

Multimodality and MaaS



8th June 2018

What is the role of road concessionaires?



Organized by



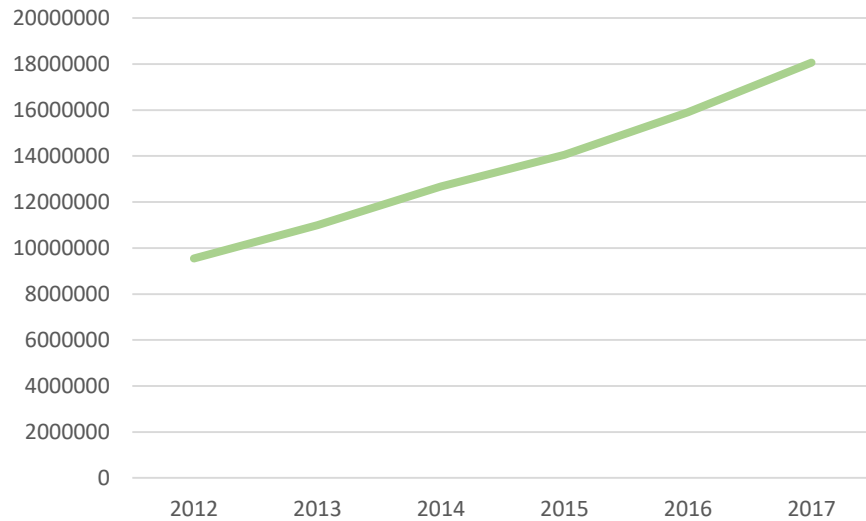
THE ROLE OF ROAD CONCESSIONAIRES – PERSPECTIVE OF AN ETC PROVIDER



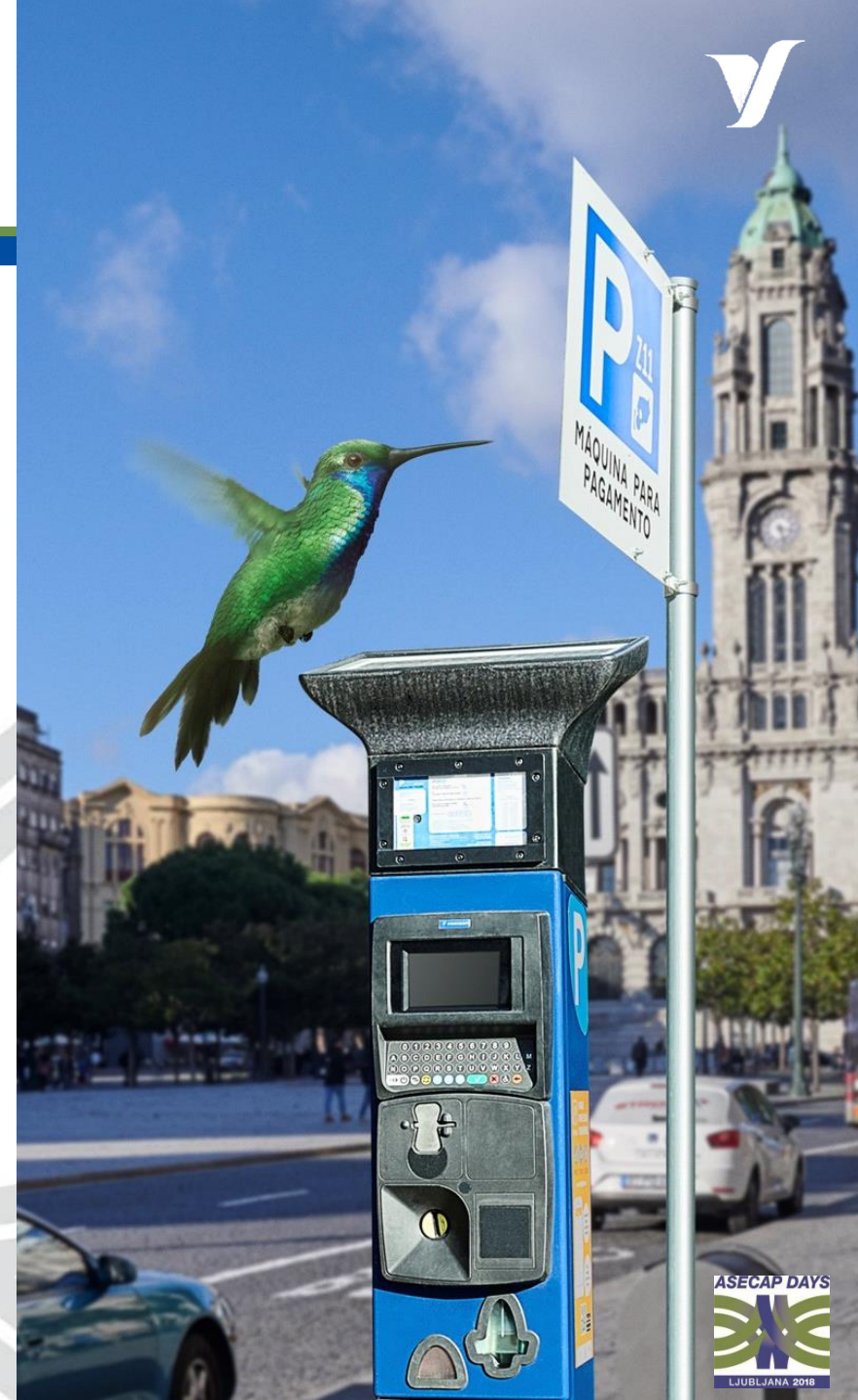
THERE IS AN INDIRECT BENEFIT FOR ROAD CONCESSIONAIRES REGARDING MOBILITY AS A SERVICE OFFERS BY ETC PROVIDERS

WITH MATURE CONCESSION BUSINESS THERE WAS A STRONG PUSH FOR VALUE ADDED SERVICES

Value Added Services Progress

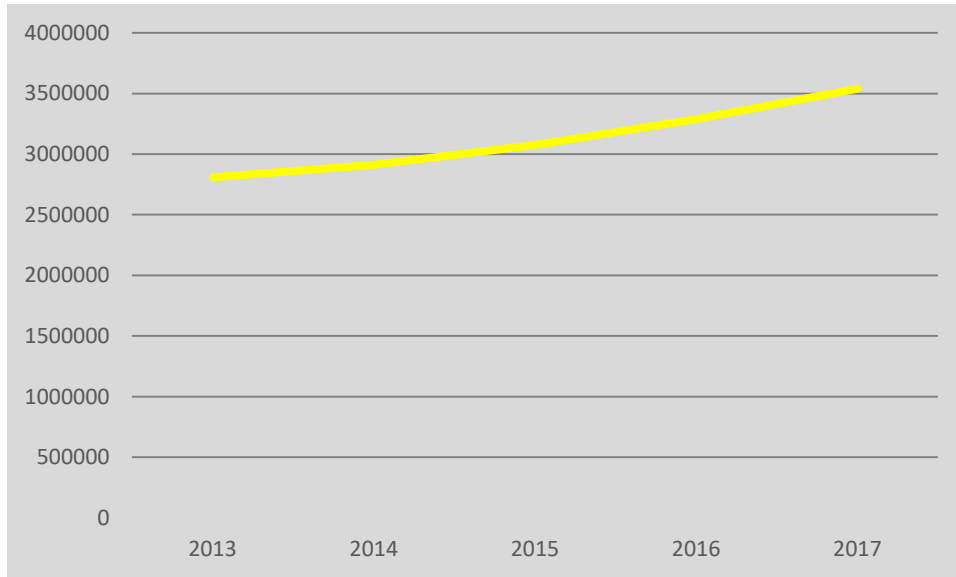


INCREASING GROWTH IN MOBILITY AS A SERVICE OFFER ESPECIALLY SINCE 2015



LET'S SEE ... WHAT HAPPENED AT CLIENT GROWTH

Even with high maturity levels in highways, there was an increasing growth in clients since 2015

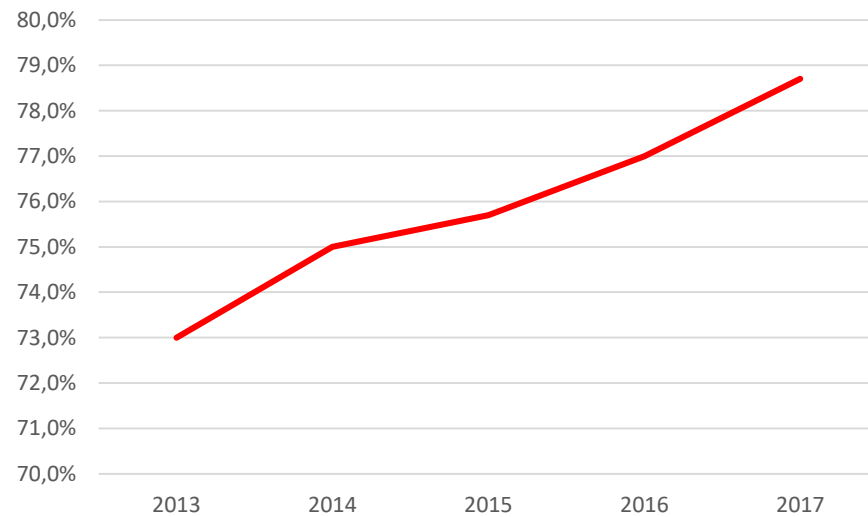


2017 was one of the best years ever: + 320k clients



LET'S SEE ... WHAT HAPPENED AT HIGHWAYS

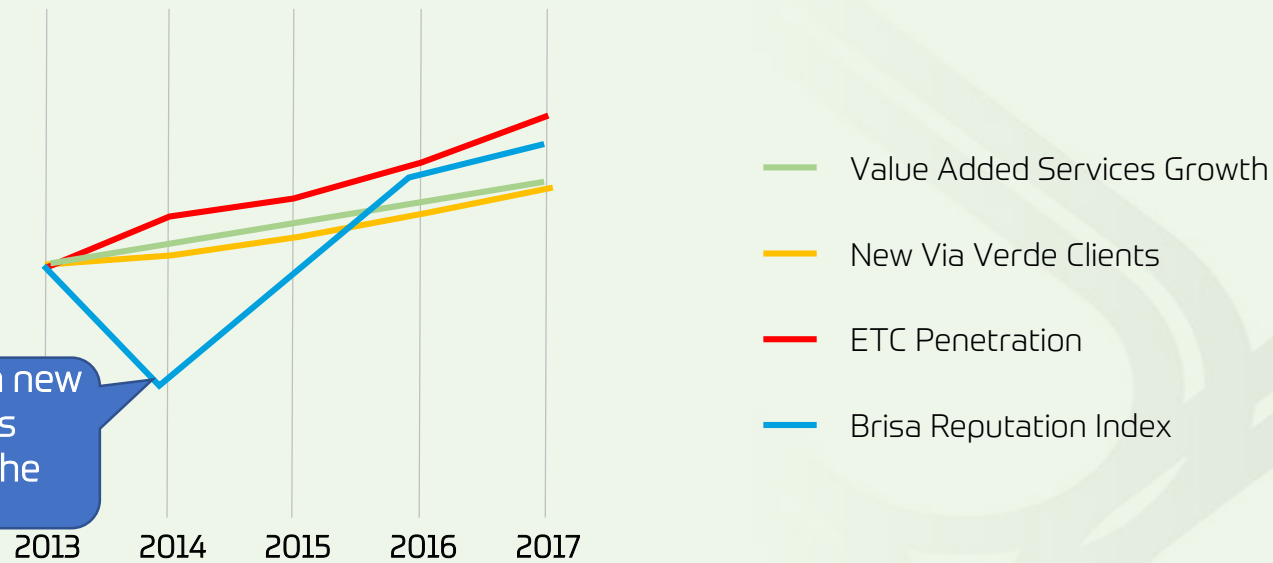
Consequently ETC penetration growth is also increasing



In 2018 we are achieving record penetration rates of 80%



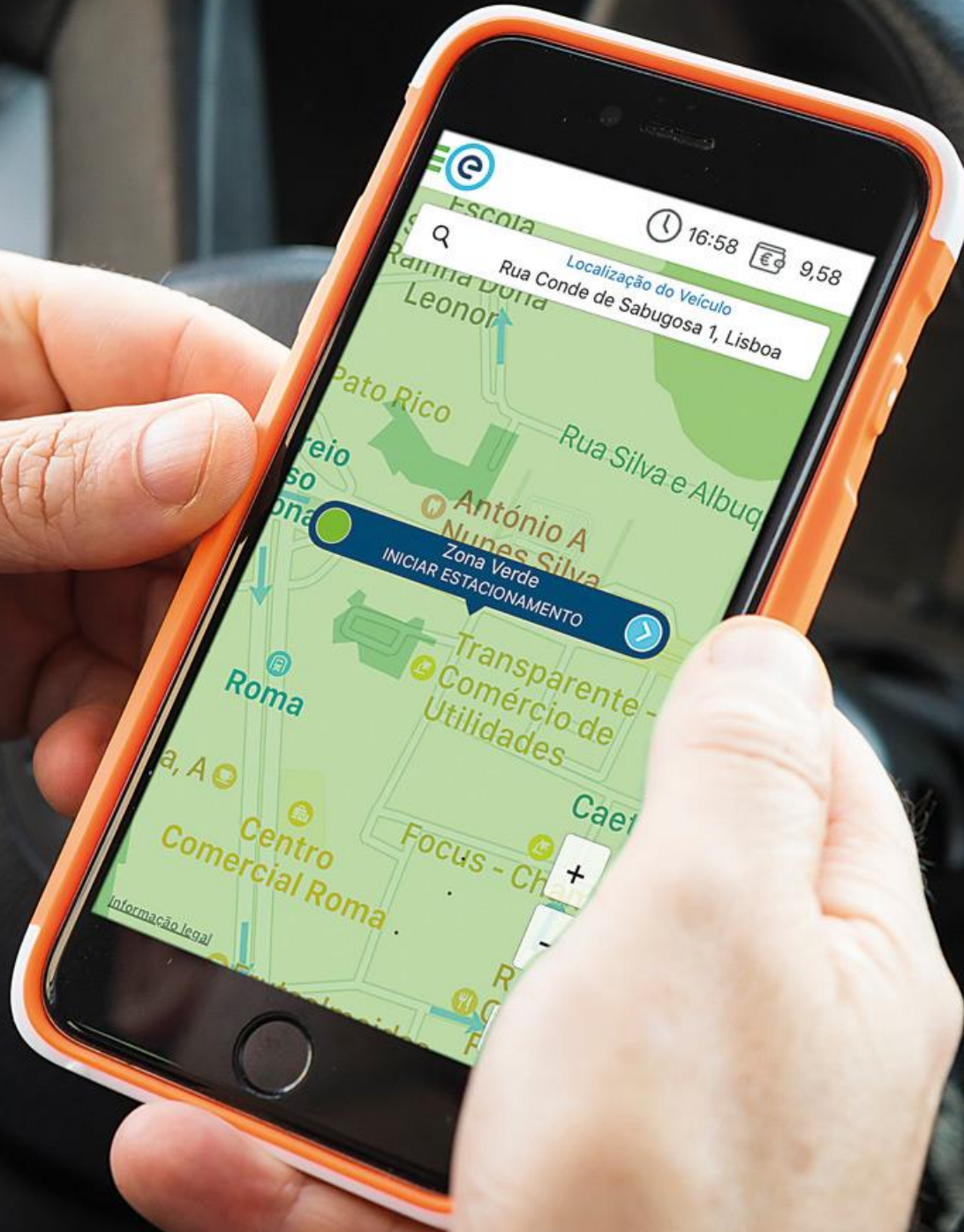
COMBINING INDICATORS...



Specific effect with new Tax Authorities intervention in the process

There is a positive impact in road concessionaires from Mobility as a Service initiatives by ETC providers

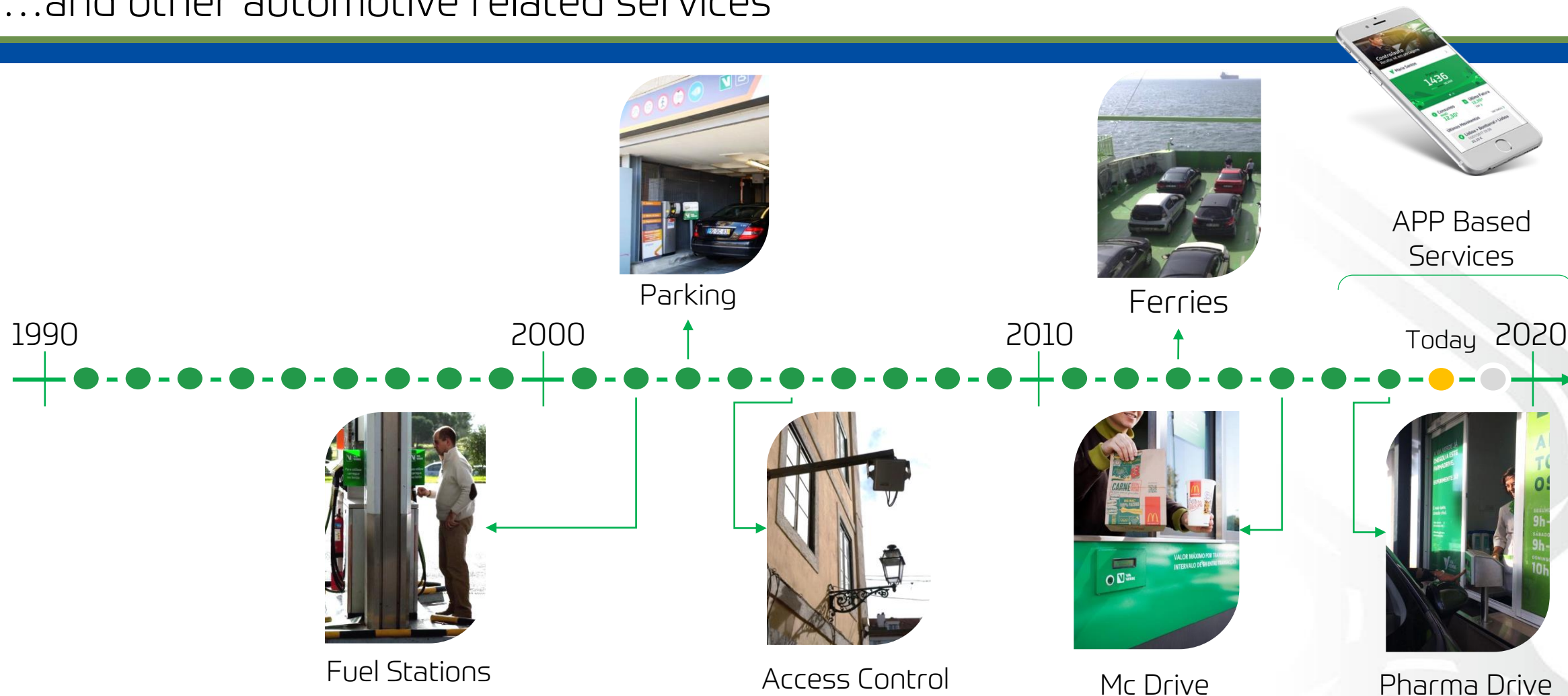
**FROM
ETC TO
MAAS**



VIA VERDE PORTUGAL | WHAT HAVE WE DONE SO FAR



...and other automotive related services



Universal and highly convenient access & payment experience as key success factors

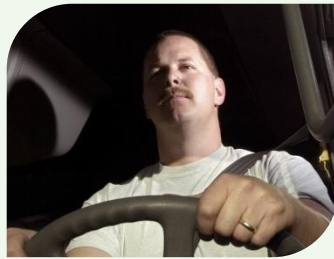
VIA VERDE PORTUGAL OFFER TO CLIENTS & OPERATORS



DEMAND



Private customers (B2C)

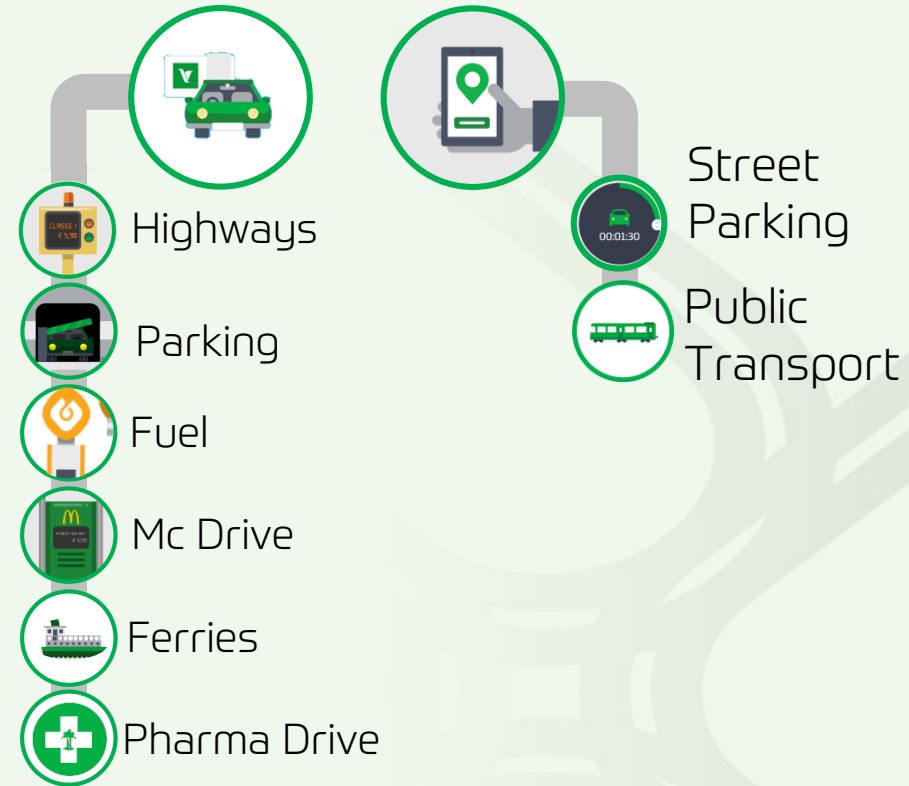


Corporate customers (B2B)



Banking System

OFFER



Same value proposition to clients in every service



3,6 million
customers

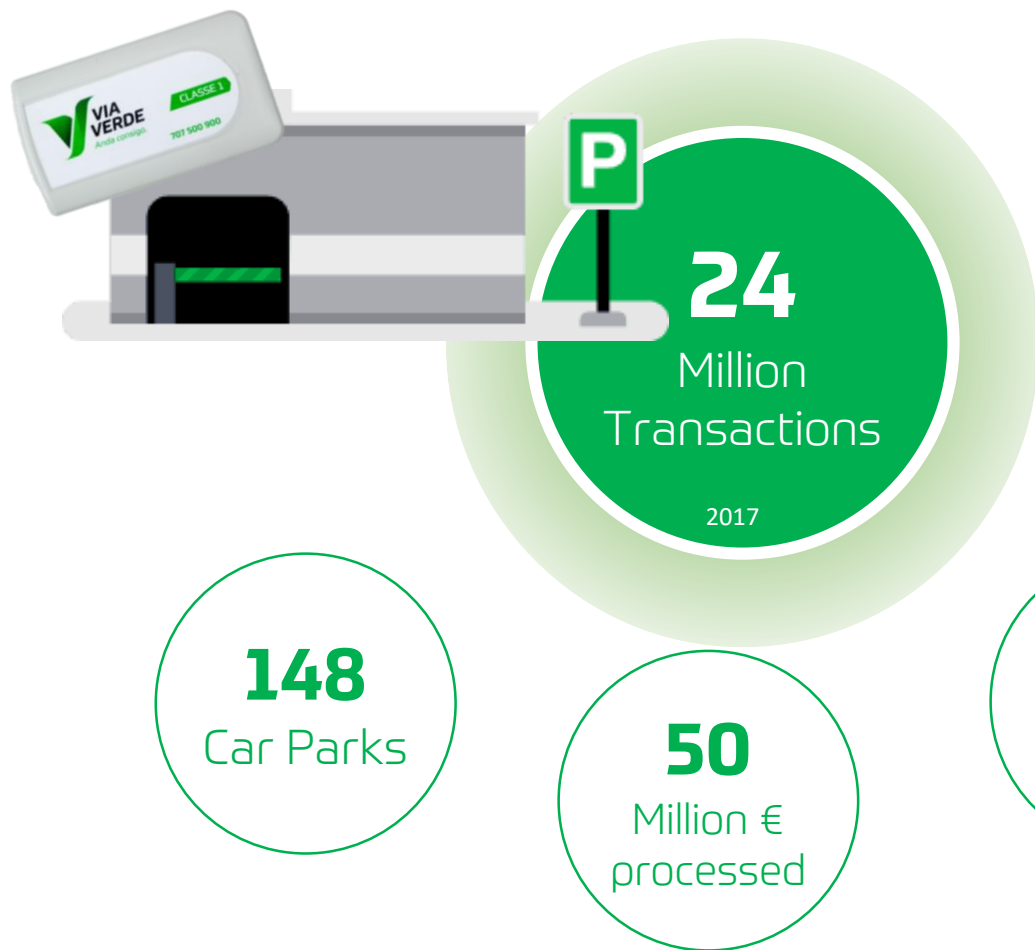


+750k
Downloads



56%
OBU equipped vehicles

OFF STREET PARKING



More than **70%** penetration in larger car parks



ON-STREET PARKING

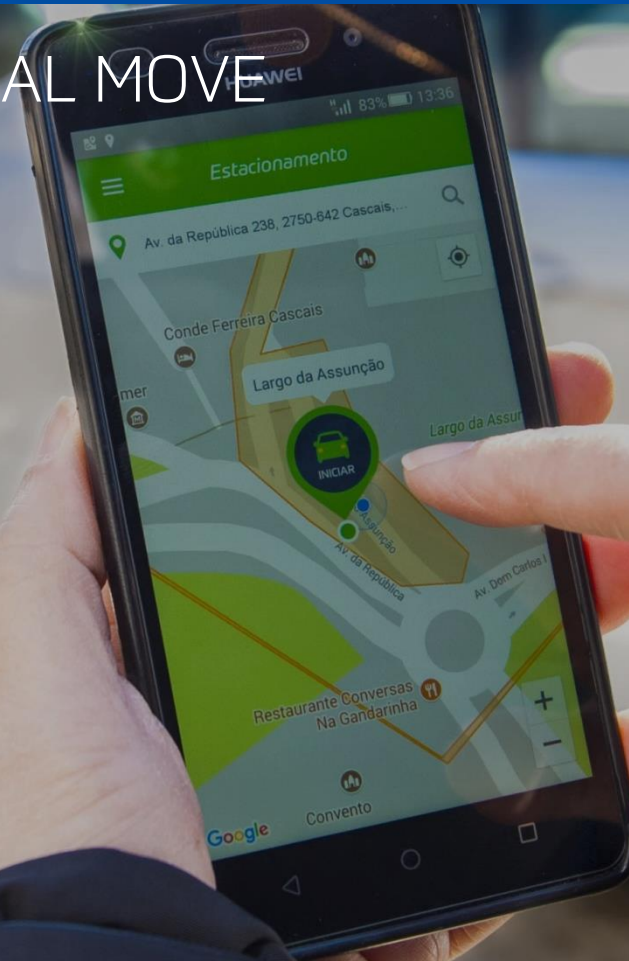


FIRST APP BASED SERVICE | A NATURAL MOVE

NO COINS

POST PAID

NATIONAL
COVERAGE



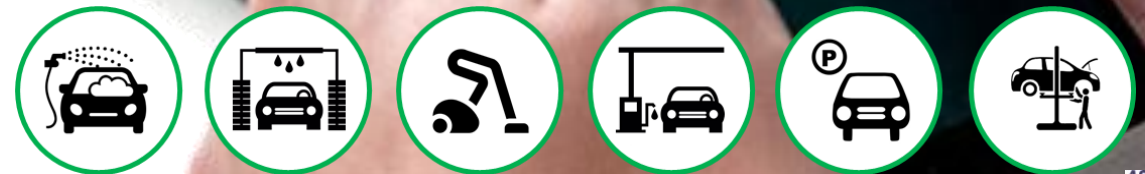


Services based on a
Local Access Mediator
and a Smartphone

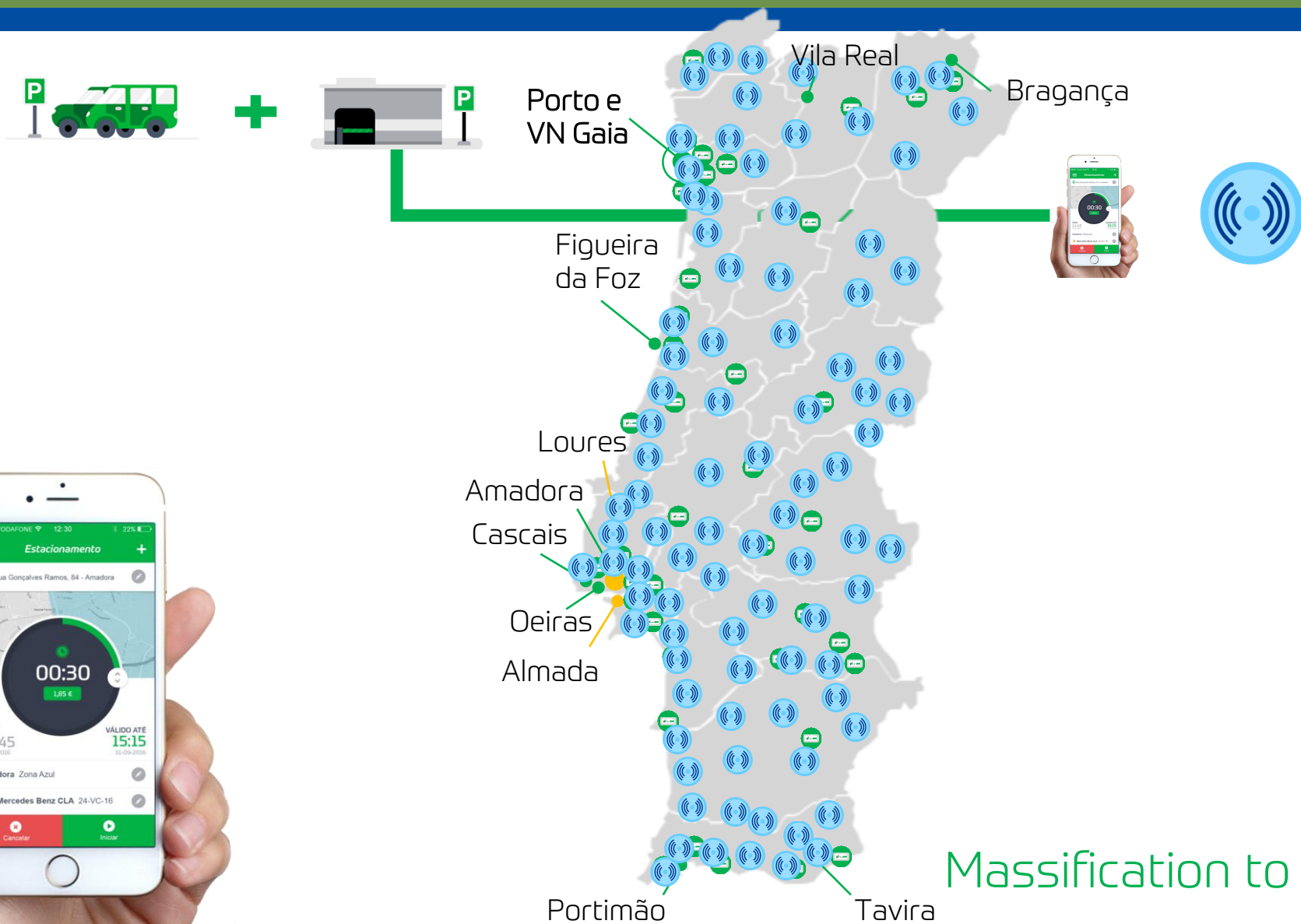


Hardware component that
enables new services

Short-Term Goal: fast expansion



ON STREET AND OFF STREET | A SINGLE SERVICE



Massification to increase experience

People-related Mobility





People

vehicle



OBU

Smartphone



Multiple Services

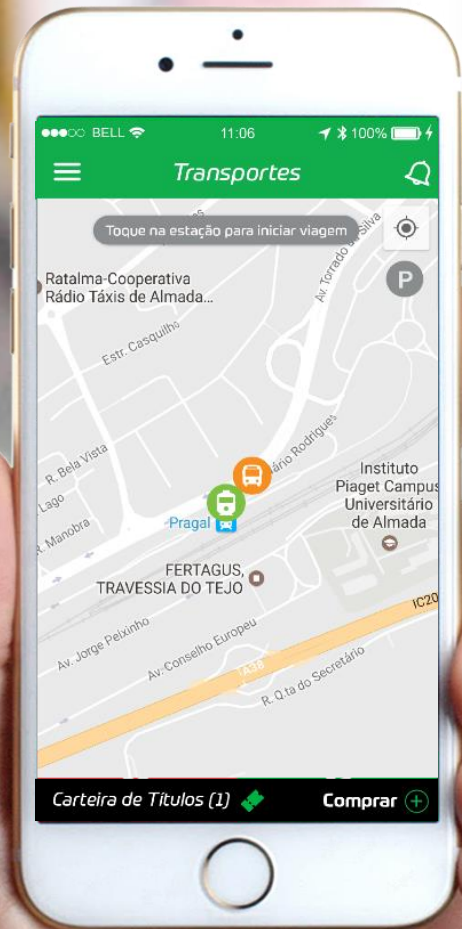


One payment method



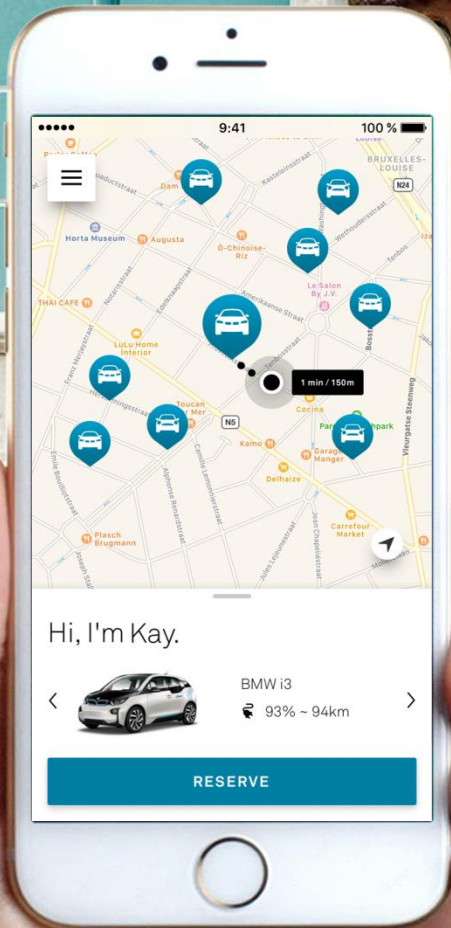
One Bill

The same value proposition: simplifying access and payment



PUBLIC TRANSPORT

Car Sharing in Lisbon | ADDRESSING A MARKET GAP



Registe-se já
10€
+30 minutos de
bónus



Powered by



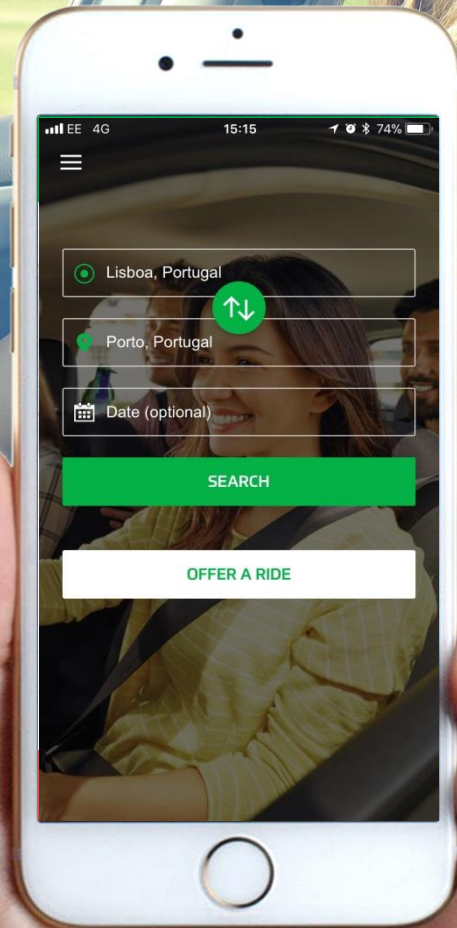
 **DriveNow**



Ride Sharing | RECENTLY LAUNCHED

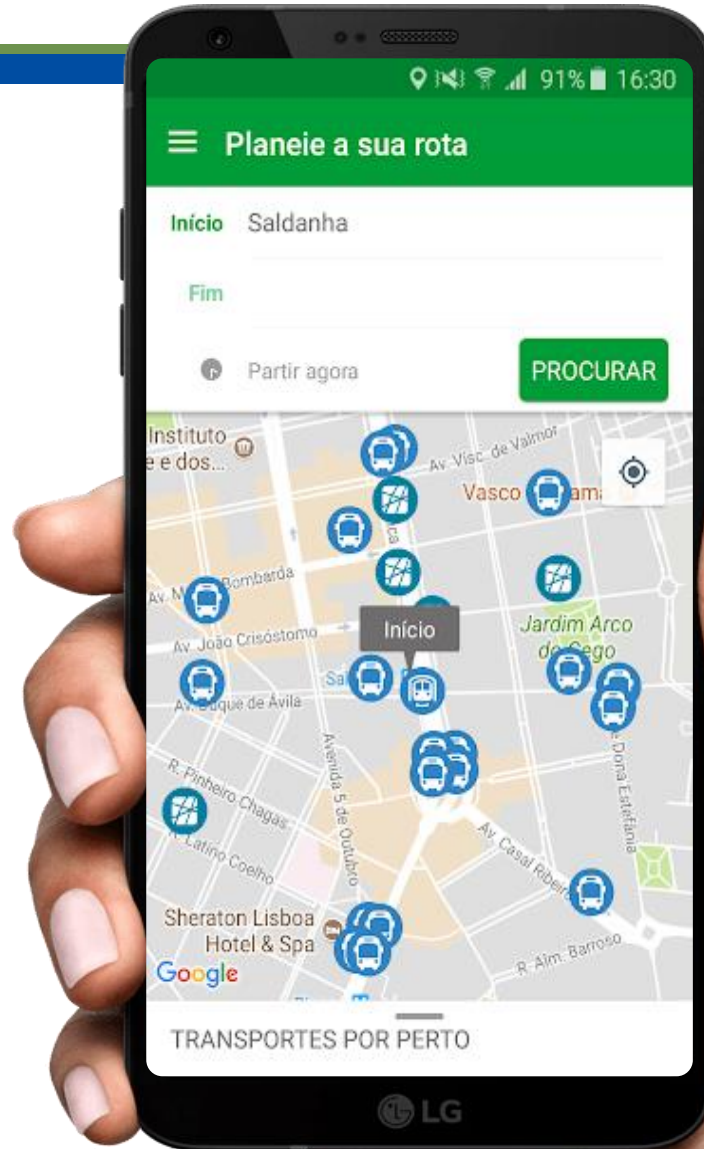


Targeting new generations

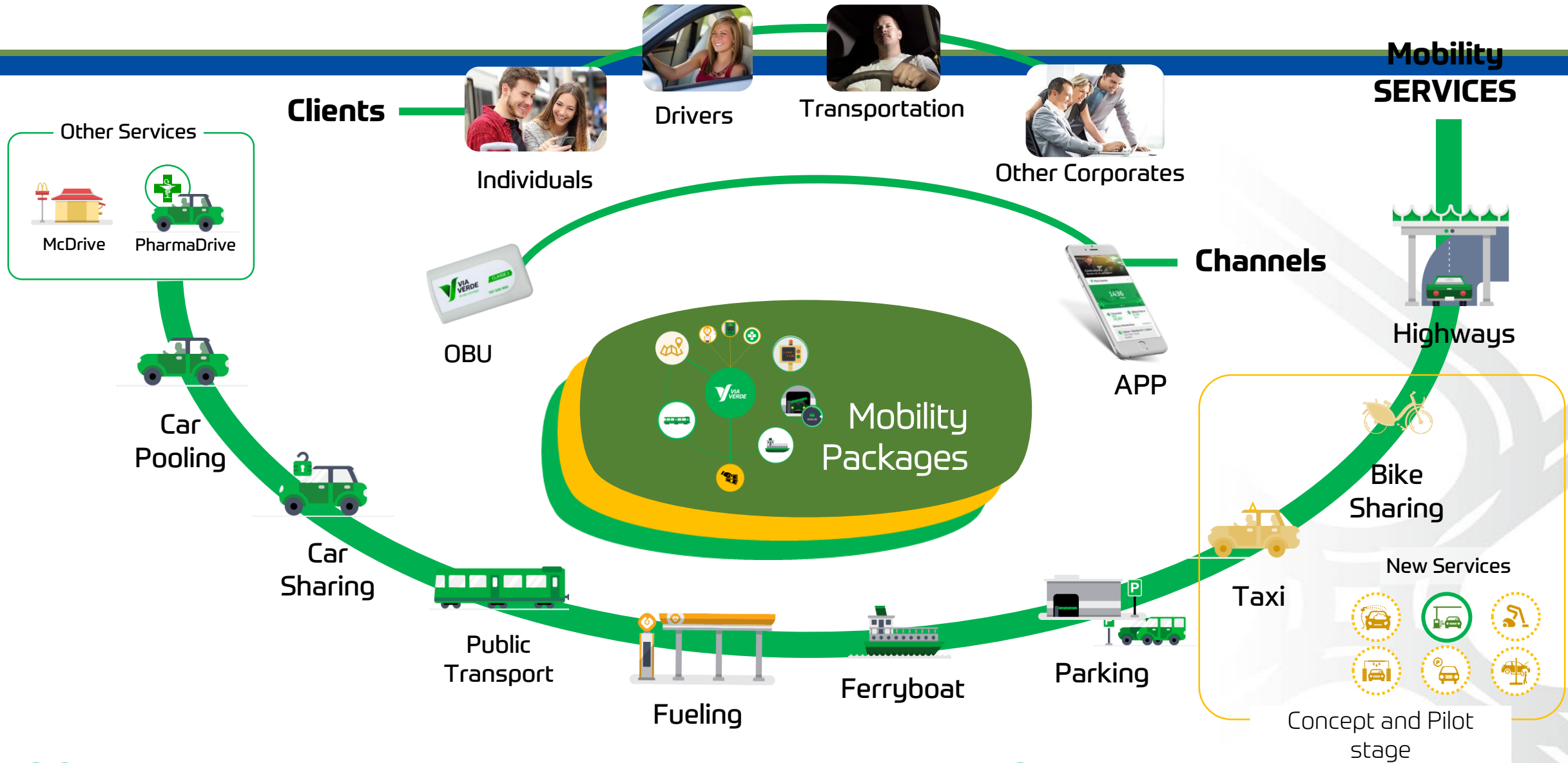




FROM
A-TO-BE



SETTING THE FRAMEWORK FOR MaaS FULL DEPLOYMENT



BOOSTING CLIENT BASE, PAYMENT LINK AND MULTIMODALITY



THE LOOP CAN BE CLOSED

Multimodality and MaaS



Thank You

What is the role of road concessionaires?