London Councils' TEC Executive Sub Committee

Future Mobility Agenda: The Final Report of the Task & Finish Group on Smart Mobility & Mobility as a Service (MaaS)

Item no: 06

Report by:	Paulius Mackela	**Job Title:**	Principal Policy & Project Officer
Date:	06 February 2020		
Contact Officer:	Paulius Mackela		
Telephone:	020 7934 9829	**Email:**	paulius.mackela@londoncouncils.gov.uk

Summary:	Smart technologies and the better use of data and Mobility as a Service platforms could make positive impacts on the efficiency, environmental performance and safety of London's transport networks. The Task & Finish Group on Smart Mobility and Mobility as a Service (MaaS) discussed the role of London local government within this policy area and the potential models for an integrated multi-modal journey planning and payment solutions. This report is the output from these intensive discussions over the past four months, asking TEC Executive members to discuss and agree the recommendation from the Group.

Recommendations:	The Committee is asked to:

- Note and comment on the report
- Agree the recommendation put forward by the Task & Finish Group on Smart Mobility & MaaS as outlined in paragraph 15
- Agree for *Demand-Response Schemes* to be the third focus area of the Future Mobility Agenda

The Final Report of the Task & Finish Group on Smart Mobility & MaaS

Introduction / Overview

1. London Councils' Transport and Environment Executive Sub Committee (TEC Executive) received a 'Future Mobility: Recognising and seizing opportunities in London[1]' report on 15 November 2018, which suggested a more active role for London Councils' TEC Executive Committee in contributing to policy development for autonomous transport, bicycle and car sharing schemes, demand-response services and developments in smart mobility platforms. Members agreed to the report's recommendation to set up temporary Task & Finish Groups with political oversight through London Councils' TEC Executive Committee meetings.

2. At the TEC Executive meeting on 18 July 2019, members agreed for Smart Mobility & Mobility as a Service (MaaS) to be the second focus area of the Future Mobility Agenda. Following this, at the TEC Executive meeting on 12 September 2019, members approved the proposed composition, purpose, scope, size and timeline for the work of the Group, and noted other relevant information about the Group. At the TEC Executive meeting on 14 November 2019, members received a report which provided an update on the first two meetings of the T&F Group and outlined further work.

3. TEC members also received a report[2] on smart mobility and MaaS on 7 December 2017, which suggested a more active role for London Councils' TEC in contributing to policy development in this policy area to assist in tackling air pollution and congestion challenges in London.

Background Information

   Terminology
4. The latest developments in technology and data accessibility have led to new transport business models being introduced. One of the new paradigms is known as Mobility as a Service (MaaS). Given that there is no one dominant definition of MaaS used across academic literature and the policy world, it was important to provide a clear interpretation of this term within the work of the Group.

5. For the purposes of this task and finish group, MaaS was defined as a platform (i.e. an app) where users can access, plan, book and pay for a range of mobility services through a single interface. This definition is closely aligned with the one used by TfL[3]. Berlin provides a good example of such platform as it has recently launched a new app, *Jelbi*, which offers multimodal transport solution by incorporating public transport, active travel, car sharing, and taxis into one app.

   Purpose & Progress
6. The Task & Finish Group on Smart Mobility and MaaS was brought together by London Councils in order to provide an analysis of the current state of MaaS in London, develop

---

[1] Full report can be accessed here: https://www.londoncouncils.gov.uk/node/34772
[2] https://www.londoncouncils.gov.uk/download/file/fid/21717
[3] http://data.parliament.uk/writtenevidence/committeeevidence.svc/evidencedocument/transport-committee/mobility-as-a-service/written/77598.pdf

a shared vision supported by all key London government stakeholders and clearly identify the role that London boroughs should play in this policy area going forward.

7. The inaugural meeting of the group was held on Thursday 3 October 2019 with the following four meetings scheduled throughout late 2019 and early 2020. The final meeting of the group was held on Thursday 16 January 2020. The meetings were split into the following themes:
   - Meeting no. 1: Project overview and agreeing the terms of the Group
   - Meeting no. 2: Understanding the future of MaaS development on a national level
   - Meeting no. 3: Exploring MaaS platforms together with leading academics and researchers
   - Meeting no. 4: Giving MaaS operators an opportunity to provide their vision of MaaS in the capital
   - Meeting no. 5: Drawing conclusions and formulating a shared vision for MaaS development in London

8. The group was made up of officers from London Councils, the GLA, TfL and local authorities. A wide range of guest members were invited to attend the meetings and provide evidence (the following list includes MaaS platform providers, universities, consultancies, civil service and 3rd sector representatives actively working in this policy area): Bristol University, BVRLA, CityMapper, CoMoUK, Department for Transport, Enterprise, MaaS Global, Mott MacDonald, Trafi, Uber, University College London, University of Hertfordshire. These stakeholders were identified through research on MaaS in London and through existing contacts with universities and the industry.

9. UCL Energy Institute's study (2015)[4] outlined a number of benefits of such systems including travel cost and time reduction, better service experience and more effective and cheaper transport system. It also concluded that MaaS is a potentially feasible product for London and "can well serve London transport market and contribute to Londoner's quality of life". Another UCL report (2018)[5] has shown that MaaS has a real potential to reduce car ownership and usage levels by increasing the use of public transport and active travel. Finally, some research papers[6][7][8] suggest that MaaS pilots have the potential to increase efficiency in transport networks, reduce congestion levels and, as a result, improve air quality.

10. However, if MaaS develops in an uncontrolled way, it could potentially have unintended negative consequences such as digital and social exclusion, geographical disbalance of the city where some parts are simply left behind, or even result in increased road congestion and worsened air quality levels.

11. A way to ensure that any future MaaS platform in the capital brings positive change to our transport network is to set a shared vision for incentivising preferred transport modes

---

[4] https://www.ucl.ac.uk/bartlett/energy/sites/bartlett/files/fs-maas-compress-final.pdf
[5] https://www.ucl.ac.uk/bartlett/energy/news/2018/feb/londoners-open-move-away-car-ownership-mobility-service-schemes-ucl-research-shows
[6] https://assets.kpmg/content/dam/kpmg/uk/pdf/2017/08/reimagine_places_maas.pdf
[7] https://publications.parliament.uk/pa/cm201719/cmselect/cmtrans/590/590.pdf
[8] https://trid.trb.org/View/1502485

(i.e. active travel and public transport) over less sustainable ones (i.e. private car trips). In a way, such vision already exists within the Mayors Transport Strategy and other relevant documents.

12. It is worth noting that the Department for Transport is expected to launch a regulatory review of MaaS in early 2020, which will provide an opportunity for London to ask for relevant powers to set framework conditions for MaaS platforms and form incentives. More information about this below.

Task & Finish Group Recommendation and Discussion

13. The Task and Finish Group made up of officers from the GLA, TfL, London Councils and individual boroughs, has developed a joint understanding and vision for a pan-London MaaS. The TEC Executive is asked to take note of the discussions held that have led to this joint vision and discuss the recommendation going forward.

14. The group believes that a user centric MaaS, if developed responsibly and tailored to supporting public policy goals, has the potential to make positive improvements on efficiency, sustainability, accessibility and safety of London's transport network.

Recommendation

15. **The group therefore recommends that TfL should be recognised as the lead organisation in developing and managing a pan-London MaaS solution which has public good at its heart, in collaboration with and support from London boroughs and London Councils.**

Discussion

16. The following paragraphs outline key principles and agreements the group was able to reach on the future of MaaS in London and provide the rationale behind the recommendation. These will form the starting point for TfL when developing the pan-London MaaS solution further.

Which MaaS model to use

17. There is no single MaaS model that is universally applicable to all cities. Given the different circumstances in various cities and regions across the world and the unique transport landscape in London, copying a model from another city will not work (i.e. Berlin, Helsinki). TfL already provides a form of MaaS by providing open data and integrated payments for the modes they are responsible for. These two factors also mean that there are very few barriers to private providers of MaaS platforms developing services, possibly in ways which work against the city's policy goals. As such, the group concluded that **London needs to ensure that MaaS solutions feed into the capital's strategic long-term vision instead of working against it.**

18. A well-developed multimodal and user centric MaaS solution has the potential to provide an attractive and efficient service to Londoners, at the same time as promoting a shift towards more sustainable, accessible and efficient transport modes. Based on the evidence provided by academic researchers and other stakeholders **the group agrees that public transport and active travel should be the backbone of any future MaaS service in London.**

19. **Any integration of various forms of transport modes into a mobility service platform should be done on a pan-London level rather than individual borough or strategic partnership level.** This is because an effective MaaS platform would feature local transport infrastructure, which crosses borough boundaries and combines numerous services spread out across the capital, i.e. public transport, active and shared mobility, taxis, etc. Therefore, only a pan-London solution would provide enough information and transport options to be attractive for users. Given that Londoners most commonly see the capital as one homogenous city and do not necessarily know where the borough boundaries are, developing several competing borough level or regional MaaS platforms would be counterproductive for coordinating mobility modes and providing available travel options.

Who is best placed to lead MaaS development in London

20. Given the conclusions above about having an active travel and public transport focus and any MaaS solution being pan-London, **TfL, as the integrated body responsible for London's public transport system, is best placed to act as a facilitator to coordinate and manage any future development of a MaaS platform driven by the public good in London.** While TfL will naturally lead in this space, collaboration and support from London Councils and the boroughs will be necessary. Where appropriate and where decisions and services are directly relevant to London boroughs (i.e. car sharing, micro-mobility, parking, setting incentives) TfL will directly engage with London Councils and the relevant boroughs. This could potentially take the form of informal consultations through London Councils, attending existing officer networks or setting up a new officer working group.

21. The case for a market-led option, made possible by the unique conditions which exist within London (primarily contactless and open data), was discussed. Although hard evidence is currently lacking, the group had concerns that these platforms could prioritise less sustainable modes, depending on the operator developing them. To encourage these commercial platforms to remain closely aligned with London's objectives and to ensure that future services are inclusive, equitable, and supportive of a vision for London that is democratically accountable, the group recommends that **London's government sector (with TfL as a lead organisation) should set framework conditions for MaaS platforms and forming incentives.** This will require new regulatory powers and should be considered within the governments upcoming regulatory review of MaaS. It is suggested that once the government launches the regulatory review on MaaS the group meets again to discuss and coordinate responses to provide a consistent pan-London position.

22. The group acknowledges that in addition to ensuring close cooperation across different layers of London local government, it will also be important to collaborate and establish open dialogue with new mobility operators. **Since MaaS integrates multiple transport modes, it is key to establish a culture of trust, shared benefits and innovation.**

Timeframe

23. With regards to the timeline of further work within this policy area**, the group acknowledges the urgency and importance of this and agrees that the development of strategic plans should be a policy priority.**

Conclusion

24. Smart technologies and the better use of data and MaaS platform could make significant positive impacts on the efficiency, environmental performance, accessibility and safety of London's transport networks.

25. Over the past months, the Task & Finish Group on Smart Mobility & MaaS has been meeting regularly to understand the key challenges and opportunities and agree on a pan-London vision for MaaS.

26. Following the previous advice from members of TEC Executive and the evidence received from academia, government departments and relevant industry bodies, the Group has come up with a recommendation.

27. TEC Executive members are now asked to discuss and agree this recommendation and the further information presented as a way of discussion in the report above.

Next focus area - Proposal

28. As outlined in the original Future Mobility Agenda report, London Councils activities within the agenda can be summarised into five different categories as illustrated in the chart below.
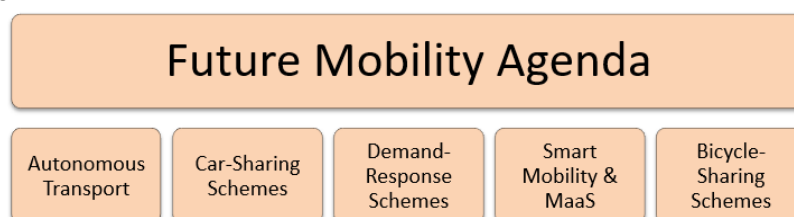
29. Now is the time to agree on the next focus area of the agenda. London Councils' officers recommend that this should be the *Demand-Response Schemes* category.

30. A 'demand responsive' system is a flexible, shared and user-oriented form of public transport. It is designed to provide transportation services in low-demand-areas and is based on the needs of customers (pick up locations, times, destinations, etc.). TfL has launched trials for demand-response bus service in Sutton[9] in May 2019 (due to end in May 2020) and Ealing[10] in November 2019 (due to end in November 2020). As TfL and relevant boroughs have been receiving trial data and feedback from users, we suggest that London Councils and LC TEC Executive should play a key role in analysing this information and forming a shared pan-London view within this policy area.

31. It should also be noted that out of the two remaining workstreams of the agenda (autonomous transport and demand-response schemes), London Councils' officers do not think that it is the right time to look at autonomous transport because TfL is currently leading policy development on connected and autonomous vehicles and we are already working very closely with them.

---

[9] https://gosutton.co.uk/
[10] https://consultations.tfl.gov.uk/buses/demand-responsive-buses/

Recommendations

The Committee is asked to:

- Note and comment on the report
- Agree the recommendation put forward by the Task & Finish Group on Smart Mobility & MaaS as outlined in paragraph 15
- Agree for *Demand-Response Schemes* to be the third focus area of the Future Mobility Agenda

Financial Implications

There are no financial implications to London Councils arising from this report.

Legal Implications

There are no legal implications to London Councils arising from this report.

Equalities Implications

There are no equalities implications to London Councils arising from this report.