



## User overload

- Untransparent
- 14 payment systems
- Bank cards not usable
- >20 APPs to access all
- Limited roaming

## Complex actor web

- National/international
- CPO, EMSP, OEM
- Land/facility owners
- Parking facility owners
- User organizations

## Strategies

- Integrated EMSP/CPO
- To own or roam?
- RFID cards to ease use

## Possible futures

- OEM CPO showdown?
- Market consolidation?
- Tech giant entry?
- Platform services?
- National regulation
- EU regulation?
- User friendliness?
- Payment system?
- Changing needs?

