Deliverable Proof – Reports resulting from the finalisation of a project task, work package, project stage, project as a whole - EIT-BP2020

Name of KIC project the report results from that contributed to/ resulted in the deliverable	Sustainable Shared Mobility (SuSMo)
Name of report	Co-creation of transition guidance tools private sector engagement report
Summary/brief description of report	A report on the activities from Cenex and Trivector to research and develop transition guidance resources in order to improve collaborative working and private/public partnerships.
Date of report	Dec 2020

Supporting Documents: attach in pdf format

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1. Executive Summary

Shared sustainable mobility has the potential to support the decarbonisation of the transport system. As part of the SuSMo project we are developing guidance and training materials that will support change agents in making the shift towards shared sustainable mobility. Research identified the following areas for further work:

- Behaviour change - how to make car usage less attractive.
- Collaboration between the private and public sectors.
- Policy regulation and procurement – development of strategic policy platforms.
- Using data to understand the social and environmental impacts.

A challenge was identified that in order to improve private sector engagement and collaboration there was a need to bring different actors together and explore a shared vision. To do this the project partners needed a deeper understanding of what the key elements in partnership are working are. In order to address this the project team undertook stakeholder engagement with private sector shared mobility operators and looked at outputs from previous research with municipalities.

Key factors in good partnership working identified from this research were:

1. **Financial viability of the tender and/or funding support. Easy to navigate procurement processes with realistic timings.**
2. **Enthusiasm (from the municipal authority) and good knowledge of shared mobility.**
3. **Evidence-based and comprehensive strategic thinking and policies.**
4. **Clear rules and regulations in place at a local level.**

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This report outlines a series of recommendations for shared mobility collaboration in order to deliver better, decarbonised and user centric services. Cities and operators should work to develop:

- **A sustainable transport vision for the city**
- **Procurement that works for both parties**

TRIVECTOR - STOCKHOLM

2. Introduction

The SuSMo Project (Sustainable Shared Mobility) aims to catalyse systemic change by instigating behaviour change, enabling connections and collaborations, and removing barriers through policy change. SuSMo brings together leading European municipalities with experts in the transport sector to provide decision-makers with tools and knowledge to maximise the benefits and mitigate the negative impacts of shared mobility modes. Funded by the Climate KIC (knowledge innovation community) it is catalysing system innovation in three main areas: behaviour change and building capacity, enabling connections, collaborations, and removing barriers through policy change and advocacy. SuSMo was launched in 2019 and has worked with city representatives and private sector shared mobility providers to establish the key needs and priorities for the effective deployment of sustainable shared mobility.

Research has identified the following areas for further work:

- Behaviour change - how to make car usage less attractive.
- Collaboration between the private and public sectors.
- Policy regulation and procurement – development of strategic policy platforms.
- Using data to understand the social and environmental impacts.

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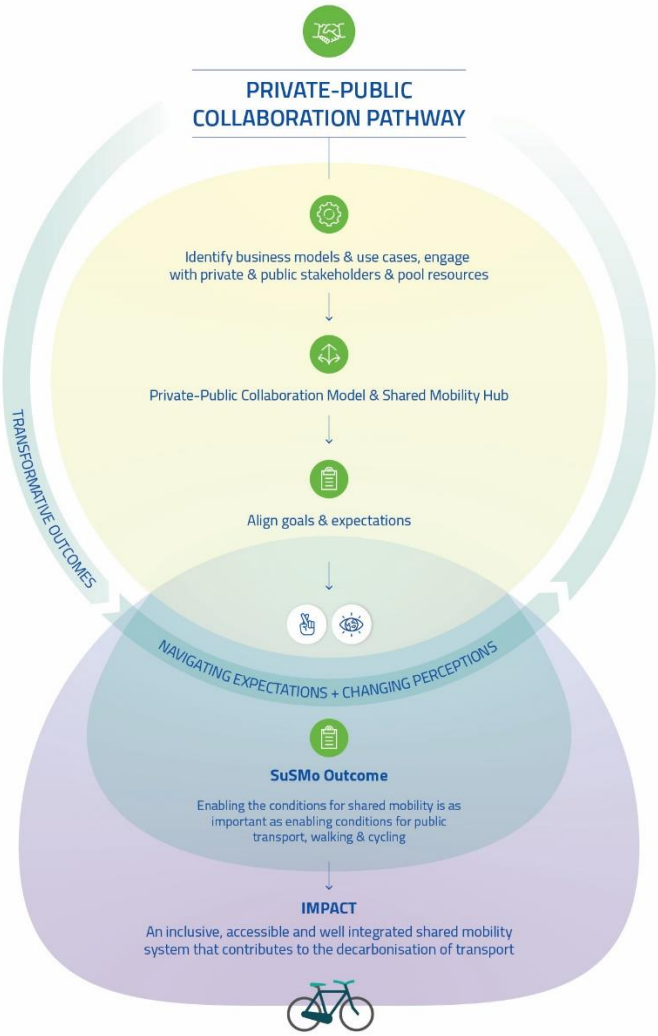

Figure 1 Theory of change - Private Sector

The SuSMo project is working with public and private sector representative to gain an understanding of different use cases helping to align goals and vision, to bring a change of perspective for those within the shared mobility system and help to manage expectations of the public and private sector. Ultimately this will enable the conditions for shared mobility to be well integrated into the transport system and result in decarbonisation.

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3. Private sector perspective and creating a shared vision

3.1 Background

The expansion of shared mobility modes has resulted in a growth in the industry of new and agile companies. These new mobility operators are quick to innovate and can deliver low carbon transport solutions. However, many of the incumbent processes for transport delivery are not well suited to the new system of multiple modes and providers.

Consultation with the SuSMo cities and outputs from our 2019 workshop on challenges and needs for shared mobility identified a desire from cities to make partnership working smoother, with all those involved having aligned goals and a shared vision. Collaboration between all sectors is key for successful shared mobility to flourish. For this element of the SuSMo project Cenex has been exploring the challenges and opportunities in partnership working between the private and public sectors. Taking key insights from shared mobility operators on how policy, regulation and procurement processes in cities can help or hinder the expansion of shared mobility modes.

Figure 2 Outputs from workshop 1: Challenges and needs

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3.2 Methodology

In order to gain insight into the private sector perspective on collaborative working we undertook semi-structured telephone interviews (copy of questions in Appendix A) with a variety of private sector operators, including car clubs/sharing, eScooter providers and moped providers. The purpose of the interviews was to:

- Learn about successful and unsuccessful examples of partnership working in order to understand the key factors that impact partnership working
- Gather information on the expectations for data requirements and sharing for operators.

We also distributed an online questionnaire to a wide range of shared mobility operators to gain further insight into factors that impact partnership working (see Appendix B).

It was important that all private sector operators that took part felt free to share their experiences without feeling that it could jeopardise any relationships with municipalities. Therefore, findings are kept anonymous and the full scripts are not shared in this report.

3.3 Summary of engagement

Taking the input from the interviews along with the feedback in the questionnaires we have summarised the key factors which facilitate good collaborative working and the implementation of sustainable, user centric shared mobility services. We have identified where possible some examples to learn from and possible routes to removing barriers and improving partnership development.

Financial viability of the tender and/or funding support. Easy to navigate procurement with realistic timings

Operators appreciate that the pace that the public sector moves at is different from the private sector. Both public and private sector concur that the decision-making process can be lengthy, partly due to the need for checks and balances to be in place to ensure the proper use of public funding. The length of time it takes from initial conversation to deployment can

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be quite difficult for operators to manage. It would be beneficial to both parties to start the discussion with confirmation of the processes and realistic timescales; this would help to manage expectations and allow the operator to plan future developments in line with the cities.

Cenex's report earlier in the year on eScooters recommended that municipalities take an active role in shared mobility provision. Without appropriate regulation eScooters have the potential to cause disruption to the transport network. The procurement of shared mobility service is a strong tool to allow cities to maximise benefits. However, a balance is needed to ensure that the tender process is not over-complicated and too restrictive. Some areas have this right, with light touch tender documents or memorandums of understanding. A good example is in Sofia, Bulgaria – the memorandum of understanding that allows eScooter companies to operate is concise and clearly states requirements placed upon the operator to comply with. Private operators report that are in some cases the restrictions and requirements make it very difficult for them to submit a viable application. Some examples are the requirement for a specific number of vehicles at certain locations, this is unhelpful and places a heavy burden on the operator to comply with. Others include stipulations on the provision of service in specific areas, often to address transport poverty or access to education and employment. All the providers are keen to work with municipalities to provide services that fit the need. They often feel, however, that they are being asked to shoulder some of the socioeconomic burdens of the city with very little support. Cities should seek to discuss proposals for the tender with industry representatives before launch to check that all operational requirements are sensible, and it is recommended that where municipalities want to guarantee a level of service beyond what may be profitable, they explore how they can support this. This could be via financial subsidies, commitment to provide communications support, or enforcement.

Local context is important for delivering transport. However, operators are keen to see the development of some universally applicable frameworks that can aid the procurement process. Cities should seek to learn from others and share examples of tender documents/procurement that have worked well for both parties. A good case study of this is

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in London – with 32 boroughs having different procurement mechanisms for car clubs, navigating this has been very difficult for the provider. However, by sharing an example of best practice between boroughs, they have been able to simplify approaches, and London Councils is now working on a unified tender specification for car clubs.

Shared mobility is a fast-moving area with innovations coming to the market all the time. Therefore, it is important to consider future trends and provide flexibility to accommodate these within the tender process. In the SuSMo project, previous engagement with municipalities discussed the danger of getting lost in the 'next new thing' was discussed. A balance is needed that includes adaptability but does not lose focus on current operations.

SuSMo – As part of the SuSMo project AESS are producing a shared mobility procurement framework, aimed at helping cities to navigate the process of tendering for shared mobility services. This will be available for cities in 2021. Cenex has also produced a set of shared mobility roadmaps that can aid cities to understand where technology is going and how the sector is developing. More information on this can be found at www.cenex.co.uk.

Enthusiasm (from the authority) and good knowledge on shared mobility.

Many cities and municipalities are announcing ambitious goals and programmes to reduce carbon emissions and the pace of change in transportation is fast. We are seeing an increasing awareness of shared mobility services and a desire to understand how these services can be implemented within a different local context. There does seem to be in some municipalities a knowledge gap, as officers and those at a higher level do not appreciate the intrinsically collaborative nature of shared mobility. Operators reported that their engagement process with cities often starts with an explanation of shared mobility and that these new modes should not be viewed as competing with mass and public transport. All evidence demonstrates that an integrated multi-modal transport system supports an increased used in all sustainable transport.

Municipalities must be responsible for creating low carbon transport systems that are desirable and people want. They can do this by setting the tone for their ambitions as a city, create an identity low carbon lifestyle for citizens. Shared mobility providers cannot convince

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the public to use low carbon transport on their own. Municipalities can build a clear picture of what shared mobility will mean and look like both for the city but also the individuals. This can help residents to understand how shared mobility can fit their needs.

The SuSMo project workshops and dissemination will be able to promote shared mobility to more cities. The behaviour change research will aid cities to understand better how they can develop shared mobility.

Evidence-based and comprehensive strategic thinking and policies.

The use of evidence-based strategic thinking and policies impacts the development of good tender/procurement. Evidence-based planning is needed to prevent requirements from municipalities being unrealistic. Where cities undertake strategic planning before going forward with procurement then they have a better foundation to propose realistic policies for the implementation of shared mobility.

Requests for regular KPIs are helpful for private operators as this allows them to understand what the priorities for the service are. KPIs should be based on realistic requests for data and both parties must have a good understanding of what is measured. The work that T U Delft have undertaken as part of the SuSMo project has highlighted the lack of a unified framework for impact evaluation. They are developing a tool to aid cities to understand how best to measure the impacts of shared mobility. Further information on the tool will be available to cities in 2021.

Clear rules and regulations in place at a local level.

All providers stated that a regulated environment is better for operations and partnership working. They do not want to see a free for all approach as this is detrimental to providing a good service and a successful business model. However, there was some frustration around reports of enforcement not being sufficient. Therefore, those who were adhering to the rules were not seeing the expected benefits. The providers were clear that poor practice is damaging to all and should be addressed. Cities must be clear from the beginning how they will review and address any issues. For example, a plan should be in place with clear channels of communication for dealing with vandalism of vehicles. Whilst it may be the public who

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mistreat or misuse the vehicles, the city and providers must be quick to address any problems.

This should be addressed in the procurement phase with input on how enforcement is maintained for the length of the agreement.

Figure 3 Output from the questionnaire: Impacts on partnership working

Other Factors As part of the interviews and questionnaire, some other factors where identified that may have relevance to the development of shared mobility in a city. These aspects are less within the cities' and operators' control as part of partnership development but may affect the viability of service delivery.

- **High Population density and favourable demographics:** Feedback from the interviews was that population density and demographics are important for successful schemes and profitability. However, operators stated that if the municipality offered a good tender and had the right strategy and a cooperative attitude then they would still be keen to explore what was feasible, even in less dense areas with unfavourable demographics.
- **Digital and physical connectivity to other modes of transport:** Good public transport and cycling/micromobility infrastructure in place makes a considerable difference to the ability for users to access shared mobility. It is recommended that cities should improve the physical infrastructure if they are keen on encouraging shared mobility. Digital connectivity

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and access to online travel information, booking and journey planning should be explored for future strategy development – if not part of a SUMP already.

- **The data sharing standards:** All operators we spoke to regarding data sharing are keen to see standards in place across countries and the EU. The private sector is keen to ensure the importance of GDPR and trust within the process.

3.4 Recommendations for collaborative working

- **Develop a sustainable transport vision for the city**
  - Present the benefits of an integrated transport system at all levels (decision-makers, procurement, incumbent transport providers)
  - Operators share experiences and evidence on benefits of shared mobility, working collaboratively to disseminate to cities.
  - Use current data and evidence to understand how shared mobility can impact the city. Municipalities need private operators to share data to do this.
  - Review SUMP and strategies to check they are in line with current trends and innovations. Operators should share how they intend to innovate and development of their services.

- **Procurement that works for both parties**
  - Use procurement framework sand be clear about the timeline from the start.
  - Talk to the market early.
  - Shared experiences of successful tenders with reach out to other cities/operators to learn from their experiences.
  - Define data sharing (content and mechanisms), Level of support (financial, communications, other), enforcement (both operators and users).

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4. Collaborative working private/public – car sharing in Stockholm

During the autumn 2020 an evaluation of existing car-sharing schemes connected to property development in Stockholm was carried out as part of the SuSMo-project[1]. The aim was to map the existing schemes and evaluate how key stakeholders have experienced the implementation and development of the services. Specific focus in the case study has been the relationship between the City of Stockholm, property developers, property owners and the car-sharing operators.

When establishing car-sharing schemes in connection to property development, there are mainly three phases that are important to have in mind. Dividing the establishment into these three phases makes it easier to create a good understanding of the preconditions that affect the future service.

1. Early planning phase
2. Operational and user phase
3. Monitoring and evaluation of data phase

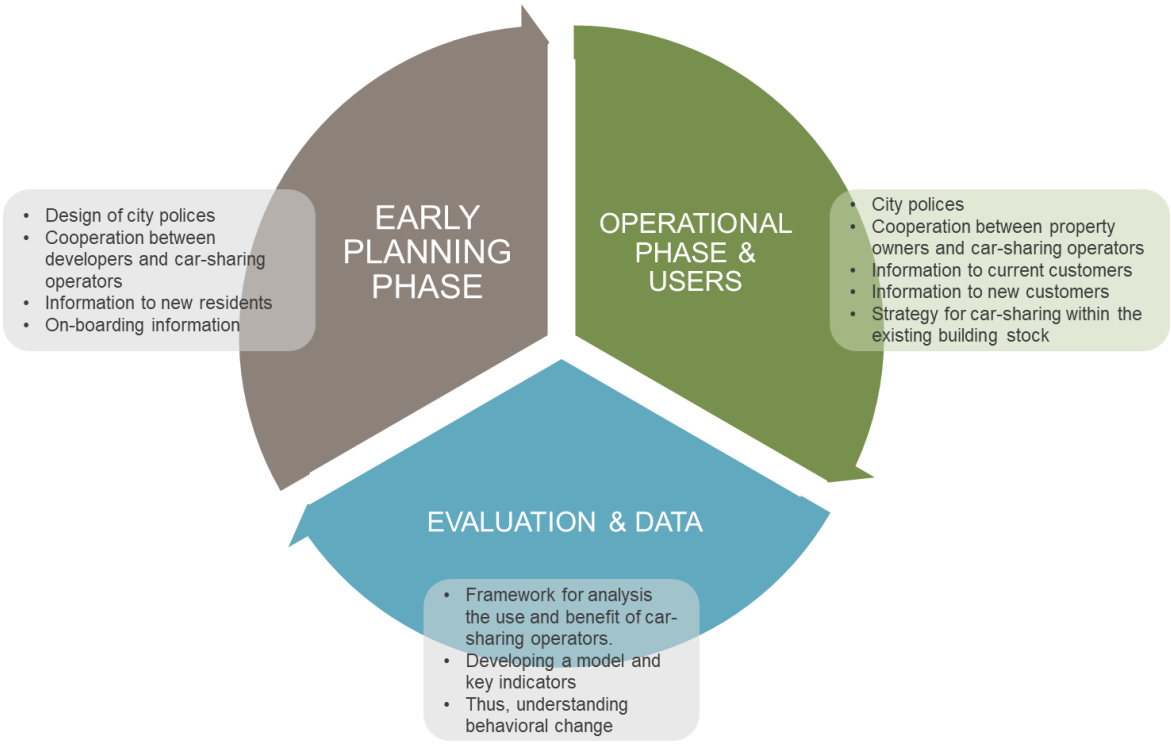

Figure 4 Framework for the establishment of car-sharing schemes in connection to property developments.

[1] Read more about the background to the study: Trivector, 2020. SuSMo_Behaviour change Reporting 2020.

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The result from the case study illustrates that the relationship between the stakeholders and the methods of collaboration are key aspects for developing successful car-sharing schemes in property development.

Lessoned learned and recommendations from the study in Stockholm

Cooperation with developers, property owners and car-sharing operator

A key learning from the early planning phase, when establishing a car-sharing services, is to involve car-sharing operators early in the process. In some projects the interest from the developer is less ambitious which also effects the possibilities to communicate the benefits of car-sharing, it might also lead to a missed opportunity to profile the project from a sustainability mobility perspective.

When the car-sharing service is in operation, the collaboration between the operator and the property owner is a key aspect. Often it is a tenant owner association-, municipal- or private property owner who takes over responsibility after the property developer and new ways of cooperation with the car-sharing operator must then be established.

Considering the results from the case study in Stockholm, three key recommendations are highlighted to develop the cooperation between private actors:

1. **Develop the ways of collaboration between developers and car-sharing operators, as well as developing common communication tools.**

A key for a successful car-sharing connected to property development is to communicate in early phase to the new residents, already during construction phase. In this phase the developer and car-sharing operator need to develop an integrated platform for communicating with residents. Important activities are also to conduct on-boarding campaigns in order to profile the project from a sustainable mobility perspective and to inform about the possibilities to use shared vehicles.

2. **Clear routines transferring responsibility of the car-sharing service from property developer to property owner.**

During the construction phase the developer is responsible for the communication and cooperation with the car-sharing operator. When the building is ready for the residents to move in the responsibility of the car sharing service is transferred from the developer to a property owner, in Sweden often to a tenant association. This association is often managed by the residents themselves with small or no experience of collaborating with car-sharing operators. In this context, the collaboration could be further strengthening and there is also a potential for developing support and guidelines for tenant associations on how to work with car-sharing services.

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3. **Property owners and car-sharing operators should find common tools for communicating to existing and potential customers.**

Currently some projects have a challenge to define which stakeholder that "owns" the right of communication to customers within a specific property. The property owner and car-sharing service could develop better tool for communication to increase the usage of the car-sharing services. In this context, many property developers are right now looking on how to implement digital platforms for communicating to potential new customers.

The role of the city administration and further policy improvements

The city of Stockholm has an important role to facilitate the process and to create a good collaboration between public and private actors. Considering the results from the case study in Stockholm, four key recommendations are addressed in order to improve city policy and collaborations models:

1. **City administration, developers and car-sharing operators need to develop better partnership agreements.**

In order to find a solid base for the collaboration between the stakeholders there is a need to develop better partnerships agreements. That would help all stakeholder to define and clarify roles and responsibilities in the operational phase as well as securing long-term relationship among the involved actors.

2. **A structed method for monitoring and evaluation of car-sharing projects.**

Without a regular monitoring of the extent of established car-sharing- or other vehicle services and how they are used, knowledge will never increase. The City administration should be responsible for developing a clear structure, which also will form the basis of which data the property owners and operators are required to share. With increased knowledge the agreements and requirements will be increasingly better.

3. **Potential to improve cooperation between car-sharing providers and other mobility services providers**

The cooperation between car-sharing operators and other mobility service providers could be developed. Integrated planning of car-sharing and mobility services through mobility hubs could further enhance the complete offer on sustainable mobility solution and reduce the need of privately owned cars.

4. **Adopt a strategy for shared mobility**

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It is recommended to, within the sustainable urban mobility plan or similar policy document, include a section of how shared mobility should be dealt with in the city and how shared mobility can help to accelerate the transition towards the climate goals.

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