

The MaaS and UbiGo story,
(från "Mobiitet til lunjs" 3 maj 2022)

**"Er det flere konsulenter
som jobber med MaaS
enn kunder som bruker
det?"**

Hans Arby,
forskare RISE och grundare UbiGo



Bara 4 utmaningar...

- Återförsäljning av kollektivtrafik
- Rekrytera och integrera mobilitetstjänsteleverantörer
- Rekrytera kunder
- Tjäna pengar

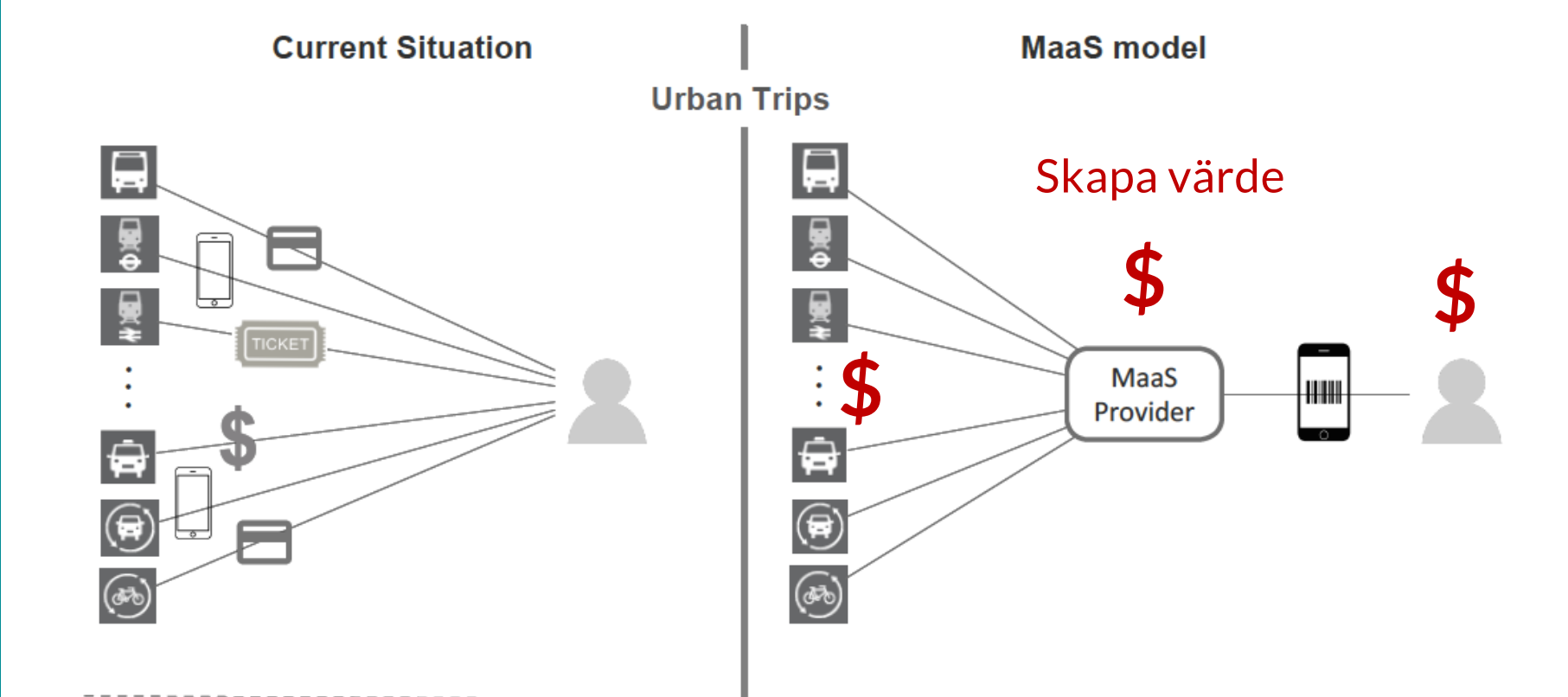
Gothenburg pilot (6 må)

2013-2014

Stockholm operation (2 år)

2019-2021

En mycket enkel bild av MaaS (Mobility-as-a-Service MaaS)



Kamargianni

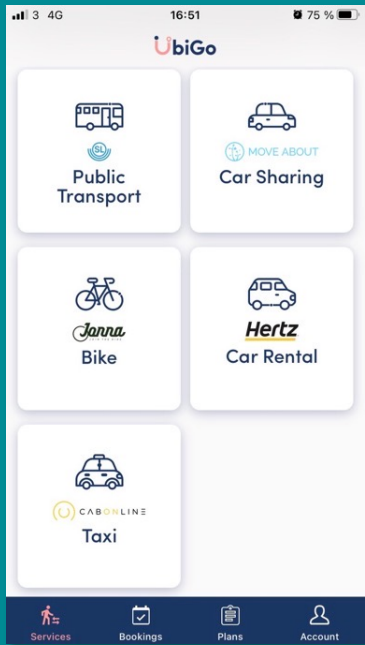
A photograph of a city street scene, likely in San Francisco, showing a bus, a cyclist, and a pedestrian. The bus is white with the number 614 and the route 'THIRD STREET Castro + Market' visible. A person is riding a bicycle in the foreground, and a pedestrian is walking on the sidewalk. The background features tall buildings and trees with yellowing leaves, suggesting an urban environment.

MaaS handlar om att...

...göra det lätt att kunna använda "rätt" färdmedel för varje resa

...transformera mobilitets-ekosystemet och bygga multimodala samarbeten

...utmana bilägandet



1

Gothenburg pilot

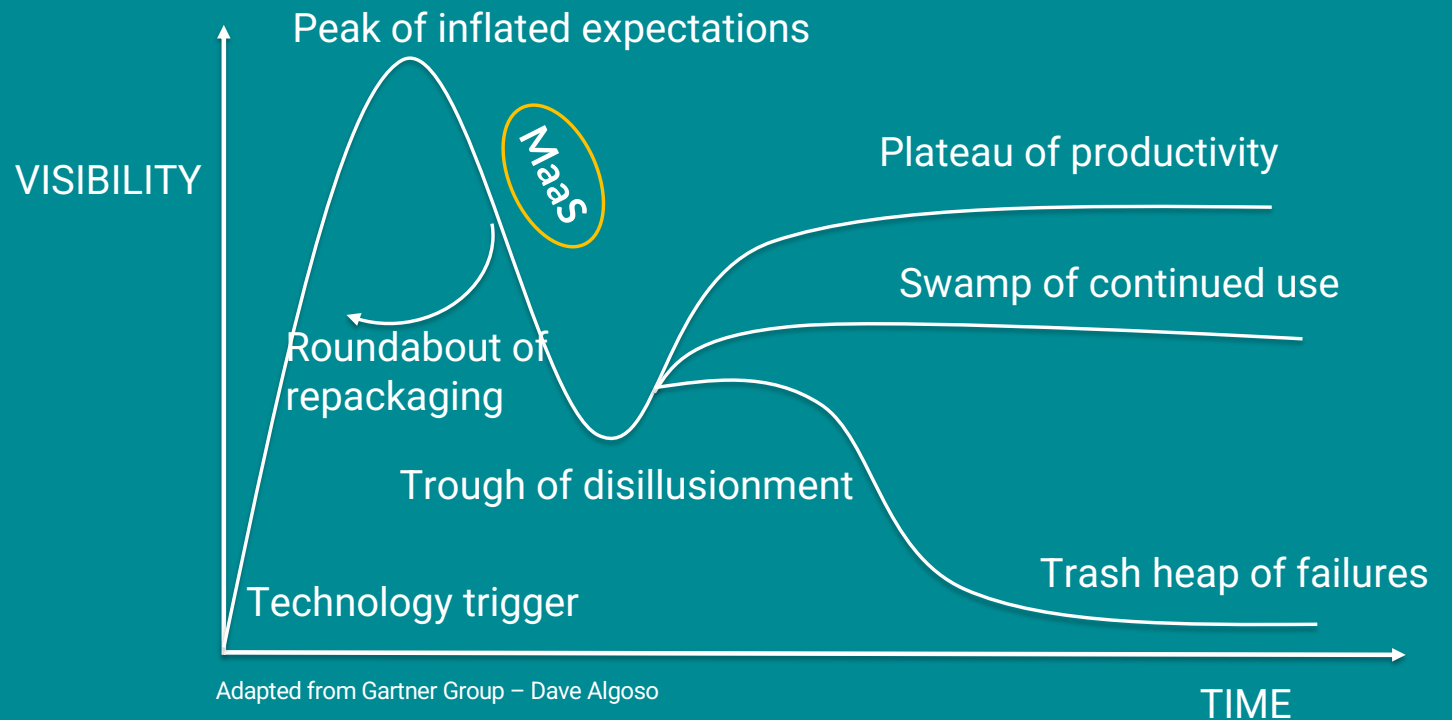
2013-2014

Stockholm operation

2019-2021

2

(Om vi hinner)



2011

Vi hadde en idé....

Er det mulig å gjøre en tjeneste som kan konkurrere med den egne bilen?

Går det å tjene penger på å drive en slik tjeneste?



Om vi ska kunna ersätta privatbilen:

- **Alla** resor – morgon till kväll, måndag till söndag, januari till december, istället för A till B
- För **hela** hushållet
- **Bättre** än att äga bil

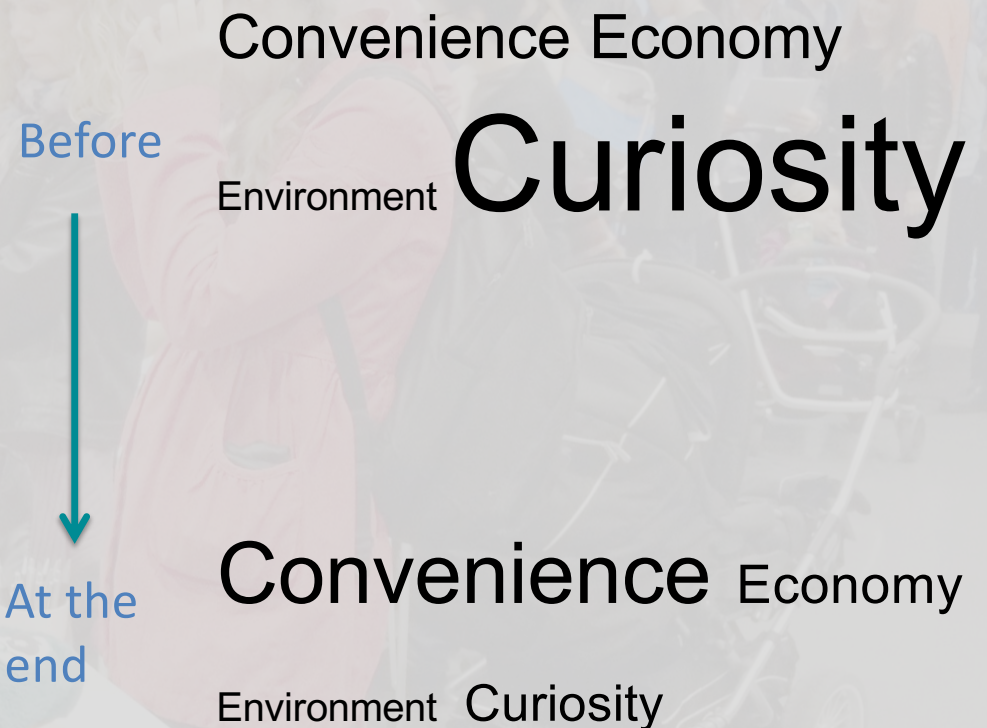
Men om vi lyckas ersätta bilen får vi...

- Goda kunder **och**
- God samhällsnytta

The Gothenburg pilot 2013-2014

- 70 households paying households
- 6 months
- Flexible subscription ($\approx 130\text{€}/\text{month}$)
- 20 cars in storage
- 0 drop outs
- $>12\ 000$ bookings/transactions

- **Mostly normal**
- **Curios and quite demanding**
= early adopters

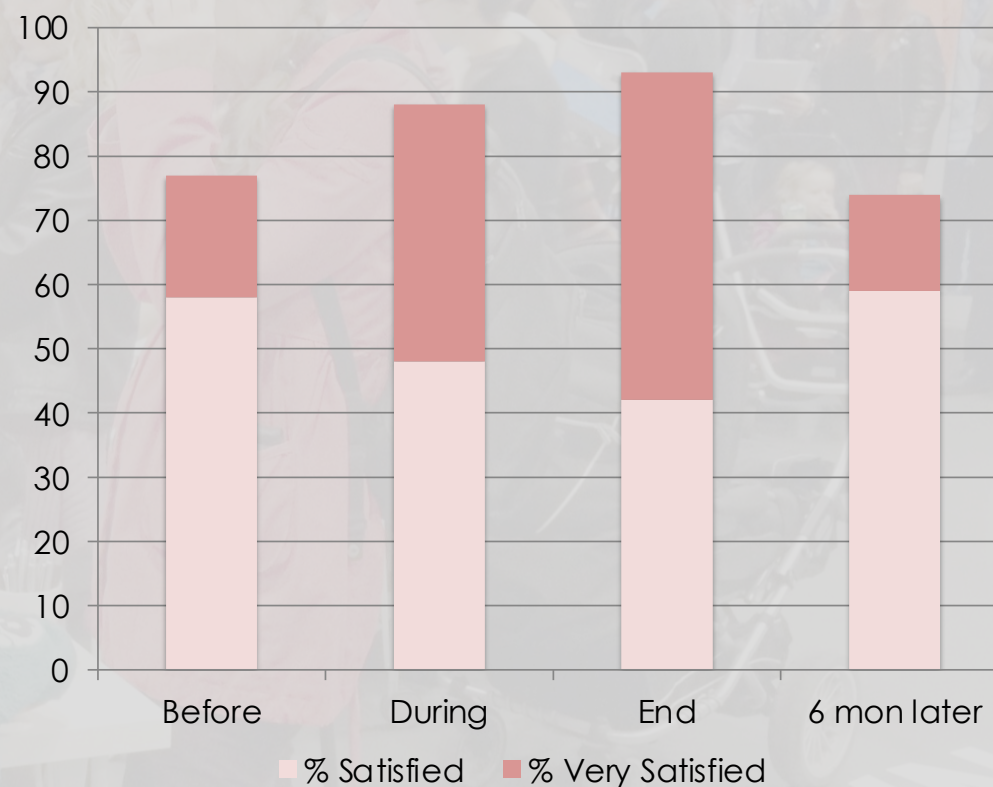


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Satisfaction with transport



Travel diaries (all users, all trips)

Mode	Before UbiGo	Change with UbiGo
(Walk/run	~25%	Decrease ~5%
Private car	~25%	Decrease ~50%
Tram	~15%	Increase ~ 5%
Local bus	~15%	Increase ~35%
Bicycle	~10%	Increase ~35%
Regional bus	~ 3%	Increase ~100%
Train	~2%	Increase ~ 20%
Car sharing	~2%	Increase ~200%

Travel Behavior (use/attitude, questionnaire)

Participants reduced use of (private) car and increased use of other modes.

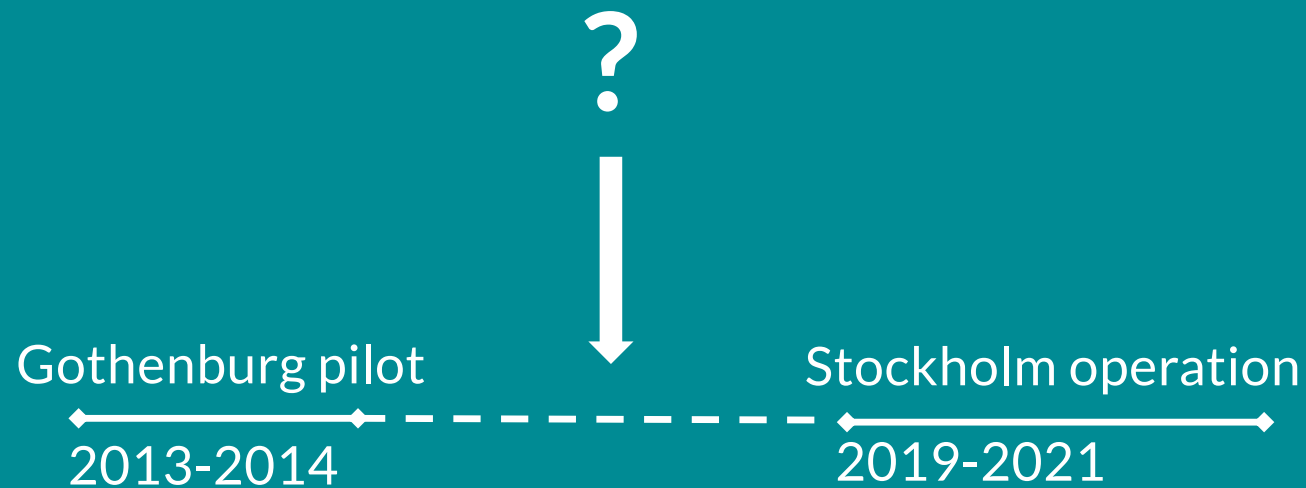
	<u>USE (less-equal-more)</u>	<u>ATTITUDE (worse-same-better)</u>
Bus/tram:	4% – 46% – 50%	2% – 46% – 52%
Local train:	7% – 75% – 18%	3% – 71% – 26%
Bikesharing:	16% – 61% – 23%	1% – 57% – 42%
Private bicycle:	19% – 65% – 16%	3% – 83% – 14%
Carsharing:	6% – 37% – 57%	3% – 36% – 61%
Car rental:	13% – 59% – 28%	4% – 75% – 21%
Private vehicle:	48% – 48% – 4%	23% – 74% – 3%
Taxi:	12% – 68% – 20%	6% – 76% – 18%
Walking:	6% – 73% – 21%	2% – 82% – 16%

Typiska pilot-problem

Kollektivtrafiken (Västtrafik)

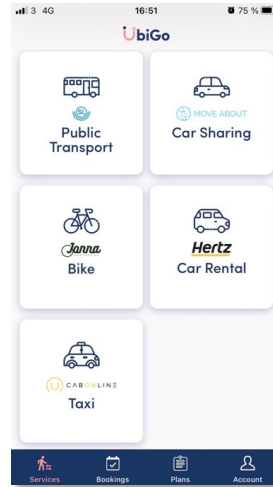
Typiska start-up-problem

Mobilitetsmarknaden i sig

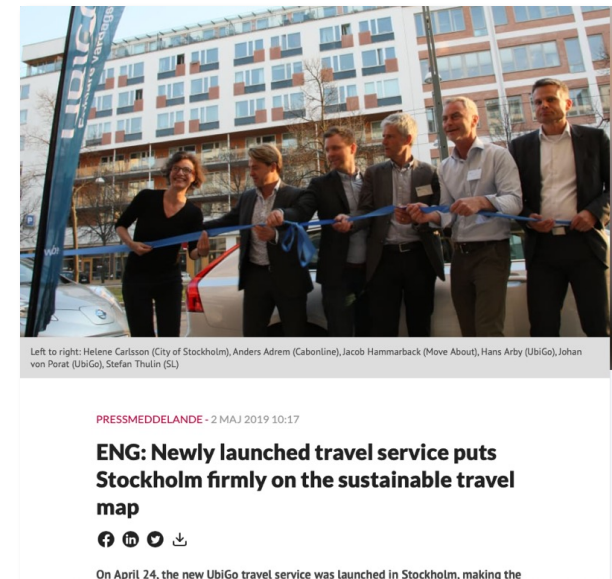
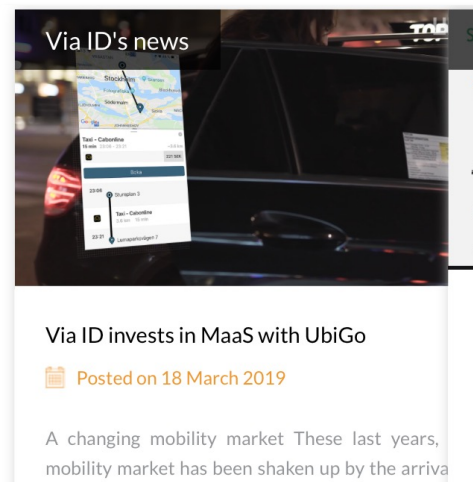


”Det är aldrig försent att ge upp”

- Launch Stockholm spring 2019:
- Reselling agreement with SL (PTA)
- Tech partnership with Fluidtime
- Investment by Via-ID
- First year target: 200 customers



viaID





SL public transportation

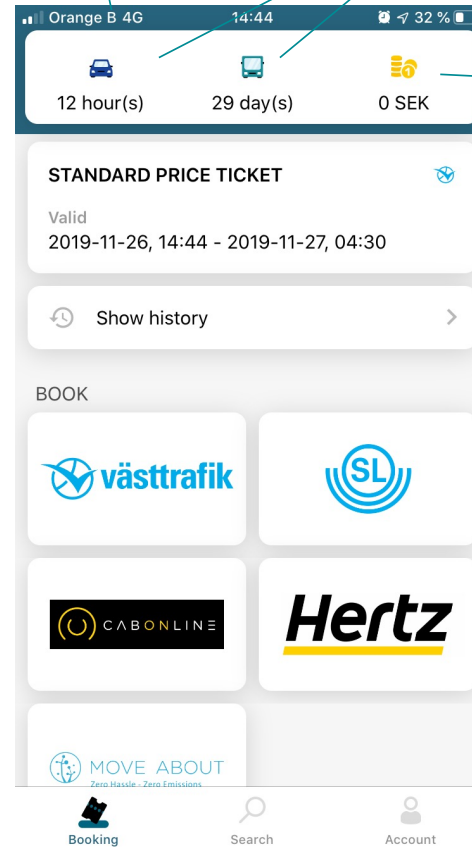
Starting at SEK **525** per month

Together with SL, we offer a flexible subscription of day tickets at a competitive price point compared to using the regular pay-as-you-go service of the

Balance of household account

Car and PT credits refilled every month

Taxi, top-ups etc part of next invoice



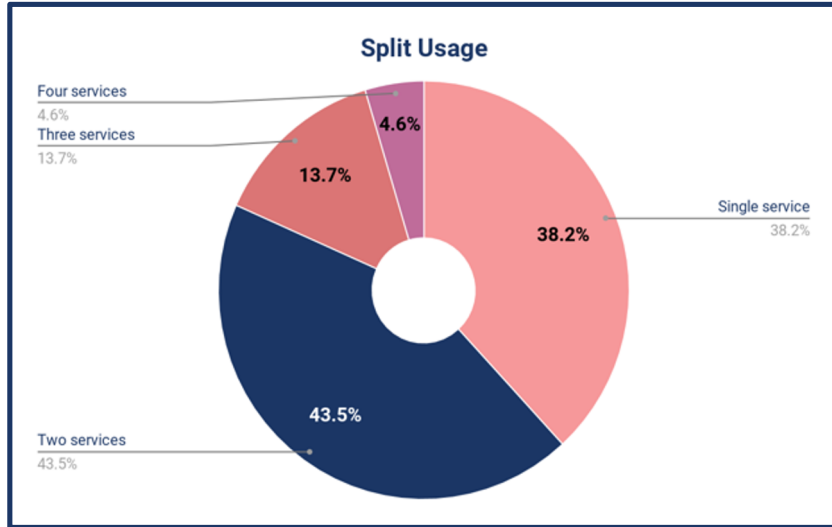
Exemple monthly refill, car:

6 hrs	60€	(10 €/hr)
12 hrs	102€	(8.50€/hr)
18 hrs	144€	(5,50€/hr)
24 hrs	180€	(13 €/hr)

Exemple monthly refill, PT:

10 days	53€	(5.30€/day)
20 days	85€	(4,25€/day)
30 days	122€	(4,05€/day)
40 days	154€	(3,85€/day)

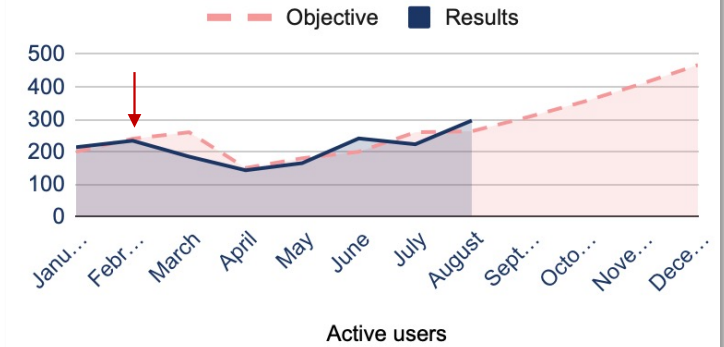
2020



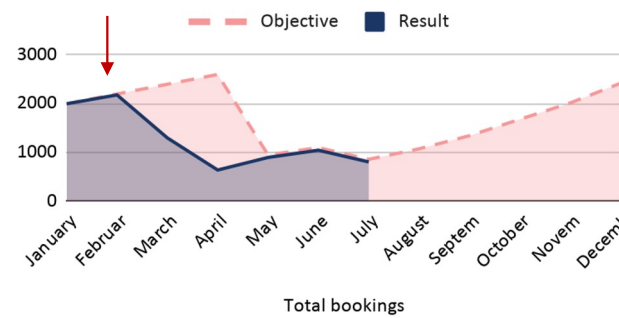
NPS
70

Churn
6%

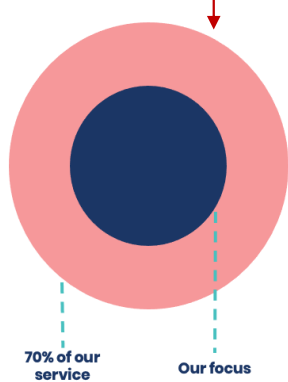
Active users



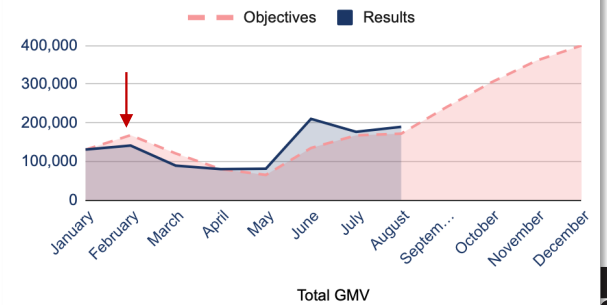
Total bookings



Hyper local - Layers



Monthly GMV 2020



Staying relevant and keeping customers from buying a car

Pre-COVID

Public transport -> 95%

Other modes -> 5%



Mid 2020

Public transport 75%

Other modes 25%

Corona effects March-June 2020:

Rental car +100-200%

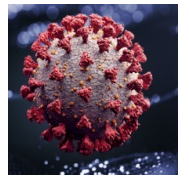
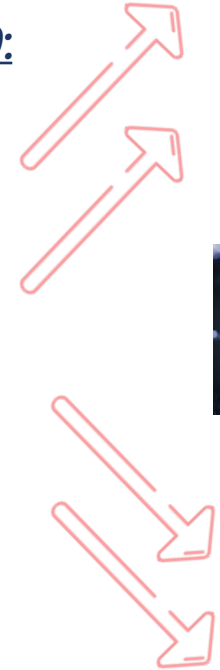
Car sharing +50-100%

Taxi -50-90%

Public transport -70-80%



*New service:
Monthly bike rental*

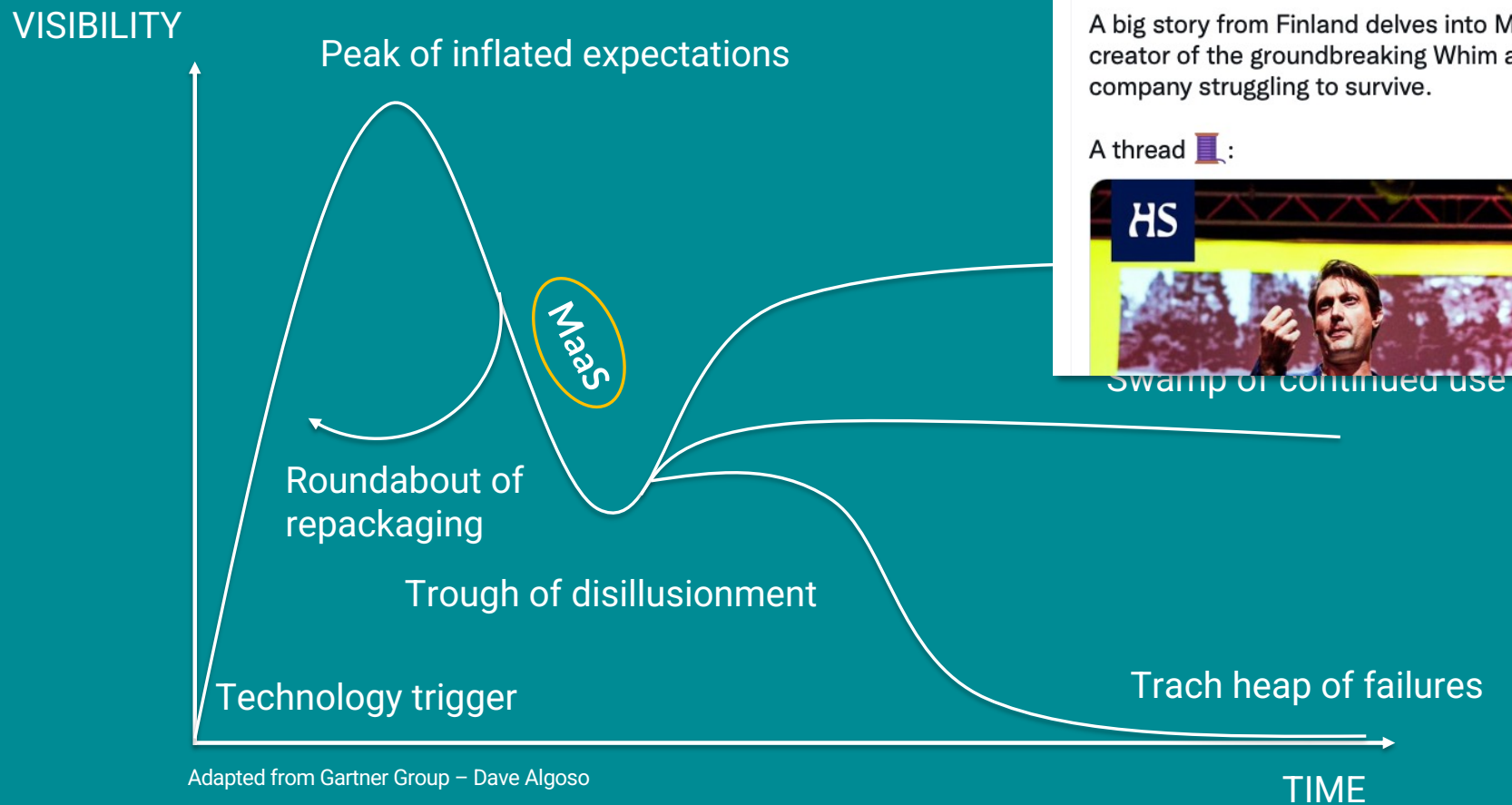




- Stängdes ner mars 2021
- Indirekt på grund av Corona
- Jag blev inte rik...

2

MaaS on the hype slope?



David Zipper
@DavidZipper

Does Mobility-as-a-Service have a future?

It's looking dicey.

A big story from Finland delves into MaaS Global—creator of the groundbreaking Whim app—and finds a company struggling to survive.

A thread 🧵:



Swamp of continued use

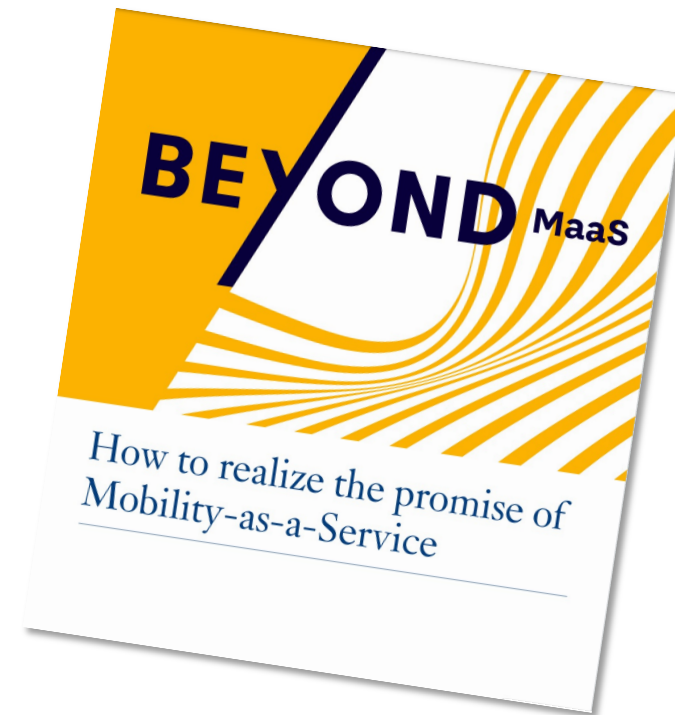
Det ser imponerande ut...

Arthur D Little

Figure 2: Overview of existing MaaS service offerings - Not necessarily exhaustive

Country	City/Region	Market Model ¹	Name	MaaS Operator ²	Business Model	Level of integration ¹	Status
Austria	Vienna	Open	WienMobil	Wiener Linien (PTO)	G2C	2	Operation
	Countrywide	Closed	Whim	Whim	B2C	2	Operation
			wegfinder	ÖBB	B2C	2	Operation
Belgium	Antwerp	Liberal	Whim	Whim	B2C	2	Operation
	Brussels	Open	MoveBrussels	STIB (PTO)	G2C	2	Pilot
			Skipr	Skipr	B2B2C	2	Operation
Czech Republic	Praha	Liberal	Citymove	SKODA AUTO Digilab	B2C	2	Operation
	Turku	Liberal	Whim	Whim	B2C	3	Operation
Finland	Helsinki	Liberal	Whim	Whim	B2C	3	Operation
	Mulhouse	Closed	Compte Mobilité	Mulhouse Alsace Agglo (PTA)	G2C	2	Operation
France	Saint-Etienne	Closed	Moovizy	STAS (PTA)	G2C	2	Pilot
	Munich	Closed	MVGO	MVG (PTO)	G2C	2	Operation
	Hanover	Closed	Mobilitätsshop	GVM (PTO)	G2C	2	Operation
Germany	Multiple cities	Liberal	REACH NOW	moovel Group	B2C/B2B2C	2	Operation
	Düsseldorf	Closed	redy	Rheinbahn AG (PTO)	G2C	2	Operation
	Berlin	Closed	Jelbi	BVG (PTO)	G2C	2	Operation
	Hamburg	Closed	hvv switch	Hamburg Hochbahn (PTO)	G2C	2	Operation
	Karlsruhe	Closed	KVV.mobil	KVV (PTO)/Mobimeo	G2C	2	Operation
	Leipzig	Closed	LeipzigMove	LVR (PTO)	G2C	2	Operation
	Aachen	Closed	movA	ASEAG (PTO)	G2C	2	Operation
Italy	Turin	Closed	ST	City of Turin	G2C	3	Pilot
	Rome	Liberal	KINTO Go	Toyota	B2C	2	Operation
Lithuania	Vinias	Liberal	Trafi	Trafi	B2C	2	Operation
Malta	Malta	Liberal	Meep	Meep	B2C	2	Operation
Netherlands	Amsterdam	Liberal	Amaze	Amaze Mobility	B2C	2	Pilot
	Eindhoven	Liberal	Turnn	ICT Group	B2B2C	2	Pilot
	Limburg	Liberal	glimble	Arriva (PTO)	B2C	2	Pilot
	Groningen-Drenthe	Liberal	Via-Go	Arriva (PTO)	B2C	2	Pilot
	Rotterdam/Den Haag	Liberal	Moves	Moves	B2B2C	2	Pilot
			9292	9292	B2C	2	Pilot
			Tranzer	Tranzer BV	B2C	2	Pilot
Twente	Liberal	Goan	Qarin Tranzer	B2C	2	Pilot	
Utrecht	Liberal	Gaiyo	Gaiyo	B2C	2	Pilot	
Portugal	Lisboa	Liberal	Meep	Meep	B2C	2	Operation
	Valencia, Malaga	Liberal	Meep	Meep	B2C	2	Operation
Spain	Barcelona	Closed	Meep	Aena (Airport)	B2C	2	Operation
	Madrid	Closed	MaaS Madrid	EMT (PTO)	G2C	2	Operation
	Madrid	Closed	Wondo	Ferrovial (PTO)	G2C	2	Operation
	Zaragoza	Closed	ZUM	City	G2C	2	Pilot
	Sevilla	Closed	Meep Sevilla	Globavia (PTO)	G2C	2	Operation
	Countrywide	-	RailMaaS	Renfe (RU)	B2C	2	Pilot
Sweden	Stockholm	Closed	Travis	Nobina (PTO)	G2C	2	Operation
	Göteborg	Liberal	LIMA	Lindholmen	B2B2C	2	Pilot
	Countrywide	Closed	Reis+	Samtrafiken	G2C/G2B2C	2	Operation
	Skåne	Open	MaaS in Skåne	Skånetrafiken (PTO)	G2C	2	Pilot
Switzerland	Zurich, Basel, Bern	Closed	yumuv	SBB (RU)	B2C	3	Pilot
	Geneva	Liberal	zenGo	TPG (PTO)	B2C	3	Pilot
UK	London	Liberal	Citymapper*	Citymapper	B2C	3	Operation
	West Midlands	Liberal	Whim	Whim	B2C	3	Operation
USA	Denver	Liberal	Uber Transit	Uber	B2C	2	Operation
	Florida	Closed	Brightline	Brightline (Rail)	B2C	2	Pilot
Australia	Sydney	Closed	iMOVE	SkedGo	B2C	3	Pilot
Japan	Greater Tokyo	Liberal	Whim	Whim	B2C	3	Pilot
	Tohoku	Liberal	Tohoku MaaS	East Japan Railway Company	B2C	2	Pilot
Colombia	Fukuoka area	Liberal	my route	Toyota Motor Corp.	B2C	2	Operation
	Bogota	Closed	MaaSapp	Vettica	B2C	2	Operation
Peru	Lima	Liberal	Wego	The Wego Company	B2C	2	Operation
UAE	Dubai	Closed	S'hail	RTA (PTA/PTO)	G2C	2	Operation

Only MaaS offerings from "level 2" of integration and that are currently active (in pilot or operation) are listed here. This excludes a long list of "level 1" offerings.



Hur mår MaaS?

- Mest piloter eller tjänster med begränsat användande
- Få städer/regioner som öppnat upp kollektivtrafiken
- Tvivlande mobilitetstjänsteleverantörer
- Sökande efter roller och affärsmodeller (forettingsmodeller)
- Super-app, Publik MaaS, B2B??
- Indikationer på rätt effekter, men inga bevis

Men.....





”A to B MaaS”

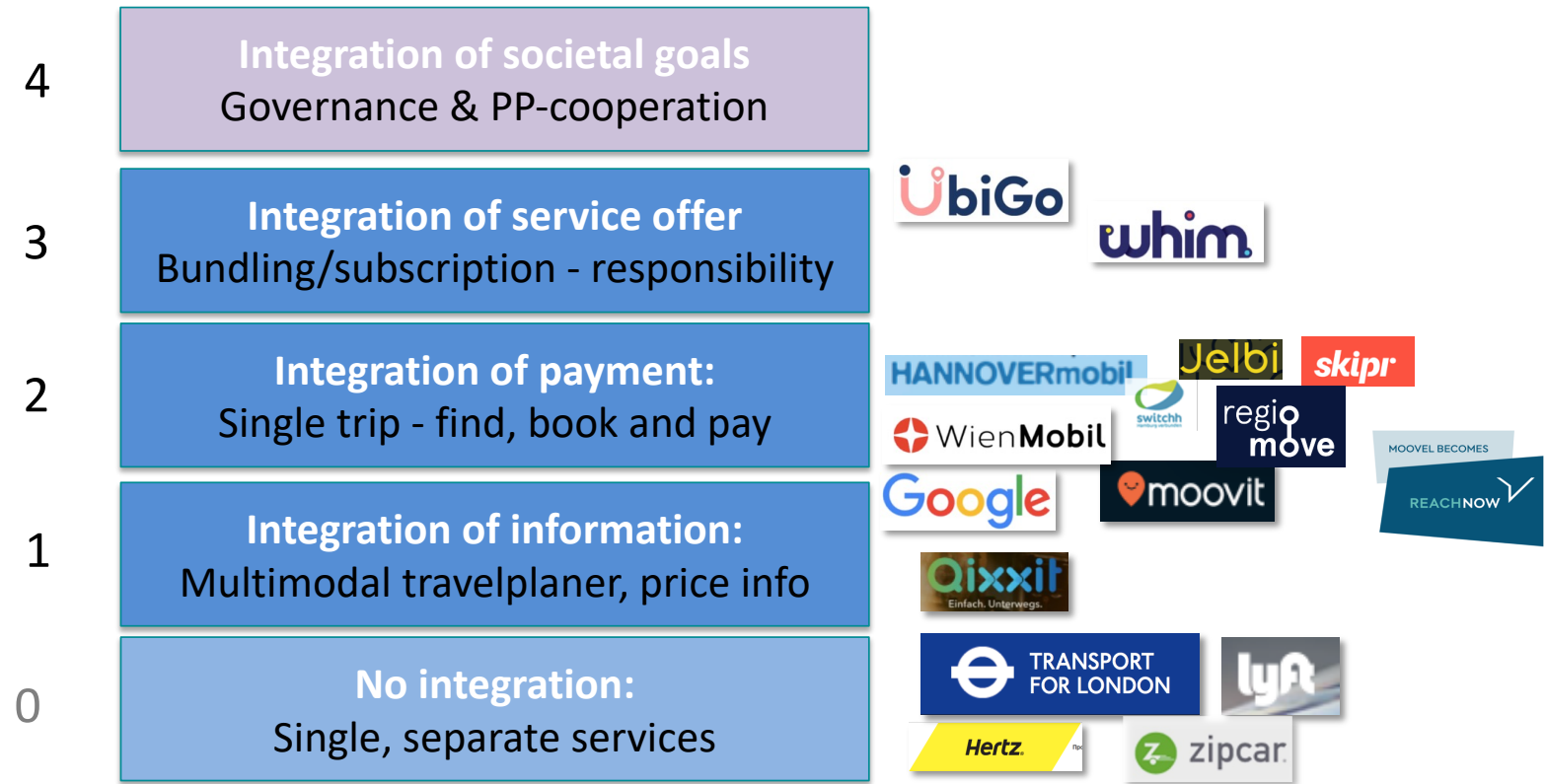
Single trip/ Intermodal

vs

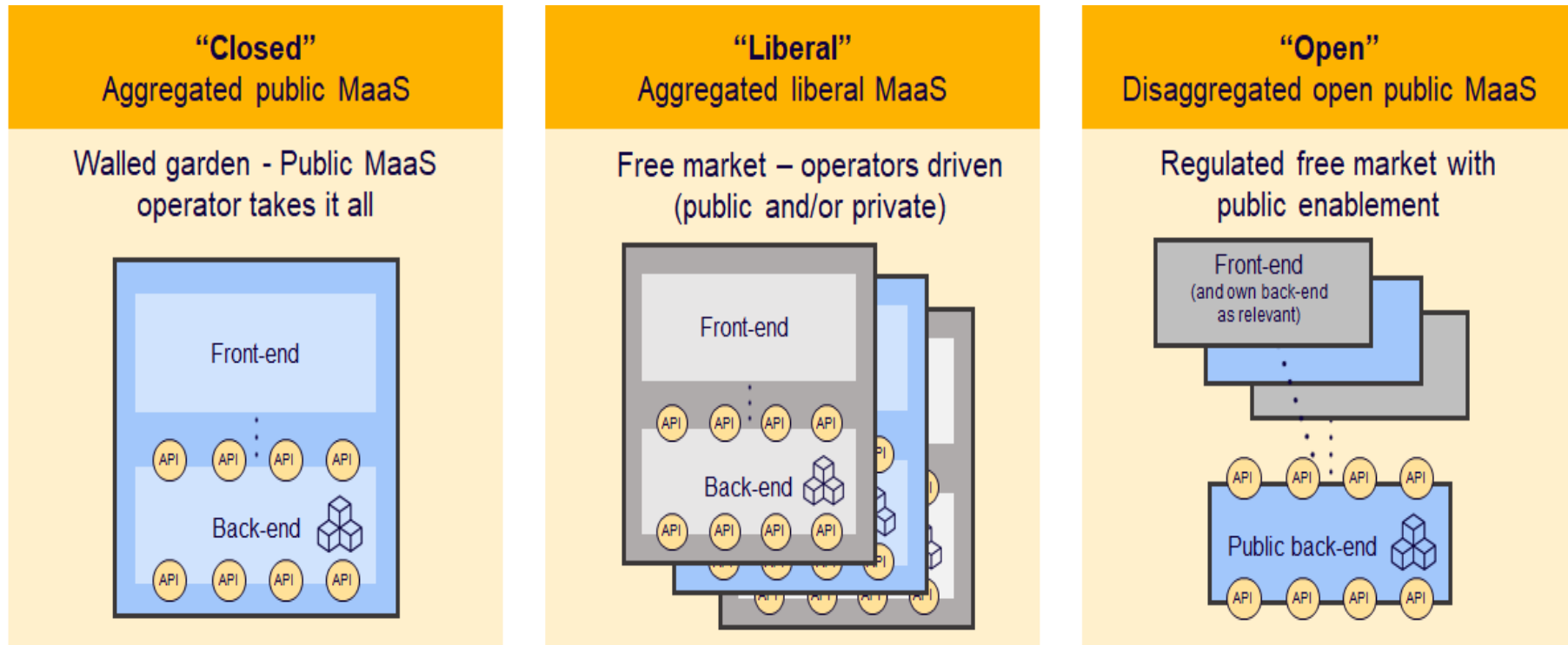
” Morning to evening MaaS”

All trips / multimodal

MaaS topology (Sochor, Arby, Sarasini, Karlsson, Holmberg)



The 3 market models, (originally by Martin Rörlef of Üstra, Hannover)



Multiplicity of MaaS offerings will drive UX... but public enablement is key

Source: Arthur D. Little, Future of Mobility lab

Public Authority (PTA/PTO)

Operators (public or private) or private MaaS operators

Mobility Data Lake

Exempel på kommersiella tjänster i drift

whim.

- Kommersiell MaaS
- Level 2,5; B2C
- Helsingfors + 5
- Bränt ca 70 m€
- Mest kända
- OK utbud
- 10' aktiva / månad
- Månadsomsättning ca 1 m€ i mitten av 2022

Travis

- Kommersiell MaaS
- Level 1,5; B2C
- Stockholm, Göteborg
- BoB-biljetter
- Del av Nobina
- Mest djuplänkningar
- 150' enkelbiljetter/må

skipr

- Kommersiell MaaS
- Level 2; B2B
- Belgien
- Mobility budgets
- Huvudägare från "bilvärlden"
- Säger sig bli mer Fintech än MaaS

Grab M fl

- Kommersiell Super-app
- B2C & B2B
- Taxi/ridehail
- Leveranser
- Försäkring, betaltjänster mm



~~Zipster~~

~~ÜbiGo~~

~~KYYTI~~

Exempel på PTA-roller



- Offentlig MaaS
- Level 2; B2C
- Berlin
- Bästa app
- Störst utbud
- >100' användare
- Användande?



- Marknadsdriven
- 3:e partsförsäljning
- BoB-biljetter
- 3-5% kommission
- 2 nivåer
- **Inte pilot**



STIB, Bryssel

PPP/Open backend

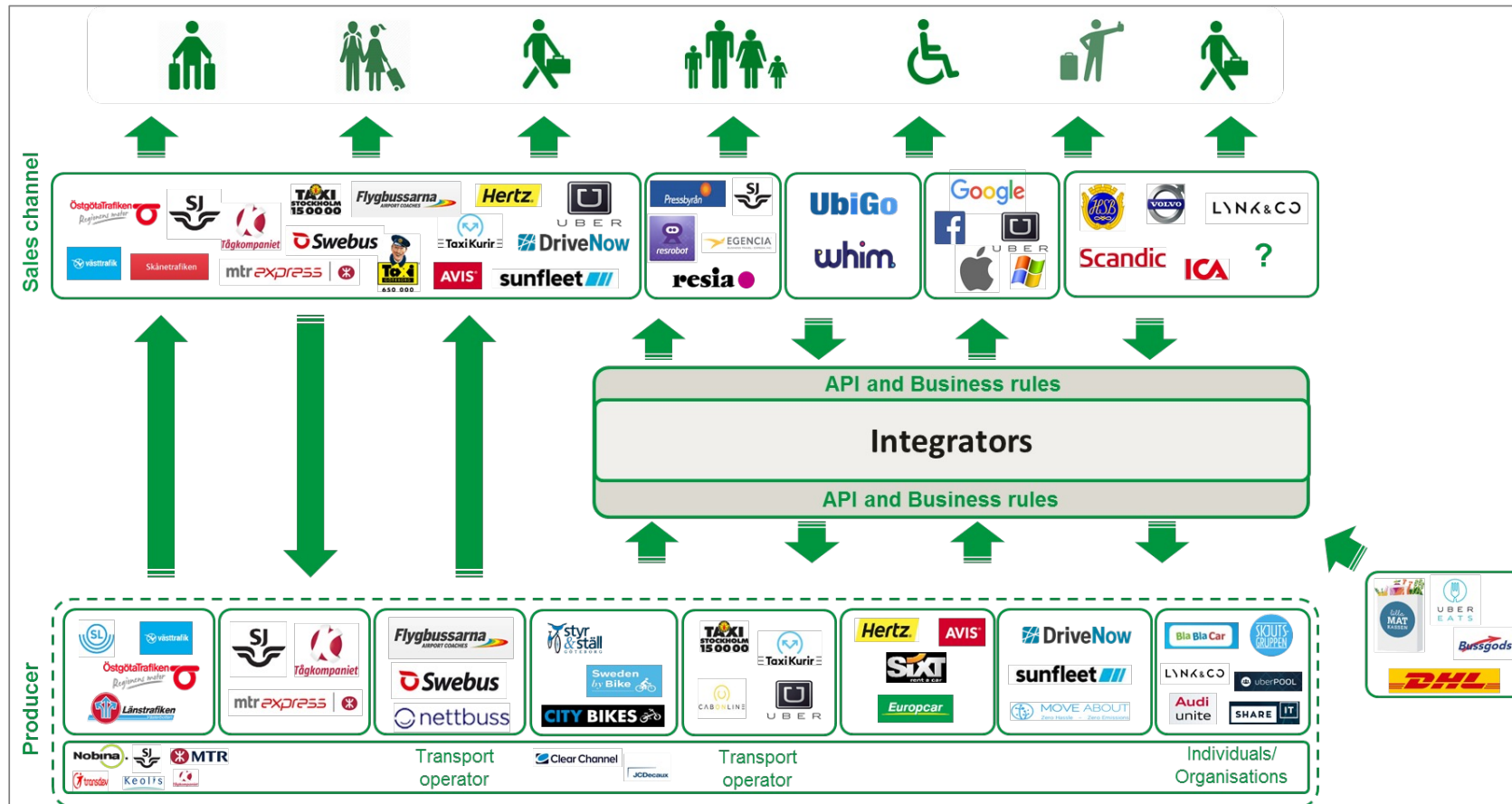
- Egen MaaS + ...
- ...plattform för andra
- Data-lake
- Utveckling påbörjad (Trafi)



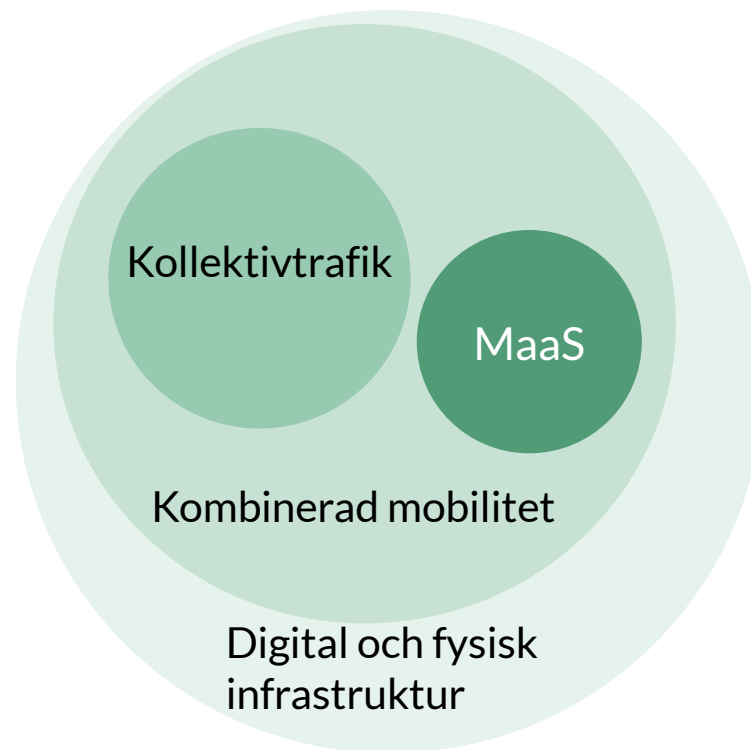
Samtrafiken

"Swedish Mobility Program"

(nedlagt 2018)



Region och städer har en nyckelroll för både kombinerad mobilitet (ekosystemet) och MaaS (tjänstefieringen), men de kan vara olika i olika geografier



Nästan slutord

- MaaS är inte Netflix för mobilitet
- MaaS är inte en app, utan en distributionsmodell
- Olika typer av MaaS passar olika typer av aktörer
- Låt tusen blommor blomma
- Utan bra mobilitetstjänster blir det inga bra MaaS-tjänster
- En tjänst måste skapa värde, oavsett vem som driver

A photograph of a city street in autumn. The scene is captured from a low angle, looking down a paved sidewalk. Two women with backpacks are walking away from the camera in the foreground. In the middle ground, a cyclist is riding down the street. The trees lining the street have yellow and orange autumn leaves. A utility box with the number 5101 is visible on the right side of the sidewalk. The overall atmosphere is bright and clear, suggesting a sunny day.

**MaaS can never replace good city planning,
attractive public transport and great biking
and walking infrastructure**

Just det, åter till frågan:

Nei, det er ikke flere konsulenter som jobber med MaaS enn kunder som bruker det,

men de tjener bra mye mer än de som prøver sig på å levere MaaS...

Tack för att ni lyssnat!



9-12 JUNE
STOCKHOLM 2019
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