

Guidelines for the development of MaaS services in Italy

July 2021

Executive Summary

Mobility as a Service plays an increasingly important role in national and international debates because it concerns the future of our mobility. A digital future, simple, accessible and multimodal, which will allow users to move more easily and plan their trips directly from a mobile app, which will allow them to perform all the operations: from choosing the best route to checking the availability of vehicles, booking them, paying for the entire route, consulting their movements, for a new and complete "mobility experience".

MaaS consists of a new concept of mobility, which provides for the integration of multiple public and private transport services into a single service, accessible via smartphone, thanks to a platform with multiple functions and a single payment system, capable of responding in a way customized to all specific mobility needs and able to offer a real alternative to a private car. All in one app. As defined by the MaaS Alliance, the key concept behind MaaS is *"putting users [...] at the heart of transport services, offering tailor-made mobility solutions based on their individual needs. This means that, for the first time, easy access to the most appropriate mode or service of transport is included within a package of flexible travel service options and addressed directly to the end user"*. Mobility will therefore be called upon to make a transformation to adapt to the evolution of other digital services and the needs of users and, as has already happened in the past for video or music, it will become a digital, personalized and on demand service - always available, where you want and when you want.

Mobility as a Service is perhaps the greatest challenge for the future of our mobility, but it is a long path that involves all the players in the mobility ecosystem: transport operators, technology suppliers, digital operators, Public Administration, citizens, and many more. The first MaaS experiences that have already been launched, in Italy but above all abroad, have allowed us to study in depth the positive aspects and areas for improvement, and this knowledge has proved to be fundamental to direct the analyzes and conclusions of our document. Today we know that our goal must be to accompany the development and diffusion of MaaS services according to models of open ecosystems, which favor innovation in the mobility sector, in a free market and without monopoly conditions, for the benefit of citizens and of the environment. A truly functioning MaaS ecosystem can in fact generate benefits for all those involved in the mobility ecosystem:

- for citizens, who can access new MaaS digital services for every travel need, making more informed, multimodal and sustainable mobility choices, perceiving a value comparable to a private car;
- for MaaS, transport and mobility economic operators, thanks to a system of clear rules, which lowers entry barriers and favors the development of the market according to the principles of competition and non-discrimination, avoiding monopoly conditions;
- for the Public Administration, which is able to govern the mobility of its territory, accompanying the MaaS transformation to collect data, optimize the use of resources, define and implement policies to encourage increasingly sustainable mobility, achieving benefits for the entire collectivity.

The ability of our country system to implement new methods of sharing and collaboration between all current and future mobility stakeholders and an active role of public governance, both at the level of the Central Government

and at the level of local authorities (regions, metropolitan cities, mobility agencies or public companies) to orchestrate and enable the diffusion of MaaS services in their communities, balancing the market in the interest of the common good, will be decisive factors in achieving this ambitious goal.

The document "**The guidelines for the development of MaaS services in Italy**" intends to address all the aspects that will characterize the MaaS phenomenon and is organized in five sections:

1. **Introduction to MaaS.** The new concept of Mobility as a Service is introduced in a complete way, addressing an analysis of the main aspects that characterize the state of the art of knowledge on MaaS, from ecosystem models, to levels of integration, to international experiences, to the dimension of market, etc.
2. **MaaS and Business.** The business prospects of MaaS are manifold. The MaaS will entail a radical change in the relationships between all those involved in the MaaS ecosystem, from collective transport operators to new sharing mobility service providers, from suppliers of digital solutions and services to new players specialized in MaaS (MaaS Integrator and MaaS Operator), from the Public Administration to citizens and end users, who will consolidate according to new value chains and new business models. The offers of MaaS digital services will be customized on the basis of the needs of the specific target users to whom they will be addressed, to satisfy their mobility needs in a simpler, more immediate and multimodal way, and will evolve over time, to create the conditions for new business opportunities, enabled by a full digitalization of mobility.
3. **MaaS and Governance.** The value of public-private collaboration, and in particular the role of public governance, is a key factor in favoring the development and dissemination of new MaaS digital services that are able to keep the objectives of benefits for users aligned, for market operators, for the environment and for the entire community. The MaaS ecosystem can develop following 4 different models, characterized by a different role assumed by the public sector, each of which has positive and negative aspects. It seems of particular interest the possibility that the public plays the role of MaaS Integrator and enabler, and that private individuals play the roles of MaaS Operator, according to an open ecosystem model, in which the public orchestrates, creates the conditions to enable the MaaS market, and finally check that everyone moves in compliance with the rules.
4. **MaaS and Technology.** The creation of MaaS platforms will contribute to increase the drive towards the digitalization of services provided by individual transport and mobility operators in Italy, starting with local public transport. The digitalization of transport services is the necessary condition to be able to aggregate the offers within the MaaS platforms, starting from the integration of existing ITS systems and data, according to standard protocols and interoperable architectures between the transport layers, of MaaS Integration and by MaaS Operation.
5. **The European regulatory context.** This section presents an analysis of the main policy and regulatory initiatives, initiated by the most virtuous European administrations, at national or local level, for the definition of a system of rules favorable to the creation of a MaaS ecosystem. All the initiatives considered support an approach of greater openness and sharing of data relating to mobility and pricing, with the aim of encouraging and regulating the development of MaaS, ensuring fair competition, non-discrimination and

market opening. Some administrations have already launched initiatives for the definition of the rules for the creation of the MaaS ecosystem at a national level, such as Finland, France, the United Kingdom and the Netherlands, while there are also some policy initiatives at the local level, as in the case of Vienna, Ile de France and Piedmont region in Italy.

Mobility as a Service will therefore constitute a phenomenon of strong digital transformation for the mobility of all of us, which will become increasingly “on demand”. And, if accompanied by appropriate public policies, the MaaS will be an incredible opportunity for public mobility governance to encourage a modal shift towards more sustainable modes of transport.

In conclusion, the Document proposes **12 Recommendations** that can favor the development and dissemination of MaaS services in Italy, capable of generating benefits for citizens, for the business world, for the environment and for the community:

1. **Trust:** Encourage the involvement of all interested stakeholders, dialogue between the public and private sectors, the spread of a climate of trust and collaboration to build together the MaaS ecosystem of the future.
2. **Openness:** Promote the development and dissemination of MaaS services according to models of open ecosystems, which favor innovation in the mobility sector, in a free market and without monopoly conditions.
3. **Market:** Ensure access to the MaaS service market for all interested economic operators, be they transport and mobility operators, operators from other sectors or the digital economy, on equal terms and without discrimination.
4. **Freedom of choice:** Promote the dissemination of the largest number of MaaS services for all possible target users, to the advantage of their freedom of choice and with the aim of increasing the quality of the individual MaaS services offered.
5. **Public Governance:** Promote an active role on the local authorities (regions, metropolitan cities, mobility agencies or public companies) to enable the dissemination of MaaS services, balancing the market in the interest of the common good, also through the definition of guidelines for SUMP and the creation of hubs and local platforms enabling MaaS services.
6. **Sharing:** Promote the sharing of data on the use of transport and user mobility services by MaaS platforms to public administrations, in order to support the governance actions of the mobility of public entities.
7. **Public transport:** Encourage the digitization of payment systems for LPT services, the spread of flexible and demand-based services and the development of MaaS services also by LPT operators, provided that the data is open and accessible also to other MaaS platforms under the free regime competition.
8. **Multimodality:** Promote the integration into MaaS services of the largest number of transport and mobility services (collective, shared, individual, public and commercial), with a view to sustainable and multimodal mobility, in compliance with the principles of neutrality, accessibility, non-discrimination.

9. **Data:** Promote the opening of data by the operators of individual transport and mobility services (public and private), through the provision of documented interfaces (API), in order to make them accessible to MaaS operators.
10. **Interoperability:** Promote the interoperability of MaaS services at national level between the different local mobility systems, through the pooling of data and services by MaaS operators.
11. **Support to demand:** Promote the stimulation of the mobility demand of users who choose green and sustainable solutions through MaaS platforms, in addition to and/or in place of support for the offer of transport and mobility services, in the form of dedicated discounts , bonuses, cash backs or other initiatives, also in synergy with mobility management policies.
12. **Sustainability:** Promote the diffusion of MaaS services that can really constitute a digital meeting point between demand and supply of mobility, capable of generating benefits for the community and for sustainability, keeping the objectives of economic operators, citizens and public administration aligned.