



FROST & SULLIVAN

GROWTH ADVISORY SOLUTIONS

Mobility & Transportation

Value Proposition &
Capability

2025



www.frost.com

*The Growth Pipeline™ Company
Powering clients to a future shaped by growth*



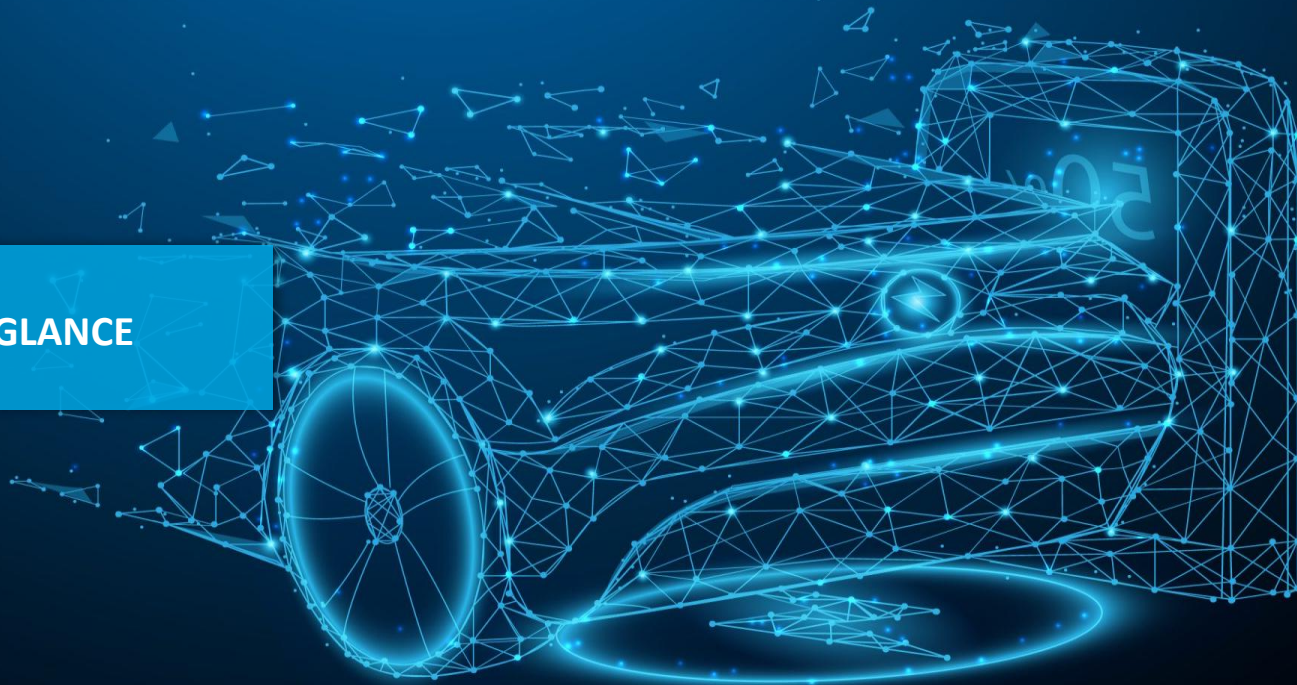
AGENDA

**Frost & Sullivan's Mobility Advisory
Capabilities**

**Frost & Sullivan's Mobility Research
Capabilities**



FROST & SULLIVAN AT A GLANCE



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FROST & SULLIVAN – WHO WE ARE

A **leading research and advisory firm** with 40+ offices in **30 countries**, who has partnered with corporations, cities, governments, and investor communities over the past 60 years to **identify, prioritize, and execute opportunities that power clients toward a future shaped by growth.**

60+ Years of Research & Advisory Experience

3-Tiered Growth System

1. Generate
2. Evaluate
3. Implement



Global Coverage
40+ Offices
Around the World
Advisory force on the field

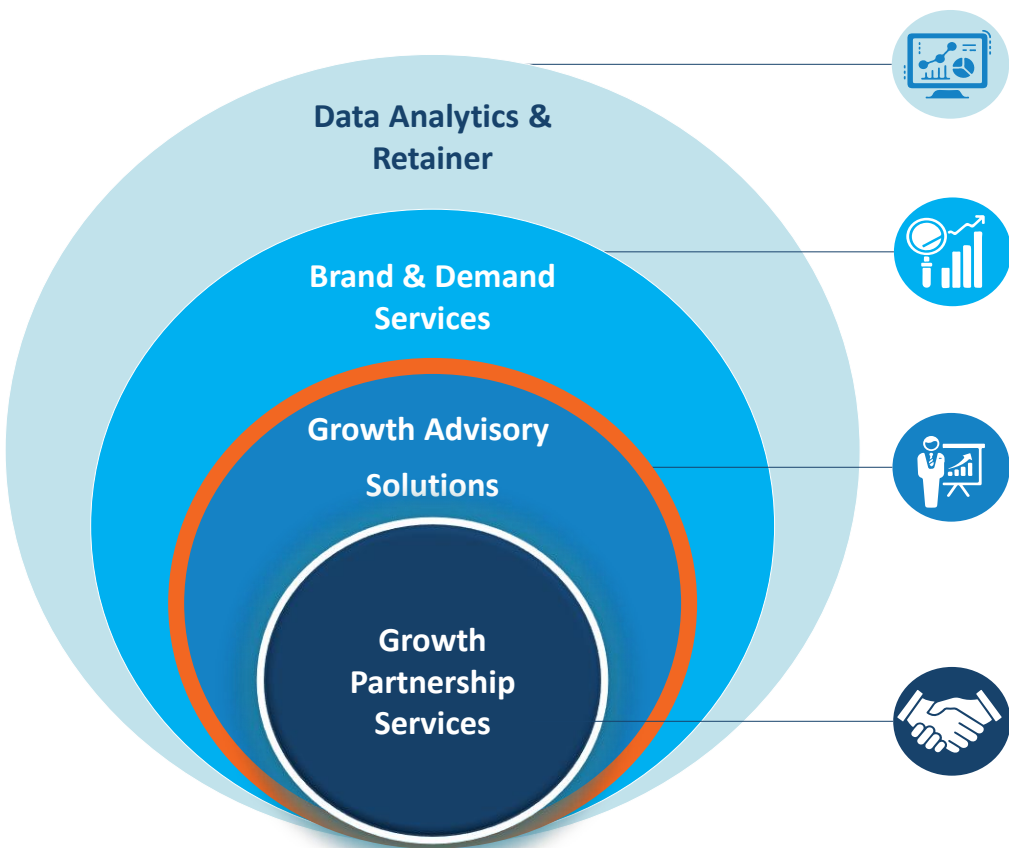
360° Market Coverage to identify growth opportunities across multiple topics areas

In-House Market Engineering & Intelligence combined with **Strategy Consulting** and **Be-Spoke Advisory Solutions.**

Trusted Partner for 16,000+ Clients Worldwide
 (Consolidated relationships with C-levels and decision-makers across industries)

FROST & SULLIVAN – OUR VALUE PROPOSITION

To be your most valued global growth partner, leveraging our unique team’s combined industry and client advisory experience & solution approach



Data Intelligence (Add-on Annual Package – Data Platform)

Growth Generator	Retainer Services for ad-hoc requests
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Marketing Activation (Promote in Studies, Invite As Guest Speaker..)

Whitepapers & Virtual Think Tanks	Account-based Marketing	Demand Generation
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Growth Advisory (Bespoke Consulting Projects)

Foresight & TechCasting	Strategic Planning & Benchmarking	Market Strategies	IPO and/or Investor Support
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Growth Analytics (Annual Subscription Services)

Fact-based Market Reports	Business Model, Technology & Market Trends	Actionable Insights	Analyst Interaction, 24x7x365 online
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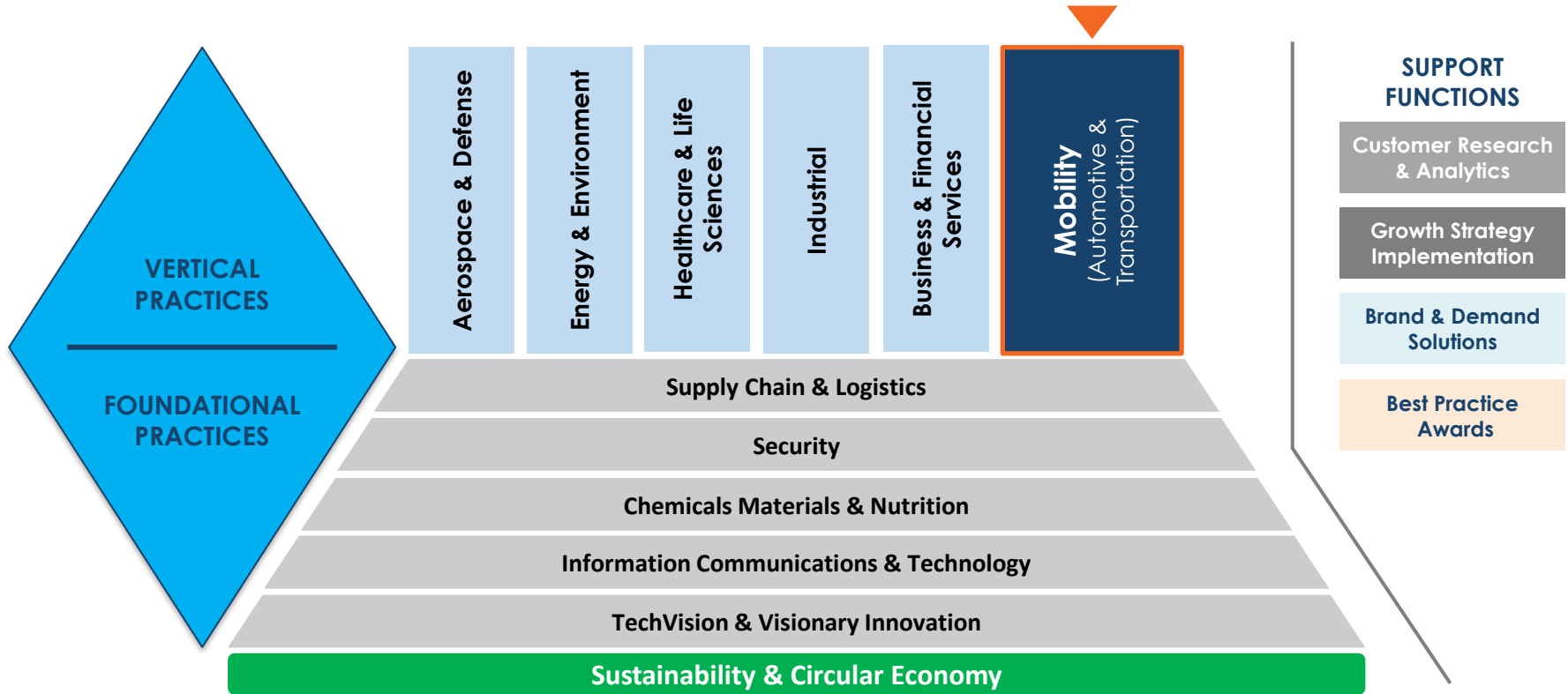
WHY FROST & SULLIVAN: GROWTH PIPELINE ENGINE™

A proven framework to power your growth – engagement focus on opportunity universe

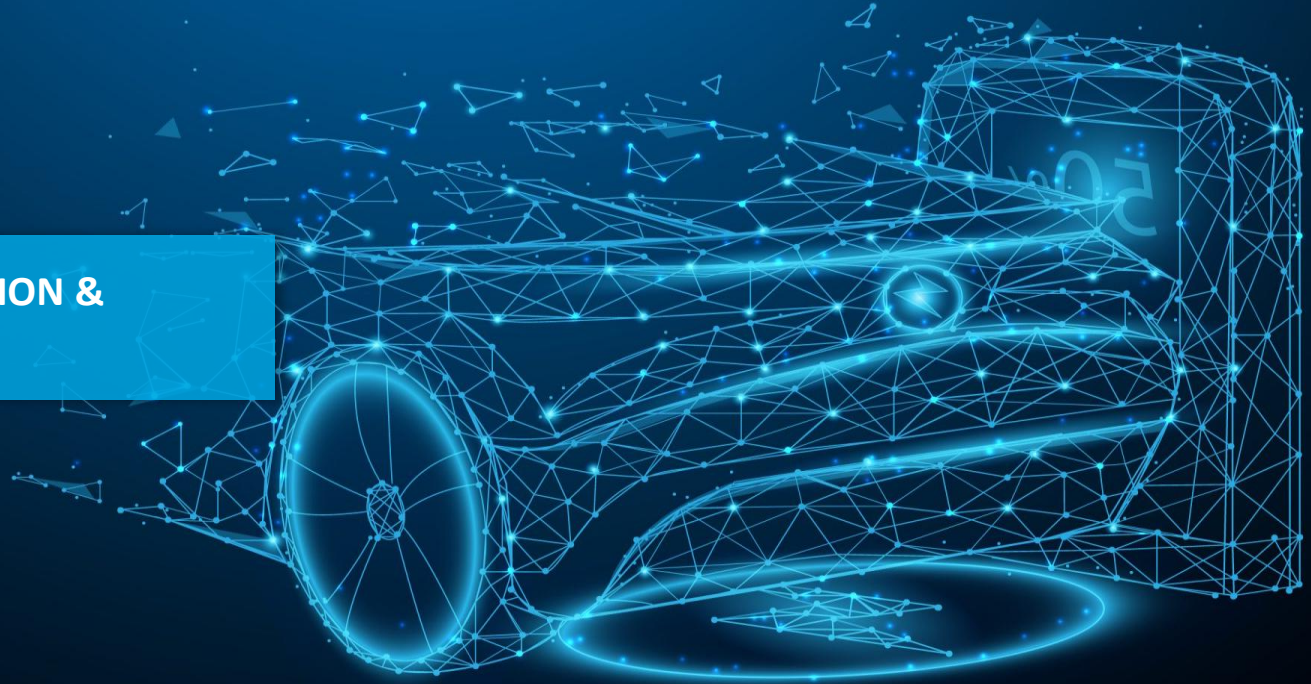


FROST & SULLIVAN INDUSTRY COVERAGE

We keep working within and across our verticals to **converging** our global expertise to deliver **aggregated value** for our clients



**MOBILITY PRACTICE – VISION &
CAPABILITY**



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MOBILITY & TRANSPORTATION PRACTICE – 360° COVERAGE & INSIDER EXPERTISE

Deep expertise across all types of vehicles and new mobility devices



ON-GROUND TEAMS:

+ 200 Automotive Experts
across 30 countries with specific
industry background



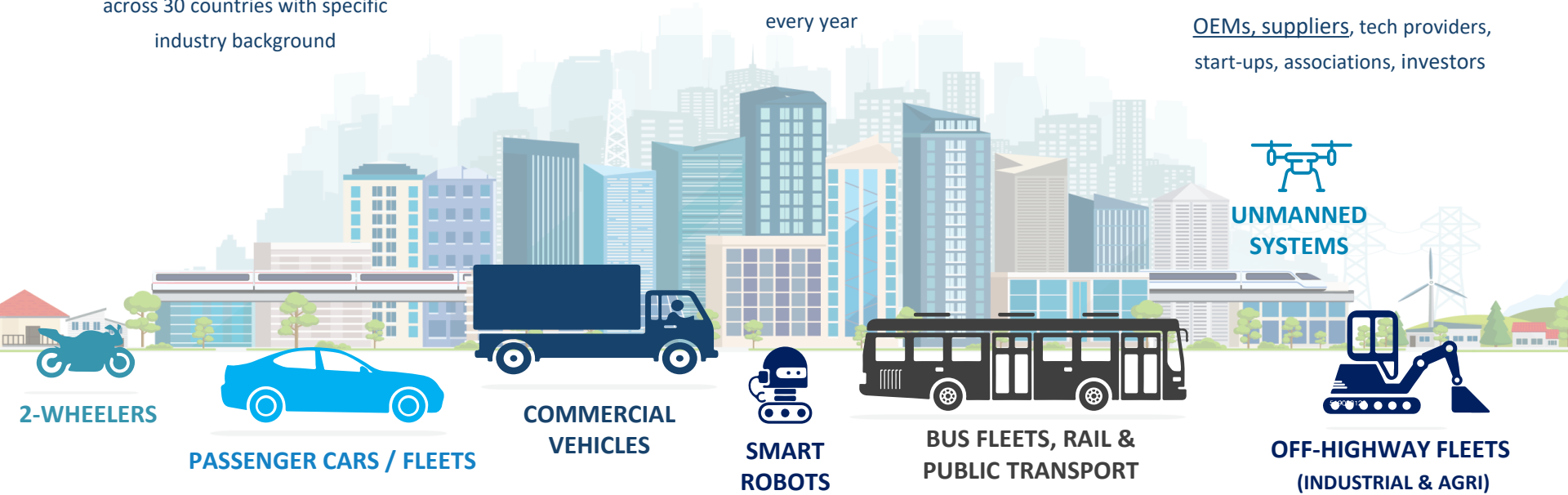
HALF A MILLION WORTH OF NEW CONTENT:

+ 150 new research topics
every year



EXTENSIVE CLIENT BASE ACROSS ENTIRE VALUE-CHAIN:

OEMs, suppliers, tech providers,
start-ups, associations, investors



UNMANNED SYSTEMS



OFF-HIGHWAY FLEETS (INDUSTRIAL & AGRI)

MOBILITY ADVISORY USP – OUR 6 VERTICAL PILLARS

Mobility program offers a **complete 360 degree analysis of the automotive & transportation market** with a focus on medium to long term strategic options tailored accordingly to stakeholder type



OUR CUSTOMERS – INCLUDE OEMs, SUPPLIERS, TECH AND MOBILITY SERVICE PROVIDERS



This is a selective list of customers

MOBILITY PATH TO GROWTH – ADVISORY CAPABILITY ACROSS VALUE GENERATION CYCLE

From the field thought leadership across mobility & transportation ecosystem integrated through an **end-to-end engagement offering**.



Note: Non exhaustive list, based on recently delivered projects and running initiatives.

CLIENT TESTIMONIALS

What client wants to say

Global Automotive Equipment Supplier

“The project was ambitious, challenging and dense. Output and recommendations received will be **very useful for our decision making and driving our Automotive division strategy**. Overall, a great proof of a partnership and engagement.”

Global Automotive OEM

F&S deliverables has helped us clarify and prioritize our target markets and customer segments , both critical elements in implementing our roll out schedule and building a scalable business. It is also proving to be very helpful in communicating the unique attraction of our business model to potential investors

Global Energy Solutions Provider

Despite tight timelines and at times limited input, the F&S team is very strong at delivering against agreed milestones and **generating valuable insights for our top management**. Due to F&S’s comprehensive experience in the automotive industry (and beyond) project was **efficient, streamlined and enjoyable**”

European Marine Engine Manufacturer

“Engagement team ensured smooth and efficient communication, delivering a powerful interactive quantitative dataset and qualitative insights to **understand market potential and support our industrial plan definition.**”

Global Oil & Gas Company

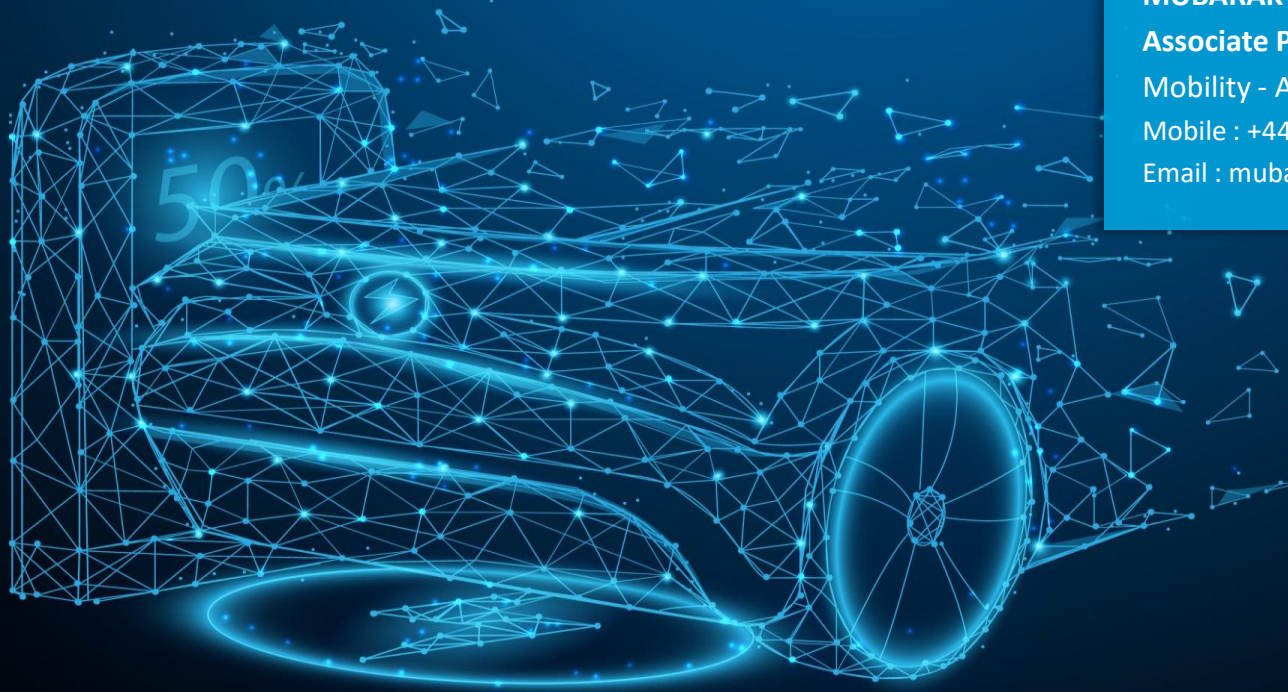
“Working with the F&S team has been key to not only ensuring we understand the current sector position as of today, but also for clearly **positioning the short / mid / longer term industry trends** with respect to government legislation, key market developments, market leading OEM and **prospect strategies**. This work has therefore helped to clearly identify both the **risks and opportunities** for our business with regards to off-highway low-emission / decarbonization developments.”

Leading Mobility Solutions Provider

“F&S Team have been able to help us **identify and quantify the growth opportunities** with clear pillars that are easy to roll out and **generate value** with learnings from other industries to create a sustainable model. The team has been able to be practical keeping the balance between short- and long-term value and strategy which helped us to **build a clear strategy** and plan that has **significant potential**, now and in the future”.



This is a selective list of European projects with average client satisfaction score between 8-10. Source: Client quality surveys



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