

Mobility as a Service - the 'unicorn' of mobility services

*Innovations and key lessons from the
Netherlands*

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Project related

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 - Availability of shared mobility
 - A cooperative governance structure
 - Cooperation between stakeholders



Looking back: the development of MaaS

- Mobility as a Service in the Netherlands
 - National program started in 2017
 - The program stopped in 2022
 - Evaluation: 2024
- The intended scale-up was **not achieved**
 - However, involved stakeholders still see a future for MaaS

1

National program

National coordination (Ministry of transport)

- Data and technical background
- Stakeholder management
- Knowledge development and monitoring
- Communication

2

Regional pilots

Seven regional pilots

- Each focussed on their own region and target user groups
- National contracts to ensure similar principles
- Regional public-private partnerships (between governments and service providers)

Key learnings from MaaS in the Netherlands

01

Behavioural change is a long-term process

02

Timing of introduction is essential

03

Scale is relevant
(especially in a small country)

04

MaaS apps should attract **multiple user groups**

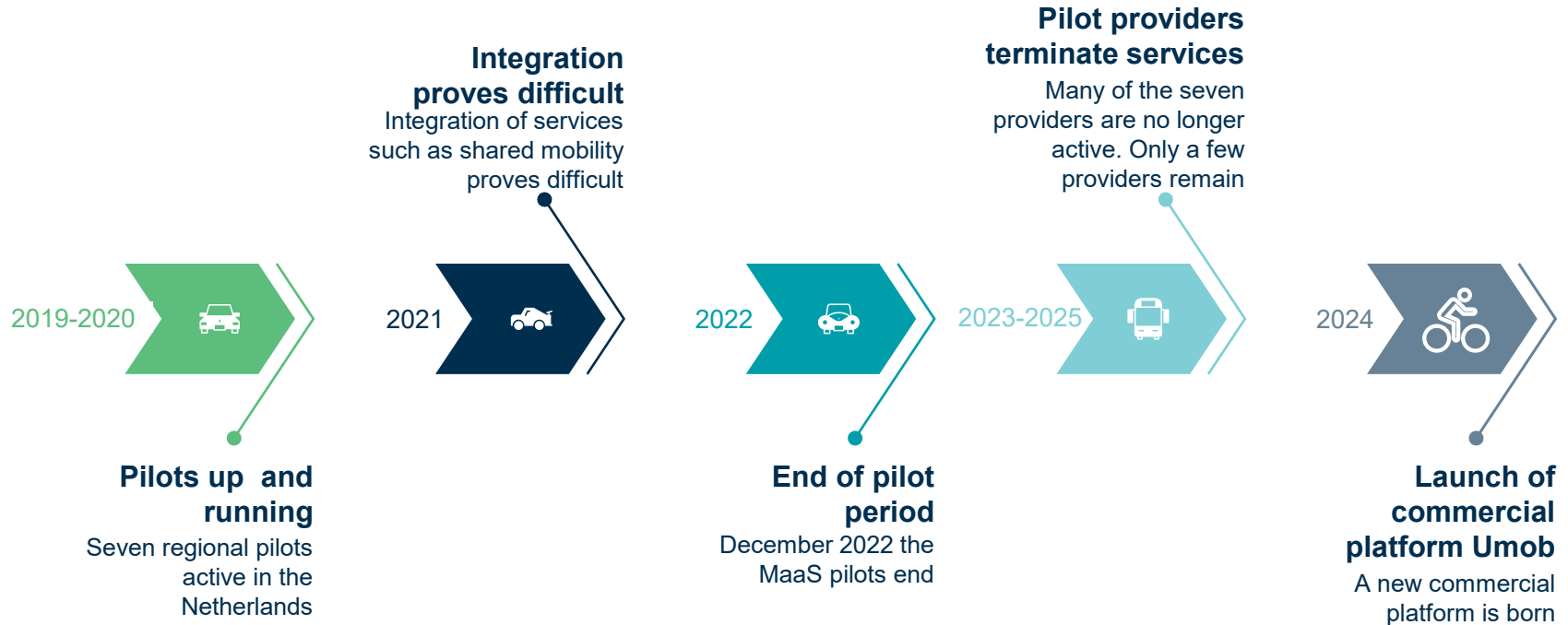
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Invest in solid **technical infrastructure** and **digital integrations**

06

Level playing field conditions are essential

MaaS in the Netherlands - a simplified timeframe



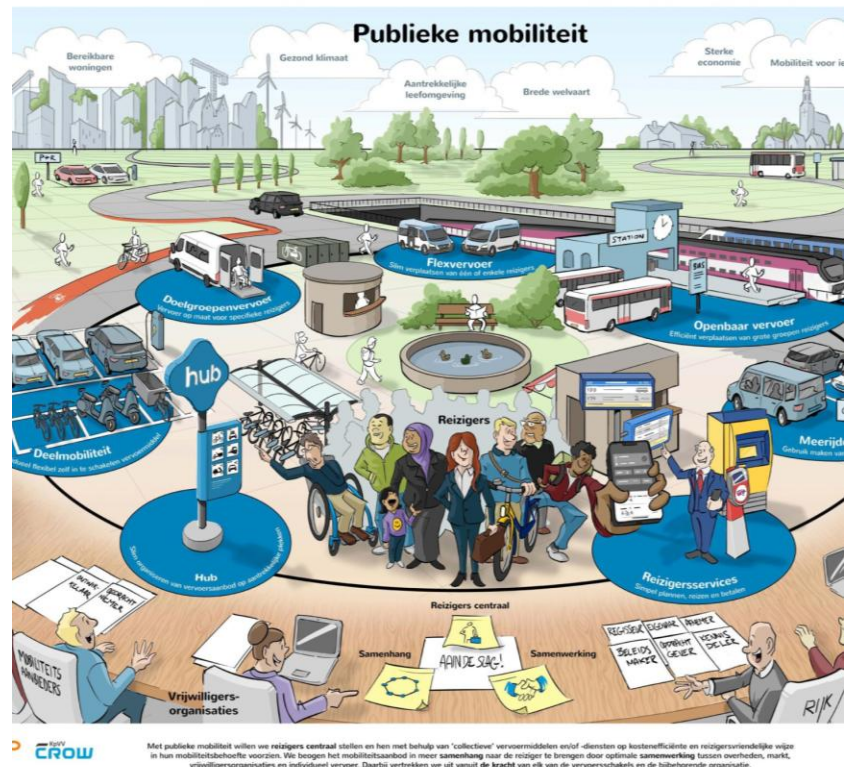
The current situation – a new approach

- Since 2023, commercial MaaS provider Umob has launched in the Dutch market
 - Offering full integration, across Europe to providers (in 15+ countries)
 - Large scale marketings budgets targeting a young audience
- Recently, Umob has 'won' the public tender for shared mobility in the City of Eindhoven
 - City: 250.000 inhabitants, the metropolitan region: 800.000 inhabitants
- Of the pilot providers, few remain, mainly focussed on the business market



Looking forward – public mobility...?

- In 2025, the Dutch national government works on **'public mobility'**
 - Integrating public services such as public transport, paratransit and flexible transport services
 - Public transport is more difficult to finance in rural area's → increasing **mobility poverty**
 - Integrating services should make them more **accessible and applicable** for a broader audience
 - Similar **pilot approach** as the original MaaS pilots based on the regional public transport agencies
- **In the next phase:**
 - Integrating shared mobility and other 'semi-public' services in the platforms
 - A different approach to achieving MaaS



The essentials

The earlier experiments show

- Successful **integration of shared services** is essential
- A **cooperative governance structure** is essential
- **Cooperation** between stakeholders create a stronger product

Governance

- Embed MaaS in **broad policy objectives** and use this to secure long-term funding
- Multiple service providers and governments need to **work together**
 - Regions and municipalities, national public transport, regional public transport, shared mobility (often operating through municipal contracts / tenders), Taxi services (often operating under municipal permits)
 - Public or private MaaS services: **outsourcing or in-house** MaaS application
- **Do not haste the implementation** of MaaS
 - Align stakeholder objectives
 - The level and manner of digital integration should be clear
 - Pricing conditions for a MaaS provider and sub-service providers should be established
 - Monitoring practices should be concrete

The essentials: Shared mobility

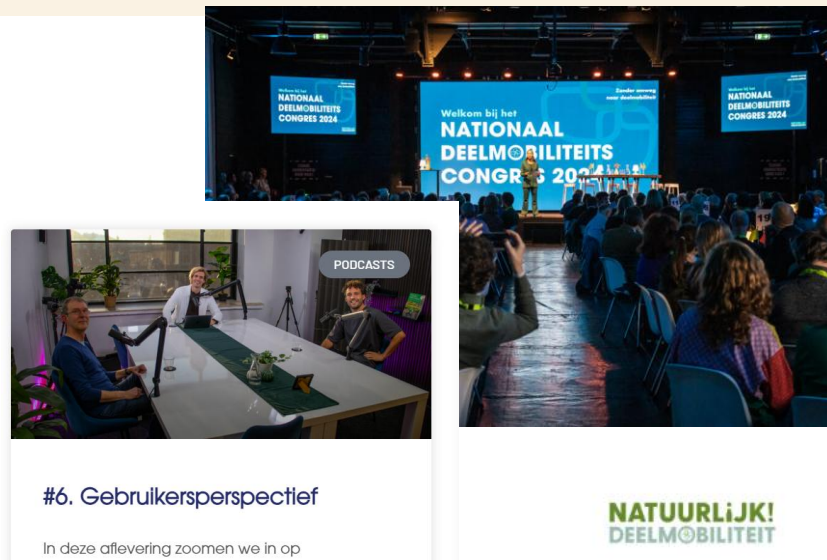
Shared mobility (and other services)

- In 2017, shared mobility services were very limited
- Since then: the market share and digital availabilities have increased
 - An abundance of providers are active and differ per city or region → increases the need for integration
- Since 2024: **National program Shared Mobility**
 - **The fly-wheel effect:** using pioneer knowledge to standardize and increase accessible shared mobility policies
 - **Together with partners:** sharing providers and **40** regional and municipal governments
 - **Thematic approach:** attention for differentiation
 - **Data standardisation:** Continuous development

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Shared mobility: A national platform

- In the first two years of the program (running until 2028), the national program has:
 - Published **standardized 'model' contracts** for shared mobility
 - **Researched and monitored impact and growth** of shared mobility and shared mobility hubs
 - Network events, podcasts and congresses
 - Developed toolboxes:
 - Carsharing in new developments
 - Community sharing
 - Data standardisation for monitoring



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**Staat van de
deelmobiliteit 2025**

Ontwikkeling naar een volwassen
markt zet door

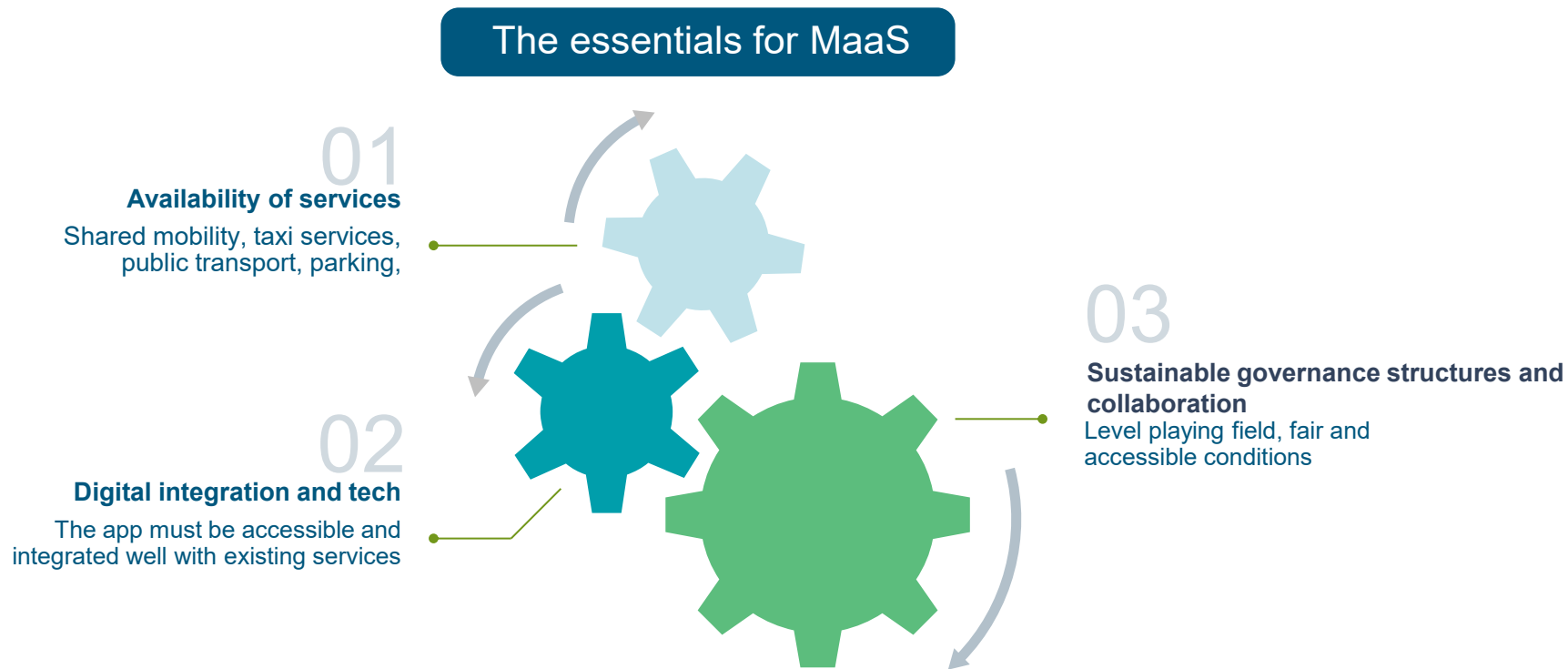
The essentials: collaboration with stakeholders

- A MaaS app is only as successful as it's users
- Working together with stakeholders in the region, can attract different user groups as well as introduce new services
 - Business travel
 - Event management
 - Tourists
- Success stories from the Netherlands
 - **ASML**: 20.000 employees, 1.000 E-bikes and Mobility App
 - **Utrecht**: accessibility of business parks with city-wide shared bicycles and MaaS price reductions



Drop Mobility E-bikes

Conclusion: the essentials of MaaS



Thank you for your attention!

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