

### Session #14: Potential Impacts of Connected/Automation Technology in Transportation

November 18, 2020







https://www.sustainablefleetexpo.com/





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### **Next Series Dates & Topics:**

**November 10:** Sustainable Fleet Analytical Tools & Information

November 18: Potential Impacts of

Connectivity/Automation Technology

**December 02:** Idle Reduction an Easy Win

**December 09:** The Green Garage Winners 2020





# Format

- Q&A at the end
- Submit questions and comments to "Panelists"
- Scheduled for 2:00p-3:30p
- Handout
- Recording





#### **NC STATE** UNIVERSITY



Rick Sapienza resapienza@ncsu.edu Phone: 919-515-2788



- Clean Transportation Program Director NC Clean Energy Technology Center at NC State University
- 8 years with NC State
- 30+ years experience including General Motors, Draper Lab and Great Lakes Pulp & Fibre in both engineering and business management roles



### Potential Impacts of Connected/Automation Technology in Transportation November 18, 2020

2:00-2:05 Rick Sapienza, NCCETC--Welcome & Introduction
2:05-2:25 Dr. Josh Siegel, Michigan State University—Overview of CA & Applications
2:25-2:30 Sunjay Dodani, Revvo—Tire Safety Technology
2:30-2:35 Jonathan Ford, City of Orlando—Revvo Deployment Story
2:35-2:47 Andrew Wolpert, Smart Columbus—Autonomous Shuttle Service Deployment
2:47-2:55 Sass Peress, iSun—Solar Charging Solution
3:55-3:10 Derrick Redding, Automotive Technology Consulting—Connected/Automation
Technology Safety & Solutions in Transportation
3:10-3:30 Q&A







### (Applications of) Connected and Automated Vehicles

Josh Siegel, Ph.D.



### I run MSU's "DeepTech" Lab and work with AI and IoT



SULL

### Assistant Professor, Michigan State CSE

Courtesy appointment, ECE

– Research:

- Ubiquitous Connectivity secure, efficient, and scalable IoT using contextual AI
- **Pervasive Sensing** and **Universal Diagnostics** making actionable "data exhaust" across transportation, manufacturing, appliances, utilities, and health
- Enhanced Automation defensive and resilient self-driving algorithms
- Teaching:
  - Advanced Topics in Automated Vehicles
  - Entrepreneurship and the Internet of Things



Lead Instructor, MIT "DeepTech" and "IoT" Bootcamps

Josh Siegel



Short-Term Lecturer, MIT Sloan "Implementing Industry 4.0"



Former Research Scientist, MIT

- S.B., S.M., Ph.D. from MIT Mechanical Engineering



### This talk introduces connectivity and automation in vehicles

- Cars as computers
- Connectivity to generate data and optimize at scale
- Applications for connectivity
- Introduction to automated vehicles and degrees of autonomy
- Applications for automation in fleets today and tomorrow
- Challenges in technology implementation

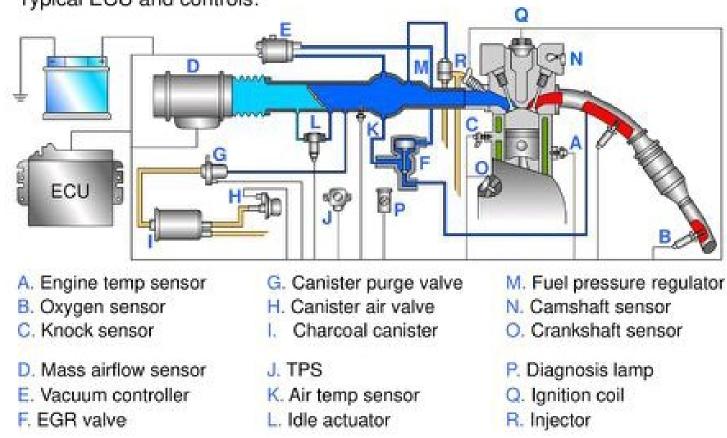


### Modern vehicles are computers on wheels



Sensors inform task-specific electronic control units (ECUs)

### Simplified ECU Control System

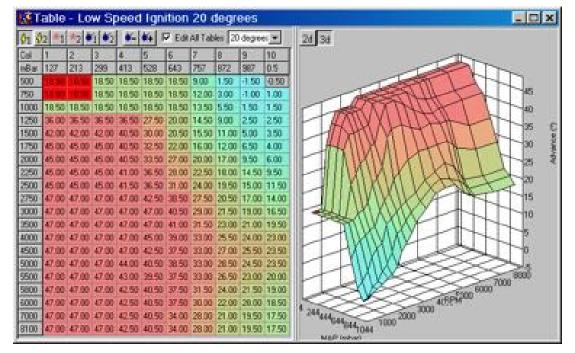


Typical ECU and controls:

DeepTechLab

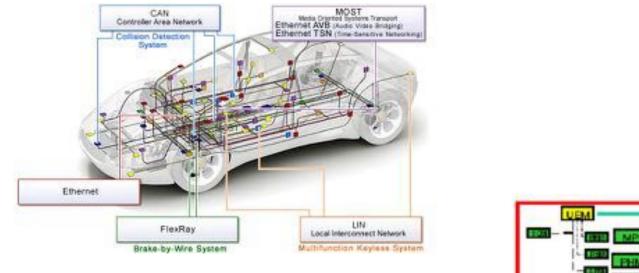
### The purpose of ECUs is to capture, filter, and act upon signals

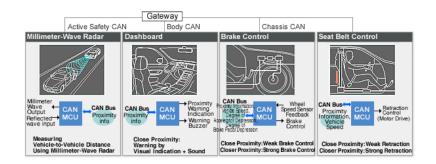
- ECUs capture data, condition and filter signals, and transform information into insight to respond appropriately to changing conditions or environments
- Example: Engine Control Unit A/F Map
  - These systems match operating conditions with air/fuel ratio tables to ensure safe, efficient, reliable and high-performance operation

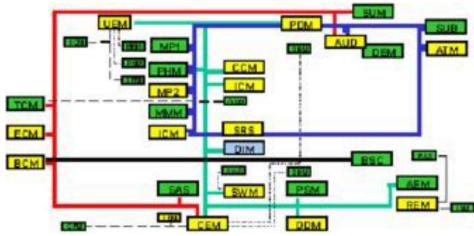


ECUs may be self-contained computing elements controlling one subsystem, but **typically share raw or aggregate data** for vehicle-wide diagnostics and optimization

### ECU networks generate 25GB/hour or more







Networks develop as a means of sharing critical information across diverse systems; some may be intentionally divided to ensure security, protect bandwidth from saturating, and to meet hard real-time (deterministic processing) constraints



To share data, vehicles increasingly form large networks



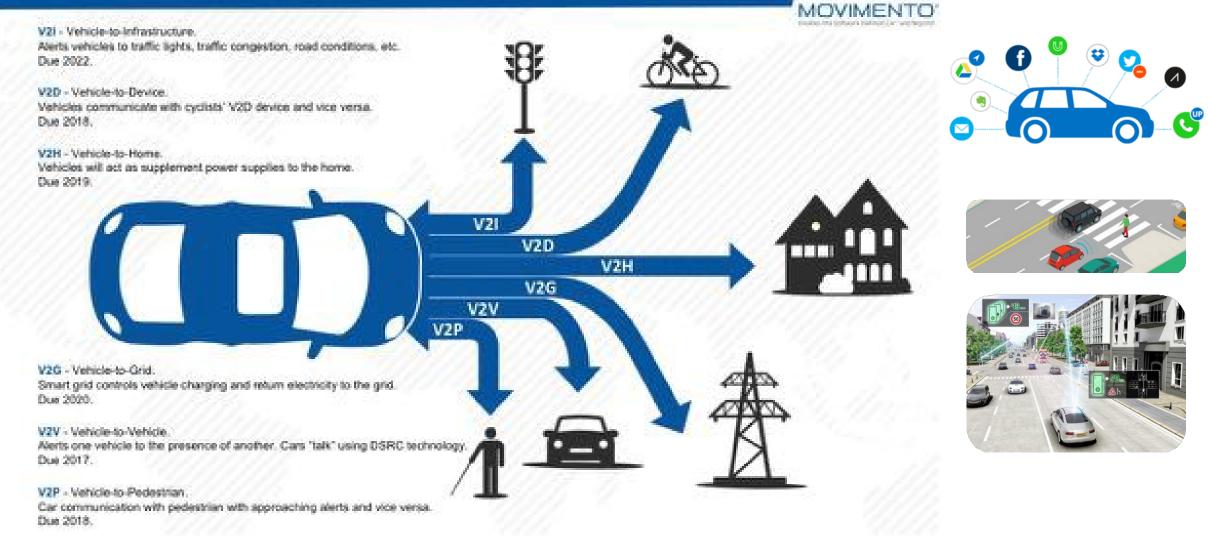
Transportation is evolving and vehicles are just another element of the Internet of Things



# Extravehicular connectivity generates massive-scale data



### Wide-area networks enable diverse communication modalities





External networks support multiple communication topologies termed "vehicle to X," or "V2X"



Slide from Junyi Li, "IoT: a 5G perspective," LIDS Smart Urban Infrastructures Workshop

### There are three primary extra-vehicular networks

- Cellular (almost every car sold now has a SIM)
  - 3G, 4G, 5G
  - 2G sunset in the US and Europe but pervasive in developing world
- Bluetooth
  - Pairs to mobile device to share media, but also to "piggyback" on existing, consumer-paid data connection

### • Dedicated Short Range Communication (DSRC)

- Designed specifically for transportation
- Includes cars, infrastructure

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TOPICS -	WRITERS +	PODCASTS	EVENTS
MONILE TESLA T	ANSPORTATION		

#### Why Your Next Car Is Likely to Have Its Own Cell Service

Emergencies, autonomous vehicles and over-the-air software updates are all reasons why vehicles are getting their own cellular connections.

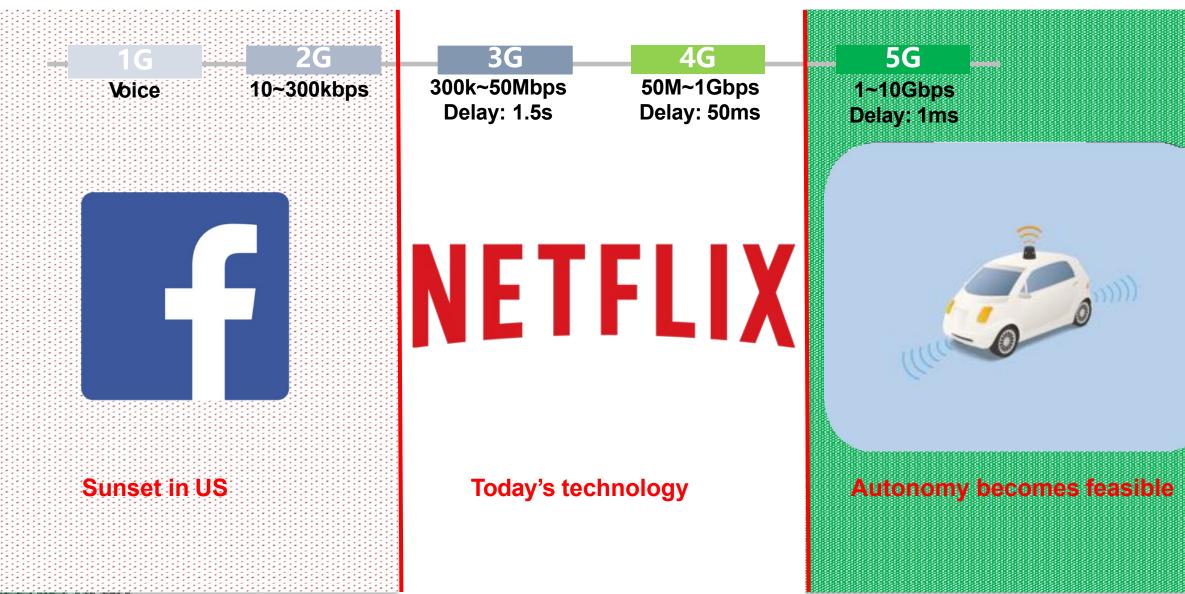
By Ina Fried | disafiled | Jan 19, 2016; 11:17an EST



Cars are likely to have their own wireless connections in the pext few years, but given the fact that most people already have



### Each cell generation supports different capabilities



### Bluetooth is commonly-used for short-range communication

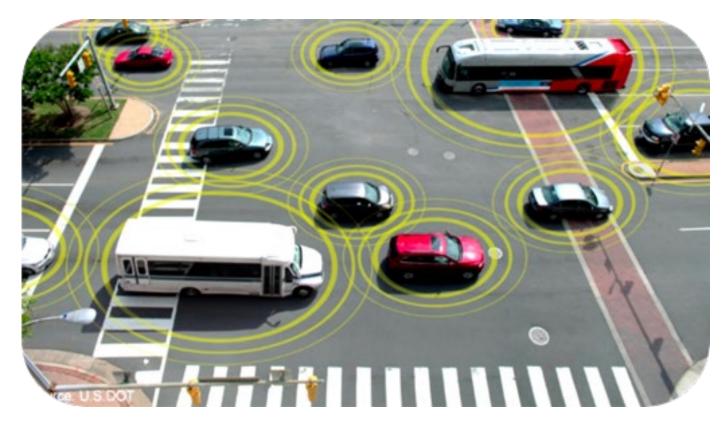


Problems with Bluetooth include difficulty to pairing, forgotten mobile devices, and dead batteries But, some manufacturers use the drivers' phone to bring Bluetooth data to the Cloud (for free!)



# **DSRC is designed to meet transportation's needs** for flexible, fast networking

- Short range (< 300m)</p>
- Low latency (10Hz, ~10ms delay)
- Subscriptionless (free, no SIM)
- Standardized for vehicles and infrastructure





# Vehicle data today are used in a variety of applications



### **Connected vehicles** generally use data three ways

Data-informed **operations**, improving efficiency and performance in real-time

Data-informed **diagnostics**, prognostics and maintenance needs

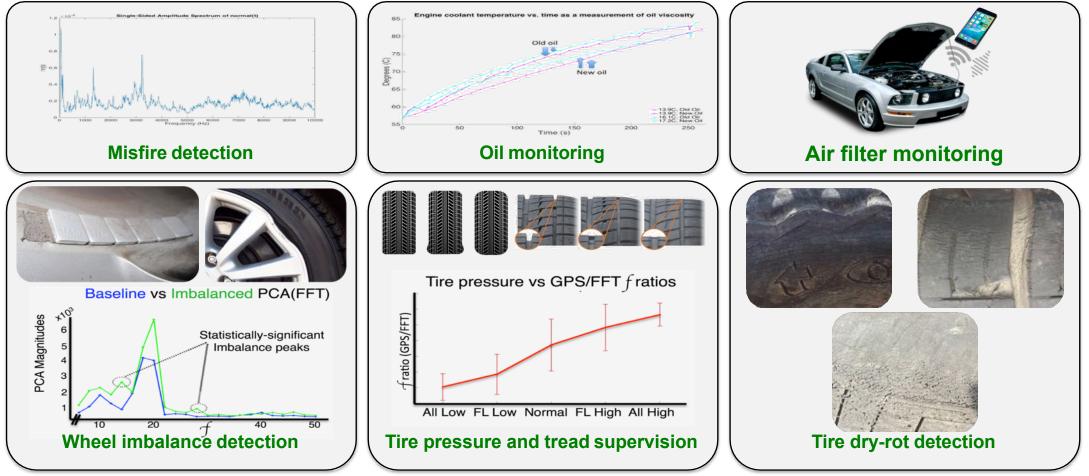
> **Readied** (data as a design tool)

Reactive (data for analytics)

**Responsive** (data as a service)



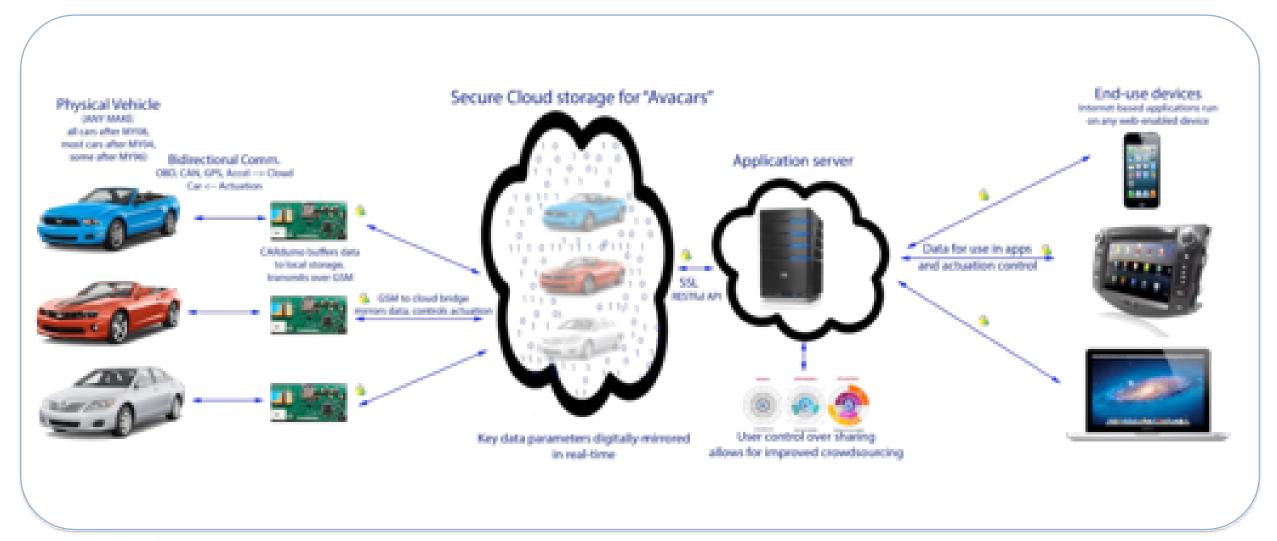
# My own work uses connectivity to diagnose **common, costly failures using low-cost sensors**



[In ECML-PKDD 2016, IEEE Sensors 2014, EAAI Journal, ASME DSCC 2016, SAI IntelliSys 2016 and AIMS 2018]

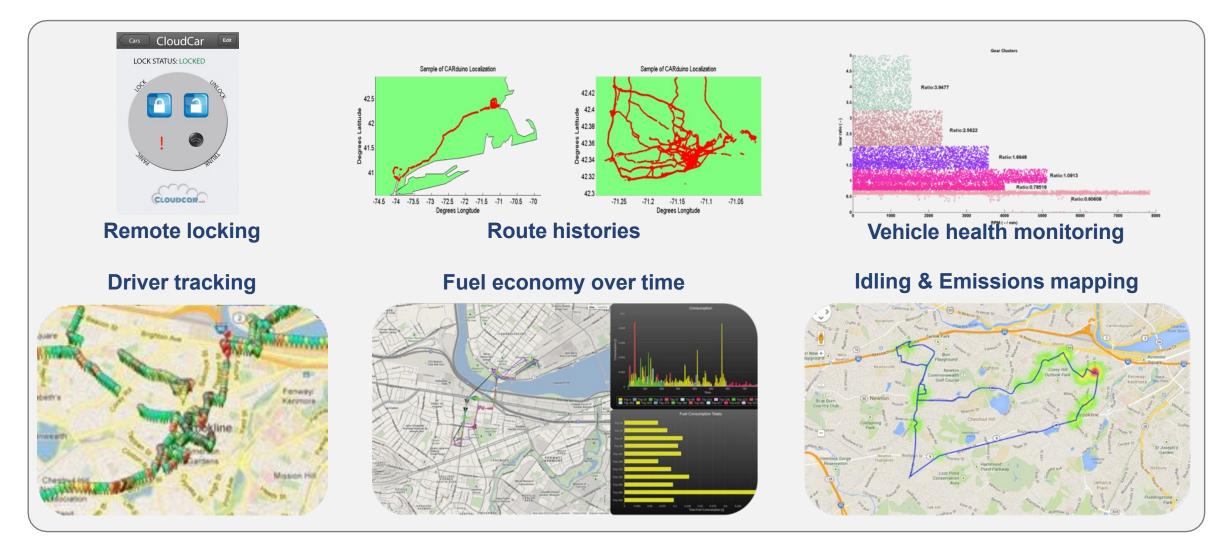


### Application platforms may enable networked features



### DeepTechLab

### Connectivity supports remote access and vehicle control





### Connected data illuminate the road ahead



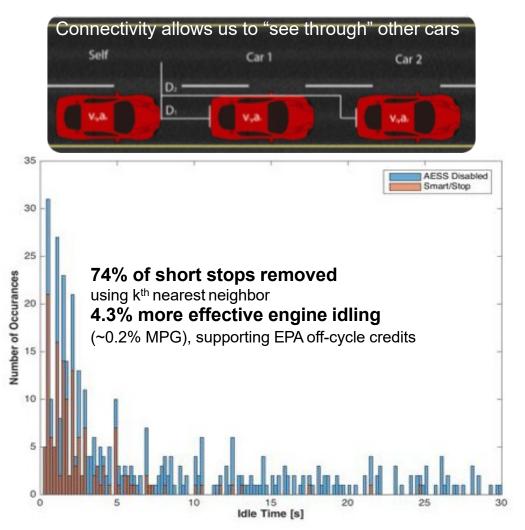
[https://jalopnik.com/the-mclaren-gts-suspension-predicts-the-future-to-give-1838107298] [https://arstechnica.com/cars/2019/07/the-lincoln-aviator-uses-cameras-to-read-the-road-smooth-out-big-potholes/] [https://<u>www.repairerdrivennews.com/2015/06/11/jaguar-land-rover-testing-out-pothole-detecting-camera-sensor-tech/</u>]



### V2V can even reduce idle fuel consumption

- Connectivity allows vehicles to observe and adapt to their environments in realtime
  - While in traffic, you look at truck a few cars ahead to anticipate when you'll move
  - Connectivity provides cars similar **context data** on which to act
- We trained cars to "look ahead," and eliminated
   74% of annoying and wasteful short idle events

Field Intelligence La



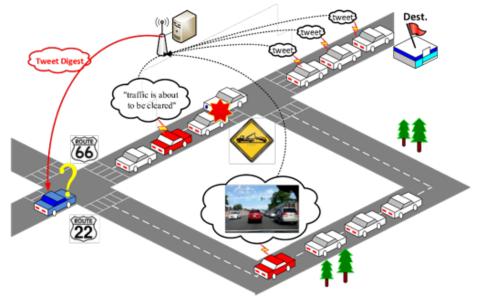
Erb, Dylan Charles. Optimizing hybrid vehicles: battery pack design, energy management, and collaborative learning. Diss. Massachusetts Institute of Technology, 2016. J. Siegel, D. Erb, S. Sarma, "Automotive Application Locality: The 'When' and 'Where' of Connected Vehicle Applications, as Applied to Idle Time Prediction." To appear in IEEE Transactions on Intelligent Transportation Systems Magazine. Connected applications save money and fuel by improving routing efficiency, traffic density, and signal timing







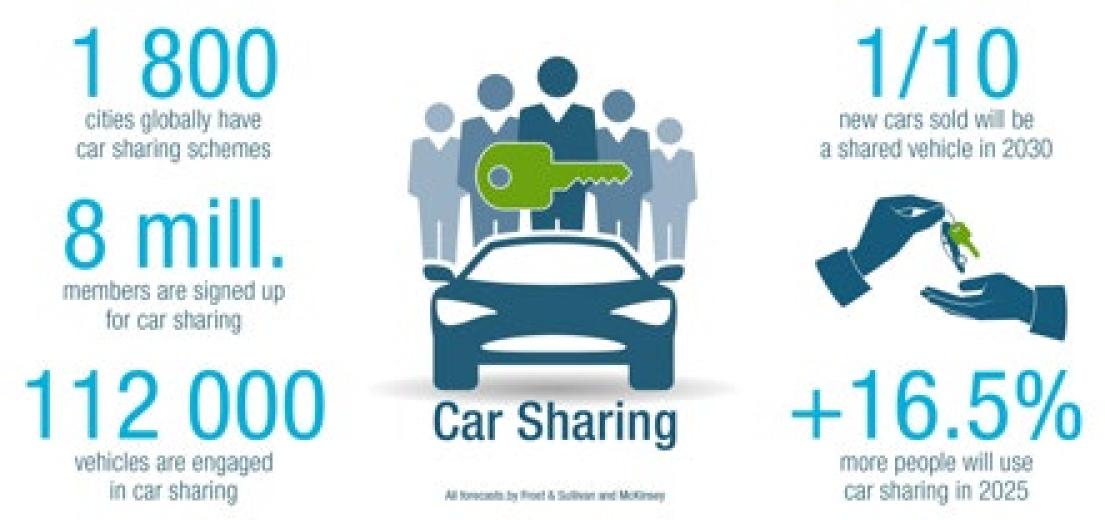
Collaborative traffic reporting and routing



Vehicles may work together to lighten road-load



## Improved routing and shared mobility reduce energy

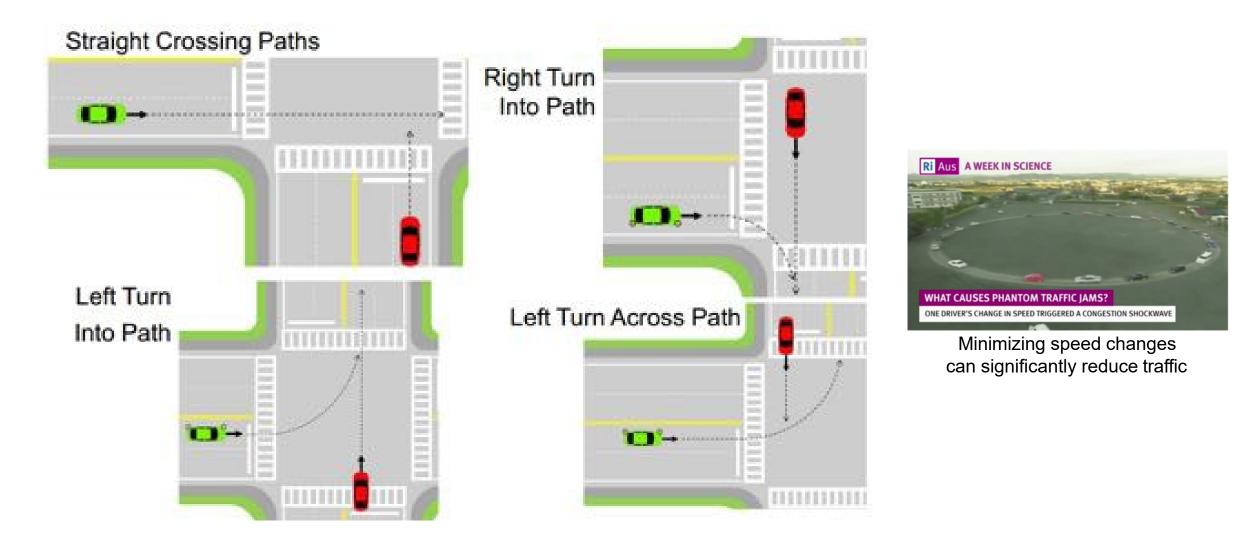


10-40% fuel savings from improved routing and traffic shaping alone [McKinsey, 2015]



Figure [Höegh Autoliners]

### Large-scale routing reduces wait times and shockwave traffic



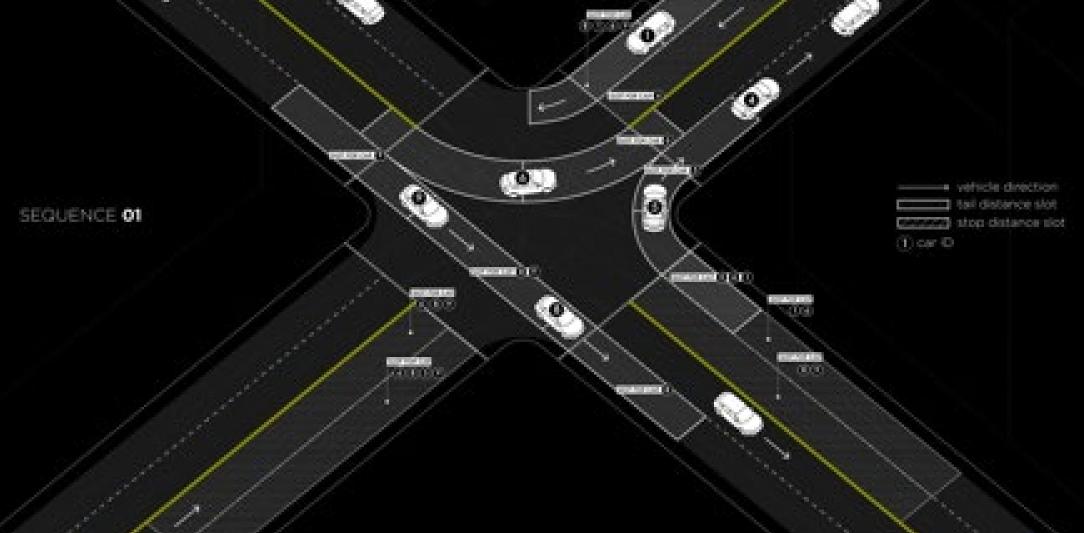


# Tomorrow, data will enable new applications





making a sylfid last



http://senseable.mit.edu/light-traffic/

we have the dependent of

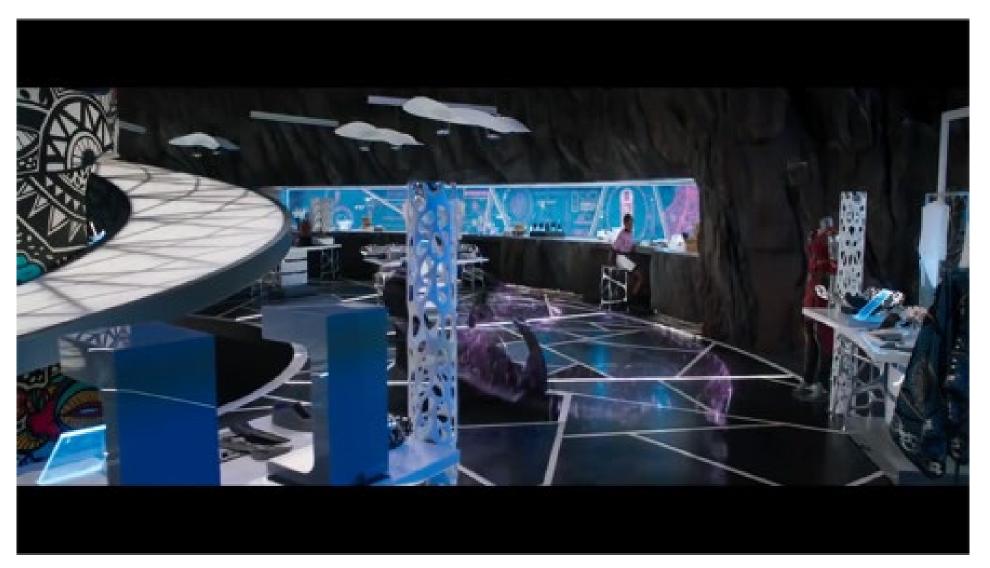
### Car-to-car networks may be used for content distribution

- Car-to-car media streaming
- Over-the-horizon vision





# 5G may soon enable high bandwidth, low latency telepresence



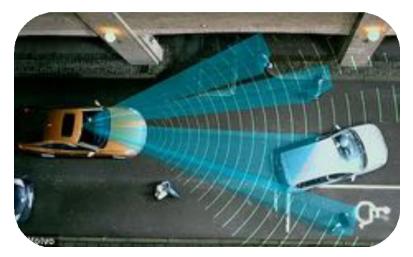


# Automation is taking hold in parallel to the connectivity revolution



#### Automation can improve transportation safety and efficiency

- Handle complex tasks (like parallel parking)
- Warn drivers of potential issues (traffic stopped up ahead)
- Augment driver control (lane keeping)
- Intervene under special circumstances (automated braking)
- Control vehicle motion (adaptive cruise control)



• These are primarily "advanced driver assistance systems" (ADAS)



### There are "degrees of automation" in self-driving



#### Level 0 has no automation

- The driver completely controls brakes, steering, and throttle at all times
- Fun! But also (comparatively) unsafe





#### Level 1 supports supervised steering or velocity assistance

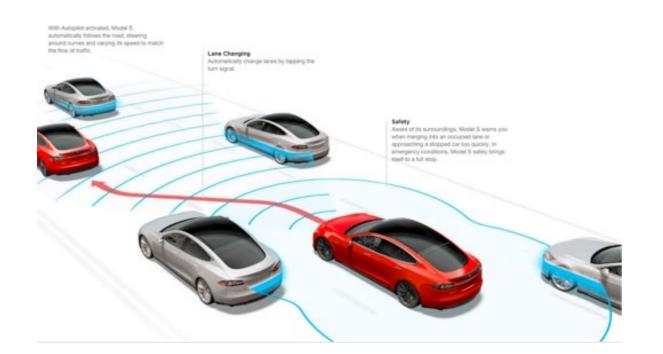
- One function, like cruise control, lane keeping, or parking may be automated
- Drivers are fully engaged and responsible for direct physical control (hands on steering and feet on pedals at all times)
- Function-specific automation more than true automation





#### Level 2 supports supervised steering and velocity assistance

- **Combined function automation**, e.g. multiple simultaneous control functions, like speed and lane keeping
- Drivers monitor the roadway and are prepared to take control at all times
- System may self-disengage if driver becomes distracted





#### Level 3 drives itself, but may know to ask for a human handoff

- Drivers rely on vehicle for safety-critical functions
- Vehicle monitors for conditions that will require human-handoff and notify the driver
- Drivers may reduce active roadway monitoring, but must be ready to take control within 2-3 seconds (*is that really feasible?*)
- This is the state-of-the-art today



# L1-3 is **shared control** – like a human riding a horse, the human has control but the horse wont jump off any cliffs it knows about





#### Level 4 drives itself without supervision under set conditions

- Vehicles may operate fully without occupants (e.g. for package delivery)
- **May be limited** by area (geographic region), intersection type (roundabouts), or certain weather patterns
- This is the lowest-level truly-driverless car, capable of stopping itself safely in unknown situations without human intervention





#### Level 5 drives itself without supervision in all circumstances

#### • We're a long way away due to:

- Human interactions (unpredictable drivers, pedestrians, cyclists)
- Existing infrastructure (non-connected intersections)
- Incomplete mapping
- Other deeply-entrenched patterns

# The last 10% of automation is 90% of the effort

 The biggest challenge may be working with roads and traffic "as-is"





#### The concept is not new, but technology is maturing



#### We are following a **winding**, **90-year path to AV's**





# Beyond actors like Google, Tesla, Uber, Ford, and GM, there are **260+** *supporting* companies

#### THE FUTURE OF TRANSPORTATION STACK

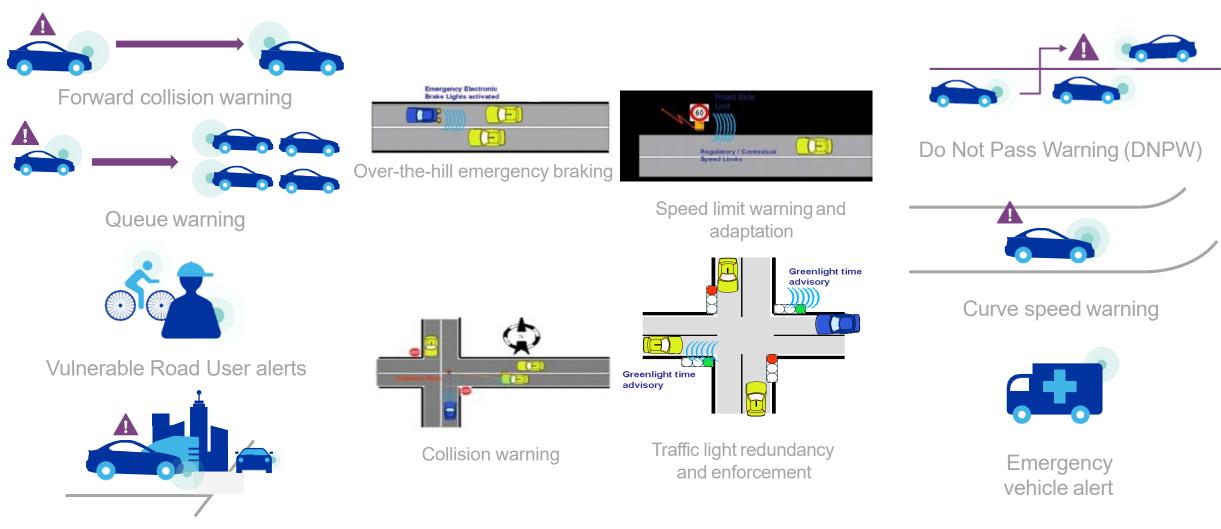
#### @COMET LABS



### **Cutting-edge CAVs already transform fleet operations**



#### Some applications are safety-related



Blind intersection reporting

Modified from Qualcomm, "Leading the world to 5G: Vehicle-to-Everything"

#### Platooning uses V2V to enable efficient adaptive cruise control



https://arstechnica.com/cars/2019/04/this-semi-autonomous-truck-tech-could-seriously-boost-fuel-efficiency/

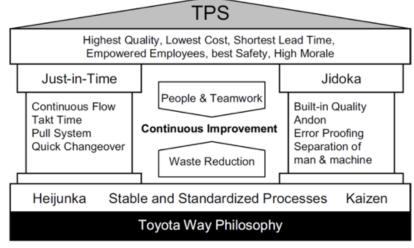
### There are great opportunities on the horizon for CAV's



#### We are entering the era of automotive mobility 3.0



Automotive Mobility 1.0 Henry Ford Moving Assembly Line ~1920



Automotive Mobility 2.0 Toyota Motor Company Toyota Production System ~1980



Automotive Mobility 3.0 Waymo, Tesla, Cruze, Uber, ... High Automation Today

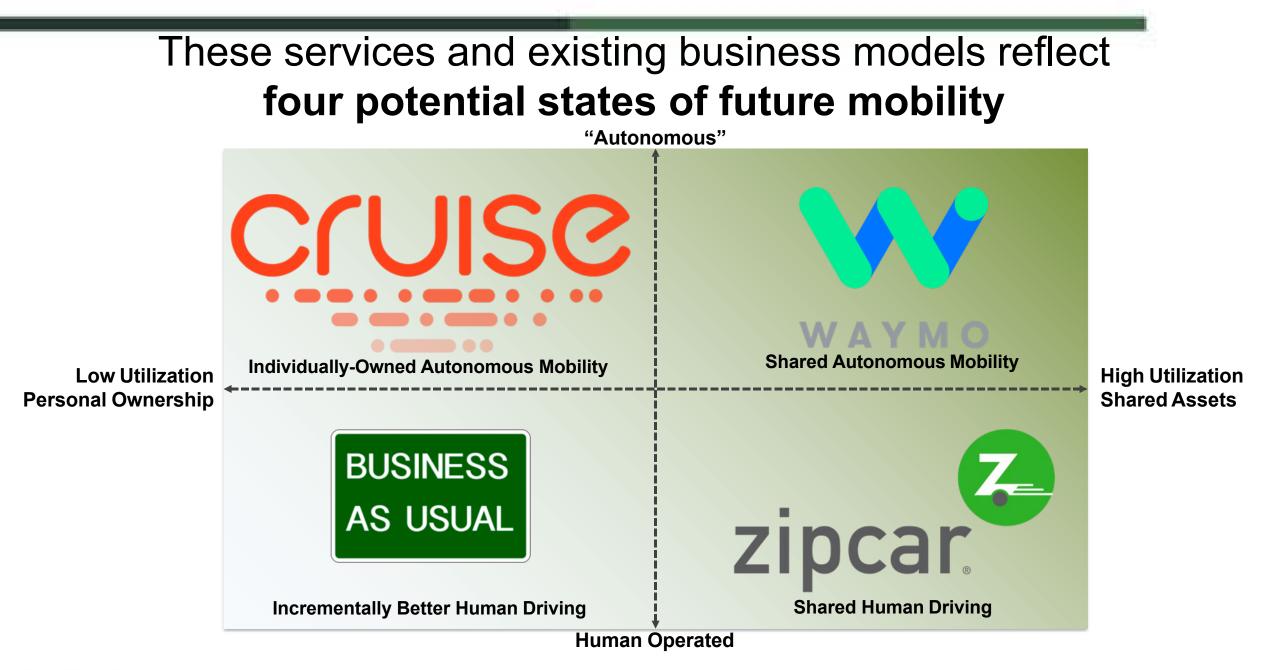
Technological innovations lead social revolutions (democratized vehicle ownership, high-reliability transportation, and ride-sharing)



#### Self-driving is expensive; shared mobility is a likely solution

- Capital costs amortized by multiple drivers / types of cargo
- Higher utilization and uptime than vehicles today
- **Different vehicles used for different purposes** (small pods for individual drivers, buses for large groups, cargo-carriers for packages)



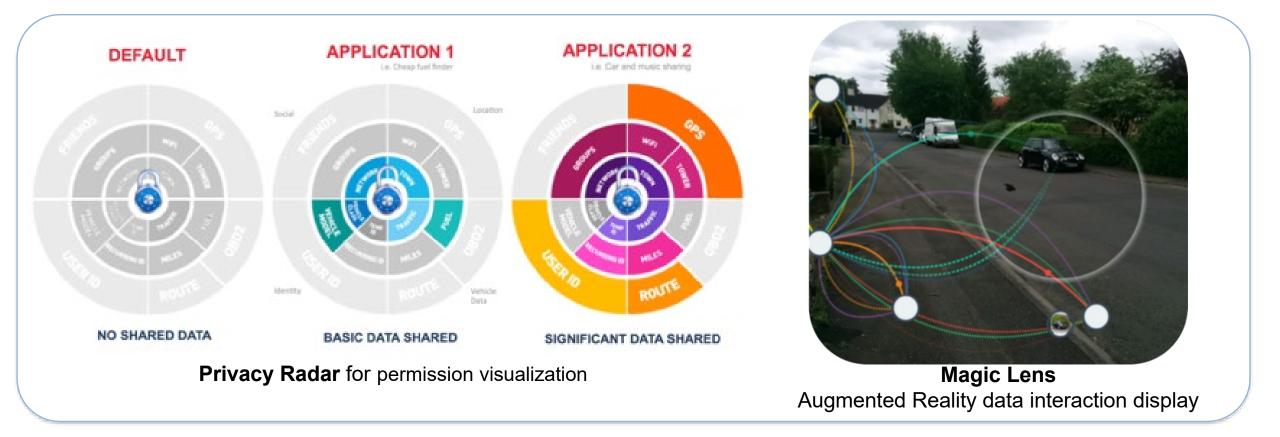


DeepTechLab

### **Technological revolution is not without challenges**



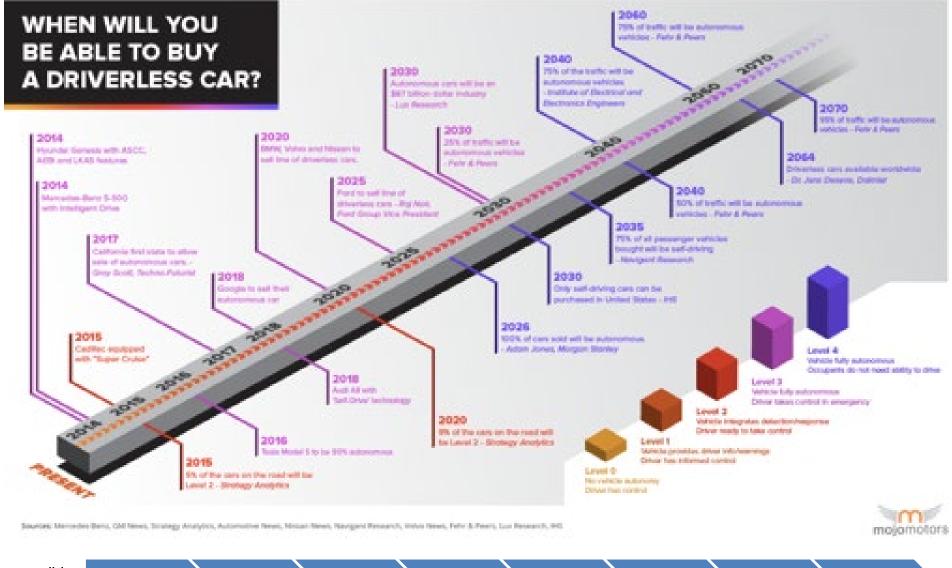
# Connectivity requires thoughtful design to ensure privacy and security



E. Wilhelm, J. Siegel et al. "CloudThink: a scalable secure platform for mirroring transportation systems in the cloud." Transport, Volume 30, 2015. S. Mayer, J. Siegel. "Conversations with Connected Vehicles." IoT Conference, 2015.



#### Full automation may (not) be closer than we think



One possible DeepTechL pathway:

Ultrasonic parking sensors Radar crash avoidance

Radar cruise Blind spot control Blind spot

Lane keep assist

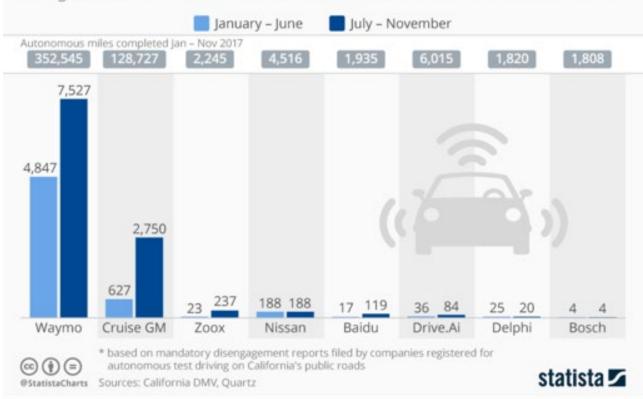
V2V/V2X/V2I

Connected infrastructure Full automation

#### **Disengagement frequency** (miles per E-stop) tells the story best

#### Autonomous Vehicles Are Quickly Improving

Average number of miles driven in autonomous mode without human intervention in 2017\*





#### What did we cover?

- Cars are computers that generate and share data, supporting local and global optimization
- Connectivity supports vehicle resilience, responsiveness, and design
- Automation is not new but recent advances enable higher degrees of autonomy
- Autonomy supports low-cost, efficient fleet operations
- Technology implementation is not without challenges





#### **Thank You & Questions and Answers**

Prof. Josh Siegel, Ph.D.

j\_siegel@mit.edu jsiegel@msu.edu



# 

- CEO and co-founder of Revvo Technologies
- Responsible for driving the company's strategy and product vision with the mission of enabling every tire to be smarter
- Prior experience with data analytics at Medallia and an enterprise software company
- Holds multiple patents, including ones for his development of brain navigation systems used by neurosurgeons
- Avid car enthusiast and races BMW SpecE30's
- PHD, MS and BS Degrees in Electrical Engineering and Biomedical Engineering from University of Michigan

Sunjay Dodani sunjay@revvo.ai

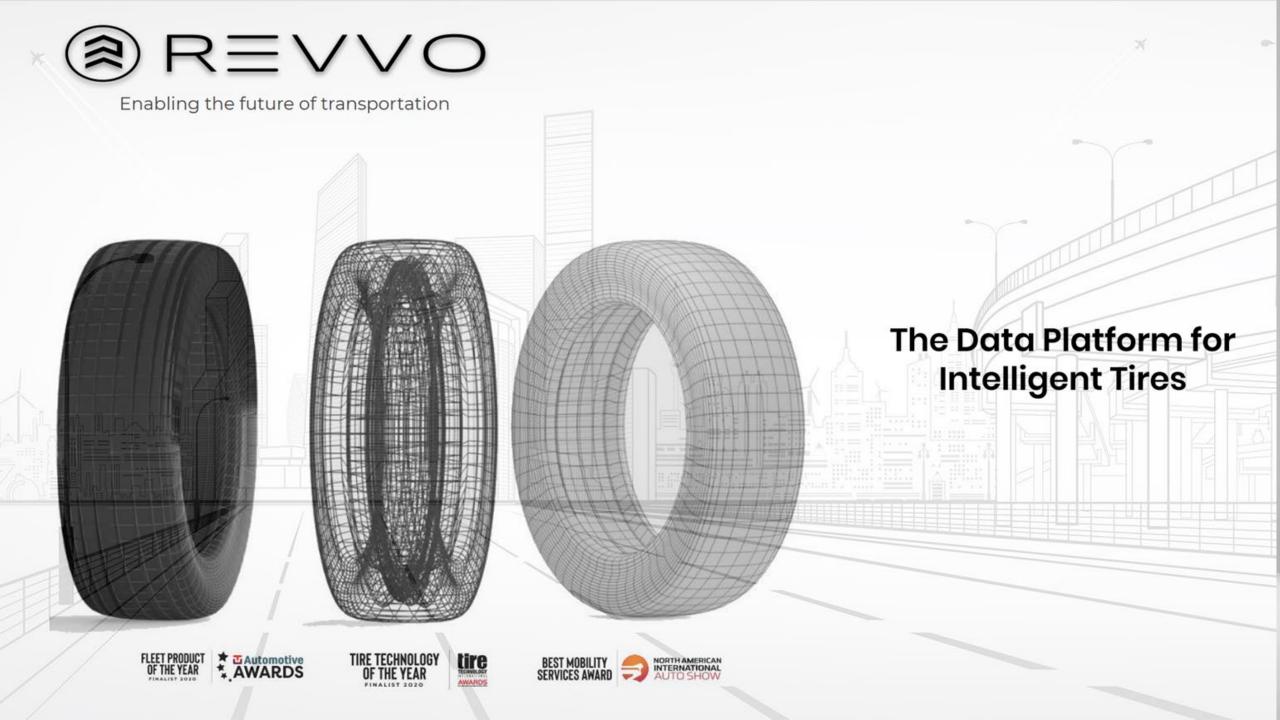
REVV





Jonathan Ford jonathan.ford@cityoforlando.net

- Fleet Manger for the City of Orlando
- Involved in strategy and management in Green Works Orlando, a widely recognized and successful sustainability effort with attention to quality of life, economic growth, and equitable access for the entire Orlando community
- US Air Force Veteran Fleet Management and Logistics



# Tire Pain Points We've Heard from Fleets

Tires are the #1 OpEx







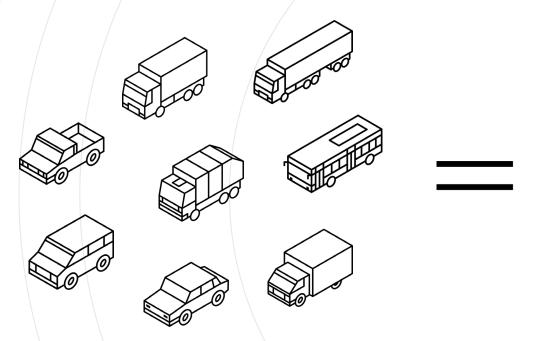
Wasted time

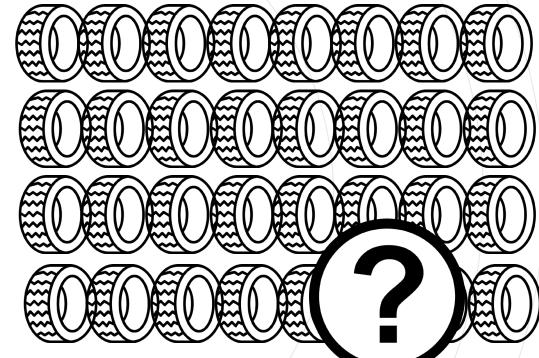


"My technicians spend too much time on basic tasks like tire pressure and tread depth checks. I wish I could free up their time to do more important work."

- Fleet Supervisor

# Visibility at Scale





#### Do you know how many tires you have to manage?

1000 passenger vehicles = 4,000 tires

500 buses = 3,000 tires

1000 refuse trucks = 10,000 tires

## Revvo's smart tire platform



Smart and connected tires (**Pressure**, **Temp, Tread, Load**, footprint, rotation, alignment, driver behavior)

Remote tire monitoring + predictive analytics



Best in class fleet tire management

Reduce tire costs

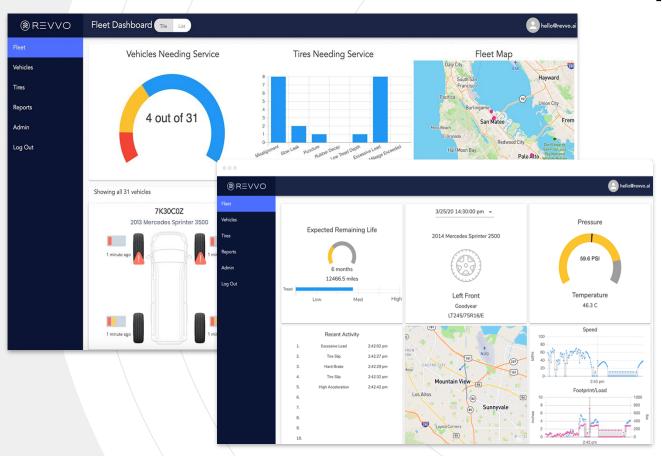
Improve safety

Increase efficiency

Enhance productivity

Revvo enables tires to be smarter so that fleet operators can make the best data-driven tire decisions.

## **Revvo Dashboard & Reports**



Real-time remote tire management that gives you complete visibility into the status and condition of every tire in your fleet

			Reports					
			II. Report Dashboard					
			II. Fleet		127	<u>6</u> 0		
Revvo	Report:	Historical Pre	& Post Inspec	tion Trip Su	mmary Report			
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Reports that provide actionable tire insights so that you can make better tire-related decisions

### CITY OF ORLANDO + REVVO

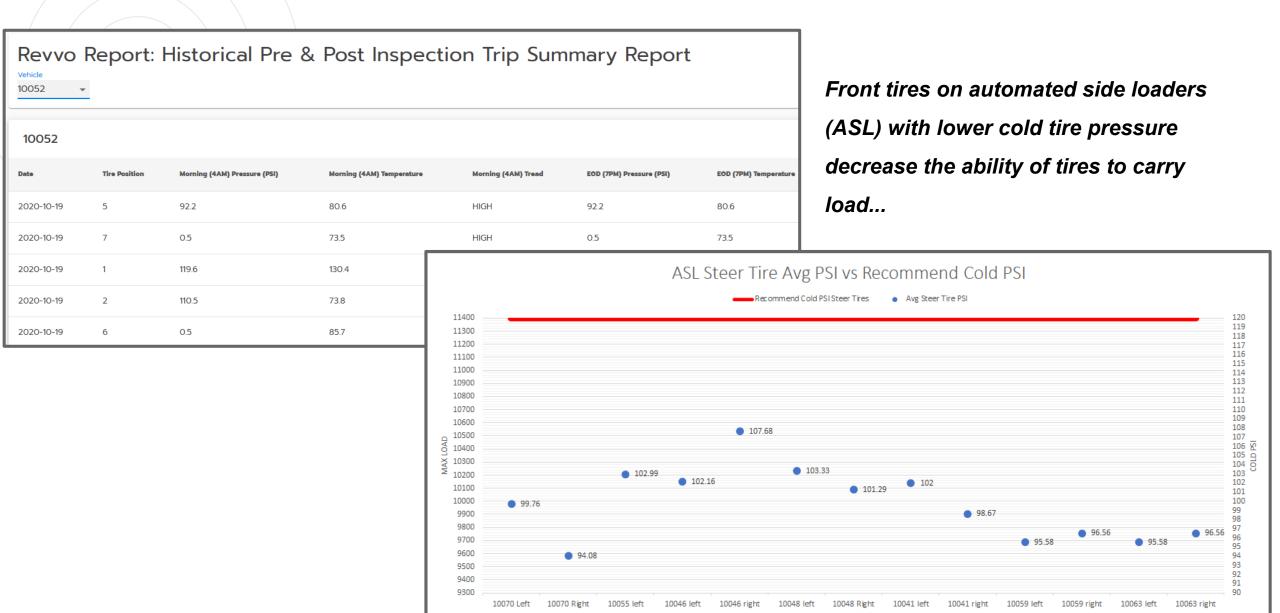
City of Orlando has >3000 vehicles in Fleet

Revvo deployed first in Refuse Trucks  $\rightarrow$  High Tire \$pend

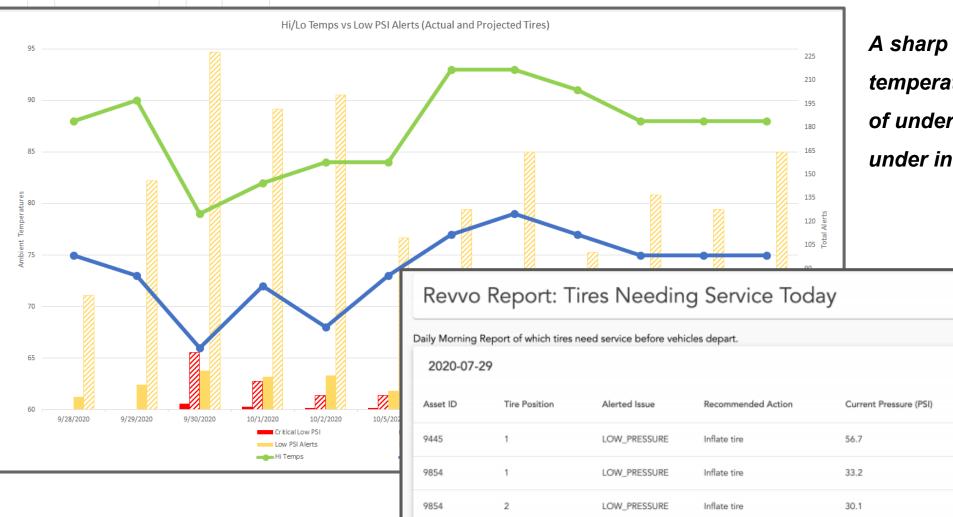
<u>Goal</u>:

- i. Improve safety of trucks on road
- ii. Reduce overall tire spend
- iii. Improve technician efficiency

## **Orlando - Underinflated Case for ASL**



## **Orlando - Temperature vs Tire PSI**



A sharp decrease in ambient temperatures can result in a spike of under inflated and critically under inflated tires within hours...

Recommended Pressure (PSI)

70

42

42

Current Tread Level

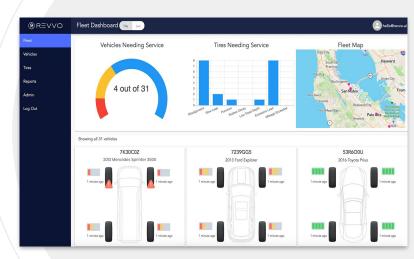
HIGH

HIGH

HIGH

### ROI of Revvo so far..

- $\checkmark$  Freeing up Techs to do other work during PMs
  - Electronic record of Pre/Post Trip tire inspections
- ✓ Anticipate less tire related road call, towing, and lower tire spend
- Revvo working directly with Orlando tire service vendors to improve day-to-day tire maintenance



Enabling the future of transportation.

REVVO

#### Interested in getting in touch?

sunjay@revvo.ai or josh@revvo.ai

(630-207-4512)





Andy Wolpert <u>ADWolpert@columbus.gov</u> 614-223-2170

- Deputy Program Manager for the Smart Columbus program
- More than 20 years engineering experience from design-build projects to intelligent transportation solutions
- Has successfully led multiple technology projects designed to provide equitable, safe and reliable transportation nationally advancing mobility
- BSCE from Ohio Northern University and MSCE from Ohio State
   University

# SM RT columbůs

## Transforming America's Smart City through Open Mobility

Andrew Wolpert, PE Smart Columbus Deputy Program Manager





MID-SIZE CITIES RESPONDED TO THE US DEPARTMENT OF TRANSPORTATION'S SMART CITY CHALLENGE



WORLD CLASS FINALISTS COLUMBUS AUSTIN DENVER

PORTLAND PITTSBURGH KANSAS CITY SAN FRANCISCO

#### WE WON \$50 MILLION



\$40 M

A Paul G. Allen Company

\$10 M

TO BECOME THE TEST CITY FOR SMART CITIES

BY DEPLOYING A COMPREHENSIVE TECHNOLOGY PLAN THAT PUTS PEOPLE FIRST

### COLUMBUS WON THE MANDATE TO BECOME THE MODEL

AND WE'LL DO IT THE COLUMBUS WAY

**\$90M** JUNE 2016 \$500M

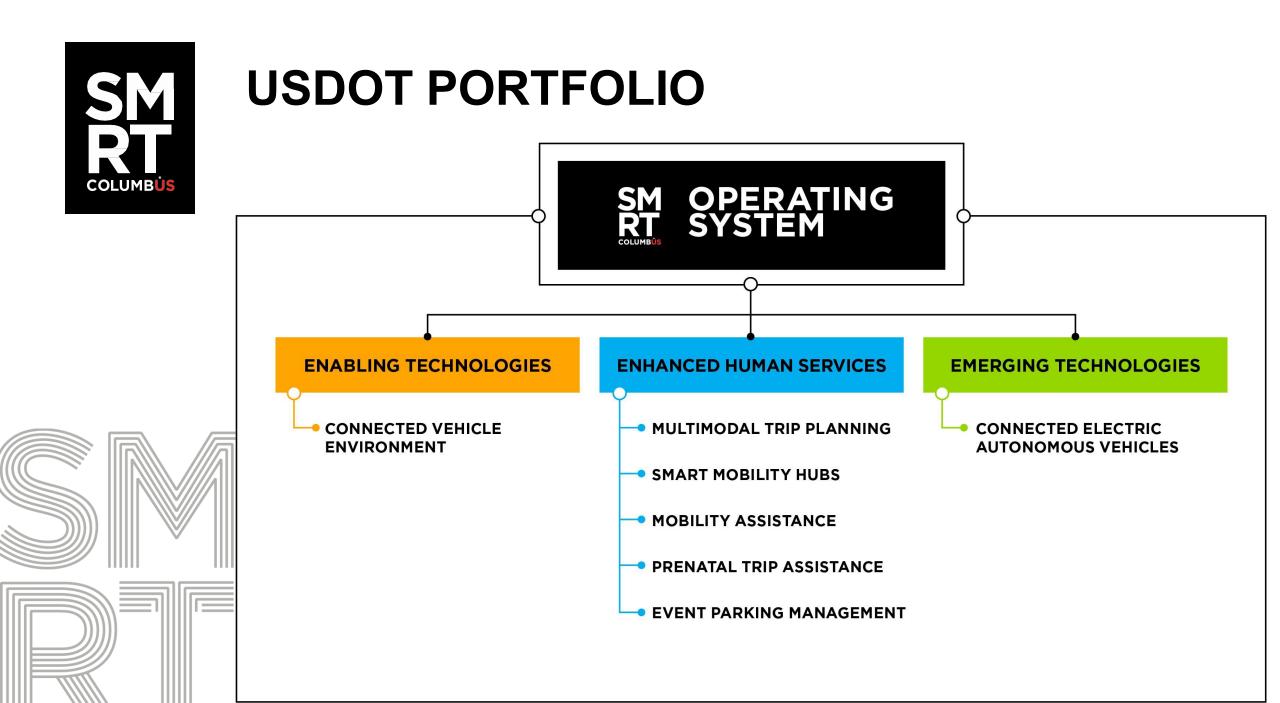
\$1E





To demonstrate how an intelligent transportation system and equitable access to transportation can have positive impacts on everyday challenges faced by cities.







# **CONNECTED ELECTRIC AUTONOMO** VEHICLES





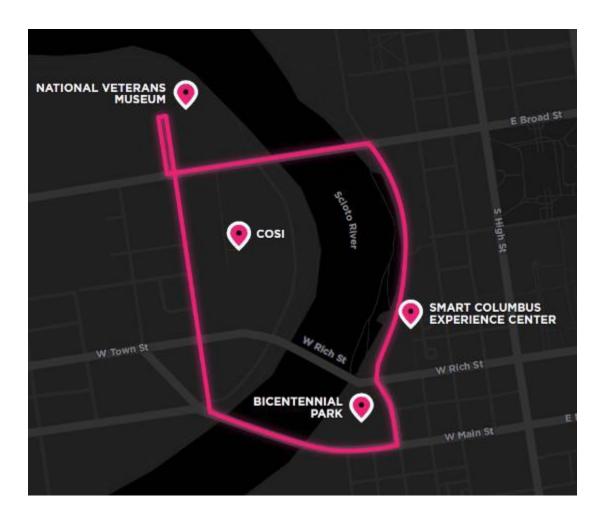
Drive **hio** 

THE CITY OF

THE OHIO STATE UNIVERSITY

### **SMART CIRCUIT**

- Served public educational purpose and deployment learning for project team
  - Develop lessons learned
  - Use experience for other deployments in Columbus and Ohio
  - Connect educational and cultural resources





### **PROCUREMENT PROCESS**

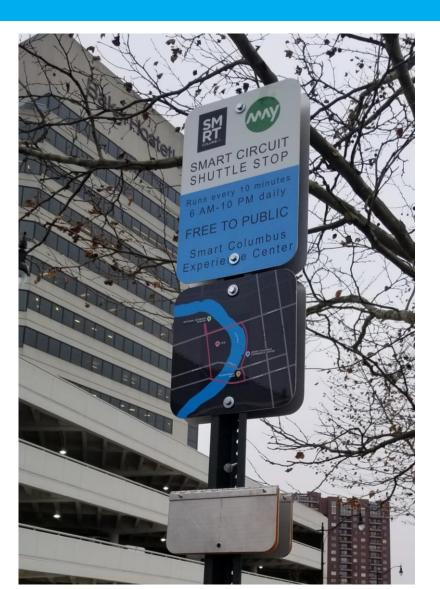
- Developed RFP for Turn-key
   AV Shuttle Operations
- One-year contract
  - Mobilize and deploy
  - 10 months of service
- Evaluated on past performance, proposed approach, and price
- Selected May Mobility





### **SMART CIRCUIT**

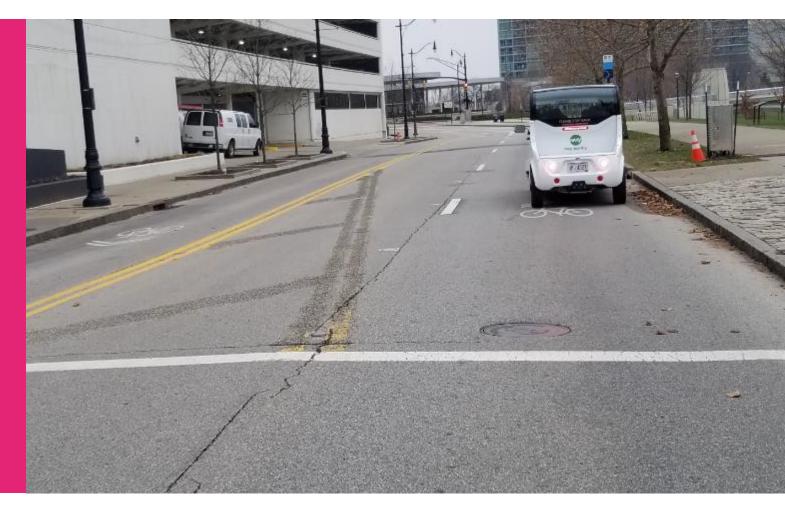
- 16,062 rides
- 19,118 miles driven
- 59 average daily rides





### **LESSONS LEARNED**

- Evaluate stop locations and traffic control
- May need to modify existing striping or signage
- Monitor other vehicle interactions with the AV Shuttle to ensure all interactions are legal





### **LESSONS LEARNED**

- Be clear about terminology and requirements
- Ask specific questions about infrastructure needs, including power and attachments



# LINDEN DEPLOYMENT

elli All

200

1887



### **DEFINING THE PURPOSE**

- Connecting the community to jobs and services
  - Community centers
  - Opportunity centers
  - Food sources
  - Support services
  - Smart Mobility Hubs
- Improving safety and mobility of travelers by mitigating First Mile/Last Mile challenges
- Validate and ensure equitable and accessible options
- Encouraging transit Grow COTA ridership



### **DEFINING THE PURPOSE**

- Establish a common data exchange interface
- Establish a set of procurement guidelines
- Develop a set of AV operational testing and evaluation guidelines to benchmark AVs
- Develop a methodology for evaluating the operational safety
- Summarize lessons learned





### **STAKEHOLDER MEETINGS**

- Multiple meetings held to identify and refine routes
- Provide input into RFI
- Reconvene to review RFI responses
- Final input on route and scoring





### **RANKING CRITERIA**

Criterion	Description
Smart Mobility Hub	The route provides a connection to a proposed Smart Mobility Hub as part of the Smart Columbus initiative.
Food and Service Access	The route connects to food and services needed within a community. The list includes: grocery store, bank, pharmacy, and food bank/pantry
Ladders of Opportunity	The route connects residents with job or opportunity centers for enhanced placement access. The list includes an Opportunity Center and Ohio Means Jobs.
COTA	The route connects to a COTA stop and acts as a FMLM connection to expand the reach of a traveler
Alignment Considerations	The route serves more as a missing link than a duplicate of an existing COTAroute.
Safety and Accessibility	The route has lighting and sidewalks in the vicinity of anticipated stops.
Prenatal Support	The route connects pregnant women with services that can aid in a healthy pregnancy.
Neighborhood	The route connects to an opportunity neighborhood for increased mobility.
Storage	The route provides a nearby facility for storage and charging of vehicles.
Route navigation	The technology at the time of deployment will allow the route to be traveled.
Recs and Parks	The route connects to a City recreation center or park.



### **SELECTED ROUTE**

- Access to 2 Smart Mobility Hubs
  - Linden Transit
     Center
  - St. Stephen's
- Access to Services
- FMLM Connection
- Fills Transit Gap





### TIMELINE

- RFP published 1/17/19
- Turn-key shuttle service
- Notice to Proceed June 2019
- Testing December 2019
- Began Operations February 2020
- Feb. 20, 2020 Passenger incident
- Passenger service currently
   on hold due to COVID-19
- Began new use case of delivering food to the neighborhood

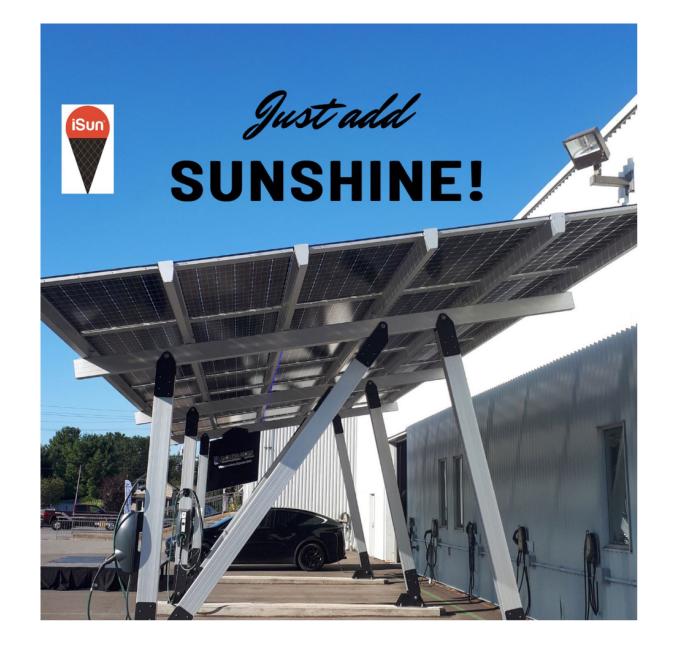




Sass Peress sass@isunenergy.com 514-909-5047

- CEO of iSun Energy & Renewable Energy Ambassador
- High-energy, innovation architect with achievements in global renewable energy product development and marketing, public company leadership and community involvement
- Passionate champion of renewable energy and clean mobility since launching ICP Solar in 1988
- Founded Quebec's first ever solar panel factory in 2001
- Currently enjoying true sustainable living in a fully hydroelectric and wind powered home
- Assisted in Tesla's design of their own solar canopy for their SuperChargers
- Involved daily in the electric vehicle communities both on and offline

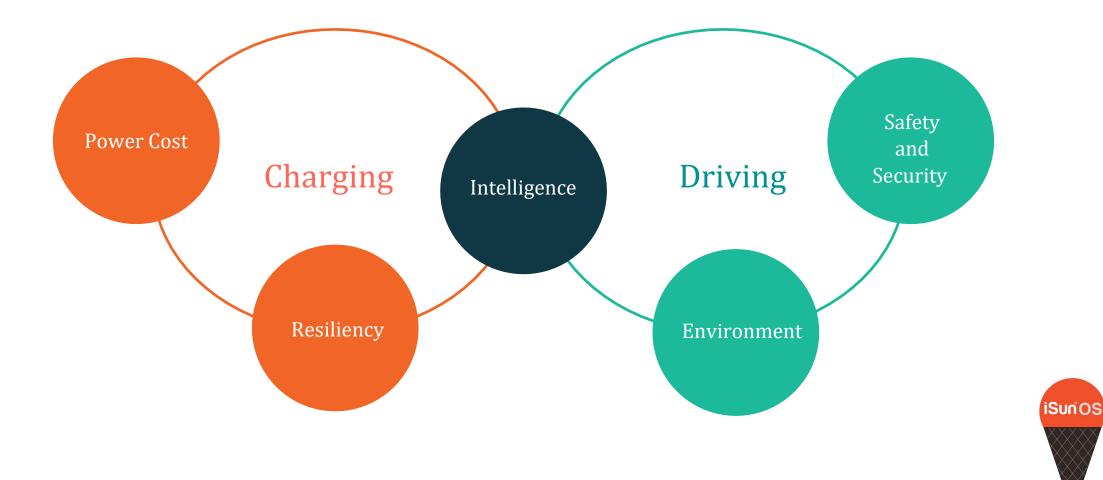




#thinkbeyondthebarrel



#### A fleet goes beyond the vehicle...



### **Optimize your fleet charging for...**



### **CARBON FREEDOM**

### **DATA CAPTURE**

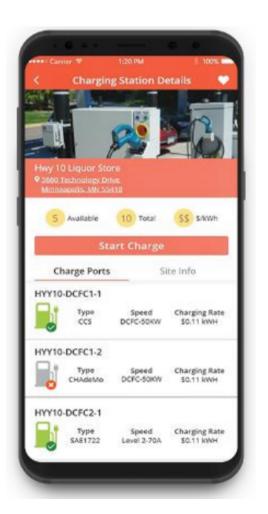
### RESILIENCY

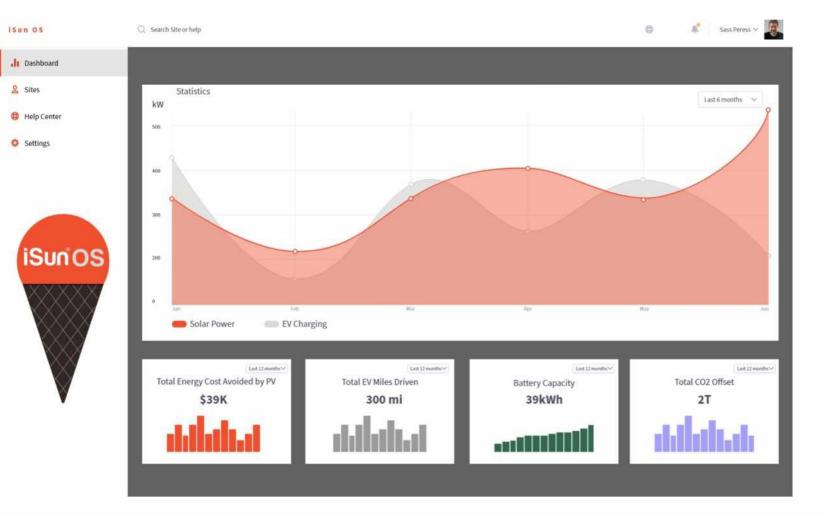
### FLEXIBILITY

### INTEROPERABILITY



#### ...make it easy and smart





### Key characteristics of EV charging best practices

Resilient



Intelligent



Scalable



Clean



Branding

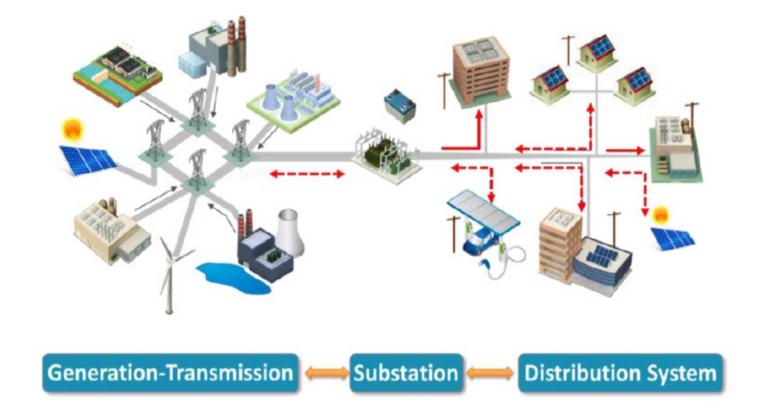


Low Maintenance





#### ...with returns on your investment services





#### ...and returns on impact

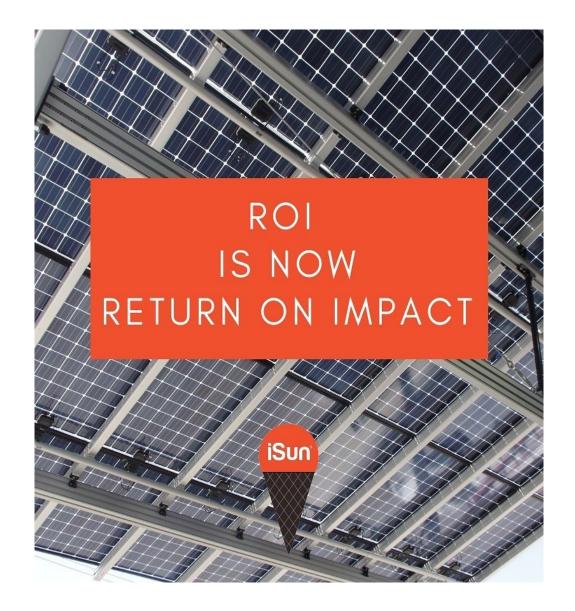


#### Prenatal Exposure to PM2.5 Linked to Growth Delays After Birth



A study published in the journal Environment International shows that children born to women who are exposed to higher levels of fine particle air pollution (PM2.5) are more likely to have decreased weight and BMI at 4 years of age. The study was conducted in multiple cities in Spain as part of the Infancia y Medio Ambiente (INMA) study. Air pollution was assessed during all 3 trimesters of pregnancy, and during the child's first year of life. Children's birthweight and length, and height and weight at

The results showed lower weight at 4 years of age for children whose mothers had higher PM2.5 exposure during the first trimester. The researchers adjusted for air pollution exposure in the other trimesters of pregnancy







Derrick Redding <u>derrick@automotivetechnology.tech</u> 734-548-2604

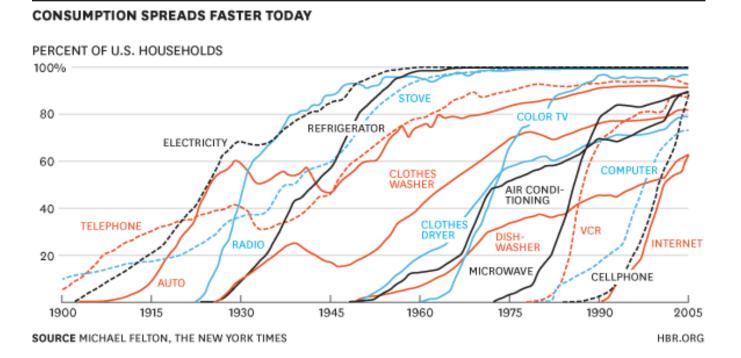
- Partner at Automotive Technology Consulting
- Identifies and executes value creation in new technology innovation
- Broad and diverse experience with Toyota from assembly to finance, cost reduction, product development & innovation
- Recent innovations include camera/sensor cleaning for AVs, Driver Monitoring Systems for drowsiness detection, and creating upfit processes for Connected Vehicles
- Led the Technology Maintenance Council task force to improve visibility for truck drivers and currently working on their Future Cab task force

Technology Adoption of Fuel Economy and Safety Technologies for Commercial Vehicles

Derrick Redding derrick@automotivetechnology.tech c 734-548-2604



#### **Adoption Rates for New Technology are Accelerating**



Technology Consulting

1900-1930: many technologies took ~60 years to reach 80% adoption. 2000: the cellphone took 8 years to reach 80% adoption.

Many new options for vehicle technology. However, more challenges to evaluate new technologies that work <u>and</u> deliver the promised benefits.



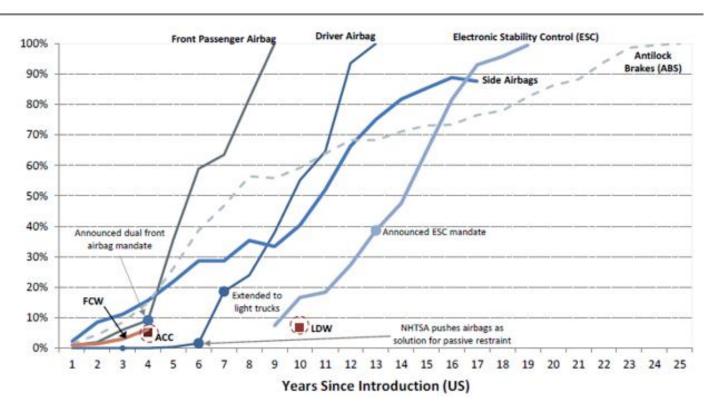
#### **Discussion Agenda**

- 1. Safety Technology Adoption in Passenger Car
- 2. Technology Adoption in Commercial Vehicle
- 3. Implications for Commercial Vehicle
- 4. Best Practices in Technology Evaluation



### Safety Technology Adoption in Passenger Car

### Historical Adoption Rates for Automotive Safety Technology



*Key:* ABS: Antilock Brakes FCW: Fwd Collision Warning ACC: Adaptive Cruise Control

Automotive

Technology Consulting

Without Regulated Mandates, about 20-30 years to reach 80% penetration. E.g. ABS With Mandates it takes ~7 to15 years to reach 80% penetration. E.g. Driver Airbag: 10 yrs

#### In-progress and Not-Mandated:

Radar: at 20 years, 65% penetration. Blind Spot Detection: at 11 years, 10% penetration FCW & ACC are adopting at rates even below ABS.

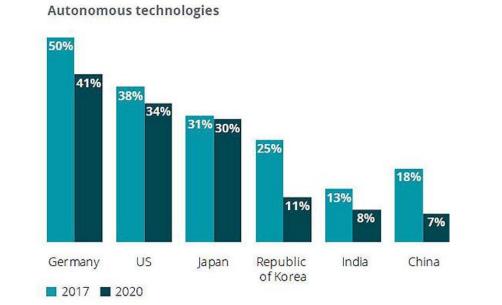
#### **Challenges to Safety Technology Adoption in Automotive**



Source: Deloitte 2020

Billions spent by Automotive OEMs and Suppliers on safety and AV Tech. Many exciting new technologies are ready or near ready for Level 3/4. But, adoption has been much slower than expected.

Why? Major barrier is that consumers won't pay extra for technology in cars:



Percentage of consumers who are unwilling to pay any more f

### **Challenges to Safety Technology Adoption in Automotive**



Additional causes affecting adoption in automotive:

- 1. New car prices are frozen
- 2. NHTSA not mandating new safety technologies. However, Europe and China are moving forward.

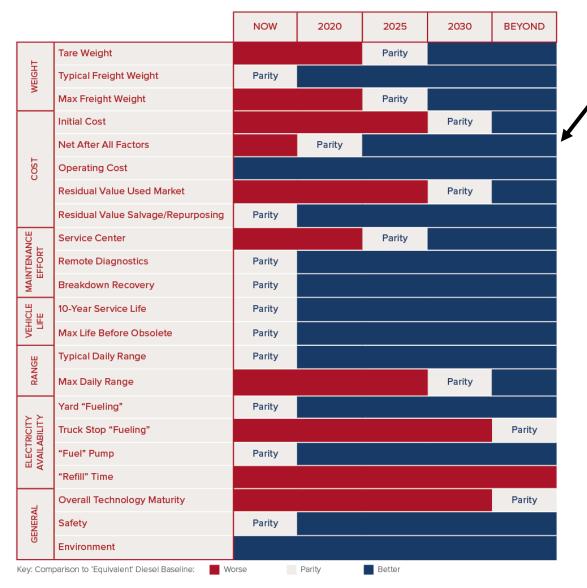
Significantly different dynamics at play in Commercial Vehicle for new technology and seeing some examples of faster adoption in CV compared to car.



#### Technology Adoption in Commercial Truck

#### **EV Adoption in Medium Duty Truck**

CLASS 3 THROUGH 6 CBEV PARITY VS. DIESEL SYSTEM (NACFE)

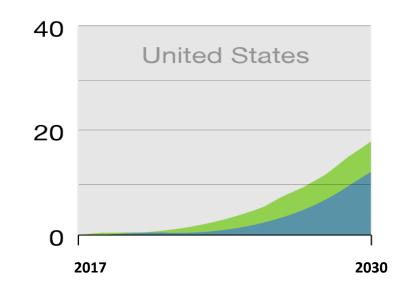




#### Economics for MD EVs make sense:

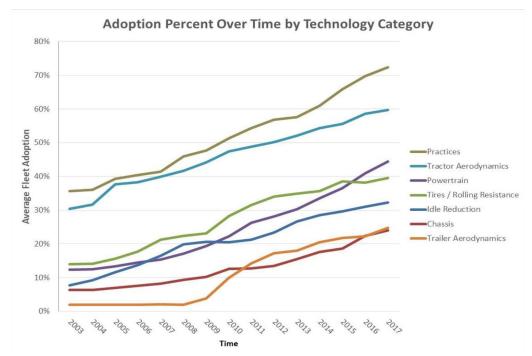
- 1. Inter-city trucks run ~100-200 mi/day
- 2. Start and end in the same place
- 3. Parked overnight for easy charging
- 4. High upfront fixed cost vs. lower operating costs.

#### Projected MD EV Adoption:



### Fuel Efficiency Technology Adoption in Class 8 Truck



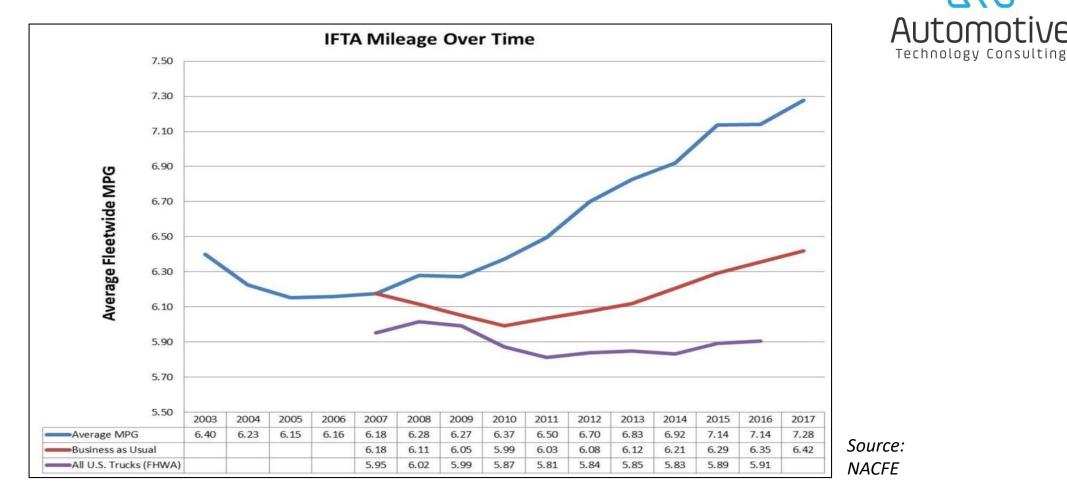


Source: NACFE

Over 85 fuel saving technologies available in 2019. Not all are effective. Many are being implemented at the same time.

Technology alone typically doesn't deliver all of the benefits. The driver interface and driver behaviors are very important to making technology work and optimizing operational improvements.

#### **Results of Fuel Saving Technology in Class 8 Trucking**



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Progressive fleets operating at  $\sim 7\%$  higher fuel efficiency than the average fleet. When new technologies are used, fleets operate at over 20% better than average.

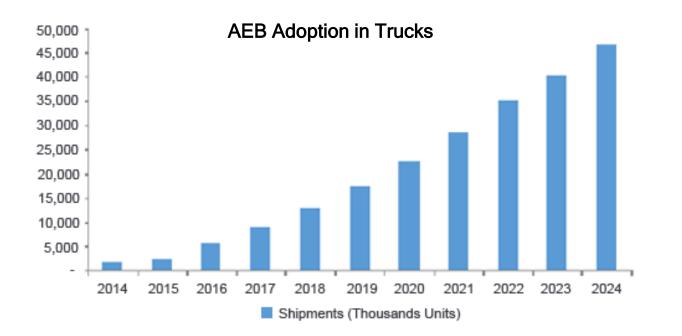
#### Safety Technology Adoption Example – Automated Emergency Braking (AEB)



AEB has shown a 40-70% reduction in rear crashes.

Car adoption started strong, but has slowed, especially in the US.

Truck adoption has taken off, especially on Class 8 trucks.



#### **Driver Monitoring Systems – Measuring Attention**

#### What is an "Acceptable" Off-Road Glance?



Glance: On-Road Glance Length (s): 2.50 Percent Off-Road: 41 Max Off Road Length (s): 1.53

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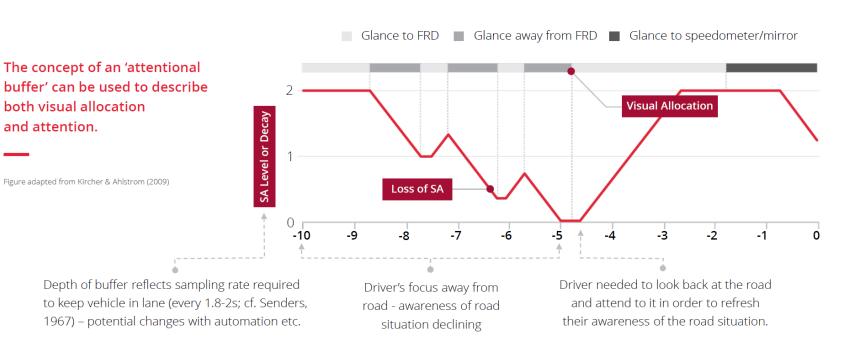
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Significant "Over trust" issues emerging as active safety is adopted. Truck OEMs do not have the answers on how to measure and optimize driver attention



#### **Driver Monitoring Systems – Measure Attention**





# Driver Monitoring Systems(DMS) measure driver engagement to determine the ability to safely re-engage.

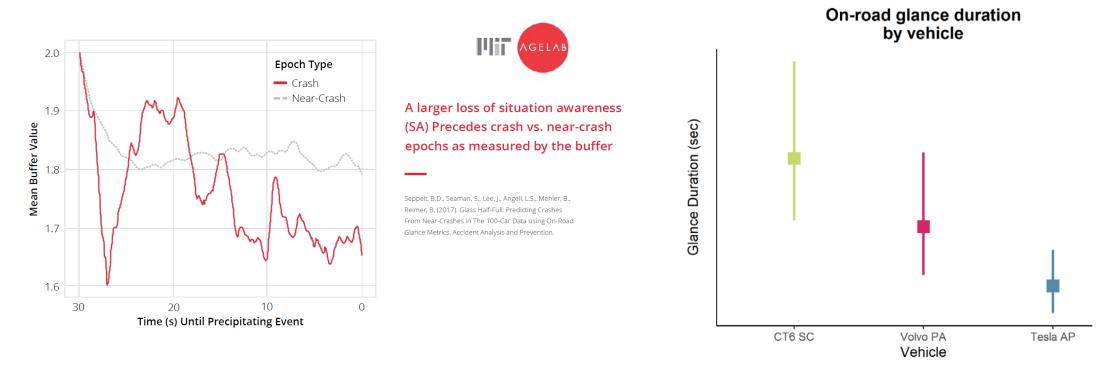


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#### **Driver Monitoring Systems – Measure Attention**





Using DMS with attention buffer measurement will be required to compare the effectiveness of different technologies for keeping drivers safely engaged in driving.

#### **Technology Adoption in Commercial Vehicle**



Many Differences versus Passenger Vehicle favor CV:

- 1. Cost / Benefit analysis using Total Cost of Ownership (TOC)
- 2. Cost ratio a new technology vs. total vehicle cost
- 3. CV prices are not frozen
- 4. Technologies benefit drivers and must gain the support of drivers for adoption
- 5. CV owners have more ability to customize vehicle with the OEM & upfitting

#### **Implications for Commercial Vehicles:**

- 1. Many new technology options available for operational improvement
- 2. Some of these technologies are adopting faster in CV compared to Car
- 3. New technology must support the driver, not replace the driver
- 4. Evaluation is more challenging due to more options & highly integrated tech

## Automotive Technology Consulting

### 1. No process

- 2. Reliance on OEM or supplier sales
- 3. Lack involvement of:
  - senior leadership
  - cross-functional team
  - end user / driver
- 4. "Silver Bullet" syndrome
- 5. Poor operational data
- 6. No tracking tool
- 7. Limited testing capabilities

# COMMON TECHNOLOGY EVALUATION ISSUES

#### **Best Practices in Technology Evaluation**



Stage Gate Process

**Organization &** Roles Defined: **Exec Sponsor** Project Lead, X-functional team

Meaningful operational data

Monthly

**Review:** Project Status, Accountability, Prioritization, Idea Tracking

Engineering Capabilities for Prototyping and Testing

Voice Of The Customer: Drivers

Confirmation of Financial Impact

Following a systematic process leads to: 1)Effective evaluation of technology 2)Significant Operational Improvement 3)Engaged team





### **THANK YOU**

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