When mobility is a service, will you choose the destination or the journey?

The better the question. The better the answer. The better the world works.
Where we left off last year…

**TODAY**

88% of travelers do not engage in transport modal choice

**TOMORROW**

71% of SMILE pilot respondents tried new routes

74% of trips by Helsinki Whim respondents involved public transport (previously 48%)

Consumers are willing to change transport choices when Mobility-as-a-Service (MaaS) solutions are offered
How can you accelerate customer adoption of MaaS and who are the key ecosystem players?
wavespace brings you:

- Proven environment and methodology that create insight and inspiration
- Innovative and collaborative support for key projects and problem statements
- Digital assets that help distinguish client solutions

wavespace enables:

- Experience-led design
- Rapid prototyping
- Enterprise and innovation strategy
- Disruptive technology showcase
- Advanced analytics and AI
Welcome to waveSpace™
Accelerating customer uptake through market variety.....

On-demand Shared Multi-modal Network

W³ - Whatever, Whenever, Wherever

1. THE WORLD OF MOBILITY AT YOUR FEET

2. YOU CAN TRUST US

3. YOU ARE UNIQUE

Lunch Box Shuttles

Flexible, suburban “Lunch Box Shuttle” gives autonomy for all.

Huge GDP increase foreseen. Taxes to be lowered soon. Family happiness index at highest level ever.
…..this requires thinking beyond the current often narrow view of the Urban Commuter

Current focus is on traditional consumers in urban environments – however, real need is potentially beyond these well served commuters.

**Family and child**
“Pick me up, I need to get there now! You are late”

**Suburban blue collar**
“Don’t take my car away!”

**Urban time poor**
“I love to Live, but I never have time for it!”
....delivering a digital service focussed on a personal experience with a travel co-pilot......

To create meaningful mobility solutions, you need to know your users and care about their lives!
…. but who will own and operate the assets - all concepts were platform plays or marketplaces….

**Mobility Ecosystem**

- **Passenger**
  - Mass Transit
  - Private Transport
    - MMJP
  - Personal Transport
    - MMJP

**Cloud Solutions**

- Routing
  - Ticketing
  - Dispatching
  - Payment

**City Data Ingestion**

- Supply/Capacity
- Demand

**Service**

- Mobility, regional, cross-regional, national infrastructure

**OEMs**

All business models:
- Focused on being the integrator, owning the customer through data-driven understanding
- Had AI and predictive as a core feature
- Reliant on utilization of shared assets and access to mobility data
.... where freemium models are likely but **free** is the key...

New business models require new design around platform economics for the customer
... the focus is not on autonomous cars... all transport modes are needed to provide the widest appeal

**Micro-mobility.** There was a great emphasis on the new forms of transport and the benefits they bring:

► Health
► Pollution
► Congestion
► Convenience and cost

**Sharing Gen2.0** is key to mass adoption allowing affordability and new sharing models to be brought to the fore, for both car and purpose built vehicles. Customer benefits range from productivity to affordable luxury.

**Re-Defining Ownership**
Developing new ownership models focused on:

► Sharing from the outset
► Value exchange
► Personal Aspiration
► Electrification
...however the future mobility market is not only about people by 2025 with goods it represents a $8.3 trillion market* and impacts every organization…

*Source: EY Analysis, Oxford Economics
....and is likely to re-configure the value chain

Toward 2030 and beyond…

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<th>Freight Trading platform</th>
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<td>Vehicle Services Market Place</td>
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<td>Vehicle Fleet Management Company</td>
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<td>Vehicle Fleet Investment Managers</td>
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<td>Transport as a Service Platform Provider</td>
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*Illustrative Examples*
...equally the value map for logistics and freight will be re-shaped...

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<tr>
<th>Infrastructure</th>
<th>New traditional</th>
<th>Newly Enabled</th>
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<tr>
<td>Charging</td>
<td>Battery recycling</td>
<td>Fleet share</td>
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<td>Truck Parks</td>
<td>Trailer share</td>
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<td>Transport infrastructure</td>
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<td>automation</td>
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<td>Aggregator</td>
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<td>Freight service provider</td>
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<td>Fleet manager</td>
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<td>Technology enablers</td>
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<td>OEM</td>
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Over $3.2B transactions in TaaS over the last 6+ months!

...majority of the investments from outside the sector - Tech companies, PV/VC lead

...and almost all of the targets were start-ups with innovative business models
…so from the wavespace session what questions should we as potential players ask?

► Will mobility markets evolve into marketplaces or platforms? Or both?
► What is the asset operator and service provider play?
► Is this characterized by one or many markets?

► Is there a business model that delivers value to all by being free to travelers?
► If there are many markets, does a viable business model require playing in more than one?
► How to best enter the market now and profitably?
Thank you!

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