



Market Dynamics in 2026

From maps to
mobility intelligence

Jeffrey Rowen, Vice President, Global Product Partnerships



About HERE

A platform operating at scale



40+

years of experience in map-making and location technology

166bn

API calls per month

1.5k

Enterprise customers – from auto-makers and tech leaders to global logistics and telecoms brands

222m+

vehicles shipped with HERE data and solutions

600k

direct developers

70+

Automakers use HERE data and solutions

Today we work with

accenture

AISIN

Alibaba.com

AT&T

Atos

Audi

aws

Baidu 百度

BOSCH

BMW

Coca-Cola EURO-PACIFIC PARTNERS

Cognizant

Continental

DESCARTES

EROAD

esri

experian

Ford

FUJITSU

GARMIN

Glympse

GOODYEAR

GeoTechnologies

Hapag-Lloyd

Hitachi Solutions

HYUNDAI

ISUZU TRUCKS

JLR

LOTUS

lyft

Mercedes

MASTER CONCEPT

Microsoft

Mitsubishi Corporation

NOKIA

NTT

ORACLE

ORTEC

pactera

PASCO
Surveying the Earth to Create the Future

Pioneer

SAP

SCANIA

SIEMENS

tcs TATA CONSULTANCY SERVICES

TATA POWER

Tech Mahindra

Telefonica

Telkomsel

Tencent 腾讯

Uber

verizon

VINFAST

vodafone

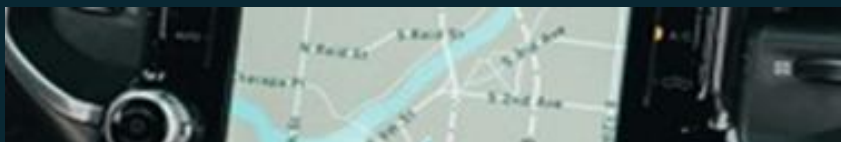
wipro

Zoomcar

Maps are changing...

Gen 1

Download Era



Where we have been

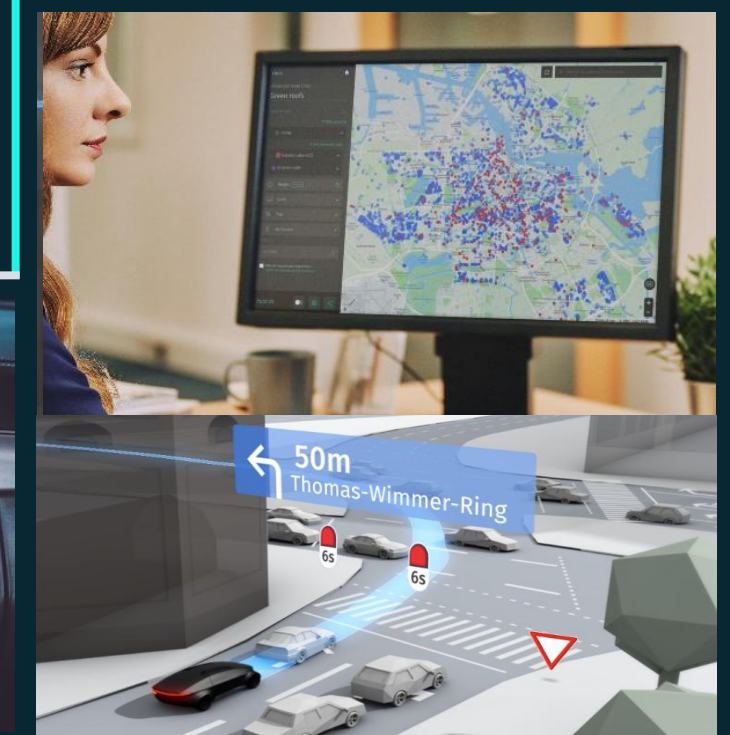
Gen 2

Streaming Era



Gen 3

AI/Live Era



Where we are going

AI, where are we going?

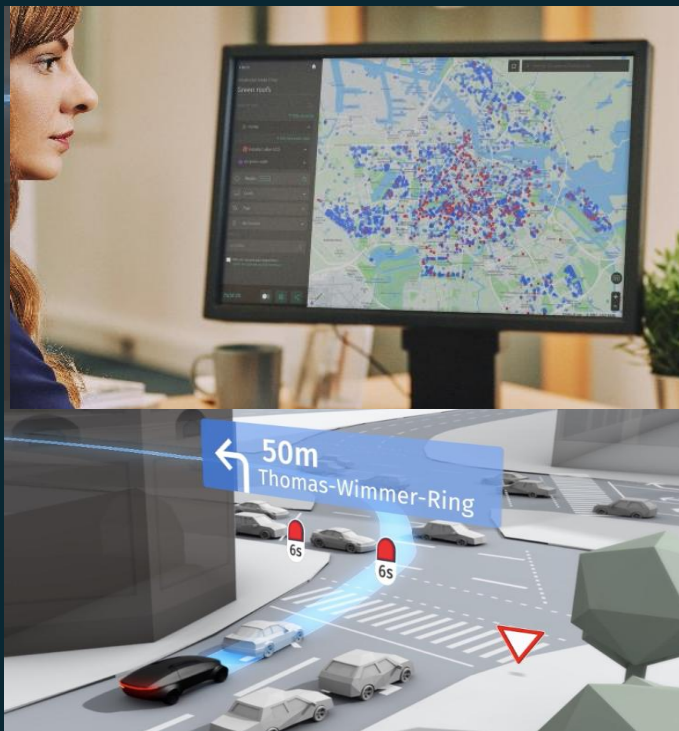
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Maps are changing to Live, Self-Learning & Autonomous

Gen 3

AI/Live Era



For optimization of the movement of people and goods



For simulation and scenario planning



For the Artificial Intelligence (AI)

Where we are going

HERE solutions support use cases across many industries



Automated driving



EV routing & charging



Professional navigation



Monetizable services



Fleet routing



Asset tracking



Streamline operations



Digital cockpit



Location analytics

2026 Dynamics in the Enterprise Location Market

Key market trends shaping Location in 2026

01 AI Powered Orchestration

Reactive execution transforms to autonomous & continuous orchestration

02 Agentic AI everywhere

Agentic tech evolution enables enterprise workflow automation

03 Autonomous mobility is arriving

Robotaxi Deployment

04 Simulation First Operations

Scenario modelling & simulation before physical execution & implementation

05 Physical AI & Urban Delivery Reset

Robotic curb-side delivery & last-meter intelligence reshape customer expectations

The Enterprise Location Intelligence Market

Market movements

AI & Automation

AI-powered & AI
enabling

Electrification

EV-aware
portfolio

T&L M&As

Scalable location
solutions

Sustainability transition

Proven impact:
↓ emissions,
↑ safety



Agentic AI everywhere

What's going on?



www.fleetequipmentmag.com

Agentic AI is resetting enterprise software economics (T&L, CRM, other SaaS)



Agentic AI is turning cars from responsive machines to context-aware copilots



Agentic AI becoming pervasive in the digital life of the consumer

Why Agentic AI for Transport and Logistics?

From static workflows → to reasoning-driven operations

TMS / Middle Mile

Static planning. Manual decisions. No intent awareness.



Fleet Management

Signals everywhere. No real-time reasoning loop.



Last-Mile

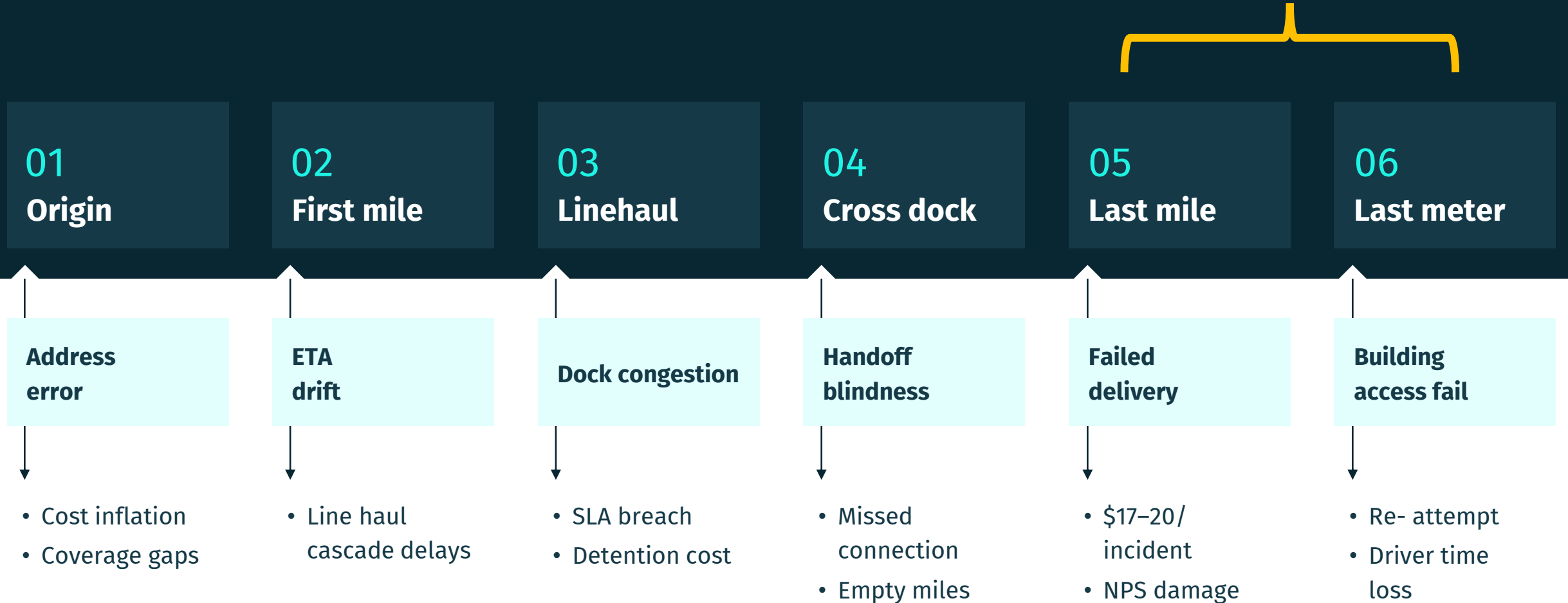
High variability breaks rule-based automation.



Every point in Logistics has known failure points

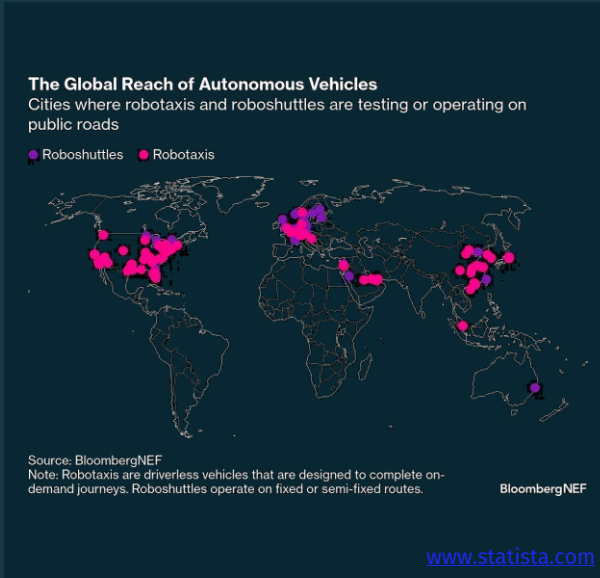
6 places where value leaks

50% of all costs in the supply chain happen here

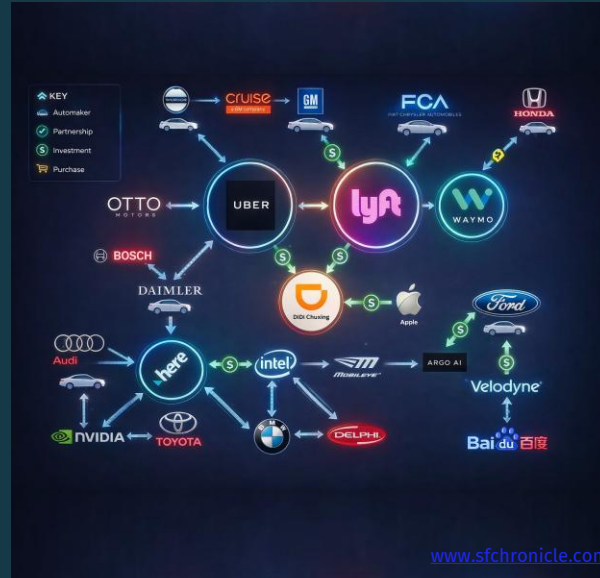


Autonomous mobility is arriving

What's going on?



Established and new entrants scaling robotaxis globally (finally!)



Collaborations between tech developers, rider platforms, and OEMs are taking shape



Progress in L4 technology is reaching private users through new AI models

Autonomous mobility is arriving

*L2++ is new level of automation that delivers L3-like functionality but is more scalable, according to OEMs

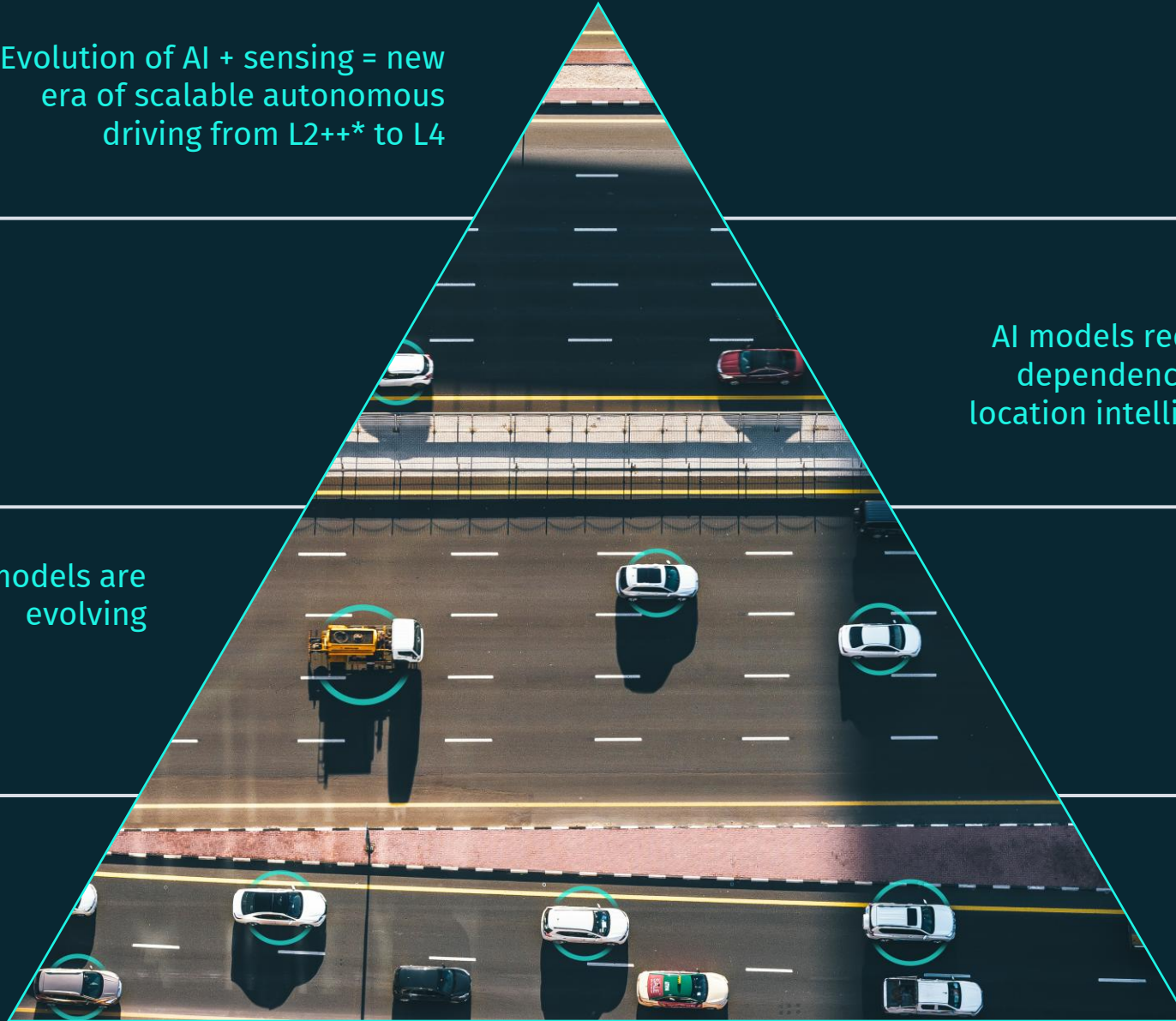
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What to Know

Evolution of AI + sensing = new era of scalable autonomous driving from L2++* to L4

AI models redefine dependencies on location intelligence

Business models are evolving



AI will accelerate solutions and roadmaps



"Because you're out of imagination. For companies with imagination, you will do more with more. For companies where the leadership is just out of ideas, they have nothing else to do, they have no reason to imagine greater than they are then when they have more capability, they don't do more."



Jensen Huang, CEO

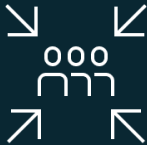
NVIDIA

HERE & Korem: Aligned with market trends

And...



Imagination



**Customer
Centricity**



**Portfolio Depth
and Innovation**



**Advanced Use
Case Focus**



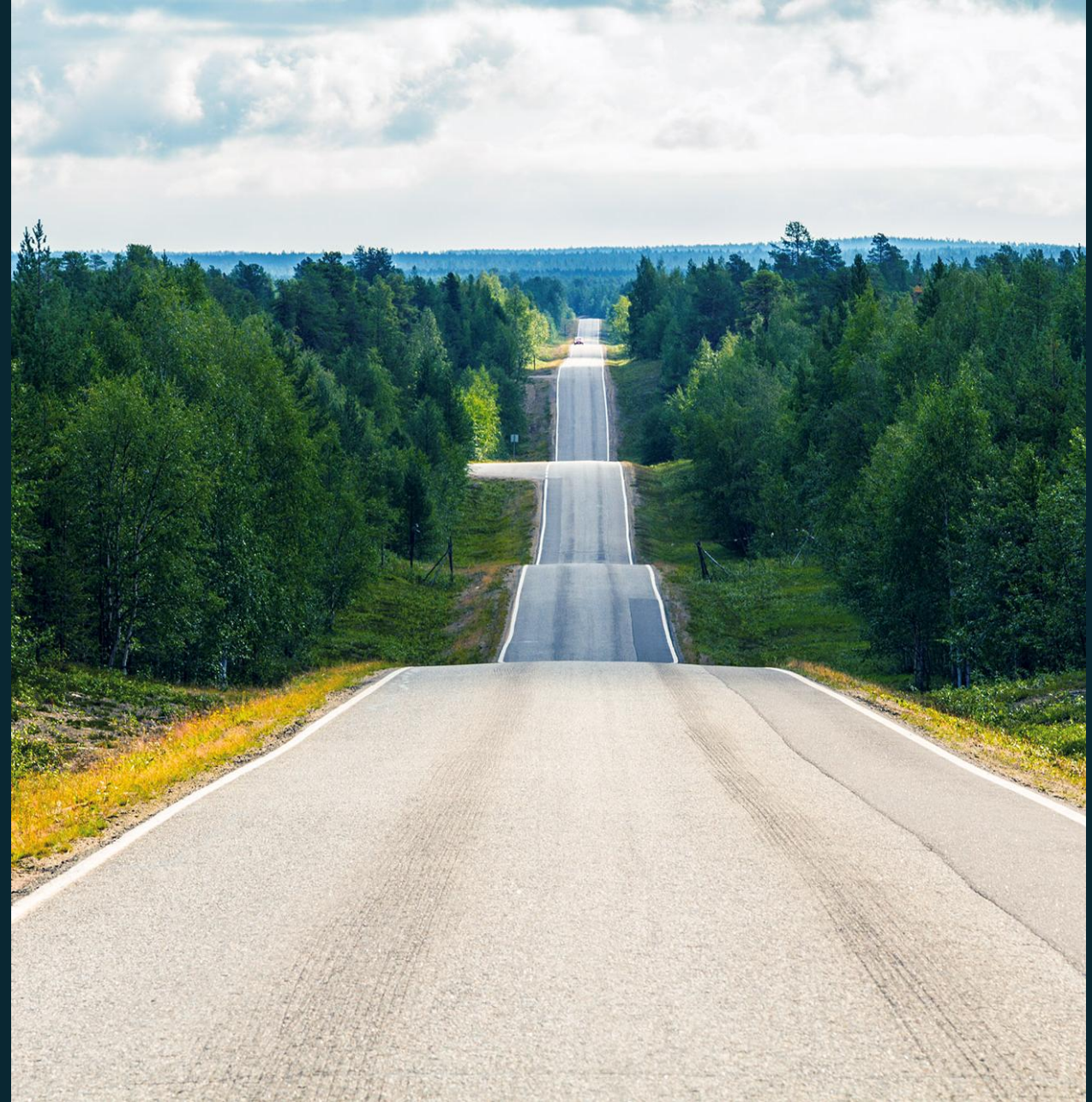
**Solution
Flexibility**



**Strong Location
and AI DNA**

In conclusion

- 1 Enterprises are shifting from reacting to orchestrating
- 2 Location intelligence is now a living decision layer
- 3 AI raises expectations and complexity
- 4 Running maps and simulations is now strategic
- 5 **HERE and Korem are uniquely positioned to lead the way**



Thank you

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