

**MAAS SCOTLAND.**  
**RETHINKING MOBILITY.**



# **Delivering Mobility as a Service | MaaS Scotland**

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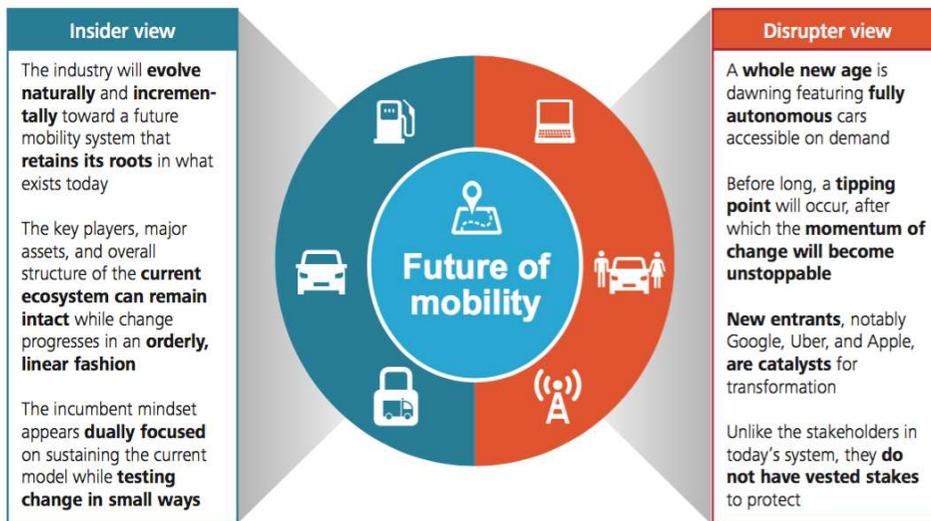
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Figure 3. "Insider" and "disrupter" views of the future of mobility



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

Graphic: Deloitte University Press | DUPress.com

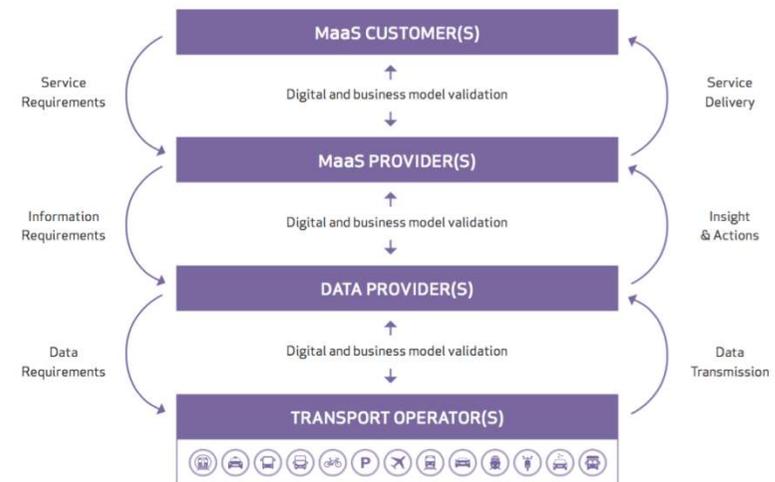


FIGURE 4: Simplified MaaS value chain

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## Potential outputs

- Generates new markets and profits – a global business
- Generates new funding streams from value added products and services
- Helps to attract and retain residents, businesses and visitors through personalised services matched to their lifestyle needs and quality of life
- 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

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# 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!**

# MaaS Scotland – a brief history



<b>2013</b>	Intelligent Mobility for Smart Cities study
<b>2014 – 2017</b>	Scottish Enterprise appointed a Network Integrator to develop an organisation to drive Smart Mobility > MaaS activities
<b>March 2017</b>	MaaS Scotland formalised with support from Scottish Enterprise under the management of <b>Technology Scotland</b> and <b>ScotlandIS</b>
<b>May 2017</b>	Membership of European MaaS Alliance
<b>June 2017</b>	Steering Board appointed
<b>June 2017</b>	Hosted Whisky Reception at ITS European Congress
<b>July 2017</b>	25 <sup>th</sup> member joined MaaS Scotland
<b>Sep 2017</b>	MaaS Scotland Launch Event and Conference
<b>Today</b>	Facilitating and supporting series of potential MaaS Projects Series of events and workshops Engagement with Government

# 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*

# Supporting MaaS Development



- Support collaboration and knowledge exchange through events and workshops
- Facilitate Scottish MaaS project pipeline
- Create attractive environment for MaaS development and upscale in Scotland
- Link Scottish MaaS cluster to similar international groups

# 64 members to date



Largest MaaS network in Europe

# Thriving ecosystem



- MaaS Scotland is now regarded as the largest MaaS network in Europe
- Diverse network includes competencies across the MaaS supply chain



## Connection to Scotland's Technology Sector



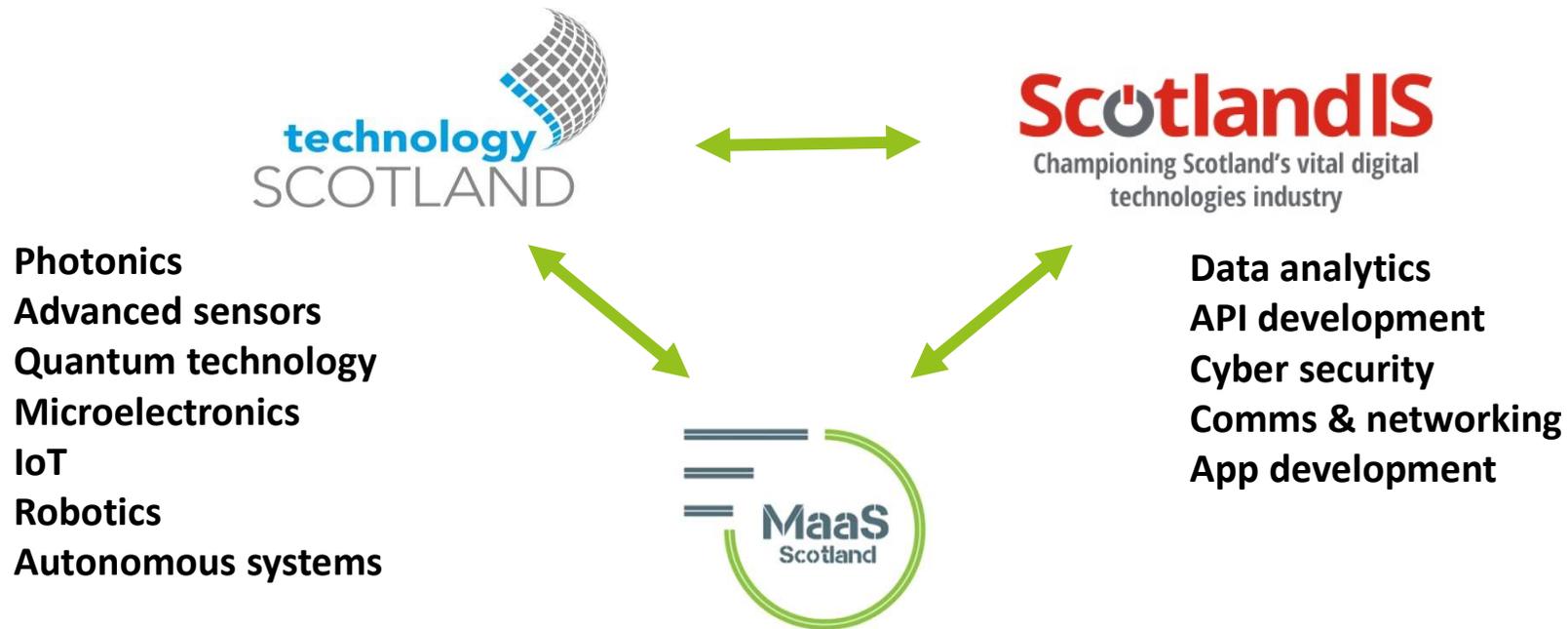
- MaaS Scotland is operated by Technology Scotland and Scotland IS – representative bodies for Enabling Technologies and Scotland's Digital Sector respectively
- Together these organisations represent over 300 companies and link Scotland's MaaS ecosystem to a vibrant technology base



# A powerful alliance



Network of over 300 companies/organisations



# Networking and Events

- MaaS Scotland launch event and conference – Sep 2017
- Workshops – in partnership with KTN
  - Scottish MaaS Project Workshop – Nov 2017
  - Role of Operator/Business Model – Mar 2018
  - MaaS in Rural Areas – 1<sup>st</sup> May 2018
- Annual MaaS Scotland Conference – 26<sup>th</sup> June 2018



# MaaS project pipeline



- MaaS Scotland are supporting and facilitating the development of a MaaS Project Pipeline in Scotland
- There are now 11 projects in the pipeline covering:
  - Urban
  - Urban-rural connectivity
  - Deep rural
  - Island
- First MaaS project started in October 2017 with additional projects beginning in January 2018

# Projects



- **Cairngorm National Park/Inverness Region** – *Urban/Rural National Park and tourism*
- **MILL Project, Dundee City Council/Tay Cities Deal** – *City - **Started***
- **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/ECCI** - *City*
- **Orkney Islands Council** – *Rural islands/mainland connections/major town/tourism. **Innovate UK bid.***
- **Navigogo** – *sectoral development with young people. Possible project for dementia sufferers and carers. **Started***
- **Connected Highway/Vehicles** – *Discussions underway with partners*

# Project Pipeline



1. Orkney
2. Cairngorm National Park/Inverness/Highlands region
3. Dundee MILL
4. Navigogo
5. Stirling
6. Perth and Kinross
7. Isle of Arran mobility package
8. Strathclyde region
9. Edinburgh

# Navigogo

- What is it?
  - Mobile optimised web app
  - Designed by 16-25 year olds for 16-25 year olds
  - Lets users plan, pay for and interact with multimodal travel
- Implementation
  - Trial in N Fife and Dundee – October 2017 – March 2018
  - Testing and refinement



# Dundee MILL (Mobility Innovation Living Laboratory)



- A real life test bed for innovative, smart and sustainable mobility solutions
- Develop mobility solutions that increase accessibility to transport for all and reduce emissions
- Living Lab approach – user-centred solutions
- Innovation – co-creating, testing and scaling-up
- £950k for ShareMORE pilots
  - Advanced mobility services
  - Advanced fleet services
  - Advanced parking services
  - Advanced use of urban data
  - Zero cost bike hire scheme
- Procurement underway
- Pilots operational Q2 2018 – end 2019

# Cairngorm National Park/Highlands



- Rural transport issues
  - Residents
  - Visitors – importance of tourism
- Cairngorm Connected
  - Multi stakeholder group established
  - Outline business case prepared
  - Funding application being finalised
- Inverness City Region
- Challenges – geography and connectivity
- Future model for delivery of transport in rural areas
  - Public transport more convenient, attractive, flexible
  - Socially inclusive
  - Economic and environmental sustainability
- A connected, low carbon Highlands and Islands

# Danger of fragmentation



- Multiple projects with restricted geographical boundaries risks fragmentation of service
- Interoperability must be addressed
- Need to provide attractive environment for MaaS upscale
- **National MaaS Framework**

# Enabling actions



- Scottish Cities Alliance – Smart Cities Scotland Blueprint
- Transport Scotland – Future Intelligent Transportation Systems Strategy
- National Transport Strategy - refresh

# MaaS Scotland Paper



**MaaS Scotland**

**Mobility as a Service:  
Positioning Scotland for  
an Emerging Global Market**

A joint venture between Technology Scotland and ScotlandIS

technology SCOTLAND ScotlandIS

14 | Positioning Scotland for an Emerging Global Market

**Concluding Remarks**

The MaaS community in Scotland is vibrant, with a number of high profile 'anchor' companies supported by a hugely powerful network of SMEs providing innovative technologies and products. Representation across the supply chain is strong, from technology providers and systems integrators to transport operators and regional transport partnerships. With a willingness from private and public sector organisations, a strong pipeline of demonstrator projects, and a unique and attractive geography to deliver MaaS, Scotland stands in a great position to exploit this transformational and lucrative opportunity. However, the window of opportunity is small, and Scotland's reputation as a world leader in MaaS is under threat without the necessary financial and strategic support from the Scottish Government.

This paper sets out three proposals for Scottish Government intervention that would ensure that Scotland capitalises on the opportunities that this significant new market presents. The time for Government action is now. By strengthening the relationship between industry and Government, Scotland can establish itself as a global home for MaaS, benefiting from the positive economic, environmental and social impacts this will create.

**Economy and Innovation**

- Encourage uptake of MaaS solutions developed in Scotland
- Drive inward investment by positioning Scotland as an attractive base to develop MaaS products
- Generate high value jobs by supporting vibrant SME base
- Encourage innovation in significant new export market
- Create growth opportunity for some of Scotland's key sectors – e.g. Energy and Mobility

**Sustainability and Efficiency**

- Maximize efficiency of existing transport assets
- Manage supply and demand curves for Scotland's busiest transport routes
- Reduce traffic congestion in known hotspots
- Improve planning and policy decisions through better visibility of traveller needs and behaviours

**Inclusivity and Community**

- Significantly increase transport provision for those without access to a car
- Improve access to transport services for those with disability or being with poor health
- Enhance connectivity for island, rural and semi-rural communities
- Encourage community building through shared transport provision

**Environment and Health**

- Reduce carbon emissions by increasing patronage on Public Transport and encouraging vehicle sharing
- Incentivise active travel such as cycling and walking
- Align transport provision with key MMS services
- Manage travel behaviour in key areas of poor air quality



# Proposal 1



- I Formation of a joint Working Group, to include Transport Scotland and MaaS Scotland, that will develop a roadmap for the delivery of a National MaaS Framework
  - Facilitate upscale and roll out of successful MaaS models across Scotland
  - Create an attractive environment for inward investment
  - Encourage innovation in a significant new export market
  - Position Scotland as the global partner for the development of MaaS models

# Proposal 2



**II An initial Scottish Government investment of £1-2m in the form of a ‘MaaS Delivery Fund’ to support ongoing MaaS projects over the next 2 years**

- *Leverage national and international private sector investment*
- *Generate an evidence base to support future policy and planning decisions*
- *Identify innovative ideas and exportable solutions*
- Strengthen Scotland’s reputation as a world leader in future mobility

# Proposal 3



I Further Scottish Government investment to support MaaS Scotland activities until 2021

- *Support and grow Scotland's MaaS community*
- *Facilitate current and new MaaS projects*
- *Promote Scotland's products and expertise on the global stage*
- *Provide thought leadership at national and international level*

# International relationships



- MaaS Scotland is gaining international recognition as the ‘blueprint’ for the development of MaaS Networks
- MaaS Scotland is in discussion with similar networks in Canada, Spain, Austria and Finland
  - Looking to establish formal relationships that will facilitate collaboration and knowledge sharing





SAVE THE DATE

# MaaS Scotland 2018 Annual Conference

26 JUNE | DYNAMIC EARTH, EDINBURGH  
CONFERENCE | EXHIBITION | NETWORKING



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