

OUR FUTURE TRANSPORT SYSTEM

FUTURE TRENDS, THE LONG TERM VIEW & THE COMING NLTP



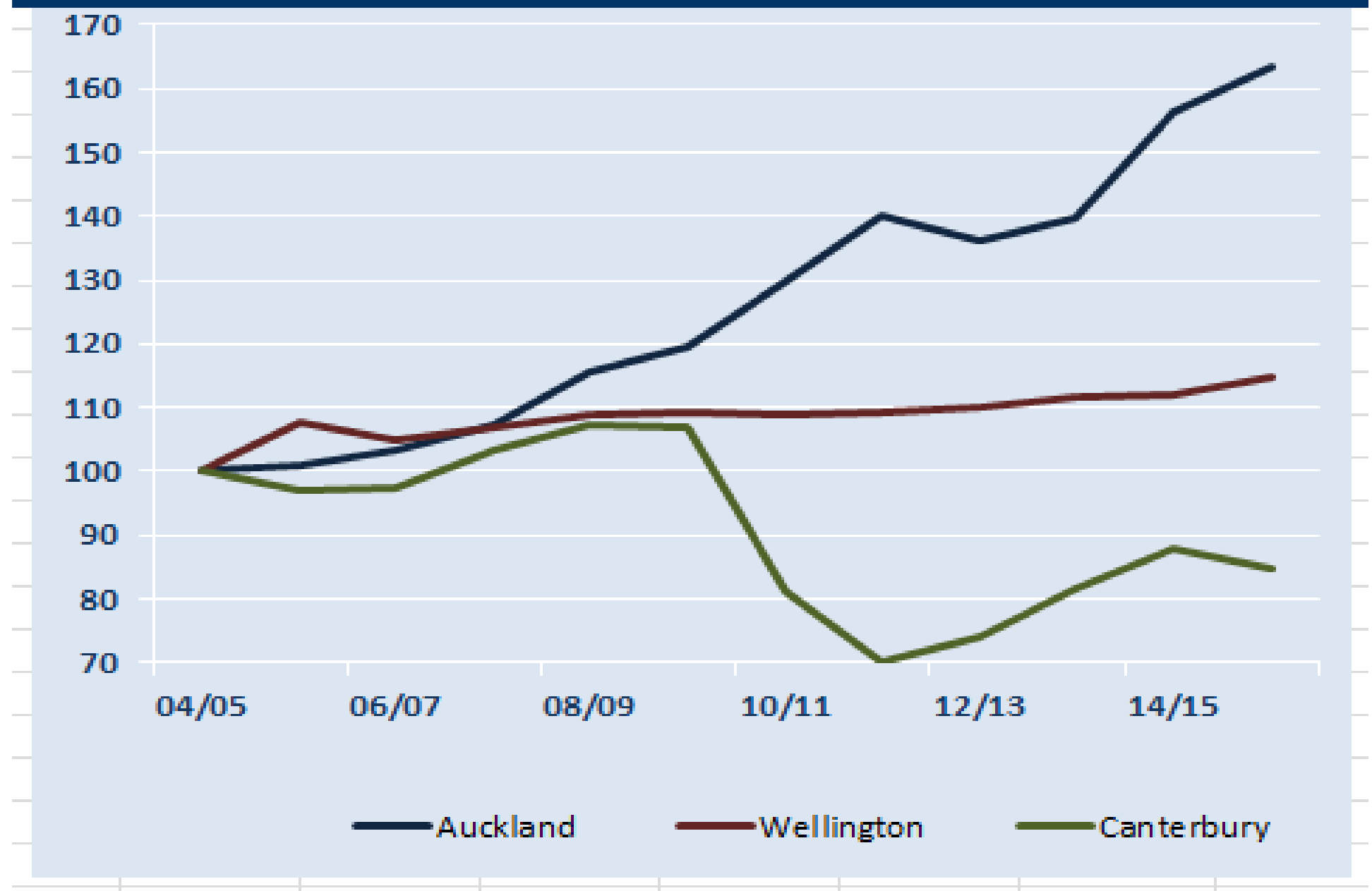
WHAT WE'LL COVER TODAY...

***Trendlines:** technology & population trends & expected pressures that are shaping the future of the network*

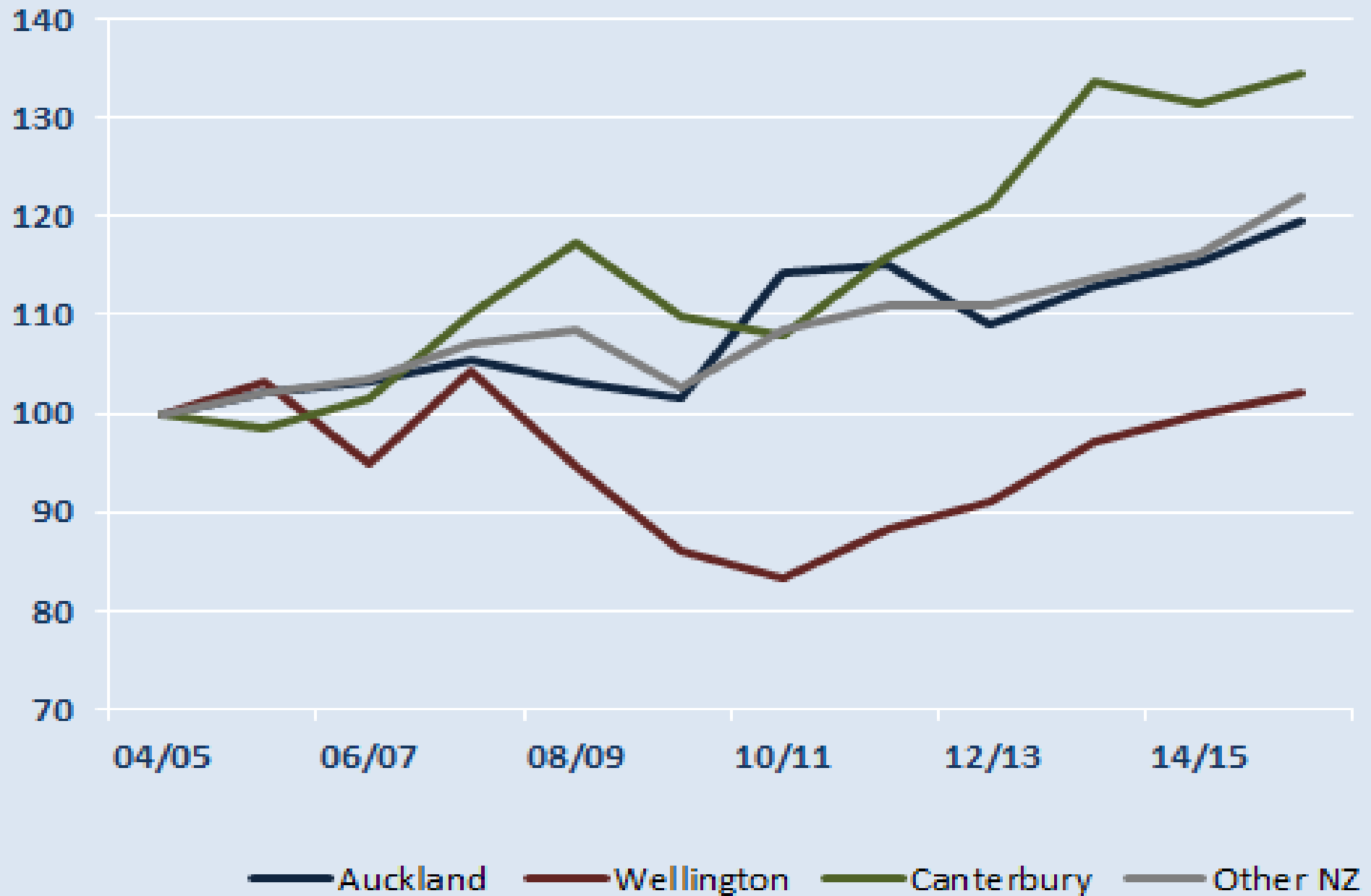
***What Effect This Has:** The future is more uncertain and less uniform than its been before. We need to work close together to create a whole of system view of the network.*

***The Coming NLTP:** This also means we're taking a different approach to the coming 2018-21 NLTP development.*

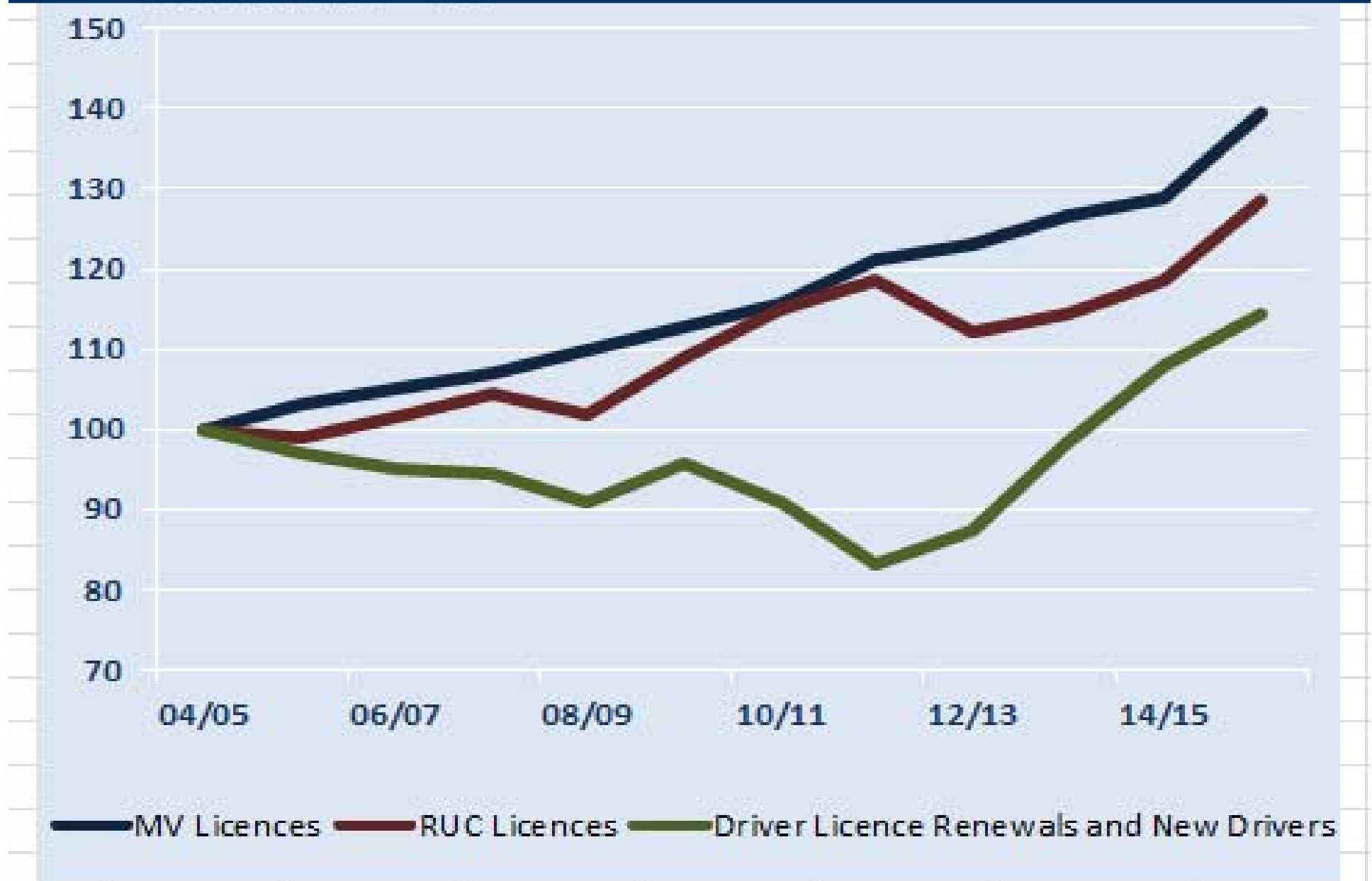
PUBLIC TRANSPORT



FREIGHT

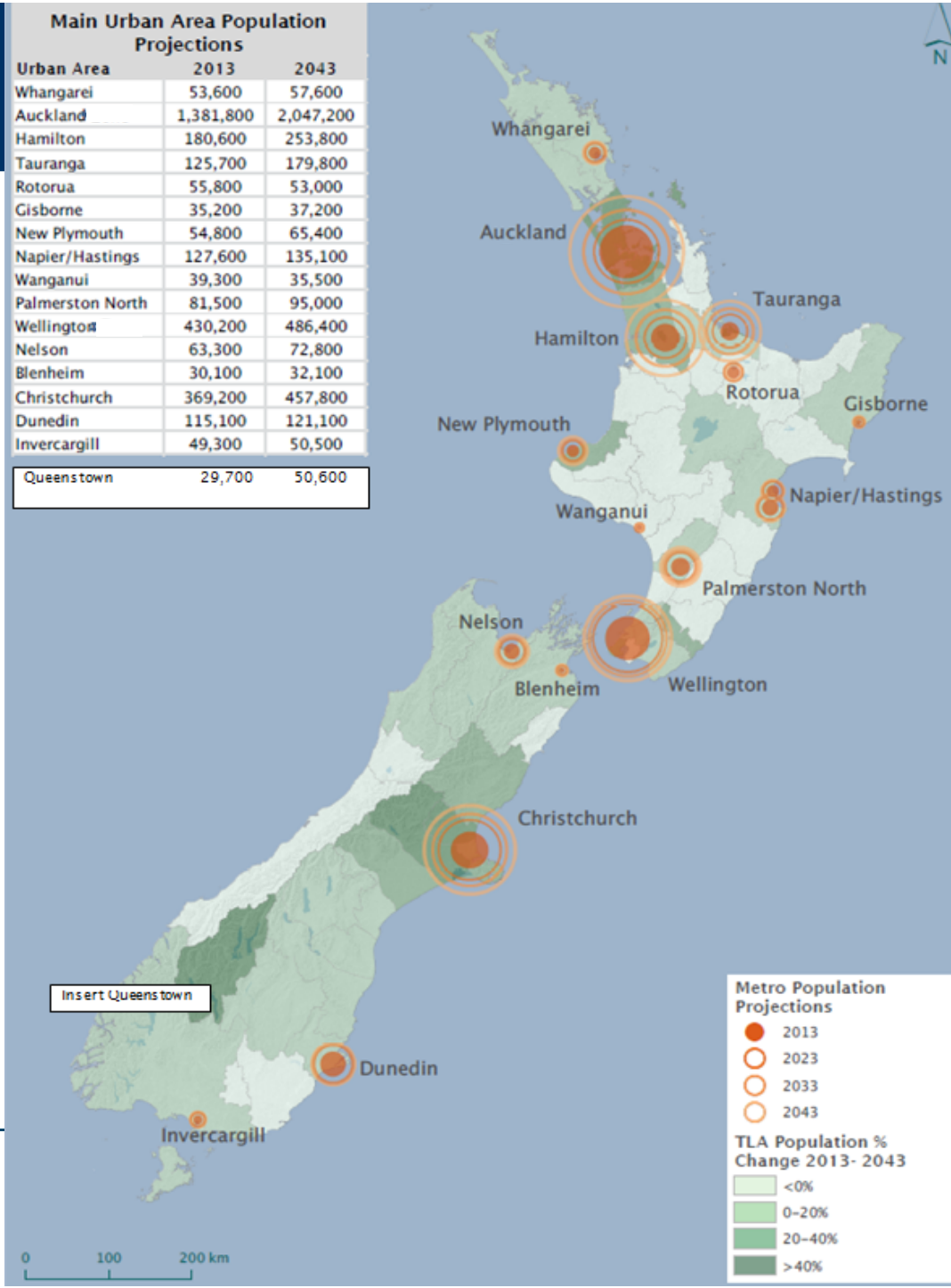


LICENSING & REGULATION



POPULATION

2013-2043

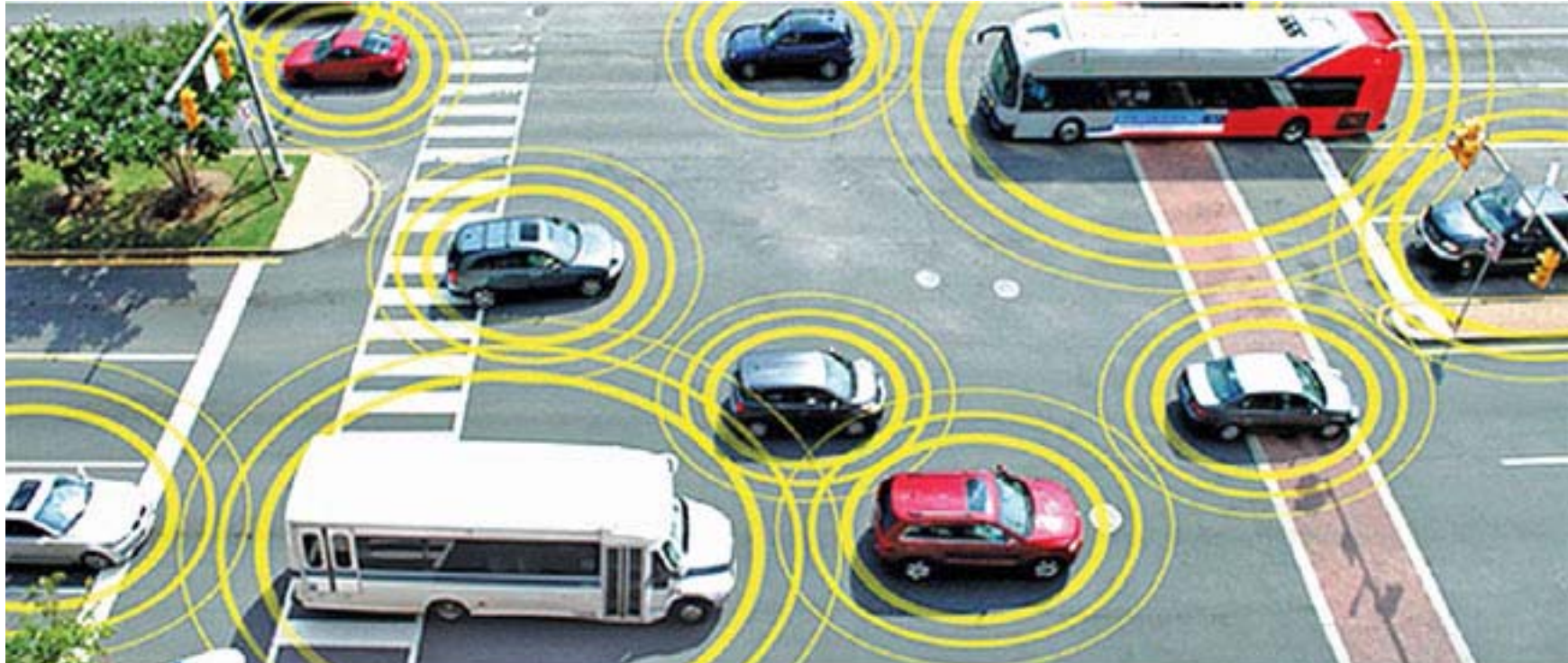


Future Trends & Likely Pressure Points

We're seeing growth - but not like before, it won't be everywhere



Building A Whole Of System View Together



- The pace of change is increasing, but it is also less uniform than before.
- No single organisation can tell the whole story
- We need to work together to build a whole of system view.

Mobility As A Service: What The Future Looks Like...



Technology is changing the landscape

- *We are on the cusp of a transport revolution*
- *Vehicles are changing*
- *Ownership models are changing*
- *Fee structures are changing*

Mobility As A Service: What The Future Looks Like...



An integrated transport system that operates as a connected whole

- *Integrated data, real-time information, digitally networked and available to customers wherever and whenever they need.*

DEVELOPING THE 2018-21 NLTP TOGETHER

A NEW APPROACH...

- ***Not broadcasting 'our' investment signals***
- ***Working collaboratively with stakeholders to improve the NLTP process***
- ***Convening a series of two-way, progressively detailed conversations & dialogues together***
- ***The first round of conversations – the November NLTP Dialogues – are live now***
- ***Further rounds of dialogue will follow in Feb 2017 and mid 2017***

DEVELOPING THE 2018-21 NLTP TOGETHER

A NEW APPROACH...

- *Provided initial content as a STARTING POINT for conversations*
- *Developed in direct response to feedback*
- *Further feedback will form the basis for each following round of NLTP dialogues*
- *This approach recognises we'll only succeed by working together*