



UbiGo

Mobilitet til lunjs 3 maj 2022

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

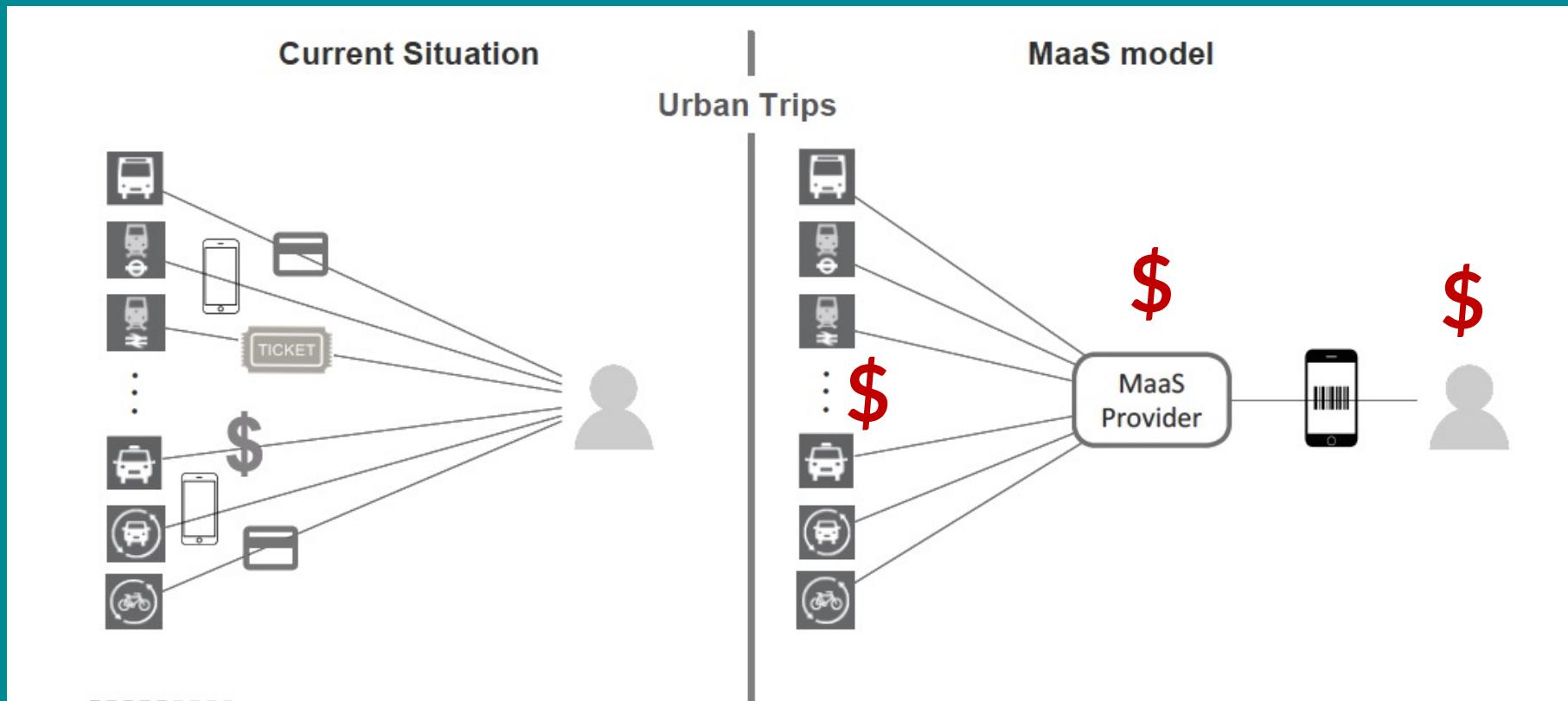
[Hans.arby@ri.se](mailto:Hans.arby@ri.se)

<http://ri.se>



RI.  
SE

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



Kamargianni

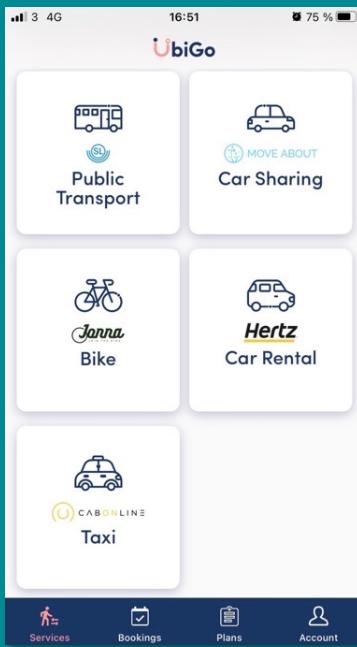
A photograph of a city street in San Francisco. In the foreground, a person in a red jacket walks away from the camera. In the middle ground, a man in a suit rides a bicycle towards the camera. In the background, a white Muni bus is stopped at a bus stop. A large building with many windows is visible on the left, and trees with yellow autumn leaves line the street. The overall atmosphere is bright and sunny.

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

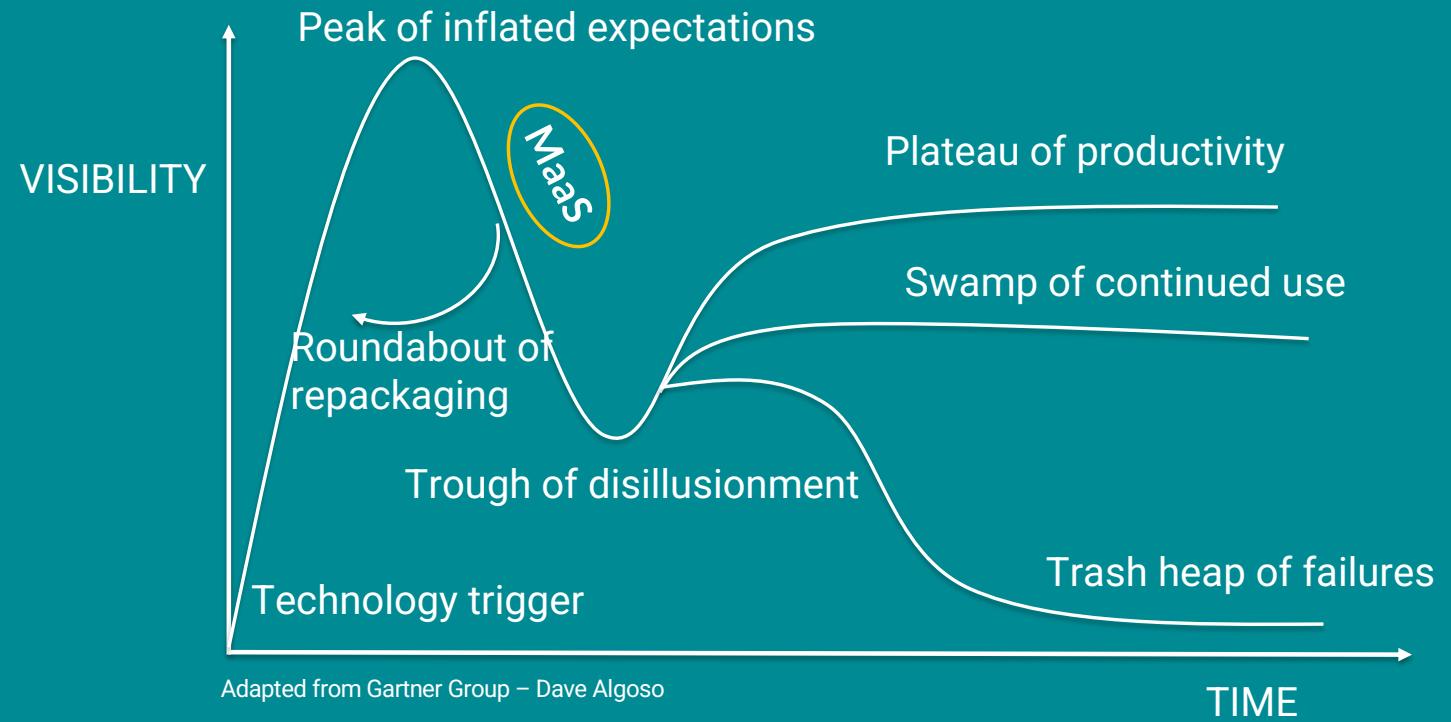
Gothenburg pilot

2013-2014

Stockholm operation

2019-2021

2



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:

- 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

Convenience Economy

Before

Environment

**Curiosity**

At the  
end

Convenience Economy

Environment Curiosity

## The Gothenburg pilot 2013-2014

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## Satisfaction with transport



## Travel diaries (all users, all trips)

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

## 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%

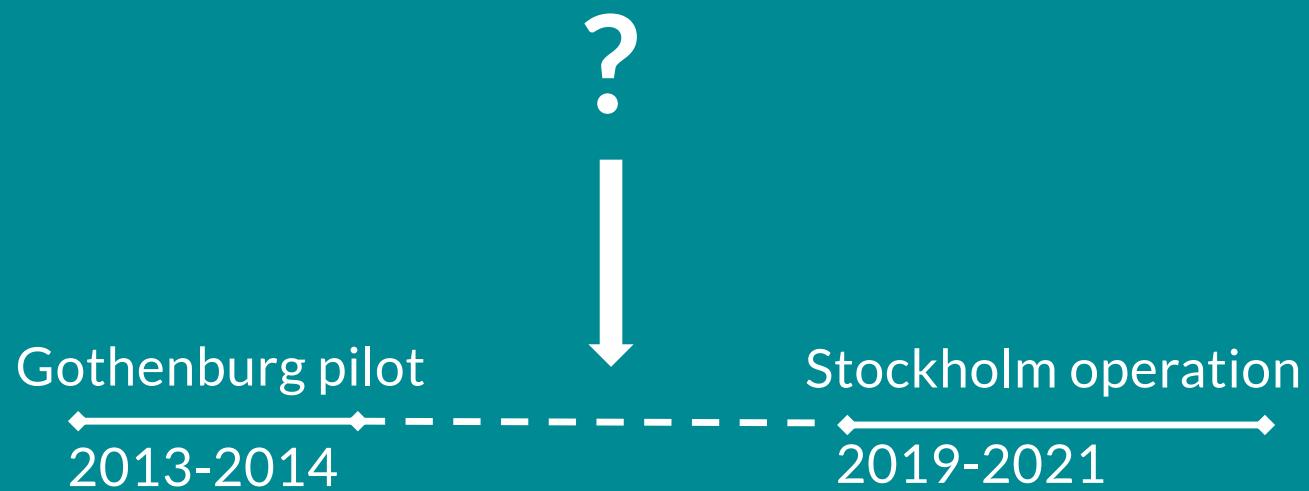


Typiska pilot-problem

Typiska start-up-problem

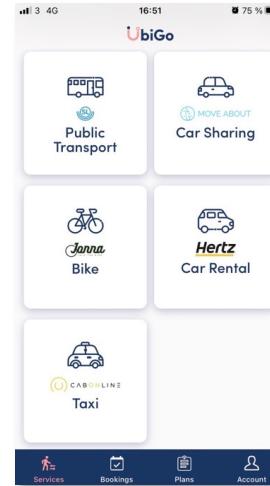
Kollektivtrafiken (Västtrafik)

Mobilitetsmarknaden i sig



*"Det är aldrig för sent 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**

Via ID's news

Via ID invests in MaaS with UbiGo

Posted on 18 March 2019

A changing mobility market These last years, mobility market has been shaken up by the arriva

**UbiGo**

Vanliga frågor Tjänster Nyheter

**Resetjänster för dig och din familjs vardagsresande.**

Genom att samlta din familjs resesövner under ett tak slipper du hantera kontakt och betalningar hos olika reseföretag. Spara tid, få bättre priser och en samlad översikt över era utgifter med UbiGo.

Ladda ned appen och följ med oss på en hållbar resa!

GET IT ON Google Play Download on the App Store



Left to right: Helene Carlsson (City of Stockholm), Anders Adrem (Cabonline), Jacob Hammarback (Move About), Hans Arby (UbiGo), Johan von Porat (UbiGo), Stefan Thulin (SL)

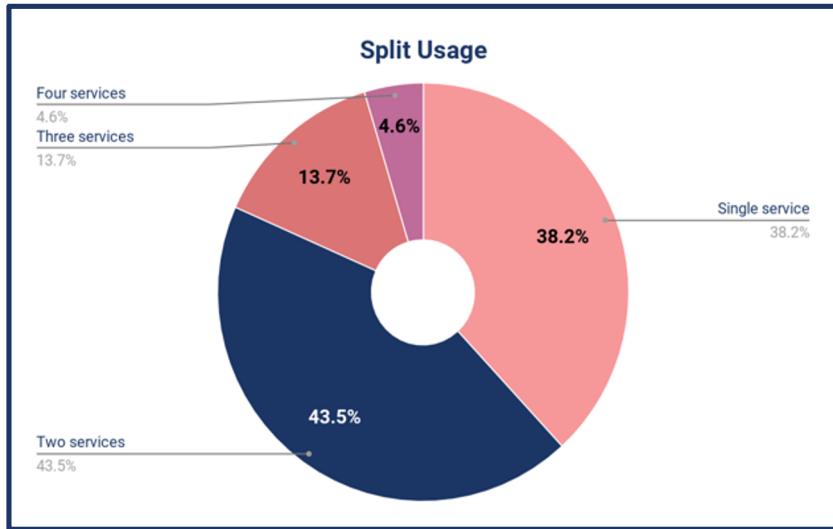
PRESSMEDDELANDE - 2 MAJ 2019 10:17

**ENG: Newly launched travel service puts Stockholm firmly on the sustainable travel map**



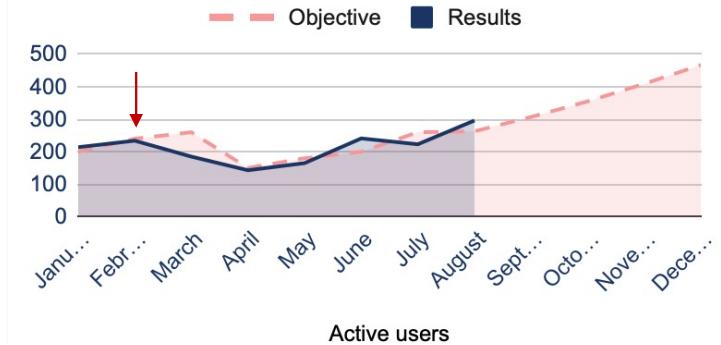
On April 24, the new UbiGo travel service was launched in Stockholm, making the

# 2020

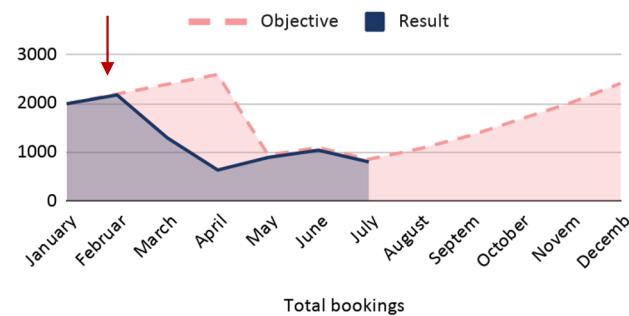


NPS  
70  
Churn  
6%

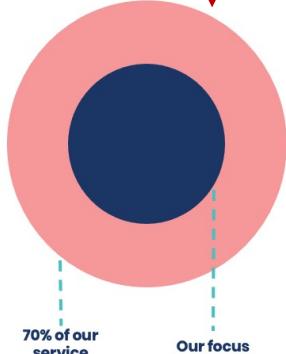
### Active users



### 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%



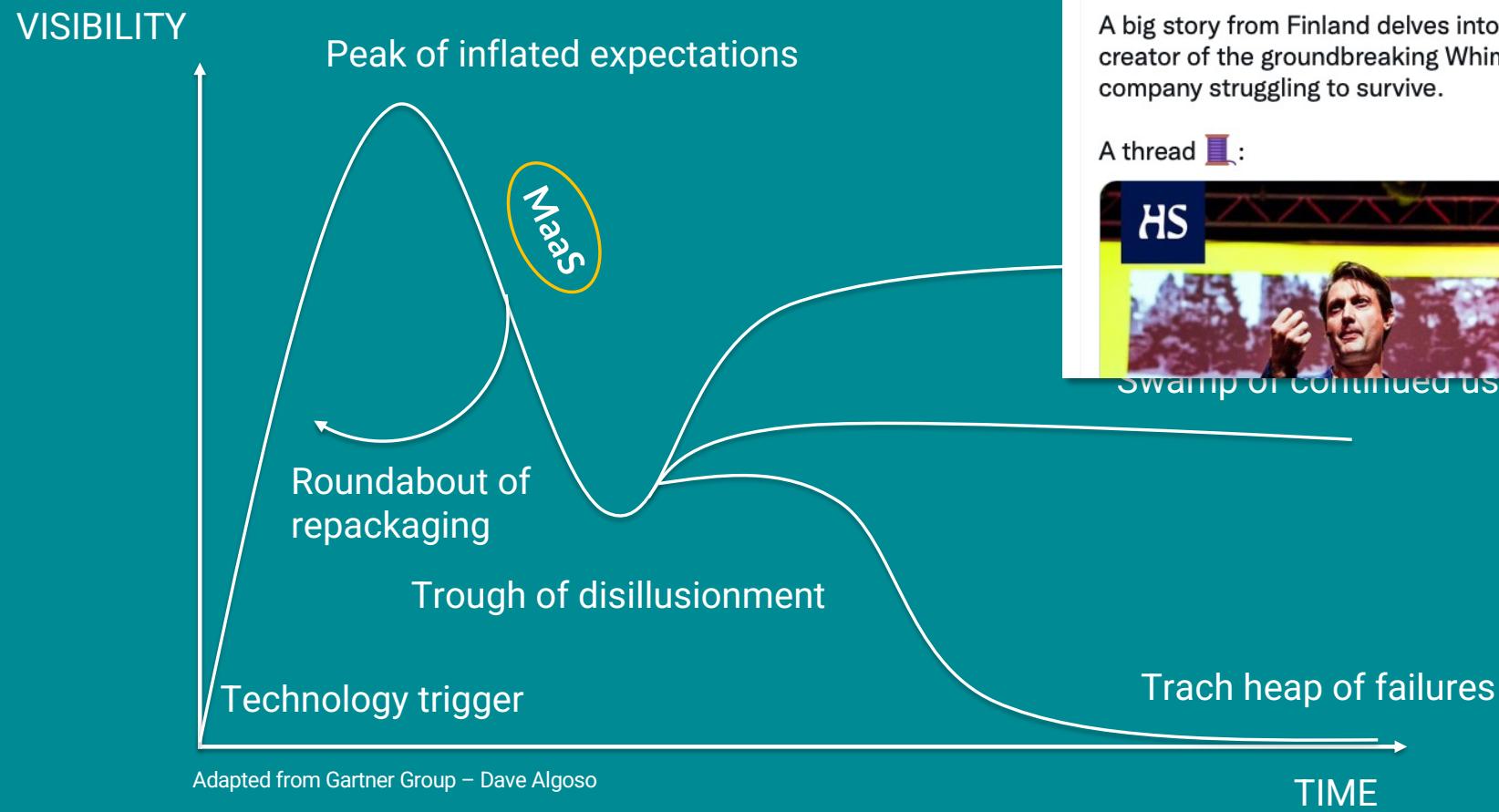
New service:  
*Monthly bike rental*





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

# 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.

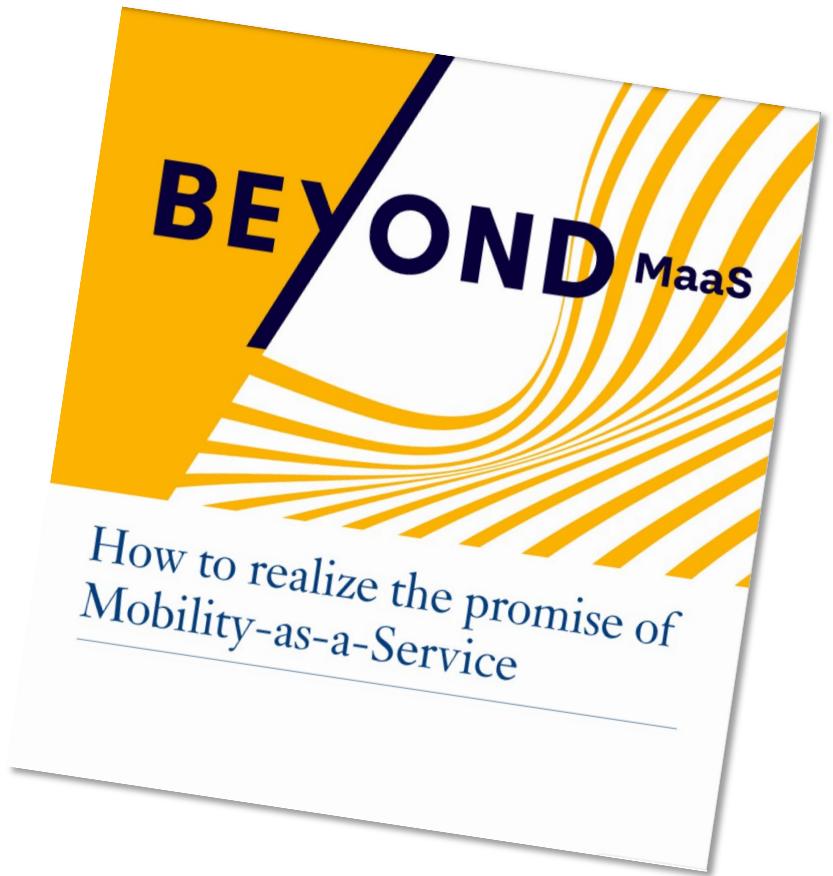
A thread 🧵:



Swamp of continued use

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

Country	City/Region	Market Model <sup>1</sup>	Name	MaaS Operator <sup>2</sup>	Business Model	Level of integration <sup>3</sup>	Status
Austria	Vienna	Open	WienMobil	Wiener Linien (PTO)	G2C	2	Operation
	Countrywide	Closed	Whim	Whim	B2C	2	Operation
Belgium	Antwerp	Liberal	wegfinder	OBB	B2C	2	Operation
	Brussels	Open	Whim	Whim	B2C	2	Operation
	Multiple cities	-	MoveBrussels	STIB (PTO)	G2C	2	Pilot
Czech Republic	Praha	Liberal	Skipr	Skipr	B2B2C	2	Operation
Finland	Turku	Liberal	Citymove	SKODA AUTO DIGILAB	B2C	2	Operation
	Helsinki	Liberal	Whim	Whim	B2C	3	Operation
France	Mulhouse	Closed	Compte Mobilité	Mulhouse Alsace Agglo (PTA)	G2C	2	Operation
	Saint-Etienne	Closed	Movoozy	STAS (PTA)	G2C	2	Pilot
	Munich	Closed	MVG	MVG (PTO)	G2C	2	Operation
Germany	Hanover	Closed	Mobilitätsshop	GVH (PTO)	G2C	2	Operation
	Multiple cities	Liberal	REACH NOW	moovel Group	B2C/B2B2C	2	Operation
	Düsseldorf	Closed	redy	Rheinbahn AG (PTO)	G2C	2	Operation
Italy	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
Lithuania	Leipzig	Closed	LeipzigMove	LVB (PTO)	G2C	2	Operation
	Aachen	Closed	movA	ASEAG (PTO)	G2C	2	Operation
	Turin	Closed	ST	City of Turin	G2C	3	Pilot
Malta	Rome	Liberal	KINTO Go	Toyota	B2C	2	Operation
Lithuania	Vilnius	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
Portugal	Groningen-Drenthe	Liberal	Via-Go	Arriva (PTO)	B2C	2	Pilot
	Rotterdam/Den Haag	Liberal	Moves	Moves	B2B2C	2	Pilot
	Twente	Liberal	9292	9292	B2C	2	Pilot
Spain	Utrecht	Liberal	Tranzer	Tranzer BV	B2C	2	Pilot
	Lisboa	Liberal	Goan	Qarin Tranzer	B2C	2	Pilot
	Valencia, Malaga	Liberal	Gaiyo	Gaiyo	B2C	2	Pilot
Sweden	Barcelona	Closed	Meep	Meep	B2C	2	Operation
	Madrid	Closed	MaaS Madrid	Aena (Airport)	B2C	2	Operation
	Zaragoza	Closed	Wondo	EMT (PTO)	G2C	2	Operation
Switzerland	Sevilla	Closed	ZUM	Ferrovial (PTO)	G2C	2	Operation
	Countrywide	-	Meep Sevilla	City	G2C	2	Pilot
	Zürich, Basel, Bern	Closed	Meep Sevilla	Globalvia (PTO)	G2C	2	Operation
UK	Stockholm	Closed	Travis	Renfe (RU)	B2C	2	Pilot
	Göteborg	Liberal	Nobina (PTO)	Nobina (PTO)	G2C	2	Operation
	Countrywide	Closed	LiMA	Lindholmen	B2B2C	2	Pilot
USA	Skåne	Open	Reis+	Samtrafiken	G2C/G2B2C	2	Operation
	Zurich, Basel, Bern	Closed	MaaS in Skåne	Skånetrafiken (PTO)	G2C	2	Pilot
	Geneva	Liberal	yumuV	SBB (RU)	B2C	3	Pilot
Australia	London	Liberal	zenGo	TPG (PTO)	B2C	3	Pilot
	West Midlands	Liberal	Citymapper*	Citymapper	B2C	3	Operation
	Denver	Liberal	Whim	Whim	B2C	3	Operation
Japan	Florida	Closed	Uber Transit	Uber	B2C	2	Operation
	Sydney	Closed	Brightline	Brightline (Rail)	B2C	2	Pilot
	Greater Tokyo	Liberal	imOVE	SkedGo	B2C	3	Pilot
Colombia	Tohoku	Liberal	Whim	Whim	B2C	3	Pilot
	Fukuoka area	Liberal	Tohoku MaaS	East Japan Railway Company	B2C	2	Pilot
	Bogota	Closed	my route	Toyota Motor Corp.	B2C	2	Operation
Peru	Lima	Liberal	MaaSapp	Vettica	B2C	2	Operation
UAE	Dubai	Closed	Wego	The Wego Company	B2C	2	Operation
<small>Only MaaS offering 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.</small>							



## Hur mår MaaS?

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

Men.....





"A to B MaaS"

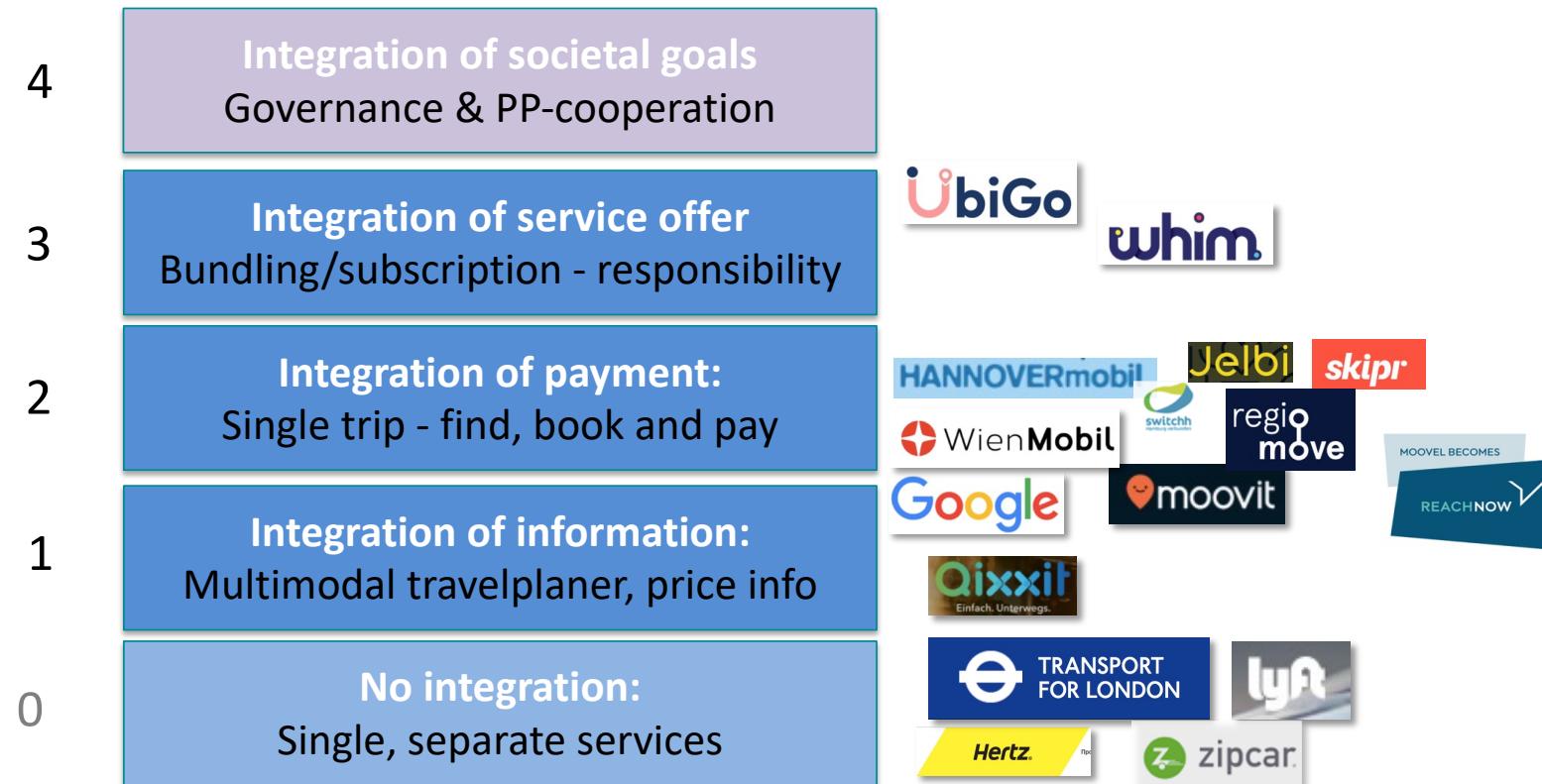
Single trip / Intermodal

vs

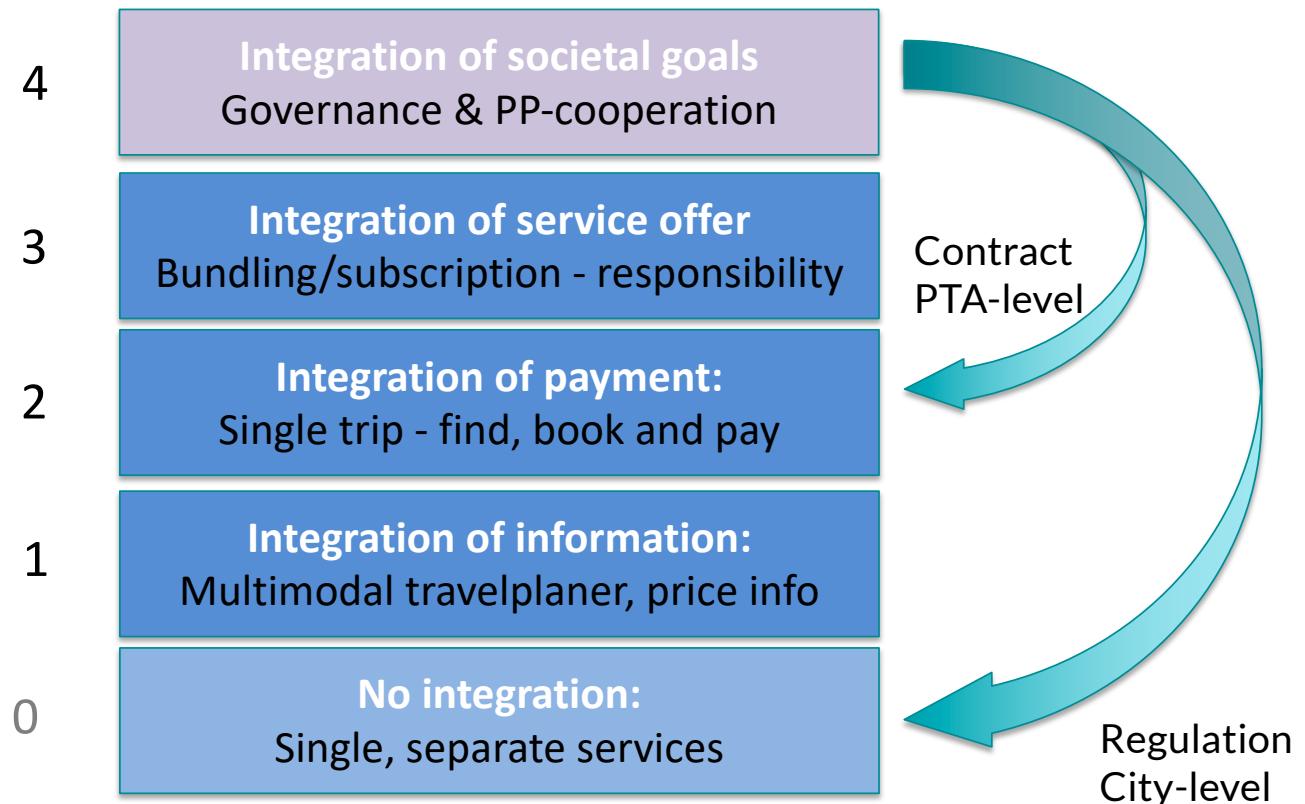
"Morning to evening MaaS"

All trips / multimodal

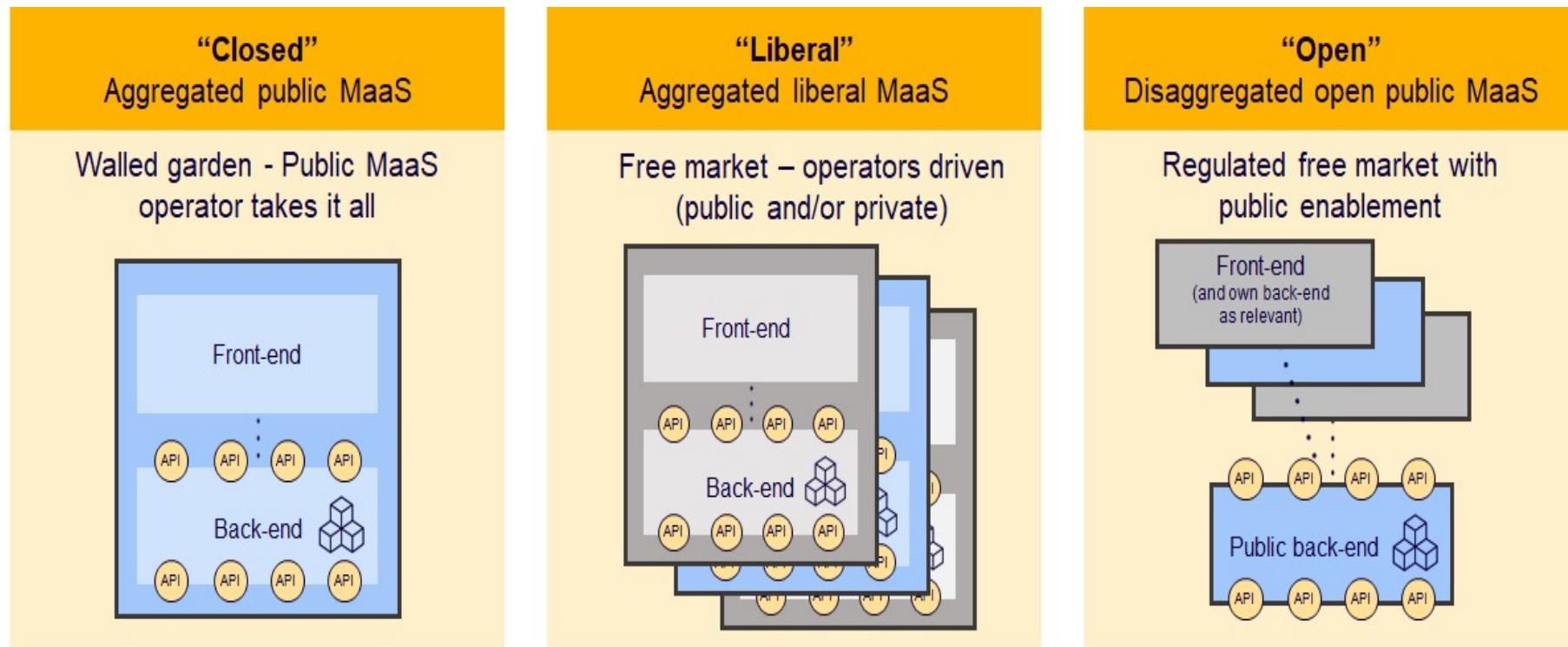
## MaaS topology (Sochor, Arby, Sarasini, Karlsson, Holmberg)



## 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

## 3 rätt bra exempel



- Publik MaaS
- Level 2
- Berlin
- Bästa app
- Störst utbud
- >100' användare
- Användande?



- Kommersiell MaaS
- Level 2,5
- Helsingfors + 5
- Bränt ca 70 m€
- Mest kända
- OK utbud
- 10' aktiva / månad



- Kommersiell MaaS
- Level 1/2
- Stockholm, Göteborg
- BoB-biljetter
- Del av Nobina
- Mest djuplänkningar
- 150' enkelbiljetter/må

## 2 bra kollektivtrafikbubblare



- "Liberal model"
- 3:e partsförsäljning
- BoB-biljetter
- 3-5% kommission
- 2 nivåer
- **Inte pilot**



STIB, Bryssel

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

## 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 framed by tall, mature trees with yellow and orange leaves. A paved sidewalk runs through the center, with fallen leaves scattered across it. Several people are walking away from the camera: two women in the foreground, a man further back, and another person crossing the street. In the background, there are buildings, traffic lights, and a blue bus stop. The overall atmosphere is a typical urban autumn 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!

32

