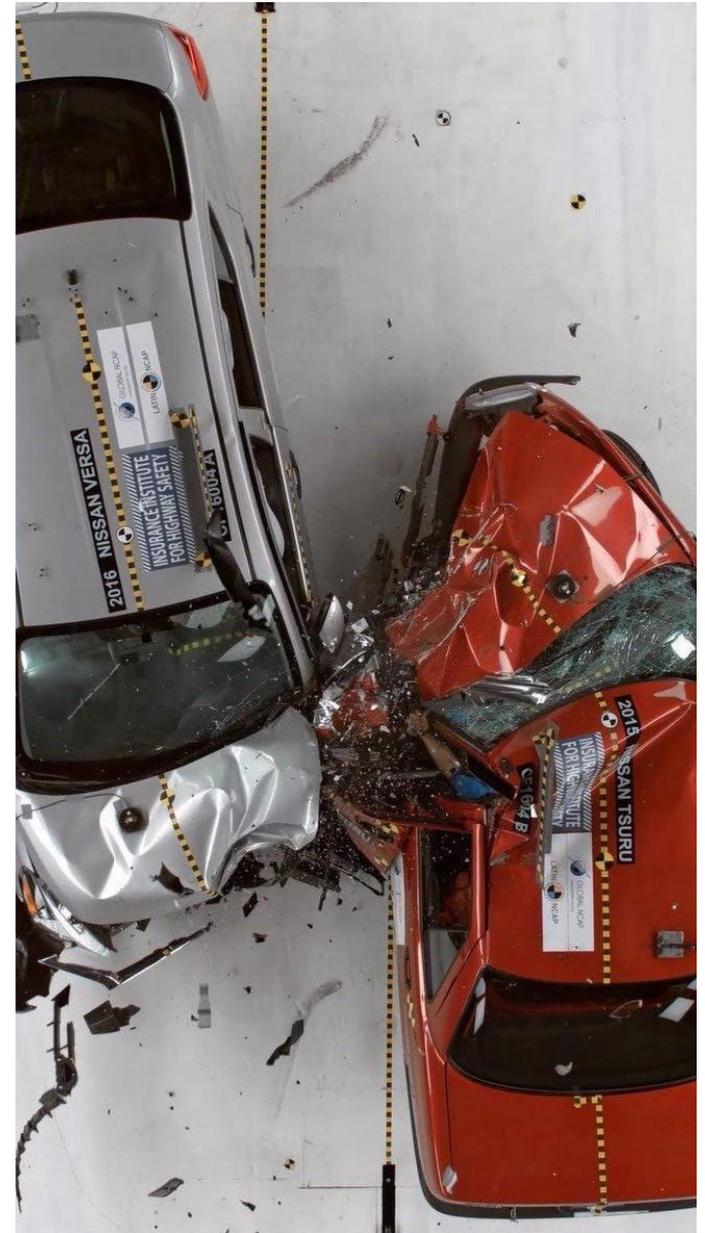


Role of Vehicles Today & Tomorrow

David Ward
Secretary General
Global New Car Assessment Programme

Vision Zero Conference
Stockholm 14-15 June 2017



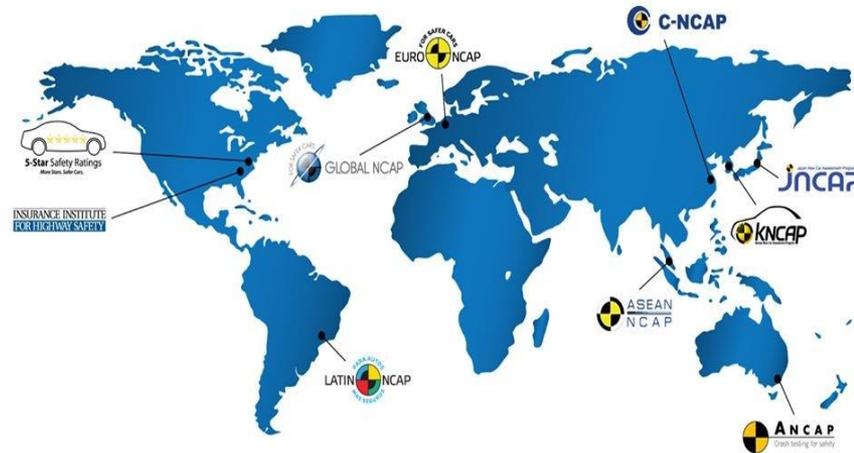
Global NCAP - Building a Market For Safer Cars...Worldwide

The first NCAP was launched in 1979 by the US National Highway Traffic Safety Administration. There are now nine active NCAPs around the world.

NCAPs supplement regulation promoting a 'market for safety' by raising awareness of the car buying public, and rewarding manufacturers that build the safest cars.

NCAPs award stars to car models using crash tests that score occupant protection. These are recorded by measuring the loadings on instrumented dummies. NCAPs also include crash avoidance technologies in their rating systems.

Promoting 5 star vehicles is a key component of Vision Zero strategies.



20 Years of Five Star Progress

Since the launch of Euro NCAP in 1997 & the adoption of European Union crash test standards in 1998 78,000 lives have been saved. The occupant fatality rate across the EU has reduced by about 50%.

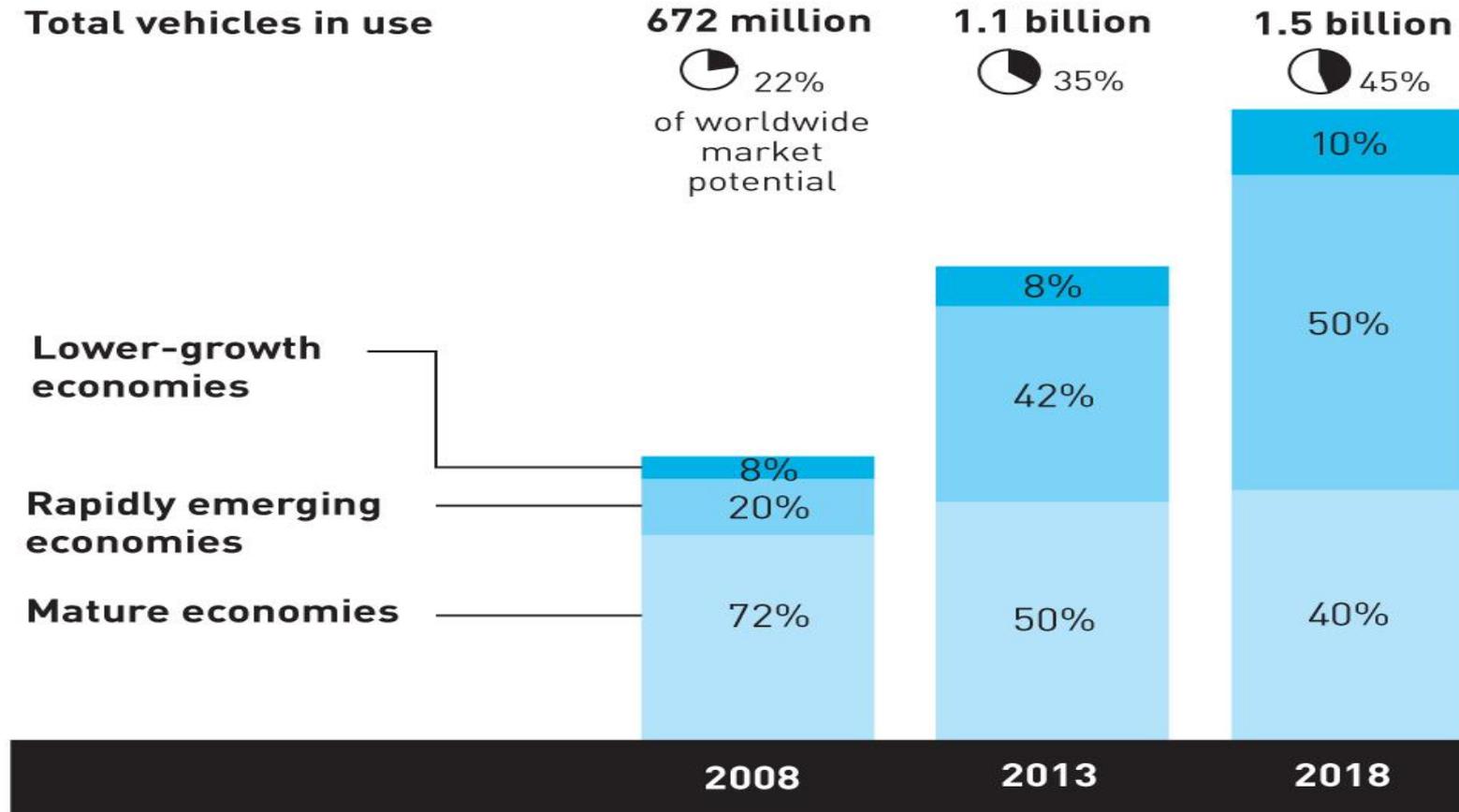
87% of new cars have a valid Euro NCAP rating.

- 4% 3 stars
- 17% 4 stars
- 79% 5 stars

The challenge now is to replicate this success in rapidly motorizing nations many of which do not yet even apply minimum crash test standards.



Changing Geography of Vehicle Use



Source: Booz & Company

Global NCAP's 2020 Vision... Democratizing Car Safety

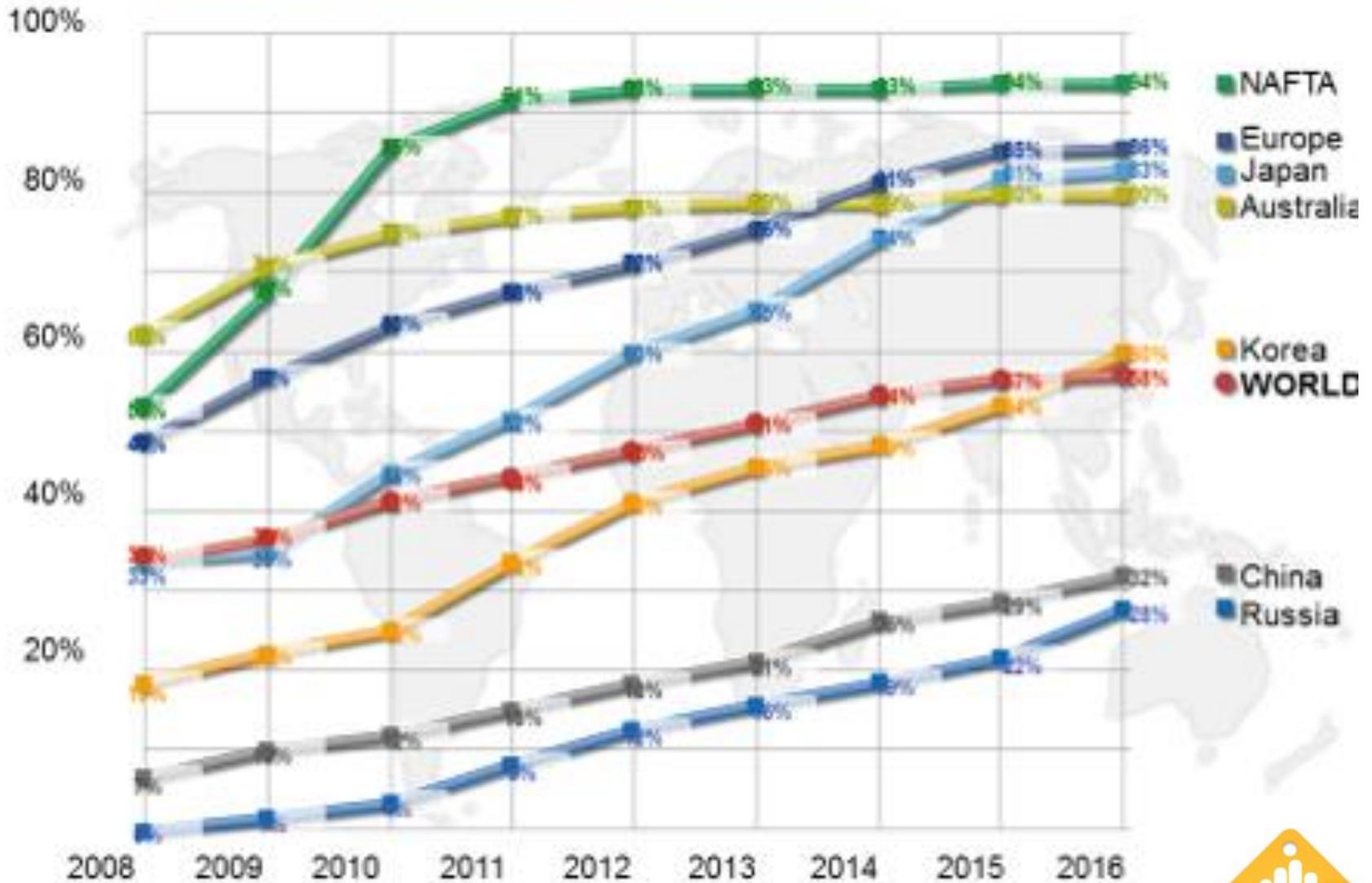
In 2016 from a total of 72 million new cars as many as 20% fail to meet UN minimum safety standards, with weak body shells, and lack air bags, or electronic stability control.



By 2020 Global NCAP wants all new cars to meet UN crash test standards with air bags, and electronic stability control fitted as standard.

This needs government action to apply UN vehicle safety standards more widely and greater effort to stimulate customer demand for safer motor vehicles.

ESC Global Installation Rates to 2016



	Road Map for Safer Vehicles 2020 UN Regulations* for:	All New Models Produced or Imported	All Vehicles Produced or Imported
	Frontal Impact (No.94) Side Impact (No.95)	2018	2020
	Seat Belt & Anchorages (No.16 & 14)	2018	2020
	Electronic Stability Control No.140 (GTR. 8)	2018	2020
	Pedestrian Protection No.127 (GTR. 9)	2018	2020
	Motorcycle Anti-Lock Brakes No.78 (GTR.3)	2018	2020
	Autonomous Emergency Braking Systems	Highly Recommended	Highly Recommended

*or equivalent national performance requirements, with effective conformity of production

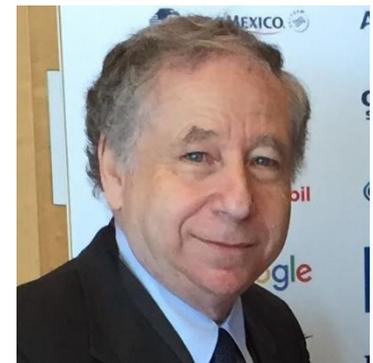
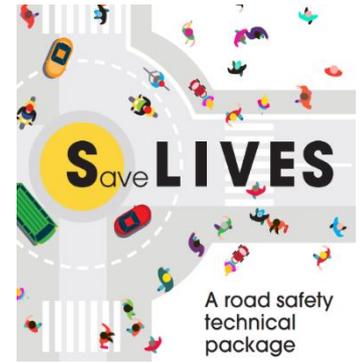
UN Mandate for Safer Cars 2020 – Time for Action

In April 2016 UN General Assembly adopted resolution (A/Res/70/260) which encourages Member States to adopt:

Policies and measures to implement United Nations vehicle safety regulations or equivalent national standards to ensure that all new motor vehicles, meet applicable minimum regulations for occupant and other road users protection, with seat belts, air bags and active safety systems as standard.

The World Health Organization has also just released the Save LIVES policy package that includes recommendations for UN Member States on vehicle safety that are fully aligned with Global NCAP's Road Map.

Michael Bloomberg, WHO Ambassador for NCD's, is calling on vehicle manufacturers to apply voluntarily the UN minimum crash test standards. Jean Todt, UN Special Envoy for Road Safety, is also advocating an industry self commitment to safer vehicles.

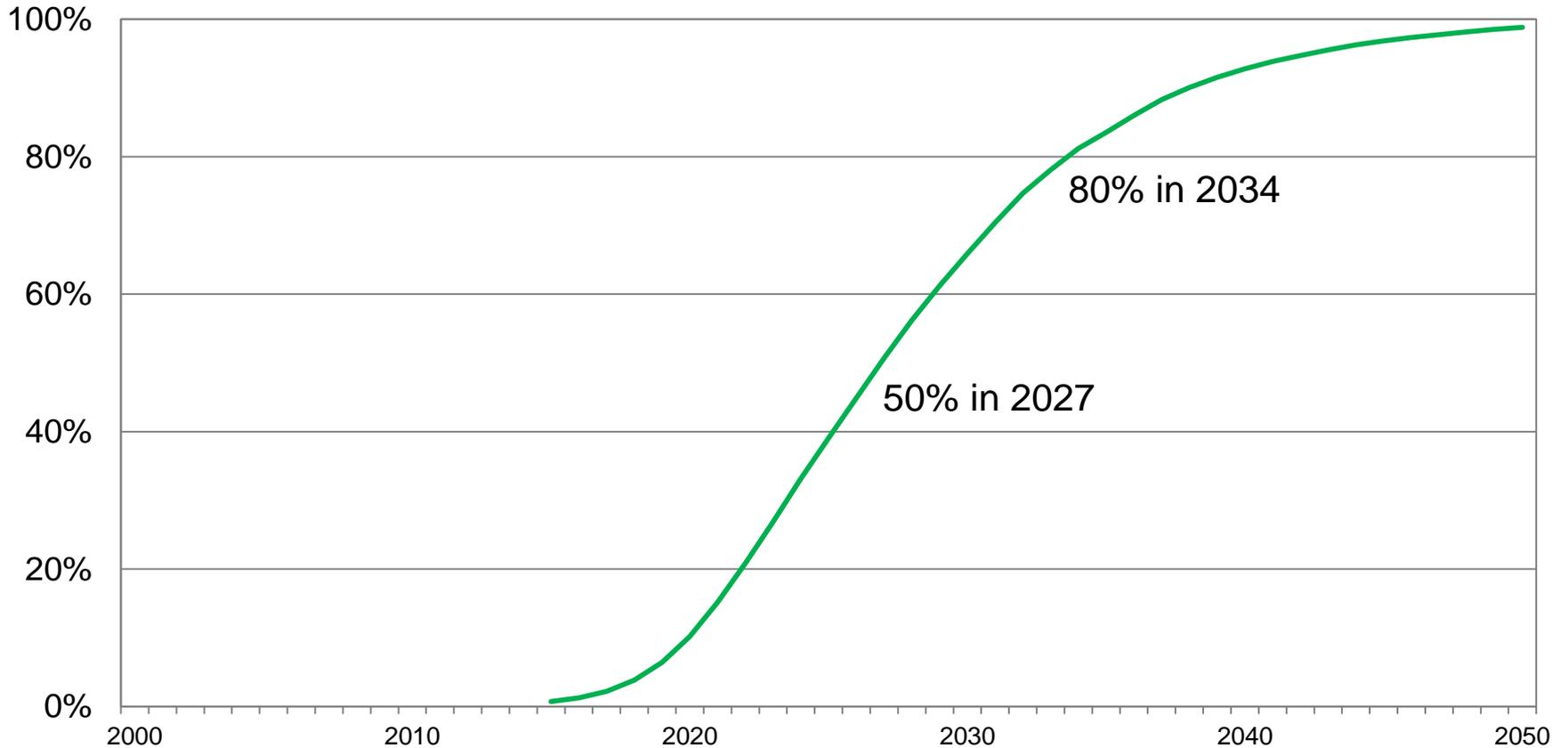


Agenda 2030 – What Are the Vehicle Safety Priorities?

- Accelerate full penetration of ESC across global motor vehicle fleet with further incentive & regulatory actions required in emerging markets.
- Promote Autonomous Emergency Braking, Intelligent Speed Adaption, and Motorcycle Anti-Lock Brakes through a combination of incentive & regulatory action.
- Encourage Fleet managers to choose ‘five star’ safety rated vehicles and act as catalyst for fitment of best available technologies.
- Encourage innovation in Autonomous Vehicles through a permissive regulatory environment supported by evidence based research and independent validation to promote user acceptability



Prediction of US Registered Vehicles with Autonomous Emergency Braking - 2022 Voluntary Commitment



Safety Gains from Autonomous Vehicles...Still Decades Away

Self-Driving Car Deployment Growth

In Millions	2020-2024	2025	2030	2035
Global Sales	0.15	0.25	3.79	11.8
Share of Sales (%)	0.03%	0.23%	3.19%	9.44%
Cumulative Sales	0.15	0.4	10.5	51.4
Share of light vehicles in operation (%)	0.001%	0.026%	0.60%	2.68%

Source: IHS Automotive sales forecast, December 2014; volumes represented in millions.





Thank You!



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