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June 24-25 2019, Novotel Amsterdam City, The Netherlands

Mobility Redefined: Blurred Lines in Public/Private Transportation

We asked the European mobility community for the questions they'd like to ask leading public sector organisations POLIS and EMTA. Their responses tackle crucial issues such as data sharing, OEM business models, infrastructure and investment.

POLIS
CITIES AND REGIONS FOR TRANSPORT INNOVATION

EMTA

Suzanne Hoadley
Senior Manager,
POLIS

Thomas Geier
Policy & Research Officer,
EMTA

Role of OEMs

Q1: What roles do you expect an Automotive OEM to play in this MAAS environment from Public Transport Authority Perspective?

(Mobility Specialist, **Nissan Automotive Europe***)*

A MaaS system is only as good as the systems are that it combines into its integrated offering. Part of this offering needs to be the access to transport assets, bikes, mopeds, cars, vans, minibuses... The provision and management of the vehicle fleets is the minimum role OEMs will play. Also, as we see with many car-sharing applications, OEMs are developing brand-rich customer facing products already which can be further advanced into MaaS applications themselves, meaning OEMs can have a role at both, the transport capacity production side as well as the customer facing service delivery side of the market.

OEMs are becoming mobility providers in their own right through car-sharing and ODT services. This may not be profitable today but it's about getting a foothold in the urban mobility market. Public procurement of public transport may well evolve away from line-based (transport supply) procurement towards demand-driven and customer service level procurement. I suspect that OEMs may then start to position themselves bidder for mobility services in cities.

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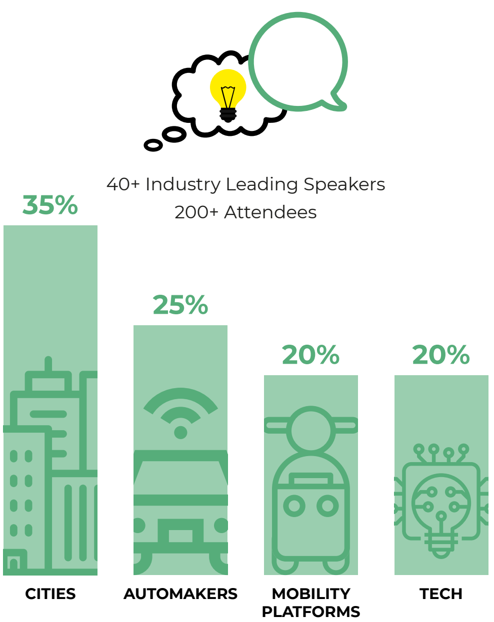
Thomas Geier, Research & Policy Officer, **EMTA**

WHO YOU WILL MEET



Car Sharing

Q2: There are assumptions we want to share the trip in the car with other people. Most people don’t want to share now, so why shall they want to do it in the future? This will have an big influence on the number of trips and cars and subsequently city congestion. What are your views on this?

(Senior Project Manager, Mobility, **City of Bremen***)*

There is indeed a lack of evidence on the actual willingness of users to share. Especially, as you rightly say, the sharing of trips, so being in the same vehicle with other people in a car-pooling system. I think in this question it always depends on what your actual (policy) goal is. Getting people out of private car, yes, then we would need to be willing to change from a private trip to shared trip. But by increasing public transport coverage (e.g. at night time or creating a finer mesh) then these services would target customers who are already shown a willingness to use consolidated transport modes. But again, we need evidence and more research here for sure - and not just stated preference but actual impact research.

Good point. Sharing a car could be as awkward as sharing a lift. This is where pricing and other incentives can be used. In my opinion it does not make sense to have such shared On-Demand Transport services in city centres where there is already a dense Public Transport network and little road space for more vehicles.

Q3: Still, I miss impact analysis on Mobility as a Service. Car ownership was mentioned - but what are the impacts?

(Senior Project Manager, Mobility, **City of Bremen***)*

Indeed, there is hardly evidence available. But also the question would be, *‘Is decreased car ownership the only goal of integrated mobility/MaaS?’*

I doubt whether MaaS by itself can effectively decrease car ownership but it could be a tool that facilitates mobility once measures that do effectively decrease car ownership are in place (e.g. parking fees, reduction of road space in cities, kilometre charging, etc.). If decrease of car ownership is the goal, these other measures are probably more effective than installing a MaaS like system.

Fully agreed. On one of my closing slides, I mentioned that we need more evidence about impacts on trip choice, km travelled, safety and equity. Most figures we have about the impact of TNCs are coming from the US.

> *"The key to the success of any new mobility service is value proposition and business model."*
>
> Suzanne Hoadley, Senior Manager, **POLIS**

Investment in MaaS

Q4: The challenge for MaaS as I see it locally in cities other than the major cities, is that this model only works where the investment levels of local public transport is key. I.e. MaaS won't work if the Public transport system is not there! How do you encourage investment in the public sector in traditional local transport (e.g. bus) when there has been continual un-investment?

(Brand Strategy & Mobility Services Manager, **Volkswagen***)*

I guess I would fully agree with your statement; a high quality, high frequency public transport system is necessary to provide a somewhat basis capacity of the system along the main trip corridors that can accommodate a large amount of the mobility demand in the city or region. Your question definitely is a difficult one. In the end this is nothing less than a clash of paradigms: In cities where public transport works well, it is considered as a necessary infrastructure to enable any other aspect of city life for everybody, a quite social approach to city life I would say. In areas where public transport does not work for citizens and investments are neglected, it is often approached with a purely commercial argument.

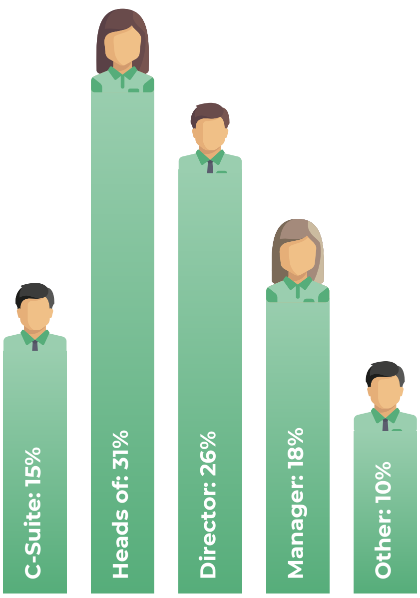
Completely agree. Public transport has to be the backbone of an integrated transport system and a MaaS app. There is a public transport revival on the continent due to sustained investment in PT and other measures to make PT a more attractive option. The situation in UK cities outside London is different, possibly due to the deregulated nature of PT and the lack of investment. The result is declining bus patronage, which is then substituted by a growth TNC trips, similar to what we see in the US. This in turn leads to more congestion and vehicle km travelled, as I showed in my presentation.

Q5: What is it in it for transport operators when it comes to joining MaaS platforms? Is there a win-win scenario possible or are we talking about a scenario with the operators at the bottom of the value chain?

(Policy Advisor, **Royal Dutch Transport Association***)*

The core business of transport operators (I presume you mean operators in public transport) is the production of transport capacity. While it is the choice of each operator to engage in marketing action, customer service and loyalty programs etc, there might be a benefit for these operators to focus on this core business of transport production and relevant information provision with high quality and frequency etc, while letting other organizations, who excel in customer contact, take care

SENIOR LEADERS IN ATTENDANCE:



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of the customer. Operators who per se want to stay engaged in customer contact should simply become a provider of MaaS services to clients as well.

IMO, public transport operators have to be at the table or they'll be on the menu.

On-Demand Transport

Q6: Showing an almost empty Public Transport bus (in reference to a ViaVan slide)... I could present also pictures of almost empty MOIA buses... When does it become a business case?

(Senior Project Manager, Mobility, **City of Bremen***)*

Completely agree. It's unfair to show pictures of empty buses to justify a new service. I also made the same point at an event a month ago (at which Via was present and asked the question about average occupancy. Regarding the business model, I suspect that it will become a mix of commercial service in dense areas where there is potentially high demand (and therefore competition with conventional PT) and publicly-subsidised services in lower demand areas, such as suburbs and rural areas.

Q7: What are the lessons learnt from Chariot (on-demand bus) going out of business?

(Policy Advisor, **Royal Dutch Transport Association***)*

Excellent question. IMO, the key to the success of any new mobility service is value proposition and business model.

Q8: MaaS providers are increasingly present in the urban areas, but what about rural areas where flexible, on-demand mobility services could provide an answer to empty and costly regular buses?

(Policy Advisor, **Royal Dutch Transport Association***)*

In our understanding, MaaS describes simply the integration of services that are present. Unfortunately the rhetoric of some providers of such services appear to intentionally keep up the idea that MaaS in itself produces transport capacity and may thus be useful for rural areas as well. What rural areas need, as you rightly say, is the flexible and on-demand service modals first, before these can be integrated into a Maas-like service. Unfortunately, such flexible mobility concepts only appear in central cities where the mobility offer is mostly exceptionally good already. There might be need to rethink rural transport (and the possibilities for subsidies) altogether

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IMO, ODT service providers will only go to rural areas if there is public subsidy.

Data

Q9: Are there currently already plans or talks to build a national or international data platform for MaaS-related data?

(Consultant, **BMW***)*

There is a lot of work going regionally. EMTA has just launched a collaboration effort to further investigate the role metropolitan transport authorities could/should play in these developments. From my understanding currently only the Swiss federation and Austria are working on national initiatives. However, I don't know how far these initiatives have developed. In the Netherlands, the Ministry of Transport is looking into possibilities for standardization to enable a series of MaaS pilots throughout the country.

Q10: Do you think the mobility providers will offer their data to cities?

(Consultant, **BMW***)*

I don't think they will. I think the better approach is to make them provide data to cities by linking the provision of certain data sets to the access to public space and service licences. Cities do not need all kinds of data, so first a debate might be necessary around the kind of data that is necessary and useful for cities for them to work more effectively.

"Cities do not need all kinds of data, so first a debate might be necessary around the kind of data that is necessary and useful for cities for them to work more effectively"

Thomas Geier, Research & Policy Officer, **EMTA**

Q11: (Question for Thomas) Have you looked into which technology components need to be centralized within this Data integration layer? Ex: Data, ticketing system, itineraries, etc. Thank you!

(European Market Manager, **Kisio***)*

We have unfortunately not looked into that with such detail yet and I think this is also not something transport authorities should do by themselves. In Amsterdam, we have now started a process to engage with both the cities, the transport operator and transport services providers, and potential MaaS organizations to find out what technical aspects really need to be covered by this public digital infrastructure. I personally think the ones you mention will for sure need to be generally accessible, yet the discussion for example needs to show whether, for example, the technology to remotely open car and bike sharing vehicles is something that needs to be centrally integrated as well. In this debate I'd say that the technological solution is probably the easiest part. Reaching commercial agreements appears way more difficult than building the technology.

Q12: How to get transport service providers of all types to provide open book and pay APIs that essentially all for others to become resellers. The new Finnish transport code legislation enshrines this so how have this wherever MaaS is needed?

(CEO, **SkedGo***)*

From our discussion within the EMTA network, it appears that the creation of open APIs is not enough yet to establish a healthy and societally sustainable ecosystem for MaaS. Simply providing open APIs would still make MaaS provision dependent on immense data and contractual skills, leading to still high entry barriers for that market and resulting in potential monopolistic scenarios as network effects may very well apply in the market for MaaS. A public data infrastructure that reduces these entry barriers on both sides of the market (transport production side and service provision to clients) may reduce these market entry barriers enable healthier competition while ensuring that authorities remain in a position to regulate and govern the ecosystem, should it turn out to harm, rather than contribute to, the cities mobility policy goals.

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City & Public Transport Leaders Already Confirmed to Attend IMPACT>MOBILITY

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What to expect:

40+ world leading Speakers: Cities, OEMs, Pubic Transport Authorities, Mobility Service Platforms & Investors

2 Days filled with cutting-edge keynotes, case-studies and debates: Conquer key challenges, private and public partnerships, financial models, deal-flow and new and immediate opportunities

200+ mobility leaders: A whole host of senior mobility decision-makers attending from Europe's biggest cities, transport authorities, OEMs, and mobility service platforms

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New Mobility Evangelist of Smart Mobility Unit | Digitalization
Volkswagen AG

Chris Snyder
CEO
ViaVan

Maita Fernandez-Armesto Sanchez
Project Coordinator, Mobility & Infrastructure
City of Barcelona

Iain Macbeth
Head of Foresight
Transport for London

JONNA PÖLLÄNEN
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MaaS Global

Kinga Wilewska
EMEA Strategy and Operations
Bird

Hamid Zarghampour
Chief Strategist, Connected and Automated Transports
Swedish Transport Administration

Nicola Dallatana
Head of New E-Mobility Division
Toyota Tsusho

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