

60-SECOND SUMMARY

While London's road transport is of foundational importance to the city's communities and economies, it causes a number of major problems. In 2010, the equivalent of 9,416 deaths were attributed to air pollution, and congestion exacted an estimated economic cost of £5.5 billion. This is the result of the type of transport modes available to Londoners, how they are used, and the systems that determine transport priorities. As such, one of the primary methods of reducing transport-related problems in London is the unprecedented modal shift towards more sustainable forms of transport that has occurred over the last decade or so.

In that time, digital technology has enabled the development of new transport services, including journey planners, car clubs and on-demand private hire. These new mobility services could interact within London's transport system to deliver positive network effects, including complementing efforts to enable more public and active transport, and so allow for an unprecedented opportunity to overcome negative outcomes, such as air pollution and congestion, and to improve the city's spaces and Londoners' lives. Evidence suggests that some of these services are already having a tangible positive effect, as, for example, is the case of car clubs, which are unlocking more sustainable travelling behaviours. Conversely, concerns exist over the potential for negative network effects that undermine the ongoing move toward more sustainable behaviour.

London is at a tipping point and needs to decide how to react to these changes. Indeed, the pace and reach of technological change is such that a window of opportunity currently exists in which action can be taken by London's government to ensure the positive potential of these services is realised. The chance of negative path dependency is intolerably high without action in this term. As such, the mayor should incorporate a vision for new transport technologies into the Mayor's Transport Strategy in which shared transport and digital technology realise their potential to drive positive transport outcomes. This vision should be defined by a clear set of objectives for London's overall transport network and include a framework through which this vision can be achieved. In doing so, he is offered a unique opportunity to formulate London's, and the UK's, role in responding to the digital revolution and realising the socioeconomic opportunities it affords.

KEY FINDINGS

- Road transport is the leading cause of a number of problems in London. These include air pollution, congestion, and the large opportunity cost in forgone spatial opportunities.
- The mayor of London and Transport for London (TfL) are seeking to affect a modal shift towards more sustainable forms of transport behaviour. This modal shift is occurring, with a 10.4 per cent net mode shift from private to public and active transport between 2000–2015. Public and active transport now account for about 64 per cent of all one-way commuter movements in London.
- Meanwhile, digital technology has enabled the rise of new models of personal transport services that help travellers to move from ownership of vehicles to their use as a service, including journey planners, car clubs, on-demand private hire, and other shared modes.
- New mobility solutions could help or hinder efforts to effect more sustainable forms of travel behaviour and are already having a tangible impact on London's transport system. Evidence suggests that, in the case of car clubs, for example, membership unlocks positive behaviour change, lowering car use, crowding in higher public and active transport use, and driving the uptake of cleaner vehicles.
- The potential positive benefits of effectively incorporating these services into transport networks are profound, but require the definition of those key objectives they should seek to meet, and the public policy framework through which public and private bodies can achieve them.

RECOMMENDATIONS

- The mayor of London should incorporate a vision and framework for new transport technologies into the *Mayor's Transport Strategy* in which shared transport and digital technology are able to realise their potential in driving positive transport outcomes. This framework should include:
 - An urgent audit of new mobility markets and their potential and future effects upon key transport-related outcomes.
 - A set of overall positive outcomes for London's transport system, and how each new service and mode can contribute to support the uptake of more sustainable travel behaviours.
 - The rapid development of an explicit framework for new mobility markets, in collaboration with operators of new mobility services.
 - The provision of guidelines for public bodies and private operators on how to best gain from new mobility markets and work within the new market framework.
- Car clubs should be a key part of the mayor's vision for London's transport system and so the Mayor's Transport Strategy should include measures for how car clubs can help achieve key transport objectives.
- TfL and boroughs should work with operators to develop borough-by-borough agreements to enable car club development.
- TfL should become the central intermediary for mobility data in London, acting as a neutral, third-party platform through which data is collated and equal access by all mobility operators is guaranteed.
- TfL should assess the potential for a mobility as a service (MaaS) platform market in London and develop recommendations for policy responses, including a market framework and the feasibility of a TfL MaaS platform.
- The mayor should mandate TfL to investigate the potential for a smart charging system and an integrated road pricing scheme in London.
- The mayor should introduce a new market framework for EV charging networks in London, including regulation to ensure their proper functionality, ubiquity, interoperability and fair access to mobility operators and users.
- The mayor should appoint a chief digital officer for London.

For the full report, including all references, data sources and notes on methodology, see:
www.ippr.org/publications/crossroads-choosing-a-future-for-londons-transport

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