	17
<b>3</b>	<b>Mobility Spaces and Mobility Systems</b>	<b>19</b>
3.1	Geographic and Demographic Context	20
3.1.1	Topography and Climate	20
3.1.2	Spatial Structure	21
3.1.3	Population Size and Density	22
3.2	General Traffic Conditions	23
3.2.1	Roads, Cycle Paths, Footpaths	23
		<b>vii</b>

3.2.2	Parking Areas	24
3.2.3	Traffic Control	24
3.2.4	Mobility Services	25
<b>4</b>	<b>Technological Trends</b>	<b>27</b>
4.1	Electromobility	28
4.1.1	The Return of the Electric Motor	28
4.1.2	Types of Electric Vehicles	31
4.1.3	Core Components of the Electric Drive System	48
4.1.4	Charging	54
4.1.5	Summary: Advantages of Electromobility	75
4.2	Autonomous Driving	81
4.2.1	Technology	82
4.2.2	Autonomous Vehicles	95
4.2.3	Legal Aspects	103
4.2.4	Autonomous Flying	106
4.3	New Vehicle Concepts	109
4.3.1	Classification of Passenger Car Concepts	109
4.3.2	New Criteria for Classification	110
4.4	Digitalization	112
4.4.1	The Five Stages of Digitalization	113
4.4.2	Digitalization Among Vehicle Manufacturers	117
4.4.3	Digitalization in Mobility Services	136
4.4.4	Quality of Data-Based Services	141
4.4.5	Legal Aspects of Data-Based Services	144
4.4.6	Digital Culture: More than Just Full Beards and Sneakers	148
<b>5</b>	<b>Mobility as a Service</b>	<b>161</b>
5.1	The Mobility Classic: The Own Car	161
5.1.1	The Own Car as an End in Itself	161
5.1.2	Alternatives to Owning a Car	162
5.2	Car Sharing: Driving Yourself in a Borrowed Car	164
5.2.1	Offers and Business Models	165
5.2.2	Acceptance of Car Sharing	171

5.2.3	Suitable Vehicle Concepts	176
5.2.4	Two-Wheel Sharing	179
5.3	Ride Sharing Services: Getting Driven Instead of Driving Yourself	191
5.3.1	Offers and Business Models	191
5.3.2	Acceptance of Ride Sharing Services	200
5.3.3	Suitable Vehicle Concepts	206
5.4	Public Mobility	214
5.4.1	What Does “Public” Mean Here?	214
5.4.2	Local Public Transport	216
5.4.3	Long-Distance Public Transport	220
5.4.4	Regional Public Transport Services	221
5.4.5	Business Models	222
5.4.6	Acceptance and Potentials	224
<b>6</b>	<b>Social Trends</b>	229
6.1	Megatrend Sustainability	231
6.1.1	Meaning of Sustainability	231
6.1.2	Sustainable Mobility	233
6.2	Image of Cars in Society	241
6.2.1	Who Wants Which Car?	241
6.2.2	Public Criticism of the Car	246
6.2.3	Traffic Density and Safety	249
6.2.4	Image of the Automotive Industry	252
6.2.5	Giving Back	254
6.3	Social Acceptance of Mobility Services	255
6.4	Regulatory Trends	257
6.4.1	Regulation of Mobility-Related Environmental Pollution	257
6.4.2	Regulation of the Car Population	264
6.4.3	Financial Support	266
<b>7</b>	<b>Looking Ahead</b>	271
7.1	There Is No Turning Back	272
7.2	Focus of the Change	273

7.2.1	Reducing Mobility Needs	274
7.2.2	Consistent Continuation of Electromobility	275
7.2.3	Expansion of the Charging Infrastructure	277
7.2.4	Fewer Private Cars	278
7.2.5	Fewer Cars on the Roads	279
7.2.6	Growing Importance of Social Sustainability	281
7.3	Five Growth Areas: Where Is the Upward Trend?	282