

MOBILITY AS A SERVICE

Mapping a route towards future success in the new automotive ecosystem

Fuelled by constant improvements in autonomous vehicle technologies, by 2030, mobility as a service will far outstrip the profitability potential of traditional car making.

MOBILITY AS A SERVICE = DIGITALLY-ENABLED CAR-SHARING AND RIDE-HAILING

ACCENTURE RESEARCH SHOWS THAT BY 2030:



PROFITS FROM CAR MAKING COULD DECREASE TO **~€122 Billion**



PROFITS FROM MOBILITY SERVICES COULD INCREASE TO **~€220 Billion**



A QUESTION OF SCALE

Original Equipment Manufacturers (OEMs) are likely to dominate the manufacturing of autonomous vehicles that will turn mobility as a service into a mass market. They have the **brands, distribution networks, and customer following** to build and sustain mobile services at scale: the key to success.

But **they will need to move fast** to beat new entrants already shaping rapidly rising customer expectations...

PARTNERSHIPS, PLATFORMS AND ECOSYSTEMS

OEMs need to **partner with other players** to complement their existing strengths and make the most of the platforms and ecosystems of the future.



NEW BUSINESS MODELS

Five new business model options could help OEMs deliver superior services that are profitable and integrated with their core business:



1: LUXURY VEHICLE MANUFACTURER

Catering to the small, yet persistent market of customers who still want to own a car. This pure-play model will likely require the capability to establish a premium or even luxury brand, and to manufacture, market and sell cars of the highest quality.



2: B2B ASSET PROVIDER

Building, selling and servicing a new generation of “built-for-service” autonomous vehicles and delivering them to fleet providers; much as aircraft manufacturers build passenger planes for airlines. OEMs that take this route will likely have to shed their brand marketing operations and ramp up their flexible production capabilities.



3: VEHICLE AND FLEET OPERATOR

OEMs would generate a circular economy effect that reduces waste and increases revenue potential by making, owning and operating all-inclusive vehicle fleets designed for an optimal lifecycle. More efficient vehicle use would reduce the costs of mobility services. And OEMs wouldn't even need to own the services themselves to increase the lifetime efficiency of the vehicle; just all that stands behind them, end-to-end.



4: CAR MOBILITY SERVICE PROVIDER

Essentially a scalable version of classic car-sharing, which, by generating more frequent customer interaction, provides valuable customer data insights. If OEMs were to monetize that data, leveraging strong partners to provide additional, location-based services, they could generate new car sales leads as well as improve the overall efficiency of vehicle use. A desirable option, but one that requires substantial brand investment to make it competitive.



5: FULL MOBILITY PROVIDER

By offering full mobility as a service, combining multiple modes of transportation, OEMs could act as mobility aggregators at the heart of an inter-modal ecosystem, with partners including public transportation providers fully integrated into their brand. They would significantly broaden the scope of data and how it's used, strengthening their grip on the user interface. The drawback: there would only be room for one or two dominant players in each market.