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UAM Business Model Development and Market Study

Urban Mobility Days, 1 Oct 2020

Özhan YILMAZ

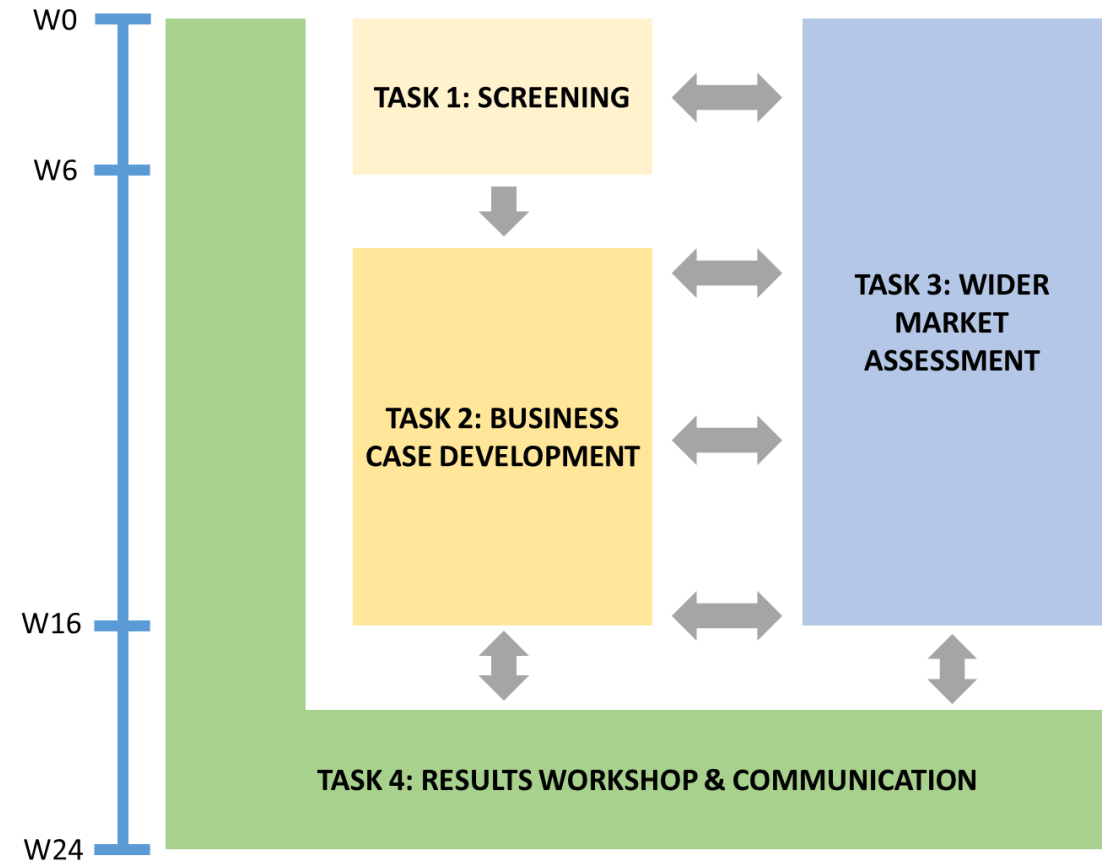
Assignment objectives

- ▶ Advisory Hub study supporting the goals of progressing in the field of urban air mobility
 - ▶ Start: 28 February 2020 (kick-off)
 - ▶ End: October 2020 → **February 2021**
- ▶ Study objectives:
 - ▶ Progression of UAM demonstrator projects – support business case development of select projects
 - ▶ UAM wider market assessment – assess European UAM and drone market, assessing market conditions for the whole spectrum of drone applications

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Progress

- ▶ An external consultant (ATKINS) working on the assignment
- ▶ Project Screening:
 - ▶ 12 UAM Initiative projects have been reached
 - ▶ Project promoters have answered an extensive questionnaire in 2 phases
 - ▶ Selection process is completed
- ▶ Wider Market Assessment:
 - ▶ Works on-going to assess UAM market for viable and scalable business cases that could potentially be replicated in other European cities and regions



Early findings

- ▶ Opportunities to expand the use of drone technology and enhance **social value**
- ▶ **Health** sector applications are on the frontline (coming with a greater deal of public acceptance)
- ▶ Projects are at **exploratory** phases – still some years before full service roll-out
- ▶ Challenges translating technologies into rolling out a workable logistics solution
- ▶ Needs efforts in quantifying key impacts and revenue models
- ▶ Strongest projects with clearly identified need for the scheme

Next stages

- ▶ Continue working on wider market assessment report
- ▶ Initiating business case development stage for the selected projects
- ▶ Communications to share and discuss the findings:
 - ▶ Results workshop (end 2020/early 2021)
 - ▶ Conclusive meeting (early 2021)



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