



Urban Mobility

Zero tailpipe
emissions led



Typically Low Power



High Volume Compact Passenger Car



Small Urban BEVs

Long Range Mobility

Net-zero* emissions led



Typically Medium Power



< 3.5t Vans



High Volume Passenger Car

High Power and Performance

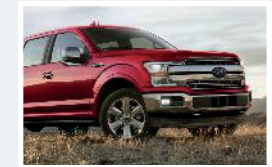
Net-zero* emissions led



Typically High Power



High Performance



High Power SUV / Pick-up

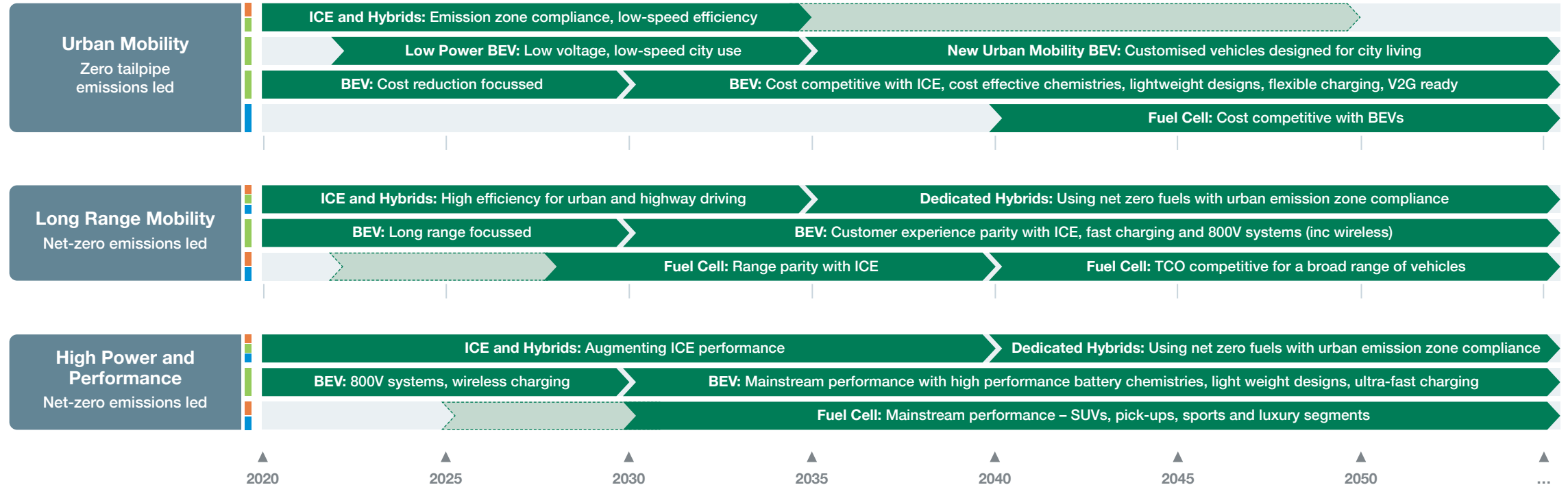
***Net-zero:** The activities within the value chain of a company result in no net impact on the climate from greenhouse gas emissions.
This can be achieved by balancing the impact of any remaining greenhouse gas emissions with an appropriate amount of carbon removals.



This roadmap represents a snapshot-in-time view of the global automotive industry propulsion technology forecast for mass market adoption. Specific application-tailored technologies will vary from region to region.

Solid colour bar:
Technology adoption for mass-market applications

Dotted line bar:
Technology exists in international markets, but less prevalent in Europe

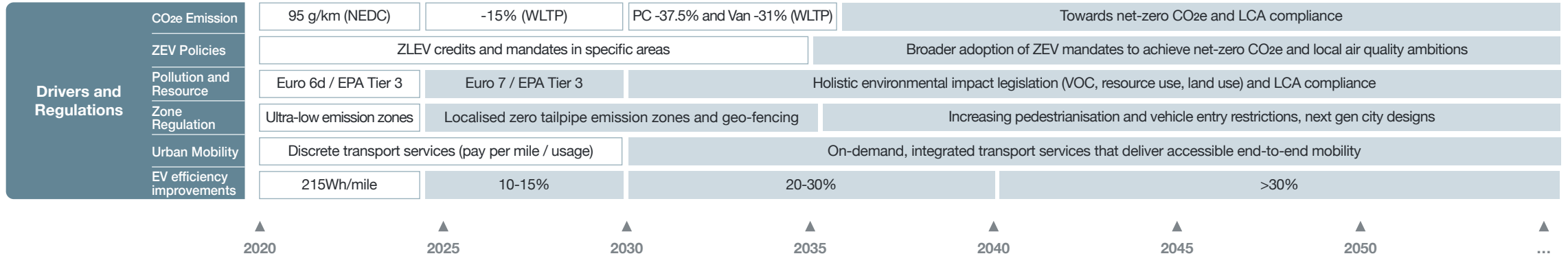


<div>Energy Source</div> <div>Mature for widespread adoption</div>	ICE fuels	Blended fuels moving to low carbon fuels (including gaseous fuels)		Net-zero compliant fuels, sufficient supply at low cost		
	Electricity	Increasing renewable electricity supply		Ubiquitous renewable green electricity supply		
	Hydrogen	Sufficient (blue and green) hydrogen supply to support automotive applications		Green hydrogen, sufficient supply at low cost		
Drivers and Regulations		Policy, environmental, social and economic drivers that exert influence on vehicle design and powertrain choices				→
Technology Enablers		Engineering and technology enablers that exert influence on vehicle design and powertrain choices				Further details on page 3

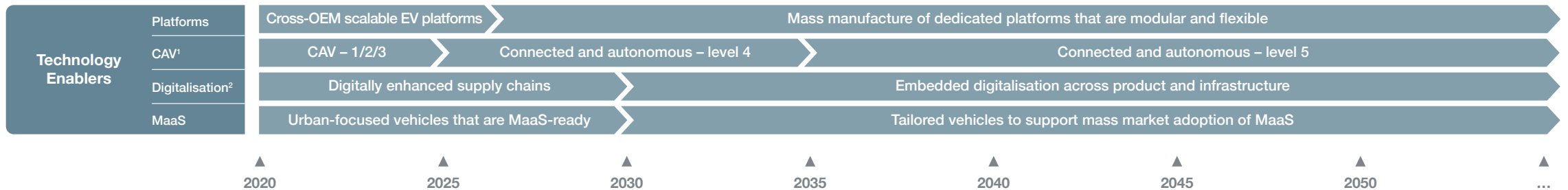
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Further details
on page 3



Policy, environmental, social and economic drivers that exert influence on vehicle designs and powertrains

 Defined driver
 Predicted driver


Engineering and technology enablers that exert influence on vehicle designs and powertrains

 Technology adoption for mass-market applications
1. Adoption is dependent on supporting roadside infrastructure (incl. V2X, digital networks, data protocols, interconnects). See further details on <https://zenzic.io/roadmap/>

2. More details on digitalisation will be available on the IDE roadmap from March 2021