

# Where is the journey going? A market check on mobility services

MaaS Market Check

# Enabling you to shape a better tomorrow

We create digital futures with sustainable impact for the world

MHP in Numbers



## Industry focus

- Mobility
- Manufacturing
- Logistics & Transportation

40%

of the top 100 German companies by turnover and over 50 global market leaders are our customers.

MHP has received several awards from customers and employees.



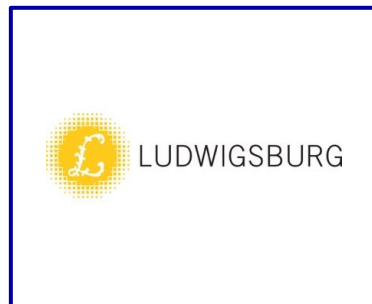
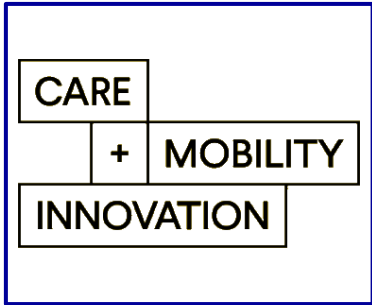
## Portfolio

### Digital Core & Technology

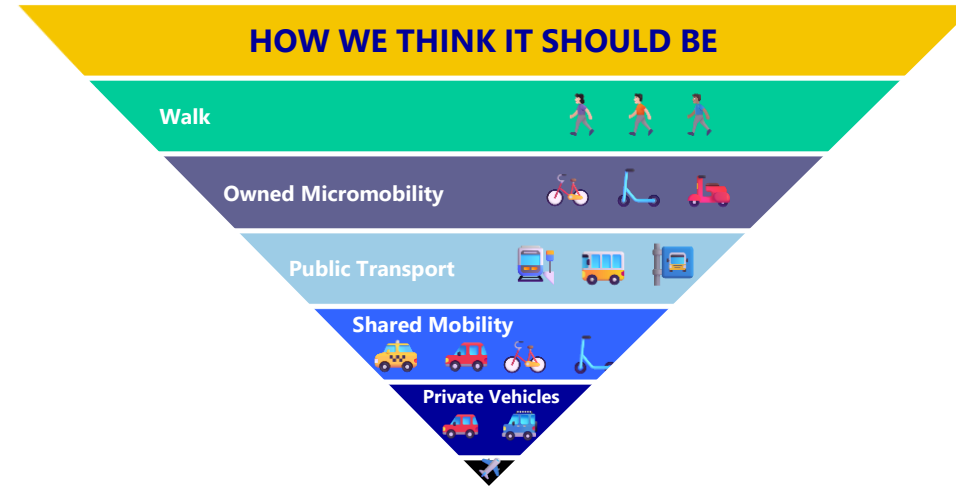
- Technology Strategy
- Business Platforms & Integration
- Software Defined Vehicle
- Data Architecture, Analytics & AI
- Cloud Native
- Cyber Security

As a technology and business partner, we digitizes our customers' processes and products and supports them in their IT transformations along the entire value chain.

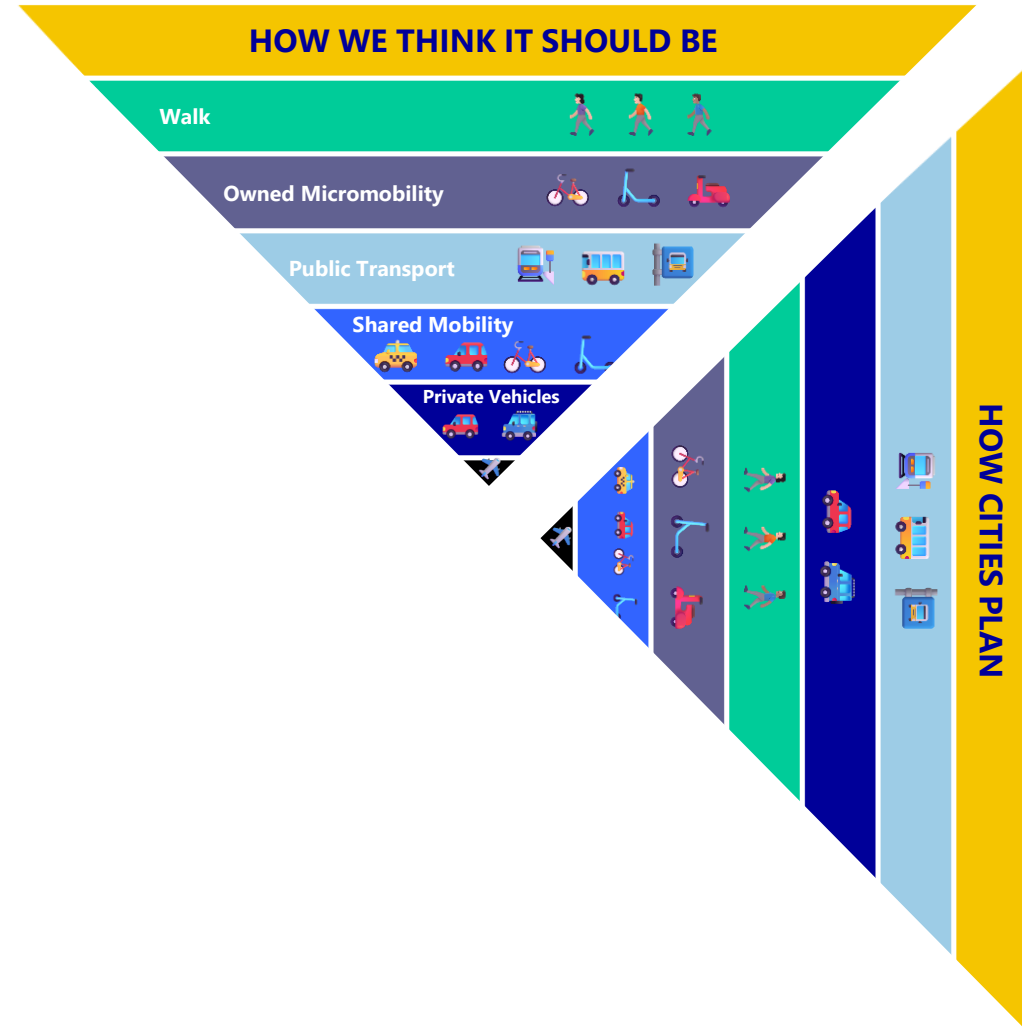
# MHP works with customers from industry and the public sector



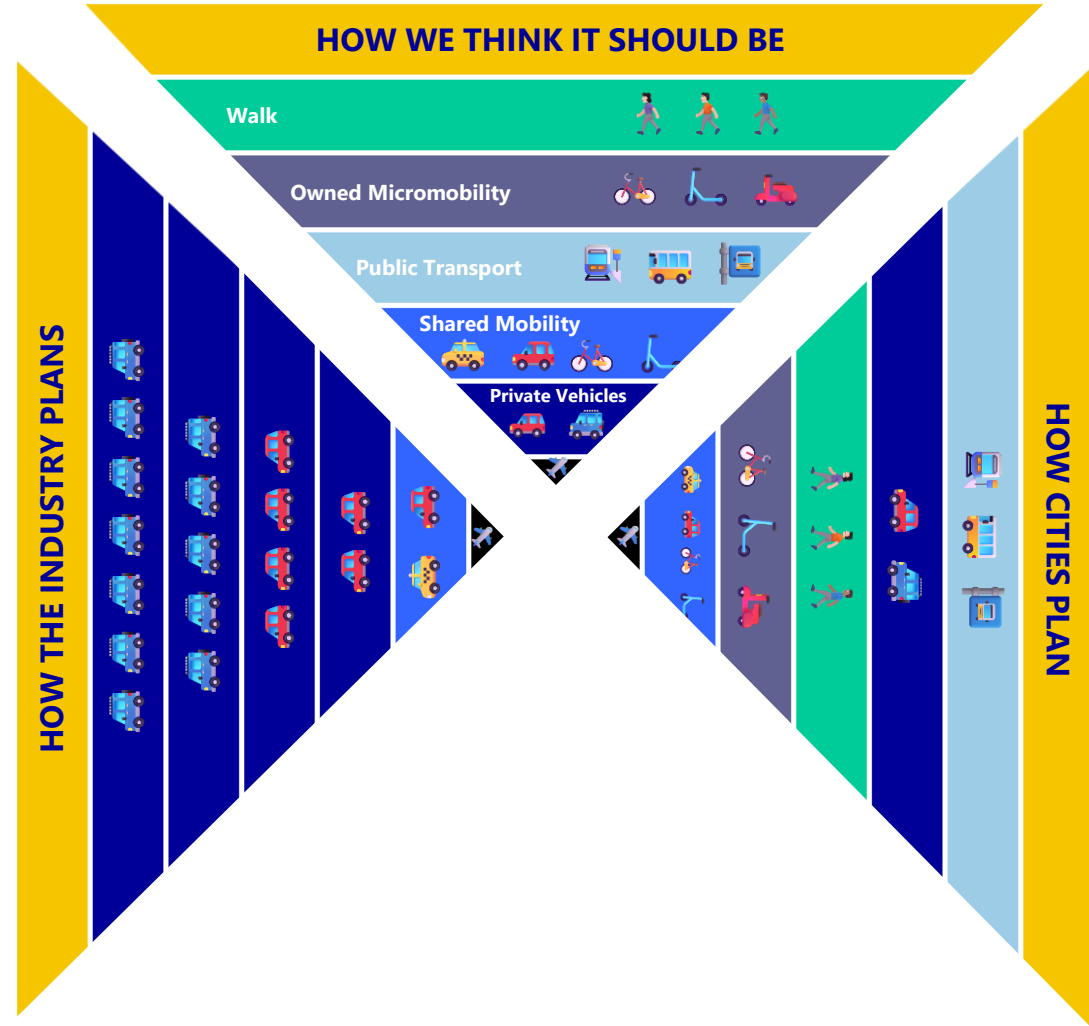
# Vision vs. Reality.



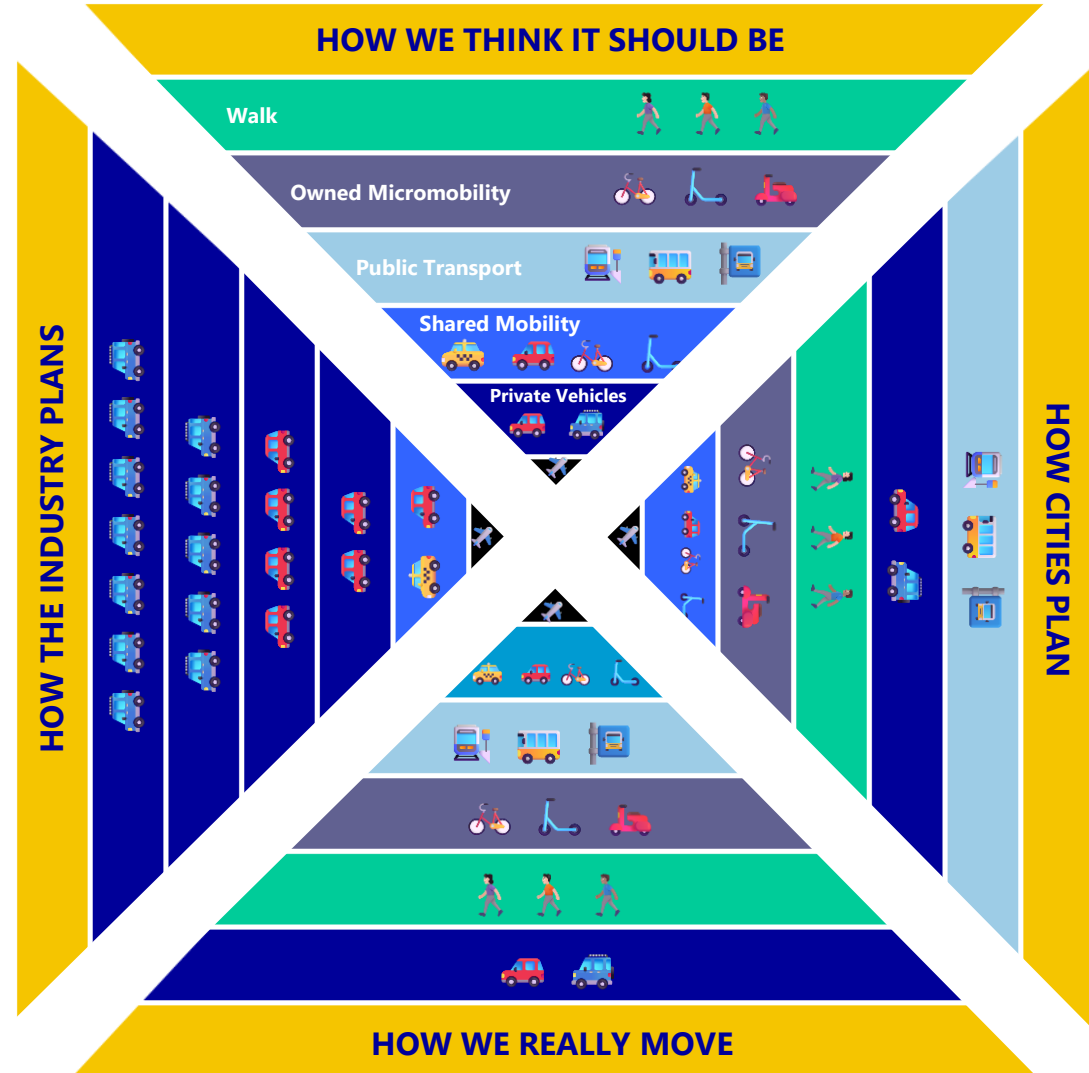
# Vision vs. Reality.



# Vision vs. Reality.



Vision vs. Reality.  
MaaS and shared mobility as a supplement, motorized individual transport still far more relevant.



# User survey: Use of sharing services in the next 5 years with a net negative effect.



**Net-positive effect: A higher proportion of respondents expect to use the means of transport more frequently.**

**Net-negative effect: A higher proportion of respondents expect to use the means of transport less.**

$$\text{Net-positive} = \frac{\text{More frequent use}}{\text{Less frequent use}} > 1$$

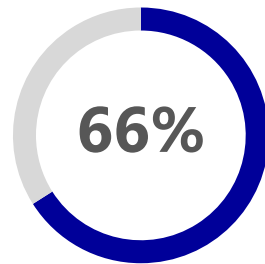
$$\text{Net-negative} = \frac{\text{More frequent use}}{\text{Less frequent use}} > 1$$

The use of personal cars and bicycles will increase, while sharing and on-demand services will decrease over the next five years.

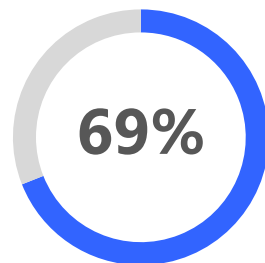


# User survey: Users want bundling of services.

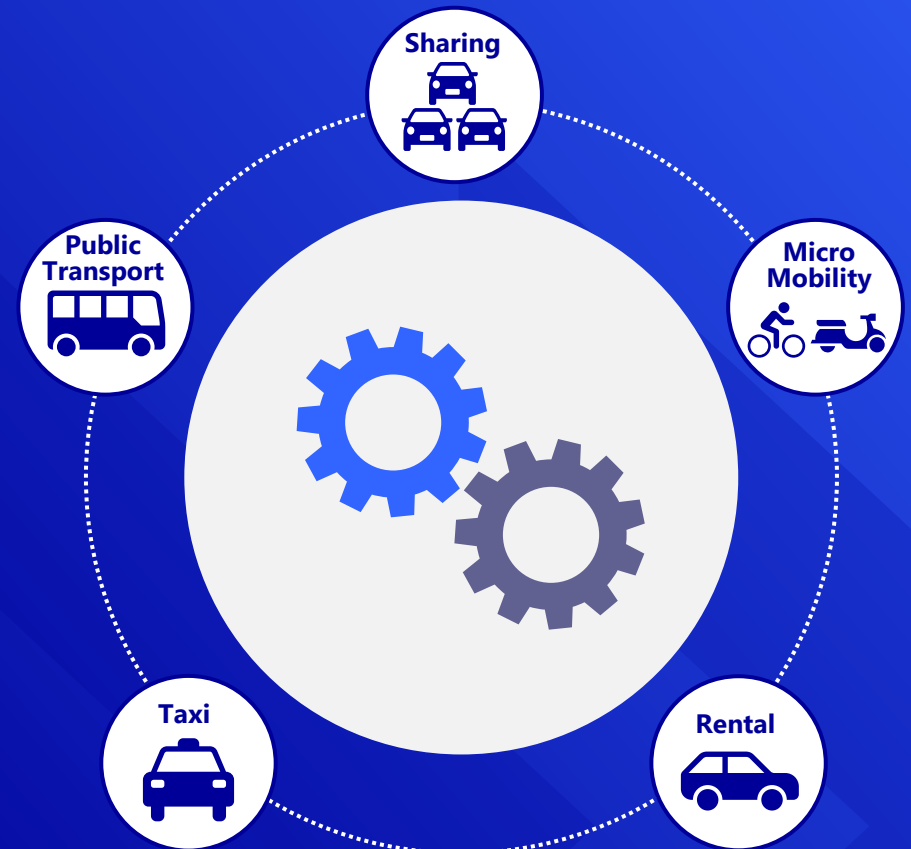
Urban Areas



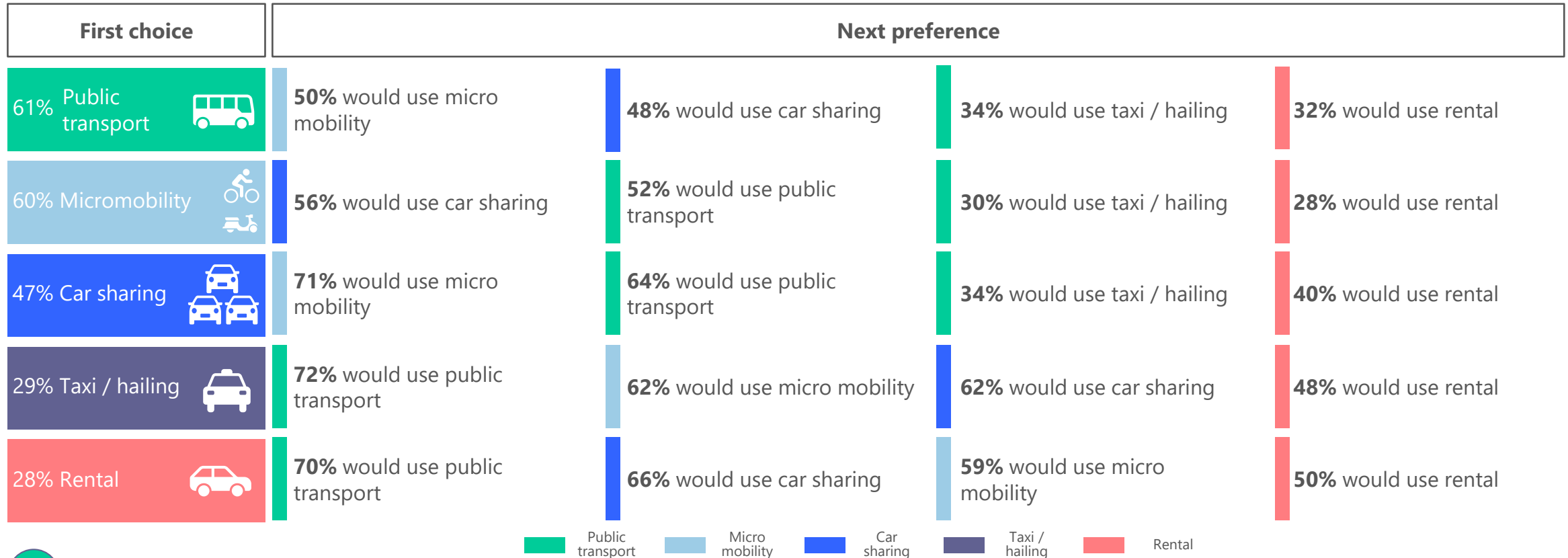
Suburban Areas



2 out of 3 respondents would prefer to **bundle** several services in **one MaaS app**.



# Local public transport is seen as the basis for multimodal concepts. Dogmas in relation to renting must be discarded.



**i** Public transportation is the anchor, followed by micromobility and car sharing  
Ride hailing / taxi is less relevant, car rental has a strong position.

*Note: Only respondents who were in favor of bundling services were included.*

# The race to a single app for mobility: Dynamic environment with manageable economic success.



Source: Augustin Friedel, LinkedIn

# MaaS in public transport at the example of Germany: Everything from the beginning and many build their own solution.

## Mobility Inside



- Complex organization and implementation resulted in termination of the initiative in 2024.

# MaaS in public transport at the example of Germany: Everything from the beginning and many build their own solution.

## Mobility Inside

## Lighthouse cities



- Complex organization and implementation resulted in termination of the initiative in 2024.
- Lighthouse projects in major cities as inspiration.

# MaaS in public transport in Germany: Everything from the beginning and many build their own solution.

## Mobility Inside



## Lighthouse cities



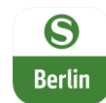
## Fragmentation in the area



- Complex organization and implementation resulted in termination of the initiative in 2024.
- Lighthouse projects in major cities as inspiration.
- Elaborate individual solutions in the area.

# Achieve critical mass: MaaS as a central customer platform instead of fragmentation of the app landscape.

## Example Berlin: More than 5 apps for public transport and MaaS information and booking



**S-Bahn Berlin**  
Deine Fahrplanskunft  
S-Bahn Berlin GmbH  
★★★★★ (4.2) Bewertungen  
Gratis



**VBB easy - Bus & Bahn einfach**  
GRVVR Fahrplan ohne Barrieren  
HalCon Ingenieurges. mbH  
★★★★★ (4.7) Bewertungen  
Gratis



**VBB Bus & Bahn: Routenplaner**  
HalCon Ingenieurges. mbH  
Nr. 128 in Berlin  
★★★★★ (4.9) Bewertungen  
Gratis



**BVG Jelbi: Get Around Berlin**  
Bus/train, taxi, e-scooter



**BVG Muva: Mobility for you**  
Connection to local transport



**BVG Fahrinfo: Routes & Tickets**  
Timetable, Routes & Tickets



**BVG Tickets: Train, Bus & Tram**  
Buy a ticket to travel Berlin



## Recommendation: Unification in one app



- Scatter loss of customers across a large number of apps
- Costs for further development and operation of the apps
- Complexity as a barrier to entry for new customers

- Advantages in marketing and customer development
- Cost reduction for the operation of digital platforms
- Increase user-friendliness
- Bundled reporting and derivation of measures

# Challenges in the business model:

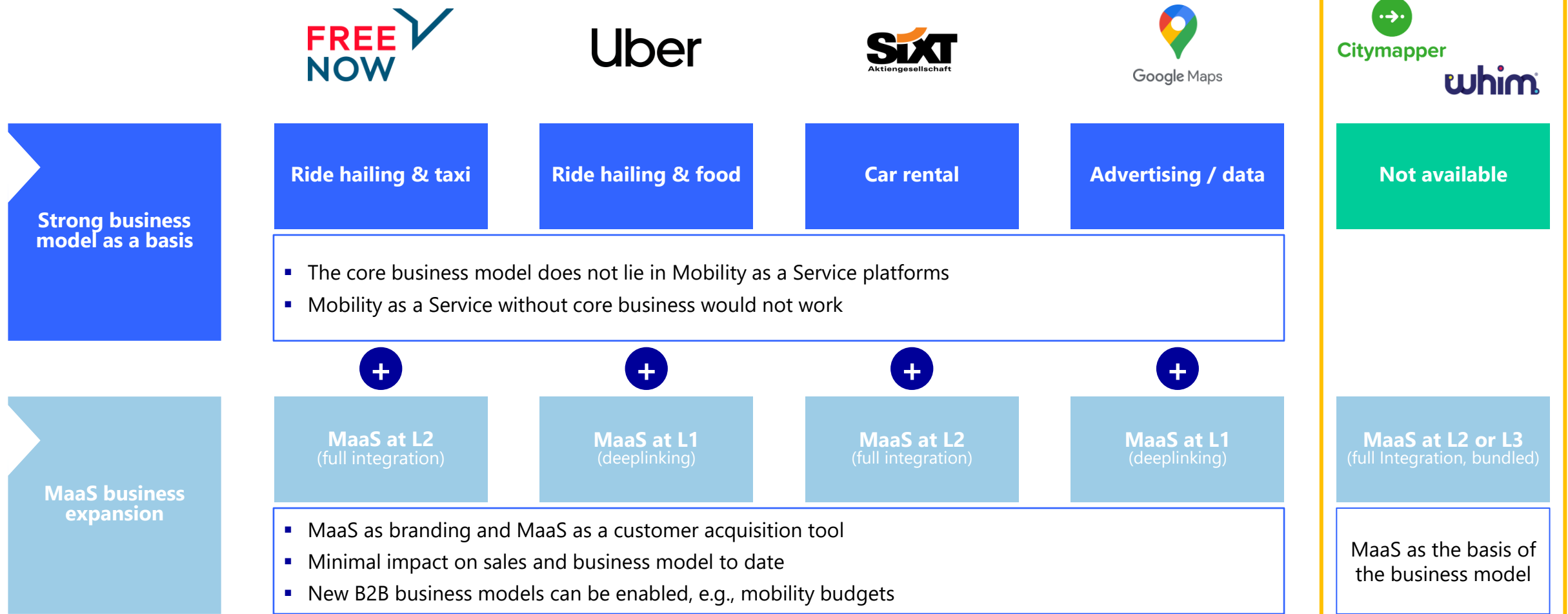
Business potential and utilization for the individual modes differ significantly.

	Possible internal sales per transaction	Frequency of use by customer	
Long-distance travel	\$\$\$	★☆☆☆☆	<b>Not integrated</b>
Car rental	\$\$\$\$	★☆☆☆☆	
Car sharing	\$	★☆☆☆☆	<b>Integrated, but difficult business model</b>
Hailing / taxi	\$\$	★☆☆☆☆	
Shared micro mobility	\$	★☆☆☆☆	
Public micro mobility	No monetary potential	★★☆☆☆	<b>Difficult business case, but high usage, therefore interest in integration</b>
Public transport	Low monetary potential	★★★★☆	
Charging	No monetary potential	★★★★☆	<b>Mostly not integrated, no business model</b>
Parking	No monetary potential	★★★★☆	





# Mobility as a Service as a stand-alone business model is not sustainable. Private providers build business on a strong foundation.



## Business models:

MaaS platform providers without additional revenue streams are rarely successful.

**Public transport projects**  
(research project / subsidized)



**MaaS as an on-top solution for existing business models**



**MaaS stand alone offers**



übernommen



Erst insolvent,  
dann  
übernommen

No independent business model required.  
Only represented locally

Cross-financed by core business

So far, **no sustainable business case**.  
Business models have not been successful



The different MaaS platforms pursue differentiated business models - public transport projects with a significant advantage: The business model is not the main focus.

## Focus on users, offer and business case required

1

- **Motorized individual transport remains relevant.**
- **Shared mobility use may lose relevance in the next 5 years.**
- **On-demand services & taxis most affected, car sharing least.**

## Focus on users, offer and business case required

**1**

- **Motorized individual transport remains relevant.**
- **Shared mobility use may lose relevance in the next 5 years.**
- **On-demand services & taxis most affected, car sharing least.**

**2**

- **Many providers want to win the MaaS market.**
- **Public transport providers with relevant advantages, opportunities must be exploited.**

## Focus on users, offer and business case required

**1**

- **Motorized individual transport remains relevant.**
- **Shared mobility use may lose relevance in the next 5 years.**
- **On-demand services & taxis most affected, car sharing least.**

**2**

- **Many providers want to win the MaaS market.**
- **Public transport providers with relevant advantages, opportunities must be exploited.**

**3**

- **MaaS business models remain a challenge.**
- **Further sales opportunities should be developed.**

# LET'S TAKE THE NEXT STEPS IN YOUR TRANSFORMATION TOGETHER



**We advise and support you in the design and digitalization of tomorrow's mobility and energy solutions.**



**AUGUSTIN FRIEDEL**

augustin.friedel@mhp.com  
+49 152 5524 9099  
[www.linkedin.com/in/friedel](http://www.linkedin.com/in/friedel)



## **MHP Management- und IT-Beratung GmbH**

Film- und Medienzentrum | Königsallee 49 | D-71638 Ludwigsburg  
Phone +49 (0)7141 7856-0 | Fax +49 (0)7141 7856-199  
eMail: [info@mhp.com](mailto:info@mhp.com) | Homepage: [www.mhp.com](http://www.mhp.com)