Delivering Mobility as a Service in Scotland

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Where did MaaS come from?

- Global market forces
  - Personalisation
  - Complexity of lifestyle
- Smart technology
  - Mobile
  - IoT
- Integrated mobility
  - ITS
  - Smart ticketing
  - TMS
The MaaS Value Chain

**Things that move**
- People
- Goods

**Networks**
- Transport
- ICT
- Smart Grid

**Customers**
- People
- Business
- Government

**Vehicles**
- Land
- Sea
- Air

**Service Provider**
- Valued
- Integrated
- Trusted
Insider view
The industry will evolve naturally and incrementally toward a future mobility system that retains its roots in what exists today. The key players, major assets, and overall structure of the current ecosystem can remain intact while change progresses in an orderly, linear fashion. The incumbent mindset appears dually focused on sustaining the current model while testing change in small ways.

Disrupter view
A whole new age is dawning featuring fully autonomous cars accessible on demand. Before long, a tipping point will occur, after which the momentum of change will become unstoppable. New entrants, notably Google, Uber, and Apple, are catalysts for transformation.

Unlike the stakeholders in today’s system, they do not have vested stakes to protect.

Source: Deloitte analysis, based on publicly available information and company websites.

Graphic: Deloitte University Press | DUPress.com
It’s happening and quickly

- The auto industry and other large companies are acquiring mobility service companies
- The auto industry is changing to a mobility service model. Pay as you go rather than purchase. Impact of autonomous vehicles
- MaaS Scotland, MaaS Global/Whim/TuuP/Vinka/Sito, Ubigo, West Midlands/Whim, Travel Spirit, Singapore, Catalonia, Germany, Netherlands, Australia/New Zealand, Japan, Dubai, Austria, USA, Switzerland, Vienna/Upstream, Netherlands all active in MaaS
- European MaaS Alliance now formed and MaaS Scotland a member
- Peer to Peer car share, car clubs, Uber type services potentially the new local bus re-defining public transport
- Mobility companies partnering – eg public transport and taxi (Travel Hero and Uber)
- Data sharing – SNCF, RAPT, Transdev and Blablacar creating a common “data roof”
- Last mile and MaaS – Uber, Ericsson/Volvo, ALD/DHL, JLR

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What are the key elements of MaaS?

- User focused – lifestyle needs. A bottom-up system starting with the user – personal and business
- Valued by the user
- Door to door, reliable, seamless service as good as the private car
- Mode neutral – all about seamless, reliable door to door journeys
- One account/one Mobility Service Provider for the user
- Can originate around public transport or the private car – incremental changes
Potential outputs

- Generates new markets and profits
- Generates new funding streams from value added products and services
- Generates efficiency savings
- Provides the ability to shape and balance the mobility system – supply/demand
- Enables the delivery of other strategic objectives like health, environment and social needs
Many questions to be answered!

- How can the transport industry get involved with MaaS systems – can it lead?
- What is the role of central and local government?
- How can we change from an operational, top down, mode based business model to a customer focused, seamless, mode neutral service business model?
- How can we ensure social equity and environmental sustainability?
- Does MaaS work in rural areas and low income areas?
- How do we integrate top down strategic city/regional planning with bottom up personalised MaaS systems?
- ....Lots of questions. **Need to do it to answer them!**

...So here’s what we are doing!
MaaS Scotland

- We believe in rethinking mobility in a way that’s **faster, smarter** and **greener** than before.
- By encouraging **shared work and collaboration**, we plan to drive Scotland’s **MaaS Community** to offer new and alternative ways to travel, address user needs and develop technological solutions.
- Aim to generate a **thriving ecosystem** in Scotland, enabling a future of smart, efficient and sustainable mobility.

*With an appetite from industry, strong existing capability and support from Scotland’s leading technology trade associations, MaaS Scotland aims to secure Scotland’s future as one of the leading locations for the development of MaaS*
Scotland can lead the way

- Scotland is in an excellent position to play an active role in the global development of MaaS

- It has strong capability in the three key areas of MaaS
  - Technology
  - Energy
  - Transport

- Supportive government framework

- Right characteristics in terms of scale and geography to develop and test MaaS ecosystems

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**MaaS Scotland – a brief history**

<table>
<thead>
<tr>
<th>Year</th>
<th>Event</th>
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<tbody>
<tr>
<td>2014 – 2017</td>
<td>Scottish Enterprise appointed a Network Integrator to develop an organisation to drive MaaS activities/projects in Scotland</td>
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<td>March 2017</td>
<td>MaaS Scotland formalised with support from Scottish Enterprise under the management of Technology Scotland and ScotlandIS</td>
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<td>May 2017</td>
<td>Achieved full membership of European MaaS Alliance</td>
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<td>June 2017</td>
<td>Steering Board appointed</td>
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<td>June 2017</td>
<td>Hosted Whisky Reception at ITS European Congress</td>
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<td>June 2017</td>
<td>Held meeting with Scottish Minister for Transport and the Islands and officials from Transport Scotland</td>
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<td>July 2017</td>
<td>25th member joined MaaS Scotland</td>
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<td>Sep 2017</td>
<td>MaaS Scotland Launch Event and Conference</td>
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<td>May-Sep 2017</td>
<td>Facilitating and supporting 10 Phase 1 MaaS Projects</td>
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Membership

46 members have joined MaaS Scotland

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Growth

- Membership growing rapidly – 45 Members – All the Regional Transport Partnerships, TfE, SPT and membership from outwith Scotland
- Developing 10 MaaS Phase 1 projects in Scotland to demonstrate the commercial, environmental and social advantages of MaaS and profile Scotland as a global leader in MaaS.
- Scottish Minister for Transport and the Islands and Transport Scotland interested in working with MaaS Scotland to deliver MaaS
- Developing relationships with other MaaS Alliances – KTN and Transport Systems Catapult, European MaaS Alliance, Finland, Sweden, Austria, Singapore, Japan, Catalonia, Australia and New Zealand

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Projects

- Cairngorm National Park/Inverness Region – Urban/Rural National Park and tourism
- MILL Project, Dundee City Council/Tay Cities Deal – City
- Perth and Kinross Council with Stagecoach and Hiyacar – Small city/rural villages
- Isle of Arran mobility package – ferry, rail, bus, taxi, bike and car – Rural island
- Strathclyde Region and Nevis Technologies – Regional area
- Stirling Regional Council – Small city/rural villages
- Transport Scotland Smart Highway Corridor – Connected vehicle highway corridor/tourism/rural communities
- Edinburgh Council/Transport For Edinburgh - City
- Orkney Islands Council – Rural islands/mainland connections/major town/tourism
- Navigogo – sectoral development with young people. Possible project for dementia sufferers and carers

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Mobility as a Service Workshop
Creating successful solutions in Scotland

» Access funding opportunities
» Shape current and future projects
» Identify technology and partnership gaps
» Develop consortia
» Explore business cases

22 November 2017
Oracle Campus, Linlithgow

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