SERVICE PUBLIC FÉDÉRAL
MOBILITÉ ET TRANSPORTS

Attractiveness of MaaS in a B2B context

Survey report

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1. Introduction and methodology

1.1 Description of a "B2B MaaS" mobility service

Innovation and digitalisation have long been key to achieving more sustainable growth. This widely held view has become even more prevalent recently as a result of two challenges that question the very essence of traditional policies: the climate and environment issue, on the one hand, and the coronavirus crisis, on the other. This political shift is manifested in the European ambitions known as the Green Deal and in the lightning-fast use of digital resources to work, learn, shop and relax.

In the field of passenger transport, technological developments and in particular smartphone applications have led to new mobility services. These are often unimodal sharing systems (bicycles, scooters, cars that do not have a fixed station but can be located and unlocked by the next user via their smartphone; or new taxi formulas whose very status is being questioned).

In addition to the technical elements that make such an offer possible, travellers must of course want to use it. An evolution is underway, in which travel is no longer analysed from the point of view of owning a means of transport, but rather from the point of view of mobility as a service, one in which user comfort is key.

MaaS *(Mobility-as-a-Service)*, as part of the B2B offering, is a service that provides employers with a comprehensive package to meet the travel needs of their staff. It consists of at least the following two elements:

- an application allowing workers to organise their trips intermodally (= plan a trip from door to door, make a reservation if necessary, pay and always be able to make changes on the basis of real time information, using several means of transport);
- an internet platform for the employer, with access to the travel data of their workers and the payment transactions (possibly managed by a social secretariat).

As the Federal Public Service (FPS) Mobility and Transport, our ambition is to make mobility sustainable. MaaS has the potential to become one of the keys to meeting mobility challenges in Belgium. This would require a reduction in car use by a single individual (known as "solo-driving"), which still accounts for 65% of home-to-work trips, according to our major three-year survey[1]. Thanks to MaaS, alternatives to the car are becoming more comfortable and user-friendly.

The FPS Mobility and Transport therefore wishes to explore every possibility to ensure the success of such innovative solutions, which respond to the problems of congestion and road safety, and to reduce the negative impact of the transport sector on the environment. The social trends observed, namely a strong growth in workplace flexibility, the increase in part-time work and the alternatives to the company car, such as the mobility budget, are increasing the demand for flexible and tailor-made mobility solutions. As we prepare for society and the economy to recover from the COVID-19 crisis, there has never been a better time to introduce more sustainable models. In this context, we want to encourage innovative mobility services and facilitate their adoption.

[1] Federal Public Service Mobility and Transport (2019). *Federal Commuting Diagnostic 2017*, https://mobilit.belgium.be/sites/default/files/resources/files/final_report_wwv_2017-2018fr_0.pdf

1.2 Survey of mobility experts in companies and public institutions

As part of its survey, the FPS Mobility and Transport wanted to know to what extent and under what conditions companies would be prepared to opt for a "B2B MaaS" mobility service.

The investigation had two components. In June 2020, a questionnaire was sent to mobility experts within companies. We then held two focus groups in early March 2021.

In the **survey**, ten questions were asked about the opinion of the respondents, focusing specifically on the usefulness (interest, added value) of MaaS for their company or organisation. It was conducted online in June 2020.

For the address file, we called on our colleagues in the Research and Surveys Department. Every three years, it organises a survey of companies and public institutions in Belgium with an average of more than 100 employees. These companies and public institutions were surveyed about the commuting habits of their employees. The most recent information collection took place between 1 July 2017 and 31 January 2018 (the 2020 survey was delayed by one year due to the COVID-19 crisis)[2]. 3,951 different employers participated.

Approximately one-third of these employers indicated that they could be contacted for further surveys, which was the starting point for our survey. However, after almost three years, it turned out that the address file was no longer very up-to-date and we also received many absence messages during the month of the survey. Probably just over a thousand people received our collaboration request, but we are not talking about a thousand single employers, because there were sometimes several contact persons for the same organisation. In addition, June 2020 was undoubtedly a difficult month for some organisations due to the COVID-19 crisis. Nevertheless, 84 respondents (single employers) completed our survey in full. This survey, like the large-scale triennial survey of our colleagues, was usually completed by the *mobility manager*.

If we now profile the participants, we find that 37 are from the private sector and 46 from the public and non-profit sector (one participant is unknown). This last category will be referred to as the "public sector" below, but it is important to note that the organisations involved are very diverse (see Table 1, below). They include a public transport company, universities, federal, regional and local government services, schools and social welfare institutions. They therefore vary considerably in terms of size and activities, which is reflected in the size of their workforce.

Of all the employers participating in the survey, nine have more than 1,000 workers and eleven have fewer than 100 workers (an unexpected result given that the sample consisted of organisations with more than 100 workers, but which can be explained both by fluctuations over time and by the fact that, in some cases, only one establishment was counted even though the organisation operates in several locations). In presenting the results, with regard to the size of the organisation, we will break them down into those with fewer than 200 workers and those with more than 200 workers. In the survey, there are 33 organisations with more than 200 workers and 41 with fewer than 200 workers (data unknown for 10 employers).

In addition, we will sometimes refer to the population density of the settlement area. This information is relevant because, in general, higher density areas, i.e. city centres and their immediate surroundings, are less easily accessible by car, but have a better service and better infrastructure for alternative means of transport. The

[2] The 65% figure quoted above is taken from this survey. For more information: https://mobilit.belgium.be/fr/mobilite/domicile_travail

breakdown of our respondents is as follows: 37 are in a dense area[3] and 36 in a less dense area (density unknown for 11 employers, sometimes due to the presence of different sites).

	Business sector	Number
PRIVATE SECTOR	Industry	9
	Wholesale and retail trade; repair of motor vehicles and motorcycles	7
	Financial and insurance activities	4
	Specialised, scientific and technical activities	4
	Construction	3
	Production and distribution of electricity, gas, steam and air conditioning	2
	Transportation and storage	2
	Information and communication	2
	Administrative and support service activities	2
	Other	2
	SUB-TOTAL	**37**
PUBLIC SECTOR	Public administration and defence; compulsory social security	18
	Teaching	14
	Human health and social work	10
	Water production and distribution; sanitation, waste management and remediation	1
	Transportation and storage	1
	Information and communication	1
	Specialised, scientific and technical activities	1
	SUB-TOTAL	**46**

Table 1: Breakdown of respondents by sector of activity, by private or public sector (N=83 plus one unknown)

In early March 2021, we brought together a number of interested parties. Naturally - and much to our regret - this had to be done online, given the circumstances. Based on the results of the survey, we canvassed the participants' opinions to get a better idea of the reasons and motives behind the answers given in the survey. As is customary in **focus groups**, the number of participants was limited so that they had ample opportunity to express their opinions and discuss the issues among themselves.

Our participants were people who had indicated in the survey that they wished to take part in such a discussion and who could make themselves available at a time convenient to the majority. One group consisted of eight Dutch-speaking participants and the other of nine French-speaking participants. Not surprisingly, the participants were mainly from large companies. Both the size of the company and the private sector (in fact, it was mainly companies

[3] The DEGURBA index was used to differentiate responses according to the density of the locations of the different companies participating in the survey. This index differentiates between geographical areas according to their density. These are classified according to three categories:

- Code 1: densely populated area (Antwerp, Brussels, Bruges, Charleroi, Kortrijk, Ghent, Liege, Leuven, Mons, Namur and Ostend)
- Code 2: Intermediate density area
- Code 3: thinly populated area

The geographical areas were determined on the basis of the location of the municipality (NIS code)
For the sake of representativeness, in this survey categories 2 and 3 have been combined into a single category, namely "less dense area".

that participated, while there was little participation from the public and non-profit sectors) are important here, but this will become clear below when reading the results.

2. Result of the survey

2.1 The content of the B2B MaaS offer

The first question in the MaaS survey was aimed at evaluating which transport services it would be useful to integrate into a B2B offer. Public transport would be the backbone of such an offer and so would automatically be part of the services offered. We have compiled a list of thirteen possibilities, which are listed below. It should be noted that "group transportation organisation" refers to a customised solution offered by the company. These include staff-only bus services, for example. Electrically powered vehicles belong to the category of micromobility, such as electric scooters, which are now popular in some large cities.

We first present the general results for this question and then differentiate them according to the size of the company surveyed and the density of its location.

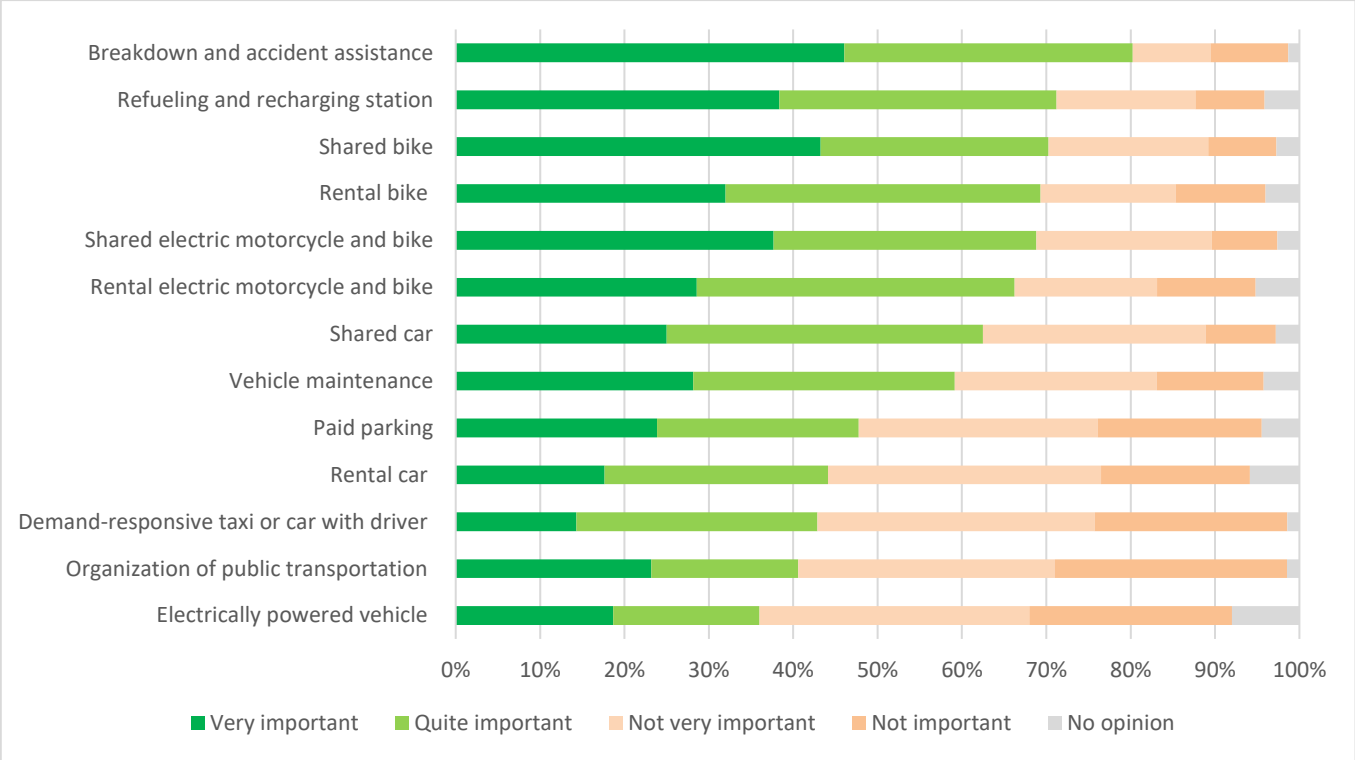

Figure 1: The proportion of survey participants who attach importance to certain potential transport services (in addition to public transport) to be included in a MaaS offer

When asked about the transport services that it would be useful to add to this offer, breakdown/accident assistance and refuelling and recharging stations come out first. Indeed, breakdown assistance was of interest to 80% of participants, 46% of whom rate this service as very important to add to the offer. Refuelling stations were of interest to 72%. We can see the success of these services, which were originally dedicated to cars but can also be useful for (electric) bikes. They are very relevant in the context of mobility as a service that frees the user from certain burdens. This service goes further than simply providing a means of transport.

There is also a lot of interest in bicycles, whether they are shared, rented or electric. These solutions were rated between 60 and 70% important by the interviewees. Bike sharing in particular was considered very important by 43% of respondents and electric bike sharing by 37%. According to the focus group participants, favourable tax treatment for some bicycle offers may explain the success of these solutions. There are few or no such advantages for scooters, for example. Companies also like these solutions because they give them a "greener" image. They also attract environmentally aware workers.

Secondly, we also found that there was a more limited demand for chauffeured transport services such as taxis and company-organised group transport. This can probably be explained by the fact that these services are more expensive, and if they are collective, are of greater interest to larger firms or at least to organisations where sufficient groups of workers share the same schedule. Nevertheless, more than four in ten respondents expressed interest in these solutions, indicating the potential for a niche market.

In the focus groups, the mobility managers of different companies explained the success of breakdown and accident assistance by the fact that reliability and safety are important factors for employers and employees alike. "*There is a greater chance of using a mode of transport when assistance is provided*", explained a mobility manager of a paint company. This is also the argument that explains the low success of electrically powered vehicles, which are associated with a lack of safety, particularly because of the accidents they experience. 49% of respondents consider it of little or no importance to add this service to the offer. Some transport services are indeed blocked by employers on the advice of their insurers, pointing out that scooters, and sometimes even bicycles, are more accident prone. "*This poses problems of liability in particular*," explains a participant in the discussion groups, who works in the agri-food sector. Some companies offer training to their employees so that they can use certain modes of transport, such as pedelecs (electric bikes), more safely.

Companies want the possibilities to take into account the entire journey of the employees, which explains the importance of the first and last kilometres. "*Employees want parking solutions for the first few kilometres from home to the station. Car sharing or other solutions can be interesting for the last few kilometres from the station to work*," explains a mobility manager working in the energy sector. Parking at the station is a popular solution for workers, but it often involves long queues and high costs.

Breakdown by organisation size

Survey participants were asked to judge the importance of the different modes of transport to be added to a B2B MaaS offer. For each mode, they could indicate whether it was "not important", "not very important", "somewhat important" or "very important". These responses were then translated on a scale of 0 to 3, with 0 indicating that the service is not important and 3 expressing that it is very important. The graph above shows the average scores obtained by each mode and thus allows us to evaluate participants' interest in the various mobility services to be integrated into a B2B MaaS offer. These results are classified according to the size of the companies (more or fewer than 200 workers).

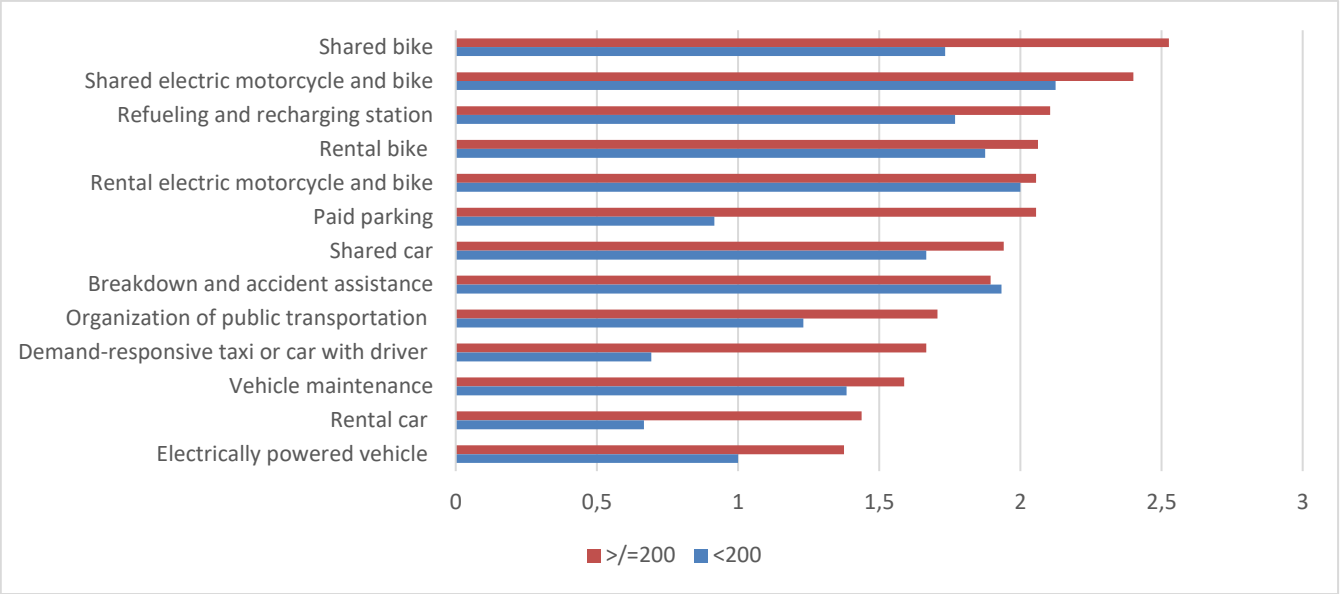

Figure 2: The importance given by participants to the different mobility services to be added in a MaaS offer (scale of 0 to 3), according to the size of the organisation

When differentiating between large and small companies, it can be seen that companies with more than 200 employees show greater interest in almost all the different means of transport proposed for the B2B MaaS offer. The most significant differences can be seen between the interest of small and large companies in paid parking, taxis or cars with a driver, and rental cars. One focus group participant explained this by the fact that it is more difficult for smaller companies to have a mobility manager and develop a real mobility policy. This is an administrative burden. Another participant added that "*the price of MaaS solutions is high at the moment for medium-sized companies*. There is also a greater difference in interest between small and large companies in solutions that tend to be more expensive.

A second observation is the success of bicycle solutions, which is even more pronounced than in figure 1, particularly among large companies. The average score for bike sharing is just over 2.5 out of 3, and the average score for electric bike sharing is 2.4. The latter solution is very popular with small businesses, however, with a score of 2.1.

Breakdown according to the population density of the area in which the organisation is located

When responses are differentiated according to the density of the locations of the various companies participating in the survey, on average, respondents in densely populated areas have a greater interest in all of the solutions proposed for the B2B MaaS offer. One focus group participant explained that "*less dense areas are currently underserved, there are not many alternatives to the car. When services such as sharing solutions are extended to these areas, smaller cities will use them*.

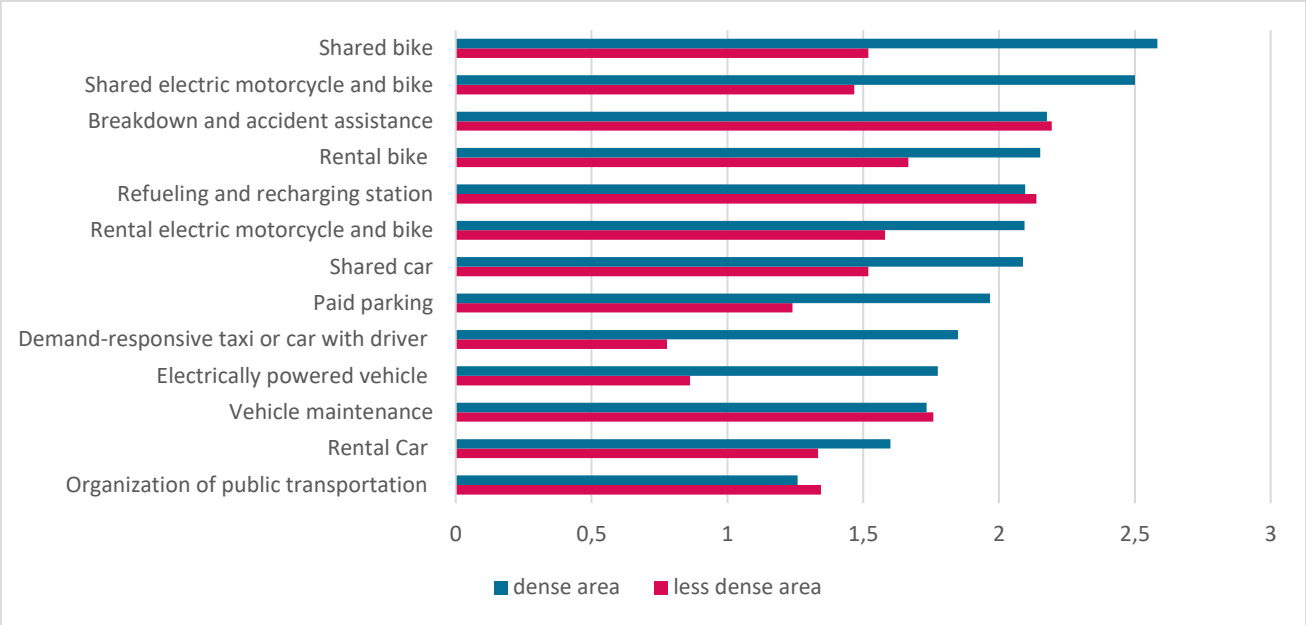

Figure 3: The importance given by participants to the different mobility services to be added to a MaaS offer (scale of 0 to 3), according to the density of the organisation's location

It can be seen that bike sharing is considered very important, with an average score of 2.5 in dense areas, compared to 1.5 in less dense areas. For shared electric motorcycles and bicycles, there is a difference of 2.5 to 1.5 between zones depending on their density.

The graph above also shows a significant difference for micromobility solutions such as electric scooters, with 1.8 compared to 0.9. These are less interesting for less dense areas where the distances to be covered are generally greater and these means of travel are less available.

2.2 Companies' motivations for joining a B2B MaaS offer

A second question aimed to evaluate the reasons that would motivate a company to join a B2B MaaS offer. The results were again evaluated on a scale of 0 to 3. A 0 indicates that the reason is unimportant, while a 3 indicates that it is very important to the respondents. Generally speaking, we can conclude that organisations show an interest in subscribing to a B2B offer for all the proposed reasons. In fact, in the graphs that follow, if we differentiate the responses according to the size of the company and the density of the city where it is located, we can see that all the responses are greater than 1.5 out of 3.

Breakdown by organisation size

Offering the widest possible choice is important to employers. On average, interest is rated at 2.8 out of 3 for large companies and 2.3 for smaller ones. However, in the focus groups that followed the survey, the various participants made it clear that this must still be financially viable for the company. One participant explained that, "*to offer a means of transport, you need a minimum number of users*".

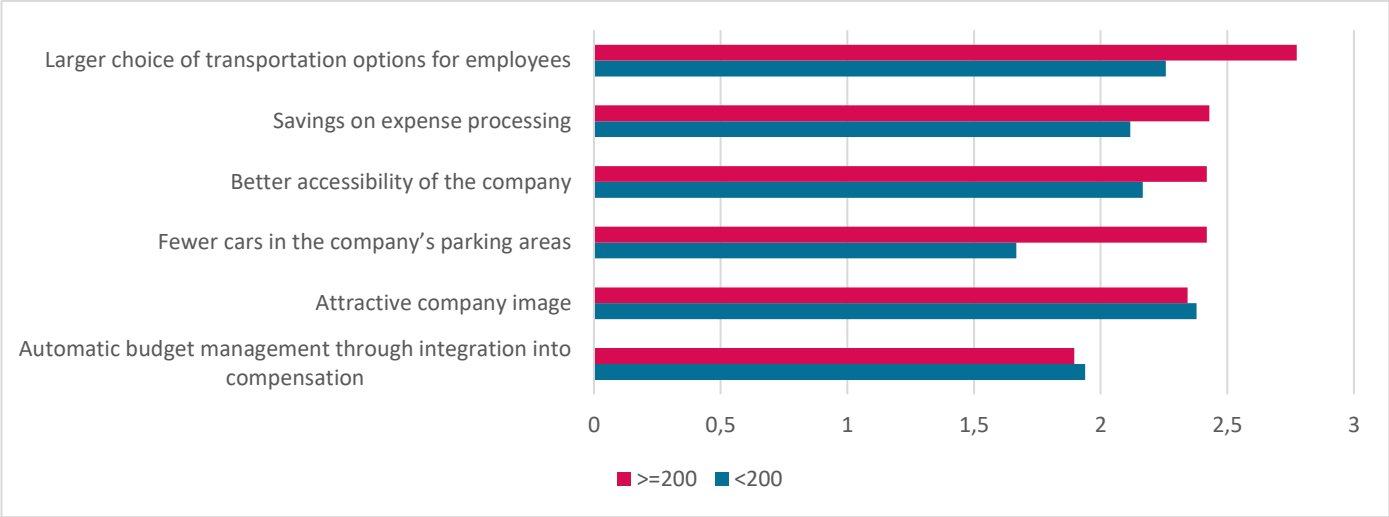

Figure 4: Rating of interest in the different reasons for offering MaaS to employees, according to the size of the organisation (scale from 0 to 3)

For companies with fewer than 200 employees, the main reason for offering B2B MaaS to their employees is the attractive image it will give their company, with an interest of 2.4 out of 3. We also notice that for the largest companies, the fact that there are fewer cars in the car parks is a more important motivation (2.4 compared to 1.7 for the smallest companies).

Breakdown according to the population density of the area in which the organisation is located

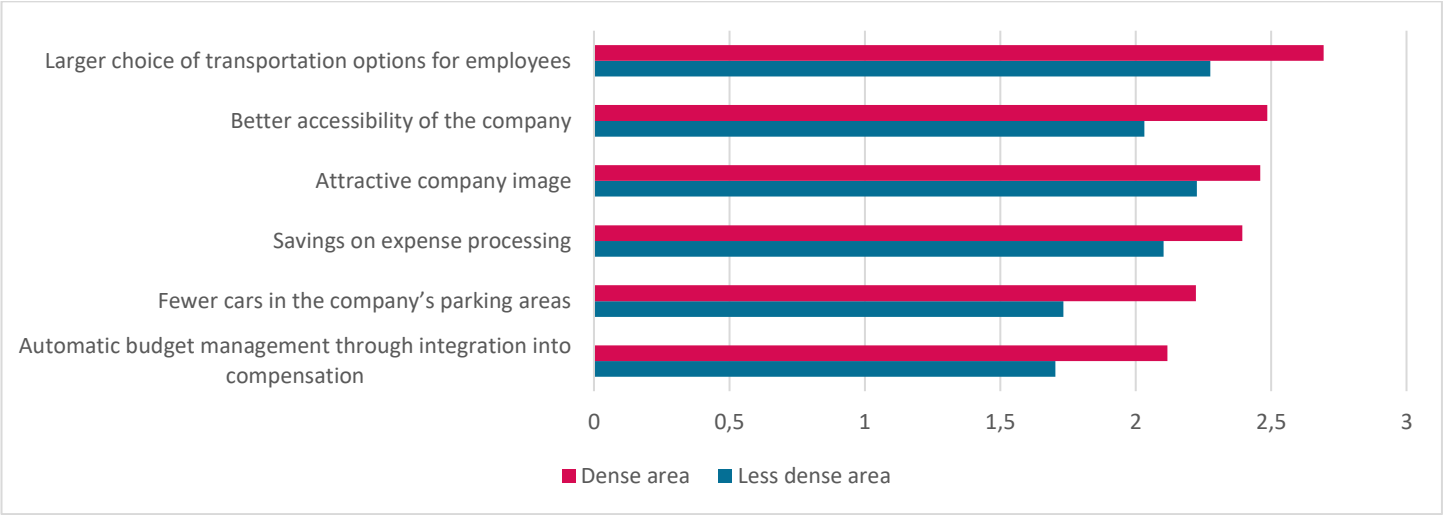

Figure 5: Rating of interest in the different reasons for offering MaaS to employees, according to the size of the organisation (scale from 0 to 3)

Taking all the reasons into account, employers in denser areas are generally more enthusiastic about signing up for a B2B MaaS offer. This is again because these areas are more accessible and already have more alternatives to the car, such as different kinds of car-sharing.

In this light, we would expect the motivation to reduce the number of cars in organisations' car parks to be higher for those located further from city centres, as a greater proportion of workers drive to these locations. However, their location may also allow them to have more parking space.

Feedback from focus group participants

Focus group participants mainly emphasised the desire to ease the administrative burden of providing flexible transportation to workers. This is one of the main reasons why they are interested in outsourcing solutions, in which a package is completely managed by a third party. They also added that these solutions accelerate digital evolution. Some would like to be able to integrate a MaaS application into their administrative software system. "*An integrated system must be used, and this should even be part of a larger framework than mobility*," adds a mobility manager from a consultancy company.

During these discussions, participants agreed that the most important thing is to offer flexibility to employees. Indeed, with the different household compositions, as well as teleworking, which has become more widespread since the COVID-19 crisis, the solution must be able to correspond to the different situations and needs of employees. For example, fare flexibility should be increased and tickets should be preferred to subscriptions. However, for the time being, their price has not been adapted. Furthermore, flexibility is currently correlated with the administrative burden and may discourage companies from considering this kind of solution. "*We need simplicity for employees and also for employers,*" explained a mobility manager from the broadcasting sector, in agreement with the other participants.

2.3 Important criteria in a contract

The survey then aimed to identify which criteria are important to a company when subscribing to a B2B MaaS offer.

Criteria	Ranking 1	Ranking 1 or 2
Cost price	38%	61%
Focus on sustainable mobility	23%	42%
Administrative workload, management and traceability of the budget	18%	38%
Volume of the offer	10%	31%
Experience and reputation of the provider	4%	11%

Table 2: Percentage of respondents ranking the criteria that should be included in a contract with a MaaS provider as first or second in importance

The price of the contract is the most important criterion, with 38% of participants ranking it first and 61% ranking it first or second. As mentioned earlier, it is important for companies that the offer does not exceed a certain cost for the company. A focus group participant working in the insurance sector explained that, in her opinion, "*the price of Maas solutions is high at the moment and they do not yet include the means of transport that a company can provide.*"

The focus on sustainable mobility is the second most important criterion for evaluating a contract, with 42% of participants ranking it in first or second place. This could be linked to the motivation, mentioned in the previous question, to subscribe to a MaaS offer in order to improve the company's image. A participant in the conversation from a company that provides sustainable electricity in particular explained that "*this is a criterion that employees are increasingly looking for when job-hunting*."

Secondly, the volume of the offer, including the possibilities proposed in the first point, does not appear to be a priority when evaluating the contract. For 10% of the participants, it is the most important criterion and for 31% it is the most important or second most important. This may seem counter-intuitive to the answer to the question of why companies would enter into such a contract. Organisations want to offer their employees as much choice as possible. However, as mentioned above, increasing flexibility could result in additional costs. However, it can be argued that a MaaS offer would expand the possibilities compared to the current situation.

A mobility manager from a bank adds that she would first like to be able to integrate the company's existing mobility offer into an easy-to-use tool and then possibly expand the offer. Another participant from the broadcasting sector said that, "*Once you give employees a car, it's hard to add anything else. The cost of the company car remains the same (possibly some fuel savings), plus the cost of the bicycle, etc. Also, sometimes when the employee uses the bike, the car may be used by another family member and the costs add up.*"

A mobility manager already working with a MaaS solution explained that in her company, she has seen a decrease in the number of kilometres driven by cars, in favour of other modes of transport they have made available for their employees to try out, notably leased bicycles.

Finally, the provider's experience is the criterion ranked last among those proposed. Only 11% of participants would rank it first or second. This can probably be explained by the fact that it is a relatively new market. Focus group participants added that there is not much choice of MaaS providers at present. They are therefore looking primarily for solutions that meet their needs and are not too expensive.

2.4 Employee interest in using a MaaS system

In the next part of the survey, participants were asked to rate the willingness of employees to use this system on a scale of 1 to 5. This is therefore an estimate by mobility managers of the interest of staff members and not a direct response from the latter.

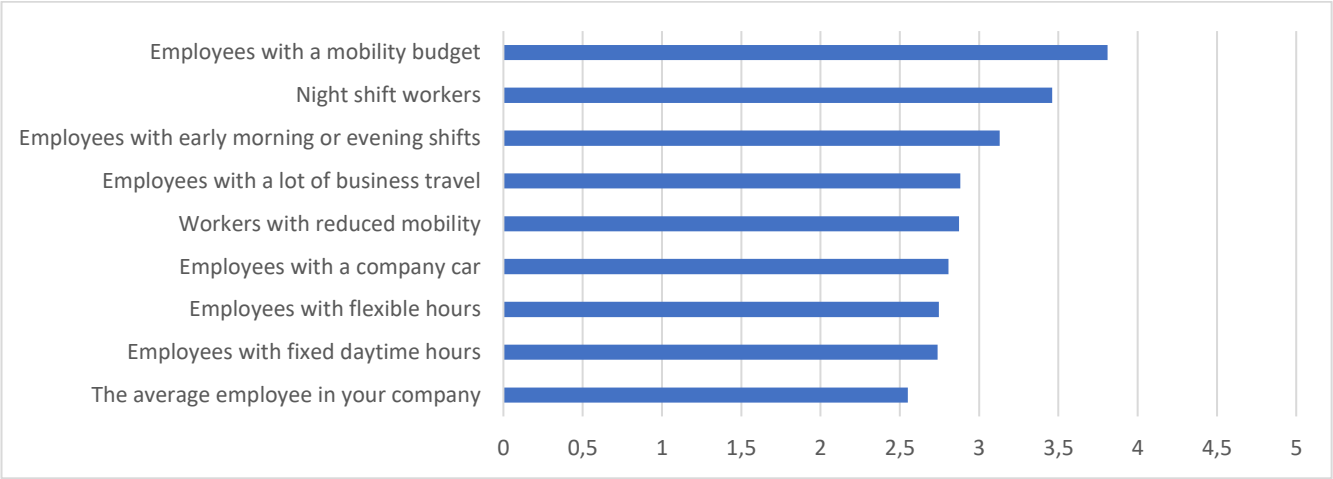

Figure 6: Estimated employee interest in using a MaaS offer, based on their work regime (scale of 0 to 5)

An initial observation is that all the proposals obtain, on average, a score higher than half. This means that, according to the survey respondents, individual employees would be interested in using a MaaS system. Secondly, the solution would be particularly interesting for employees with a mobility budget (3.8/5), those working night shifts (3.5/5) and those working early or late hours (3.1/5).

The mobility budget was often mentioned in the focus groups that followed the survey. This is the possibility of exchanging a company car or the right to it for an equivalent budget to be shared between a more environmentally

friendly vehicle, means of transport and accommodation costs and/or financial compensation[4]. Respondents believed that a MaaS solution could relieve them of the administrative and logistical management of the mobility budget. Because of the flexibility of the mobility budget, especially in the choice of means of transport, it is indeed a system that can easily be combined with the B2B MaaS offer, making companies with a mobility budget an obvious target group for MaaS applications. One company participating in the focus groups and with a MaaS application and a mobility budget explained that, "*It encourages employees to use other modes of transport. It's important to have several possibilities and ease of application*."

When the various responses are ranked in order of increasing interest, the average employee in the company comes last with 2.6, which is still more than half. This could be explained by the fact that the average employee is already satisfied with the existing offer, i.e. train, bicycle, parking at the station, among others, already offered by some companies, as pointed out by a focus group participant. MaaS would be of interest to workers who need more customised services.

Breakdown by private or public sector

The result of 2.8 out of 5 for employees with company cars may, however, be underestimated as the public sector rarely offers this possibility. Indeed, when we make the distinction, we obtain a score of 3.4 for the private sector and only 2.2 for the public sector. Private companies participating in the focus groups explained that employees with company cars would be interested in being able to use a MaaS application when they need to travel in the city centre, for example.

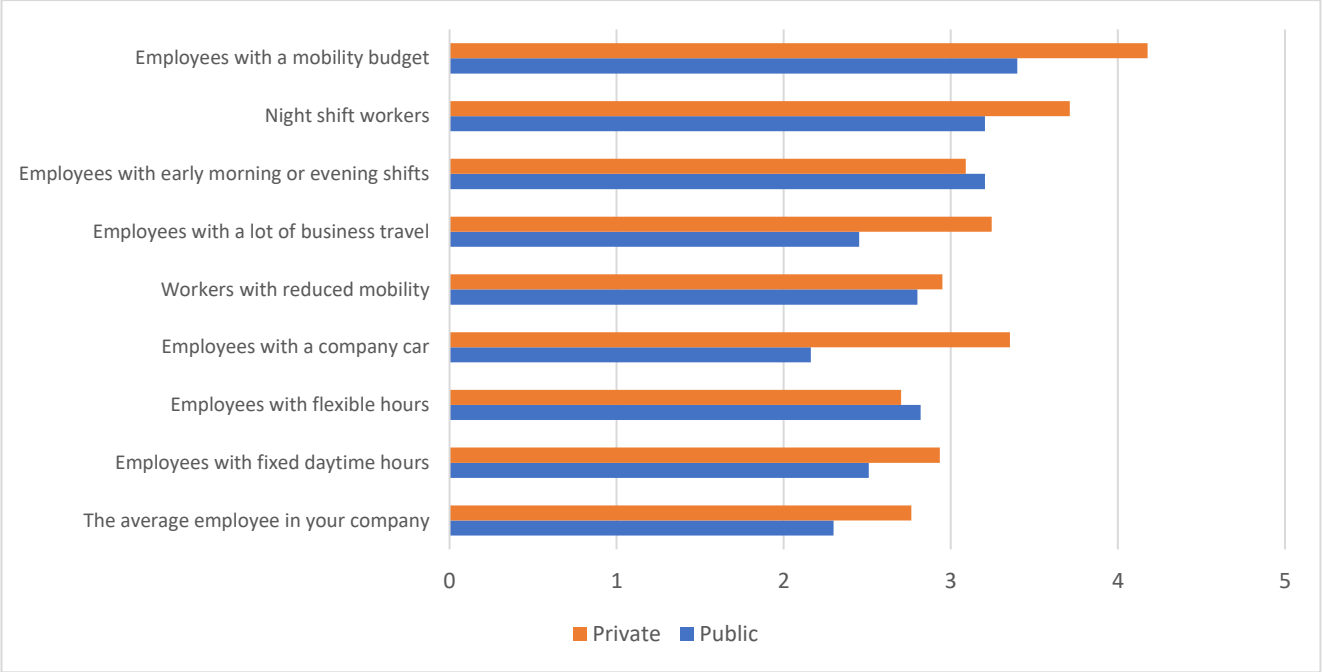

Figure 7: Estimated employee interest in using a MaaS offer, based on their work regime and the sector of the organisation (scale of 0 to 5)

[4] The mobility budget was introduced by the Law of 17 March 2019 on the introduction of a mobility budget. Experts from the Federal Public Service Mobility and Transport have helped to define the alternatives for more sustainable mobility offered to company car owners. For more information, see https://lebudgetmobilite.be/

2.5 Reasons for employees to use a MaaS solution

When companies were asked to evaluate the reasons why their employees might use a MaaS solution, it was observed that, on average, all the proposals were of great interest to respondents. All the responses were over 2 out of a total of 3. There was also little variation between the different results. This means that all the proposals seem relevant. A MaaS application should be a flexible, affordable and user-friendly solution to achieve the goal of smoother and more sustainable commuting.

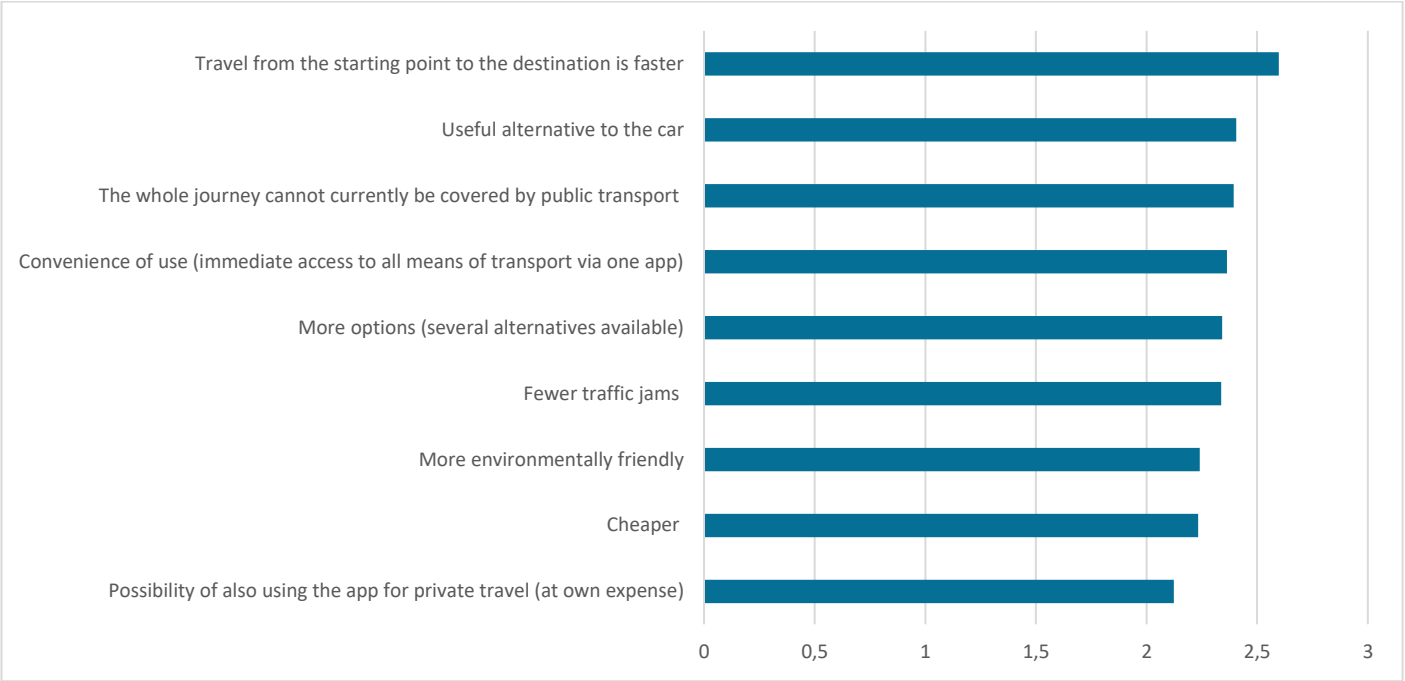

Figure 8: Reasons why workers would use the MaaS offer. These were rated on a scale of 0 to 3 by the respondents.

The focus groups revealed that the reasons for use vary for each employee. Firstly, a mobility manager from a paint materials company explained that she saw a difference in mobility needs between the generations. According to her findings, young people are generally more inclined to change their habits to opt for more environmentally friendly solutions. This was a view shared by several participants. One participant working in human resources at a broadcasting company explained that, "*The new generation is generally more willing to have a less expensive car and combine it with other flexible means*."

Identifying the needs of employees is essential when choosing a MaaS solution for a company. The need to move because it's healthy is, for example, something that a MaaS application with possibilities such as cycling could address. There are therefore many different needs which vary over time. This is why solutions must be flexible. This flexibility is even more necessary in view of the impact of the COVID-19 crisis in terms of teleworking and flexitime proposals.

Furthermore, an insurance company explained that, "*The changes in infrastructure that are currently taking place, and the increase in parking prices, will make the car a less attractive choice and will force people to change their mode of travel and companies to change their offer.*"

2.6 Willingness to offer or test a MaaS solution with employees

The survey then looked at employers' interest in introducing MaaS mobility services to their employees or launching a pilot project with some of them. This interest is evaluated on a scale of 1 to 5. The table below first shows the average results for all participants. It then differentiates these results according to the sector (public or private), as well as the size of the companies surveyed (more or fewer than 200 employees). Finally, it breaks down the results according to the density of the company location.

	Average Total	Sector		Company size		Density	
		Public	Private	<200	>=200	Dense area	Less dense area
Interest in introducing MaaS mobility services to their employees	2.9	2.7	3.1	2.6	3.3	3.4	2.4
Interest in launching a trial project for some employees	2.6	2.2	3.1	2.3	3	3.1	2.1

Table 3: Willingness to introduce or test a MaaS solution with employees, based on sector, size of organisation, and the population density of the company location (scale of 1 to 5)

First of all, when we look at companies' interest in introducing MaaS mobility services to their employees, we see that the overall results are above 2.5 out of 5. This shows a positive interest in this first question. It is higher for the private sector (3.1) than for the public sector (2.7), for large (3.3) than for small companies (2.6) and for more densely populated areas (3.4). One reason for this is that the private sector can offer more resources - including cars - to their employees in terms of mobility solutions. As mentioned earlier, this is also the case for large companies. Finally, denser areas have greater accessibility in terms of public transport and other mobility solutions, which makes the MaaS offer more attractive.

When we then look at companies' interest in launching a pilot project with some of their employees, this result is less than half for the public sector (2.2), smaller companies (2.3) and less dense areas (2.1). This may be due to the same reasons as mentioned in the previous paragraph.

There are also sectors where the conditions are not favourable to the use of MaaS solutions. The company car is sometimes a work tool and is used to travel to customers or to transport equipment, for example in the construction sector. In these cases, the car remains essential for companies and cannot necessarily be replaced by a MaaS offer.

Usefulness of testing before wider deployment

However, what is striking in these results is the difference between interest in introducing mobility services and interest in launching a trial project. Indeed, when comparing the results for these two questions, we can see that public organisations prefer, on average, to directly present the possibility of a MaaS application to their employees rather than launch a trial project. One factor that may explain this difference of 0.25 on average is the strong growth in teleworking following the COVID-19 crisis. As the survey was conducted in June 2020, this may have impacted

the responses of those interviewed. This does not seem to be a good time to run a pilot project. This difference does not exist for the private sector.

However, these results should be considered with caution as some companies may have rated an interest of less than 2.5 to express the fact that they are already working with a MaaS solution and therefore no longer need to introduce the concept or pilot it within their organisation.

This was the case for two focus group participants. The first, a mobility manager from a company in the energy sector, explained that the test allowed them to identify the expectations of their employees. They concluded that their employees were more interested in a payment card with a certain budget rather than a route planner-type application. Another participant from a company providing human resources services added that, "*Giving employees the opportunity to test several alternatives to the car allows them to take an interest in these other modes*."

2.7 Policy options for public authorities

The last question in the MaaS survey was aimed at assessing the opinion of the respondents on policy measures that could be taken to promote the development of this concept in Belgium. It should be noted that this was a survey carried out by the Federal Public Service, but that the measures are the responsibility of the various levels of government, including the local level.

All the measures have a positive rating of more than 2 out of 3 (see Figure 9 below). There is little variation between the results, which means that the measures appear to be relevant overall. The three measures that were considered most important, however, were providing a favourable tax framework, making alternatives to the car in the mobility budget more attractive, and improving mobility hubs and interchange infrastructure (P+R bicycle parks). These three measures scored approximately 2.7 out of 3.

Focus group participants agreed on the need for a simple, consistent and transparent tax framework. Some stressed the need to reduce the tax attractiveness of the car. Others reacted by saying that it was important to keep the salary package competitive. Some also added the importance of having a solution that is accessible to as many people as possible.

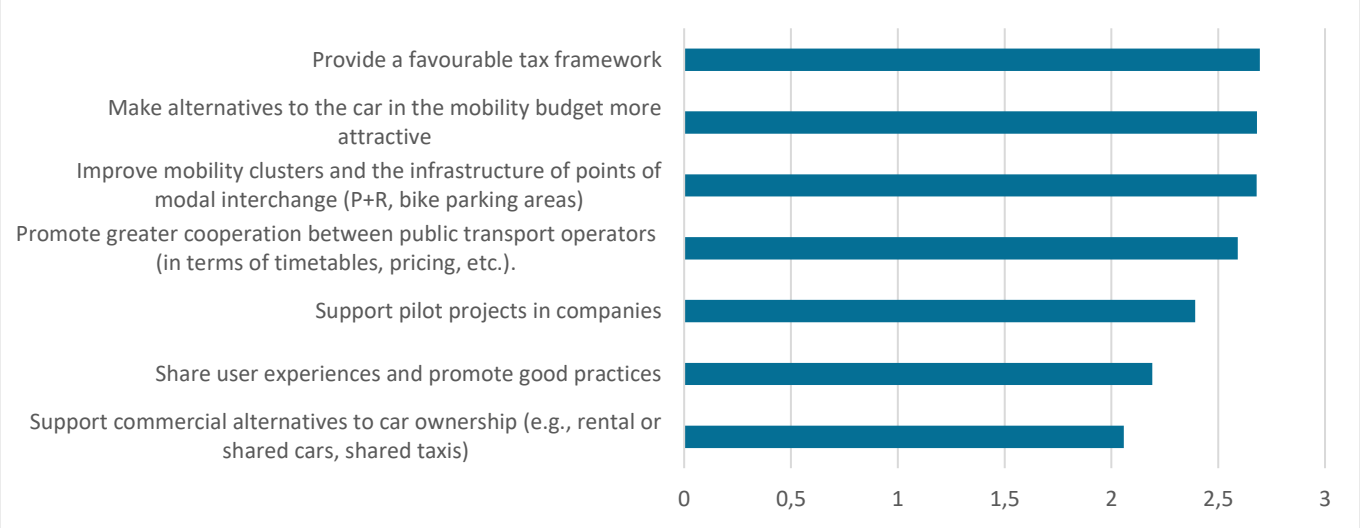

Figure 9: Respondents' interest in potential government action to stimulate MaaS (scale of 0 to 3)

Secondly, one focus group participant explained that, "*it is important to attract the user with infrastructure and by adapting the rules of the road*." A participant from the insurance sector added that, *"attention should be paid to the fact that being able to travel properly and safely still seems to be a problem*." We received similar comments for the open-ended survey question. Attention is drawn to the fact that sustainable means of transport need appropriate accompanying measures, e.g. better cycling infrastructure.

When discussing the attractiveness of alternative modes to the car, participants stressed the need for complementarity between the different modes to encourage multimodality and reduce travel times. They also focused on fare flexibility in order to offer formulas such as the Brupass XL, recently introduced by the four Belgian public transport operators in Brussels and the surrounding area, and the possibility of buying 100 journeys rather than a season ticket, recently introduced by the STIB.

3. Conclusion

Although the participants in the survey represent several tens of thousands of workers, our survey does not aim to be representative of all Belgian employers. In any case, in principle only organisations with 100 or more staff members were surveyed, and these are probably mainly large organisations where a member of staff can devote sufficient time to mobility issues and therefore also to such surveys. Moreover, such a survey may be of interest mainly to those who already support innovative and more sustainable mobility solutions.

Nevertheless, there is a great willingness to work on alternatives to commuting by car. Even though the respondents have very different professional contexts and work situations, they share the desire to reduce the proportion of home-to-work trips made by cars without passengers. There are different ways to implement these alternatives: some participants do not need MaaS solutions and rely on the direct promotion of sustainable transport modes. Depending on factors such as the industry and location of the organisation, B2B MaaS offers an appropriate solution.

Without promoting or explaining further, a small majority of participants responded favourably to the possible application of a MaaS offer in their organisation. That is a lot for an innovative concept, even if the ground has probably been broken by the mobility budget. In addition, some of the participating companies are already using a MaaS offer. This favourable attitude can be seen when asking directly whether participants are willing to introduce such a system into their organisation and when asking about the presumed interest of the employees, but it can also be seen indirectly through the wide range of transport means and mobility services to be integrated into the MaaS offer. Our survey confirmed that MaaS has the potential to be a tool for promoting fluid and more sustainable mobility through an affordable, comfortable, flexible and easily accessible intermodal transport offer. If we take a good look at the mobility services that exist in addition to transportation, what characterises MaaS is that everything needed to get around can be part of the package, including refuelling or recharging vehicles, breakdown assistance and replacement in unexpected situations.

These examples also show that MaaS can be used not only to replace the car, but also to complement it. This is even more true if we look at the family level. It may be the case that an attractive MaaS offer can make people decide that one car is enough for the whole family.

Respondents see the greatest opportunities for implementing B2B MaaS in companies where workers receive a generous car allowance, either directly with a company car or through the existing mobility budget. Therefore, the opportunities are greater in the private sector than in public institutions and the non-profit sector. The mobility budget was the subject of much discussion in our focus groups. From the numerous discussions with various stakeholders, the mobility budget appears to be an important lever for a wider application of MaaS.

Some MaaS providers are banking on this. This strategy pays off, because if MaaS can be sold to travellers/commuters due to its greater ease of use, this must also be possible in the B2B context with regard to the employer. Employers expect the proposed product to be efficient, simplify administrative tasks, give them a better picture of the situation and enable them to draw up reports, and they want everything to be consolidated on a single invoice if possible. In addition, it is inevitable that employers will place a high value on price if they are to contract with a MaaS provider.

In summary, when feasible and affordable, B2B MaaS is attractive because it combines the green aspect with other social trends, such as digitalisation and teleworking, with the latter likely to remain at a higher level than before, even after the COVID-19 crisis. This requires greater flexibility than a unimodal solution designed for a five-day working week, such as a company car or train pass. In this way, B2B MaaS can offer a win-win model. The supply and demand are there, and policy makers at all levels can start working to accelerate its deployment. Moreover, this can be done to a large extent by implementing measures that benefit all those who wish to use alternatives to their own cars.