

Digital platforms in the mobility sector

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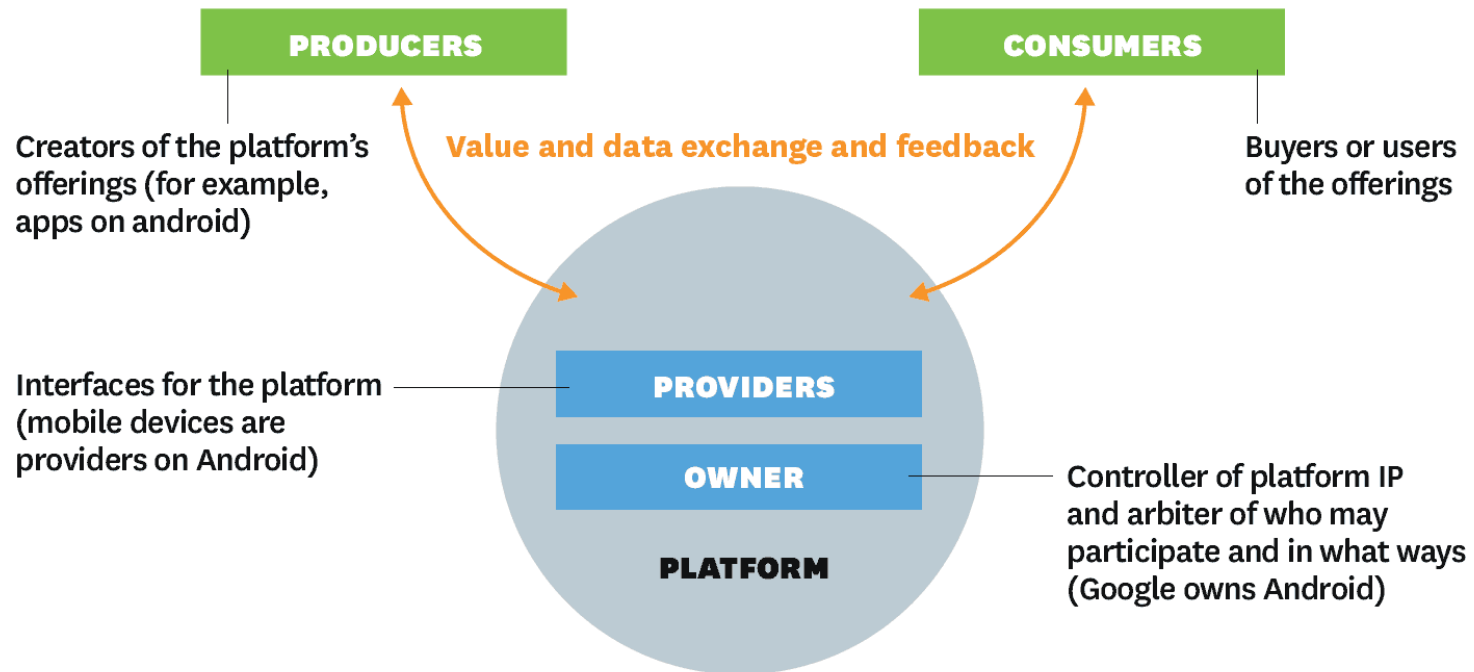
CONTEXT & DISCLAIMER

- This presentation results from a study delivered for the French Ministry for the Ecological and Inclusive Transition (MTES)
- The study was led by *LGI* along with French law firm *Haas & Associés*
 - *A. Monnet, L. Berman, V. Chauvet, P. Benelli, S. Astier*
 - *Also based on LGI in-house research project EVEREST*
- The objectives of the study were the following
 - Uberisation of transport and mobility sectors: how to adapt the regulation without hindering innovation?
 - What are the technologies, business models and legal frameworks in which the digital platforms operate in the sector of transport & mobility?
- This presentation summarises communicable parts of the study

THE MULTI-SIDED PLATFORM MODEL

The Players in a Platform Ecosystem

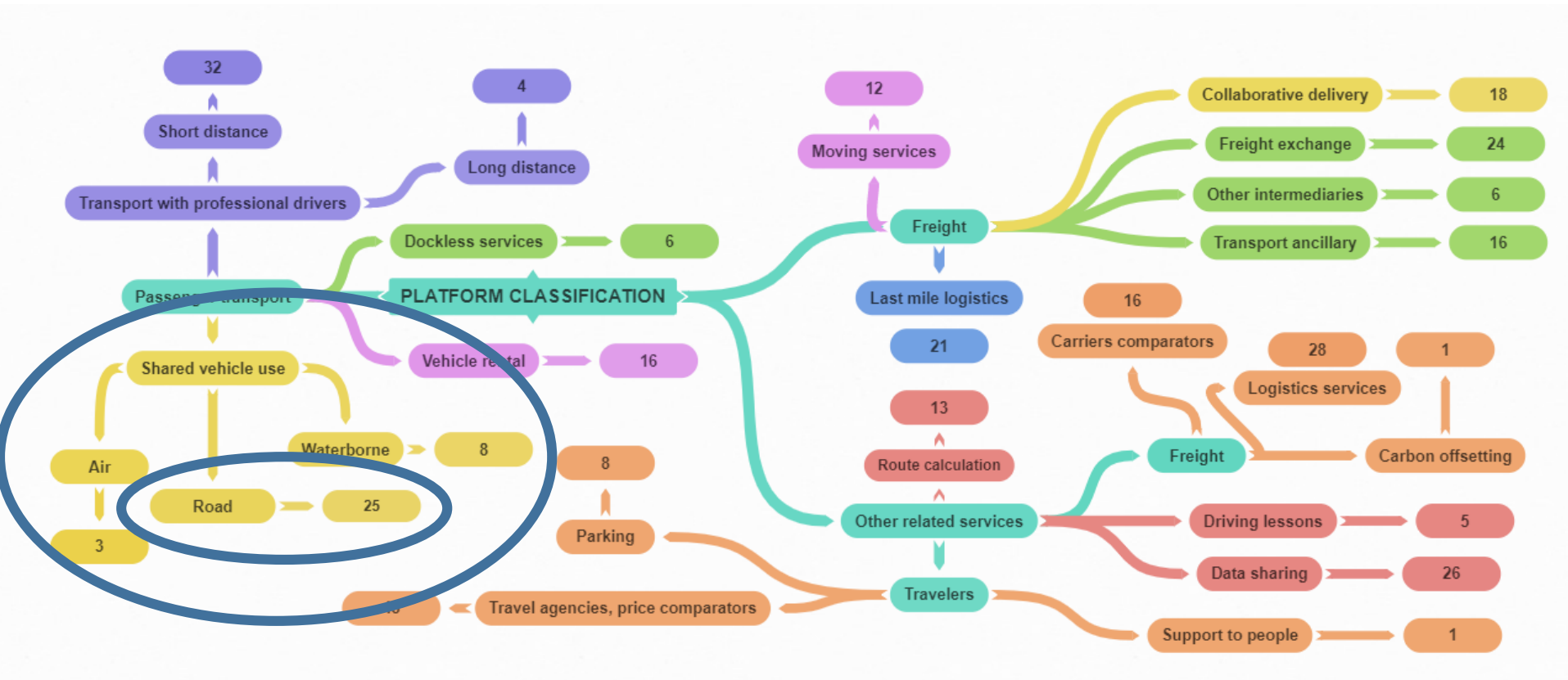
A platform provides the infrastructure and rules for a marketplace that brings together producers and consumers. The players in the ecosystem fill four main roles but may shift rapidly from one role to another. Understanding the relationships both within and outside the ecosystem is central to platform strategy.



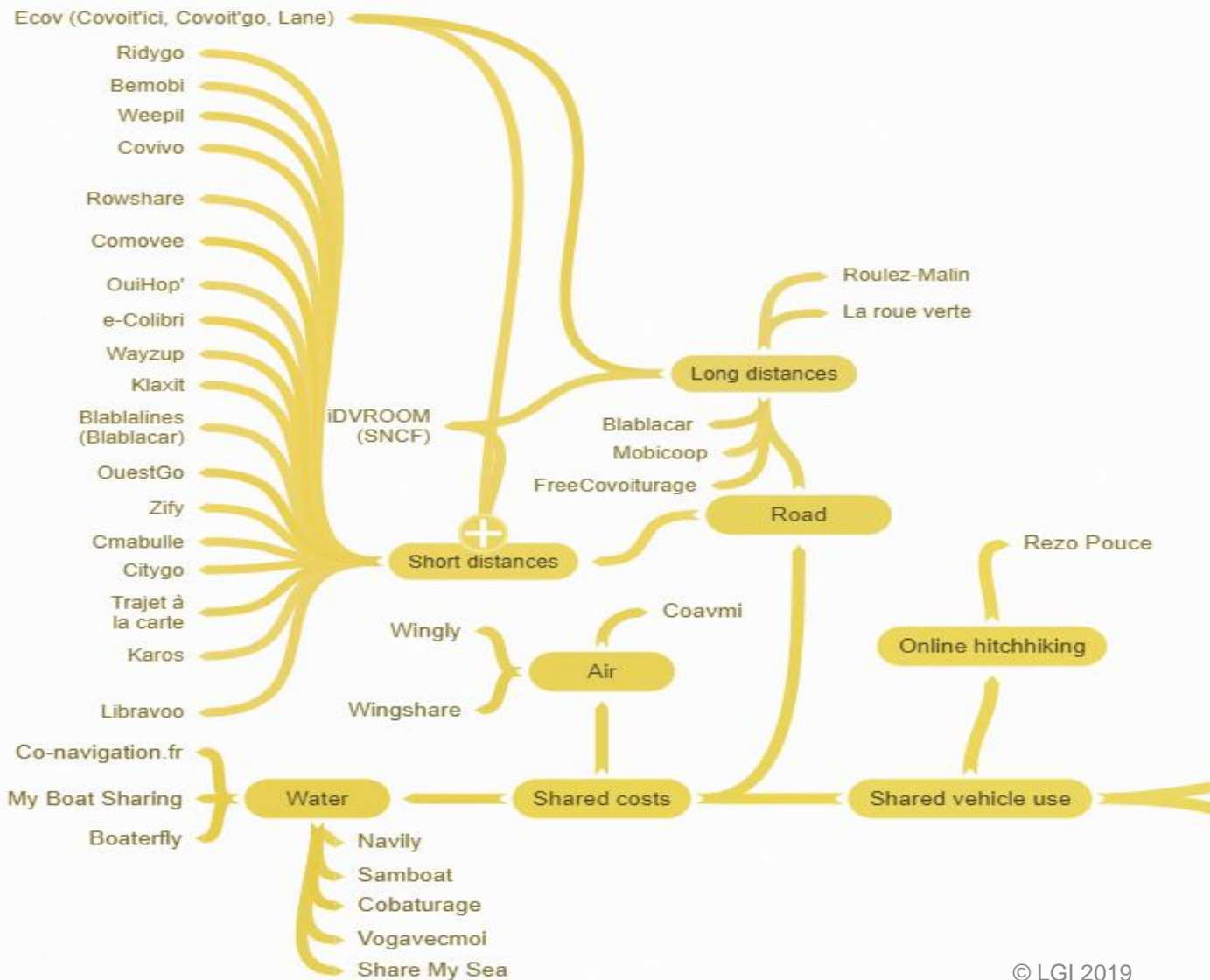
SOURCE MARSHALL W. VAN ALSTYNE, GEOFFREY G. PARKER, AND SANGEET PAUL CHOUDARY
FROM "PIPELINES, PLATFORMS, AND THE NEW RULES OF STRATEGY," APRIL 2016

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316 DIGITAL PLATFORMS ACTIVE IN FRANCE – NOT EXHAUSTIVE



VEHICLE SHARING PLATFORMS

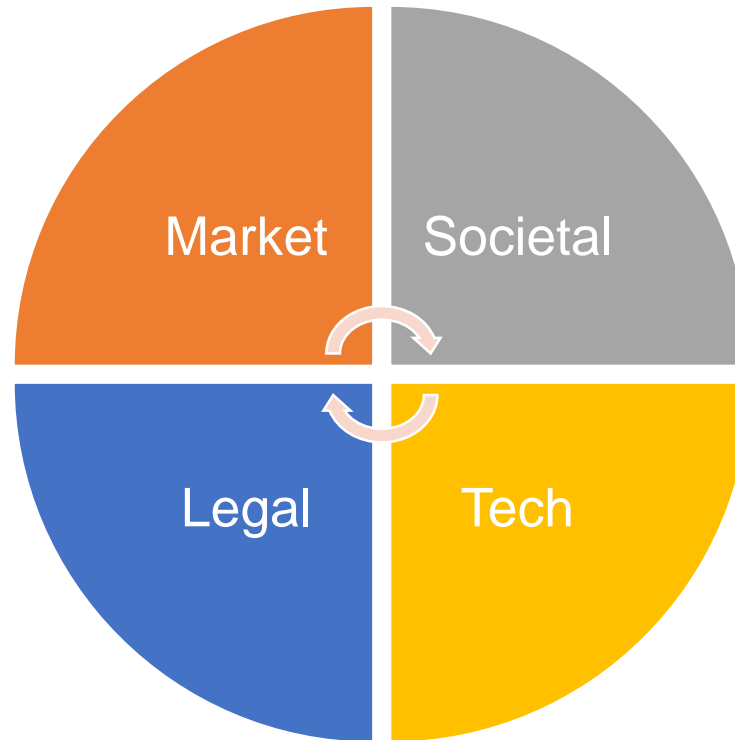


MAIN FINDINGS

1. A fragmented market with niche players
2. A continuously moving ecosystem
 - Startups appear and disappear, pivot regularly, merge to upscale
3. Strong network effects
 - First mover advantage
 - Risk of dominant positions
4. Challenge for regulators to maintain contestable markets
 - Opening data
 - Enabling multihoming

STAKES AND CHALLENGES

- Urban / periurban / long distance mobility
- Multimodality / MaaS
- ITS
- Accessibility
- On-demand



- Environmental impact
- Demotorisation
- Public space occupation
- Addressing territorial unbalance
- Country domiciliation

- Numerous applicable regulations: commercial, social, competition, environmental, IP, GDPR
- Sector-specific regulations: transport operators, intermediaries, and platforms

- Sovereignty
- Open data while respecting privacy + trade secrecy
- Explicability of AI
- Interoperability
- IoT / V2I cybersecurity
- Blockchain

THANK YOU



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