



kapsch >>>
challenging limits

Kapsch TrafficCom

2nd Institutional Investors' Day.

Peter Ummenhofer: Intelligent Mobility Services.

September 18, 2018

Agenda.

- 1. Introduction IMS@Kapsch**

- 2. Tolling Services Europe (tolltickets)**

- 3. Integrated Mobility Services (Fluidtime)**

Major trends in the mobility market ...

... leading to an increasing demand for intelligent mobility services.

- > There are several trends driving the emergence of mobility services
- > In a nutshell ...
 - Users are always online and change their behavior (e.g. sharing)
 - Transport infrastructure becomes digitalized
 - Vehicles will be connected and become autonomous

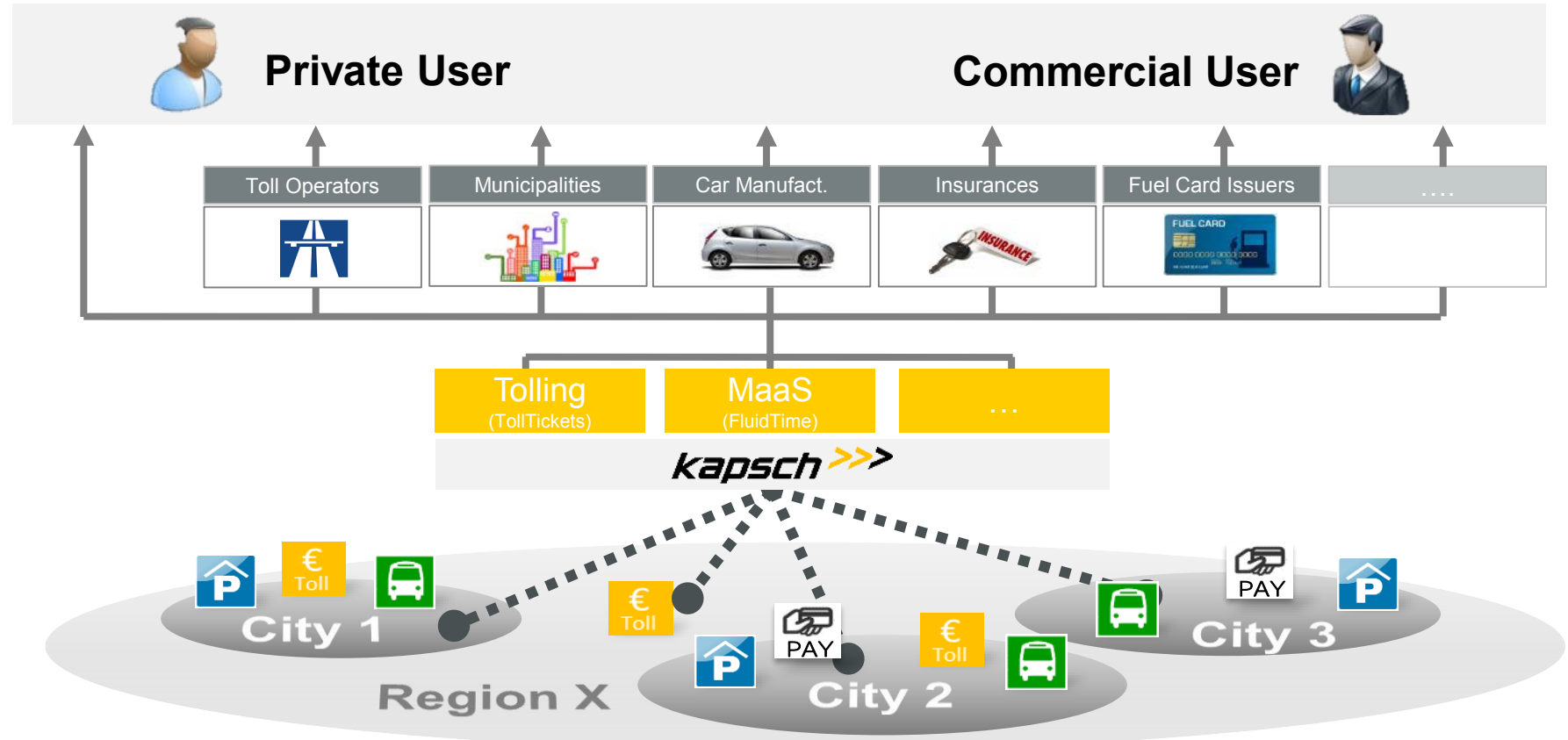
- 1** **Urbanization** (traffic challenges as more and more people are living in cities)
- 2** **New user behavior** (e.g. sharing of transport means, always connected)
- 3** **New business models** (e.g. Mobility-as-a-Service)
- 4** **New forms of road traffic** (connected and autonomous)
- 5** **New smart infrastructures** (digitalization of infrastructure, IoT etc.)
- 6** **New ITS solutions** (e.g. multi-modal and integrated)

Intelligent mobility services vision of Kapsch:

Enable end-users to seamlessly pay for mobility using a single account.



- > Kapsch TrafficCom has initiated several mobility services initiatives
- > The majority are related to the idea to establish Kapsch as leading mobility payment services provider
- > For this Kapsch has invested in tolltickets (tolling services) and Fluidtime (MaaS services)



Kapsch's mobility payment services initiatives:

tolltickets and Fluidtime.

- > Two initiatives ongoing
- > Investment into two startups: tolltickets (Rosenheim, GE) & Fluidtime (Vienna, AT)

tolltickets

Tolll, Tolll, Tolll!
Ich bin schlau!
Ich steh nie im Mautstau!



- Today: Vendor of tolling products for holiday drivers
- Goal: Establish Kapsch as an European-wide Tolling Services Provider (EETS)

Fluidtime

FLUIDTIME
TRANSFORMS
YOU INTO A
MOBILITY
SERVICE
PROVIDER



- Today: Vendor of an integrated mobility platform
- Goal: Establish Kapsch as a leading mobility platform vendor complementing Kapsch's urban solutions portfolio

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tolltickets.

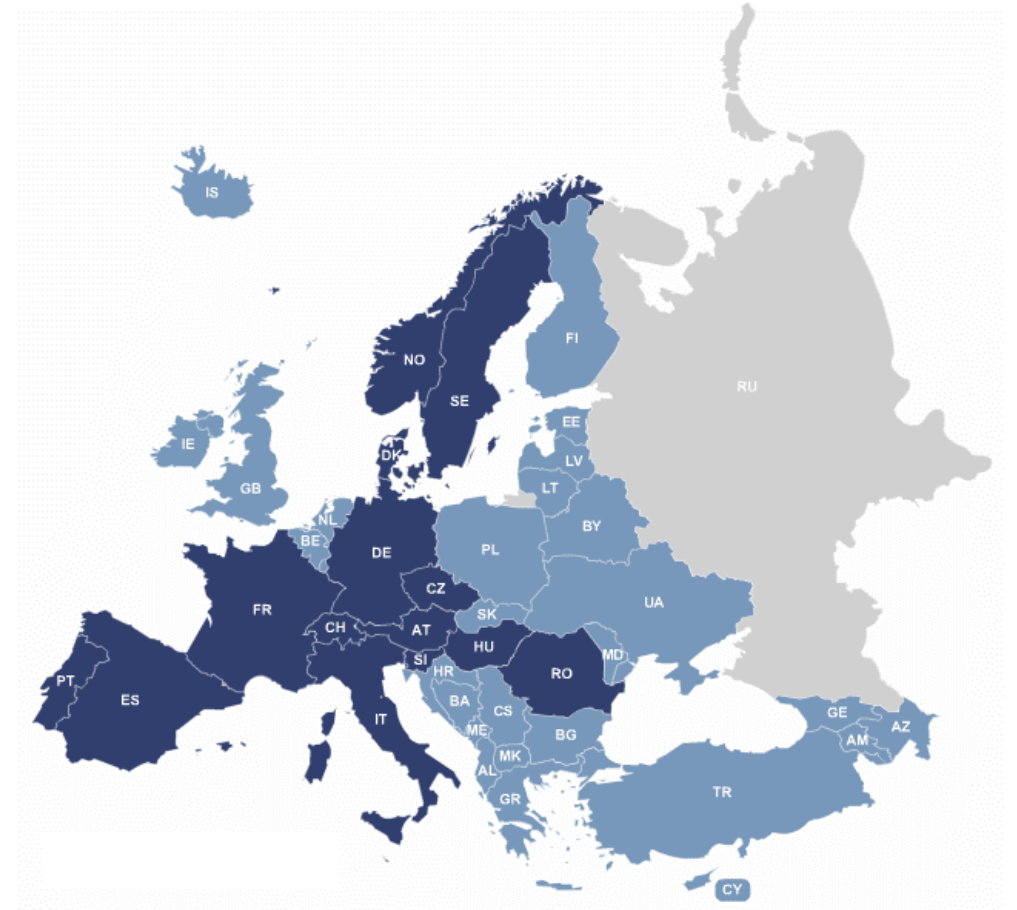
Kapsch TrafficCom's tolling services unit.

Facts & Figures:

- > Headquarter: Rosenheim, Germany
- > Founded in 2007
- > 25 employees
- > Since Feb. 2018: Registered EETS Service Provider

Current Portfolio:

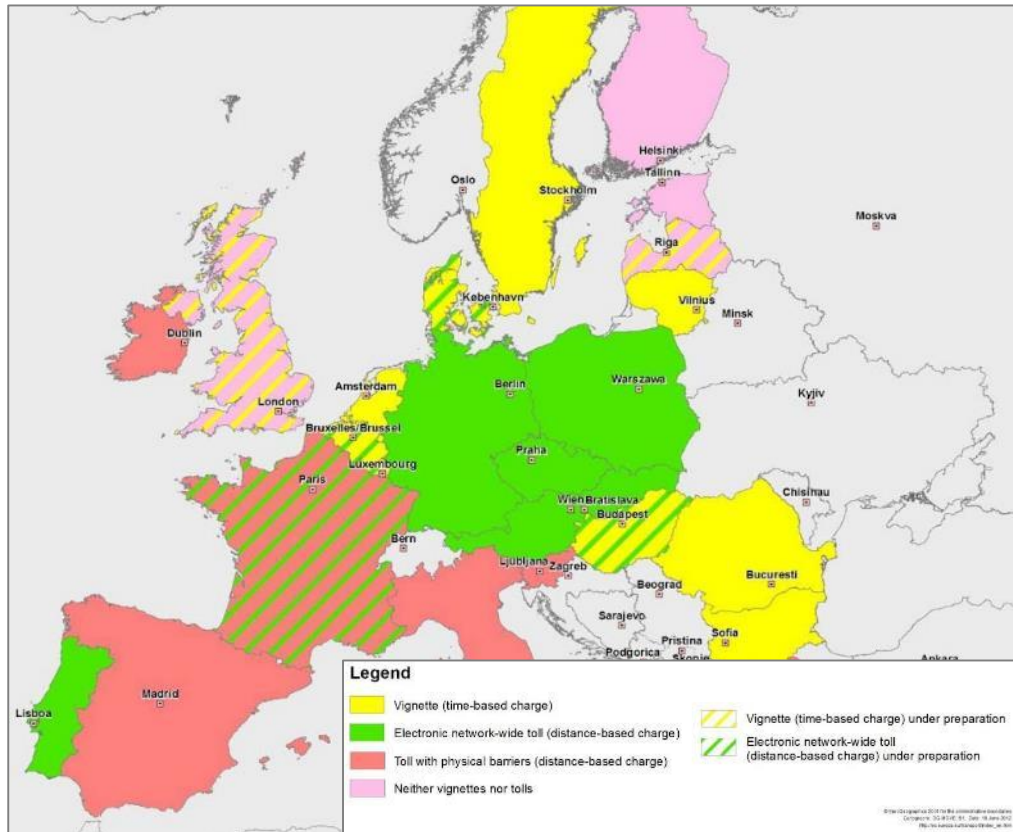
- > Tolling products (vignettes and distance tolls) for private users (e.g. holiday drivers) in Europe
- > White labelled toll services for fuel card issuers and other HGV/LV services providers in Europe



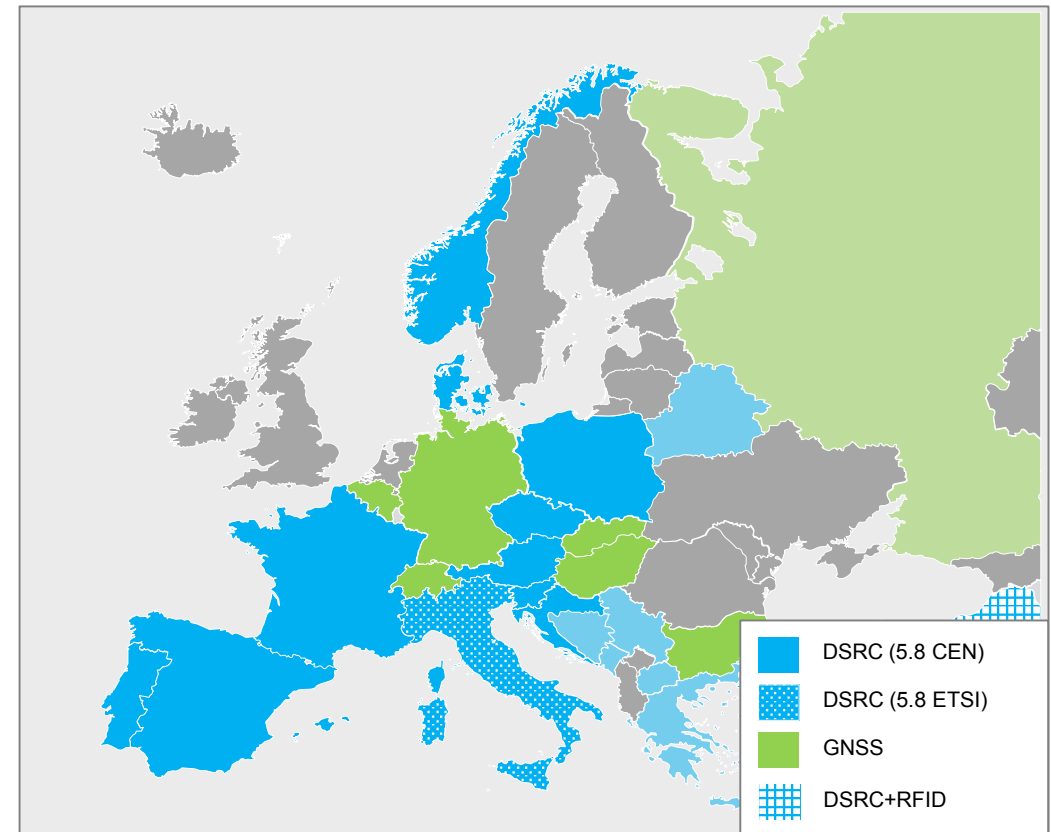
Tolling environment in EU.

Fragmented, different schemes & technologies, no roaming for tolling, differences in HGV and LV tolling.

Tolling schemes in Europe



Tolling technologies in Europe



European Electronic Tolling Services (EETS).

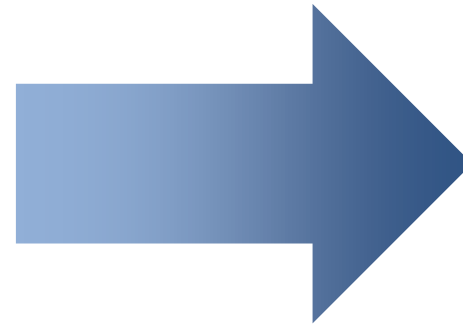
„Toll roaming“ based on an interoperable OBU and a single service contract.



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A kind of proliferation of On-Board Units on windshields in vehicles driving around in Europe:

Various OBUs and different invoicing schemes!

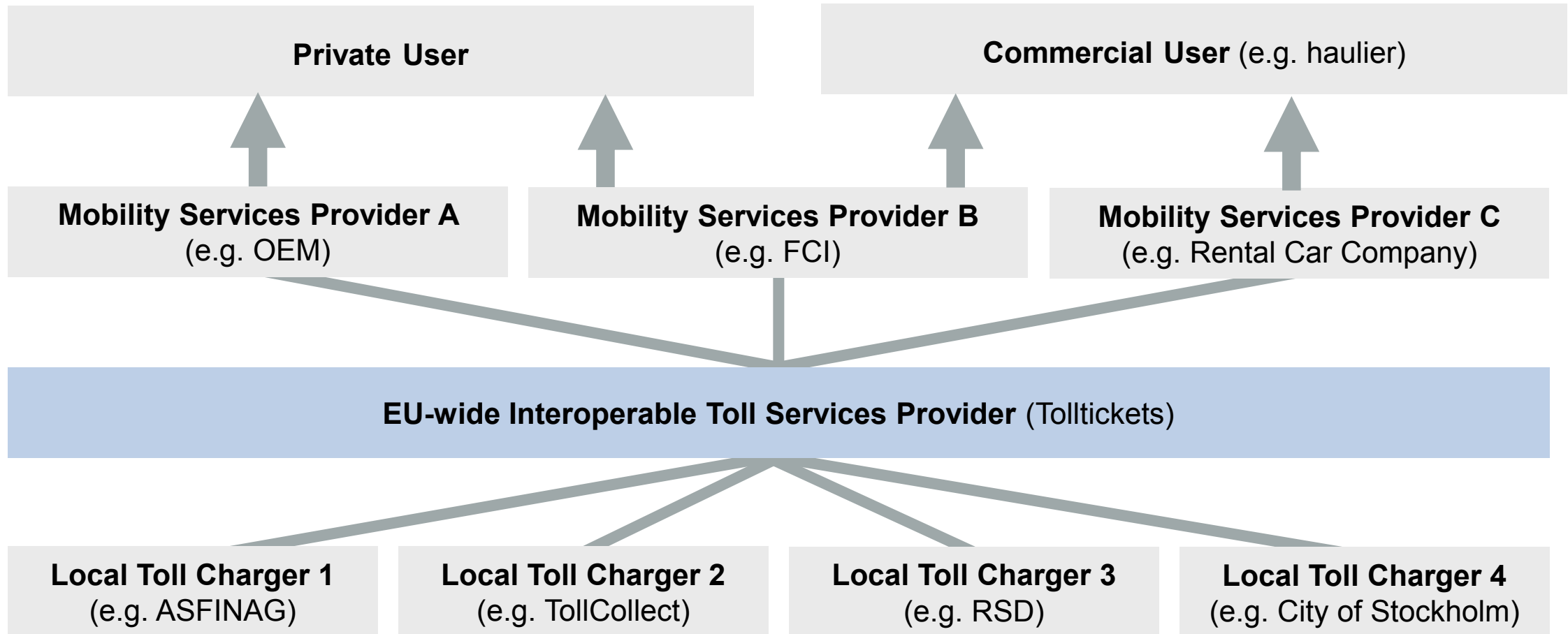


European Electronic Tolling Services (EETS) gives roaming for tolling to European roads:

One single OBU and a single contract (invoice)!

European Electronic Tolling Services.

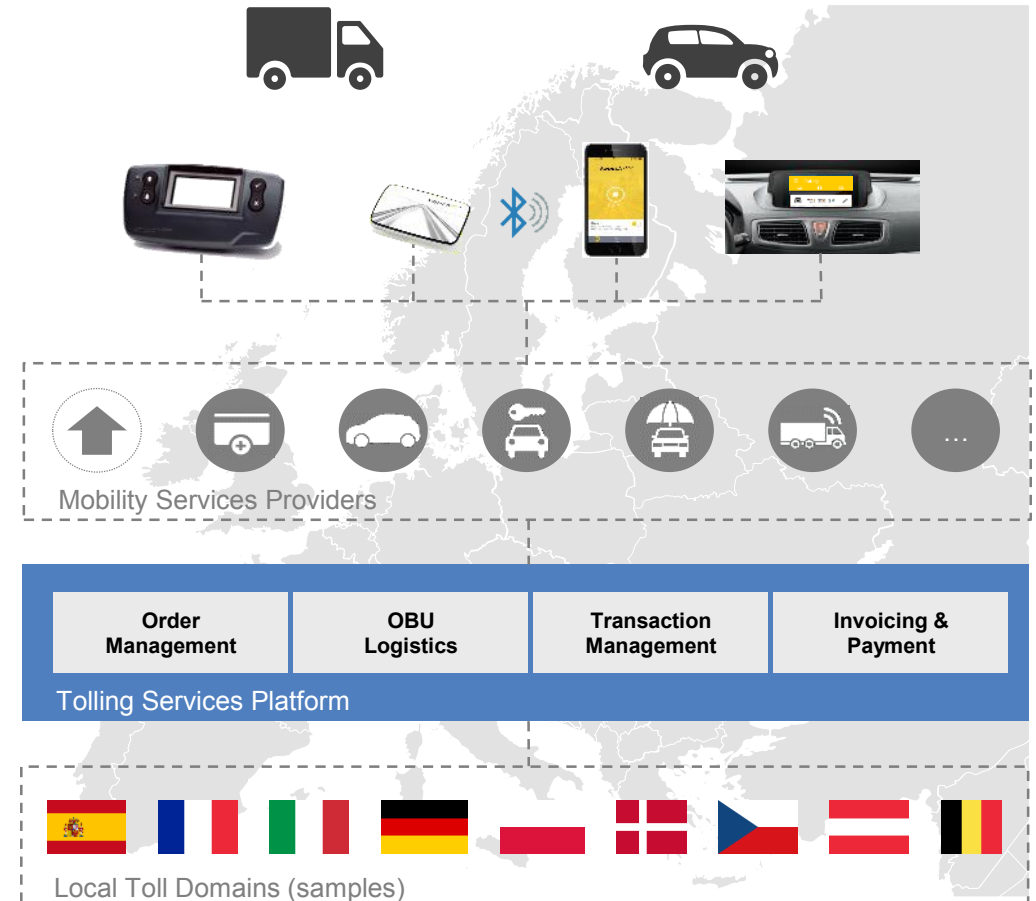
Stakeholders & value chain.



tolltickets tolling services.

Pay toll across Europe based on a single interoperable tolling device and a single services contract.

- > White-labeled and “tolltickets” branded service offerings.
- > Service options for light and heavy goods vehicles.
- > Various technology options (DSRC tags, hybrid GNSS/DSRC tags, bluetooth tag, vehicle integration).
- > Interoperable and broad coverage (stepwise EU-wide rollout).
- > Full E2E services operations (info services, order management, OBU logistics, transaction management, invoicing & payment, customer care, reporting).



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Fluidtime.

Pioneer in MaaS.

Facts & Figures:

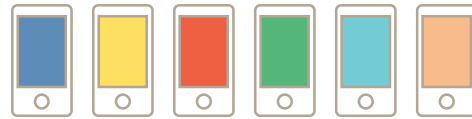
- > Headquarter: Vienna, Austria
- > Founded in 2004
- > 25 employees

Portfolio:

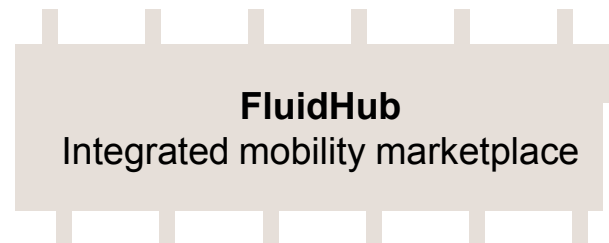
- > Integrated mobility services platform
 - FluidHub: integration layer
 - FluidBiz: CRM system
 - FluidGo: mobility app

References:

- > Qando: 43+ million requests / month; 500.000+ unique users p.m.
- > SMILE: MaaS lighthouse project
- > UbiGo: MaaS operator (Sweden)



Package and provide mobility services



Integrate and manage mobility offerings



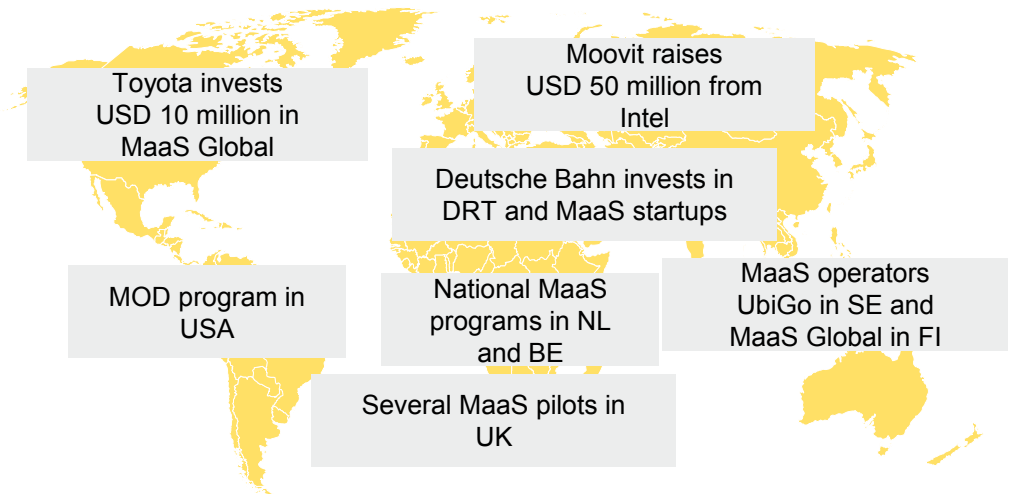
Urban mobility is changing drastically.

Urbanization, new technologies and the sharing economy pave the way from car ownership to “Mobility-as-a-Service”.



MaaS will become a cornerstone of future mobility:

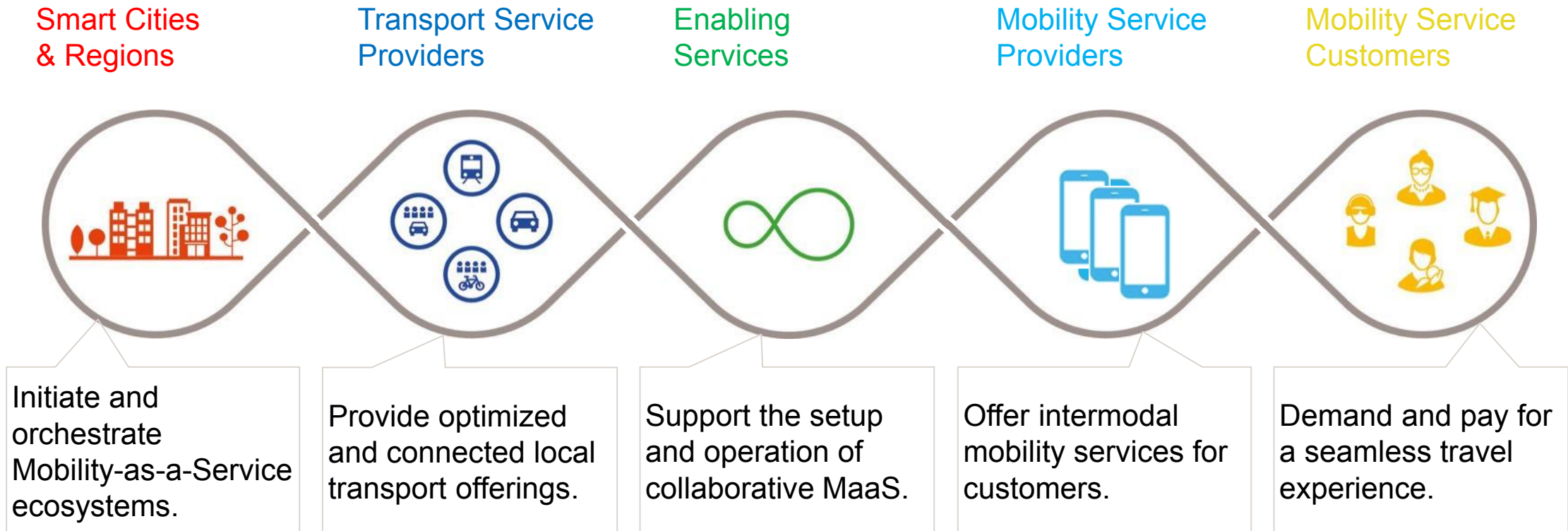
- > OEMs are investing heavily in creating a broad portfolio of new mobility services.
- > Ride-hailing companies like Uber strive to become a one-stop-shop for all kinds of mobility needs
- > PTOs extend to 1st/last mile services and set up own companies or acquire existing players



Yet the market is in a very early stage dominated by pilot projects

MaaS Ecosystem.

Several stakeholders have to work hand in hand to achieve the common objective of improving mobility.



Fluidtime offering for MaaS operators.

An integrated mobility platform providing all functions to build up state of the art MaaS offerings.

Fluidtime ...

- > connects and standardizes (shared) transport offerings,
- > makes them book- and payable
- > from a personalized device.

Integration



A cloud service providing a standardized access point to all integrated Transport services.

Payment



A set of services to manage customers, their bills and payment

Personalization



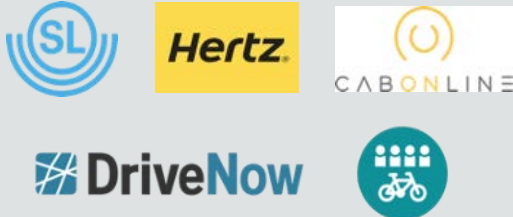




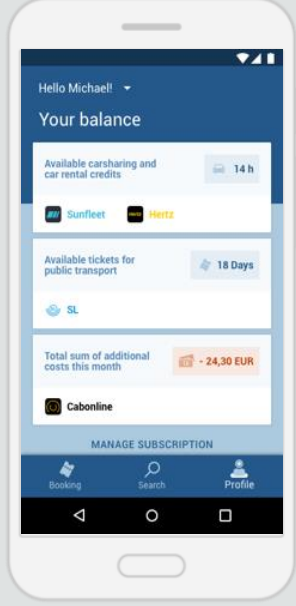
The white-label app as face to the customers.

Reference: UbiGo.

Stockholm, Sweden.

UbiGo

- > Pioneer in MaaS
- > Offers mobility packages for Stockholm (and later other cities)
- > Subscription as well as pay per use offerings
- > Mobility offerings: public transport, car rental, car sharing, taxi, ride sharing (planned)
- > Currently pilot operations
- > Fluidtime sole technology provider

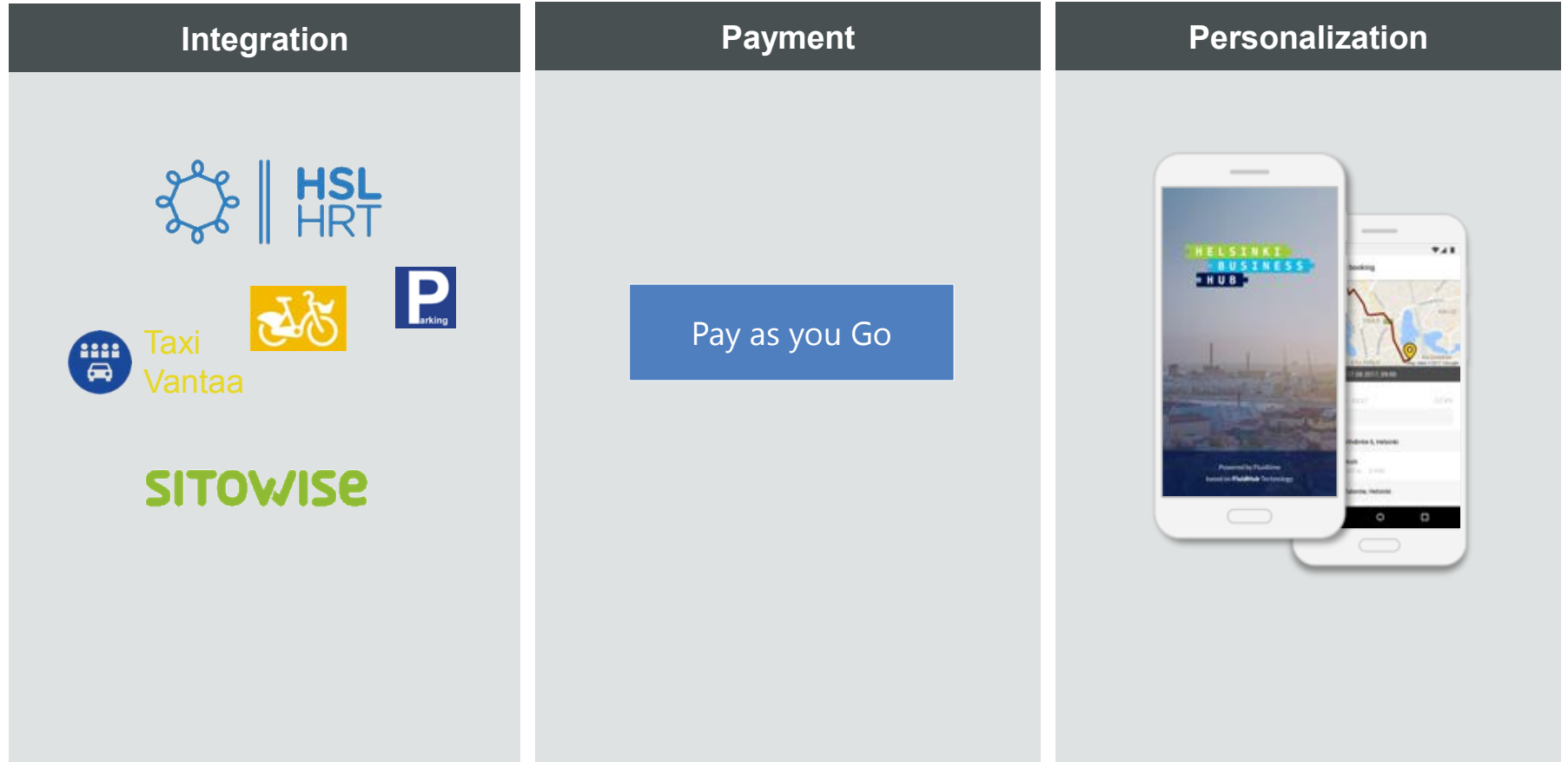
Integration	Payment	Personalization
 <p>Supporting Partner</p> 	<p>Subscription:</p>  <p>10 25 50 d PUBLIC TRANSPORT</p>  <p>25 50 100 h SHARED CAR HOURS</p> <p>MONTHLY BILL:</p>  <p>Consumption</p>	

Reference: Helsinki business hub.

Helsinki, Finland.

Helsinki Business Hub

- > Helsinki Business Hub is the regional development agency for the Helsinki Metropolitan area
- > Challenge:
 - Making city-funded public transport offers for specific customer groups gradually accessible for all people.
- > Partners:
 - SITO, Project leader
 - Vinka, Project partner
 - HSL (Urban public transport)
- > Timeline
 - Pilot go live 02/2018



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