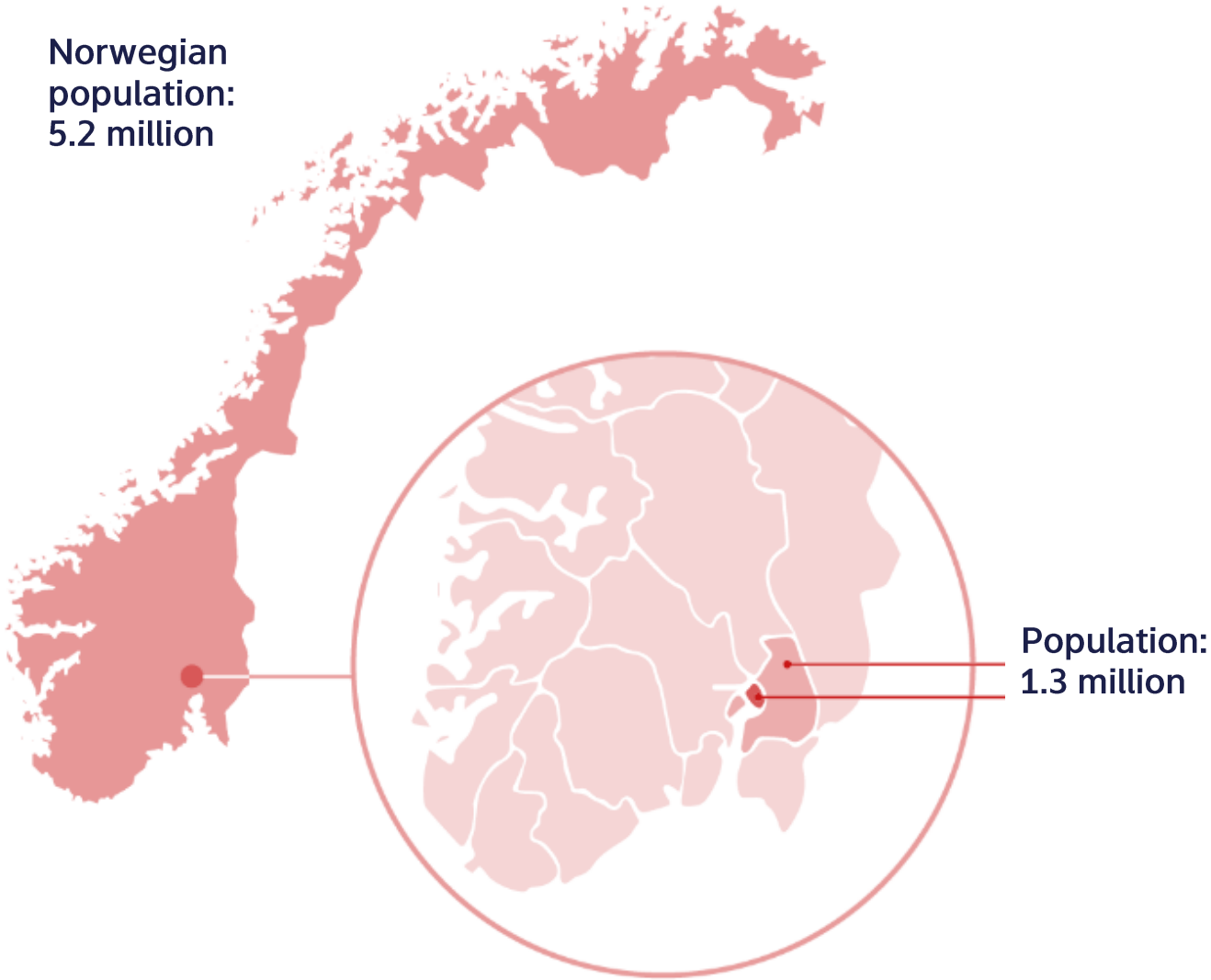


Beyond Autonomy – Transform the Way We Move and Live in Our Cities

The public transport authority in the Norwegian capital region



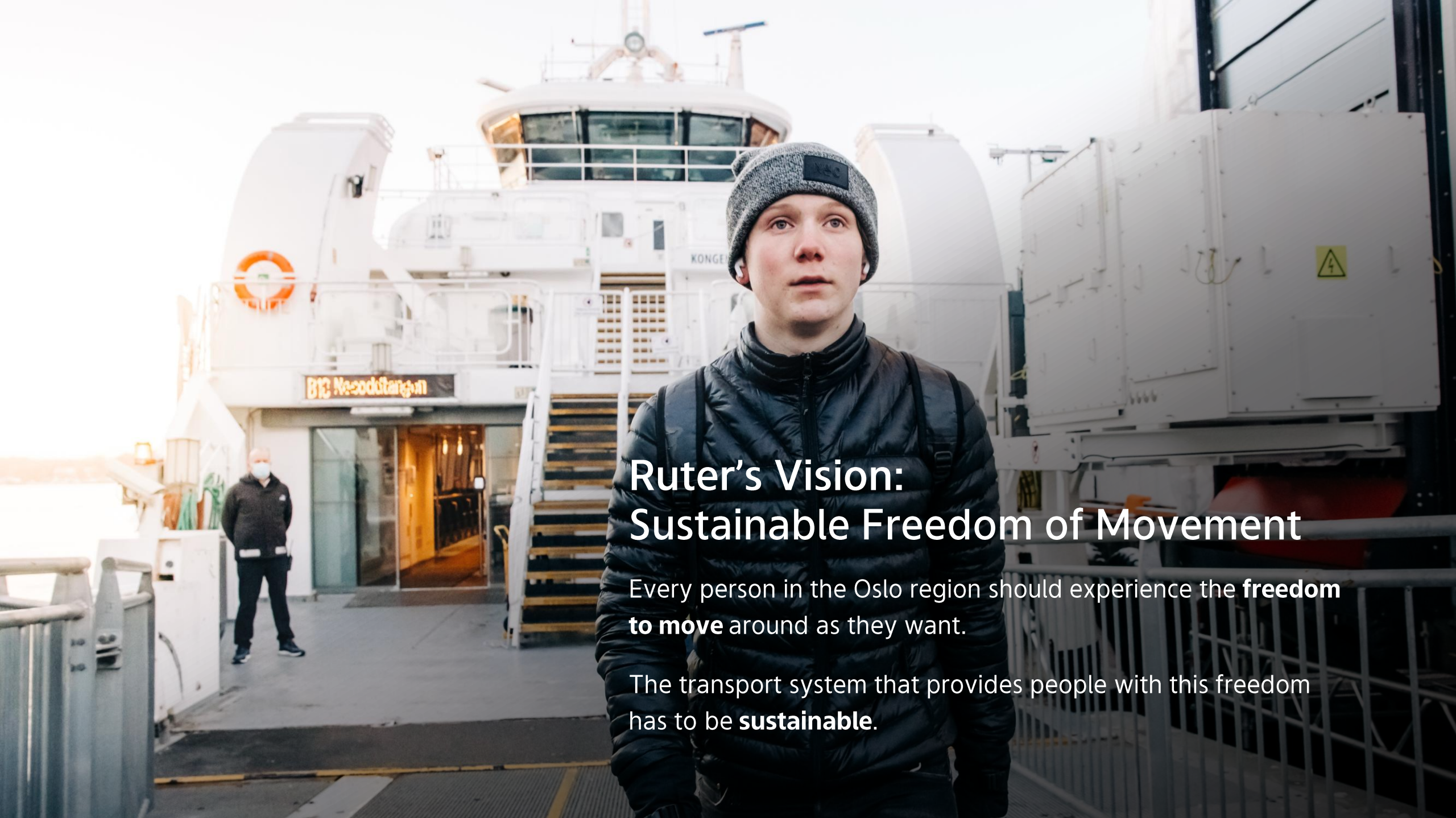
Owned by the municipality of Oslo (60%) and Akershus county (40%)

395 million boardings in 2024

Oslo aiming for 95% emission reduction by 2030

Favorable political, financial and digital conditions for PT

Ruter's zero emission goals for Oslo were reached in 2024

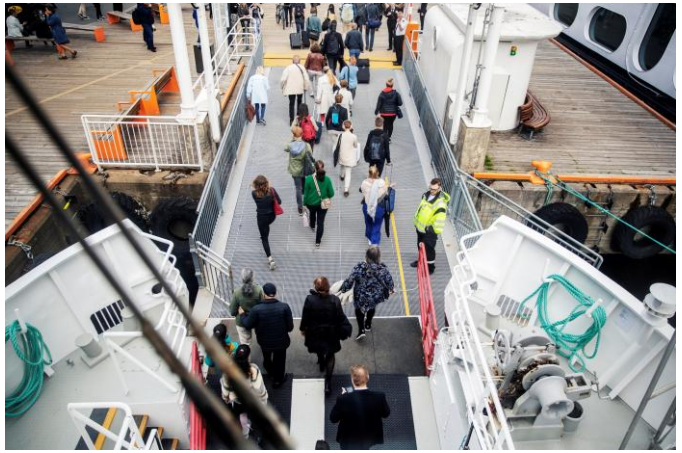


Ruter's Vision: Sustainable Freedom of Movement

Every person in the Oslo region should experience the **freedom to move** around as they want.

The transport system that provides people with this freedom has to be **sustainable**.











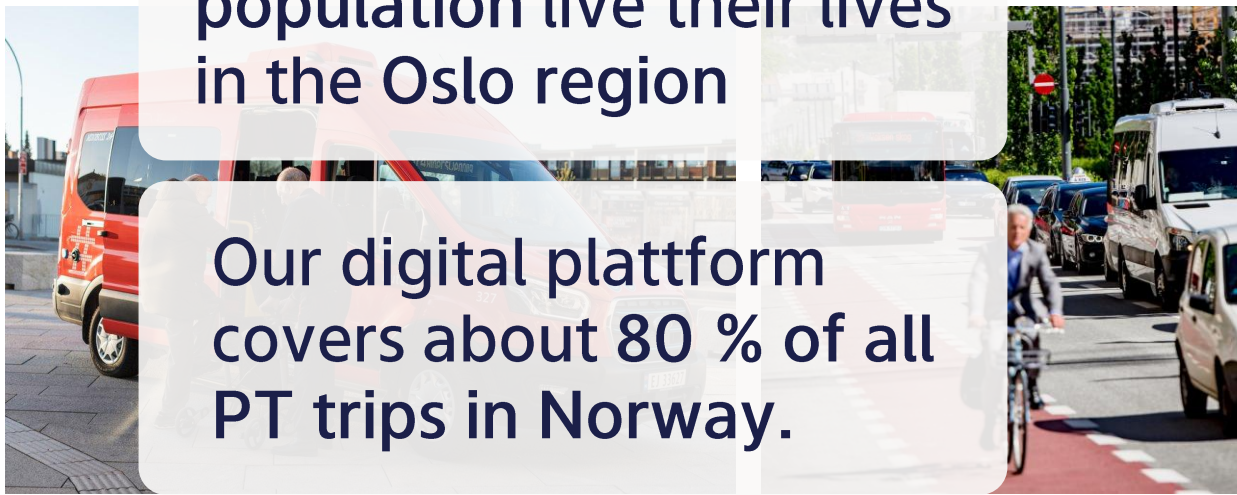












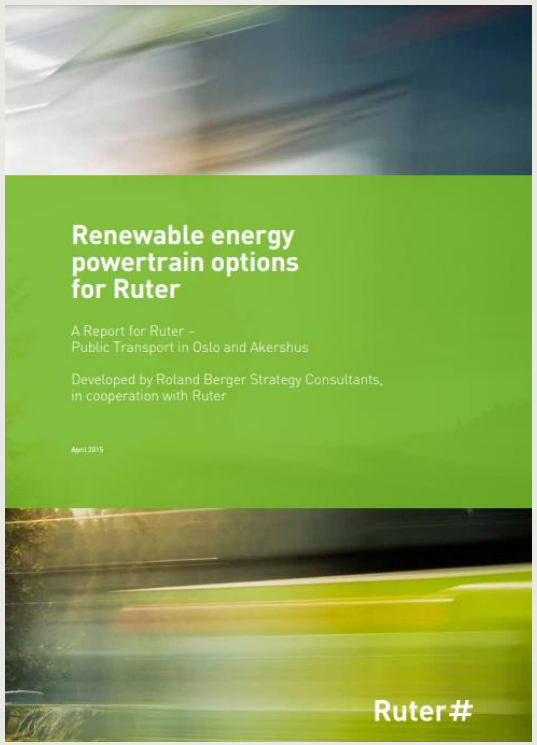
Over 40 % of Norway's population live their lives in the Oslo region

Our digital plattform covers about 80 % of all PT trips in Norway.

Execution from our why to how- we have done it before!

Reached zero emission goals four years ahead of target
By leading the change, rather than wait for market maturity

2015: Renewable energy public transport in 2020



2024: Ruter's zero emission goals for Oslo was reached (including buses, ferries, trams and subway)





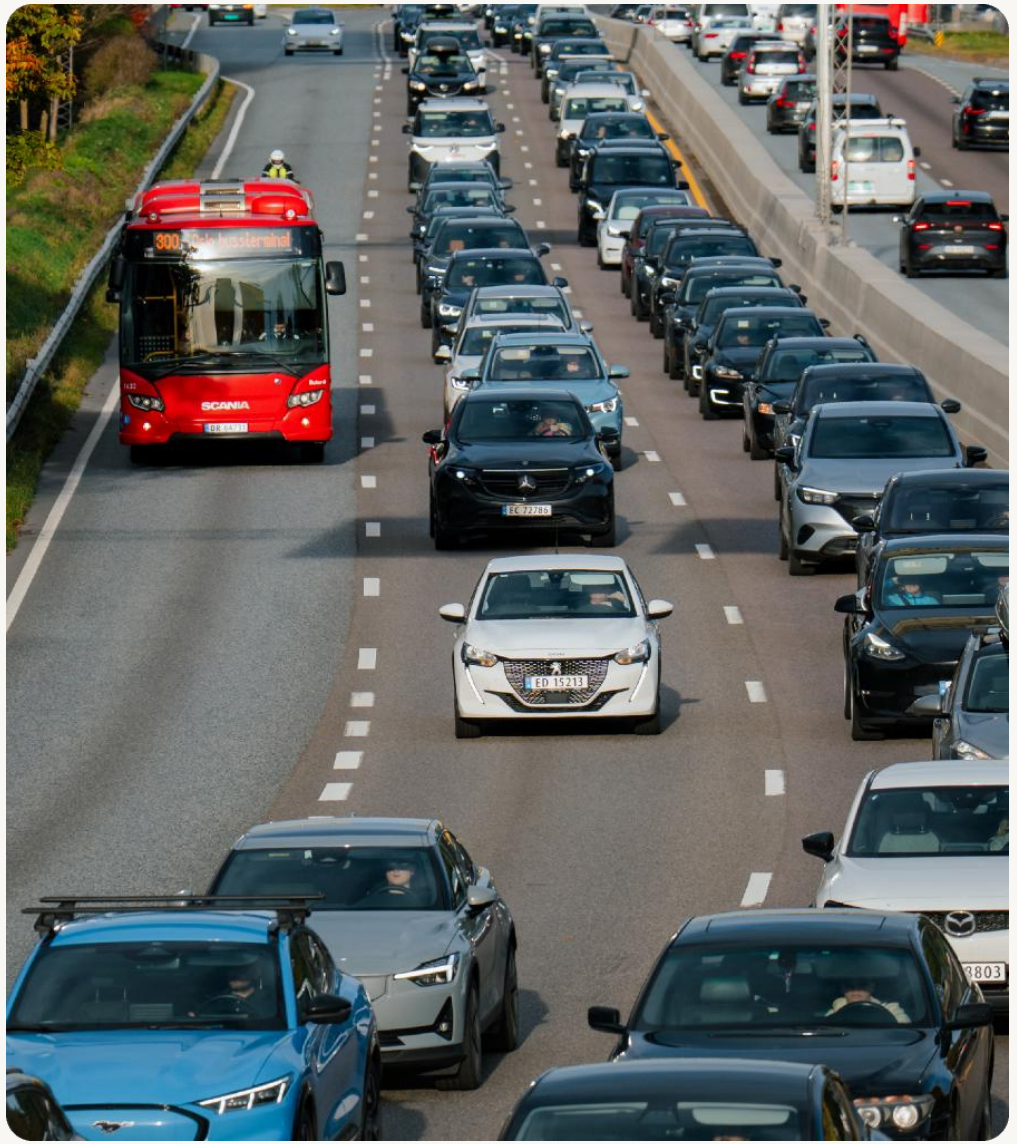
«Sustainable freedom of movement»

The private car is becoming increasingly personalized and attractive



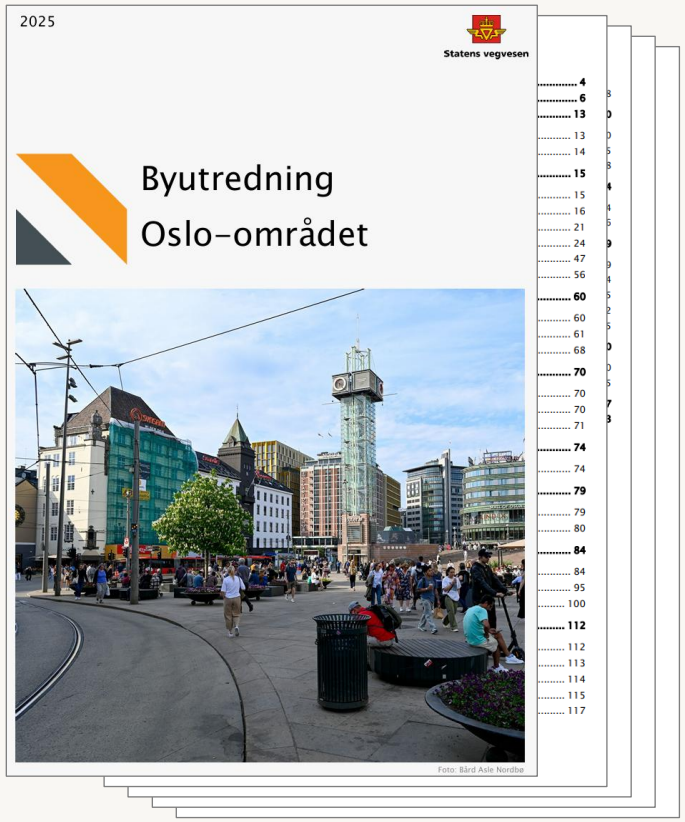
The challenge for our cities

- Electric car owners drive 5–15% more than fossil fuel car owners
- In rush-hour traffic into Oslo, cars carry on average only 1.1 persons.



Why is Ruter working on autonomous mobility?





Source: Norwegian Public Roads Administration et al. for the Ministry of Transport, Byutredning Oslo-området (2025)

Even with all planned measures, passenger car traffic is expected to exceed the zero growth target by **11%** in 2036 and **18% in 2050**

It is not enough to continue as before.

We are in a transformation!

2026 is the year self-driving taxis come to Europe



A pooled autonomous service helps solve a number of today's challenges in cities

In the US, Waymo argues that they contribute to safer roads and a faster transition to electric cars

Self-driving in the form of competing privately owned robotaxi fleets will result in increased traffic and lower ticket revenues for public transport operators

Today, there is an average of 1.1 people per car in rush hour in the Oslo area. If we manage to increase this to 1.6 - 1.9, magical things will happen

Mulige gevinster	Robotaxi	Pooled self-driving
Increased road safety	✓	✓
Premium Services	✓	—
Electric Vehicles	✓	✓
Increased mobility for all	—	✓
Reduced traffic congestion	—	✓
Reduced CO2 emissions	—	✓
Regulatory risk	—	✓

1) SAV = Delt selvkjørende kjøretøy (Shared Autonomous Vehicle)

There is consensus regarding the rise of shared AVs for urban mobility in Europe…



…and everyone comes to the **same conclusion**

[All reports can be found here:
The Oslo study]

Our take on the market;
Shared Autonomy will lead the AV market, **assured by its environmental and social gains**

The research is clear;
Shared autonomouse services Delivers Profound Benefits for the Society and the Environment

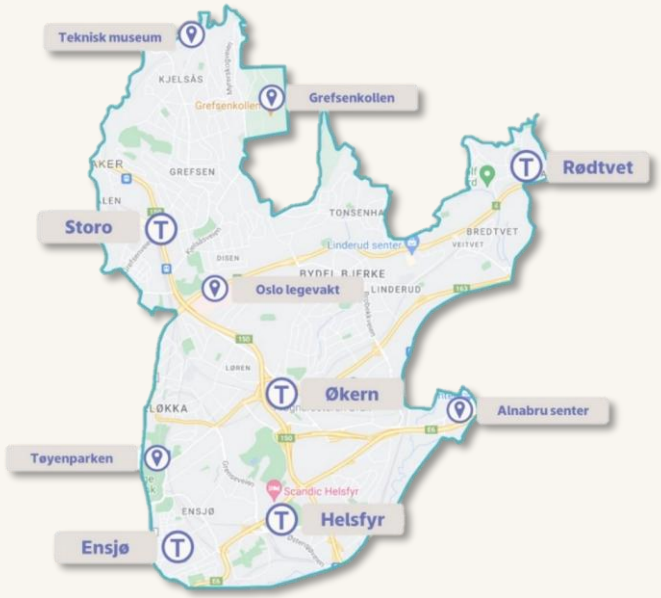
…..Robotaxi does not

#

Consistent Strategy Since 2017

HENT – DRT Service with driver





Autonomous DRT Service





Scaling from the core – stop building new micro contracts!

Micro islands: a new service wherever cars are idle

Own contracts, own launch, own customer onboarding
Few trips to match → low pooling rate
Data and customers in silos → low optimization and utilization

Circles: Hent grows contiguously



From the core:
Kværnerbyen
Korsvoll and Tåsen
Alfaset and Trosterud

...And Beyond

More trips to match → higher pooling rate
Lower cost per trip and better customer experience
Each new zone strengthens the data for the next

Expansion areas: ruter.no/aktuelt/produkter/hent-utvides (8 Dec 2025)

From ticket-centric to journey-centric customer experience



Today the customer understands the network. In the future the network understands the customer.

Private car

The car spares people planning, waiting and uncertainty.

Walk to the car → Drive → Park

Public transport today

The customer adapts to the transport system.

Plan the trip → Check timetables → Choose modes → Buy a ticket → Handle disruption

Hent autonomous service

One interface across fixed-route and flexible mobility.

Tell the system where and when. → Plans | Books | Guides | Adapts | Pays

Done by the customer

Done by the system: it plans, books, guides, adapts and pays

Source: Ruter industry briefing 12.01.2026; Ruter white papers "Roadmap to 500 AVs" (Jul 2025) and "The economics of a shared autonomous on-demand service" (Dec 2025)

The future autonomous customer journey

1 **NEED**
"Be there at 08:30"

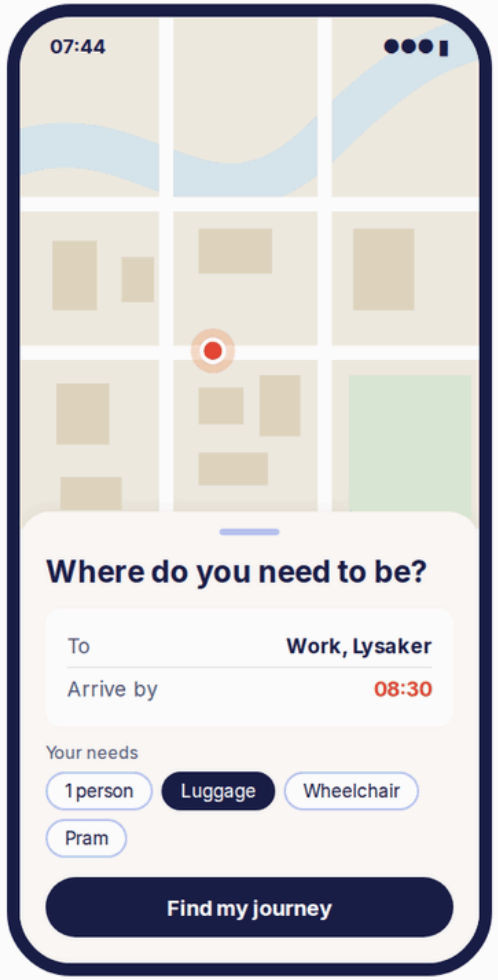
2 **MATCH**
Best journey proposed

3 **PICK-UP**
0–200 m for most

4 **RIDE**
Shared by default

5 **CONNECT**
Transfer coordinated

6 **ARRIVE**
Payment in background



WHAT THE PLATFORM DOES

Reads destination, arrival time and needs

The customer sees one simple journey. The platform manages the complexity underneath.

PLAN • BOOK • GUIDE • ADAPT • PAY

Source: Ruter industry briefing 12.01.2026; Ruter white papers "Roadmap to 500 AVs" (Jul 2025) and "The economics of a shared autonomous on-demand service" (Dec 2025)

Building the platform for tomorrows on-demand services

Aggregating demand from private vehicles

TODAY

Hent

On-demand transport integrated in the Ruterapp.

On-demand transport in Akershus

Lines where there is no regular route. Book by phone by 17:00 the day before.

School transport

Free transport for students with a long journey to school or special needs.

Accessible transport

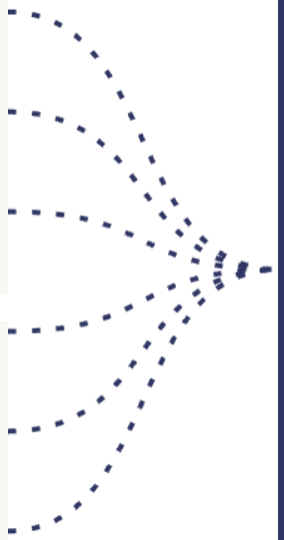
For people whose disabilities prevent them from using regular public transport.

Age-friendly transport

On demand transport for elderly. Book by phone on the same day

Carpooling

Share the ride with others going the same way.



TOMORROW

Hent

On-demand platform

One orchestration layer

Customer need | Booking | Matching

Routing | Operations | Data & AI



More butts in the seats!

Ordered and paid in the Ruter app

24/7

Always within reach

Designed for carpooling

Scaled through self-driving technology

Key Service Design Criteria and Ambitions



Ridesharing (pooling)

Fundamental to get reduction in kilometres driven, which drives benefits as well as business case



Operate as one integrated fleet

Competing fleets will not reduce kilometres driven, hence not generate benefits



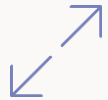
Integrated with public transit

Key to complement to maintain reduction in kilometres driven



Replacement of private car journeys

If this is just a complementary service, it will not provide key sustainability benefits



Large scale needed

Both to provide reliable private car replacement service and to be attractive investment case



Subsidy free service

Self sustainable service – key to scaling



We are part of a global ecosystem.

Unifying Europe….

Shared need for new solutions across countries

100+ Meetings conducted with different cities, all of them confirming **SAV solutions fit their mobility strategy**

19 European Cities have **signed our LOI**

7 Workshop- City **Rollout concept plan** (RPC)

The EU market have confirmed our hypothesis with broad interest in **tendering for a SAV service**



…To aggregate a large demand

Vehicle manufacturers are taking positions – expecting more purpose-built vehicles over the coming years

Examples

On demand

Vehicle platform

GAC GROUP



北京汽车 BAIC MOTOR



HYUNDAI



TESLA





ZEEKR



Digital driver

WeRide

pony.ai

Motional

AVRIDE



TESLA

mobileye



Fixed route

Vehicle platform

HOLON



TECNOBUS



KARSAN



ZOOX



Digital driver

mobileye

Max 60 km/h

May Mobility

ADASTEC

Max 40 km/h – working on the permit

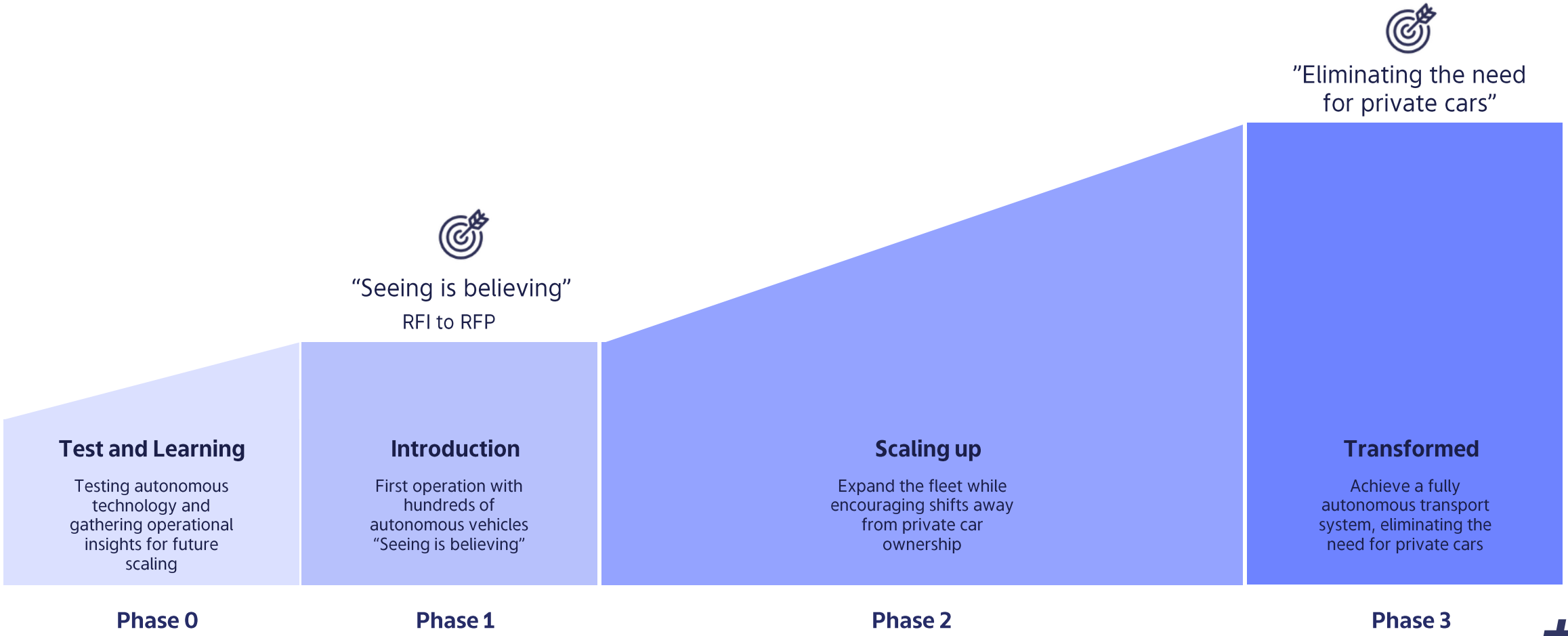
ZOOX

Next step

Ruter#

A Transformation Across Multiple Phases

Ruter's strategy for on-demand transport based on autonomous driving



We invite you to take part of the process!

Recording of industry briefing

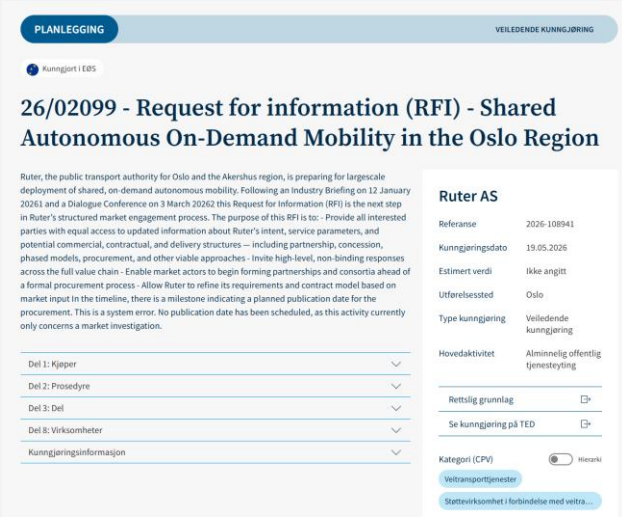
Watch a recording of the digital industry briefing, that was held on January 12th 2026.



Industry Briefing: Preparing for Shared Autonomous On-Demand Service in the Oslo Region

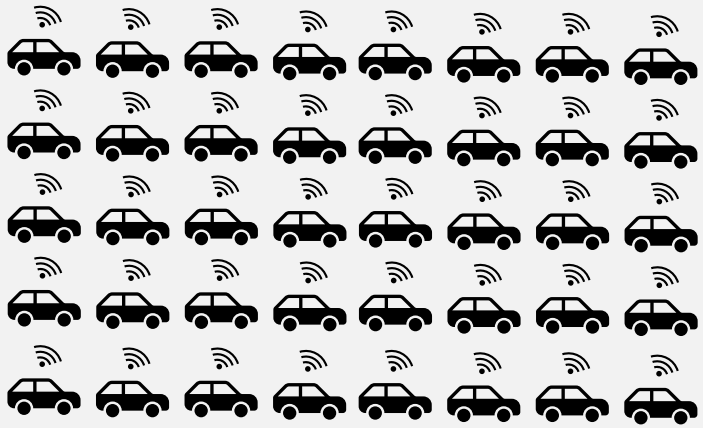
Ongoing:

RFI process



Next step:

RFP for a service of 500 SAVs





Questions?

liisa.andersson@ruter.no

