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Scooterino: Ride Sharing in Rome

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Introduction

Gazing at the congested Roman street outside his office, Oliver Page contemplated the challenges facing his young venture Scooterino, a sharing economy innovation in the scooter ride-sharing space rooted in the need for more efficient forms of transportation in Rome, the eternal city of traffic jams. Now with a business more than two year old, Page who had personally given over 100 rides was acutely aware of the growth challenges facing the firm as competitors and new technologies threatened to upend the firm's business. What were his growth options? Should he venture into other large European cities to expand the firm's geographical footprint? Or should he focus on gaining more depth in Rome by venturing into additional scooter delivery services?

Page had followed Uber's regulatory travails in Italy closely as the ride-sharing firm faced increasing pressure from established taxi cartels in Italy demanding a more even regulatory and competitive playing field. Page pondered ways of scaling the business in a bureaucratic culture notoriously resistant to entrepreneurship marked by capital resource deficits, as well as fluid regulations subject to change with the growth of the sector. How was he going to scale and grow the scooter sharing business in a rather inhospitable entrepreneurial culture compounded by regulatory scrutiny catalyzed by hostile competitors? Could the argument that Scooterino is more a technology rather than a transportation company work in Italy with its lower rate of technology start-ups? What were some potential growth options for Scooterino amidst the regulatory and cultural constraints?

He recalled the day just two years back, where he impatiently contemplated the traffic on a hot day in a crowded street in Rome, as he waited for a bus that was running 30 minutes late, a typical occurrence in this ancient city. Realizing that he was going to be late for an important appointment, Page noticed the sea of scooters buzzing by the bus stop. Not only were there dozens of scooters passing by, but most of them were occupied only by the driver—without a passenger on the back. Page was tempted to flag down a scooter driver and ask for a ride to his destination when the idea struck. While most forms of transportation in Rome suffered from overcrowding, most of the thousands of scooters on the road in Rome actually had excess

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capacity—the ability to transport one more person per scooter. Inspired by the success of ridesharing businesses in the United States, Page recognized the opportunity to bring scooter drivers together with passengers.

At that time, Page worked in the San Francisco Bay Area for a start-up organization that had infected him with the fever to start his own venture. Armed with this new idea, as well as the success of new businesses in the sharing economy, Page began working part time with a two partners in Rome and then decided to "move from the holy land of start-ups to the holy eternal city to start a scooter ride sharing business" (O. Page, personal communication, November 4, 2015). Although Roman citizens were conditioned by their environment to expect inefficient, non-dependable public transportation, Page had a hunch that they would appreciate and support an affordable, reliable alternative offered by a ride sharing service.

The Scooterino Story

Scooterino was started as a ride sharing application company in Rome, Italy in mid-2015 as one of the first independent scooter sharing/pooling ventures in response to the need for fast, efficient transportation for both locals and tourists in the heavily congested eternal city. The easy to use location based app allowed passengers to arrange rides on short notice with scooter drivers who were travelling in the same direction. Founder Oliver Page's personal frustration with traffic congestion in Rome led him to the idea of this new venture that was started with seed funding of $50,000 from the BIC Lazio business incubator, which is located north of Rome and affiliated with the European Space Agency (ESRIN). Business incubators provided a range of tangible and intangible services to support and nurture new ventures in their early years as well as some level of access to startup funding. The BIC Lazio incubator tended to favor technology and innovation driven businesses with the potential to scale.

The Scooterino web site was launched in April 2015, after hitting some snags with web site development. As Scooterino sought to find ways of increasing market visibility, a close local competitor, Byke, was also launching a similar type of ride sharing business. After his recent struggle with app developers, Page was impressed with Byke's technology strengths, but noted that marketing was not Byke's forte. Page and his team harbored strong business development and marketing skills. The business complementarities motivated the merger of Scooterino and Byke. As Page reflects, "They (Byke) had great technology, but had no visibility. It was like the stars had aligned. We decided to start working together. We relaunched the product on September 21, 2015 and have been getting really great growth ever since." (O. Page, personal communication, November 4, 2015).

Background

Urban Transportation in Rome

Given that the city of Rome was built over 2000 years ago, its infrastructure was not designed to support its current population of 2.6 million people. The density of population, 2232 people per square kilometer, plus the 9 million annual visitors to this ancient city, contribute to the congestion on Roman thoroughfares (worldpopulationreview, n.d.).

Many locals got around the city on bikes or (Vespa) scooters, which were cheaper than cars and moved easily through the crowded, narrow streets of the city. Although there were close to 690 passenger cars for every 1000 people in Italy, making car ownership prevalent (69% as compared to the highest ownership figure of 79% in US) (Fisher, 2012; Nationmaster, n.d.), most Roman citizens relied on public transportation of some sort to avoid battling traffic and parking issues. Traditional modes of public transportation were present in Rome, with the most popular being metro (subway), bus and taxi. The Roman metro had only two lines and 49 stations, which operated from 5:30 a.m. to midnight. The metro lines did not cover much of the city, and it was notorious for its inadequacy in meeting the capacity demands of its citizenry and tourists (Roessler, Shelegia, & Strulovici, 2014). By contrast, the bus lines in Rome covered the entire city. The routes were numerous, but the buses were generally crowded and often did not run on a dependable schedule, with delays quite common. Taxis were also a common form of transportation, but they were more expensive, depending upon the destination and distance. Taxi cartels located throughout Rome's center, controlled rates for all the official taxis in Rome. In this context, Scooterino provides an efficient and convenient mode of transportation.

Scooterino was positioned to hit the sweet spot between the capacity constraints of the metro systems and the high cost of taxis with its easy to use, on demand, cost effective ride sharing service. Moreover, scooters were a popular form of transportation in Rome with scooter ownership at 500,000 making it a city with the most registered scooters in the world. To ride a scooter in Italy, one had to be at least 14 years old; the scooter was a popular form of transport among Romans of all walks of life in a city with congested traffic and scarcity of parking.

The Sharing Economy

Description and Growth

Botsman (2013) defined the sharing economy as "an economic model based on sharing underutilized assets from spaces to goods and services for monetary or non-monetary benefits" (Botsman, 2013). The ecosystem enablers of this form of shared consumption that allowed aggregation of demand and supply were: (a) smartphones that allowed easy, anywhere, anytime access to applications, (b) social media that fostered trust and community, and (c) online payment systems that removed the friction from the payments process. Based on the premise that access trumps ownership, peer-to-peer sharing of a range of goods and services, including houses and cars, comprised a large share in business-to-consumer transactions. Findings from Juniper Research as illustrated in Figure 1, shows explosive growth in the sharing economy which is expected to continue, with total revenue projected to $20.4 billion in 2020, which more than tripled from $6.4 billion in 2015 (Smith, 2016).

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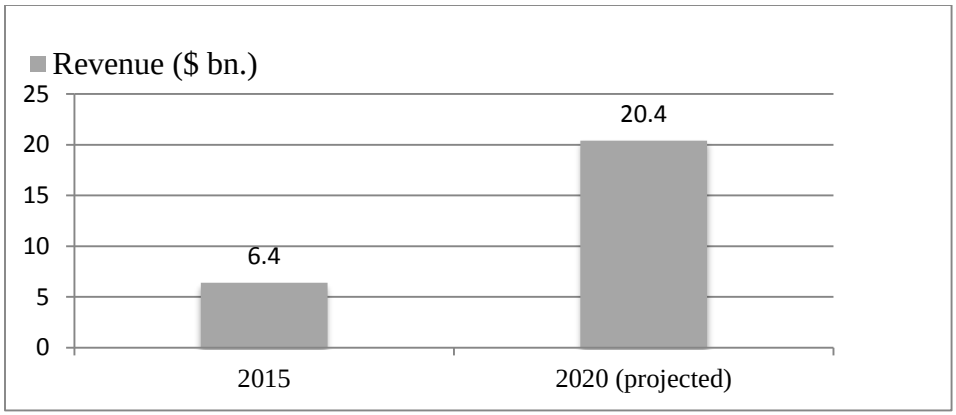

Figure 1: Revenue growth on sharing economy platforms

The traditional model of consumption predicated on the buy, use, discard cycle had been upended by trade, swap, or share models of the sharing economy. Co-consumption lowered transaction costs, increased resource use efficiency, addressed market failure and had a lower carbon footprint, making it attractive to a wide range of consumers, beyond just the 'green' consumer.

The financial crisis of 2008 catalyzed the birth of many peer-to-peer sharing businesses that were created with a view to conserving resources by sharing instead of owning. Some of the more prominent and well-known sharing businesses were Airbnb in housing and Uber in peer-to-peer car rental services. These digital businesses were based on a simple model of providing a supply of spare or idle resources to be shared that can be matched with demand. Network effects played an important role, since the businesses provided the digital platform, where buyers and sellers interacted, and the business in turn profited from taking a percentage of the revenue from each transaction on its site.

Transportation Sector

Peer-to-peer sharing in the transportation sector had grown in tandem with population growth in big cities around the world. A large city's efficiency was largely determined by the quality of its transportation infrastructure. However, the transportation industry in many big, densely populated cities, like New York or Rome, was characterized by market failure as witnessed by glaring gaps in fast, cost effective and convenient modes of transport. Car/ride-sharing businesses, like Uber and Lyft, grew meteorically by addressing these pain points. Efficiency, cost effectiveness, convenience and the positive environmental impacts of these new sharing businesses were the key selling points.

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Using a 2014 SurveyMonkey Audience survey of 1900 adults in six major US cities, Chuddoba (2014) highlighted consumer perceptions of the benefits of ride sharing. As illustrated in the Figure 2, consumers indicated the primary benefit of ride sharing was that it made their lives easier followed by their changing attitudes to modes of transportation.

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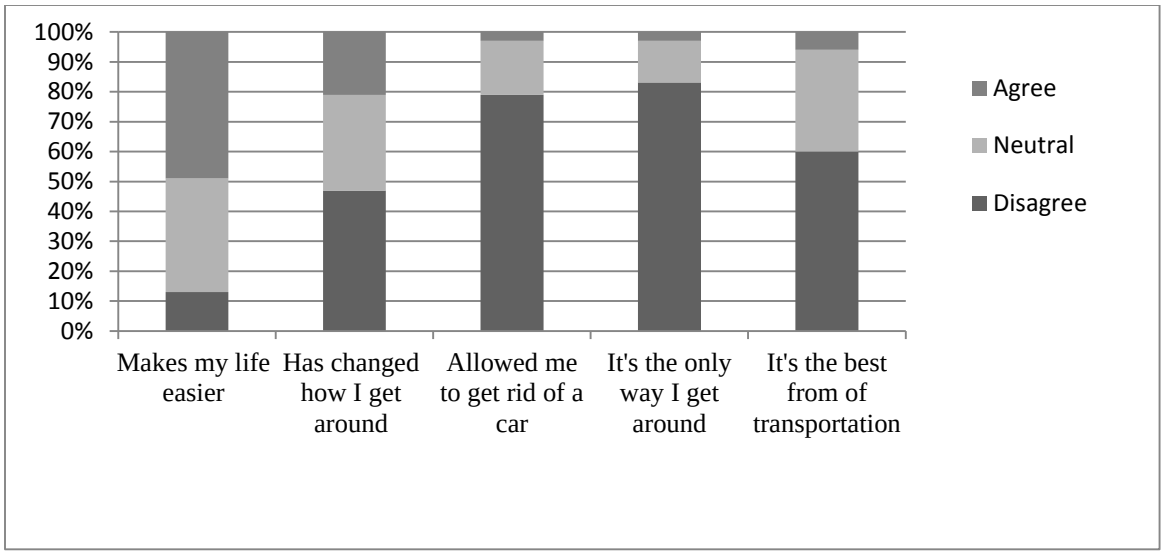

Figure 2: General Attitude towards Ridesharing

A recent MIT study pointed out that 95% of taxi rides in New York City could be shared, but were not since drivers made more money from ferrying one passenger (Connor-Simmons, 2017). Other studies of UberPool (ride-sharing by Uber) have demonstrated reductions in journey times as well as reduced congestion and pollution from ride sharing garnering both economic and environmental benefits. In addition to the functional benefits, sharing may also increased connectedness, serving as an antidote to the technology enabled isolation of virtual worlds (V. B., 2016).

Car sharing services can generally be classified into two broad categories: car rental-those that focued on peer-to-peer car rental (Zipcar, Wheelz, RelayRides) and ride sharing, which in turn may be categorized into those that offered ride sharing services and ride hailing / taxi like services, such as Uber. A good example of ride sharing car service was Blablacar in Europe that connected driver and rider going in the same direction for longer inter-city distances. Scooterino follows the model of Blablacar for inter-city ride sharing. So did recently launched Gogoro in Paris, but within large cities. Cooper (2014) explained how ride hailing and ride sharing, particularly in large densely populated cities, had the potential to create a massive alternative transportation network that complements and competes with the metro, bus, train and taxi systems at a much lower cost and greater convenience to customers.

Challenges in the Ride Sharing Sector of the Sharing Economy

Resistance from Competitors, Resulting in Regulations

Business growth in the sharing economy space had accelerated at a pace that has surged ahead of regulations. The new economy ride hailing and ride sharing businesses benefited from the regulatory vacuum that allowed them to compete with traditional providers of transportation services; however, the growth of these firms led to increased resistance from taxi drivers and regulators.

Lacking precedent in this arena, different countries dealt with the issue differently. South Korea for instance, suspended operations of ride sharing companies until specific regulations governing them can be put in place. Indonesia, where motorcycle taxis gained popularity, introduced new regulation effective October 1, 2016 that ride sharing firms had to partner with transportation companies licensed by the government or register for their own transportation company license, which involved compliance with road worthiness tests for vehicles as well as fare regulation. While this levelled the playing field, the question is whether this stifled innovation in this emerging sector (Faisal & Rohman, 2016). Interestingly, the Philippines gave Uber a new transportation classification allowing it to operate. In Italy, Uber fought several legal battles with taxi associations on grounds of unfair competition. A recent court ruling in April 2017 which banned Uber from all operations in Italy was withheld in May 2017 (Conditt, 2017). A similar car-hailing service in London, Taxify, was banned from allowing customers use of their apps (Ram, 2017).

Uber was the foremost company in the ride sharing sector, operating in over 645 cities in more than 77 countries (uberestimate.com) making it the bellwether for other companies in the sector. Although the regulatory landscape affecting Uber changed almost monthly, most of the regulatory challenges it faced were centered on concerns related to preserving fairness with Uber's competitors in more traditional organizations, most notably the taxi industry. In Europe, as in other parts of the world, taxis were highly regulated, with expensive insurance requirements, as well as significant taxes paid to the government for the privilege of owning a taxi. In Italy, the cost of a taxi driver license was as high as 120,000 euro (Casertano, 2015). Uber, conversely, did not bear these costs, as its drivers were operating their own private vehicles. In a move to preserve fair competition in the sector and to promote passenger safety, Italy banned Uber's POP service operated by drivers without a commercial license in 2015. The UberBlack service, which permitted only commercially licensed drivers, continued to operate in Italy, however (Kirchgaessner, 2015).

Building Passenger Trust

Most platform companies such as ride sharing services allowed users to post reviews online, creating a reputation trail of both driver and passenger. This crowd-based "reputational feedback mechanism" generated micro-regulation for ride sharing services (Farren, 2016) and provided a form of passenger safety – or at least increased the likelihood of a pleasant ride for both driver and passenger.

Any future improvement in car/ride sharing also needed to address this issue of passenger trust carefully. Recent controversies surrounding Uber on issues ranging from gender harassment, false advertising, discriminating access and use of personal information, underpaying drivers, deceitful use of competitors' reservation system, spying on rivals, and violating Google's self-driving car rights, significantly damaged its image. Floated as a tech company, Uber remained less stringent in screening drivers' criminal pasts and other background checks resulting in recruiting unsafe drivers. The major backlash against Uber, emanated from consumers boycotting their services and damaging reputation on social media (#DeleteUber) and from investigations by several governmental agencies in many countries created strong negative

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consumer perceptions on using ride-sharing in general (Levin, 2017). Increasing skepticism in consumers' minds could significantly limit potential benefits from ride sharing services. However, Page believed that Scooterino's driver vetting process coupled with the fact that the ride sharing occurred in an open scooter in the midst of a busy city context may ameliorate trust issues.

Environment for Entrepreneurship in Italy

The National Experts Survey ranked Italy lower than other European countries in almost all indicators of the entrepreneurial ecosystem. Government policies and programs, by and large, did not encourage entrepreneurial activity. Italy was known for its highly bureaucratic government, and the tax structure did not favor or incentivize entrepreneurship. Labor-related taxes were particularly high. Access to venture capital and private equity to fund start ups in Italy was more difficult than in most other developed countries (Zochhi & Bergamo, 2013). A deeply ingrained cultural fear of entrepreneurial failure in 49.1% of the adult population was another factor constraining the entrepreneurial ecosystem. The percentage of the adult population that perceived good opportunities for starting a business in Italy was 26.6%, compared with Germany's 31.3%. Overall, there was little early-stage entrepreneurial activity in Italy, with only 4.2% of the working age population involved in business startups, compared to Germany's 5.3% (Global Entrepreneurship Monitor, 2014).

Scooterino Business Model

Value Proposition

Scooterino's business model offered a clear value proposition to both driver and passenger. Drivers gained value from having their costs covered, and not having to go out of their way to drop a passenger. The passenger benefited from the fast, convenient and relatively inexpensive transportation that avoided the pain of finding parking or driving on congested roads. To combat misuse of the app and service and to create community trust, both rider and driver were able to review the experience. Since parties on both sides had access to reviews, this enhanced safety and also helped build community via meeting new people and potential friends. The cashless, quick payment via app took the friction out of the payment process.

Page indicated that he looked to the Airbnb model, which was for residence sharing, as well as the the BlaBlaCar model, an inter-city ride sharing business created in France that offered a car pooling long distance ride service shared by those going in the same direction. BlaBlaCar was different from Uber, which was an intra-city, on-demand service rivaling a taxi cab service. BlaBlaCar had avoided clashes with taxi cartels by providing only inter-city rides, and since the driver did not make a profit, the driver's insurance covered the passenger and the taxes levied on taxies were avoided as well. Scooterino offered a very similar model for intra-city rides; however the potential for clashes with taxi services and regulatory issues existed. .

Scooterino's drivers benefited from the opportunity to share costs of the ride. The requirements for Scooteristas / drivers were minimal. They installed the app on their phone, provided their owned scooter, own insurance and carried a helmet for passengers (scooterino, n.d.).

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Operations

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The key players in the Scooterino model were the drivers, known as scooteristas, and passengers. The main operational steps were:

Step-1: A driver or passenger wishing to be part of the Scooterino network downloaded and installed the app on their smartphone. Both sides input their destination information on the app, which used proprietary formulas to cross reference destinations. All a driver needed was a scooter, a spare helmet for the passenger, a payment receiving mechanism, a smartphone and insurance on the scooter. The passenger downloaded and installed the app and input his/her destination when a ride was required.

Step-2: The app matched the rider or passenger with a driver going in the same direction in real time. The passenger waited at the appointed location and hopped on the scooter to get to the desired destination.

Step-3: Upon arrival, the passenger paid the driver via the app. The driver then received a weekly expense reimbursement from Scooterino to help cover costs of the ride and scooter.

As a means to ensure that prospective scooteristas were suitable to drive, someone from the Scooterino team met with them in the company office, at which time Page and his team verified that the individual had a valid insurance, driver's license, and a well-maintained scooter, as well as a presentable appearance and good basic hygiene.

Since the model was based on providing enough funds to the driver to cover costs of scooter operation, but not enough to generate a profit for the driver, Page was adamant that drivers entering this space purely for profit would be revealed through analytics tracking the number of rides they gave and the amount of money they made. Drivers who broke the rules will be expelled from the site.

Pricing

Scooterino's pricing was based on the distance of the ride within the city. Passengers were charged 4 to 5 euros (the equivalent of about $4.50 to $5.75) for approximately 90% of all rides given by scooteristas, which was less expensive than alternate forms of public transportation. Rides of 8 kilometers or longer, which represented the other 10% of rides, were priced significantly higher (O. Page, personal communication, July 14, 2016). The pricing structure was unaffected by time of day; regardless of the increased demand for rides during peak travel times in the morning and late afternoon and during major events in Rome, passengers' charges were determined strictly by distance travelled, allowing Scooterino to sidestep the controversy that Uber and Lyft have faced for their surge pricing practices.

Early in its operations, Scooterino priced its rides below cost as a way to grow ridership and build its customer base. The company subsidized scooteristas' payments during this period to grow the number of drivers in their system, and they did not take a share of revenue received,

relying on their grant funding to sustain company operations in the short term. After approximately six months of this pricing scheme, the price per ride was increased, and Scooterino began taking a share of each ride payment.

Being the first to market with a scooter ride sharing business in Rome, offering an initial price that was well below the cost of other forms of transportation helped Scooterino grow its user base through word of mouth advertising. Page stated that word-of-mouth, PR, and free press were their main engines of growth (O. Page, personal communication, July 14, 2016)

Marketing Communications

With a major emphasis on digital strategies mixed with traditional campaigns, Scooterino planned to quickly penetrate into the domestic market. As a startup with limited funds available for marketing, Scooterino's initial growth was primarily driven by traditional media coverage, social media, its pricing, and the impact of word of mouth.

The concept of sharing a ride on a scooter in Rome, with its association of a Roman holiday, created visuals of Audrey Hepburn and Gregory Peck in the *Roman Holiday* movie. The cachet of this visual captured the imagination of the media, and according to Page, the company received frequent media coverage soon after it was launched.

Scooterino relied on its use of social media as an advertising platform that was both low-cost and effective. Page and his team capitalized on current events, national holidays and other cultural events to drive traffic to the firm's social media sites. Continuing its emphasis on social media as a means to grow its user base, Scooterino also planned to use paid advertising on Facebook and on Google. Besides, Scooterino utilized various other digital and online marketing channels, including blog posts to drove traffic to its website, created more online visibility and enhanced search engine optimization. Banner ads were placed that contained links to the Scooterino website and featured promotional codes allowing a new user to earn ride credit upon registering. The sites selected for banner advertising targeted not only Romans, but the tourist and expat community as well. By targeting tourists and expats, Scooterino intended to offset the seasonality that occurs during late summer when most Romans left the city to go on holiday (O. Page, personal communication, July 14, 2016).

Regulations

Scooterino was entering a cartelized industry where traditional transportation service providers such as taxis were protected by a web of licenses and regulations. The young firm had avoided regulatory hassles by positioning itself as a ride sharing company where a driver shared a ride with a passenger going in the same direction, so there was no profit involved for the driver. This model was significantly different from an Uber model where the driver was in it to make a profit by providing services very similar to a taxi. Page viewed other car sharing services, such as Car2Go or Enjoy, and not taxis, as Scooterino's closest competitors. However, they were first to market with scooter sharing, and there were no other similar businesses in this space in Italy.

Issues related to labor were also minimized relative to more prominent car sharing services, such as Uber, which had come under attack lately in the United States for not treating drivers as employees with all the associated benefits. Scooterino drivers were able to freelance their service since they were simply covering the costs of operating their scooters and not going out of their way to provide a taxi like service.

Insurance companies typically required commercial insurance for business use of a vehicle, which contributed to another murky regulatory area in the ride sharing sector – when is personal insurance sufficient and when is commercial insurance needed? Many ride sharing companies provided some level of commercial insurance to reduce their drivers' costs and provide their company with protection from liability (Denmon, 2014). Relying again on its model of scooteristas sharing rides to cover the costs of operating their scooters, not to make a profit, as a source of immunity from burdensome regulation which requires additional expense, Scooterino's drivers were not required to have a commercial insurance policy or a commercial drivers' license. Personal scooter insurance policies in Italy required the driver to provide coverage for the passenger, although not necessarily for the driver himself or herself. Scooterino had adopted this as the minimum required insurance coverage threshold required of their scooteristas; it was not necessary for the drivers themselves to be covered (O. Page, personal communication, July 14, 2016).

Regulations had caught up with scooter sharing companies in countries such as Indonesia, where firms like GoJek and Grab Bike have grown exponentially. Given Scooterino's relatively small scale at present, coupled with a slow moving Italian bureaucracy, Page hoped that the firm would be able to gain critical mass before regulations caught up.

Future of Scooterino

Like all start-up ventures, Scooterino faced plenty of challenges. As Page led the company into its next months and years, how would he continue to grow the user base? How will Scooterino stay under the regulatory radar? What other challenges might Scooterino face?

Page had aspirations for growth beyond Scooterino's current business model. Two possible growth strategies included expansion to other European cities and expansion of services offered by Scooterino. . What did Page need to consider when deciding which of these strategies to pursue? As Page left his office after a long day, he wondered ways of navigating the potential regulatory minefields that were to be expected with growth of Scooterino and the ride sharing sector? How would competitors react to the growth of ride sharing as they saw their profit sanctuaries dwindle? Would the Italian culture and its bureaucracy pose a major roadblock to growth? How would Italian regulations evolve with regard to the treatment of drivers as independent contractors? How would he deal with these and other technological challenges looming on the horizon?

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