



# **GOVERNANCE AND NEW MOBILITY: GECKO WORKSHOP 3**

## **Shaping the Future**

REPORT ON GECKO STAKEHOLDER WORKSHOP 3  
ONLINE, 13-15 APRIL 2021

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Author: Bonnie Fenton, Rupprecht Consult



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## PROJECT PARTNERS

Organisation	Country	Abbreviation
UNION INTERNATIONALE DES TRANSPORTS PUBLICS	BE	UITP
FIT CONSULTING SRL	IT	FIT
UNIVERSITY COLLEGE LONDON	UK	UCL
POLIS - PROMOTION OF OPERATIONAL LINKS WITH INTEGRATED SERVICES, ASSOCIATION INTERNATIONALE	BE	POLIS
RUPPRECHT CONSULT - FORSCHUNG & BERATUNG GMBH	DE	RC
ABSISKEY	FR	CHT
ABO AKADEMI	FI	ÅÅ
CONFEDERATION OF ORGANISATIONS IN ROAD TRANSPORT ENFORCEMENT	BE	CORTE
UNIVERSITA COMMERCIALE LUIGI BOCCONI	IT	UB

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# 1. ABOUT GECKO

The rapid proliferation of new technologies and disruptive innovations are taking the world by storm, threatening well established players across many sectors. Regulators and decision-makers at different levels of government are overwhelmed by the challenge, acknowledging that existing frameworks may be inadequate in terms of protecting society, fostering business development and achieving integrated, sustainable mobility.

GECKO's main goal is to support authorities with tools and recommendations for new regulatory frameworks to lead the transition to the new mobility era of cooperative, inclusive, competitive, sustainable and interconnected mobility across all modes, through evidence-based research.

GECKO provides a holistic approach with innovative concepts, methodologies and forward-looking tools to enable this transition to take place, leading to new, adaptive and anticipatory regulatory schemes and balanced governance.

The project aims to build on the strong networks of its partners to ensure solutions are co-designed and validated. A number of key indicators and cooperation models will help to develop the Regulatory Frameworks Dashboard, through which the maturity of given regulations can be judged with respect to emerging mobility solutions.

GECKO will outline an implementation plan including actions required up to 2040 for policy makers to devise regulatory approaches for disruptive innovations and new regulatory frameworks streamlining uptake. GECKO will advise policy makers on challenges and policies that need to be addressed to move towards integrated, accessible and sustainable mobility across modes for both passenger and freight transport.

The project will provide recommendations to policy makers to enable adaptive and anticipatory regulatory schemes and governance with novel policies that contribute to sustainable mobility goals.

## 2. OBJECTIVES OF THE STAKEHOLDER ENGAGEMENT PROCESS

The objectives of the stakeholder engagement work package, WP5, are to:

- start up and stimulate debate on impacts of business and operating models on regulatory schemes at EU28 and International (Japan, US, Singapore and China) debate among relevant stakeholders (WP2)
- establish and manage a bottom-up consultation process, organise and facilitate effective and meaningful conversations at multi-stakeholder level in 3 thematic working groups on automation and emerging technologies; shared mobility/public transport/Mobility as a Service and digitalisation and data-driven models;
- get input on experience, lessons and practices on technological, social, economic, political drivers and barriers affecting the forthcoming deployment of innovative business models and technologies (WP1 and 2);
- report strategic outlook to set up policy recommendations and roadmap on joint and co-actions addressing societal, economic and political aspects both EU and global strategic agenda and device new regulatory framework and governance in innovative mobility (WP4)

Through WP5, GECKO organises, conducts and analyses the results of an intensive stakeholder engagement process to ensure that the vision, views, challenges, constraints, expectations and ideas of stakeholders are understood and can inform not only future regulations but – more importantly – the foundational principles of future regulation making processes.

One of the key principles in the stakeholder process is an open give and take among all participants. Stakeholders understand that their on-the-ground experience and their expertise are valuable to the GECKO project. Likewise, the project is able to a) bring new insights to stakeholders through its research, data collection and analysis and b) connect stakeholders with one another so that they can also better understand the needs of actors in other areas of new mobility.

### 3.OBJECTIVES OF WORKSHOP 3

Directly relate to the work currently being done by the project partnership, Workshop 3 was focussed specifically on obtaining input from new mobility stakeholders on:

- What new governance models could or should look like, acknowledging the conflicting needs and interests of the public and private sectors
- Understanding the regulation-related barriers to achieving a sustainable mobility future, looking at timeline up to 2040
- The role of the European Commission and decision makers at other levels with regard to changes in governance structures and regulatory frameworks to facilitate positive change in mobility while discouraging change that doesn't lead to a sustainable and equitable future

Some of this input was gathered through a pre-workshop questionnaire. The results were shared with participating stakeholders via on online whiteboards and served as a basis for the discussions in the sessions on looking ahead to 2040 and the recommendations sessions.

## 4. WORKSHOP PARTICIPANTS

The aim was to have roughly 30 stakeholders attend each of the three planned workshops throughout the lifetime of GECKO.

A representative group of 15 “core” stakeholders was selected at the outset to attend all three workshops. This was intended to provide a certain continuity across all workshops. This group represents the geographic areas of Europe (Northwest Europe, Central Europe/ Baltic states, Eastern Europe/ Balkan states, Southern Europe/ Mediterranean, Nordic countries) and beyond, and all three sectors of stakeholder (public – at all levels of government, private – in a range of industries, and other influencers) with a stake in the fields being examined by the project: 1) automation and emerging technologies; 2) shared mobility, public transport and Mobility as a Service and 3) digitalisation and data-driven models. A gender balance was also achieved.

The other 15 invitees were part of the “flex” group, i.e., 15 different people will be invited to each workshop. This was done so as to combine continuity with fresh perspectives at each workshop and to allow us to focus invitations on particular topics areas, backgrounds or mobility areas as dictated by the stakeholder input needed at the given stage of the project.

As with stakeholder Workshop 2, Workshop 3, was held online due to the ongoing pandemic. Selected stakeholders were invited to one or more in a series of online focus group discussions. Taking advantage of the removal of the barrier of travel costs, a larger circle of attendees was invited to individual sessions based on their interest and expertise. Using the online format, we were able to include 39 stakeholders (plus consortium members) in the various online sessions.

See ANNEX 3: WORKSHOP ATTENDEES for a complete list of workshop attendees.

## 5. PRE-WORKSHOP QUESTIONNAIRE

A pre-workshop online questionnaire was sent out to all GECKO stakeholders several weeks in advance of the workshop. The questions were designed to gather stakeholder input which is difficult to come by otherwise and to feed and complement the discussions planned for the workshop itself.

The pre-workshop questions were developed by a group of project partners with the specific goal of gathering input needed input for the project at its current stage. The specific areas of interest in this survey were positions and policy statements around the regulation and governance of new mobility, prioritisation of the challenges to regulating new mobility and Covid-19 and the governance of new mobility. Responses to the Covid-related questions fed into an academic paper being written by some project partners on this topic.

50 surveys were submitted, of which 43 were complete and valid. See ANNEX 4: PRE-WORKSHOP QUESTIONNAIRE QUESTIONS for the complete list of questions.

## 6. WORKSHOP ACTIVITIES

The format and activities of the stakeholder dialogue were developed for an online format. Activities were spread over three days and focussed invitations were made to individuals to specific 60 or 90-minute sessions based on their interests and expertise. A total of six sessions were held:

- A session on conflicting interests between the public and the private sector and how these can be overcome (offered twice to allow for both Asian and North American participation)
- A session on looking ahead to 2040 and the steps needed to reach the envisioned scenario (offered twice to allow for both Asian and North American participation)
- A recommendations session
- A plenary at the end in which the outcomes of the other sessions were shared with all

See an overview of all sessions in Table 1.

*Table 1: Overview of workshop sessions*

<b>Tuesday, 13.04.2021</b>	<b>10:00-11:30 CEST</b>	<b>Conflicting interests, session 1</b>
<b>Tuesday, 13.04.2021</b>	15:30-17:00 CEST	Conflicting interests, session 2
<b>Wednesday, 14.04.2021</b>	10:00-11:30 CEST	Looking ahead to 2040, session 1
<b>Wednesday, 14.04.2021</b>	15:30-17:00 CEST	Looking ahead to 2040, session 2
<b>Thursday, 15.04.2021</b>	10:00-11:30 CEST	Recommendations
<b>Thursday, 15.04.2021</b>	16:00-17:00 CEST	Summary

Activities were planned to provide a balance of “give” and “take” with the stakeholders, covering the topic areas as described under OBJECTIVES OF WORKSHOP 3. In this online format, the “giving” portions of the workshop took place through GECKO project presentations in each of the sessions. See Table 2:

*Table 2: GECKO project input at stakeholder workshop 3*

<b>Session</b>	<b>GECKO input</b>
<b>Conflicting interests</b>	Overview of new mobility services and business models (D1.4)
<b>Looking ahead to 2040</b>	GECKO new mobility regulation map (D3.3)
<b>Recommendations</b>	Analysis of regulations and governance models (D2.4)
<b>Wrap-up</b>	The session was made up of sharing input from the rest of the week’s sessions

In exchange, the project requested of participants:

1. completion of the pre-workshop questionnaire to provide input to project data needs
2. active participation in one or more workshop sessions (with related online whiteboard)

## 6.1 Conflicting interests (sessions 1 and 2, 13 April)

### GECKO input

Sessions 1 and 2 looked at conflicting (and also converging) interests between the public and the private sectors. Each of the two sessions began with project input. This included new mobility services and technologies reviewed by GECKO, business models for different new mobility services and technologies and a series of changes in regulations or governance structures and the challenges these can present for private sector providers of new mobility services or technologies (see Figure 1).

# Regulatory Changes (support) and Challenges from Previous Workshop Findings

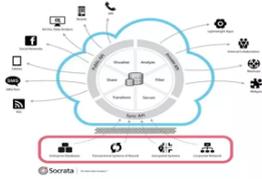
<p><b>Changes and support</b></p>	 <p><b>Top down approach</b></p>	 <p><b>Public education</b></p>	 <p><b>Stronger public-private partnership (PPP) Model</b></p>
<p><b>Challenges</b></p>	<p>How to deal with top down approach for disruptively innovative mobility firms?</p>	<p>Persuade people to adopt new mobility services and technologies for environmental reasons is not always an effective way. (where is economic benefits).</p>	<p>The city needs to make sure the collaboration is profitable and sustainable.</p> <p>The public/private dialogue is region-specific, it's a city to city approach. Should there be a standard for this collaboration.</p>
<p><b>Changes and support</b></p>	 <p><b>B2G data platform</b></p>	 <p><b>B2G agreement (contract)</b></p>	 <p><b>Transparent and well-established data policies</b></p>
<p><b>Challenges</b></p>	<p>The lack of capacity for cities and PTOs to use the data. How to deal with data sharing and APIs issues?</p>	<p>More negotiation is needed if government adopts a top down approach (e.g., service level agreements between private/public - who has the liability to provide the coverage in remote areas).</p>	<p>Data standard, APIs, and other policies are difficult to be consistent especially given the nature of data variety.</p>
<p><b>Changes and support</b></p>	 <p><b>Urban space</b></p>	 <p><b>Subsidies for peripheral transportation</b></p>	 <p><b>Assessment of the environmental footprint</b></p>
<p><b>Challenges</b></p>	<p>Why would municipalities provide spaces for business that make money? The private sector needs to prove the benefit for the municipality.</p>	<p>New players and innovators need to prove the contribution to the city objectives, benefits for the local community in order to receive support, possible subsidies, etc.</p>	<p>Need to "charge" the environmental impact.</p> <p>What are standards for environmental footprint across cities/regions?</p>



Figure 1: Regulatory changes and the challenge that each could imply to the public sector

## Stakeholder input

Two conflicting interest sessions were held. The same format and white board template were used for both sessions. The two sessions allowed us to invite more stakeholders and to allow participation from both Asia and North America. The questions were developed in collaboration with, and the topic was introduced by, GECKO colleagues from Polis, who are responsible for the deliverable Guidance for New Governance Models. Invited stakeholders represented the public and the private sectors as these are the sectors where conflicting interests have been identified throughout the project.

The topic was divided into four sections to allow for more focussed discussion. See Table 3.

*Table 3: Discussion topics and descriptions for the Conflicting Interests session*

<b>Transport justice and social inclusion</b>	<b>Away from the city centre, many suburbanites are either locked into car-dependency (and highly sensitive to restrictions), or captive users of public transport (who dream of buying a car). Accelerating the shift to sustainable mobility requires providing these populations with affordable options.</b>
<b>Fair labour practices</b>	Some new mobility services, created by highly qualified tech professionals, with generous pay and benefits, are generating thousands of low-pay, no-benefit, “individual entrepreneurs”. The externalisation of labour costs provides a competitive advantage – but who deals with the side-effects?
<b>Protecting and serving the backbone (public transport)</b>	Mass Public Transport carries large numbers of passengers, has deep influence in land-use, and (as became evident throughout the pandemic) is what keeps running, when crisis comes. It is the backbone of the urban mobility system – but it has its limitations, regarding capillarity and off-peak periods.
<b>Encourage active mobility</b>	Walking is the most environment-friendly mode of transport, with cycling a close second. We need to reduce transport carbon emissions, but in our sedentary society we also need more active mobility, to improve physical and mental health.

Each topic offered space to provide input and views on:

- Converging interests between public and the private sector interests
- Conflicting interests between public and the private sector interests
- Advice for those developing the new governance models

Stakeholder feedback was captured on an online white board (one for each group) (see Figure 2 and Figure 3). The main points were then summarised to be shared with all participants in workshop session 6 (see Figure 4).

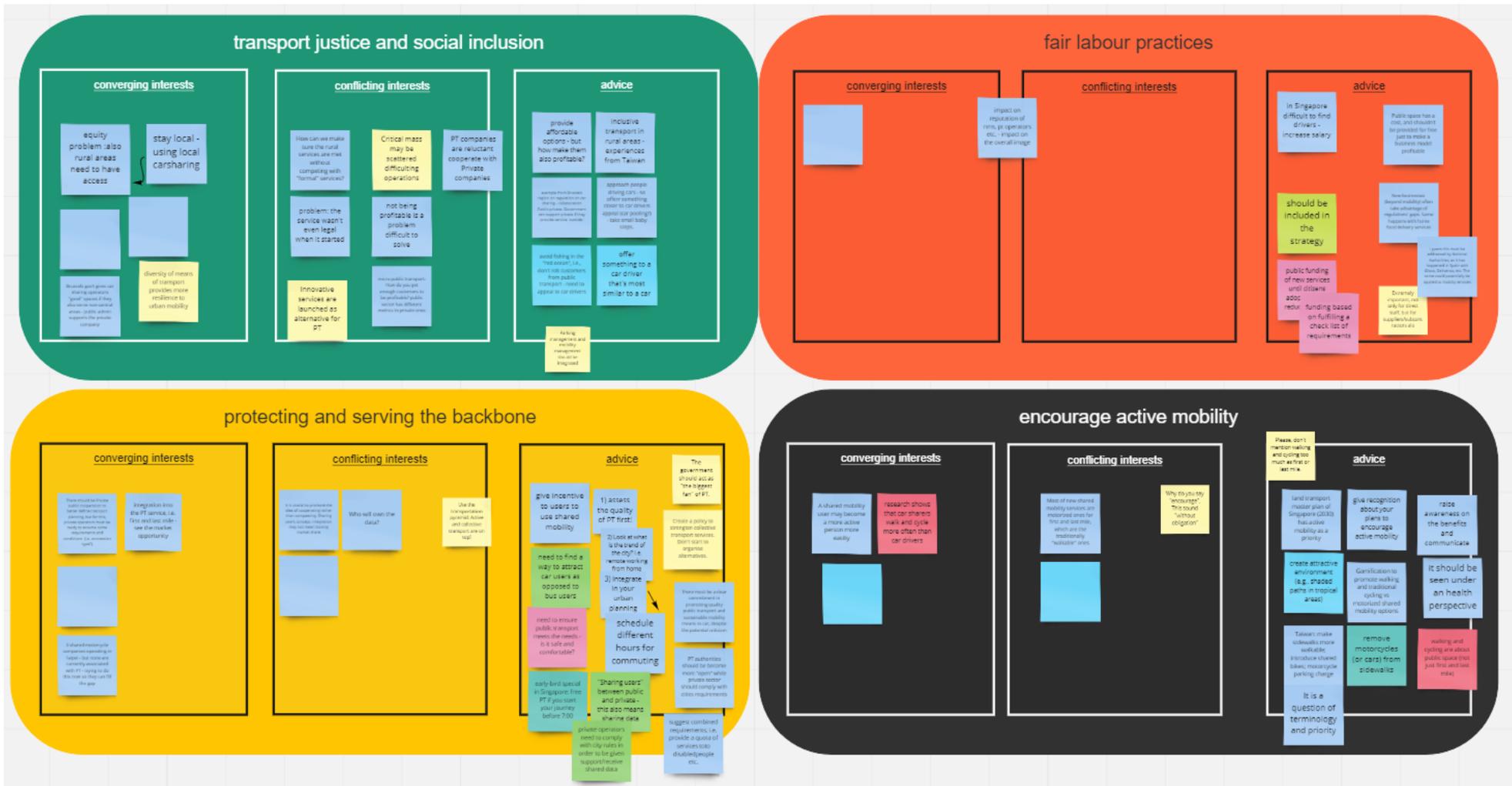


Figure 2: Conflicting interests: group 1 whiteboard results

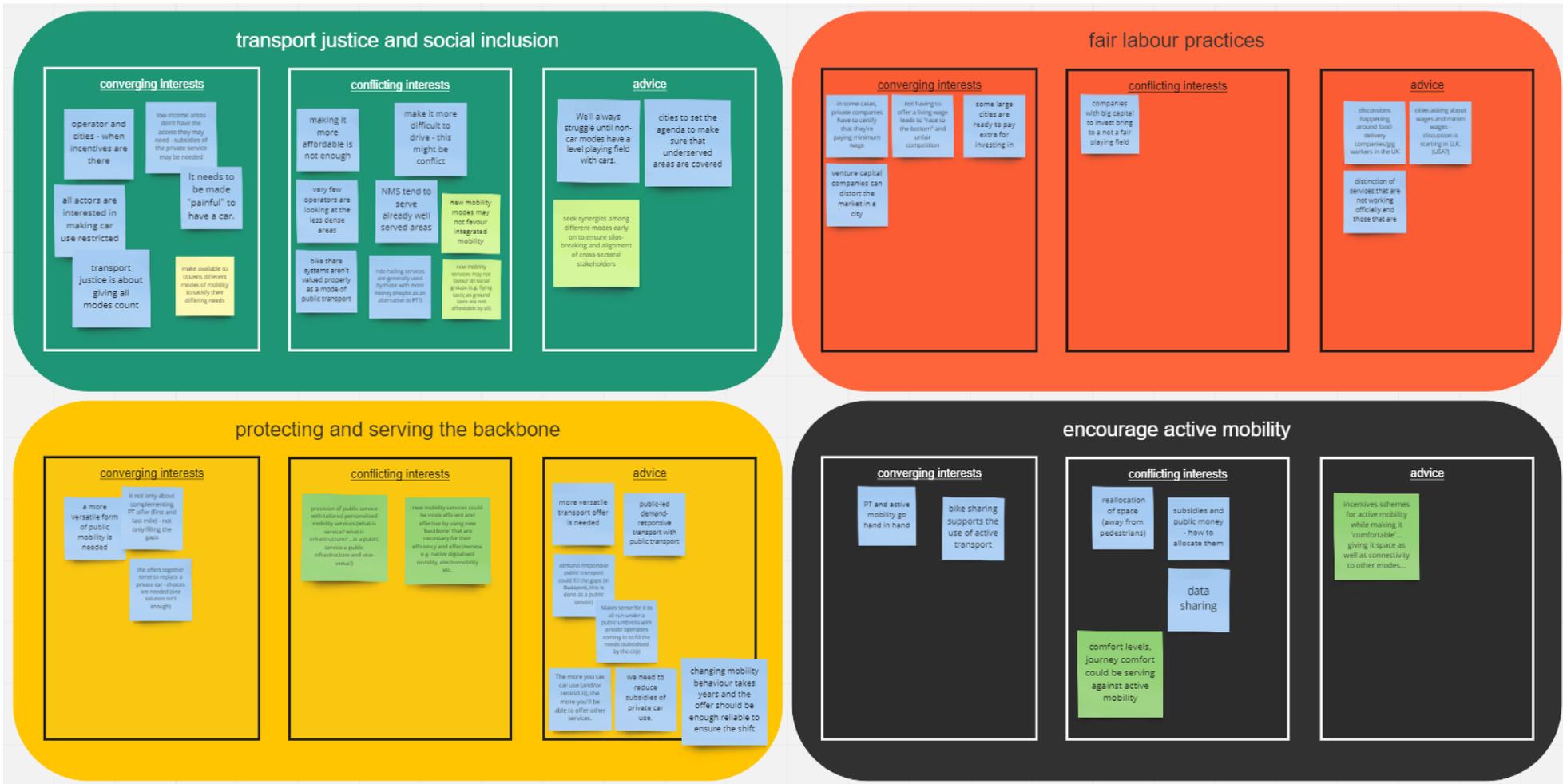


Figure 3: Conflicting interests: group 2 whiteboard results

## TRANSPORT JUSTICE & SOCIAL INCLUSION

*Away from the city centre, many suburbanites are either locked into car-dependency (and highly sensitive to restrictions), or captive users of public transport (who dream of buying a car). Accelerating the shift to sustainable mobility requires providing these populations with affordable options.*

- Transport Justice is about making all modes count (we'll always struggle until non-car-modes have a level playing field with cars)
- Diversity of modes of transport provides more resilience to Urban Mobility
- Lower-income areas often don't have the access they need (we have to make it appealing or at least viable for private operators to serve them)
- All actors are interested in making car use restricted (the monopoly private cars hold over urban space and mobility are harming the emergence of alternative, sustainable, shared modes)
- Behaviour change needs time, and private car users need alternatives, and baby steps (provide something closer, e.g., car pooling)

## ENCOURAGING ACTIVE MOBILITY

*Walking is the most environment-friendly mode of transport, with cycling a close second. We need to reduce transport carbon emissions, but in our sedentary society we also need more active mobility, to improve physical and mental health.*

- Public Transport and Active Mobility go hand in hand
- Bike sharing should be treated as Public Transport
- A Shared Mobility user may become a more active person more easily (research shows car sharers walk and cycle more often than car drivers)
- Walking and Cycling are about Public Space (not just an issue of "first and last mile")
- The space for walking and cycling has to be there (it has been taken away over the past decades, and is filled with cars, motorcycles, obstacles)

## FAIR LABOUR PRACTICES

*Some new mobility services, created by highly qualified tech professionals, with generous pay and benefits, are generating thousands of low-pay, no-benefit, "individual entrepreneurs". The externalisation of labour costs provides a competitive advantage – but who deals with the side-effects?*

- Not having to offer a living wage provides unfair competitive advantage (vis à vis regulated sectors, and socially responsible competitors in the same sector)
- Externalisation of labour costs and venture capital support impossible prices, and race to the bottom (distortion of market eliminates healthy business with long-term perspective, and leaves a hole when going away)
- Unfair labour practices harm the reputation of New Mobility Services
- The Public Sector can make a difference (e.g., some cities are asking about wages and make funding depend on minimum wages)
- Public money should not fund unfair labour practices ((public funding can support job creation, and creation of a critical mass of users, but should not be used to fund unfair competition against regulated actors)

*Figure 4: Overview of conflicts identified by stakeholder by topic*

## PROTECTING & SERVING THE BACKBONE

*Mass Public Transport carries large numbers of passengers, has deep influence in land-use, and (as became evident throughout the pandemic) is what keeps running, when crisis comes. It is the backbone of the urban mobility system – but it has its limitations, regarding capillarity and off-peak periods.*

- We need a more versatile transport offer (a private car offers reliability and versatility we need to diversify the alternative portfolio)
- It is crucial to promote the idea of cooperating rather than competing, of sharing users (integration doesn't lead to loss of market share, total bigger than the sum of the parts)
- Think beyond the first and last mile, and towards demand-responsive transport system (all run under a public umbrella with private operators receiving public support for serving public interest, from night service to quality service for people with disabilities)
- Clear commitment to quality public transport and sustainable mobility means vs private car (it's legitimate and indispensable to "tip the playing field" if behaviour is to change)
- Meeting diverse needs is a keystone (if alternative isn't safe, comfortable, reliable, affordable, why change?)

## 6.2 Looking ahead to 2040 (sessions 3 and 4, 14 April)

### GECKO input

The session started with GECKO input on the compliance map developed in the GECKO project. The objective of the GECKO compliance map is to assess the capability of existing regulatory frameworks to enable the implementation of innovative technologies and business models, while still safeguarding adequate level of security, safety, data privacy, and social protection. We looked at how the compliance map was developed and the performance indicators that were included to evaluate each of the regulations included in the monitoring tool (see Figure 5).

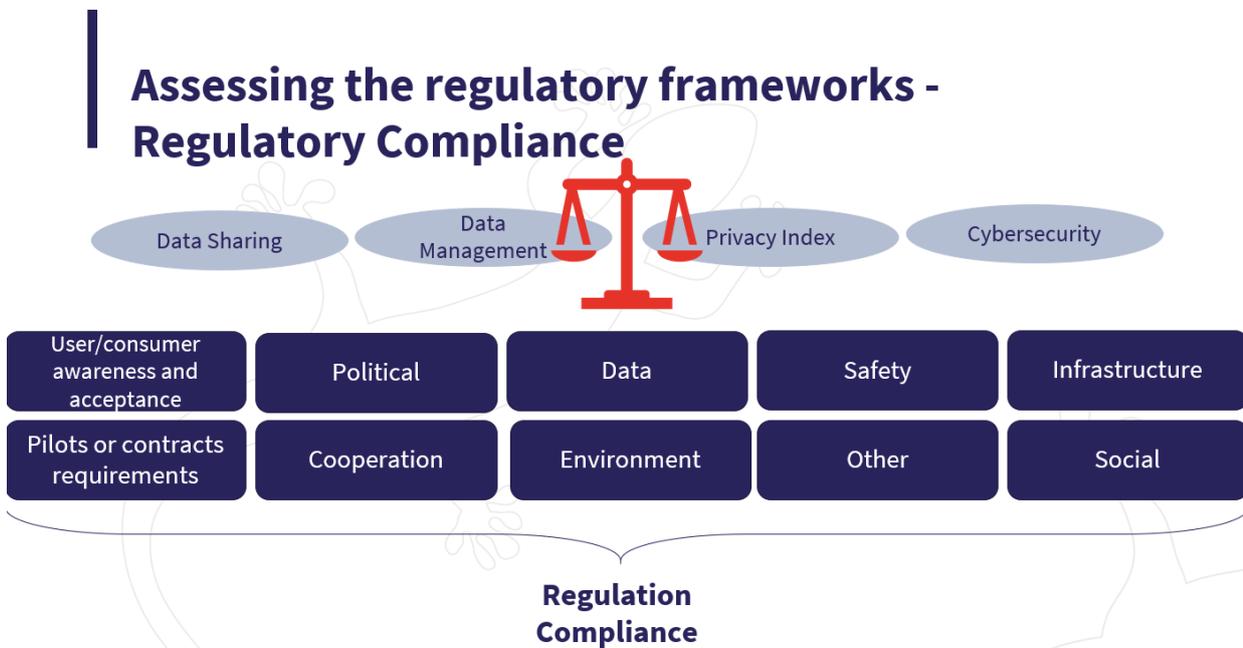


Figure 5: Development of the GECKO compliance map

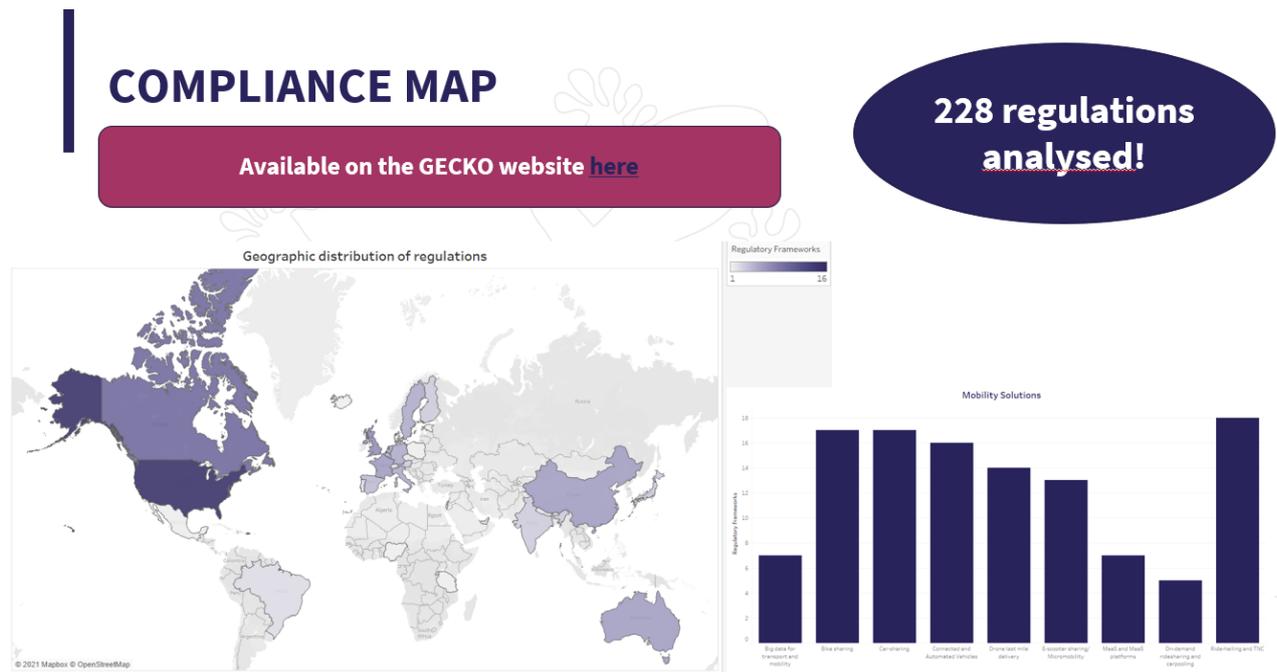


Figure 6: GECKO regulation monitoring tool: the compliance map

The GECKO compliance map tool is available on the GECKO website at: [Compliance Map: GECKO \(h2020-gecko.eu\)](https://h2020-gecko.eu).

## Stakeholder input

In preparation for the session “Looking ahead to 2040”, stakeholders were asked to complete pre-workshop survey questions asking them to prioritise a range of challenges around the regulation of new mobility (see Figure 7 and ANNEX 4: PRE-WORKSHOP QUESTIONNAIRE QUESTIONS). The challenges listed in the survey for prioritisation were previously identified by project partners through a review of the project deliverables and products and stakeholder input to date.

In advance of the workshop, participating stakeholders were also provided with GECKO’s sustainable mobility vision for 2040 (see ANNEX 5: GECKO 2040 VISION).



Figure 7: Summary of GECKO 2040 vision for urban mobility

The results of the pre-workshop survey provided the content that served as the basis for the white board used for these two sessions. In the survey, stakeholders were asked to prioritise challenges to the implementation of new mobility technologies and services as “must be addressed immediately”, “should be addressed in the medium term”, “not a priority” and “an ongoing tension that we’ll have to live with”. There were some significant differences in views among the different stakeholder groups about the priorities.

In the first session (see Figure 9), the stakeholders focussed on establishing a shared prioritisation of the challenges that were identified. Many comments and discussion points helped to focus and sharpen the identified challenges. There was quite a bit of discussion about what was defined as an “ongoing tension that we’ll have to live with”. Through the discussion, the stakeholders came to the agreement that this category was inappropriately named; the group decided it was rather “issues that need to be addressed on an ongoing basis”. The main comments can be found in Figure 11.

In the second session (see Figure 10), the stakeholders focussed on identifying actions to address the challenges identified as top and medium priorities. The identified immediate and mid-term priorities and ongoing issues – together with suggested actions – are summarised in Figure 13.



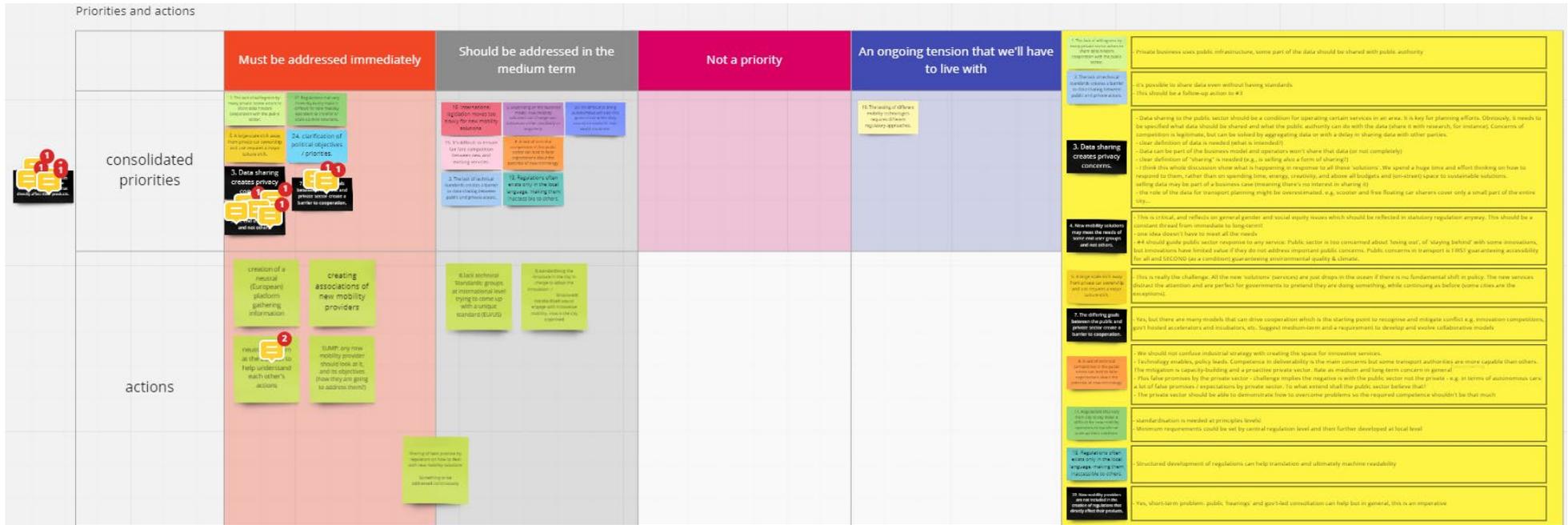


Figure 9: Looking ahead to 2040: group 2 whiteboard results

<p>1. The lack of willingness by many private sector actors to share data hinders cooperation with the public sector.</p>	<ul style="list-style-type: none"> <li>- Private business uses public infrastructure, some part of the data should be shared with public authority</li> </ul>
<p>2. The lack of technical standards creates a barrier to data sharing between public and private actors.</p>	<ul style="list-style-type: none"> <li>- it's possible to share data even without having standards</li> <li>- This should be a follow-up action to #3</li> </ul>
<p>3. Data sharing creates privacy concerns.</p>	<ul style="list-style-type: none"> <li>- Data sharing to the public sector should be a condition for operating certain services in an area. It is key for planning efforts. Obviously, it needs to be specified what data should be shared and what the public authority can do with the data (share it with research, for instance). Concerns of competition is legitimate, but can be solved by aggregating data or with a delay in sharing data with other parties.</li> <li>- clear definition of data is needed (what is intended?)</li> <li>- Data can be part of the business model and operators won't share that data (or not completely)</li> <li>- clear definition of "sharing" is needed (e.g., is selling also a form of sharing?)</li> <li>- I think this whole discussion show what is happening in response to all these 'solutions'. We spend a huge time and effort thinking on how to respond to them, rather than on spending time, energy, creativity, and above all budgets and (on-street) space to sustainable solutions. selling data may be part of a business case (meaning there's no interest in sharing it)</li> <li>- the role of the data for transport planning might be overestimated. e.g. scooter and free floating car sharers cover only a small part of the entire city...</li> </ul>
<p>4. New mobility solutions may meet the needs of some end user groups and not others.</p>	<ul style="list-style-type: none"> <li>- This is critical, and reflects on general gender and social equity issues which should be reflected in statutory regulation anyway. This should be a constant thread from immediate to long-term!!</li> <li>- one idea doesn't have to meet all the needs</li> <li>- #4 should guide public sector response to any service. Public sector is too concerned about 'losing out', of 'staying behind' with some innovations, but innovations have limited value if they do not address important public concerns. Public concerns in transport is FIRST guaranteeing accessibility for all and SECOND (as a condition) guaranteeing environmental quality &amp; climate.</li> </ul>
<p>6. A large scale shift away from private car ownership and use requires a major culture shift.</p>	<ul style="list-style-type: none"> <li>- This is really the challenge. All the new 'solutions' (services) are just drops in the ocean if there is no fundamental shift in policy. The new services distract the attention and are perfect for governments to pretend they are doing something, while continuing as before (some cities are the exceptions).</li> </ul>
<p>7. The differing goals between the public and private sector create a barrier to cooperation.</p>	<ul style="list-style-type: none"> <li>- Yes, but there are many models that can drive cooperation which is the starting point to recognise and mitigate conflict e.g. innovation competitions, gov't hosted accelerators and incubators, etc. Suggest medium-term and a requirement to develop and evolve collaborative models</li> </ul>
<p>8. A lack of technical competence in the public sector can lead to false expectations about the potential of new technology.</p>	<ul style="list-style-type: none"> <li>- We should not confuse industrial strategy with creating the space for innovative services.</li> <li>- Technology enables, policy leads. Competence in deliverability is the main concerns but some transport authorities are more capable than others. The mitigation is capacity-building and a proactive private sector. Rate as medium and long-term concern in general <small>(100% agreement)</small></li> <li>- Plus false promises by the private sector - challenge implies the negative is with the public sector not the private - e.g. in terms of autonomous cars: a lot of false promises / expectations by private sector. To what extent shall the public sector believe that?</li> <li>- The private sector should be able to demonstrate how to overcome problems so the required competence shouldn't be that much</li> </ul>
<p>17. Regulations that vary from city to city make it difficult for new mobility operators to transfer or scale-up their solutions.</p>	<ul style="list-style-type: none"> <li>- standardisation is needed at principles levels!</li> <li>- Minimum requirements could be set by central regulation level and then further developed at local level</li> </ul>
<p>18. Regulations often exists only in the local language, making them inaccessible to others.</p>	<ul style="list-style-type: none"> <li>- Structured development of regulations can help translation and ultimately machine readability</li> </ul>
<p>22. New mobility providers are not included in the creation of regulations that directly affect their products.</p>	<ul style="list-style-type: none"> <li>- Yes, short-term problem. public 'hearings' and gov't-led consultation can help but in general, this is an imperative</li> </ul>

Figure 10: Looking ahead to 2040: stakeholder comments on the challenges

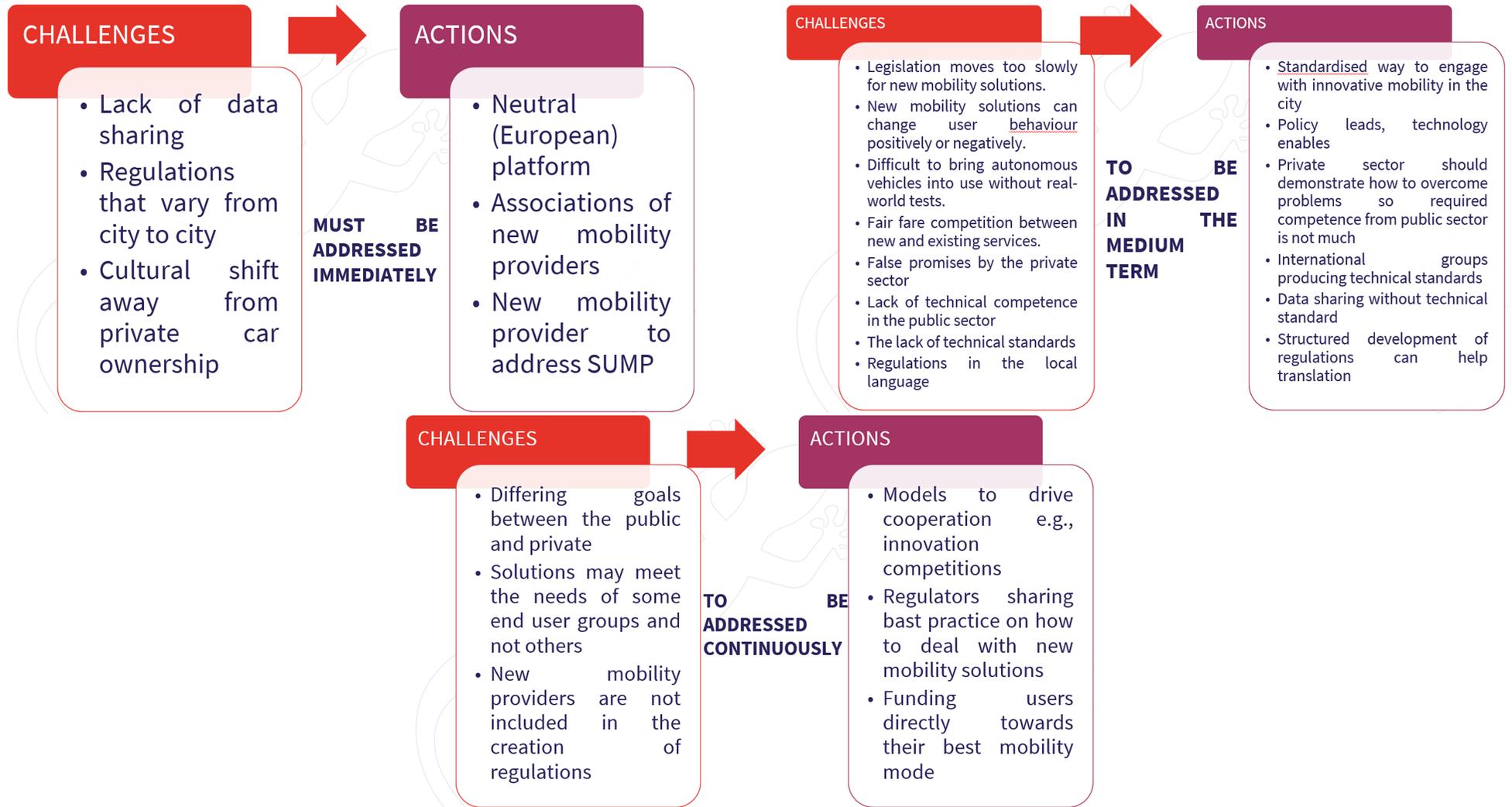


Figure 11: Summary of immediate, mid-term and ongoing challenges and some suggested actions identified by stakeholders

## 6.3 Recommendations (session 5, 15 April)

### GECKO input

In this session, stakeholders were provided with:

1. an overview of governance models and regulatory responses for mobility innovations
2. the highlights of a research paper written by GECKO partners looking at the regulatory responses to Covid-19 that affect new mobility services and technologies.

The report on the current governance of mobility innovations looked at the government level at which regulations are set as well as the approaches to governance. The applicability of different governance models is summarised in Figure 12. An example of Mobility as a Service was provided, showing examples of regulatory aspects taking place at the EU, national and local levels.

## Applicability of different governance models

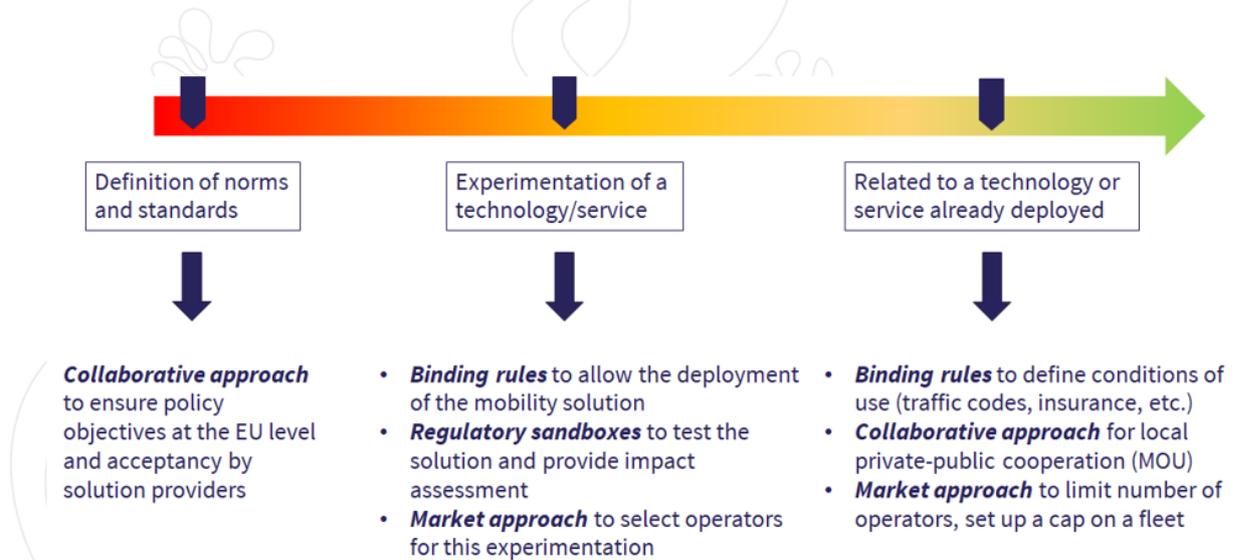


Figure 12: Different governance models and their applicability for new mobility services and technologies

The research paper described some Covid-19-related regulatory changes that have affected new mobility. These include free parking in some city centres, financial support for shared bicycles, temporary bike lanes and collaboration for traffic monitoring between private and public parties (see Figure 13).

## Examples from Europe: responses to COVID-19

Free parking in city downtowns (the UK)



Financial support for active modes in France and the UK

Temporary bike lanes in Berlin, Barcelona, Milan



Sustainable recovery plans (clean vehicles and fuels)



Collaboration for traffic monitoring between private and public parties in Spain, the UK, Germany



Figure 13: Regulatory responses to Covid-19 affecting new mobility services and technologies, as identified by the GECKO project

The outcome of the research paper looking at the regulatory responses to Covid-19 indicated some long-term impacts on the governance of mobility innovations. These include:

- Rethinking the role of public transport vs mobility services
- Changes in city space planning
- Collaborative governance
- Adaptive, flexible governance
- Data-driven governance

See also Figure 14.

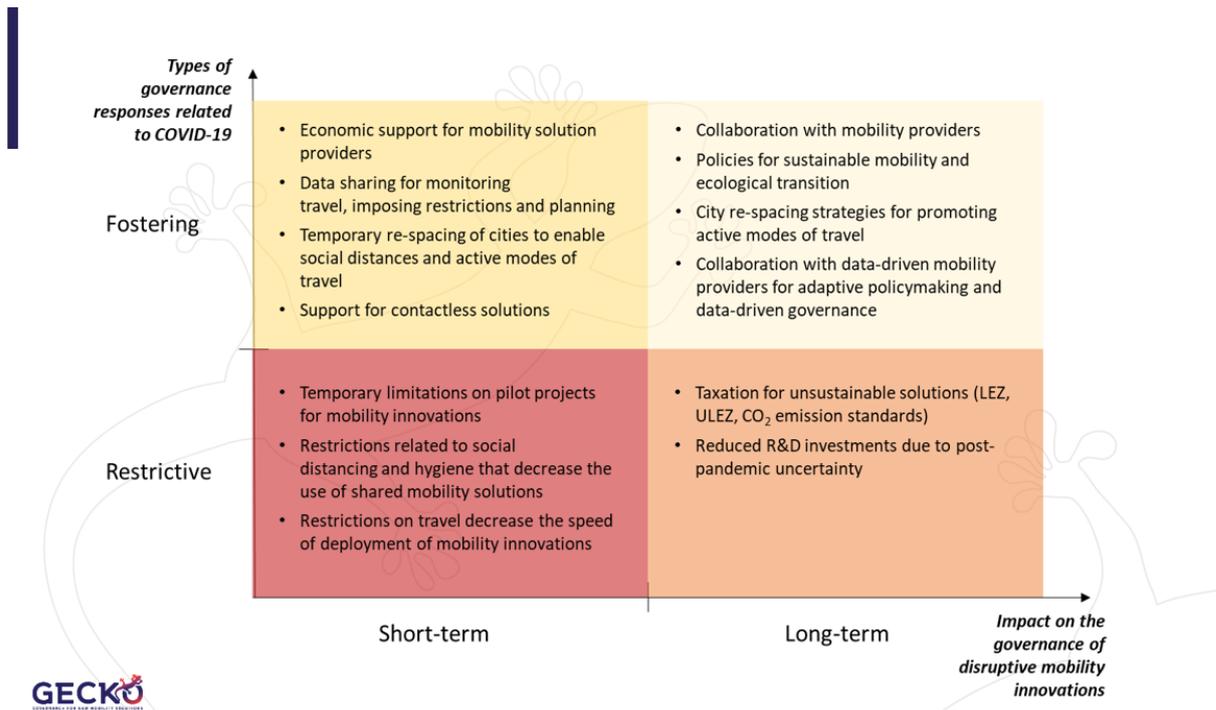


Figure 14: Matrix of governance responses to Covid-19 and the impact of the responses on new mobility services and technologies

## Stakeholder input

In the pre-workshop stakeholder survey, a set of policy statements was provided to the stakeholders, who were asked to express their level of agreement with each one. The statements had been identified by project partners through an analysis of project documentation.

Eleven policy statements were extracted from the output of the stakeholder survey, and these were categorised for the workshop whiteboard into the following groups (see also Figure 15):

- Private-public collaboration
- Data
- New regulatory approaches
- Sustainability, society and safety

For each of the identified policy statements, stakeholders were asked to consider the three questions:

1. What's preventing us from getting there?
2. Who is responsible for making this a reality?
3. What is the role of the European Commission?

The discussion results are summarised in Figure 16.

policy statements

	Public-private cooperation				Data		New regulatory approaches			Sustainability, society and safety			
	Authorities should take a proactive approach to the governance of disruptive mobility solutions, including dialogue with private parties developing disruptive mobility innovations, so as to be able to direct innovation in their desired direction.	For a new mobility service to succeed, strong cooperation between public and private parties is essential.	Public authorities should select potential partners among new mobility players based on data-based evidence of the positive impacts of the proposed service.	It is the role of authorities to consider the fit between the value proposition of disruptive innovations and new policies or regulatory frameworks.	Concrete strategies for the governance of data should be implemented at the European level so as to avoid industry self-governance.	Real-time data acquisition and analysis through data-driven mobility innovations should be used to enable proactive (rather than reactive) governance.	Traditional governance models (binding rules, market approach) should be mixed with flexible ones (collaborative regulation, regulatory sandboxes) to be adaptable to fast evolving services while still addressing policy objectives and avoiding unwanted effects.	As more and more mobility services combine resources from other industries (e.g., entertainment, shopping) to address customer needs, an adaptive governance framework should cross industry boundaries to support business model innovation.	All countries should clearly define safety standards to guarantee the overall safety of trials of new mobility solutions.  Safety is usually a major part of regulation	Regulatory frameworks must consider the social impacts of new mobility solutions, in terms of both the new services as well as competition with the existing ones.	Regulation should consider the environmental sustainability of new services, with the aim of maximising their benefits for the community.		
What's preventing us from getting there?	<p><b>Legal Framework</b></p> <ul style="list-style-type: none"> <li>Missing state of the art strategy for mobility innovation and services</li> <li>Administrative and authorities still have a clear primary business plan</li> <li>Role of local authorities is not always obvious (e.g. for innovative services like shared bikes, primarily to Civil Aviation Authority)</li> </ul>	<p><b>Distrust / lack of trust</b></p> <ul style="list-style-type: none"> <li>Cooperation is very useful, but other stakeholders are doing some of what the clients want to do</li> <li>Lack of standards</li> <li>Statist / legal / market</li> <li>Public bodies, regulators and local authorities are not always aligned with private actors (companies, entrepreneurs, citizens)</li> </ul>	<p><b>Data sharing</b></p> <ul style="list-style-type: none"> <li>Information, technology, infrastructure, etc. are not always shared by national operators - this is not always understood by other stakeholders</li> <li>Need a standardized data framework</li> <li>Need a standardised data framework</li> </ul>	<p><b>Lack of institutional capacity</b></p> <ul style="list-style-type: none"> <li>Institutional silos cannot address multi-sectoral challenges</li> <li>Capacity and funding from the local authority</li> <li>lack of integrated policy-making approach/strategic attitude</li> </ul>	<p><b>Lack of one fit-all solution</b></p> <ul style="list-style-type: none"> <li>Complexity</li> <li>Free market competition / rules</li> </ul>	<p><b>Privacy concerns</b></p> <ul style="list-style-type: none"> <li>The maximum use of real-time data acquisition and analysis through data-driven mobility innovations should be used to enable proactive (rather than reactive) governance</li> </ul>	<p><b>Challenging to identify metrics</b></p> <ul style="list-style-type: none"> <li>Diversity of transport policies across areas</li> </ul>	<p><b>institutional / regulatory silos</b></p> <ul style="list-style-type: none"> <li>Public and private sector do not understand how the game is played - can't create rules</li> <li>Delicate handling of tax money</li> </ul>	<p><b>regulators and law makers</b></p> <ul style="list-style-type: none"> <li>Regulatory processes are slow</li> <li>Need more data</li> <li>Need more data</li> </ul>	<p><b>It is very difficult to do innovation in a highly regulated and safety-critical mobility space</b></p> <ul style="list-style-type: none"> <li>Large number of trials for various purposes for putting on networks</li> </ul>	<p><b>Lobbies</b></p> <ul style="list-style-type: none"> <li>It seems that new mobility services are more a technology push than a "service push"</li> <li>Some measures increase usage, but this is not good</li> </ul>	<p><b>strong technology-push approaches</b></p>	
Who is responsible for making this a reality?	<p><b>Politicians</b></p> <ul style="list-style-type: none"> <li>Transportation Authorities</li> </ul>	<p><b>National government</b></p> <ul style="list-style-type: none"> <li>Local authorities still have a role to play in innovation and services</li> </ul>	<p><b>the authority should take the driving role, with a view to the wider market</b></p>	<p><b>National or European administration</b></p>	<p><b>Acquisition of the national regulation framework at the local level</b></p> <ul style="list-style-type: none"> <li>lack of resources and skills at local authority</li> </ul>	<p><b>regulators and law makers</b></p> <ul style="list-style-type: none"> <li>with a number of stakeholders (regulators, law makers, etc.)</li> </ul>			<p><b>social impacts of new mobility should be a local consideration</b></p> <ul style="list-style-type: none"> <li>with a number of stakeholders (regulators, law makers, etc.)</li> </ul>	<p><b>Authorities (local, national) will give "green light"</b></p> <ul style="list-style-type: none"> <li>Local authorities can promote active modes</li> </ul>	<p><b>Local authorities can promote active modes</b></p> <ul style="list-style-type: none"> <li>Collaboration with companies to design sustainable mobility plans for employees</li> </ul>		
What is the role of the European Commission?	<p><b>Subsidiarity principle</b></p> <ul style="list-style-type: none"> <li>Guidance and communication</li> <li>Share good practices</li> </ul>	<p><b>To set policy direction</b></p> <ul style="list-style-type: none"> <li>Set a regulatory framework (e.g. U-Space for drones)</li> <li>To drive consultation around common needs</li> </ul>	<p><b>To enable and promote inter-member collaboration</b></p> <ul style="list-style-type: none"> <li>To harness collaborative funding</li> </ul>	<p><b>To encourage the establishment of collaboration mechanisms / provide guidance</b></p>	<p><b>Pushing for an open data standard for everything that moves</b></p>	<p><b>Invite countries to set rules</b></p> <ul style="list-style-type: none"> <li>Consultation to identify common needs and to take leadership at community level</li> </ul>	<p><b>the EC should set a minimum (and mandatory) requirements that very intrusive but effective</b></p> <ul style="list-style-type: none"> <li>Administrative and legal provisions should be defined at the national level and implemented at the local level</li> </ul>			<p><b>Further analysis the social impact of new mobility services</b></p> <ul style="list-style-type: none"> <li>Act on transborder mobility (coordinate trials, when starting duration is comparable to air plans)</li> </ul>	<p><b>Produce and disseminate self-assessment tools to raise awareness</b></p>		

Figure 15: Recommendations session whiteboard results

## PUBLIC-PRIVATE COOPERATION

**What's preventing us from getting there?**

- Lack of strong view of the local mobility strategy
- Slow administration process
- Unclear role of local authorities
- Distrust
- Commercial Interests
- PAs think local → New mobility operators act global
- Standardised data framework
- Local authority funding

**Who is responsible for making this a reality**

- Shared responsibility between authority and private
- Having a framework within to cooperate and willingness from both sides helps
- Local city and transportation authorities should take the strong role
- National government

**What is the role of the EU?**

- Set policy direction
- Share good practices
- Consultation around common needs
- Set a regulatory framework
- Collaborative funding
- Pushing for an open data standard

## DATA

**What's preventing us from getting there?**

- Complexity
- Lack of a fit-all solution
- Privacy concerns
- Diversity of transport policies across areas
- Minimum set of real time data provided for free to authorities

**Who is responsible for making this a reality**

- National or European administration
- Local level for analysis
- Acquisition at the national/ regulation level

**What is the role of the EU?**

- Set minimum requirements

## NEW REGULATORY APPROACHES

**What's preventing us from getting there?**

- Institutional and regulatory silos → regulating across different industries
- Regulatory processes are time-consuming, so adaptive governance is limited to certain areas
- Delicate handling of tax money

**Who is responsible for making this a reality**

- Regulators and law makers
- Member states should be the main vehicle for deployment (in the EU)

**What is the role of the EU?**

- Superior framework that supports decision making processes and provides sort of "justifications"

## SUSTAINABILITY, SOCIETY AND SAFETY

**What's preventing us from getting there?**

- Balancing pedestrian and shared mobility space on sidewalks
- 'Technology-push' rather than 'service-push'

**Who is responsible for making this a reality**

- Local authorities can promote active modes
- Companies to develop sustainable mobility plans for employees
- Social impacts of new mobility should be a local consideration
- Member states to provide support and guidance

**What is the role of the EU?**

- Produce and disseminate self-assessment tools to raise awareness
- Establish the social impact criteria

Figure 16: Overview of the outcome of the Recommendations session

## 6.4 Summary (session 6, 15 April)

### GECKO input

The final session summarised all the previous sessions for the stakeholders so that they could learn from the sessions they were not involved in (see Figure 16).

	Tuesday	Wednesday	Thursday
AM	<b>Conflicting (and converging) interests 1</b> Identify differences in goals and needs between the private and public sectors in new mobility.	<b>Looking ahead to 2040 – challenges</b> In the context of a scenario for the mobility situation for 2040, stakeholders prioritised the challenges faced.	<b>Recommendations</b> Addressing policy statements around the regulation of new mobility (passenger and freight). What's keeping us from getting there? Where do responsibilities lie?
PM	<b>Conflicting (and converging) interests 2</b> Identify differences in goals and needs between the private and public sectors in new mobility.	<b>Looking ahead to 2040 – actions</b> In the context of a scenario for the mobility situation for 2040, stakeholders identified some actions to meet the identified challenges.	<b>Wrapping up</b> What have we learnt?

Figure 17: Overview of summary session

A summary of the points discussed in the sessions on conflicting (and converging) interests between the public and private sector (see 6.1 Conflicting interests (sessions 1 and 2, 13 April)) was provided. The main points are listed in Figure 4. This input fed directly into deliverable 4.1, Guidelines for new governance models.

A summary of the points discussed in the sessions on looking ahead to 2040 (see 6.2 Looking ahead to 2040 (session 3 and 4, 14 April)) was provided. The main points are listed in Figure 12. This input fed directly into deliverable 4.2, Adaptive Roadmap 2040.

A summary of the points discussed in the Recommendations sessions (see 6.3 Recommendations (session 5, 15 April)) was provided. The main points are listed in Figure 14. This input fed directly into deliverable 4.3, Joint Position Paper.

All Workshop 3 presentation slides, as well as the video recordings of the workshop sessions can be found on the GECKO website at: [Presentations: GECKO \(h2020-gecko.eu\)](https://www.gecko.eu/h2020-gecko.eu).

# ANNEX 1: STAKEHOLDER DIALOGUE AGENDA

## GOVERNANCE AND NEW MOBILITY: GECKO WORKSHOP 3 SHAPING THE FUTURE AGENDA

13-15 April 2021 (online)

*Note, stakeholders will be invited to individual sessions (as opposed to the entire week) and all will be invited to the final (summary) session on Thursday afternoon.*

### Tuesday, 13 April

#### **Conflicting interests – session 1**

*(6 stakeholders each from the private and the public sector)*

**10:00-11:30**

This session will take the form of group discussions. We'll ask participants to identify and address some of the differences in goals and needs between the private and public sectors in new mobility.

- What are the conflicting interests?
- How can these be overcome?

- Pedro Homem de Gouveia, Pasquale Cancellara and Piero Valmassoi, Polis
- Bonnie Fenton, Rupprecht Consult

*GECKO input: overview of new mobility services and business models*

#### **Conflicting interests – session 2**

*(6 stakeholders each from the private and the public sector)*

**15:30-17:00**

This session will take the form of group discussions. We'll ask participants to identify and address some of the differences in goals and needs between the private and public sectors in new mobility.

- What are the conflicting interests?
- How can these be overcome?

- Pedro Homem de Gouveia, Pasquale Cancellara and Piero Valmassoi, Polis
- Bonnie Fenton, Rupprecht Consult

*GECKO input: overview of new mobility services and business models*

## Wednesday, 14 April

### **Looking ahead to 2040 – session 1**

*(4 stakeholders each from the private and public sector and from “other influencers”)*

**10:00-11:30**

In the context of a scenario for the mobility situation for 2040 (which we will provide in advance), stakeholders will discuss the steps needed to get there, the challenges faced and how to overcome them.

- Yannick Bousse, UITP
- Bonnie Fenton, Rupprecht Consult

*GECKO input: GECKO new mobility regulation map*

### **Looking ahead to 2040 – session 2**

*(4 stakeholders each from the private and public sector and from “other influencers”)*

**15:30-17:00**

In the context of a scenario for the mobility situation for 2040 (which we will provide in advance), stakeholders will discuss the steps needed to get there, the challenges faced and how to overcome them.

- Yannick Bousse, UITP
- Bonnie Fenton, Rupprecht Consult

*GECKO input: GECKO new mobility regulation map*

## Thursday, 15 April

### **Recommendations**

*(4 stakeholders each from the private and public sector and from “other influencers”)*

**10:00-11:30**

In this session, we’ll address policy statements around the regulation of new mobility (passenger and freight)

- What needs to be considered?
- What are top priorities?

- Yannick Bousse, UITP
- Bonnie Fenton, Rupprecht Consult

*GECKO input: Analysis of regulations and governance models*

**Wrapping up**  
*(open to all GECKO stakeholders)*

**16 :00-17 :00**

This final session will be in a webinar format. It's open to all attendees from the week. Here, we'll share with you the outcomes of the various sessions from the week.

- Bonnie Fenton, Rupprecht Consult
- Yannick Bousse, UITP
- Pedro Homem de Gouveia, Polis

## ANNEX 2: WORKSHOP DATES, TIMING AND CONTENT

	Workshop 1		Workshop 2	Workshop 3	Final conference
<b>Dates</b>	Oct 2019 (M11)		May 2020 (M18)	April 2021 (M29)	August 2021 (M33)
<b>Related event</b>	Project consortium meeting		The planned related event, the International Transport Forum did not take place. Instead, the stakeholder dialogue took place online. The GECKO mid-term stakeholder event, also planned for ITF, has been postponed. Due to Covid uncertainties, a new date has yet to be set.	None: free-standing online event	
<b>Location</b>	London		online	online	online
<b>Project information and knowledge for stakeholders</b>	D1.1 New mobility services and technologies, knowledge bank (M6)	D1.2 Business models for new mobility services (M10)	D1.3 End users' perspectives and mobility needs (M12)	D1.4 New mobility services and business models (M26)	D4.1 Guidelines for new governance models (M30)
	D2.1 Regulatory responses and governance models (M6)	D2.2 Main economic, political and social variables (M12)	D2.3 Cooperation models among public and private parties (M12)	D2.5 Regulatory responses and governance models (M26)	D4.2 Adaptive Roadmap 2040 (M30)
		D2.4 Regulatory approaches and governance models for disruptive innovation (M15)	D2.4 Regulatory approaches and governance models for disruptive innovation (M15)	D3.2 GECKO impact assessment (M20)	D4.3 Joint Position Paper (M30)
		D3.1 GECKO frameworks dashboard (M14)	D3.1 GECKO frameworks dashboard (M14)		

<b>Input requested of stakeholders</b>	<p>D1.2 Business models for new mobility services (M10)</p> <p>D2.2 Main economic, political and social variables (M12)</p> <p>D2.3 Cooperation models among public and private parties (M12)</p> <p>D2.4 Regulatory approaches and governance models for disruptive innovation (M15)</p> <p>D3.1 GECKO frameworks dashboard (M14)</p>	<p>D3.2 Impact assessment (M20)</p> <p>D3.3 GECKO compliance map and future requirements (M24)</p>	<p>D3.3 GECKO compliance map and future requirements (M24)</p> <p>D4.1 Guidelines for new governance models (M30)</p> <p>D4.2 Adaptive Roadmap 2040 (M30)</p> <p>D4.3 Joint Position Paper (M30)</p>
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## ANNEX 3: WORKSHOP ATTENDEES

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### GECKO stakeholder workshop attendees, 13-15 April 2021, online

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	<b>Name</b>		<b>Organisation</b>	<b>Session(s)</b>
<b>1</b>	Vassilis	Agouridas	AIRBUS	Conflicting interests, recommendations, summary
<b>2</b>	Christophe	Arnaud	Blue Systems	Conflicting interests, recommendations, summary
<b>3</b>	Giles	Bailey	TravelSpirit Foundation	Looking to 2040, recommendations
<b>4</b>	Juan Vincen	Balaguer	Zeleros	Conflicting interests
<b>5</b>	Tommaso	Bonino	SRM Bologna	Recommendations, summary
<b>6</b>	Yannick	Bousse	UITP (GECKO consortium)	
<b>7</b>	Caroline	Busquet	Absiskey (GECKO consortium)	
<b>8</b>	Pasquale	Cancellara	Polis (GECKO consortium)	
<b>9</b>	Daniele	Celere	Havi Logistics	Looking to 2040, summary

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<b>10</b>	Lewis	Chen	Car Club	Conflicting interests, recommendations, summary
<b>11</b>	Gennaro	Cicarelli	TTS Italia	Summary
<b>12</b>	Filip	Djupsjöbacka	Kyyti	Summary
<b>13</b>	Domokos	Esztergar-Kis	BME Budapest	Summary
<b>14</b>	Bonnie	Fenton	Rupprecht Consult (GECKO consortium)	
<b>15</b>	Sergio	Fernandez Balaguer	EMT Madrid	Conflicting interests, recommendations, summary
<b>16</b>	Maciej	Florczak	ZTM Warsaw	Looking to 2040
<b>17</b>	Nicolas	Frasie	Communauto	Conflicting interests
<b>18</b>	Marco	Fuster	BERNMobil	Recommendations, summary
<b>19</b>	Marion	Galan Alonso	Donkey Republic	Looking to 2040
<b>20</b>	Thomas	Geier	EMTA	Looking to 2040, summary
<b>21</b>	Michael	Glitz-Richter	City of Bremen	Looking to 2040
<b>22</b>	Tamás	Halmos	BKK Centre for Budapest Transport	Conflicting interests, summary
<b>23</b>	Gayang	Ho	UITP Asia Pacific	Looking to 2040

<b>24</b>	Marc	Iglesias Perez	AMB	Conflicting interests
<b>25</b>	Ping-Jen	Kao	University College London (GECKO consortium)	
<b>26</b>	Ignat	Kulkov	Åbo Akademi University (GECKO consortium)	
<b>27</b>	Renata	Lajas	ARUP	Looking to 2040, summary
<b>28</b>	Jeff	Liu	MoT Taiwan	Conflicting interests
<b>29</b>	Valerio	Lubello	Bocconi University (GECKO consortium)	
<b>30</b>	Pedro	Machado	City of Lisbon	Looking to 2040, summary
<b>31</b>	Karel	Martens	Technion University Israel	Looking to 2040
<b>32</b>	Marisa	Meta	FIT Consulting (GECKO consortium)	
<b>33</b>	Angelo	Meuleman	Taxistop	Conflicting interests, summary
<b>34</b>	Welmoed	Neijmeijer	Bolt	Looking to 2040, summary
<b>35</b>	Alan	O'Kelly	FREE NOW group	Conflicting interests, summary

<b>36</b>	Gregor	Petri	Fluidtime Data Services GmbH	Conflicting interests, summary
<b>37</b>	Andrew	Pickford	TTC Global	Looking to 2040, recommendations, summary
<b>38</b>	Martin	Röhrleef	UESTRA Hannover	Conflicting interests, summary
<b>39</b>	Jayant	Sangwan	Corte (GECKO consortium)	
<b>40</b>	Carol	Schweiger	Tech4Transit	Looking to 2040, recommendations, summary
<b>42</b>	Krysia	Solheim	Nextbike	Conflicting interests, summary
<b>43</b>	Jakob	Spranger	Toyota Motors Europe	Looking to 2040
<b>44</b>	Peter	Staelens	Eurocities	Looking to 2040, recommendations, summary
<b>45</b>	Bronwen	Thornton	Walk 21	Looking to 2040, summary
<b>46</b>	Anastasia	Tsvetkova	Åbo Akademi University (GECKO consortium)	
<b>47</b>	Antoine	Verhulst	Blabla Car	Recommendations
<b>48</b>	Egon	Warkinton	Continental Corporation	Looking to 2040, summary

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<b>49</b>	Claire	Wiseman	Transport for London	Summary
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## ANNEX 4: PRE-WORKSHOP QUESTIONNAIRE QUESTIONS

### *About you*

1. Your name
2. Your organisation
3. Are you:
  - a. a public policy maker
  - b. someone from the private sector who creates or offers new mobility services or technologies
  - c. a researcher, NGO representative or other with a (non-business) interest in new mobility technologies, issues or solutions

## Policy statements

### 4. Throughout the project, we've identified many positions and statements related to the regulation and governance of new mobility. We would like to know if you agree or disagree with each of the 20 statements below.

For each statement below, please decide if you **strongly disagree** (-2), **somewhat disagree** (-1), are **neutral** (0), **somewhat agree** (+1) or **strongly agree** (+2).

	-2	-1	0	+1	+2
1. Disruptive innovations will lead the way to mobility which pivots away from vehicle ownership towards use (and costing) of individual journeys.	<input type="radio"/>				
2. As more and more mobility services combine resources from other industries (e.g., entertainment, shopping) to address customer needs, an adaptive governance framework should cross industry boundaries to support business model innovation.	<input type="radio"/>				
3. Concrete strategies for the governance of data should be implemented at the European level so as to avoid industry self-governance.	<input type="radio"/>				
4. Real-time data acquisition and analysis through data-driven mobility innovations should be used to enable proactive (rather than reactive) governance.	<input type="radio"/>				
5. Digitalisation of infrastructure and continual updating of educational programmes and staff training to ensure the acceptance of these new technologies should be carried out at the national level.	<input type="radio"/>				
6. Authorities should take a proactive approach to the governance of disruptive mobility solutions, including dialogue with private parties developing disruptive mobility innovations, so as to be able to direct innovation in their desired direction.	<input type="radio"/>				
7. Given that it is difficult for new providers to compete with existing ones (which may be less environmentally sustainable), authorities should help promote new mobility services and educate end-users, particularly for start-ups that are not able to make large investments.	<input type="radio"/>				
8. Public authorities should select potential partners among new mobility players based on data-based evidence of the positive impacts of the proposed service.	<input type="radio"/>				
9. In order for a new mobility service to succeed, strong cooperation between public and private parties is essential.	<input type="radio"/>				
10. It is the role of authorities to consider the 'fit' between the value proposition of disruptive innovations and new policies or regulatory frameworks.	<input type="radio"/>				
11. 'Traditional' governance models (binding rules, market approach) should be mixed with flexible ones (collaborative regulation, regulatory sandboxes) to be adaptable to fast-evolving services while still addressing policy objectives and avoiding unwanted effects.	<input type="radio"/>				
12. Regulations should be defined according to the results of multi-year pilot programmes, including the analysis of user feedback.	<input type="radio"/>				
13. Contracts based on detailed specifications, coupled with competition, constitute a rigid framework that prevents public transport services from evolving. Instruments that evolve over time are preferable.	<input type="radio"/>				
14. Governments should develop flexible regulations and policies fostering the creation of new mobility platforms for data and resource exchanges to support disruptive innovation business models.	<input type="radio"/>				
15. Regulation should be done by purpose or function rather than by vehicle type (e.g., if an e-scooter fulfils the same purpose as a bike, it should be categorised as a bicycle in terms of regulation) so as to avoid the need to re-write regulations with each innovation.	<input type="radio"/>				
16. Regulation should be fluid, with public authorities using data to monitor and evaluate new mobility business models and adjusting the regulatory framework depending on the success (or lack of success) of the new mobility solution.	<input type="radio"/>				
17. EU countries have many areas of regulation that have been made obsolete by new mobility and which now act as an obstacle to innovation and to new technologies and new business models.	<input type="radio"/>				
18. All countries should clearly define safety standards to guarantee the overall safety of trials of new mobility solutions.	<input type="radio"/>				
19. Regulatory frameworks must take into account the social impacts of new mobility solutions, in terms of both the new services as well as competition with the existing ones.	<input type="radio"/>				
20. Regulation should take into account the environmental sustainability of new services, with the aim of maximising their benefits for the community.	<input type="radio"/>				

### Setting priorities as we move forward

5. During the course of our project, we (with input from you, our expert stakeholders) have identified 23 challenges to the regulation and governance of new mobility. We would like you to help us prioritise them.

Please **drag and drop** each of the identified challenges **into one of the four categories**.

Items			
The lack of willingness by many private sector actors to share data hinders cooperation with the public sector.	There is a lack of platforms or forums for the public and private sector to engage with one another.	The testing of different mobility technologies requires different regulatory approaches.	Must be addressed immediately
The lack of technical standards creates a barrier to data sharing between public and private actors.	Some promising new mobility start-ups lack resources for successful commercialisation.	It's difficult to bring autonomous vehicles into general use when they cannot be tested in real-world situations.	
Data sharing creates privacy concerns.	Many shared mobility providers have had difficulty developing a financially sustainable business model.	Different governance models and regulatory approaches are suitable at different stages of development of a mobility innovation.	
New mobility solutions may meet the needs of some end user groups and not others.	Sharing scheme might decrease the long-term profit of autonomous mobility firms.	New mobility providers are not included in the creation of regulations that directly affect their products.	
Depending on the business model, new mobility solutions can change user behaviour either positively or negatively.	Public transport companies often receive protection that new mobility providers do not.	There are still ethical issues related to artificial intelligence algorithms in autonomous mobility.	Should be addressed in the medium term
A large-scale shift away from private car ownership and use requires a major culture shift.	It's difficult to ensure fair fare competition between new and existing services.		
The differing goals between the public and private sector create a barrier to cooperation.	International legislation moves too slowly for new mobility solutions.		Not a priority
A lack of technical competence in the public sector can lead to false expectations about the potential of new technology.	Regulations that vary from city to city make it difficult for new mobility operators to transfer or scale-up their solutions.		
The commercial interests of private sector providers reduce public sector trust.	Regulations often exists only in the local language, making them inaccessible to others.		An ongoing tension that we will have to live with

## Covid-19 and the governance of new mobility

*This next 3 questions are not mandatory but if you have a few extra minutes, we'd be grateful for your input. Otherwise, feel free to skip to the end - with our thanks for getting this far.*

*GECKO is working on an academic paper looking at the effects Covid-19 may have on the governance of new mobility solutions. We're trying to understand how governance changes brought on by the pandemic may (directly or indirectly) lead to changes in the way new mobility is governed.*

6. What governance responses to COVID-19 have affected the disruptive mobility innovations that you are familiar with and how? (please provide 1-3 examples) (e.g., reallocations of urban space has led to more people using bike sharing, financial subsidy of service X has disadvantaged service Y, free car parking in the city centre has discouraged the use of shared mobility...)

example 1

example 2

example 3

7. Referring to your example(s) above, do you think the effect on new mobility will be temporary (ending with the pandemic) or permanent?

	temporary to the pandemic	permanent	unclear
example 1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
example 2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
example 3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

8. How do you think the pandemic will change the way disruptive mobility is governed? (e.g., more/less collaboration, more/fewer data-informed decisions, faster/slower decision making...)

# ANNEX 5: GECKO 2040 VISION

Hand-out provided in advance to stakeholders in the Looking Ahead to 2040 sessions.



## GECKO 2040 VISION

The development of GECKO's Adaptive Regulation Roadmap is focused on the achievement of the EU's objectives for urban mobility, as specified in the 2020 Sustainable and Smart Mobility Strategy, which fits within the European Green Deal target of at least 55% greenhouse gas reduction by 2030 and climate neutrality by 2050.

GECKO sets out a vision of the urban mobility systems following the three pillars of future actions in the Sustainable and Smart Mobility Strategy. The vision was identified through desk research with sources from the EU, ITF, Arthur D. Little and GECKO partners.

### 1. MAKE ALL TRANSPORT MODES MORE SUSTAINABLE

- The switch from internal combustion engine to low- and zero-emission vehicles is accelerated, and the use of private vehicles is gradually reduced.
- Sustainable urban mobility planning includes the freight dimension through dedicated sustainable urban logistics plans that accelerate the deployment of zero-emission solutions for e-commerce.
- Integration of land-use and mobility planning has been strengthened by integrated land-use and transport plans.
- Transport is accessible for persons with reduced mobility and persons with disabilities.
- Continuous efforts by international, national, and local authorities, stakeholders, and citizens lead to a goal of zero fatalities from mobility.
- There has been an increase in the number of women in transport professions.
- Following the COVID-19 pandemic, work from home remains encouraged, which reduces transport emissions.

### 2. MAKE SUSTAINABLE ALTERNATIVES WIDELY AVAILABLE IN A MULTIMODAL TRANSPORT SYSTEM

- Transport modes are better integrated resulting in a higher mode share of public transport, walking and cycling.
- Active travel has significantly grown, improving air quality, and providing health benefits for citizens that include positive impacts on diabetes, mental health, obesity and a decreased risk of cardiovascular disease and different types of cancers.
- Public transport is maintained as the backbone of the urban mobility system and new mobility solutions are integrated to support a more sustainable city vision which is less dependent on the private car.
- Mobility-as-a-Service (MaaS) has been successfully rolled out and adopted across various demographic groups.

### 3. PUT IN PLACE THE RIGHT INCENTIVES TO DRIVE THE TRANSITION TO ZERO-EMISSION MOBILITY

- Public authorities steer and guide new mobility solutions so as to reach their policy goals.
- The 'polluter pays' and 'user pays' principles have been implemented in all transport modes, internalising external costs.
- Local and regional collective transport investments have been prioritized as a key accelerator towards a carbon-neutral economy.
- Road charging has increased shared and collaborative mobility services, leading to reduced congestion on roads.
- Parking is regulated more actively to create incentives for space-efficient transport and reduced congestion.
- Higher social standards have contributed to an increased labour attractiveness for transport workers.

The consortium of GECKO consists of 9 partners with multidisciplinary and complementary competencies. This includes leading universities, networks and industry sector specialists.



#### Contact:

Stakeholder Engagement Coordinator: Bonnie Fenton, Rupprecht Consult

Tel. +49-221-60 60 55 27

E-mail: [b.fenton@rupprecht-consult.eu](mailto:b.fenton@rupprecht-consult.eu)

Project Coordinator: Yannick Bousse, UITP

Tel. +32-2-788 01 25

E-mail: [yannick.bousse@uitp.org](mailto:yannick.bousse@uitp.org)



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