

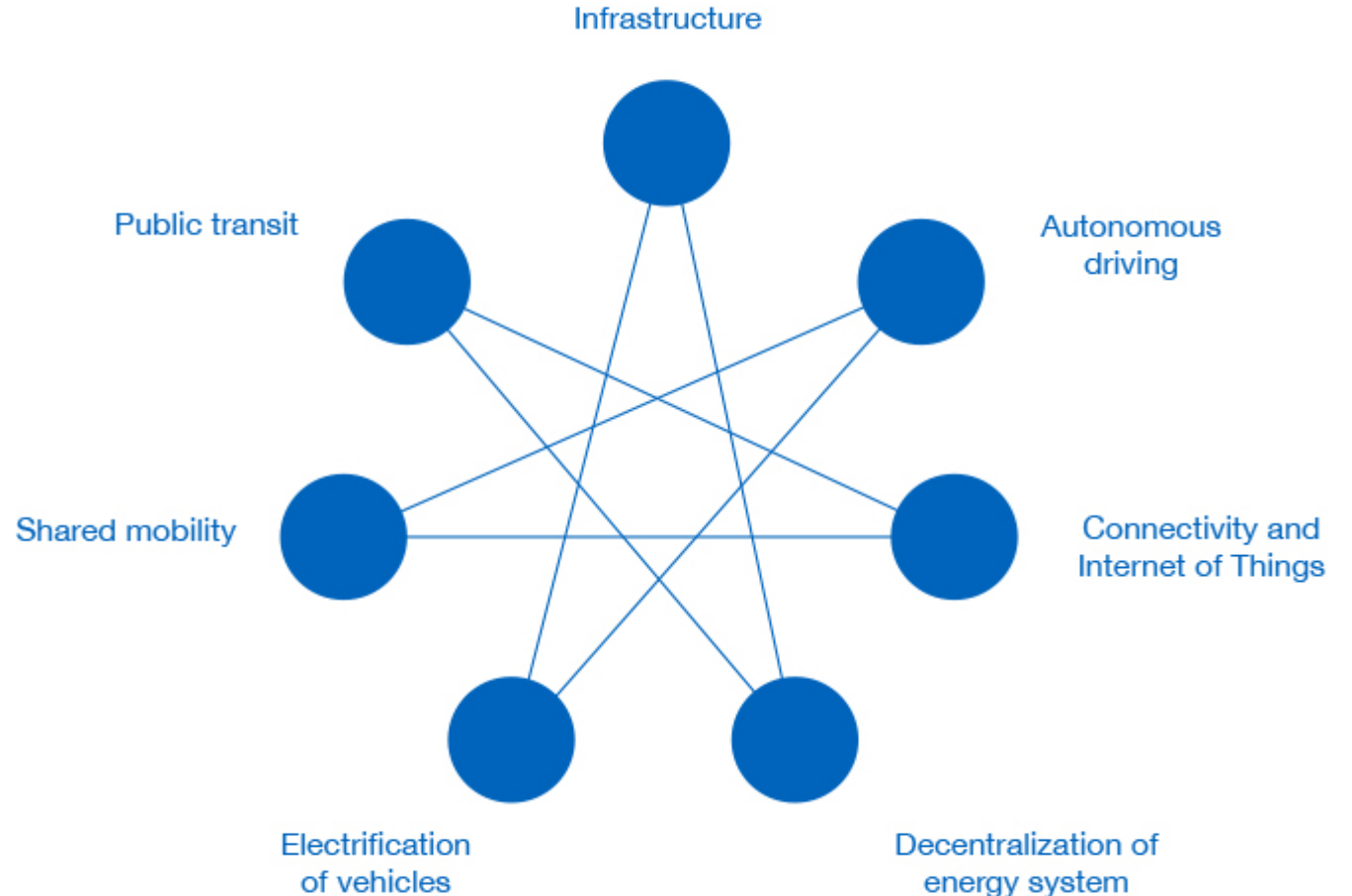
FUTURE MOBILITY

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‘We live in a time of unprecedented change in the transport system. Changes in the nature of working and shopping, new technologies and behaviours – such as automation, vehicle electrification and the sharing economy – are already having an impact on how the system functions, while the intersection of the physical and digital realms is changing how transport is planned and used.’

(The Future of Mobility,
Government Office for Science, 2019)

Integrated Trends (McKinsey Center for Future Mobility 2019)



DRIVERS

- Changes in transport technology
 - Data and connectivity, automation, cleaner transport, new modes
- Changes in demand for transport
 - Growth driven by population growth, generational preferences, consumer attitudes
- Changes in business models
 - Digitally enabled, shared mobility

BENEFITS AND RISKS

| | Benefits | Risks |
|---------------|---|--|
| Social | Safer streets, inclusive transport, smoother journeys, boosting active travel | Safety and security threats, risks to public transport, digital and financial exclusion, health and wellbeing, privacy risks |
| Environmental | Reducing emissions, tackling noise pollution, unlocking spatial opportunities eg. reducing parking, tackling congestion | Urban sprawl, disrupting the local environment, increasing congestion |
| Economic | Improved productivity, attracting investment, creating employment, boosting exports | Abuse of monopoly power, loss of jobs and need for new skills |

GOVERNMENT POLICY

– Industrial Strategy

- ‘We will become a world leader in the way people, goods and services move’
- Mission: Put the UK at the forefront of the design and manufacturing of zero emission vehicles, with all new cars and vans effectively zero emission by 2040

– Department for Transport Future of Mobility: Urban Strategy

- ‘Through a clear and collaborative approach to emerging transport technologies and services we can enable innovation to flourish and harness a once in a century opportunity to transport mobility for the better’

RESEARCH WORK

– Evidence and Analysis

- Stakeholder engagement to identify work already underway and evidence available
- Research – analysis of mobility trends specific to SCR
- Summary and map of SCR innovative mobility solutions that have already been delivered e.g. tram-train, clean bus technology, electric bus feasibility, integrated TravelMasters and ebike trials

– Foresight

- Stakeholder engagement to explore future technological and innovation trends, the most significant disruptions and the timeframes in which these are likely to occur, the potential impact on current policies and infrastructure planning and barriers to change
- Identifying key partners for SCR to engage as we develop this work
- Research – insight to identify extent to which SCR could growth strengths, exploit new areas, collaborate and export expertise

– Recommendations

- Recommendations for short, medium and long term actions for SCR aligned to HMG policy and principles

THANK YOU

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