

Moving mobility forward

The winds of change, the unchangeable forces and the challenges ahead for mobility organizations



30%

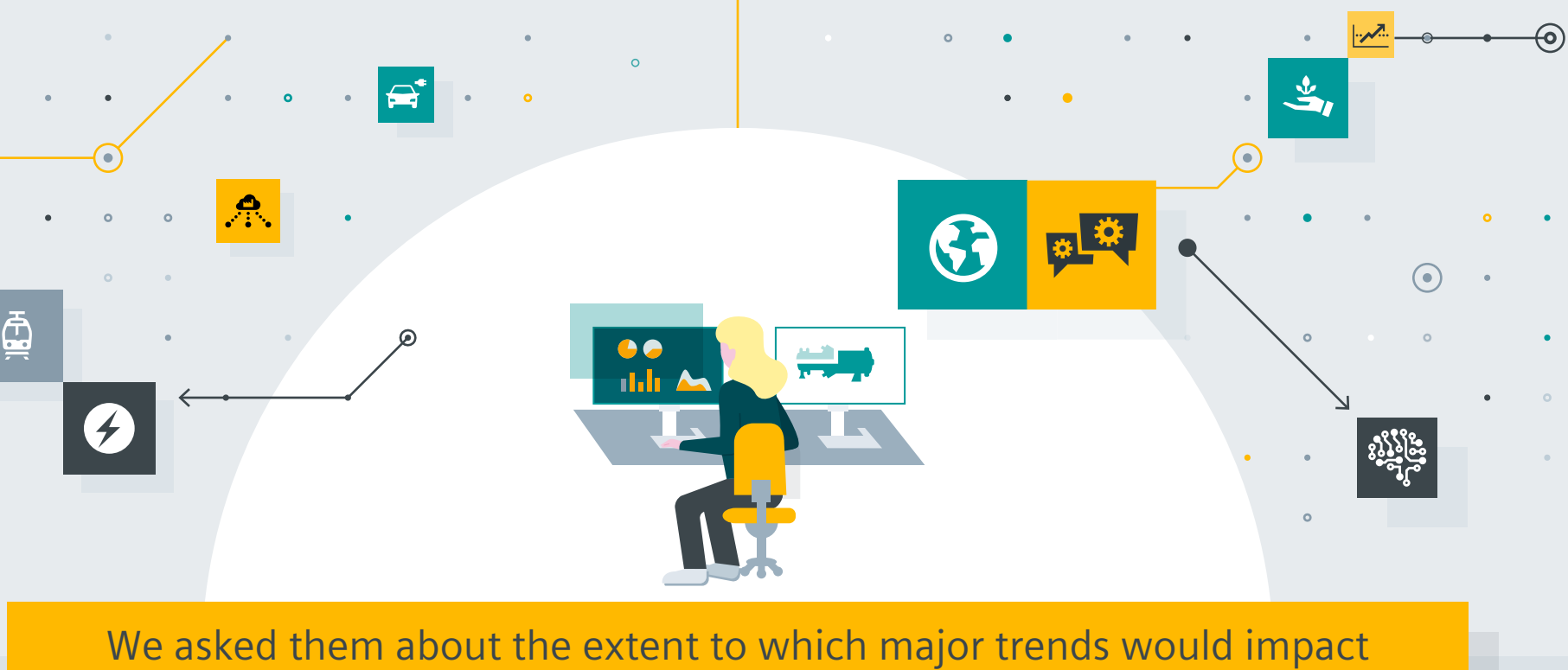
Rail infrastructure, operations, maintenance and specialist services (including passenger, freight, intercity, commuter, high-speed, light rail, etc)

16%

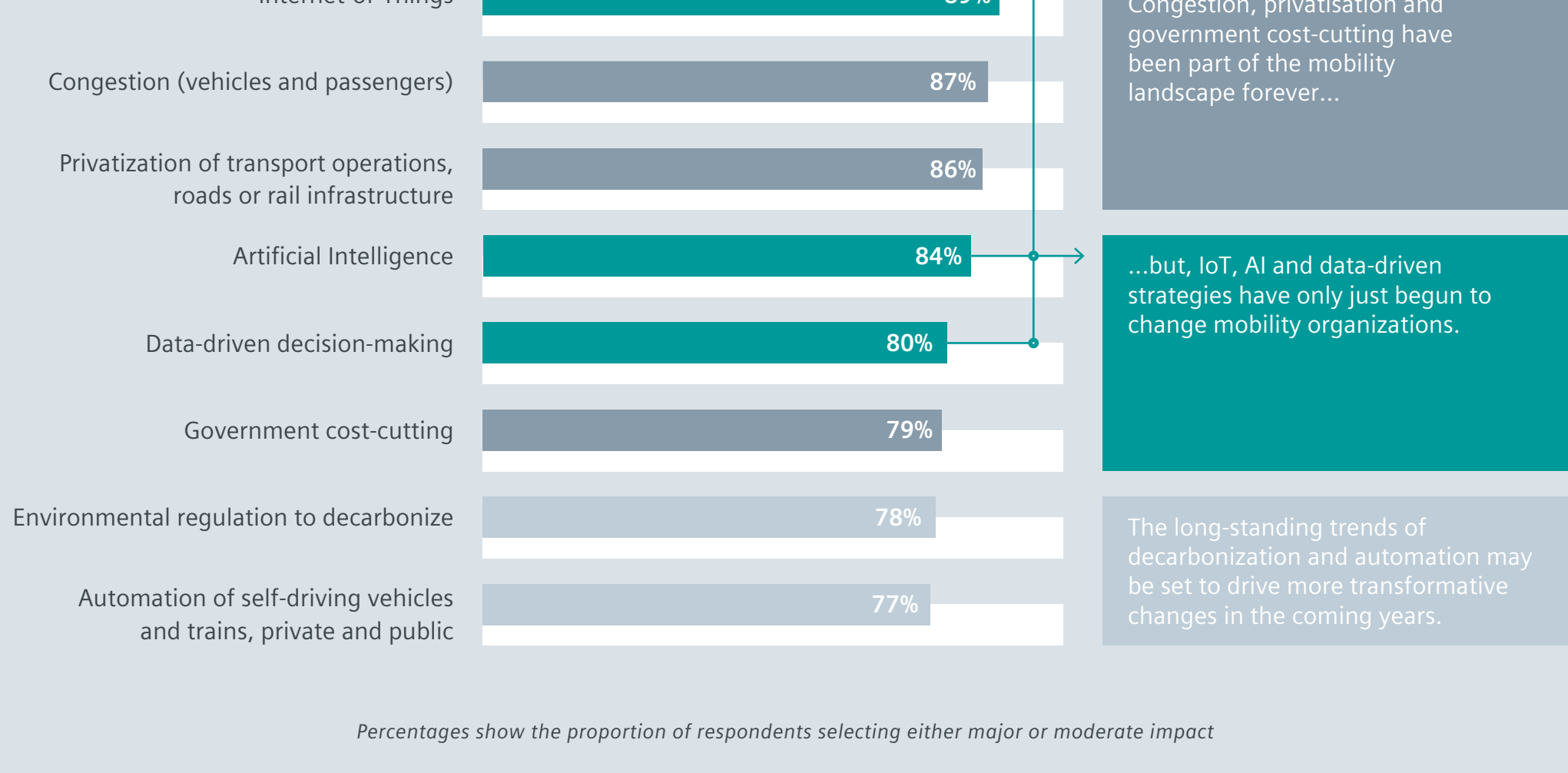
Road infrastructure (including traffic management, highways, parking, tunnels, markings, safety, signage, street lighting, etc)

53%

Public transit/transport authority, public or private multi-modal transport services



We asked them about the extent to which major trends would impact their organization's strategy over the next three years...

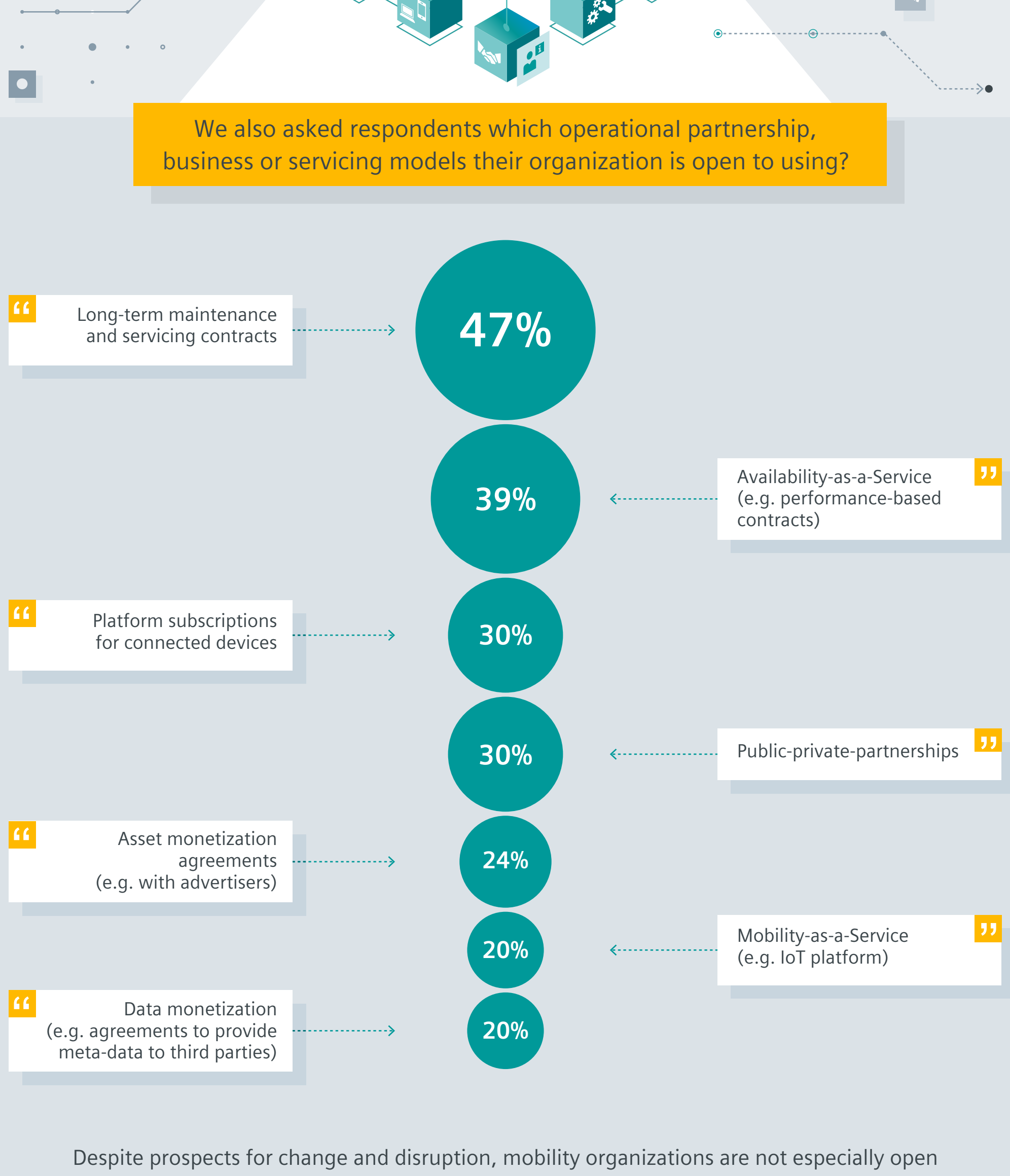


Congestion, privatisation and government cost-cutting have been part of the mobility landscape forever...

...but, IoT, AI and data-driven strategies have only just begun to change mobility organizations.

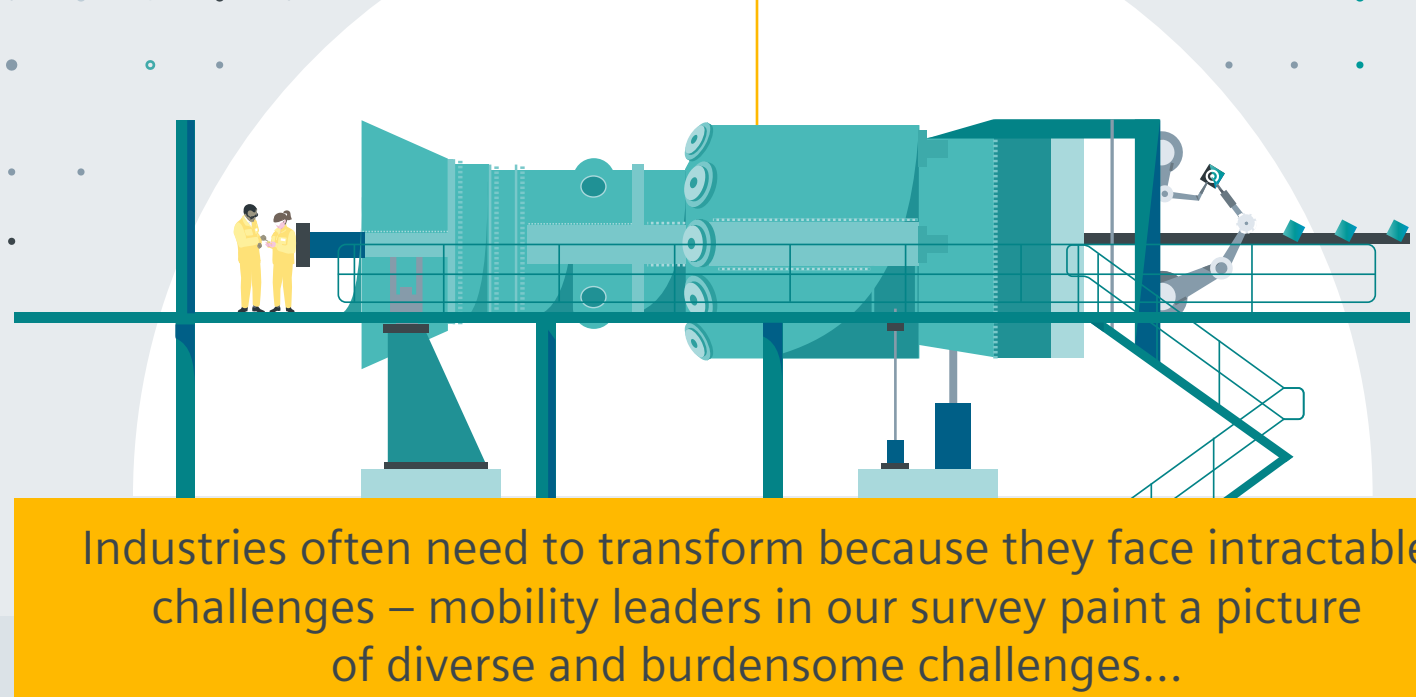
The long-standing trends of decarbonization and automation may be set to drive more transformative changes in the coming years.

We also asked respondents which operational partnership, business or servicing models their organization is open to using?



Despite prospects for change and disruption, mobility organizations are not especially open to less-conventional operational models, partnerships and servicing arrangements.

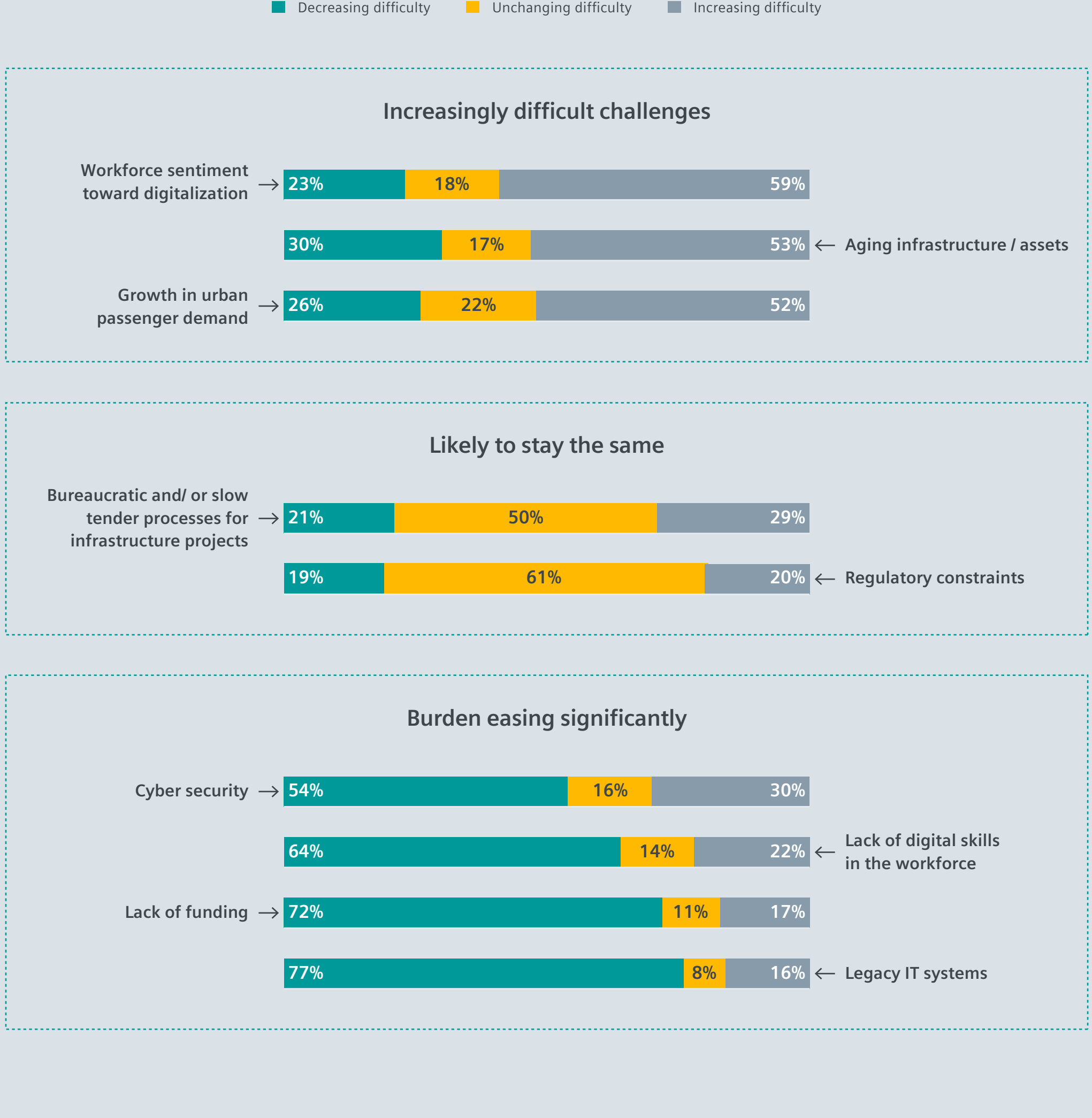
Does this suggest many in the industry are too conservative for the times? Is greater openness to new models needed to overcome the challenges ahead?



Industries often need to transform because they face intractable challenges – mobility leaders in our survey paint a picture of diverse and burdensome challenges...



...and our best window – or not changing – comes from how challenges are expected to evolve over the next two years...



1 Growth in urban passenger demand and aging infrastructure/assets are both among today's top challenges, which indicates that significant change, expansion and rejuvenation work is required.

Digitalization is often part of such work, but that looks to be an area of increasing stress, with the challenge of workforce sentiment to digitalization expected to increase more than any other.

2 In light of this, it is positive to see that organizations are largely expecting to overcome the challenges of legacy systems, insufficient funding and digital skills shortages – all of which should help in tackling the rising challenges.

The results also suggest that, while there is significant change – like, there are still some challenges – aged regulations and bureaucracy – that are likely to survive the test of time.