



**VERRA
MOBILITY™**
Safe. Smart. Connected.



> The price of mobility

VERRA MOBILITY EUROPE

Making mobility safer and easier

6

OFFICES

75

EMPLOYEES

23

LANGUAGES

Local presence

- › Amsterdam, Netherlands (Europe HQ)
- › London, England
- › Paris, France
- › Budapest, Hungary
- › Madrid, Spain
- › Lisbon, Portugal
- › Dublin, Ireland

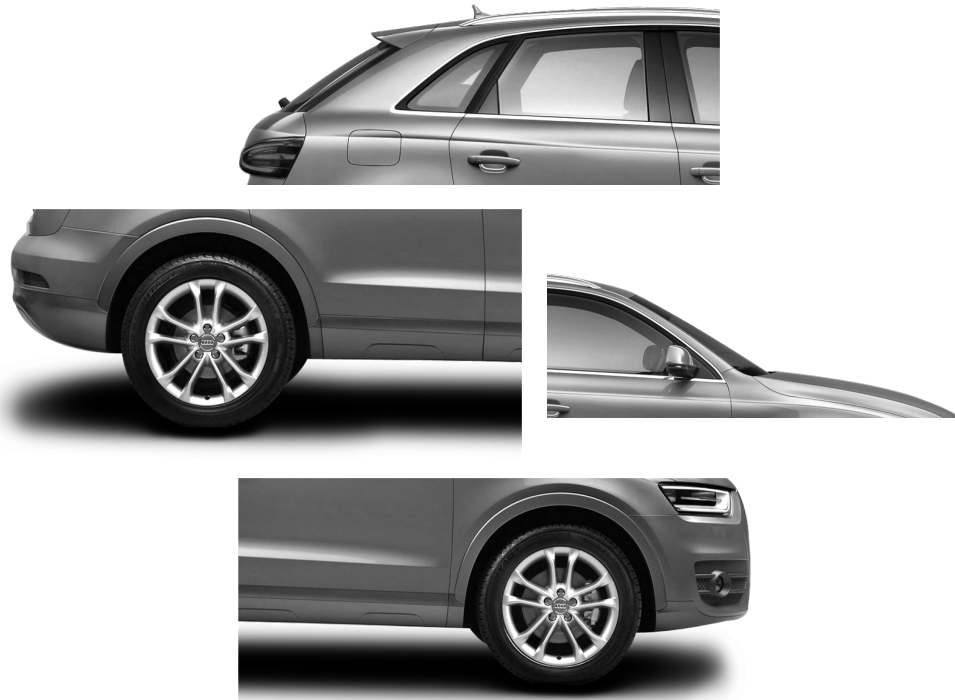




Increasing complexity of RUC

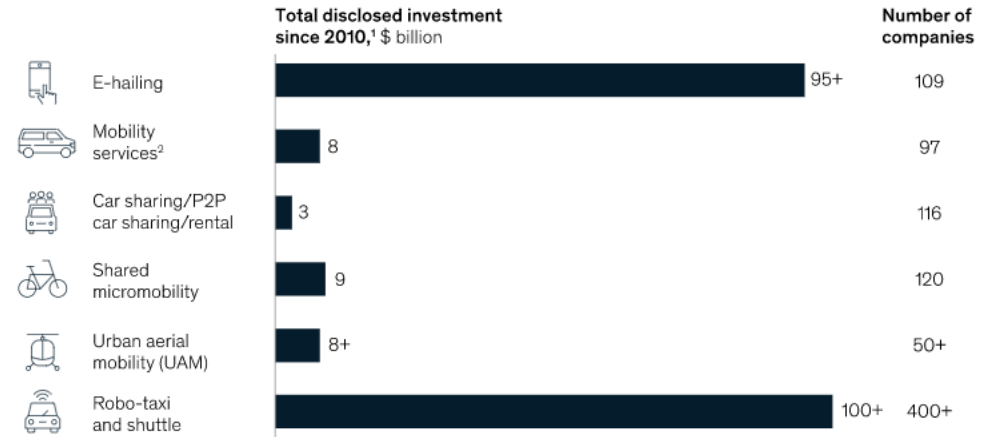
- › EETS Directive
- › Environmental concerns, congestion
- › Shift to distance-based toll pricing
- › Equity, different road users' needs
- › Shared mobility challenges

> Shared mobility is here

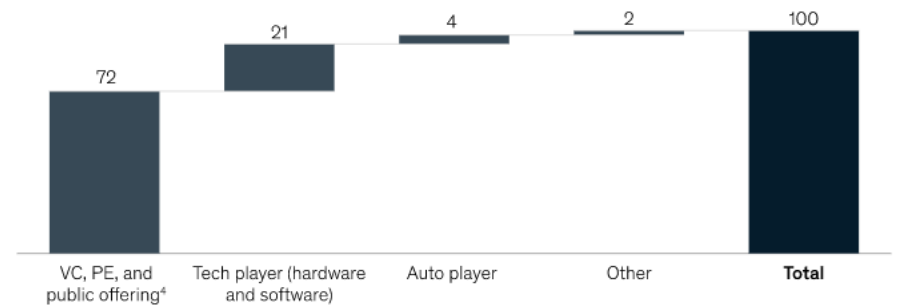


More than \$100 billion has been invested in nonautonomous shared-mobility companies, mainly by venture capital and private-equity players.

Investments in shared-mobility companies since 2010¹



Total disclosed investment amount since 2010 by investor type, percent of total³



¹As of June 2021.

²Includes ride-pooling, mobility-as-a-service players, etc.

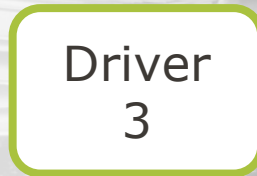
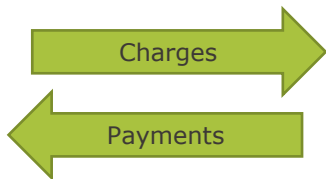
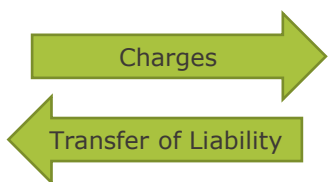
³Figures may not sum to 100%, because of rounding.

*Venture capital; private equity.

Source: Capital IQ; McKinsey Center for Future Mobility; McKinsey Growth Analytics – Horizon Scan; PitchBook

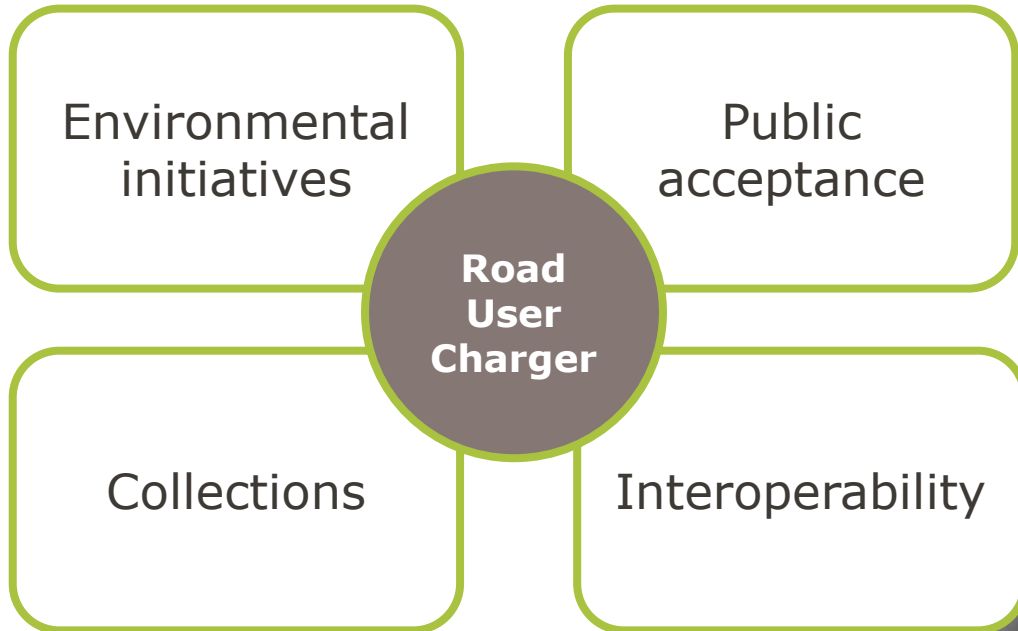


Payment collection challenges





Outcomes to ensure





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> Questions?

