International Transport Forum

ITF Innovation Hub Project: New Mobility Outlook

8th ITF Statistics Meeting

19-20 September 2022

OECD

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Presentation Outline

1. Innovation Hub

2. Project description + objectives

3. Expert survey

4. Expert workshop

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Innovation Hub

- Funded by South Korea

- It will work with member countries to anticipate, identify and assess policy-relevant innovations and to maximise their ability to introduce effective policies.

- Other three projects:
  - ➢Labour impacts of automation on the transport industry
  - ➢Upshifting urban mobility to sustainability with light mobility
  - ➢Accessibility in Korea for different socio-economic groups

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New Mobility Outlook: Project description

- Over the last decade, a number of new mobility services and modes have emerged, leading to growing changes in travel, especially in urban areas. Sharing vehicles/services in cities are more widespread, and the use of new types of vehicles are more frequent.

- Data on these emerging mobility patterns and vehicle fleets are essential to understanding the new phenomena and to help determine if and where they warrant policy intervention -- or, alternatively, where existing policy frameworks must be adapted.

- Within the scope of this project, the OECD/ITF will **characterise** the wide range of **new vehicles** and **emerging services**, identify **policy-relevant metrics** and explore **ways to collect** comparable and continuous **data** on these in order to track relevant trends and inform policy-making.

Objectives of the Project

- Characterise the wide range of new vehicles and emerging services

- Identify policy-relevant performance metrics of the emerging mobility patterns and vehicle fleets

- Explore ways to collect comparable and continuous data to measure the metrics

Task 1: Definitions of the new mobility services and new vehicles

- Overview of the background of the emerging new mobility trends

- Map the current mobility landscape (key players and policies)

- Develop new vehicles and new mobility taxonomy

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New Mobility Services: Definitions

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New Urban Mobility:
Operational Taxonomy
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Ride Sourcing

Owner: Platform
Operator: Platform

A single ride in either a vehicle operated by an employee or contractor of the platform, or in an autonomous vehicle.

Vehicle Sharing

Owner: Platform
Operator: Customer

Temporary access to a self-operated vehicle that is owned by the platform.

Ride Sharing

Owner: Customer
Operator: Customer

A seat on single ride in a privately-owned vehicle operated by another customer of the platform.

New Mobility Services

New Urban Mobility: Operational Taxonomy

Ride Sourcing

TNCs (Passenger Cars)
Uber
DiDi

Microtransit (Buses/Vans)
Via
Swvl

Shared Autonomous Vehicles
Waymo
Baidu

Urban Air Mobility
Volocopter
Lilium

Vehicle Sharing

Bikes/E-Bikes
Docked (Vélib)
Dockless (Citybike)

E-Scooters
Dott
Lime

Road Vehicles
Small cars (Zipcar)
Mopeds (Revel, Y)

Ride Sharing

Carpooling Platforms
BlaBlaCar Daily
CityGo
ZimRide
Rideamigos
Karos

Motorcycle pooling Platforms
RedBus
rPool

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Vehicle Taxonomy

- Seven broad categories with 27 unique vehicle types

- Each vehicle type includes a definition and examples

- Reference: ITF (2020), *Safe micromobility*

Task 2: Development of metrics for the new vehicles and new mobility services

- Define the categories of mobility performance metrics and their policy relevance,
  - Availability, cost-effectiveness, accessibility, reliability, safety, environmental impacts, equity, etc.

- Evaluate the existing mobility performance metrics, their applicability to track the performance of new mobility

- Development of new mobility metrics

Task 3: Recommendations on suitable data collection frameworks for the metrics

- Evaluate if the data needed to calculate the metrics exist and are being collected

- Characteristics of the data (existing and ideal situation)

- What current efforts are being made regarding data sharing and standardisation (e.g. Mobility Data Specification)?

- Develop a data collection framework (public-private collaboration, standardisation, harmonization, etc.)

Our approach

- Understand the current landscape through **desktop research**, **literature review** and **stakeholder consultation**

- Conduct an **expert survey** in July

- Hold an **expert workshop** in September/October

Expert Survey

- Launched on 5 July

- Addressed to:

  ➤ Public sector

  ➤ New mobility service operators

  ➤ Third party data aggregators

  ➤ Transport consultants

  ➤ Mobility as a Service operators

  ➤ Intergovernmental/non-governmental organisations

  ➤ Vehicle manufacturers/original equipment operators

Expert workshops

- 2/3 workshops to be organised in October

- Based on the results of the survey

- Different actors who will share their experiences in collecting and reporting new mobility data

- Understand which metrics are relevant for the analysis of new mobility and how to collect data to calculate them

Thank you

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