

The 5th Fluidtime MaaS Symposium

Mastering the balance between collaboration and competition



In September 2020, for the fifth year in a row, Fluidtime brought together international transport executives and Mobility-as-a-service (MaaS) experts to discuss the current state of MaaS. This year, the symposium took place in a virtual format due to the sanitary constraints linked to the COVID-19 pandemic. More than 200 executives from 11 countries registered to spend a day uncovering this year's theme: "Mastering the balance between collaboration and competition."

The agenda focused on inspirational talks and panel discussions around MaaS ecosystems: how to frame them, how to create value flows and how to empower the transition.

Michael Kieslinger, CEO of Fluidtime Data Services GmbH, welcomed the participants by presenting this year's theme around the balancing act between collaboration and competition in the MaaS ecosystem. He started by underlining the current challenges of MaaS deployment and insisted on the need that all stakeholders (public authorities, MaaS operators, transport service providers and technology suppliers) have a role to play to turn things around. Mr. Kieslinger pointed to the fact that each of these stakeholders are often contemplating to develop their own solution and that, to break these silos, a different collaboration model – one that is more circular and less centric – would be beneficial. To conclude, he explained that the working sessions were articulated around how to manage the "space" between players and their way of interacting with each other.

[Welcome and introduction by Michael Kieslinger](#)



The 5th Fluidtime MaaS Symposium included three sessions:

1. Framing the MaaS ecosystem
2. Creating value flows
3. Empowering the transition

Session 1: "Framing the MaaS ecosystem"

The first session opened with an inspirational talk from **Dr. Anne Faber** from RWTH Aachen University and focused on how to best define an ecosystem, how to visualize it and how it applies to MaaS. Dr. Faber started by reminding the origin of the concept of business ecosystems, highlighting that successful businesses are those that use all resources available to reach their goals, including ones outside their own direct perimeter. The ecosystem thus goes beyond the traditional supply chain and transcends "old school" competition.

The first poll of the day among all participants indicated a lack of transparency in the identification of stakeholders in an ecosystem, reported by more than 35% of participants. Indeed, two main challenges in ecosystems' description are (1) the availability and relevance of data and (2) the integration of different perspectives. To undertake these challenges, Dr. Faber described a four-step approach to best visualize business ecosystems, illustrated by a visualization of the German business mobility ecosystem with a focus on Bavaria. After this demonstration, 80% of the symposium participants agreed that visual tools have the potential to improve collaboration in ecosystems.

After a Q&A session, Dr. Faber was joined by panelists **Silvia Kaupa-Götzl**, Managing Director at ÖBB Postbus; **Rex Deighton-Smith**, Project Manager at International Transport Forum; and **Georg Wagner**, Managing Partner at Spirit Design. The panel discussion focused on how to overcome the key challenges of well-functioning ecosystems to maximize value.

“We are so used to competing with each other that we still have to learn how to collaborate.”

– Silvia Kaupa-Götzl
 Managing Director, ÖBB Postbus

Key **insights** from the session:

- Successful businesses are the ones that go beyond their traditional supply chain and transcend competition.
- Virtuous ecosystems are hard to set up due to power struggles concerning data and customers ownerships, role definition and leadership of initiatives.
- Public authorities could play an important role in framing and enabling collaboration, through regulating new mobility solutions and setting clear rules for data sharing to foster virtuous ecosystems.
- Whatever the ownership of mobility data will be, it is ultimately the user who will decide which transportation modes to use – hence, user experience remains the critical factor.

“Governments will have to play a substantial role to realize the full potential of MaaS.”

– Rex Deighton-Smith
 Project Manager, International Transport Forum

Session 2: “Creating value flows”

The afternoon session kicked off with an inspirational talk by **François-Joseph Van Audenhove**, Partner at Arthur D. Little and head of Arthur D. Little’s Future of Mobility Lab. The topic of his keynote speech was “Realizing the MaaS promise? Current limitations and forward-looking requirements.”

The keynote began by reminding the audience that eventually all stakeholders would benefit from MaaS deployment: the consumer, cities/authorities and mobility solution providers (MSPs). He continued by detailing the latest evolutions in MaaS environment, business models and offerings such as the acceleration of MaaS deployment enablers (digitalization of ticketing, data sharing regulations, etc.), the increase of public-led (G2C) MaaS initiatives and the emergence of regional MaaS initiatives and B2B offerings.

Mr. Van Audenhove then highlighted some limitations of current MaaS endeavors, such as the difficulty of current platforms to reach sufficient adoption and scale to reach economic viability, and the fact that most expected benefits have yet to materialize. He raised a major yet provocative question: Is there a real business case for MaaS, or are we all going after a ghost?

Limitations of current MaaS endeavors

- **Time to market:** deployment of MaaS platforms not going as fast as expected.
- **User adoption:** MaaS offerings have found little traction and modal shift promise not yet delivered.
- **PTO’s resistance:** lack of clear partnership models with MaaS operators is a major obstacle.
- **Consumer-facing B2C MaaS platforms haven’t yet reached scale and economic viability.**
- **Expected benefits for MSPs** (reduced acquisition & service costs) not materializing.

Is there a real business case for MaaS, or are we all going after a ghost?

Source: Arthur D. Little, Future of Mobility Lab

To tackle the question of financial outlook, each MaaS business model was reviewed individually. The B2C business model requires scale to reach break-even on a commission-based model. The subscription-based model has a higher potential but requires a sufficiently attractive offer to build trust and trigger a change of behavior. While G2C models face the same barriers, larger public benefits could be considered in the equation, which could justify the investment. Finally, B2B(2C) is an interesting business model as it could accelerate user adoption and constitute a viable business model given additional revenues through sales of additional business services.

The audience was then invited to take a step back and consider the prerequisites for accelerated MaaS deployment and adoption as well as forward-looking requirements to realize the MaaS promises. Prerequisites concern integration of all modes (including ultimately the private car!), data sharing regulations and open ticketing/payment for all modes, collaboration between public and private actors and the need for investments in physical services and infrastructure. Forward-looking requirements emphasize the need for increased public-private collaboration and mastering the ecosystem play, as well as setting up a unified governance to create shared value.

“A unified mobility management model would help to fully extract value at the system-level ... Can we make it happen?”

– François-Joseph Van Audenhove
 Partner, Arthur D. Little

A panel discussion followed with **Eric Mink**, Program Manager MaaS at the Dutch Ministry of Infrastructure and Water Management; **Karina Licea Viñas**, Public Policy Affairs at Dezba; and **Jenny Milne**, Owner at JLM and PhD researcher on rural MaaS. The panel started by emphasizing the importance of a user-centric approach to MaaS. Mr. Mink presented the project led in the Netherlands and insisted on the need for scale. Ms. Licea Viñas iterated on the importance to integrate all public and private mobility solutions into the MaaS offering, especially in rural areas where public transport and new mobility solutions is often not sufficient to cover all needs.

The discussion shifted to data management and ownership and on the importance of building trust around the sharing of data, both among MSPs as well as towards users. In the example of the Netherlands, data is shared into a common national learning platform supervised by public authorities, highlighting the possible role that authorities could act as guarantor to build trust around data sharing.

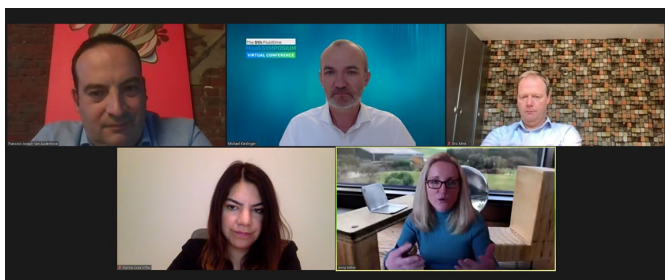
“Winner takes all is to be replaced by win-win situation.”

– Eric Mink

Program Manager MaaS, Dutch Ministry of Infrastructure and Water Management

Panelists also discussed the requirements to improve the MaaS business case, including the need to further develop the attractiveness of the public transport system and its interfaces with other mobility modes. Looking at a broader perspective, it seems to be not only about the business case, but also about the value case for society as a whole.

Lively debate on how to maximize value of MaaS



Key **insights** from the session:

- MaaS is more than digital experience: sound city mobility policy is required to build trust and drive adoption (i.e., physical services and infrastructure investment).
- Realizing the MaaS promise will require a more comprehensive take as well as increased collaboration among public and private stakeholders to fully extract value at the system level.

- There is no one-size-fits-all in terms of MaaS business models, and several business models can complement each other to increase the value of the offering.
- “Data is the new oil” and a sound data sharing policy will be critical to allow for multiple stakeholders to collectively realize the MaaS promise.
- Further effort and openness are required (especially by cities and PTOs) to enable MaaS to deliver its promises, even though some enablers have already materialized.
- The B2B MaaS business model, complementary to other MaaS offerings, has strong potential to facilitate a shift in user behavior.

Session 3: “Empowering the transition”

The last session of the day was introduced by **Alexander Chulok** from HSE University Moscow. The topic of his presentation was “How does the near future of mobility look like? Foresight, challenges and trends.”

The economist studied which trends are likely to shape our future, taking a larger perspective than mobility only. He used the mathematical and econometric tool iFORA to provide an analytical perspective of trends coming from multiple sources. The tool isolated six main clusters of global trends (economic and structural, social, environmental, political and institutional, technological and value-based) and provided a semantic map based on each cluster. Additionally, it considered the influence of “wildcards” like COVID-19.

Next, Alexander Chulok introduced the concept of Mobility-as-a-philosophy (MaaP) driven by a new production paradigm (faster, customized production), transformation of the global value chain, a move to an “action” economy driven by system integrators, change in the employment structure and a new education model based on building the skills portfolio. To conclude, the economist insisted on the needs of coordination across all actors in a fast-changing world.

The presentation was again followed by a panel discussion with **Isabelle Vandoorne**, Deputy Head of the Sustainable and Intelligent Transport unit at the DG Move, European Commission; **Lukas Ertl**, Head of Communication at Organization for International Economic Relations; and **Katharina Rogenhofer**, Project Leader at Climate Referendum Austria.

“Climate change is no longer a wildcard because we know where we are heading if we continue to raise emissions as we are doing now.”

– Katharina Rogenhofer

Project Leader, Climate Referendum Austria

The panel focused the debate on climate change issues and the impact that it will have on mobility as well as the role that MaaS can play as a means to facilitate the use of shared transportation solutions and therefore use less resources for individual mobility. Ms. Vandoorne put forward the European Green Deal as an extensive action plan to fight climate change. Mobility is one of the pillars of the Green Deal and DG Move is actively working on how to frame and enable MaaS platforms to set the necessary rights and duties for them, as well as in ensuring the right level of trust in the system. At the city-level, Mr. Ertl insisted that quality of service is key, and mobility should always keep a user-centric approach. Other participants agreed by highlighting the fact that both city infrastructure and regulation must be built to support user mobility in order to be effective.

Next, the panel agreed that the impact of COVID-19 in terms of mobility and working-from-home behavior is likely to last even after the pandemic. Moreover, the current situation offers opportunities for cities to test new mobility solutions in real conditions. Panelists also insisted during the Q&A session on the fact that regulation should always favor the mode of transportation with the least resource consumption in order to support the most sustainable mobility, always taking into account the needs of users and collaborating with all stakeholders.

“Collaboration is building the foundation to a sustainable transformation, and MaaS is playing an important part in this process.”

– Lukas Ertl

Head of Communication at Organization for International Economic Relations

Key **insights** from the session:

- Determining what the future will look like is an art given wildcards like COVID-19.
- Climate change is set to be the priority in the future and MaaS, if well framed, can be a strong enabler to ease a shift away for more polluting transport solutions.
- Regulators have to play an active role in supporting this transition.

For all presentations of the 5th Fluidtime MaaS symposium, please visit: www.fluidtime.com/en/maas-symposium-2020/

Outlook and event planning for 2021

The 6th Fluidtime MaaS Symposium will take place in September 2021 in Vienna, with the key theme of “the ecosystem play.” The format of the 2021 edition will include keynote speeches and panel discussions but will further drive the experience by adding workshops around represented “MaaS ecosystems,” with each participant allocated to a specific ecosystem in the workshops, based on localization (city, region or country) and interest.

Fluidtime MaaS Symposium 2021

In the upcoming 2021 edition of the Fluidtime MaaS Symposium, Arthur D. Little will act as knowledge partner. In the coming months, Fluidtime and Arthur D. Little will organize a series of virtual meetings with individuals interested to act as MaaS ambassadors representing specific ecosystems. The ambassadors will learn about the workshop settings and methods and take a prominent role in facilitating a concrete workshop based on real use cases during the event.

For more information and details on how you can become a MaaS ambassador, please contact Stefanie Pichler via mail at stefanie.pichler@fluidtime.com

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Fluidtime

Fluidtime is a leading technology partner for companies and public authorities in the introduction and operation of MaaS offerings. Fluidtime's white label solutions allows them to combine the search, booking and payment of various means of transport in one app service. In addition, Fluidtime offers cities and regions a data tool to regulate the mobility market and to define and evaluate the effects of measures for individual transport. The MaaS platform serves as the basis for achieving climate targets. With its MaaS technologies, Fluidtime supports all stakeholders in the urban or regional ecosystem in providing smart mobility solutions for travelers.

For further information, please visit www.fluidtime.com

Arthur D. Little

Arthur D. Little has been at the forefront of innovation since 1886. We are an acknowledged thought leader in linking strategy, innovation and transformation in technology-intensive and converging industries. We navigate our clients through changing business ecosystems to uncover new growth opportunities. We enable our clients to build innovation capabilities and transform their organizations.

The Future of Mobility Lab is Arthur D. Little's contribution to tackling the urban mobility challenge. Arthur D. Little aims to use its Future Lab to support cities and nations in shaping the extended mobility ecosystems of tomorrow and as a catalyst to enable and facilitate an open dialogue between mobility stakeholders.

For further information, please visit www.adlittle.com or contact futuremobility.lab@adlittle.com