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Mobility Minds Blog

By PwC Deutschland | 08 January 2026

Mobility AI - From Move 37 to the Future of Fleets?

A $5.86 trillion opportunity: AI-driven fleets, digital coworkers, and new growth domains redefine the future of transport.

https://blogs.pwc.de/en/mobility-minds/article/252669/

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The Move 37 Moment

In March 2016, the history of intelligence shifted. During the match between Lee Sedol and AlphaGo, the AI played "Move 37" — a shoulder hit on the fifth line. It looked like a mistake. It defied centuries of Go theory. But as the game unfolded, the move's genius became clear: it wasn't a blunder; it was a calculation of probability that human intuition had never conceived. It secured the victory.[1]

The automotive industry is now facing its own mobility "move 37" moment. For decades, we have optimized sales, fleets, and supply chains based on human heuristics and historical patterns. We optimized for what we knew. Today, the break-neck speed of generative AI allows us to optimize fleets for what we *cannot* see.

We are entering an era of "unconventional brilliance," where algorithms suggest routing strategies, optimized charging infrastructure, maintenance schedules, and adaptive pricing models for fleets that may seem counter-intuitive but deliver superior outcomes.

A New Map for a New World

To map the board, PwC conducted a study and derived the '**Value in Motion**' framework. Industries are reconfiguring to meet fundamental human needs, creating "domains of growth" that melt sector lines. The domain 'Move' – transporting people and goods – represents a massive addressable market with a **projected value add of $5.86 trillion** by 2035.

The framework explains the industry's reconfiguration through three principles:

- **From Products to Services:** Value is migrating from the vehicle hardware to the software, data, and services it enables, such as mobility, connectivity, and energy management.
- **Rise of Ecosystems:** Competitive advantage no longer belongs to legacy scale but to fluid, interconnected networks where companies collaborate. A "go-alone" strategy is now considered untenable; success depends on strategic partnerships.
- **A Foundation of Trust:** Navigating this new landscape requires a "trust architecture" built on performance, accountability, and digital trust. Mobility AI becomes the key to unlocking new value; particularly in overcoming barriers to electric vehicle adoption: infrastructure gaps, range anxiety, total cost of ownership, and grid limitations.

Agentic AI in Action: Unlocking the Future of Mobility

Value will be generated by the continuous flow of knowledge and AI agents – acting as digital coworkers embedded into human teams and digital landscape. This demands a shift to a new strategic flywheel:

1. **Simulate: Testing the Future**
   Before we risk capital on the road, we must risk electrons in the cloud.
   Traditional simulation followed rigid rules. The new wave uses agent-based modeling, augmentation and digital twins powered by AI models mimicking rational and irrational human behavior.

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This enables testing of "Move 37" strategies in a safe, synthetic reality. By running scenarios, we can identify "edge cases" without driving a single physical mile.

2. **Operate: The AI-Defined Fleet**
   AI is moving us from reactive firefighting to predictive precision. The days of scheduled preventive maintenance are ending. The “duck curve” challenge that electrification of fleets intensifies can be solved by AI acting as "soft infrastructure".[2]
   Optimizing the fleet mix based on various scenarios and planning the availability, recharging, and maintenance of public and private fleets will be defined and managed by AI.
   These Digital coworkers integrate seamlessly into the journey of fleet operators to scale operations along the value chain – 24/7.
3. **Serve: From transactional to relational**
   The goal is no longer just lead generation; it is relationship generation. Context-aware AI agents acting as digital coworkers enable the "Segment of One," delivering hyper-personalized recommendations 24/7 like suggesting a service appointment based on actual wear data rather than a generic calendar reminder or suggesting upgrades or leasing extensions building on what they know.

Your Move

When AlphaGo played Move 37, experts were baffled. When it won, they were transformed.

The future of mobility belongs to those willing to embrace the "shoulder hits"— the counter-intuitive, data-driven strategies that redefine efficiency. The technology is ready. The data is available. The only variable left is leadership.

We are mapping the board. It’s your move.

[1] Move 37: Artificial Intelligence, Randomness, and Creativity - John Menick, accessed November 28, 2025, **https://www.johnmenick.com/writing/move-37-alpha-go-deep-mind.html**

[2] Artificial Intelligence-Driven Optimal Charging Strategy for Electric Vehicles and Impacts on Electric Power Grid - ResearchGate, accessed November 28, 2025, **https://www.researchgate.net/publication/390532942_Artificial_Intelligence-Driven_Optimal_Charging_Strategy_for_Electric_Vehicles_and_Impacts_on_Electric_Power_Grid**

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