



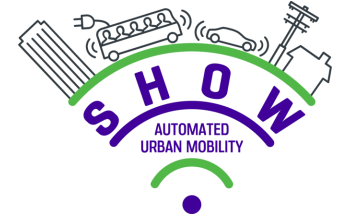
Business and operating models

Ralf Willenbrock, Product Manager Connected Mobility, 18-09-2020



1st Pan European Workshop– Virtual meeting – September 2020

Pre-COVID Market situation for SHOW UCs



SHOW will study the following business/operating models

1. PTO and non-PTO based shared mobility services (i.e. „combi ticket“ between PTO and connected MaaS provider)
2. Carsharing (B2C, B2B and PPP)
3. Vehicle-based logistics (including LaaS)
4. TMC-based services, i.e. TMC's acting as MaaS platform, selling dedicated lanes for Avs
5. Aggregator based Services and Applications, i.e. city wide CCAV mobility platforms

Pre-COVID Deployment and Go-to-Market strategies for these business/operating models

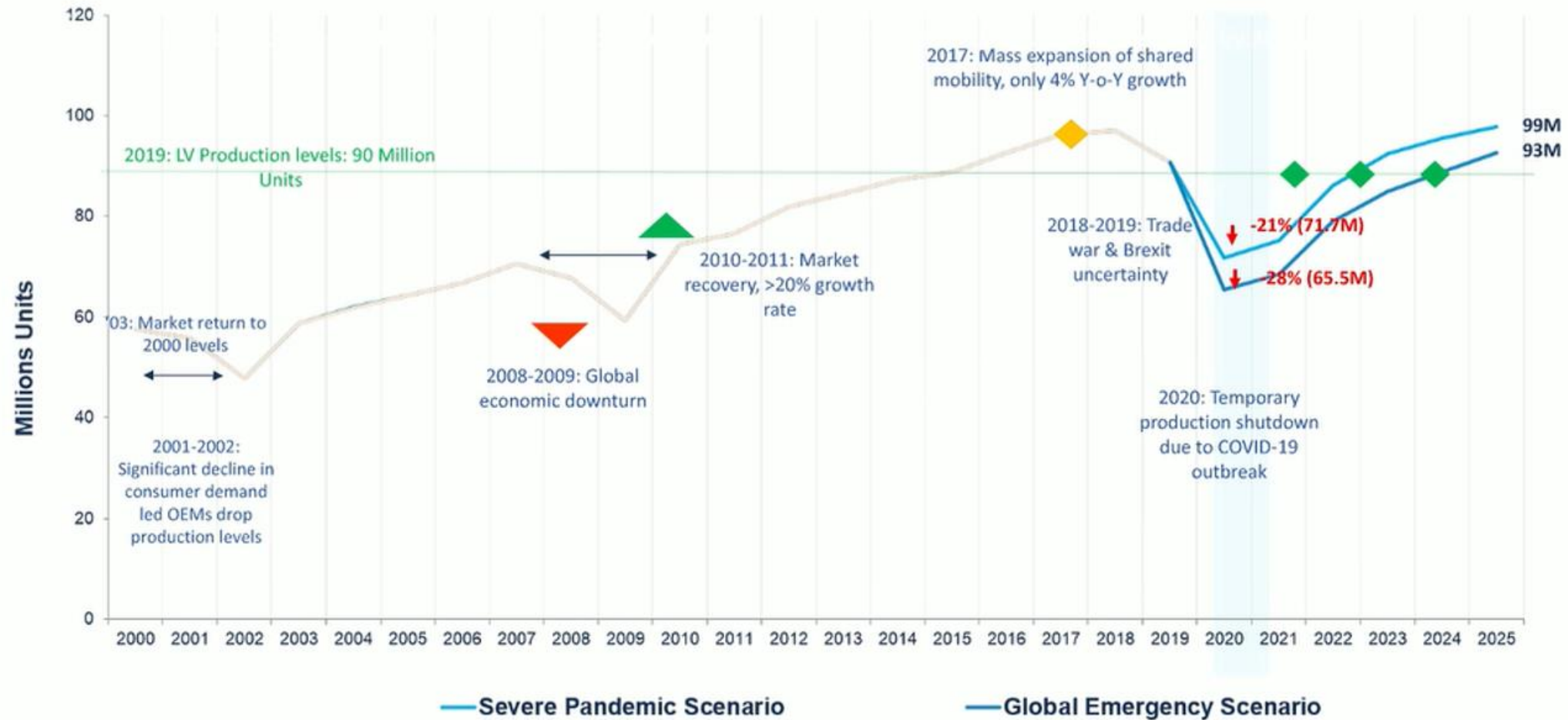


- **Central Model:** CCAV will be operated by the city aligned with urban transport plans and integrated into local TMC
- **Liberal Model:** A city is contracting automated fleet services per district and service type (PT, DRT, MaaS and LaaS)
- **AaaS Model:** An aggregator is selected to provide mobility services across all types of city transport models (consortium, PPP, investment groups, e.g. EIB, KfW, etc.)
- **Social Innovation Model:** City offers „automated mobility islands“ operating complementary services to PT (e.g. Logistics) or ridehailing

Post-COVID Market situation

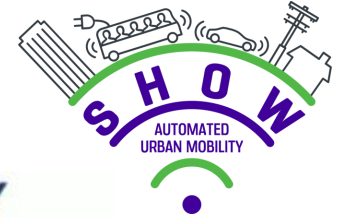


ANNUAL LIGHT VEHICLE PRODUCTION GLOBAL TO DECLINE BY ABOUT 21%



Note: Light Vehicles include Passenger Vehicles and Light Commercial Vehicles with GVWR of up to 6 MT

Post-COVID Market situation

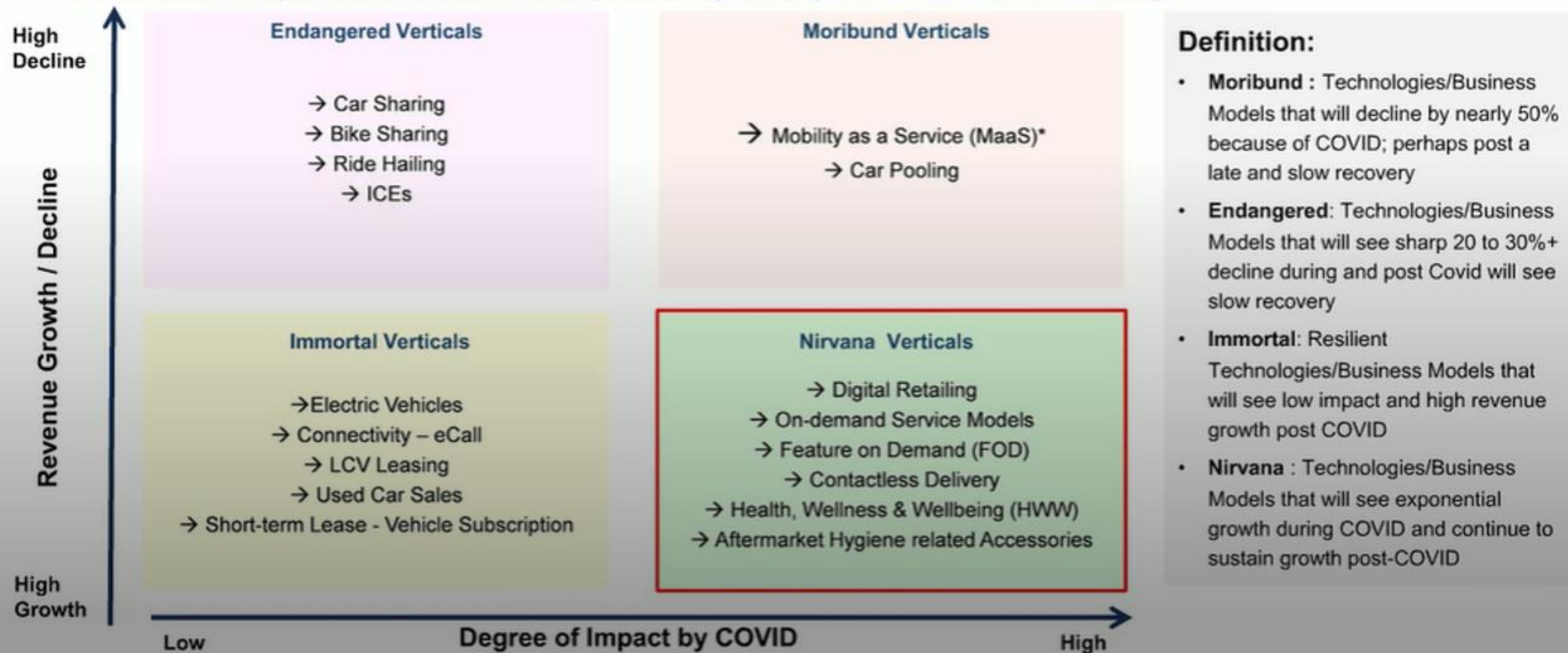


IMPACT OF COVID-19 OUTBREAK – MORTALITY MATRIX OF THE AUTOMOTIVE INDUSTRY



Future prospects cover the spectrum from collapse and sharp declines to high and, in some cases, exponential growth

COVID-19 Growth Impact Assessment for the Automotive Industry: Mortality Matrix Of the Automotive Industry



Post-COVID Market situation



GROWTH OPPORTUNITIES IN SHARED MOBILITY — SINGLE OCCUPANCY SHARED MOBILITY TO BOUNCE BACK STRONGER THAN OTHER SHARED MOBILITY MARKETS

'Bike Sharing' to Increase in the Short-term



Fleets to be 'Repurposed for Doorstep Delivery of Essential Goods'



'Single Occupancy Mobility Modes' to Make Rapid Recovery



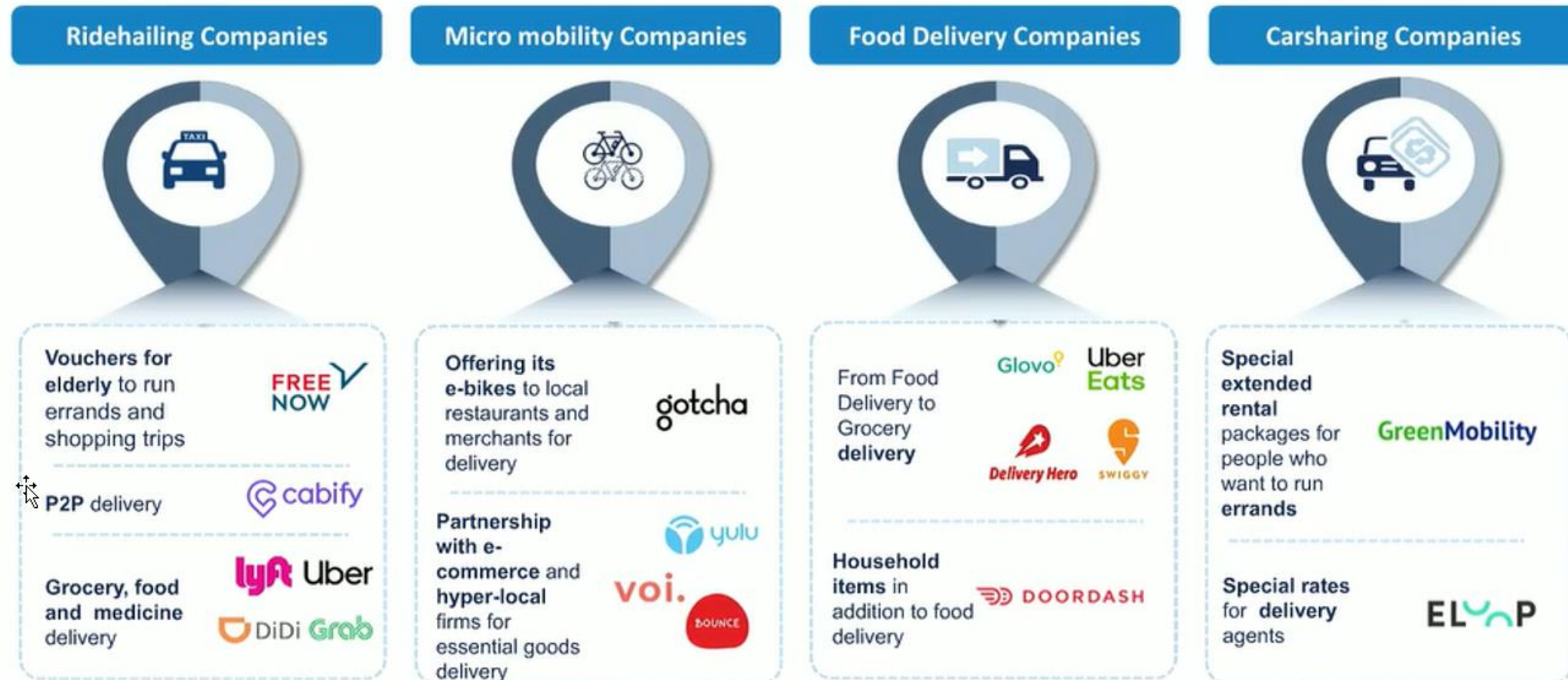
Evolution from Single Shared Mobility Apps to Mega Apps - Continue to 'Diversify Service Offerings'



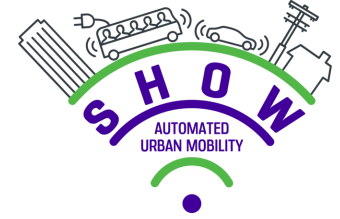
Post-COVID Market situation



COVID-19 PUSHES MARKET REALIGNMENT- DOORSTEP DELIVERY BIG OPPORTUNITY FOR SHARED MOBILITY OPERATORS AND COULD BECOME A NORM IN A POST COVID-19 WORLD



Post-COVID Market situation



SHOW has to reflect changes of Pre-COVID market assumptions

1. PTO and non-PTO **MaaS** providers under **COVID-pressure** due to single occupancy demand rather than shuttle-bus services
2. Carsharing under **COVID Go-to-Market pressure**
3. Vehicle-based logistics (including **LaaS**): **Strong opportunities**
4. **TMC-based services**, i.e. TMC's acting as MaaS platform, selling dedicated lanes for Avs: **Public Investment Risks**
5. **Aggregator based Services** and Applications, i.e. city wide CCAV mobility platforms: **Innovation Policy Risks**



PREPARATION FOR THE INTERACTIVE WORKSHOP

Objective of the workshop (45')

Interactive discussion on SHOW business models

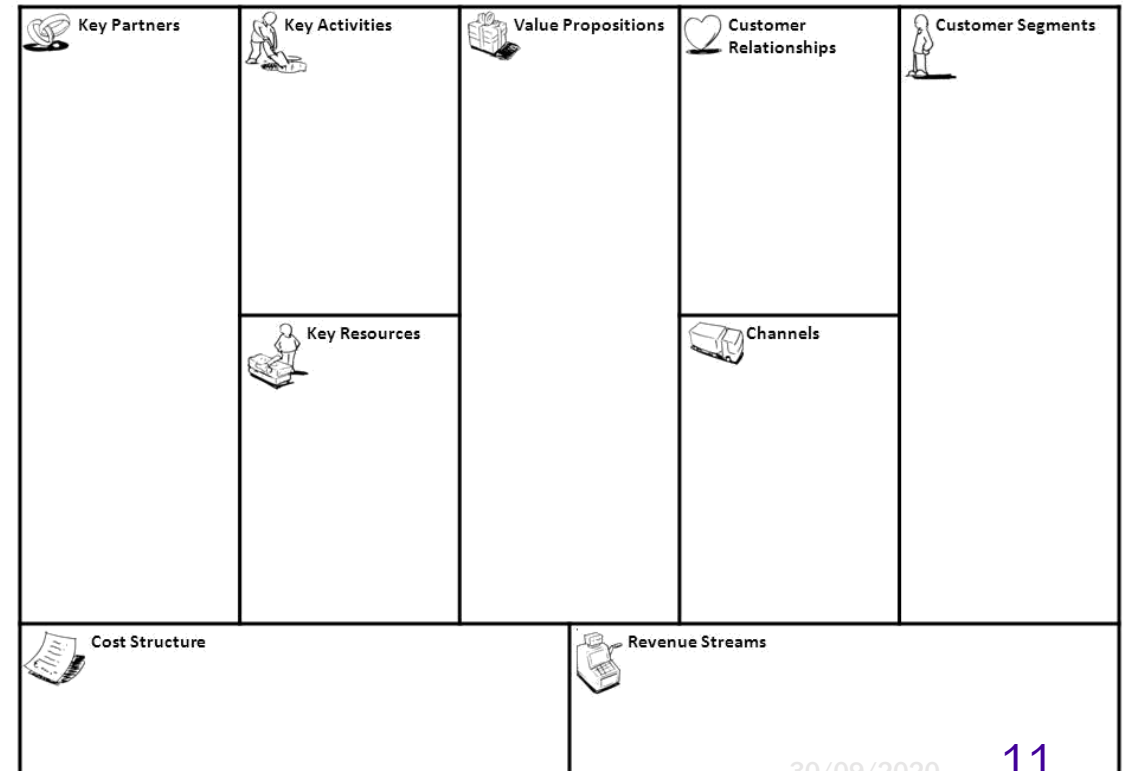


- Presentation of business models identified by the SHOW consortium in D2.1 Benchmarking
- Get your input to the proposed business models
- Develop innovative ideas based on your knowledge
- Find out primary aspects needed for bankable business analysis.
- Prepare the business models for D2.2 (due M12)
Business and operating models

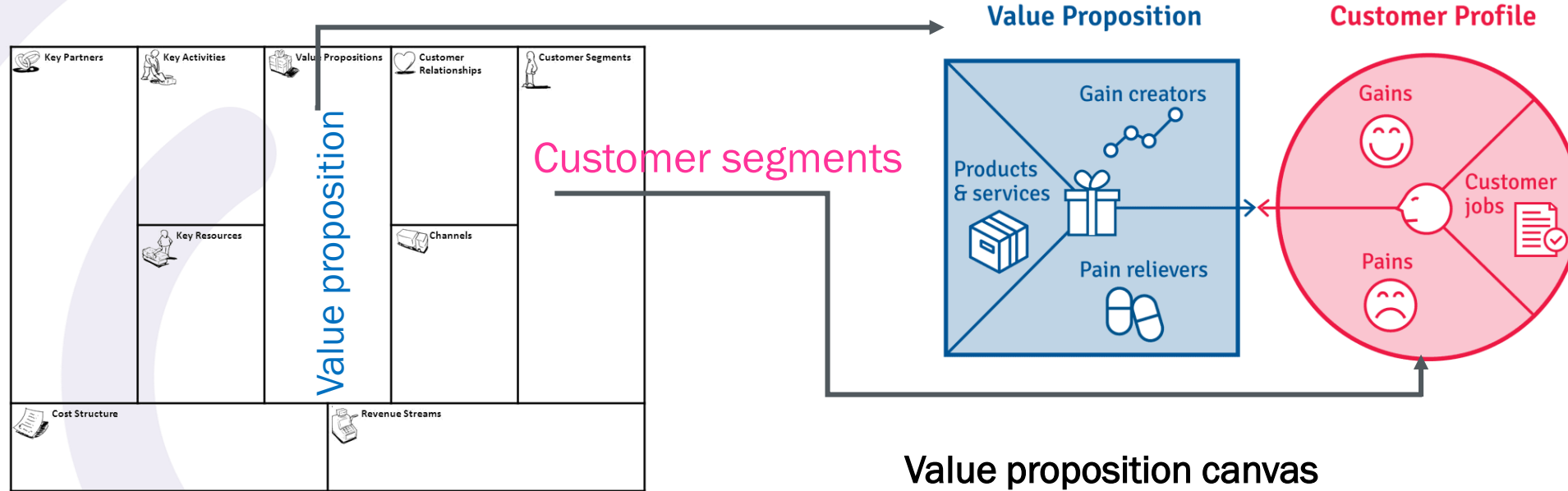
Why do we use business models?



- Business models are an instrument to break down the core parts of every business
 - Understanding a business/ Improving an already existing business
 - Aligning all activities of a project to one goal
 - Evaluating a business (idea)
 - Exploring the scalability of a project



Our approach to business modeling



Business model canvas

- Nine aspects that explain a whole business
- Transforming a project into a business

Value proposition canvas

- Two essential aspects to build the business
- Pointing out the customer needs
- Aligning project activities



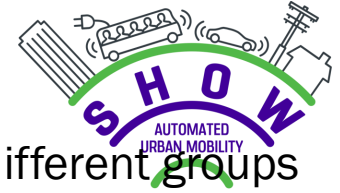
Agreement &
new ideas

Inconsistencies &
remarks

The business model canvas

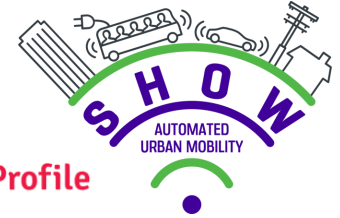


- 1. Key Partners:** Describe the network of suppliers and partners
- 2. Key Activities:** Describe the most important things a company has to do to perform
- 3. Key Resources:** Describe the most important assets required
- 4. Customer Relationships:** Describe the types of relationships a company establishes with specific Customer Segments.



- 5. Customer Segments:** Define the different groups of people or organizations an enterprise aims to reach and serve.
- 6. Channels:** Describe how a company communicates with and reaches its Customer Segments to deliver a Value Proposition
- 7. Value Propositions:** Describe the value that products and services create for a specific Customer Segment.
- 8. Cost Structure:** Describe all costs incurred to operate a business model.
- 9. Revenue Streams:** Represent the cash a company generates from each Customer Segment (costs must be subtracted from revenues to create earnings).

The value proposition canvas



1. Customer Jobs:

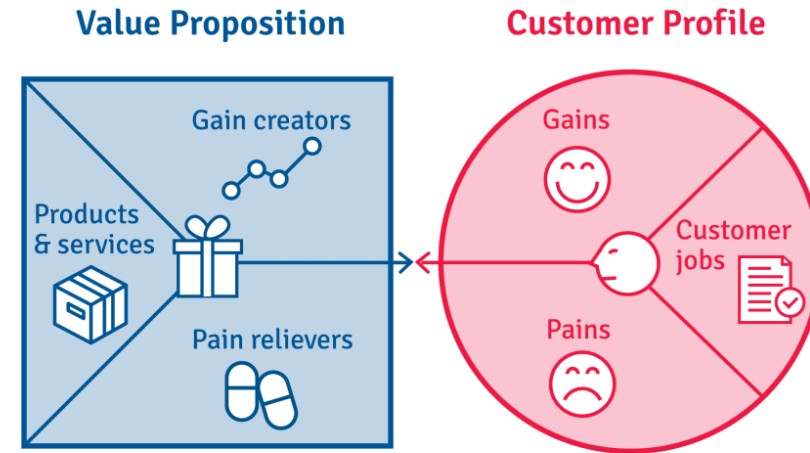
- tasks they are trying to perform and complete
- the problems they are trying to solve
- needs they are trying to satisfy.

2. Pains:

- undesired costs (investment, time, substantial efforts)
- situations (current under-performing, usage mistakes)
- risks (loss of status, resistance to change)

3. Gains:

- benefits that the customer expects
- analyzing the delight for the current situation



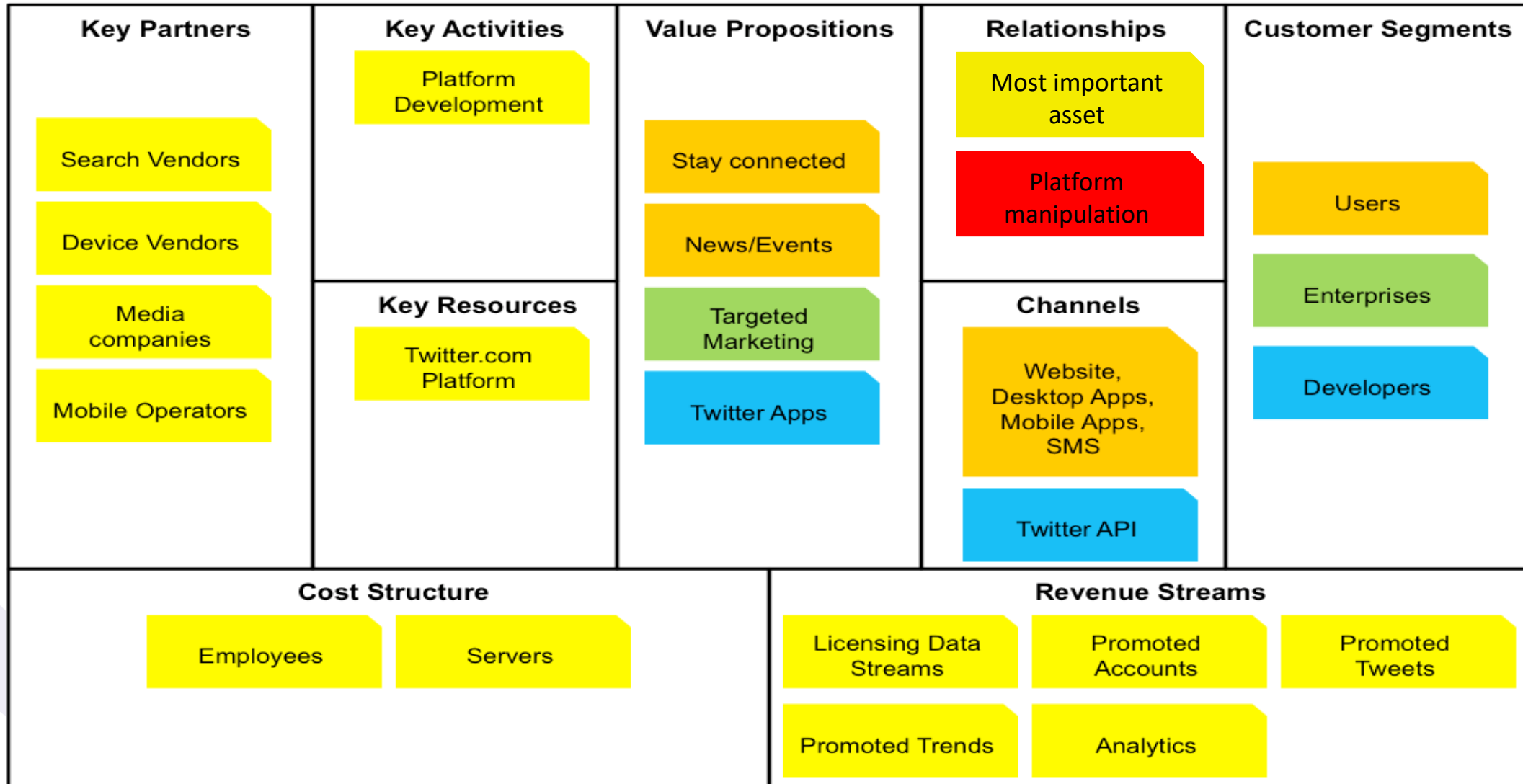
4. Products & Services: List all the products and services your value proposition is built around. Which products help the customer to get a job done


5. Pain Relievers: Describe how your products and services alleviate customer pains

6. Gain Creators: Describe how your products and services create customer gains.

Example: The modern age radio

Twitter





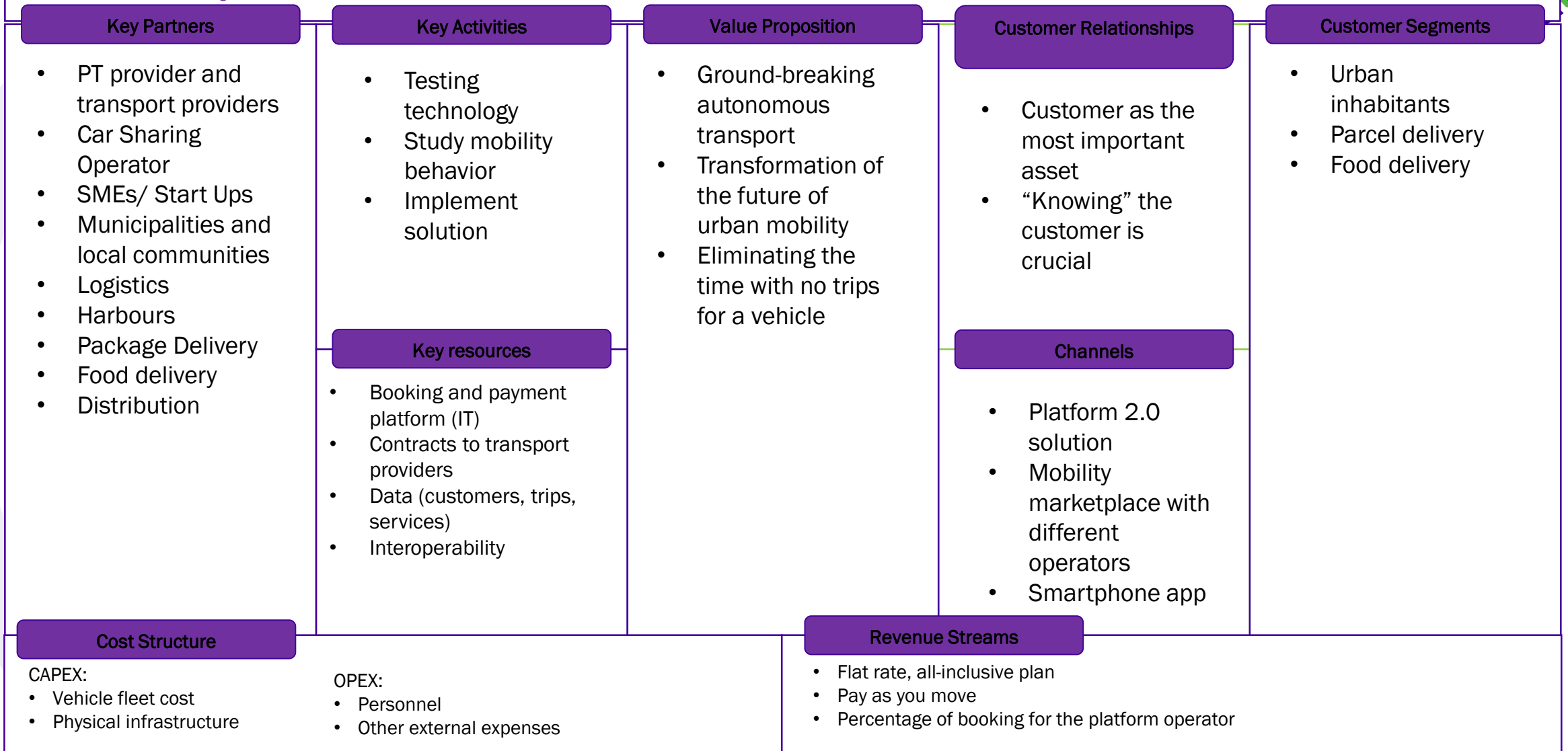
DISCUSSION ON BUSINESS MODELS <45min>

Upscaling a mixed mobility model: Combining MaaS, LaaS and traditional public transportation



- All-inclusive mobility solution to be tested after 2021
- Example fleet (SAE lvl4):
 - 35 micro busses for semi-fixed route transportation (VOLKSWAGEN)
 - 10 high-tech buses for larger groups (SCANIA)
- Value proposition: to install a “ground-breaking autonomous transport project and transform the future of urban mobility”
 - Volkswagen
 - Moia
 - Scania
 - AID – Autonomous Intelligent Driving

Mixed mobility models

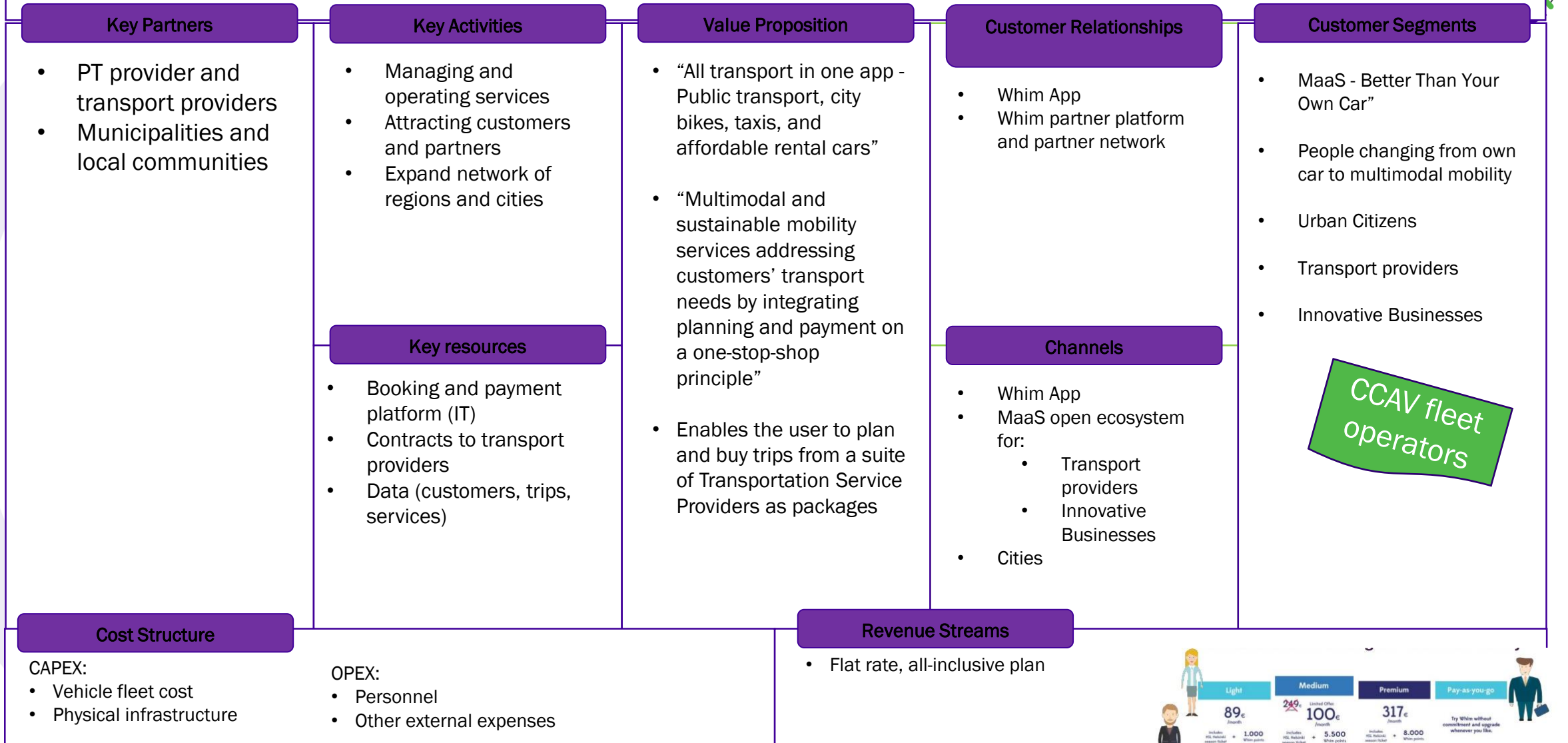


The Netflix of Transportation: WHIM



- All-inclusive MaaS solution available in different cities in Europe
- Operated by MaaS Global Ltd since 2016
- Value Proposition: Offer different flexible mobility services for registered users in an urban and interurban environment during all seasons, times and vacation days:
 - Public Transport
 - City bike
 - Taxi
 - Car Rental (Operator: e.g. Toyota, Hertz, SIXT)
 - E-Scooter (Operator: e.g. TIER)
- The whim app is available or planned for the following cities:
 - Helsinki, Finland
 - West Midlands, Great Britain
 - Antwerp, Belgium
 - Vienna, Austria
 - Greater Tokyo, Japan (planned)
 - Singapore, Singapore (planned)
 - Turku, Finland

WHIM

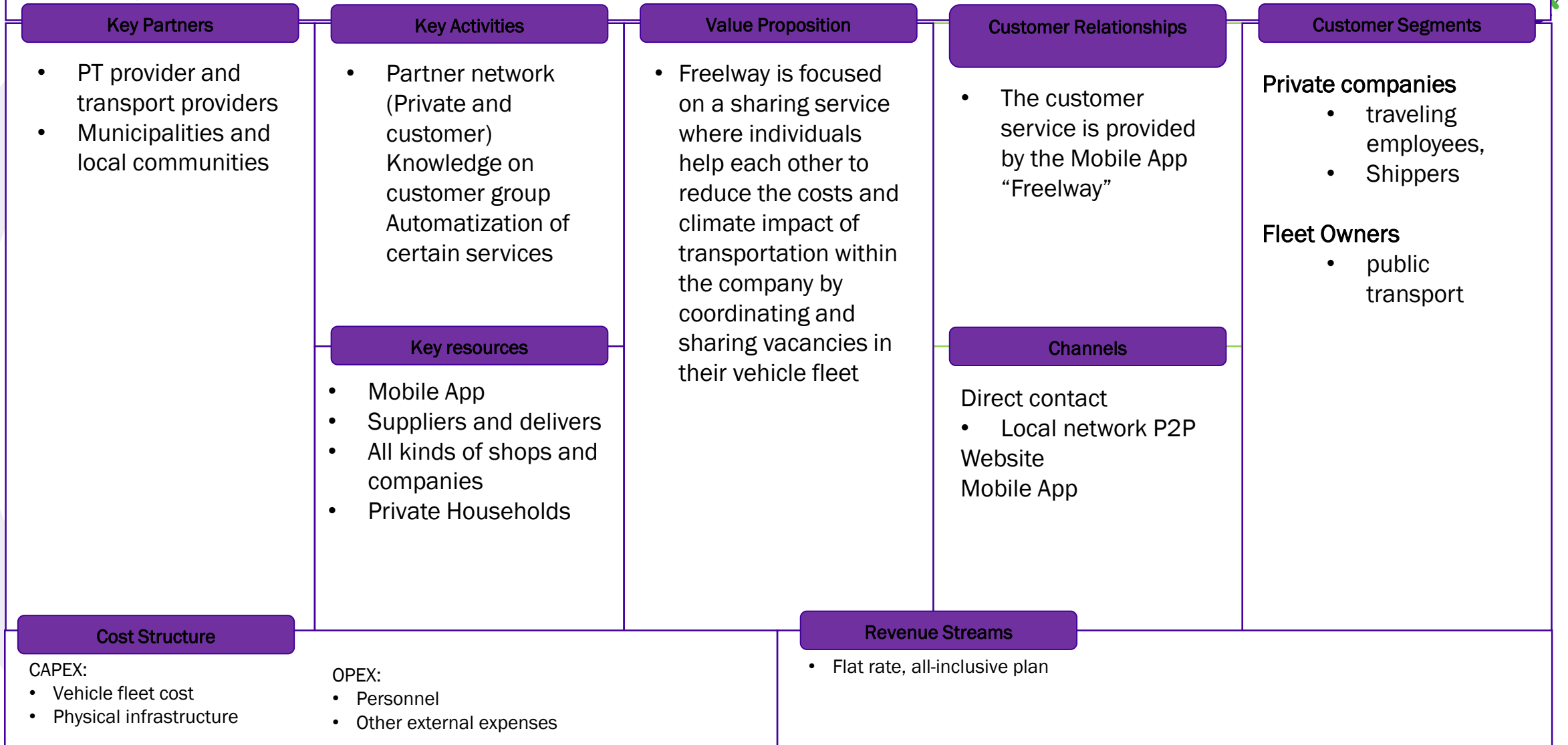


Combining Logistics & Mobility: Freelway



- Service app to coordinate and organize transport deliveries in urban areas in Sweden since 2018.
 - Delivery of groceries, medicine or post (mail)
 - Delivery from restaurants of cafes
 - Deliveries from private person to friends
 - Customer to customer services
- Freight coordination services to coordinate common resources and transport needs
- Reduce costs and climate impact of transportation by coordinating and sharing vacancies
- Automatization for transport in rural areas

Freelway





@SHOW_H2020



<http://linkedin.com/company/showh2020/>

<https://show-project.eu>



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