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AUTONOMY

& THE URBAN MOBILITY SUMMIT

PRAGUE

CITY DATA CONGRESS 2019

MaaS & Open Data : How Will Cities and Operators Move Forward?

CHALLENGES CITIES FACE

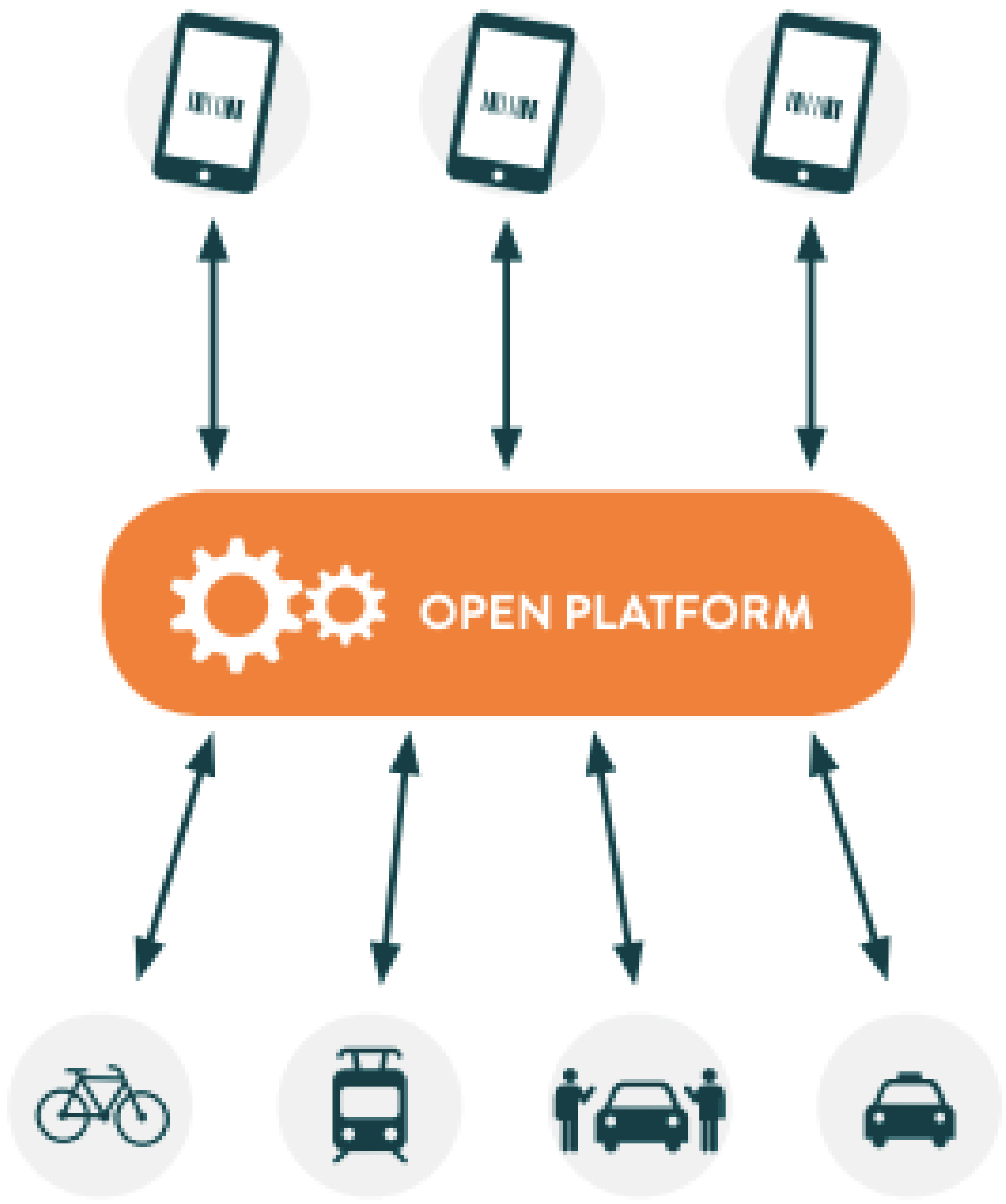
reduce pollution

reduce congestion

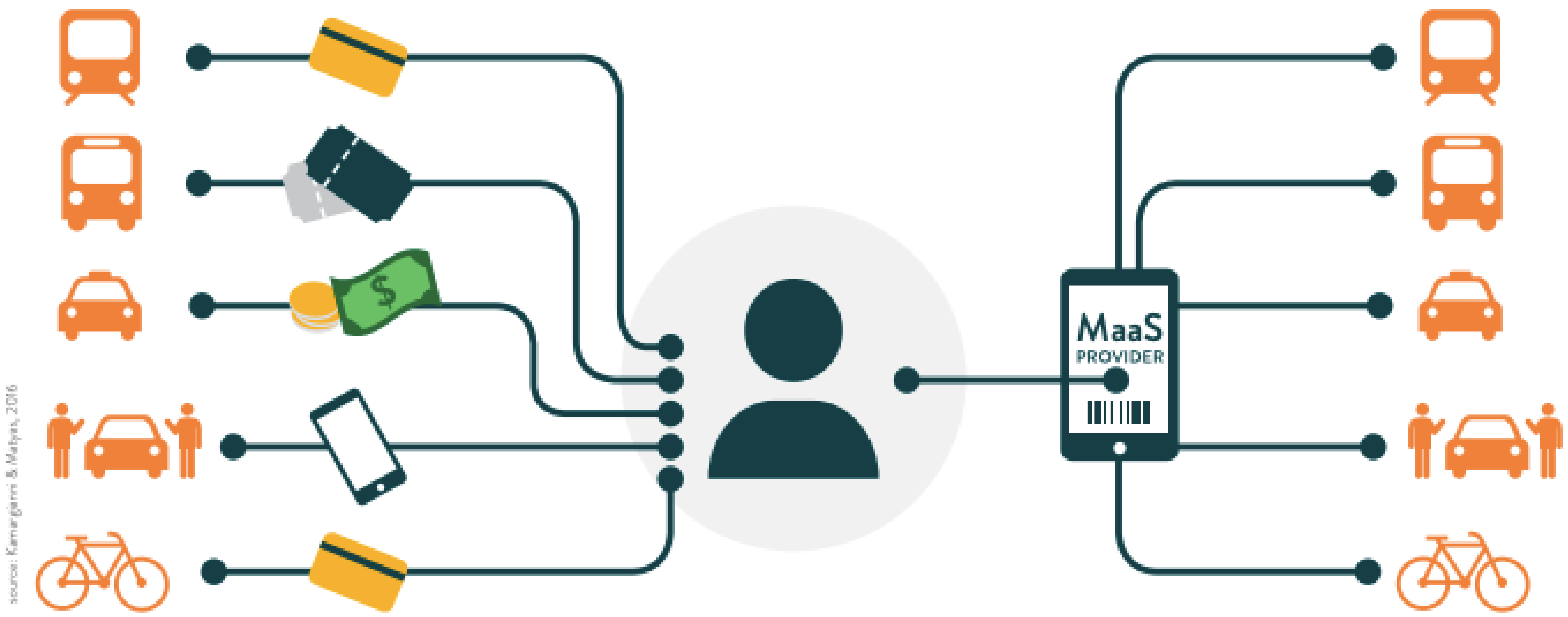
reduce CO2 emissions

- Billions invested in solutions: EV companies, charging infrastructure, mobility startups, last mile solutions & public transport infrastructure.
- The results aren’t in line with investment. Cities are still polluted, congested and 2018 was a record year for CO2 emissions.
- In many cities, the <u>motorcar is still the preferred door to door solution</u>.

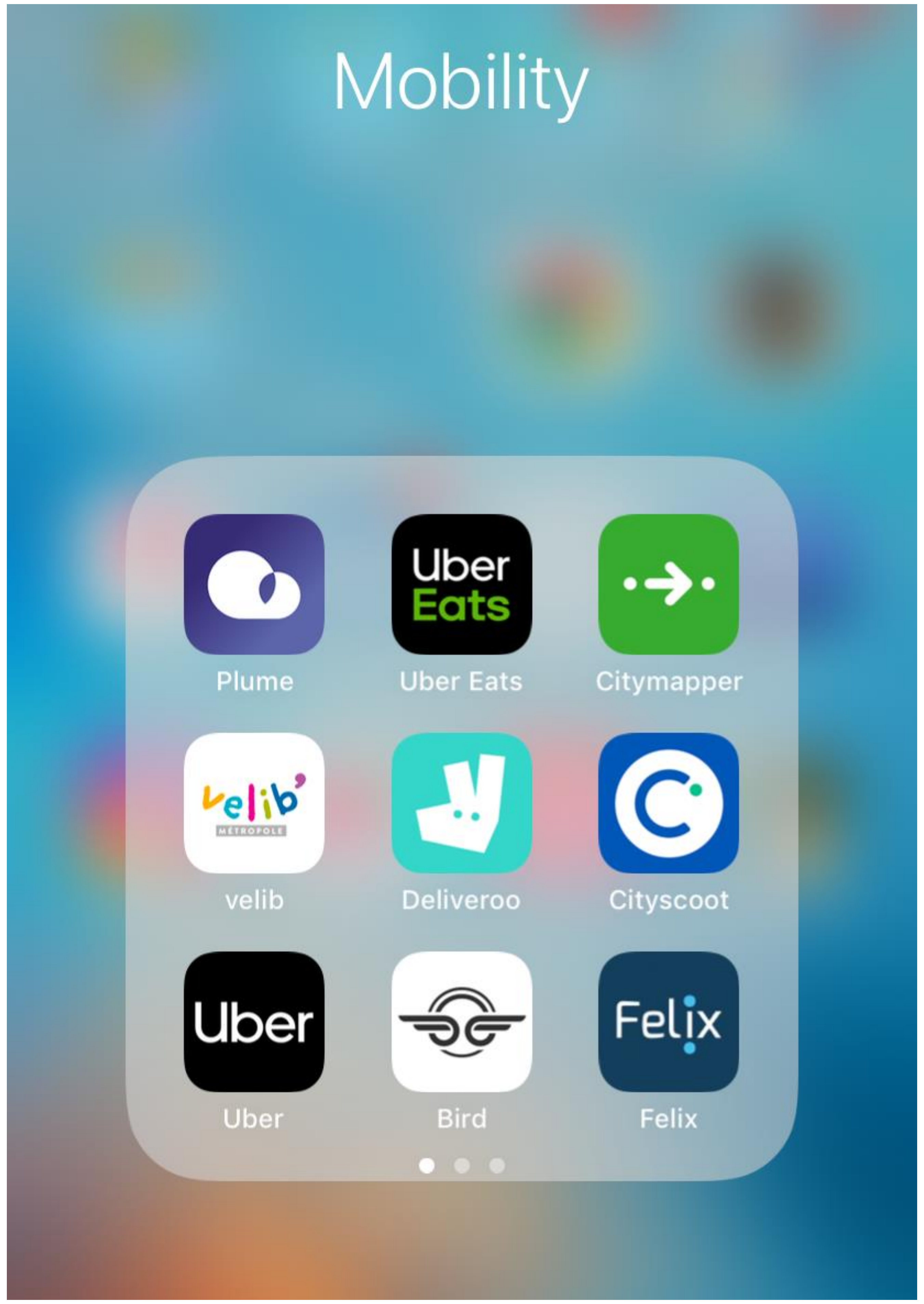
MaaS can reduce car ownership, but what is MaaS?

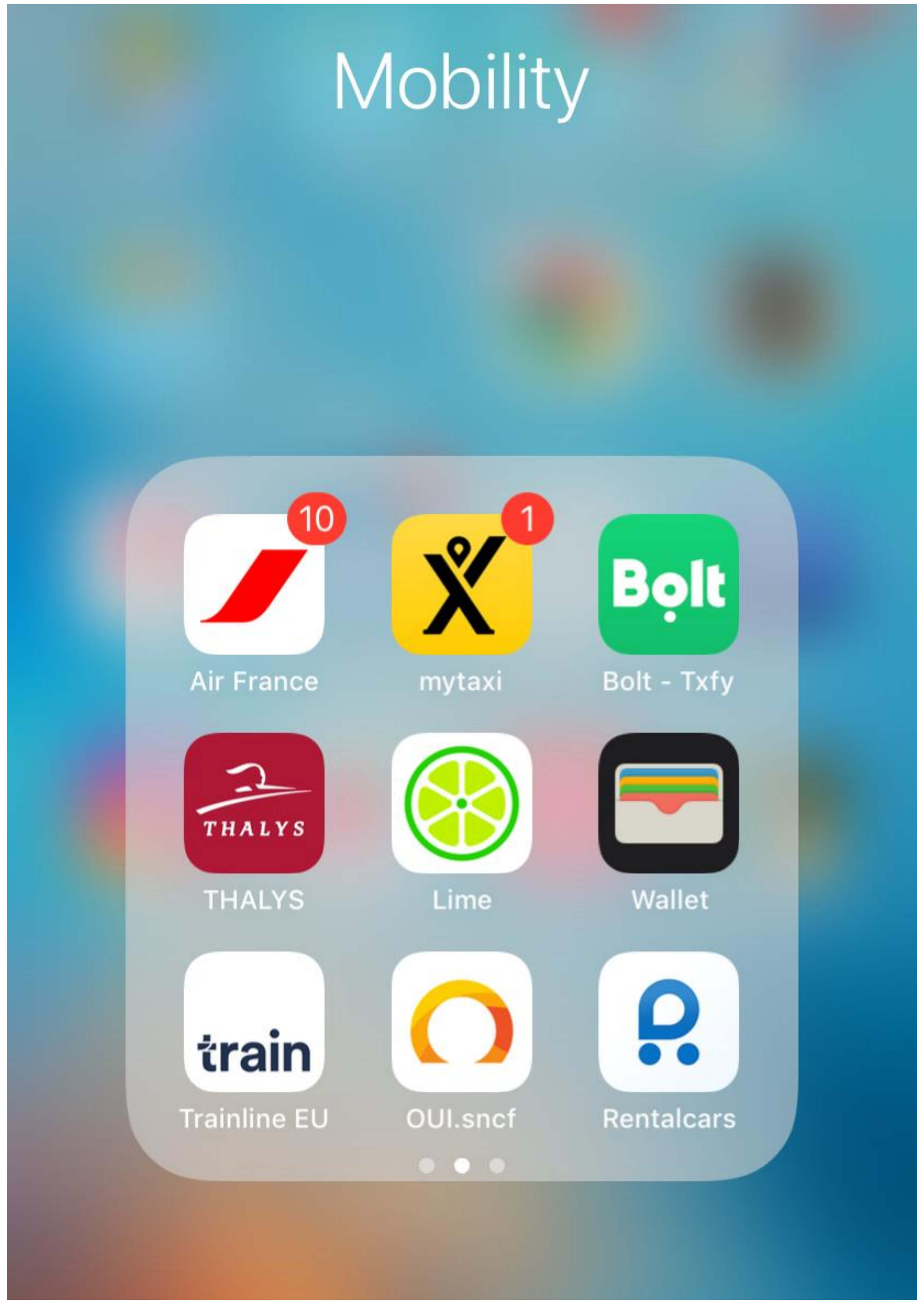


This is the current situation:



Multimodality in Paris:





How will MaaS *evolve*?

Every provider has their own ecosystem

What are the potential outcomes?

Winner takes it all:

Private operators will be MaaS providers

Open ecosystem:

Neutral operators create white-label apps

Cities take control:

Public operators create their own platforms

Leading private MaaS operators

Grab

Taxi	Bikes	JustGrab
Car	Coach	Grab Rentals
Hitch	GrabPet	Food
Share	Shuttle	Express Beta
Scooters	Shuttle Plus	Trip Planner

Citymapper

- Public Transport
- Car sharing
- Taxi
- Bikes
- Scooters
- Vespa

Bolt

- Taxi
- Ride Sharing
- Scooters
- Food delivery

Uber

- Taxi
- Ride Sharing
- Bike Sharing
- Food delivery

Mobility as a ***private*** service

Potential outcomes :

- One private operator will dominate mobility in a city with multiple offerings
- They value the size of the user base as the asset in which to invest
- The hope is to fulfill all mobility needs with their vehicle-centric offering

Challenges:

- Private operators can’t get other private operators or PTOs on their platform because data is valuable
- Will promote most profitable vehicle instead of the most appropriate
- Competing companies over deploy vehicles to win market share

Neutral operators: will they take the lead?

whim

Public Transport

City bikes

Taxi

Rental car

Car share

€62/30 days; €499/month; Pay as you go

migo

Ride share

Taxi

Car share

Bike share

Transit

SKEDGO

Public Transport

On-demand transport

Shared transport

Parking

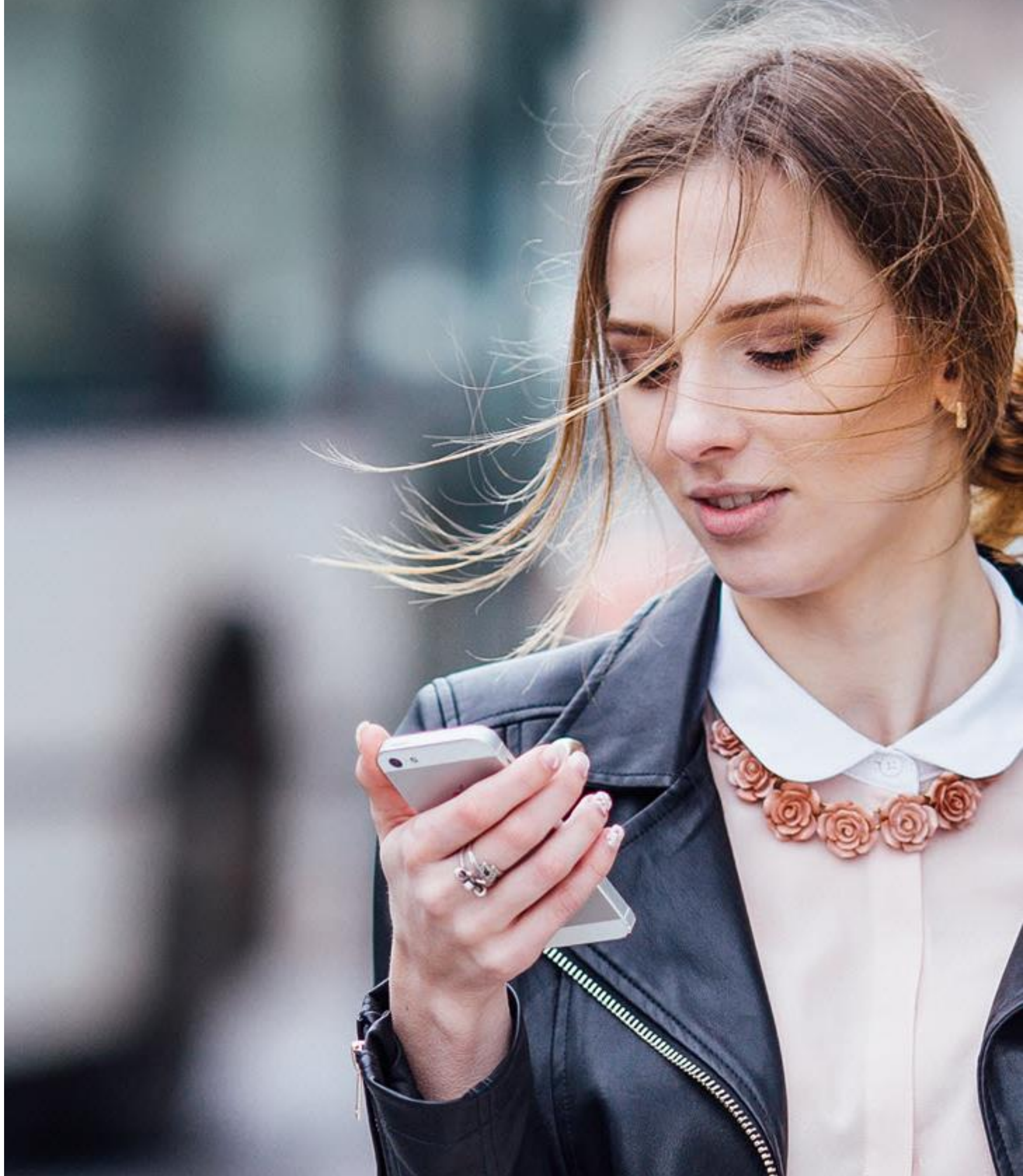
Mobility as a ***neutral*** service

Potential outcome :

- The neutral service would aggregate private and public transport operators on the same platform

Challenges:

- Independent platform could work but efforts to date haven't convinced *both* public and private operators to use this platform.
- Whoever has visuals on a city's mobility data has the power.



Public operators: ***what about cities?***

Kisio

- Metro
- Tram
- Train
- Bus and coach
- Parking
- Bicycles
- Reduced mobility transport
- Autonomous shuttles
- River and sea shuttles
- Self-service vehicles and car-sharing schemes

door2door (Making Cities Smarter)

- Public transit
- Ride pooling

Alstom Mastria

- Public transit
- Shared mobility
- On demand services
- Electric vehicles

moovit

- Public Transit
- Hailing services
- Taxi
- Dockless systems
- Cycling
- On-demand transport

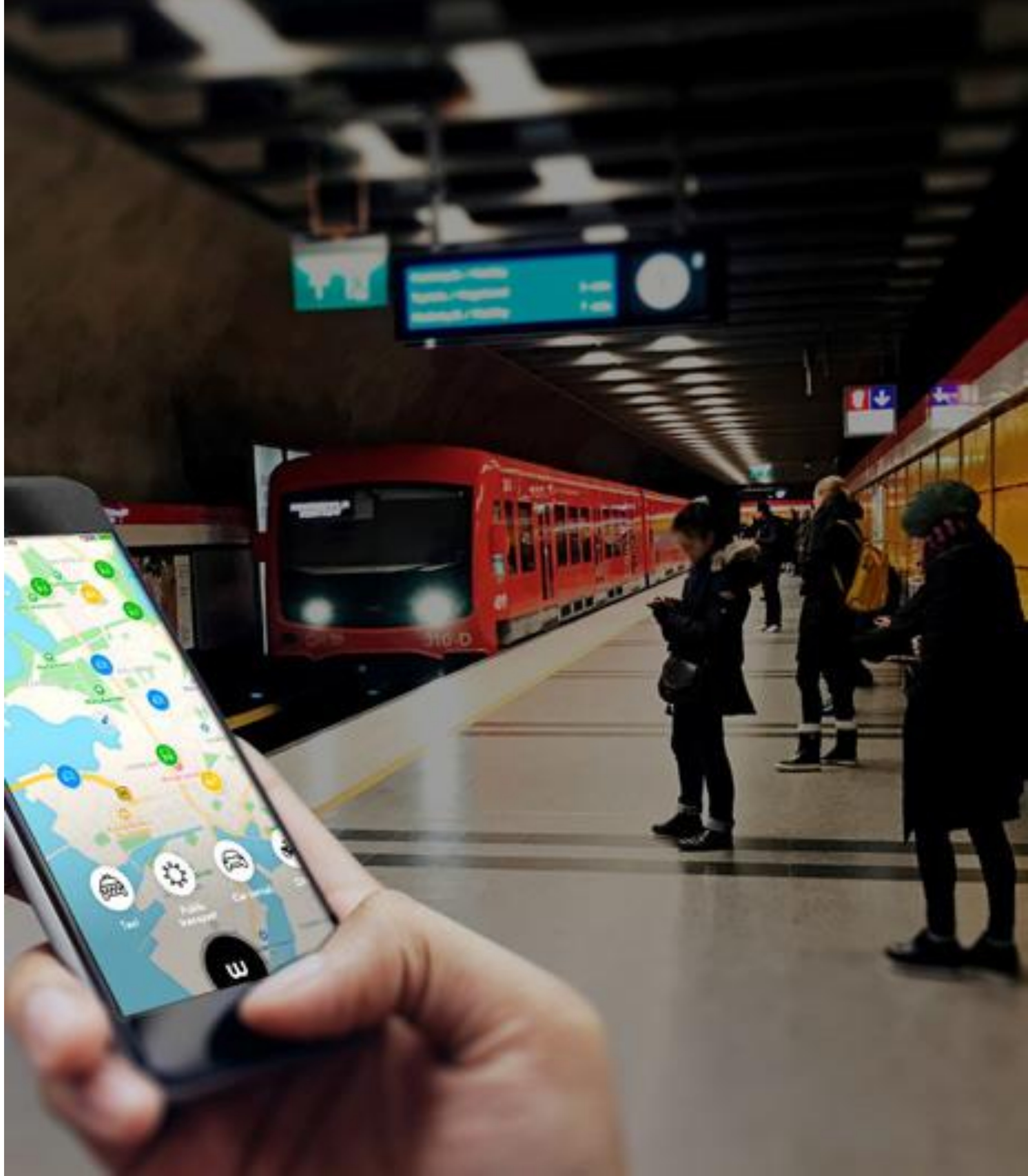
Mobility as a ***public*** service

Potential outcomes :

- Public transport operators use white label software platform to aggregate public and private operators onto a single platform
- PTO controls platform and invites private operators to fulfill certain services (e.g. scooter rentals)

Challenges:

- Public operators don’t have the human resources to manage data offices
- There’s a huge, diverse amount of information to understand opportunities in cities
- Data security is a challenge



Why go public?

- Sole power to insist on a single platform in exchange for the license to operate
- Can appoint private operator solutions as per demand for a specific service as opposed to “letting the market decide”
- Use data to make decisions to reduce pollution and congestion
- Nudge commuters in the right mobility direction (shared shuttles over car)
- Charge private operators a commission and get revenue from private operators
- Keep voters happy, democracy at work

ALL OF THIS ACTIVITY ON ONE DASHBOARD

CONCLUSION

Private operators can’t get others to share data, and profitable solutions cause waste

Neutral platforms are having trouble convincing cities to work with them

Public transport authorities need to take ownership of MaaS platforms

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