



ESP Group

Life made simple

Mobility as a Service

 Journeycall

 Systex

 Viaqqio

ESP Group

We make transport work for millions of travellers every day through integrated customer support services and technology

Supporting the traveller Supporting the industry

Our Group comprises of:

Systemx

Smartcard fulfilment and software development

Journeycall

Blended unscripted contact centre support, fulfilment services, delay repay, passenger assist

Viaqqio

Future mobility design, visioning and IP creation

Selected customers & partners

<p>Mobility services</p>	
<p>Major transport groups</p>	
<p>Megacity</p>	
<p>National schemes</p>	
<p>Regional and metropolitan transport authorities</p>	

The market

Mobility services	Mobility as a Service MaaS growing from (2016) \$860 billion pa market to (2025) \$2 trillion.
Major transport groups	Autonomous Vehicles The global market AVs expected to reach £4.8 billion by 2025. This is a CAGR of 58%
Megacity	Intermodal Ticketing The global market for intermodal smart ticketing is expected to reach £18.1 billion by 2025 (CAGR of 8%.)
National schemes	Sharing in Transport The global car sharing market is expected to grow from 7.9m to over 36m people (2015-25)
Regional metropolitan transport authorities	<ul style="list-style-type: none">• Near Field Communication and Host Card Emulation will drive integrated schemes• 97 m contactless cards in issue in the UK (debit (66.3m) and credit (30.8m)) (2016)

What is MaaS?

- MaaS is when users can purchase and use mobility and transport products and services based on their actual needs.
- MaaS is instead of owning the means of mobility (eg. a car?).
- The package of mobility should meet their lifestyle.
- OEM push for car as a service: developing new products and services; acquiring start ups.
- 7 OEMs have created mobility companies.

Mobility as a Disservice

Golden Lesson 2: Make it obvious...in black and white

Steve Car Free 2 Comments

Car Free Familydom means lots of payments being made for mobility. Any modern family has loads of payments to make to many organisations, but in (my) Car Free Family there are many mobility payments. My last week's payments were:

1. Standing Order Bus Pass (actually paid by my employer) TO LOTHIAN BUSES
2. Individual bus tickets for Maddie TO LOTHIAN BUSES
3. Monthly pass for Tess TO LOTHIAN BUSES
4. Individual book of bus tickets for Tess - TO LOTHIAN BUSES (she was away a lot of the month and thus when this month ran out she didn't renew as she wouldn't get the money's worth this month)
5. Taxis - for me + at least one other kid TO CITY CABS EDINBURGH
6. Taxis for me alone - usually paid by work- TO CITY CABS EDINBURGH
7. Tess taxi back from friend's very late TO CITY CABS EDINBURGH
8. Maddie taxi back from friend's while I was at work and no buses for a while TO CITY CABS EDINBURGH
9. Paying for my Mum's taxi TO FLEETWAY'S YORK
10. City car club invoice CITY CAR CLUB
11. Parking payment EDINBURGH CITY COUNCIL
12. Parking ticket - oops - I was in Gardenlady's car EDINBURGH CITY COUNCIL
13. Booked car hire for holiday and flights HERTZ - I THINK



Make it obvious



People assume

It's the extras

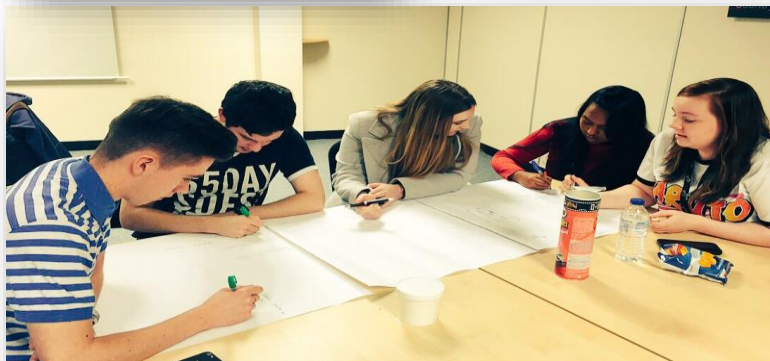


I'm into car features



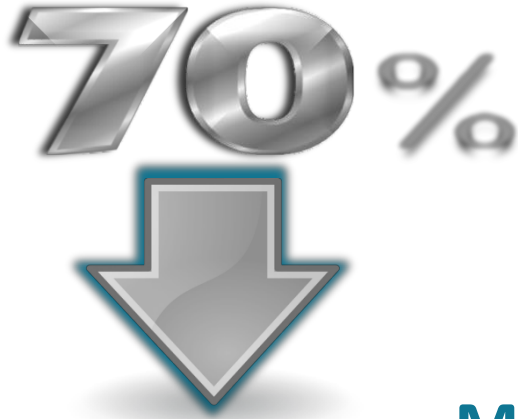


Co-design at the heart



A Platform Business

- Purpose of a *platform* is to consummate matches between users, facilitate the exchange of goods, services or social currency.
- Social currency can be social interaction of any form, games, chat, mutual support.
- Platforms derive much of their value from the communities they serve.
- Traditional *pipeline* businesses = linear value chain.
- Platform business = value matrix.



Reduced Processing Time

Enhanced Experience

Multiple Repayment Methods

RailTrax™ System





@espgrp @mobilitystories



The ESP Group

www.the-espgroup.com

www.upstream.scot

www.pickanmixproject.com



ESP Group

Life made simple

Terry Dunn

E: terry.dunn@the-espgroup.com

T: 01482 384 500

Theresa Wishart

E: twishart@Journeycall.com

T: 01241 730 300

Steven Cassidy

E: steve.cassidy@the-espgroup.com

T: 0131 473 1594

Lesley Stewart

E: lesley.stewart@journeycall.com

T: 01241 730 300



Journeycall



Systemex



Viaqqio