



GECKO Workshop E1, E2 and E3 Sessions: Business model of new mobility services and technologies, future scenarios and regulatory responses

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Workshop objectives

- Exploring how companies will change their business models in the future scenarios of Greener Community
- Understanding what the regulatory changes (support) are needed to make business model transformation successful
- Understanding how companies change their business models in response to COVID-19

Existing Business Model Results (Aggregate results)

| | Value Proposition/Creation | Value Delivery | Value Capture |
|--|--|--|---|
| Connected, Cooperative, and Automated Mobility | <ul style="list-style-type: none"> The offering of more environmentally friendly, economical, and efficient autonomous vehicles and drones The combination of advanced services and technologies (solutions) which satisfy the unaddressed needs | <ul style="list-style-type: none"> Online Channel (mainly website) International conferences and exhibitions | <ul style="list-style-type: none"> Selling products or services Subscriptions of solutions |
| Infrastructure, Network, and Traffic Management | <ul style="list-style-type: none"> Higher efficiency and speed with lower maintenance cost Lower emission with new technologies | <ul style="list-style-type: none"> Online Channel Traditional B2B relationships | <ul style="list-style-type: none"> Depending on the nature of services or products in this category |
| MaaS and MaaS Platforms | <ul style="list-style-type: none"> The seamless and integrated planning, payment, and ticketing interface The enhanced end-to-end customer experience Custom-made mobility package | <ul style="list-style-type: none"> Online Channel (mainly App) | <ul style="list-style-type: none"> Contract with B2G customers Monthly Subscription fees Pay-as-you-go |
| Shared On-Demand Mobility | <ul style="list-style-type: none"> A travel experience that combines the advantages of private vehicles (i.e., immediate availability, end-to-end travel, comfort, and privacy) with those of the collective transport (i.e., no car ownership, pay-per-use, and easiness in parking) | | <ul style="list-style-type: none"> Monthly Subscription fees Pay-as-you-go |

Future Scenario 2040: Greener Communities

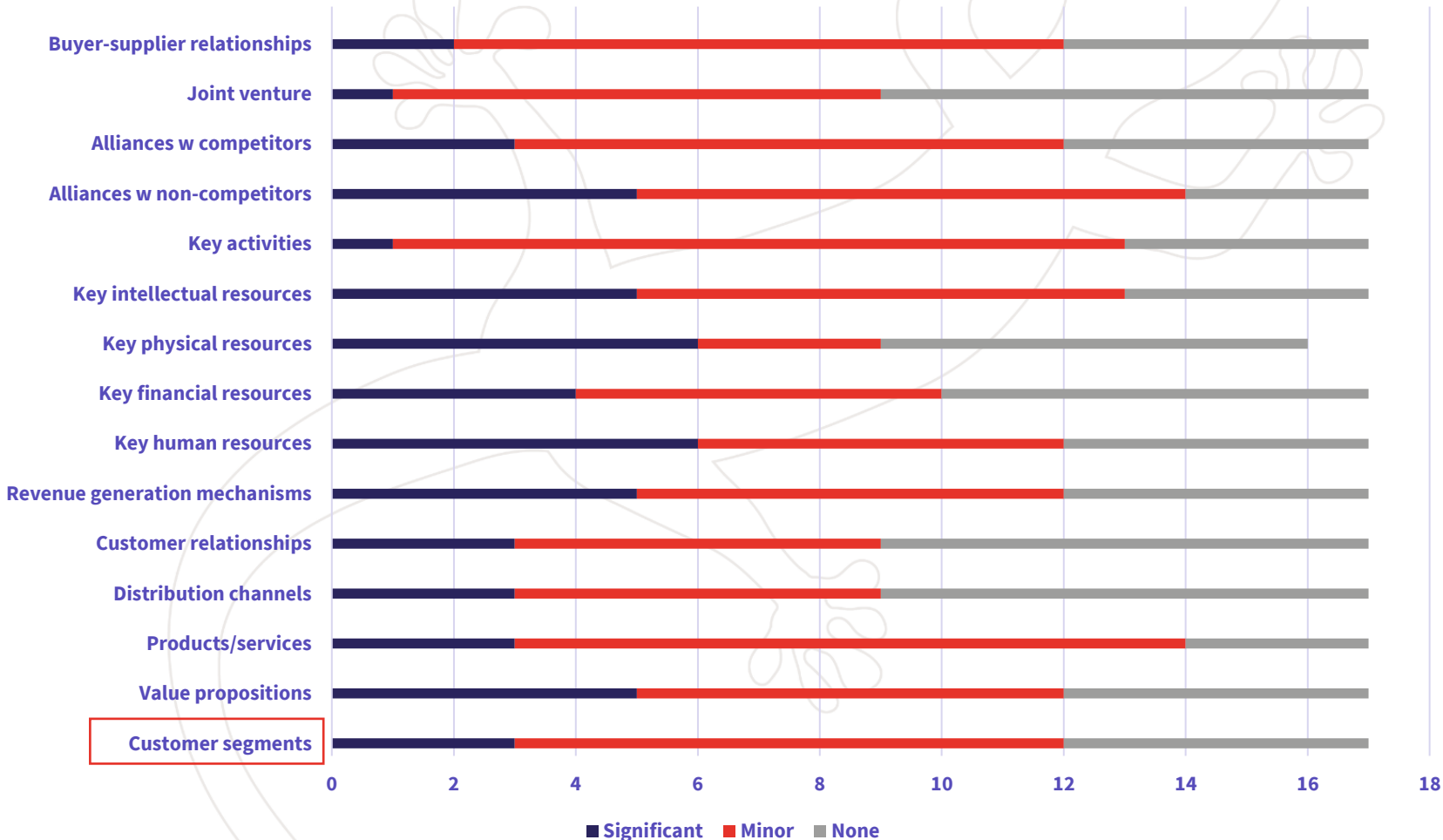
- This projected future scenario is based on reports from government office for science, The Economists and other credible sources. We will assume this scenario will happen and focus on the discussion of business models.
- In 2040, society **becomes less materialistic and prioritises the social and environmental aspects of mobility** over new technology and individual choice. All forms of transport will be faster, more efficient, and seamlessly integrated, both physically and digitally. Below are some key features of the future scenario.

Future Scenario 2040: Greener Communities (cont.)

- **Mobility-as-a-Service (MaaS)** has been successfully rolled out and adopted across demographic groups.
- **Active travel** has significantly grown, improving air quality and providing health benefits.
- **Transport sharing is widespread**, as private **car ownership falls** and use of private AVs only for some groups.
- **Road charging has increased transport sharing**, leading to reduced congestion on the roads
- Data sharing and new technologies are constrained to uses **with clear social and environmental benefit**
- **Transport largely decarbonised**, with **electrification** of rail and widespread uptake of EVs
- **High energy prices and demanding environmental regulations** slow growth in European productivity

Survey Results

With reference to the Greener Communities scenario, to what degree would you need to change the following aspects of your business model to be successful in this scenario?

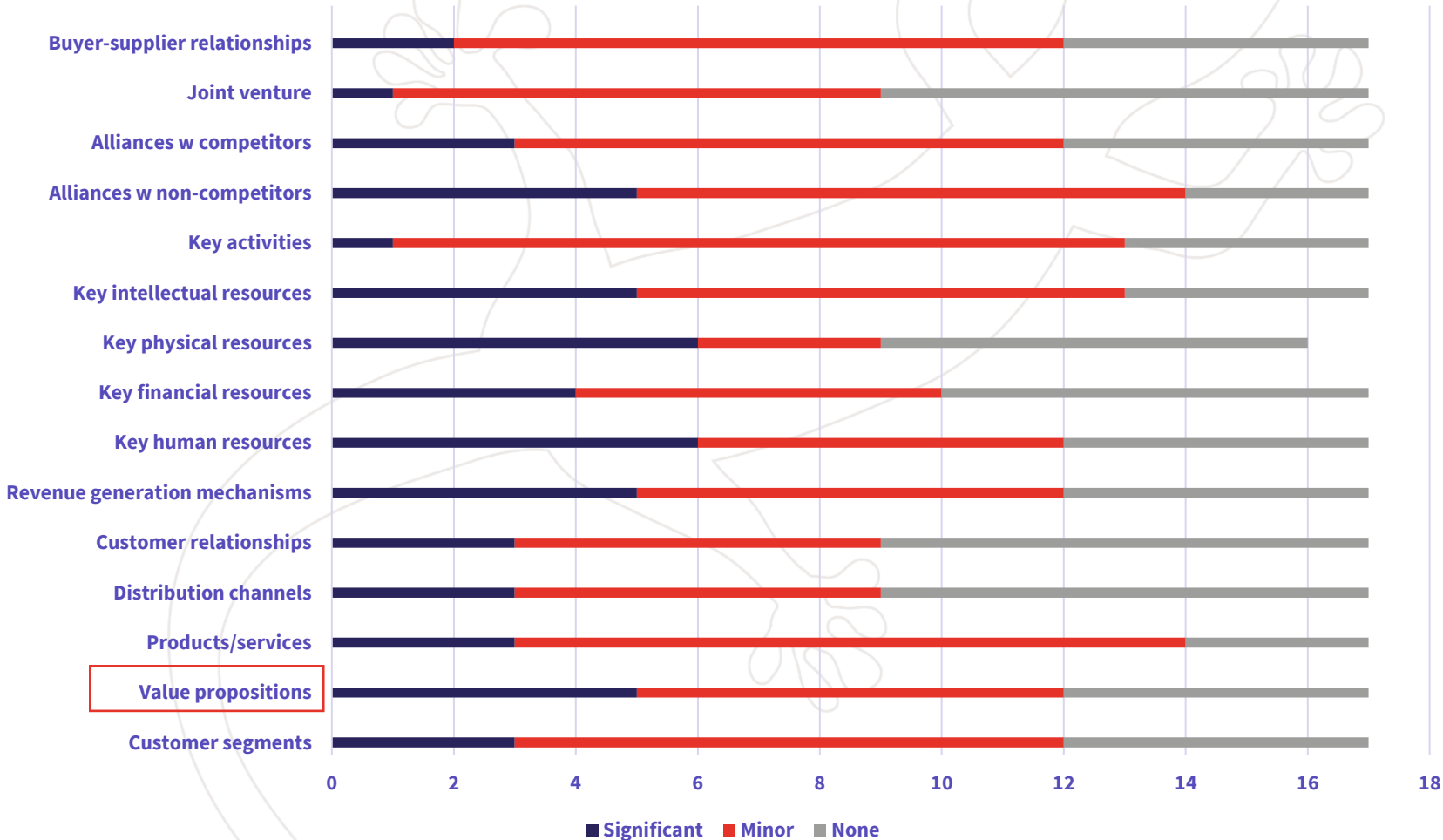


Changes in Customer Segments:

- From B2B to B2G
- Evolutionary process of change
- Helping users of new technologies to interface with mainstream expectations

Survey Results

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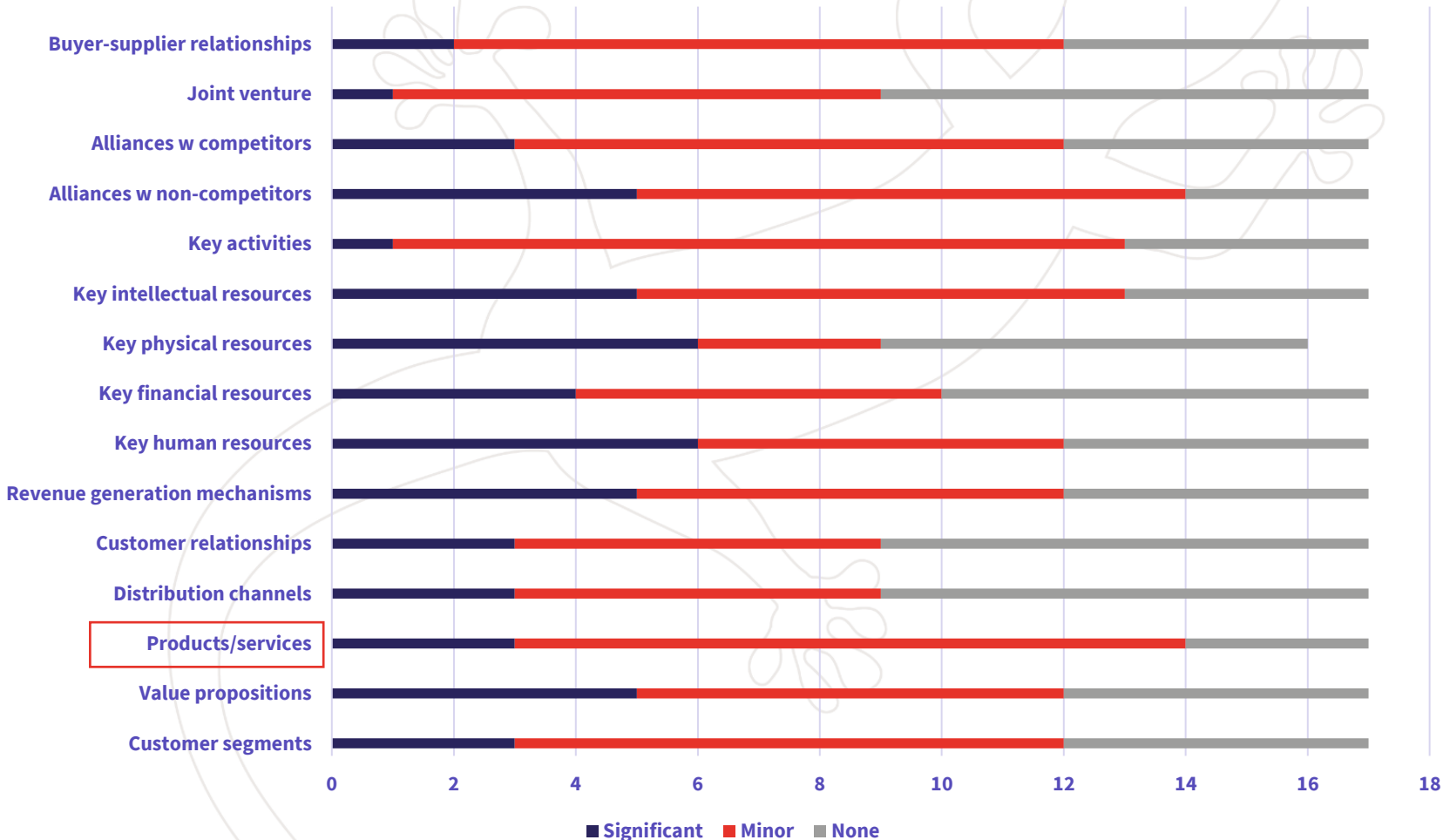


Changes in Value Propositions:

- Dynamic adaptation
- Convince of a car-ownership non prioritization
- Main proposition of safety and harmony between "old" and "new" technologies

Survey Results

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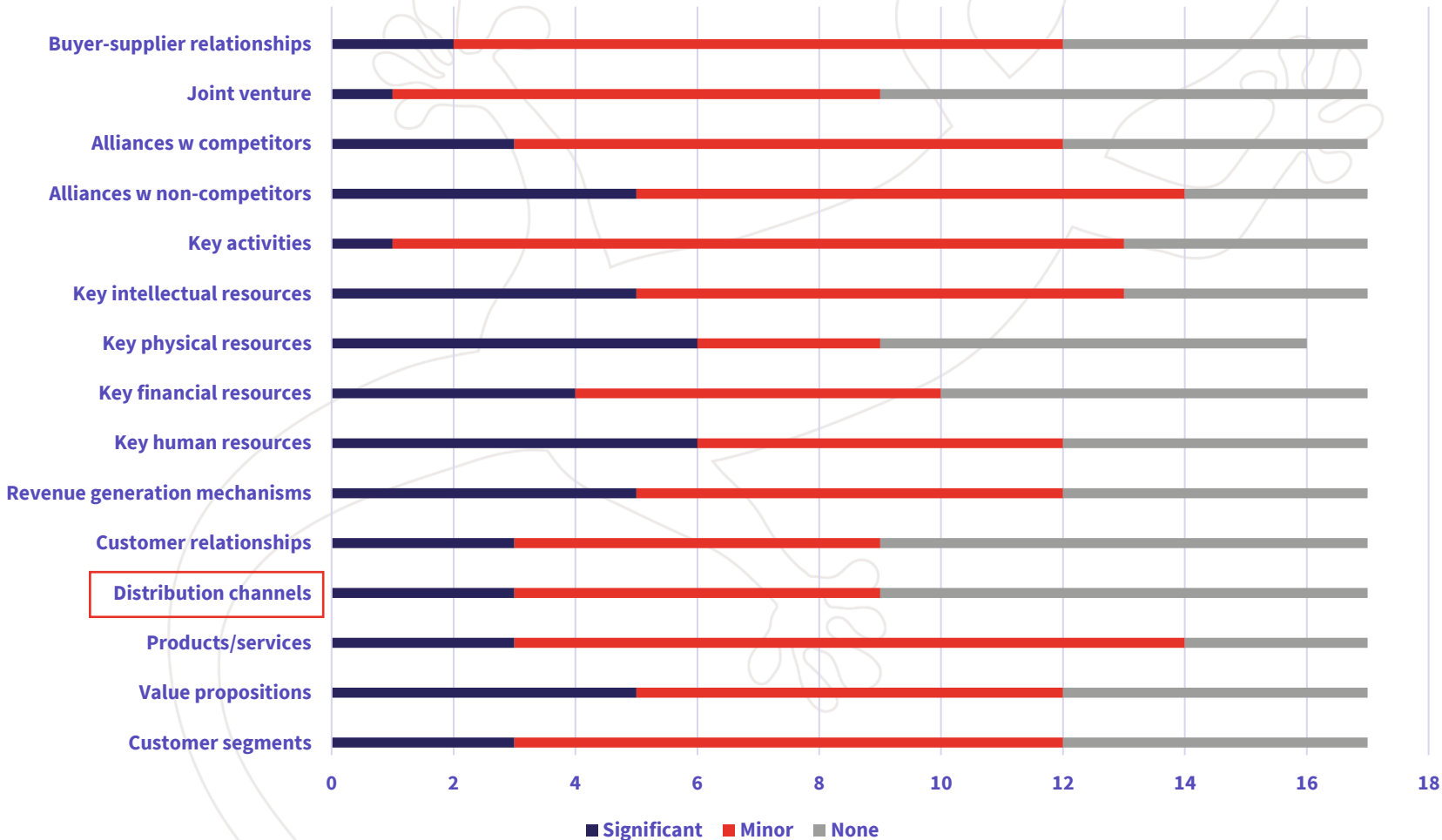


Changes in Products/Services:

- The resources and technologies will need to be changed to offer reliable and convenient services
- Stay basically the same, incorporating implications of emerging technologies
- Autonomous minivans to elevate the suburban public transport experience

Survey Results

With reference to the Greener Communities scenario, to what degree would you need to change the following aspects of your business model to be successful in this scenario?

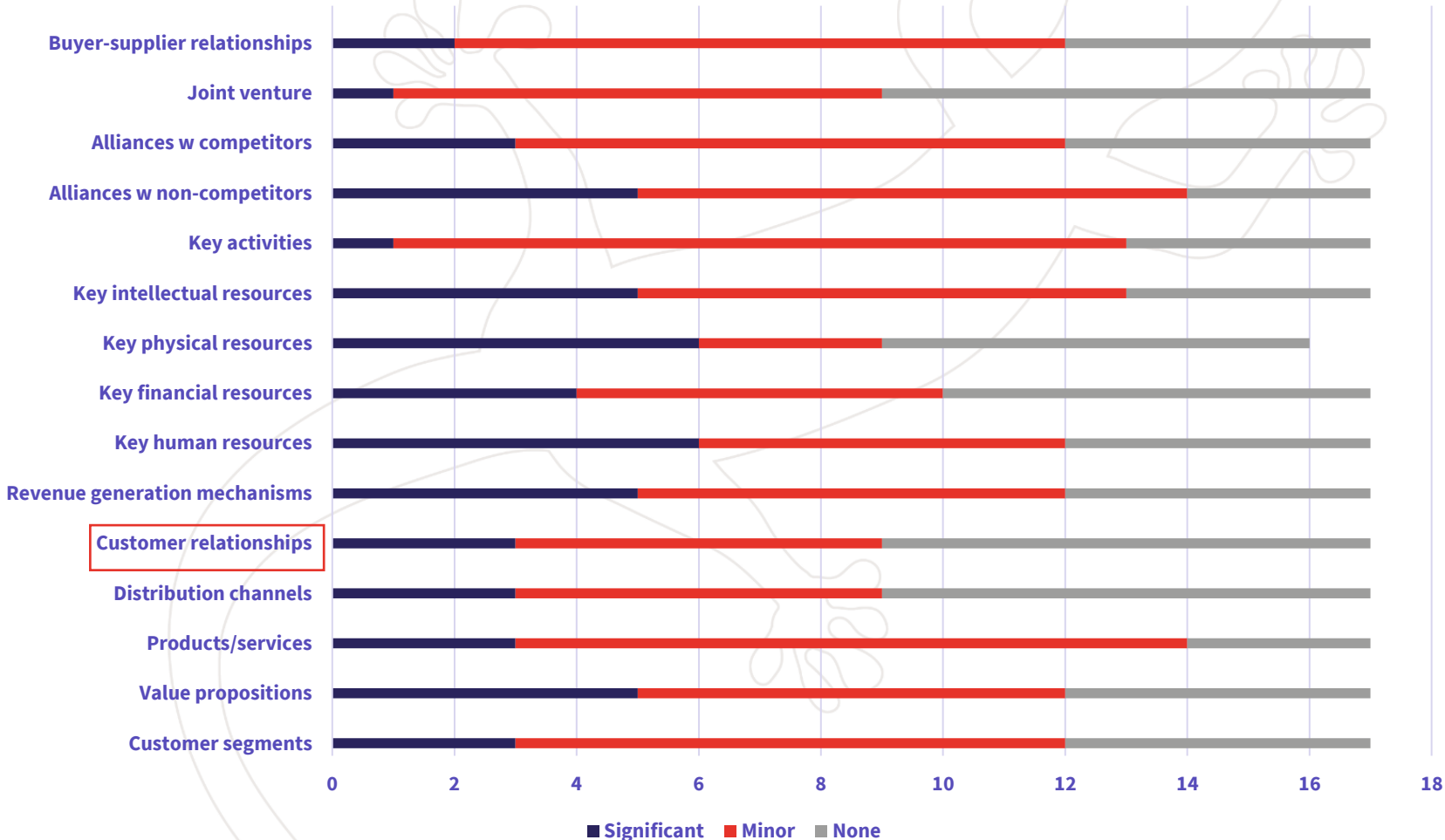


Changes in Distribution Channels:

- Shift towards digital ticketing necessary
- Some services need to be present in Maas applications
- Through national / government agencies

Survey Results

With reference to the Greener Communities scenario, to what degree would you need to change the following aspects of your business model to be successful in this scenario?

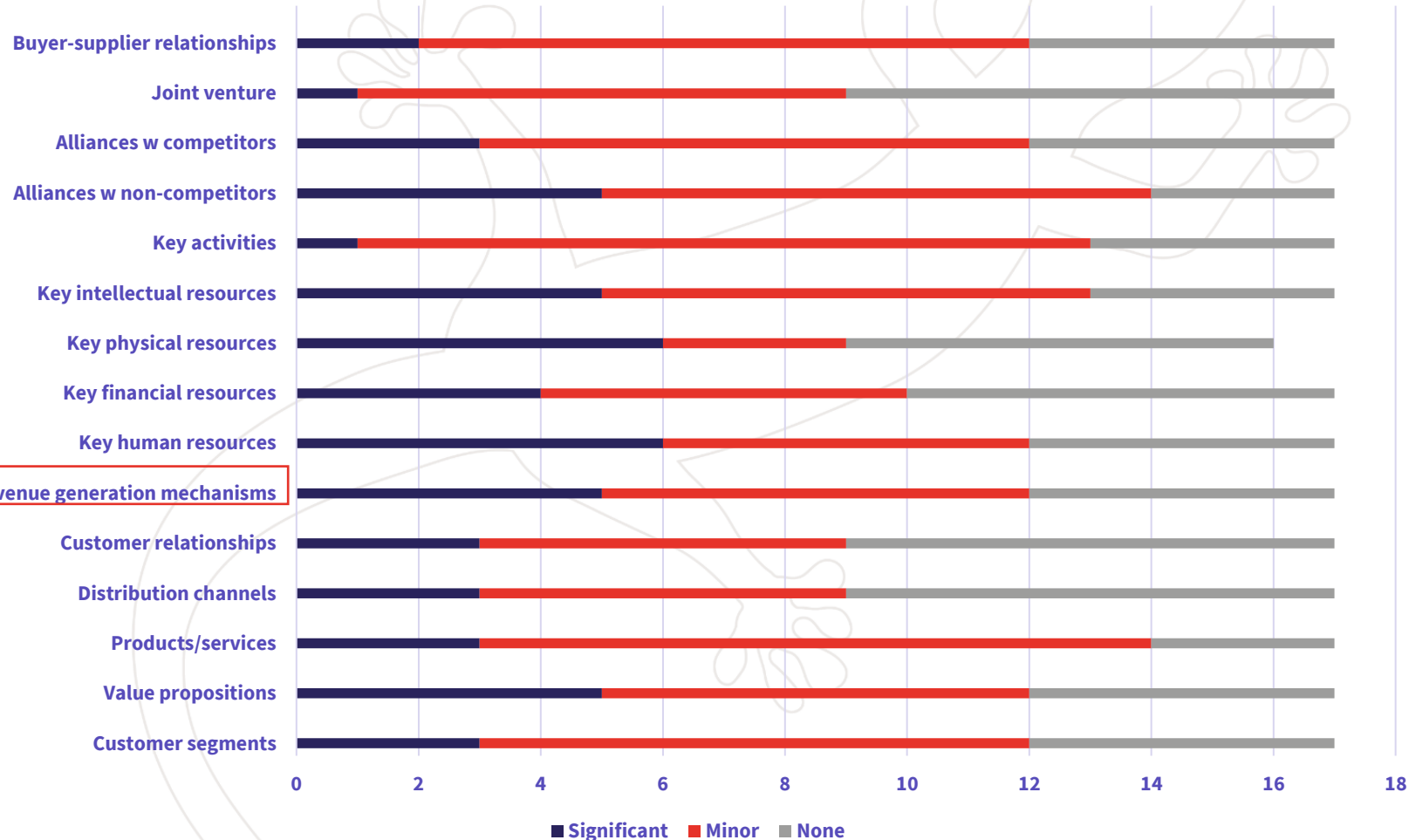


Changes in Customer Relationships:

- More automatization and digitalization
- Direct B2C & B2B with multilingual communications

Survey Results

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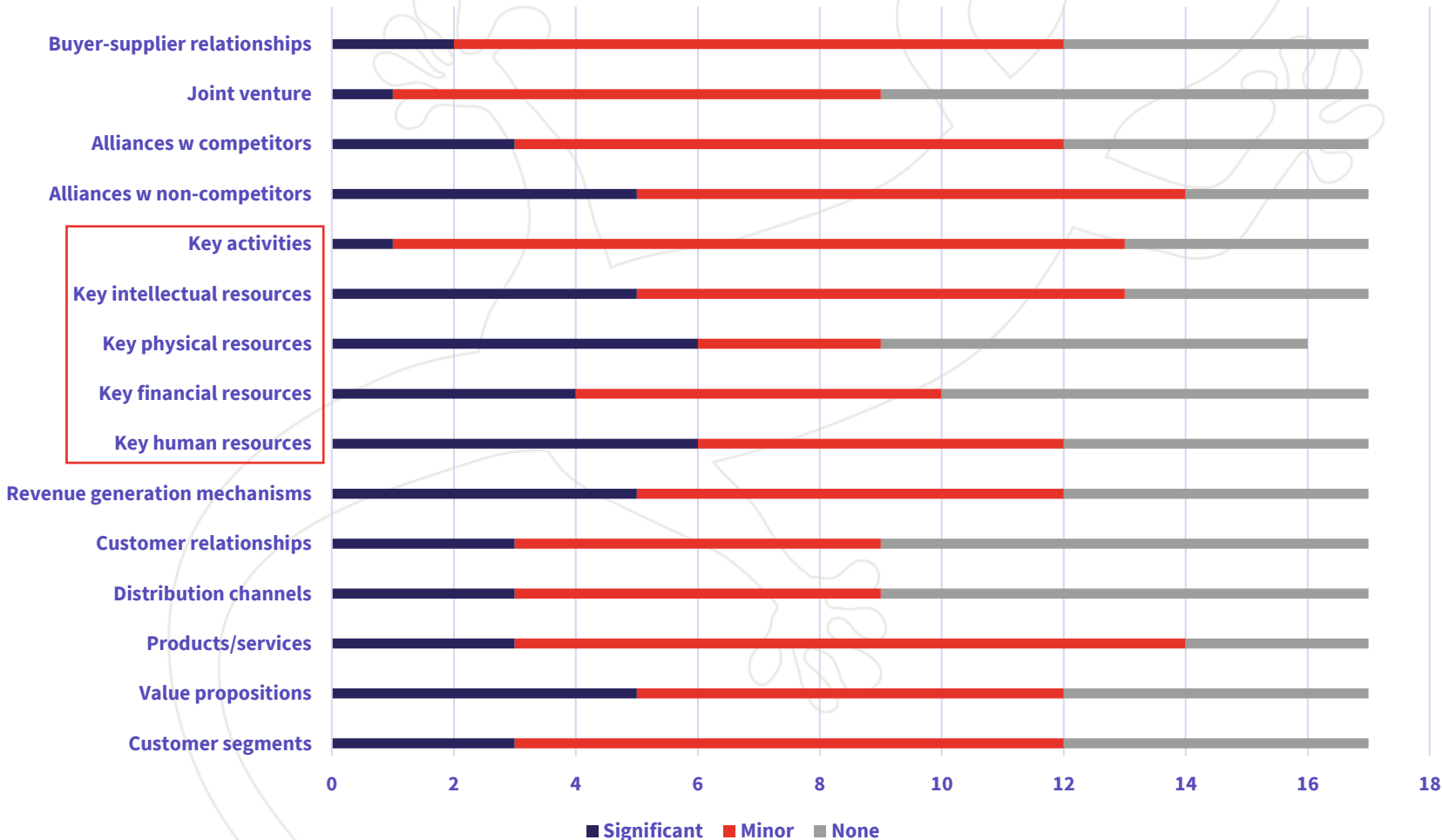


Changes in Revenue Generation Mechanisms:

- New service fee
- Public funding
- Annual, monthly, weekly or daily subscription fees supplemented with B2C rich media advertising, connecting community services through Geo-tracking

Survey Results

With reference to the Greener Communities scenario, to what degree would you need to change the following aspects of your business model to be successful in this scenario?



Changes in Human Resources:

- Data-driven design expertise
- Engaging with providers of new technologies and regulators

Changes in Financial Resources:

- Requires heavy investment unless is a PPP model
- Public Funding

Changes in Physical Resources:

- Transport infrastructure
- Evolve to provide new technology as it emerges
- Scalable design allowing mobility station

Changes in Intellectual Resources:

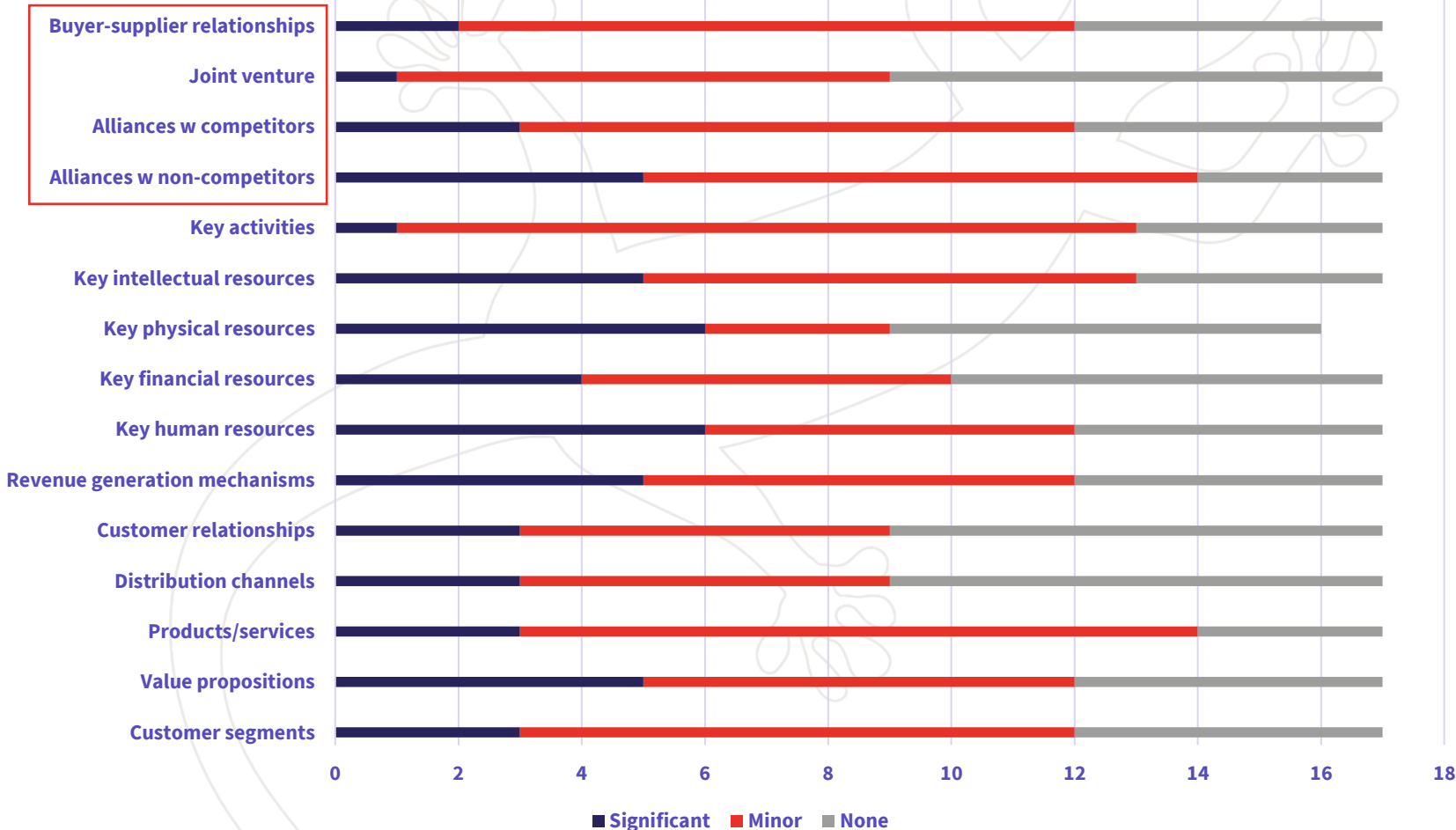
- The service design and the development of the AI
- Data expert
- Evolve to synchronise with new technology as it emerges

Changes in Activities:

- Secure 24/7 operation

Survey Results

With reference to the Greener Communities scenario, to what degree would you need to change the following aspects of your business model to be successful in this scenario?



Changes in Alliances with Non-competitors:

- Probably with Maas application
- Cities, transportation provider (train, bus, autonomous vehicles) are even more important than today

Changes in Alliances with Competitors:

- Mobility services are used by other companies who provide similar services

Changes in Joint venture:

- With large scale mobility provider and cities

Changes in Buyer-supplier Relationships:

- Shared revenue with licensee, provides funding for network expansion

Thank you for your participation

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