

**MODYN**

design that moves

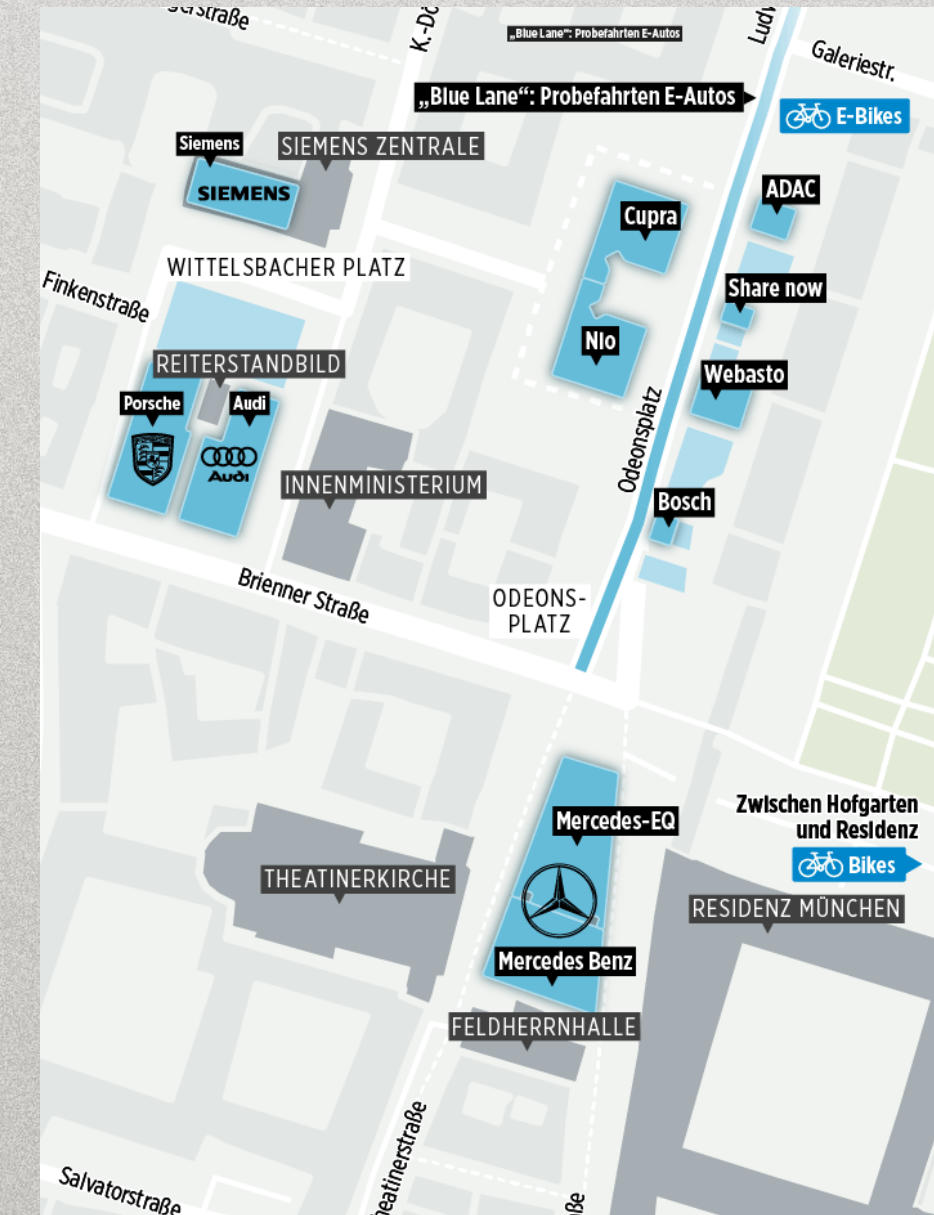
**IAA  
Mobility  
2023**

# The IAA 2023

The IAA, held every two years, is no longer the exclusive realm of the automotive industry but instead covers the whole mobility spectrum, from micro-mobility to autonomous shuttle buses.

With 750 exhibitors from 38 countries and over 300 product debuts, there was a lot to see for the half a million visitors. Notably, some exhibits were not limited to the traditional grounds but were spread throughout Munich's historic city centre. This unique setup saw major brands erecting expansive multi-level exhibition stands amidst the city's historic architecture. Unlike the conventional exhibition halls, the city centre was open to all, creating a dynamic mix of visitors—ranging from the young to the old, professionals to casual enthusiasts. It was a vibrant environment pulsating with enthusiasm for mobility, prompting questions about the necessity of traditional exhibition spaces.

The outdoor exhibition stands did a great job enforcing the OME's brand message and supporting their new arrivals. Notable highlights were the red box by Mercedes, where they launched the CLA concept car. The Porsche stand with a giant 911, and the MINI stand screamed MINI from every little detail.



# Index

Unsurprisingly, electric cars took the spotlight, although not an accurate reflection of the marketplace today, they are solidifying their transition from a trend to the industry standard over the past decade and towards the next. Every brand was either expanding their EV offerings or giving their existing EV's a refresh and technical update.

The presence of numerous Chinese brands was also no surprise. Some were already familiar faces in the European market, while others were making their debut, eager to gather feedback and make an impact. Chinese product line-ups showcased maturity, intriguing innovations, daring avant-garde styling, and a focus on CMF (Color, Material, and Finish).

Speaking of CMF: As brands across the mobility spectrum strive to convey their unique brand message and stand out, CMF has gained significance in defining brand identity and differentiation. To our delight, we witnessed a profusion of bold CMF themes, novel materials, and intricate details.

But there's more to uncover. In the following pages, we'll delve into our insights and key takeaways from the show.

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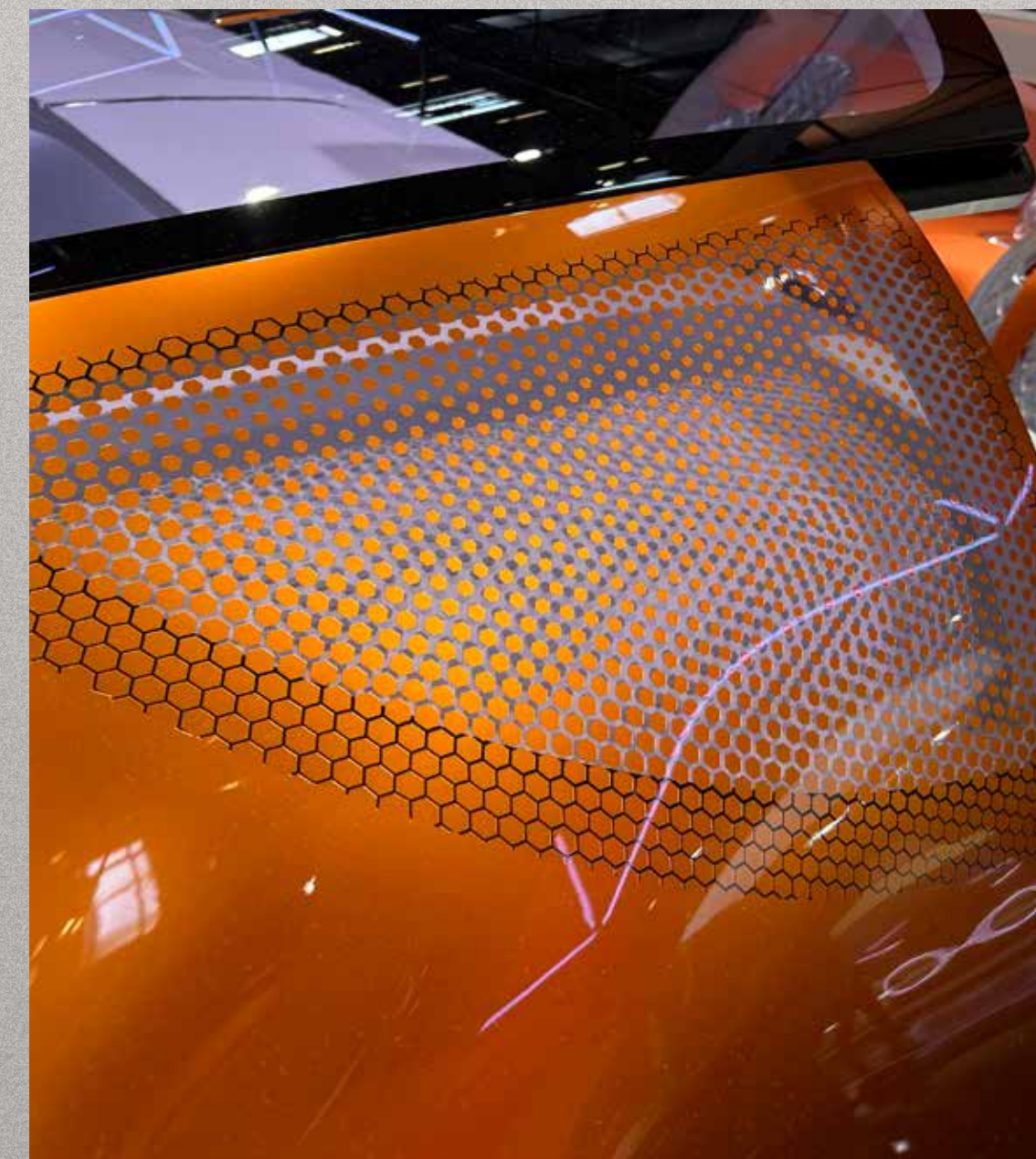
# Brand Highlights



# Mercedes Benz Vision One-Eleven

This eye-catching design drew heavy inspiration from the iconic C111 Prototypes, proving that retro design isn't quite dead. What truly captivated us was its mesmerizing exterior, coupled with the interior's dazzling silver seats. However, it's unlikely that silver leather will make it into our future interiors; this almost space-age CMF does feel in line with Mercedes's use of chrome and bling of late but also feels like a step too far.

The LED pixel exterior graphics, dashboard UI, and distinctively shaped rectangular steering wheel are also worth noting.



# Volkswagen

## ID.GTI

The Volkswagen ID.GTI Concept is notable because it is VW's first attempt at transitioning its legendary GTI label from ICE to EV. We are curious to see how other brands will define sportive elements in an EV context; this concept seemed to borrow a few design clues from their ICE GTI cars, such as the honeycomb grill and a rear diffuser.

We loved the exterior proportions, the consistent use of red accents and the clean dashboard.

## PASSAT B9

A new Passat, once a significant highlight, now competes in a world ruled by SUV's and EV's. It attempted to align with VW's new design language while distinguishing itself from EV's with a prominent bumper grill, unmistakably unmasking itself as an ICE car.

Surprisingly, the exhaust tips were concealed, indicating a shift in how performance is expressed; prominent exhaust tips are perhaps no longer a desirable and even accepted feature.





# Porsche MissionX

What could the future of sports car aesthetics look like? Porsche offered a glimpse of their vision through the MissionX concept, staying true to their legacy of luxury and sophistication.

The car's refined exterior features sleek design lines complemented by carbon accents and striking, bold lighting. Porsche's presentation hinted at a harmonious fusion of tradition and innovative design.





# Cupra DarkRebel Concept

It felt otherworldly as if it had sprung from a meta-verse. Each line seemed to be drenched in immense passion, and the design defies conventional car norms with its revolutionary aesthetics and performance. It stands as the inaugural vehicle entirely conceived within CUPRA's virtual realm, tailored for the drivers of the future. Its smooth contours, accentuated by precise lines, exude vitality and determination, all enhanced by a transformative dark violet hue that adapts to the surrounding light conditions.



# Opel's Experimental Concept

This captivating design gives us a glimpse into Opel's (and Vauxhall's) evolving style now under the Stellantis umbrella, which eschews traditional chrome elements in favour of striking exterior lighting and bold graphics. Its aerodynamic exterior, well-lit and spacious interior, lightweight seating, the seemingly opaque side windows and the seamless integration of 180-degree cameras in place of traditional wing mirrors all contribute to making it a truly distinctive and unique creation. Something truly unique!

One thing we found puzzling, the Experimental Concept or any of the other Opel concepts featured at the show had the updated logo's applied; surely a concept car would be the first to proudly display the new logo in the new grill?





# BMW's Vision Neue Klasse

**Exterior:** This concept was the talk of the town, seen as an insight into BMW's new design language with a subtle nod to the past; it breaks with a few of the controversial features of today's BMW's. The large kidney grill from the iX makes place for an elegant full glass "grill" that also houses a new take on the distinctive double headlights.

The exterior surface treatment is reminiscent of the 2008 fabulous GINA concept and has a clean, stretched paper feel. The shark nose front end with a front diffuser-like bumper feels very appropriate; the proportions at the rear probably need a little getting used to. BMW experimented with a low greenhouse and boot, and it's interesting to see that BMW hasn't given up on the saloon shape, although reports indicate that the actual production car, based on the Vision Neue Klasse will be a SUV.





## BMW's Vision Neue Klasse

Interior and CMF: Blending sustainability, electrification, and digital vibes. Notable are the yellow corduroy seats and trim panels with contrasting white surfaces and the head-up display that extends across the entire windscreen and provides information at the ideal height for the driver AND the front passenger. A developing trend we see more and more.

To underline the circularity of the used materials, BMW continues to show us exterior plastics with different coloured chips; this is an exciting trend we feel will end up in a production car and other products at some point and could even be a prominent trend.

Last but not least, BMW showed another iteration of their e-ink exterior. It's still very rough and unrefined, but it continues to be an intriguing concept.





# Mercedes-Benz Concept CLA Class

Evident from the lavish red multistory building erected for the express purpose of showing off this concept (see page 2) and the impressive light show inside, this is a very important future product for Mercedes Benz, hinting at an entry-level EV for the brand.

Where others are shying away from the use of shiny bling, at Mercedes, we saw a doubling down of the use of shiny materials in both interior and exterior. We were especially impressed with the gradient between the LED lights and the chrome strip; this was masterfully done, and we may see that in other products in the future.

The repeated use of the Mercedes star logo in patterns featured across the exterior and interior does raise the question. Is there a danger of devaluing the power of a logo by overuse?

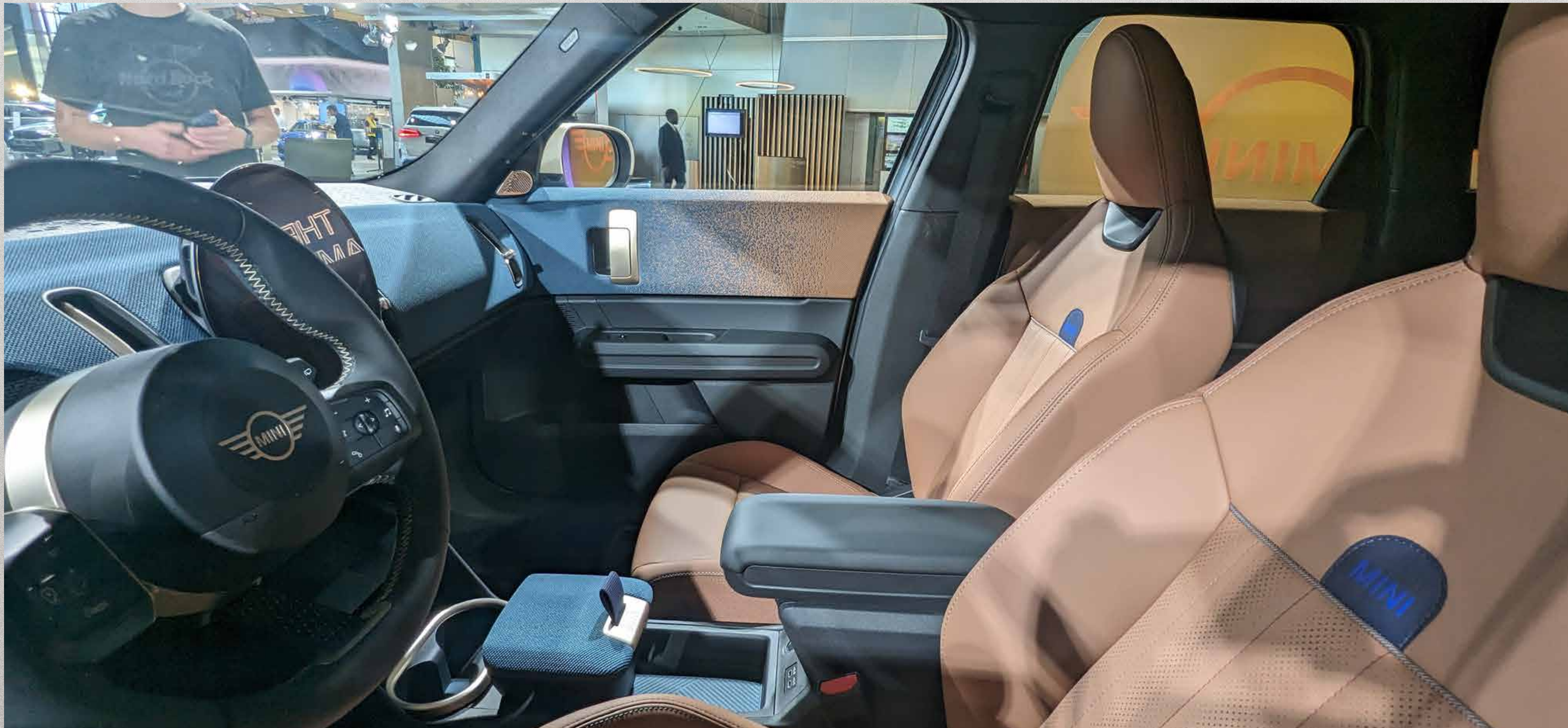
A dark blue Audi Activesphere concept car is shown from a front-three-quarter view. The car has a sleek, aerodynamic design with a prominent Audi logo on the front fender. The background shows a blurred exhibition space with other cars and people.

# Audi Activesphere Concept

The Audi Activesphere concept immediately grabbed our attention. Positioned as the flagship in Audi's sphere line-up, which includes the Skysphere, Grandsphere, and Urbansphere, this crossover coupé seamlessly blends luxury with versatility.

With its polished looks, 22-inch wheels, and an adaptable Sportback rear, it's well-equipped for urban commutes and off-road adventures.

What sets it apart is its ability to transform from a sleek coupé to a spacious pickup, even accommodating e-bikes. In short, Truly, it's the epitome of stylish versatility!



# MINI

Possibly our top pick. MINI was on another level; they expressed their brand's story in every detail with extreme consistency, from CMF to UI and exterior and interior styling. The all-new countryman was an excellent example of this.

We liked the use of fabric loops as latches and colour gradients, which we saw throughout the show.





# TESLA

Tesla often avoids large expos in favour of hosting its own events, but at the IAA, Tesla had a modest presence with stands inside the hall and in the city centre.

At the event, they showcased the updated Model 3, and the noticeable improvement in the often-criticized “fit and finish” of the vehicle was quite evident. Although modern, we thought the headlights were perhaps a little too conventional.



# HMI / UX Update



# Gone are the days of the driver's cluster?

Well not quite but gone of the days of the instrument cluster being the main source of information for the driver.

While Tesla normalized the central screen.

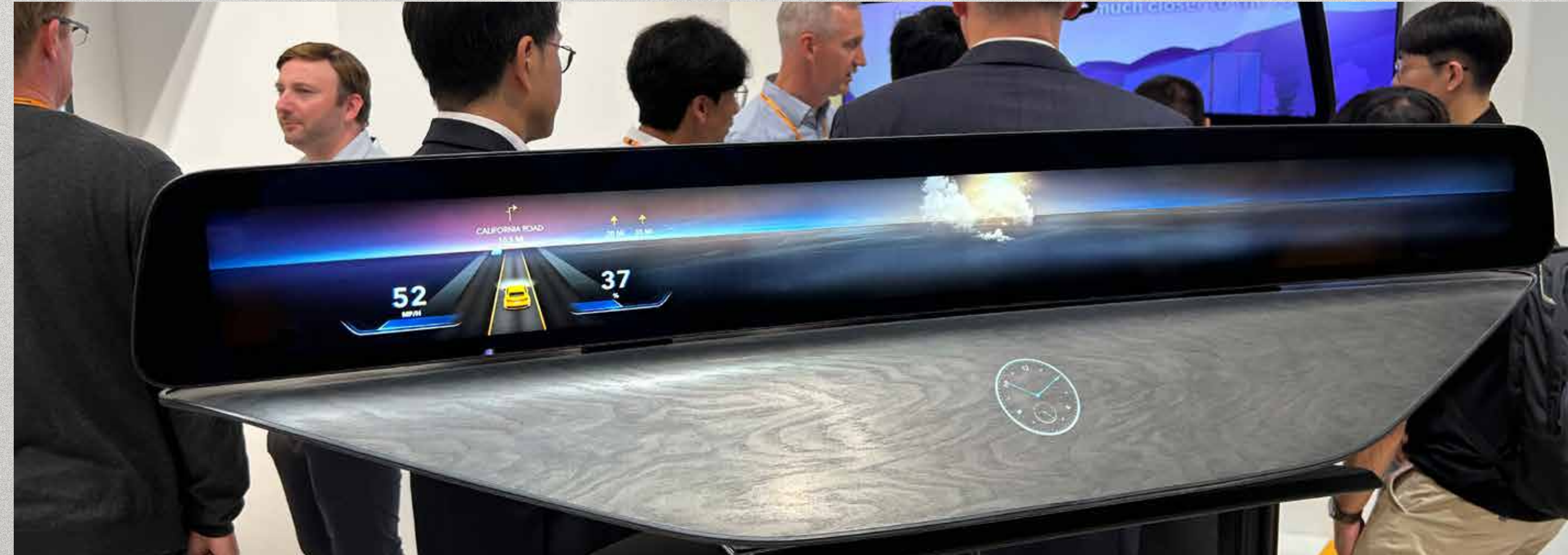
In this digital screen age, overloading the driver with information is always a risk. Reducing the information right in front of the driver to the absolute minimum and moving all non essential information to the central screen is what we see most manufacturers see as the solution, at least until gesture control, advanced head-up displays and AI come in full force.



# Big Bigger Biggest

With the updated Tesla 3, we saw an increased screen. But even the new Tesla screen is small in comparison with the screens featured in the Xpeng G9 and other Chinese manufacturers.

Besides the size, it is interesting to note how the screens are being utilised. We saw an increase in integrated games and entertainment apps on offer. BYD showed a screen that could be rotated and, among other forms of entertainment, let the passengers sing along with a karaoke mode.



# Passenger Screen

In Asia, screens on the passenger side aren't a novelty, but the makeup mode featured in the Xpeng felt like a helpful addition and was well executed. It can adjust the lighting and give AI-driven suggestions.

Following this trend from Asia, European manufacturers are introducing dedicated passenger screens. Lotus (owned by Geely) and Rimac both showed a small screen for the passenger.





# New Shapes, New Brand Expressions

No doubt the show's star when it comes to on-brand experience was the new round screen for MINI developed by Samsung. The look, feel, and functions presented in the many menus were right on MINI brand message.

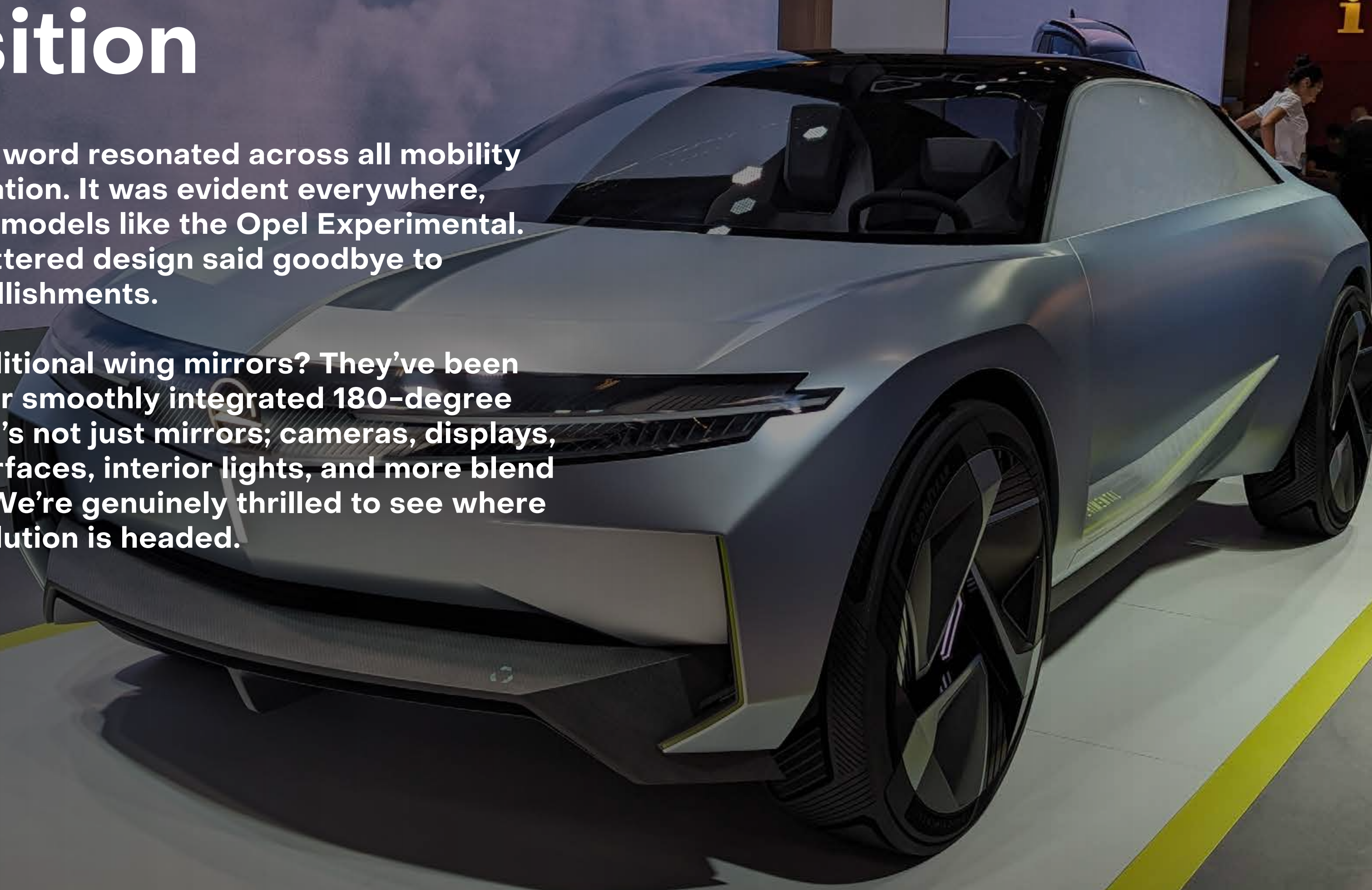
A round screen can feel a little gimmicky, but it was well integrated and fits in the history of the Mini brand; we were big fans! The technical freedom to step away from the rectangular shape can open the door for and unlock new ideas in interior design.

At Samsung's own booth, they presented a flexible screen. We can see many applications for this, as well as roll-up screens. Will OEM's be convinced by the robustness claims and risk putting it in their road cars in the next few years?

# Smooth Tech Transition

At the IAA, one word resonated across all mobility sectors: Integration. It was evident everywhere, especially with models like the Opel Experimental. Its sleek, uncluttered design said goodbye to needless embellishments.

Remember traditional wing mirrors? They've been swapped out for smoothly integrated 180-degree cameras. And it's not just mirrors; cameras, displays, passenger interfaces, interior lights, and more blend in seamlessly. We're genuinely thrilled to see where this design evolution is headed.





# Light Design

22.59



# Light Design

Automotive lighting has undergone a remarkable transformation, blending innovative technologies with diverse designs to elevate a vehicle's appearance, performance, and safety.

We observed cutting-edge lighting trends at this IAA edition, including holographic patterns, parametric designs, and distinctive 3D shapes.

But we also saw a counter trend of simple, sleek designs.

“Stacked headlights” are also still prevalent, but designers are getting better at hiding them.

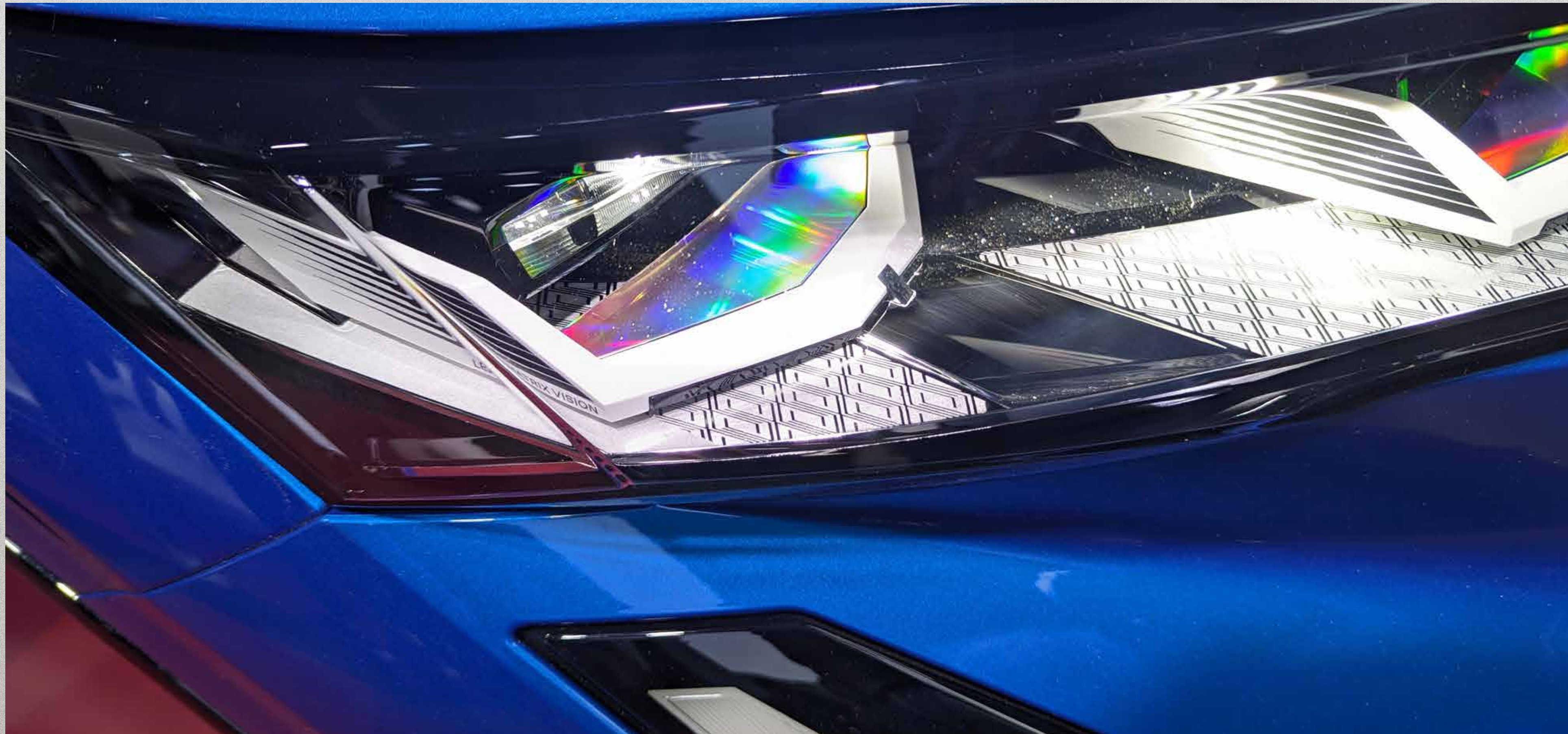


**Minimal/Integrated**



# Parametric/Geometrical





# 3D Tech



# Stacked headlights

(LED strip featured on prominent top, main beam hidden away in the bumper or grill)



Pixel art



# Sustainability

29.59

# The Drive Towards Sustainable Mobility

Year after year, the IAA impresses with its dedication to sustainability and innovative solutions. This edition featured electric vehicles, with multiple brands unveiling their newest models.

Alongside these, captivating advancements in solar charging, aerodynamic constructions, and sustainable CMF designs for interiors were presented.

A notable initiative emerged from a collaborative effort between the German Aerospace Center (DLR) and HWA. They tackled the growing concern of fine particulates (FRM) by launching a prototype car that collects almost all the FPM produced by its tires and brakes. The collected particles are kept in a purpose-built container that can be emptied in a responsible way as needed. This pioneering approach heralds the prototype as a contender for the world's most eco-friendly road vehicle title.



# Autonomous Driving



# Driver Assistance

Driver assistance technology is steadily advancing to become more intuitive, incorporating increasingly advanced self-driving features. The clear trajectory in this field is the development of fully self-driving technology for widespread use.

We see the primary beneficiaries of this technological evolution to be shared mobility and public transport vehicles. While low-speed solutions are already familiar on our roads, there are noteworthy newcomers making their presence known.

The integration of advanced self-driving features holds the promise of transforming transportation, making it more efficient, convenient, and accessible for a broader audience.



# VDL Group x Schaeffler Self-Driving Shuttle



VDL, one of our longest clients has partnered up with Schaeffler and showed a mock-up of a autonomous people mover.

Although meant as a technology demonstrator as presented here we would not be surprised to see this concept on the road in the future.

The compact vehicle with low floor and double door entrance boasted a light, warm interior. The living room themed interior welcomed and put passengers at ease and the CMF was in line with VDL's new electric city bus the Citea.

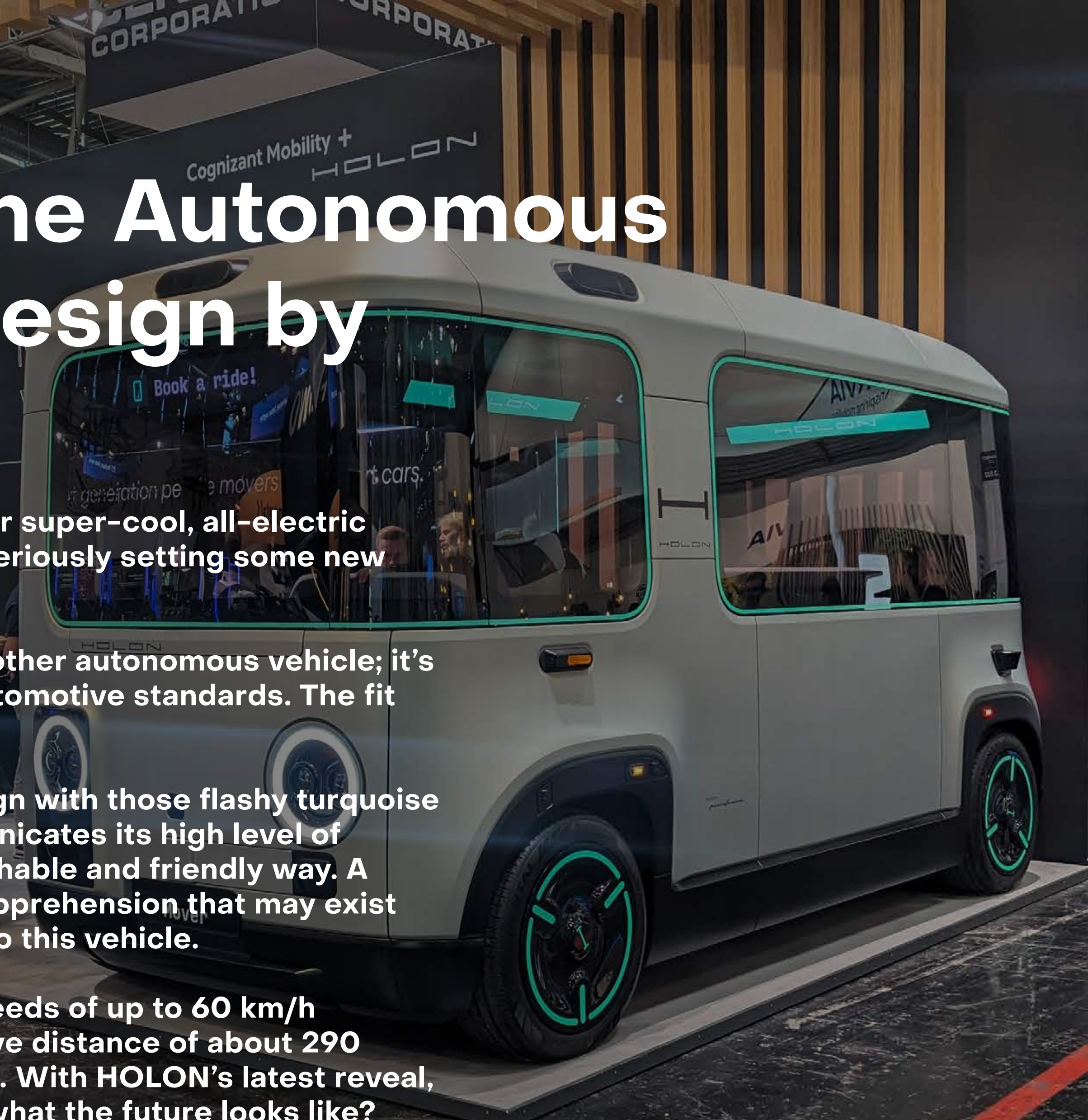
# HOLON The Autonomous MOVER Design by Pininfarina

HOLON has just dropped their super-cool, all-electric autonomous mover, and it's seriously setting some new global standards.

This cute beast is not just another autonomous vehicle; it's built following the highest automotive standards. The fit and finish was impressive.

Its unique asymmetrical design with those flashy turquoise LED lights effectively communicates its high level of technology but in an approachable and friendly way. A proven method to ease any apprehension that may exist with passengers stepping into this vehicle.

It can cruise on its own at speeds of up to 60 km/h and covers a pretty impressive distance of about 290 kilometers on a single charge. With HOLON's latest reveal, it makes you wonder: Is this what the future looks like?



# Micromobility



# Smaller for a better future?



At this year's IAA, the prominence of micro-mobility solutions was more evident than ever.

As urban centers grapple with congestion and pollution, micro-mobility re-emerges as a game-changer.

After the rise and fall of SMART and other micro cars, it was interesting to see so many here, and to see real interest in this segment. Well-equipped, tech-laden smaller vehicles were abundant. The Opel, YOYO and especially the Micocar got a lot of attention.

Are people finally ready to pay a premium for a smaller footprint?

The lineup ranges from on-the-go e-scooters and shared bikes to cutting-edge e-bikes and agile Segways. By taking up minimal space and encouraging active transit, micro-mobility offers a nimble response to today's urban transport challenges. We've been here before and it did not prove






**CMF**

39.59

# Highlights





At this year's IAA, the Color, Material, Finish (CMF) realm truly stood out, offering a wealth of intriguing highlights. A discernible trend towards sustainability was notably present, particularly in the transition from traditional leather to more eco-friendly fabric solutions. Lighting played an innovative role, with exterior illumination being used to modulate and influence color dynamics, exemplified by models such as the Opel Experimental.

The showcased color palettes were not only diverse but also truly captivating. Luxurious metallic hues, reminiscent of the deep space, were on display, showcasing varying warmth levels in their reflective flakes. Sophisticated grays took center stage, and there was a distinct nod to the past through the presentation of nostalgic color combinations.

Notably, some vehicles adopted a bold approach by featuring contrasting interior and exterior palettes, underscoring the evolving dynamics in automotive CMF trends.



# Slate Metallics

**Monochrome  
Luxury  
Gloss  
Sophisticated**

N<sup>o</sup>1

## Timeless Gray Sophistication

In the realm of automotive CMF, the emergence of luxury greys signifies a blend of sophistication and modernity. No longer merely a neutral choice, these greys encapsulate depth, warmth, and elegance. Subtle undertones bring a multi-dimensional feel to these shades. Paired with metallic finishes or matte textures, luxury greys offer a timeless appeal, resonating with consumers seeking both understated elegance and contemporary chic.



# Shimmer Shift

Innovative  
Surprising  
Subtle



N<sup>o</sup>1

## Alternative Perspective on Color

Among the standout innovations in the realm of CMF, the integration of light to dynamically influence both interior and exterior colors holds a special allure for us. By employing a foundational hue as a canvas, the interplay of light can be harnessed to subtly modify and adapt the shade, offering a customizable visual experience. This ability to shift and morph colors using luminosity doesn't just enhance aesthetics; it heralds a new era of adaptive design, merging technology with artistry. Truly, this is a glimpse into the future of automotive CMF.





# Epic Era

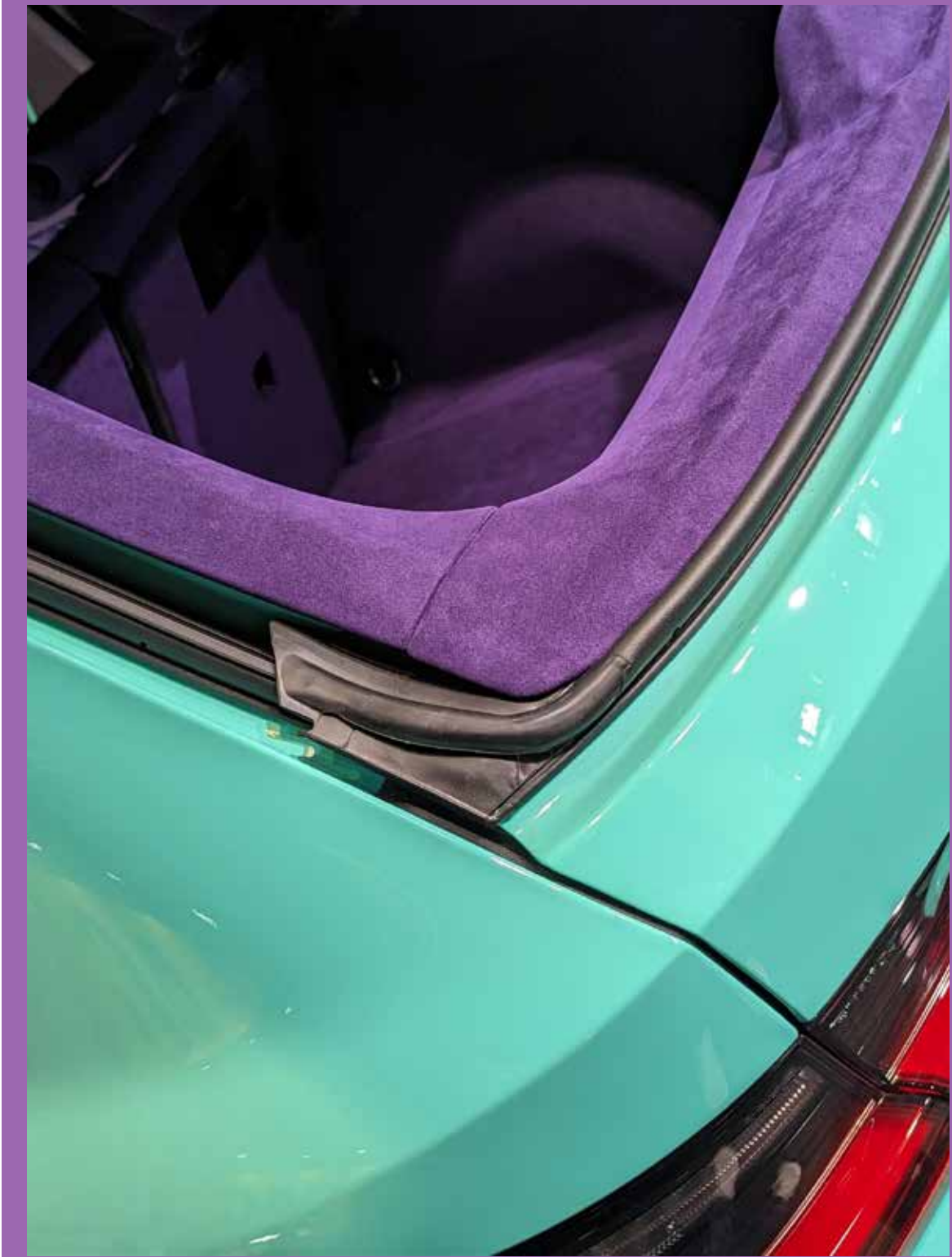
Nostalgic  
Colourful  
BOLD



# N<sup>o</sup>1

## Nostalgic Vibes

In the automotive CMF landscape, there's a riveting resurgence of the nostalgic color palette. These retro hues, reminiscent of bygone eras, are making a bold comeback, striking a chord with both vintage aficionados and the modern minimalist. Why the appeal? They bridge the past's charm with today's edgy designs, offering a comforting familiarity amidst rapid technological shifts. In an age craving authenticity, these nostalgic shades are more than just a palette; they're a statement, a nod to timeless elegance in a fast-paced world. Dive into the past to drive the future.

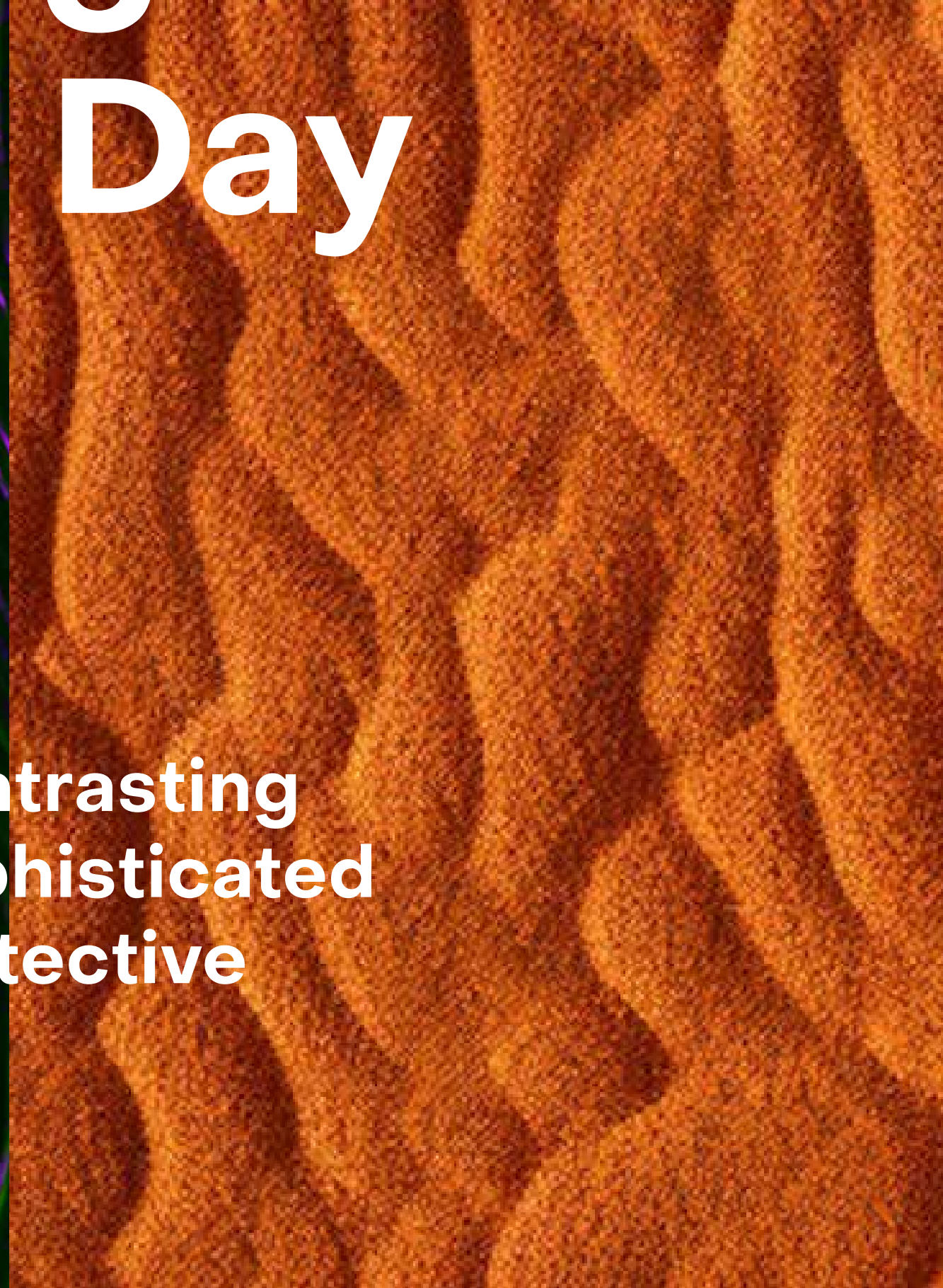






# Night & Day

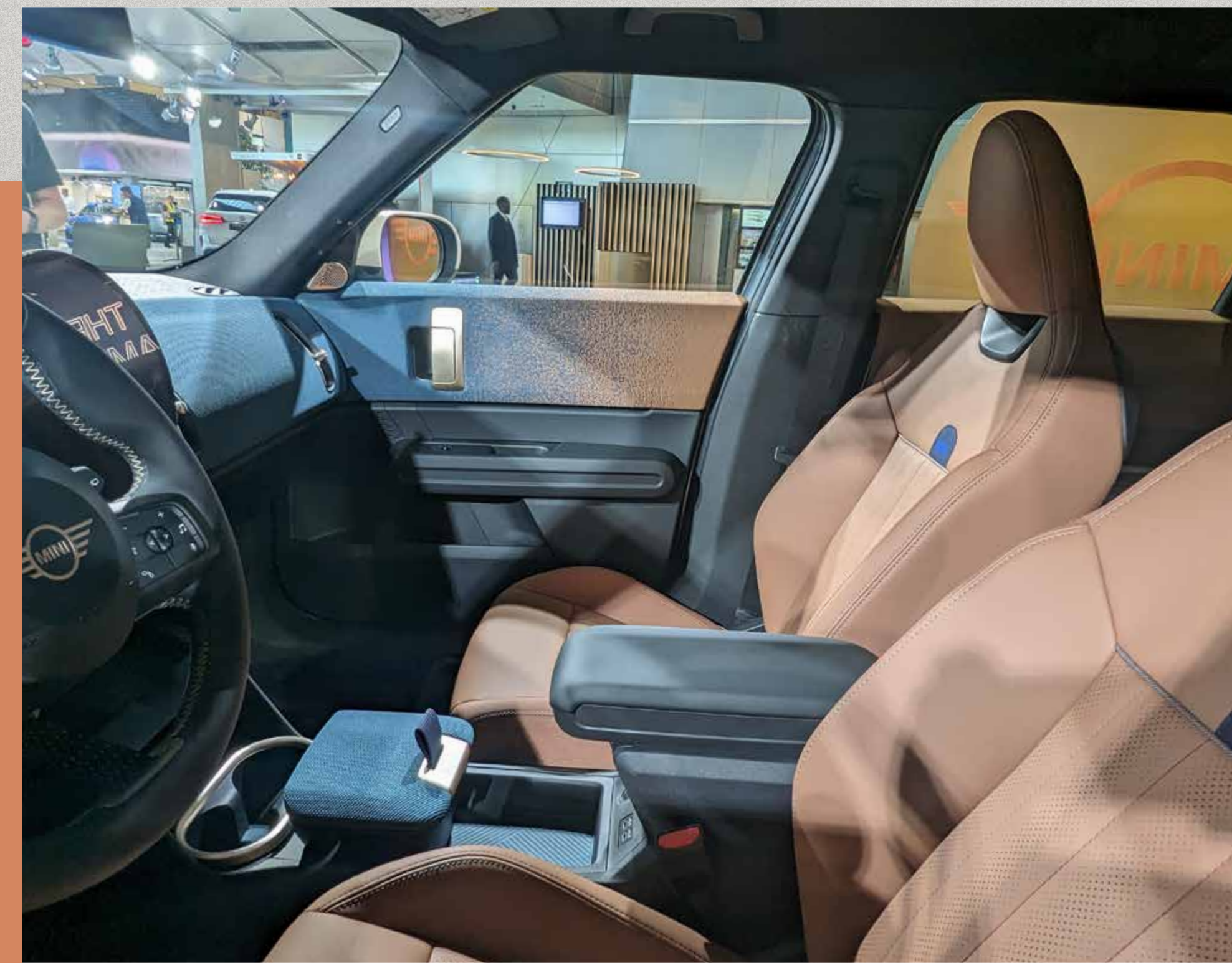
**Contrasting  
Sophisticated  
Protective**

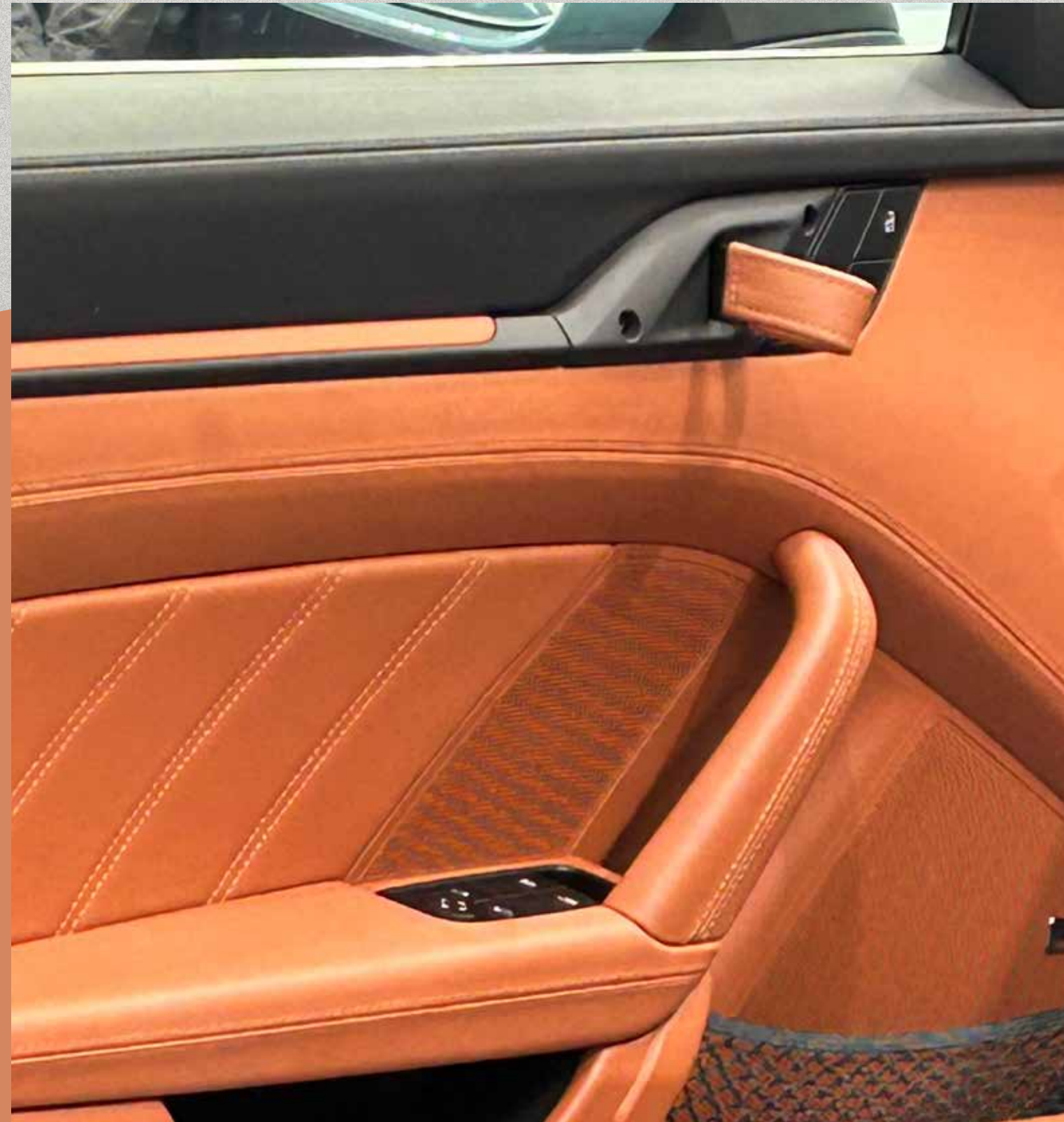


# N<sup>o</sup>1

## Duality

This duality—reserved elegance on the outside and a burst of warmth and personality on the inside—encapsulates a design philosophy of balance. It's about creating a protective shell that reflects the world's complexities while ensuring the inner space remains a testament to hope, energy, and individual flair.





**RAW**



**Earthy  
Subtle  
Warm**

**N<sup>o</sup>1**

# Natural Nuance

In the evolving realm of automotive CMF, nature emerges as a profound influencer. A distinctive drift towards organic materials, notably wood, is increasingly evident in vehicle interiors. These wooden elements, seamlessly integrated, exude a timeless sophistication while grounding the cabin in earthy authenticity.



# Galactic Glow

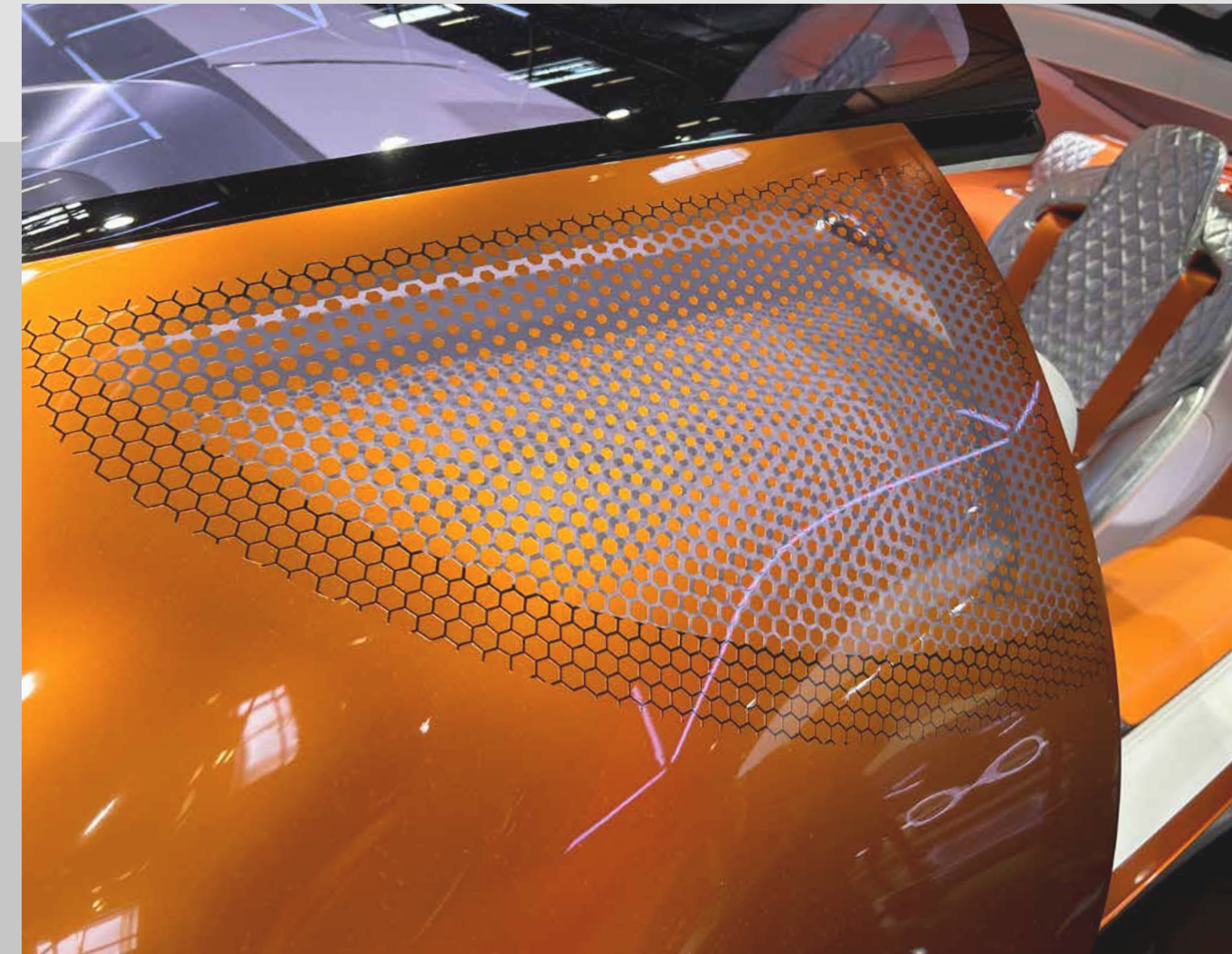
**Bold  
Shimmer  
Metallic**



# N<sup>o</sup>1

## Out of Space

There's a palpable blend of futurism and fantasy, transporting occupants not just from point A to B, but offering a voyage through a cosmic dreamscape. This celestial trend not only embodies forward-thinking aesthetics but also resonates with our age-old fascination with the mysteries of the universe.







# MODYN

## takeaways!

1

### EV are the only future

The few (internal combustion engine) cars that were introduced at this year's IAA were overshadowed by the excitement and buzz surrounding electric vehicles (EV's). Notably, there was minimal discussion about alternative options like hydrogen. While EV's are currently dominant, hydrogen, driven by advancements in commercial vehicles, could emerge as a credible solution, especially for converting older vehicles.

2

### Micromobility

For many years, micro-mobility cars were considered beyond the realm of the automotive industry, not garnering serious attention from OEMs and the public. Smart attempted to shift this perception in the 2000s, albeit prematurely. However, at this year's IAA, a wave of new microcars from both OEMs and start-ups emerged, addressing the demand for straightforward, eco-friendly, and enjoyable mobility solutions that make a statement.

3

### On-Brand UX experience

The advent of digital screens introduced a new language for brand expression and fostering a connection with your car. Initially lagging behind consumer tech, the on-screen experience has now evolved significantly, with an abundance of apps, updates, and personalized interactions taking the spotlight. These interactions go beyond generic software, offering an extension of the brand rather than a one-size-fits-all approach across various brands.

4

### Spot on CMF

IAA 2023 showcased spot-on CMF trends! Vehicles broke the mold with bold contrasts between interiors and exteriors, mirroring the dynamic shifts in automotive design. The Opel Experimental flaunted innovative exterior lighting that can modify and adapt the shade, offering a customizable visual experience. The color palettes impressed with deep-space metallics, stylish grays, and nostalgic combos. Sustainability stole the spotlight, exemplified by the shift from traditional leather to eco-friendly fabrics!

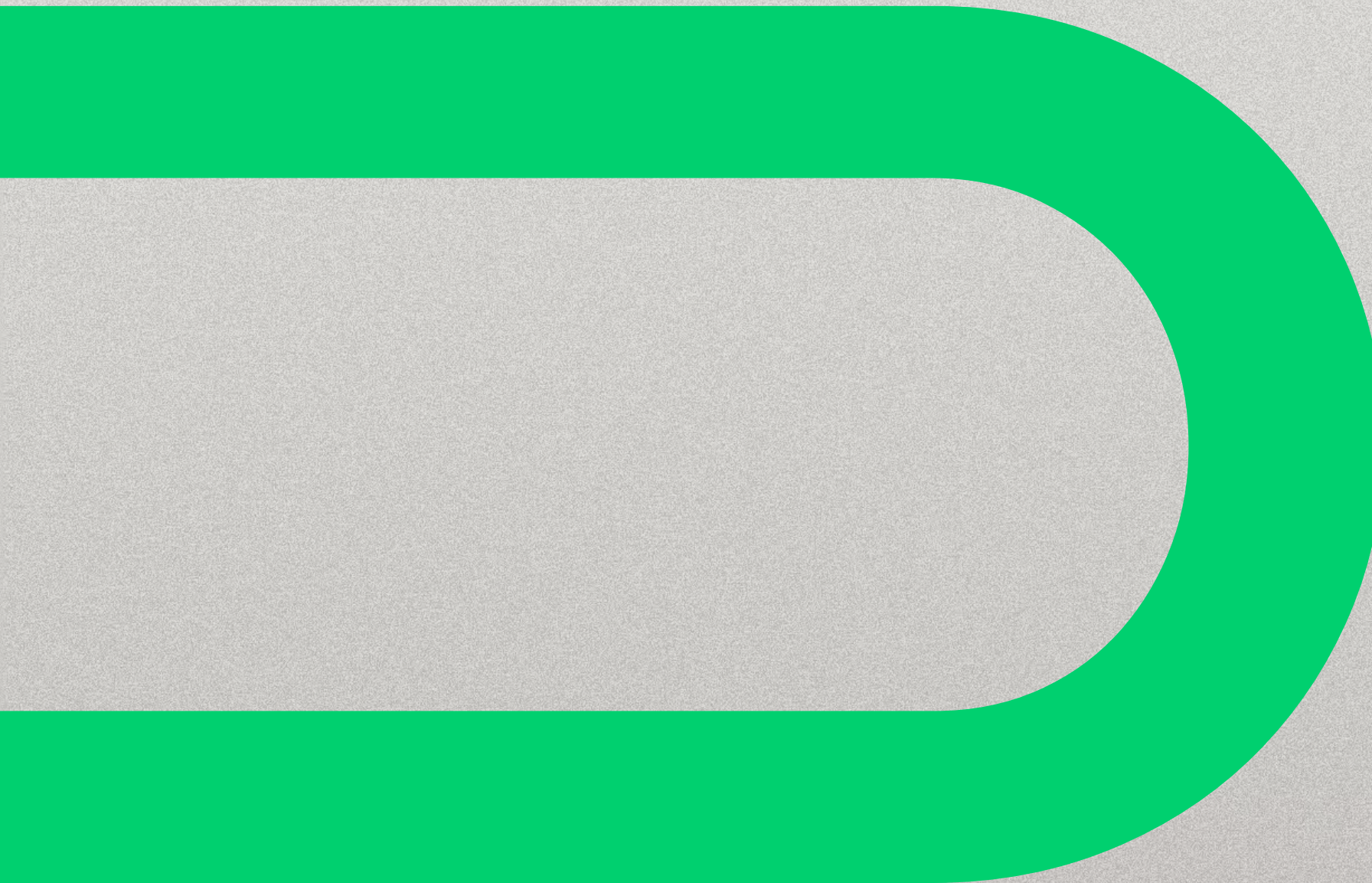
fabrics!



# Thanks for meeting with us!

The IAA, evolving beyond automotive, showcased the entire mobility spectrum with 750 exhibitors and 300+ product debuts. The city-wide setup in Munich's historic center added vibrancy, blending enthusiasts of all ages and backgrounds. Major brands, like Mercedes and Porsche, creatively stood out amidst the cityscape. The outdoor stands effectively communicated brand messages, enhancing the overall experience. We were thrilled to be part of this dynamic event and look forward to the next edition.

**See you in two years!**



Get in touch today to  
discuss **your future**  
with our experts.

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**MODYN**  
design that moves