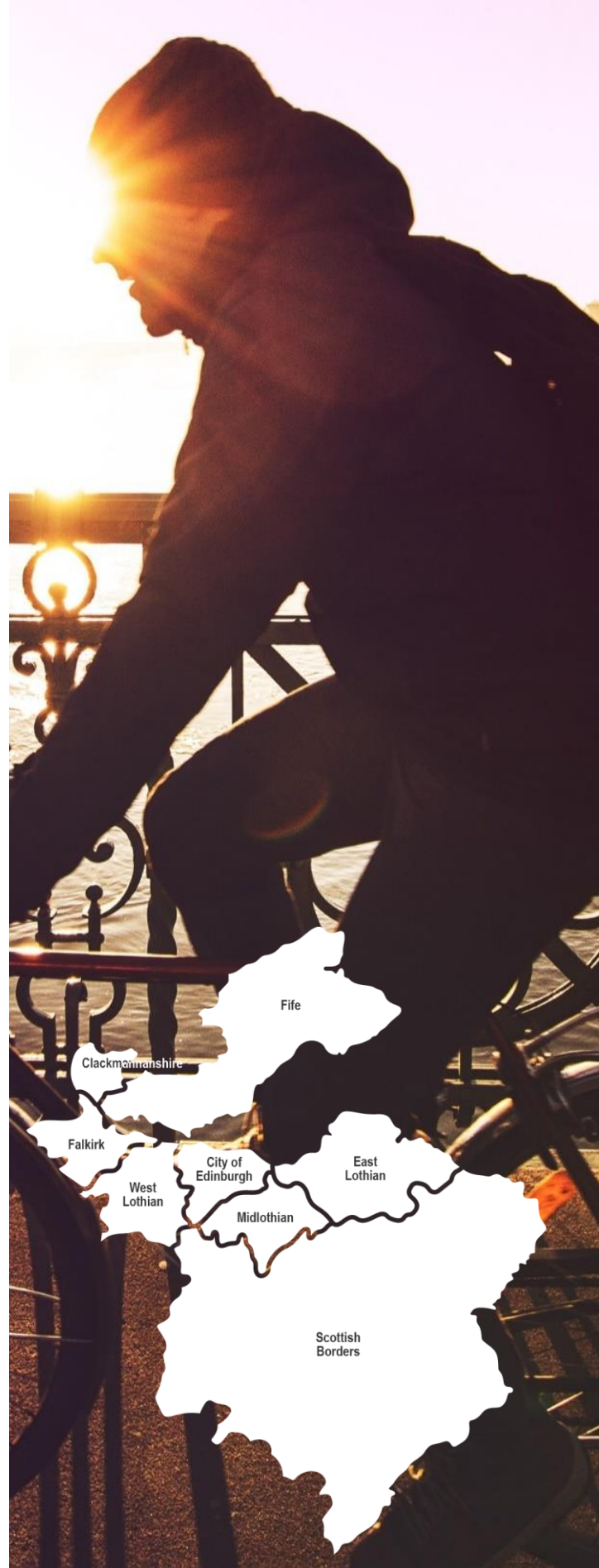# ACTION PLAN FOR THE SOUTH EAST OF SCOTLAND

Date: **26 April 2022**
Partner: **SEStran**

GO
SEStran

South East of Scotland
Transport Partnership

PriMaaS ACTION PLAN

PARTNER ORGANISATION**: SEStran**

OTHER PARTNERS / ORGANISATIONS INVOLVED:

IBI Group

Tactran

Scottish Borders Council

COUNTRY: **United Kingdom**

NUTS2 REGION**: South East of Scotland**

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€1,563,660.00

from **1 Aug 2019** to **31 Jul 2023**

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EXECUTIVE SUMMARY

SEStran is the South East Scotland Transport Partnership, containing eight council areas and home to 28% of Scotland's population. The new **Regional Transport Strategy (RTS)** draws on new policy frameworks spanning national, regional and local levels.

Of particular importance is the National Transport Strategy 2 (NTS2), published in February 2020, which set the future direction for transport in Scotland for the next 20 years. The NTS2 was the driver for the £2 million **Transport Scotland MaaS Investment Fund**, from which SEStran was successful in securing funding.

The new RTS provides a strategic framework for transport management and investment for the SEStran area over a 10-15 year period, addressing the wide-ranging problems and issues of the region. This is a diverse area covering urban centres, such as the City of Edinburgh, as well as large sparsely populated rural areas. The RTS delivers a transformative strategic framework containing 29 Transport Planning Objectives linked to the following Strategy Objectives:

1. Transitioning to a sustainable, post-carbon transport system

2. Facilitating healthier travel options

3. Transforming public transport connectivity and access across the region

4. Supporting safe, sustainable and efficient movement of people and freight across the region

Enhancing the integration between modes reduces barriers to interchanging between different transport types. This is often perceived as a significant impediment to users. Through the RTS policies, actions and interventions, SEStran aims to make travelling by public transport and active travel more attractive for a wider range of journeys and reduce the high levels of car dependency.

The PriMaaS Regional Action is to **develop a** MaaS scheme for the SEStran region: **The GO SEStran Project**. The project will deliver:

- a multi-modal **Mobility as a Service (MaaS) plug-and-play platform** that will be piloted initially in East Lothian and the urban area of Musselburgh and its surroundings, offering a scalable platform layer integrating transport operators as well as third party data sources

- digitally enabling the integration of multiple modes at **Brunton Hall multimodal Journey Hub** (including rail, bus, taxi, DRT, Community Transport, micro mobility hire and car club)

- **Integration into the MaaS platform of tech-enabled Demand Responsive Transport** in East Lothian with the creation of a DRT zone on a particularly rural part of an existing bus route

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The project requires multi stakeholder cooperation and the Go SEStran partner organisations and roles are:

- **Transport Scotland** - Project funder and overall project governance

- **SEStran** - Overall Project Manager, developing the brief and specification

- **East Lothian Council** - Transport Authority delivering supported bus service, and supporting and promoting the MaaS platform

- **Fuse** – Tech provider and MaaS integrator

- **Tactran** - Regional Transport Partnership involved in a current MaaS platform trial

- **Prentice Buses** – Local bus operator providing DRT service to be trialled through the MaaS platform

- **DRT tech provider** – providing DRT software

The current project is programmed to run from April 2022 to December 2022, jointly funded by SEStran and the Transport Scotland MIF, with plans to identify and secure future funding beyond 2022.

Underpinning the GO SEStran implementation and delivery are the communication, monitoring and evaluation elements. To achieve effective stakeholder learning and communication SEStran will build on existing collaborative working and establish an **Open Learning Network** for the region where member stakeholders will have:

- leader and follower roles, with all stakeholders invited to both ask questions and share experience from what has been done, or what aspirations there are for others

- access to quarterly technical notes and dashboards (linked to the Monitoring and Evaluation Plan) to share the lessons being learnt.

The **Monitoring and Evaluation Plan** will identify if the following strategic challenges have been addressed by the project:

- Digital integration

- Physical integration

- Transport poverty

- Siloed nature of national, regional and local transport systems

The new SEStran RTP addresses the region's mobility challenges for the next 10-15 years and creates a suitable policy framework to support the implementation, monitoring and evaluation of MaaS, including the GO SEStran project.

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LETTER OF SUPPORT

See Addendum to this Regional Action Plan.

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1 Background and Policy Context

SEStran is the South East Scotland Transport Partnership. SEStran contains eight constituent council areas – City of Edinburgh, Clackmannanshire, East Lothian, Falkirk, Fife, Midlothian, Scottish Borders and West Lothian (see Figure 4), within an area of 3,180sq miles and is home to 28% of Scotland's population. A key requirement of SEStran is to develop a statutory Regional Transport Strategy (RTS) to provide a strategic framework for transport management and investment for the Partnership area over a 10-15 year period.

1.1   Policy Context

The new Regional Transport Strategy sits within and is being developed in the context of a policy hierarchy which spans the national, regional and local levels. This is illustrated in **Error! Not a valid bookmark self-reference.** along with some of the key policy documents.
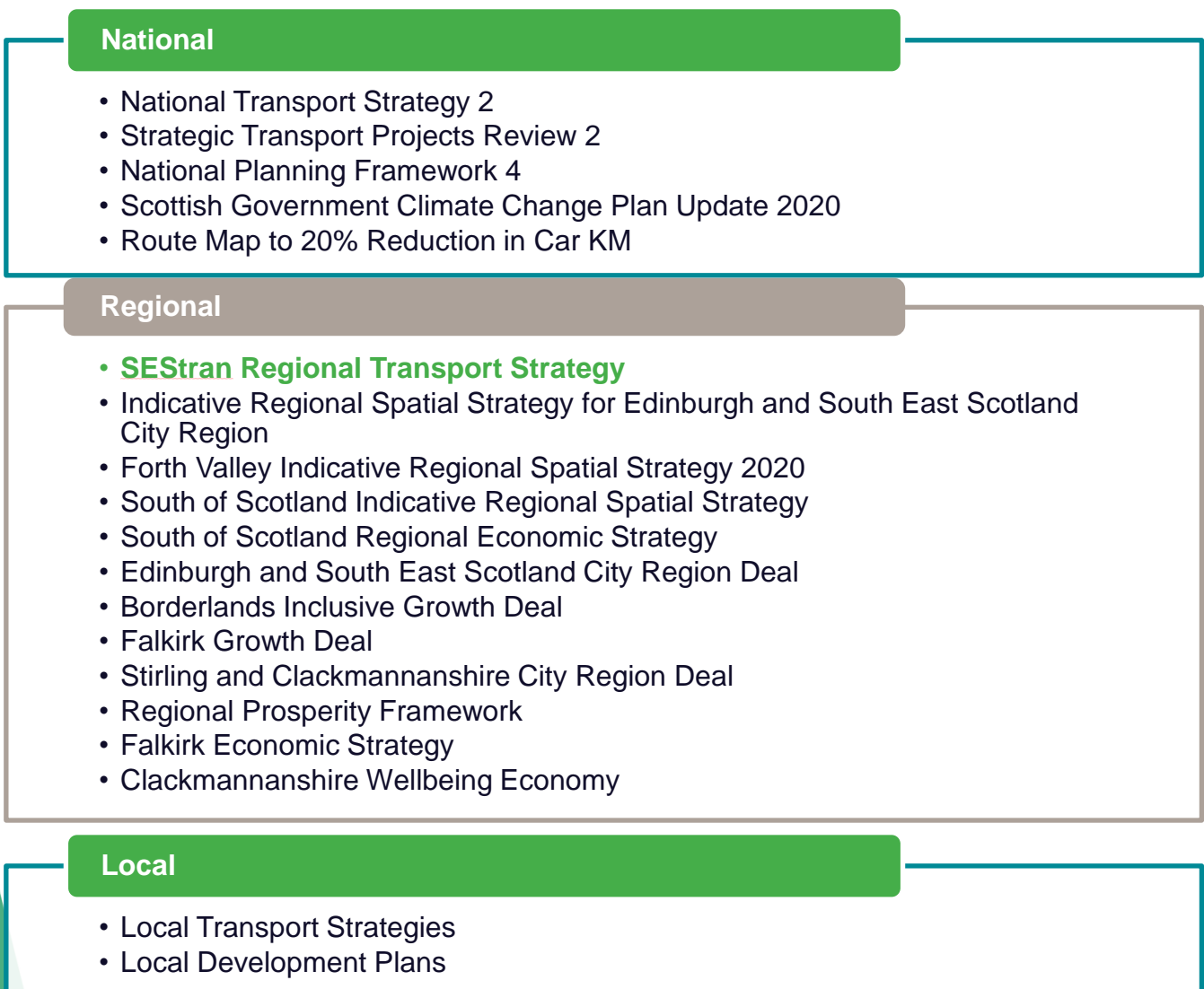
National

- National Transport Strategy 2
- Strategic Transport Projects Review 2
- National Planning Framework 4
- Scottish Government Climate Change Plan Update 2020
- Route Map to 20% Reduction in Car KM

Regional

- **SEStran Regional Transport Strategy**
- Indicative Regional Spatial Strategy for Edinburgh and South East Scotland City Region
- Forth Valley Indicative Regional Spatial Strategy 2020
- South of Scotland Indicative Regional Spatial Strategy
- South of Scotland Regional Economic Strategy
- Edinburgh and South East Scotland City Region Deal
- Borderlands Inclusive Growth Deal
- Falkirk Growth Deal
- Stirling and Clackmannanshire City Region Deal
- Regional Prosperity Framework
- Falkirk Economic Strategy
- Clackmannanshire Wellbeing Economy

Local

- Local Transport Strategies
- Local Development Plans

Figure 1: Policy Hierarchy

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In particular, the RTS is being developed within the policy framework provided by **the National Transport Strategy 2** which was published in February 2020. The MaaS concept supports the National Transport Strategy 2. The strategy is a catalyst for change and sets the future direction for transport in Scotland over the next twenty years. Its vision is that "we will have a sustainable, inclusive, safe and accessible transport system helping deliver a healthier, fairer and more prosperous Scotland for communities, businesses and visitors". It set out four strategic priorities, Figure , as well as defining a Sustainable Travel Hierarchy as shown in Figure . These four priorities and hierarchy have been used to guide the development of this RTS.

Figure 2: National Transport Strategy Priorities
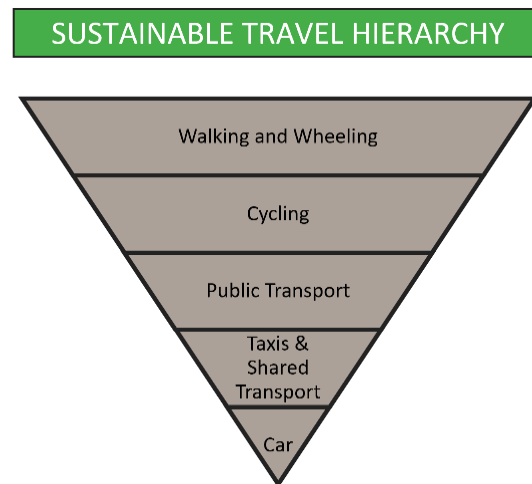
Figure 3: Sustainable Travel Hierarchy

The Sustainable Travel Hierarchy is also an important aspect of the **Strategic Transport Projects Review 2 (STPR2)**. Published in March 2022, this provides an overview of transport investment, mainly infrastructure and other behaviour change recommendations, that are required to deliver the National Transport Strategy priorities and objectives of the Review.

STPR2 recommends that pilot schemes involving DRT and MaaS draw on innovative solutions, international best practice and smart technologies. These schemes will help to establish whether scarce existing resources could be better utilised across the public network, home to school transport, special educational needs travel and non-emergency patient travel, either on the basis of fixed route services or through flexible routeing.

Alongside this the Scottish Government has also set out ambitious targets to help achieve its overarching target of net zero emissions by 2045. In particular, the **Climate Change Plan Update** published in December 2020 outlined that by 2030:

• our roads will contain no new petrol and diesel cars and vans
• car kilometres will have reduced by 20%

This policy context has been used to guide the development of the RTS.

1.2　MaaS Investment Fund

To support the testing of the MaaS concept in Scotland, the Scottish Government committed to a £2 million investment fund over three years in its 2018 Programme for Government. The Scottish Government recognised the potential to transform the way we use transport – making public and shared transport options as desirable as owning our own car. The funding, the **MaaS Investment Fund (MIF)**, was used to facilitate growth and innovation in this area, building on strengths and skills already in Scotland and complemented existing work on smart ticketing.

Funded projects support Scotland's green recovery, seeking to make public transport easier to use and encourage people away from single-occupancy car trips by providing digital access to travel information, so they can be better informed about different ways to plan, undertake and pay for journeys.

Potential MIF projects had to be delivery focussed, addressing a challenge in the Scottish marketplace and show a minimum viable product MaaS service/solution that could be applied within the realm of Scotland's public transport travel networks.

Round 1 of the MIF was officially launched in June 2019 and the first three projects to be supported through the MIF fund were announced in late 2019 and early 2020. Round Two Funding (MIF2) was launched in early 2021 for the period 2021/2022. SEStran was successful in its application, enabling initiation of the GO SEStran project to use MaaS and technology enabled DRT to improve physical and digital integration and address transport poverty.

1.2.1　MaaS Scotland

MaaS Scotland is the focal point for MaaS activities in Scotland, establishing a formal network for the vibrant Scottish MaaS eco-system, and facilitating initiatives (including the MIF projects) that will deliver the benefits of this transformational opportunity to Scotland.

In their 2018 White Paper, MaaS Scotland advocated direct support of the Scottish Government, and establishment of MaaS Delivery Fund. MaaS Scotland described this type of funding as vital to secure industry confidence, evidence Government commitment and leveraging national and international private sector investment[1].

MaaS Scotland is a joint venture, operated by Technology Scotland and ScotlandIS, the group has made significant progress over the past 5 years, growing to a membership of over 75 public and private sector organisations from across the MaaS supply chain making it the largest network of its kind in Europe.

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[1] MaaS Scotland White Paper Mobility as a Service: Positioning Scotland for an Emerging Global Market https://maas-scotland.com/maas-scotland-announces-new-publication-positioning-scotland-for-an-emerging-global-market/

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Through membership of MaaS Scotland Sestran benefit from exchange, learning and a strong cluster of companies who can supply products and services along the MaaS value chain in partnership with the public sector.

1.3   SEStran Regional Transport Strategy

The Regional Transport Strategy (RTS) for the South-East of Scotland has been prepared by the South-East of Scotland Regional Transport Partnership (SEStran) which was set up under the Transport (Scotland) Act 2005. It covers eight constituent local authorities as shown in Figure 4. This Act also set the requirement to produce a statutory RTS to provide a strategic framework for transport management and investment for the Partnership area.

The RTS has been prepared to replace the Regional Transport Strategy 2015 -2025 Refresh published in July 2015. It replaced the original SEStran Regional Transport Strategy 2008 – 2023 published in November 2008.

It is essential that the RTS addresses the transport problems and issues being experienced in the SEStran area. The purpose of this RTS is to set out these challenges and how SEStran proposes to respond to them and to provide an opportunity for consultation and engagement prior to finalising the strategy.

Figure 4: SEStran Location Plan

This RTS has been prepared in accordance with RTS development guidance (Transport Scotland, 2006), the Scottish Transport Appraisal Guidance (STAG) and all relevant legislative and policy requirements. It is supported by a suite of evidence drawn from published policy documents, data analysis as well as stakeholder and public consultation. This has been set out in the documentation accompanying the development of the RTS. This includes a STAG Case for Change report which details the problems and issues that need to be tackled by the RTS as well as defining options to address them along with the strategy objectives. The options which emerged from the Case for Change also underwent appraisal with the findings outlined in the STAG Preliminary Options Appraisal report.
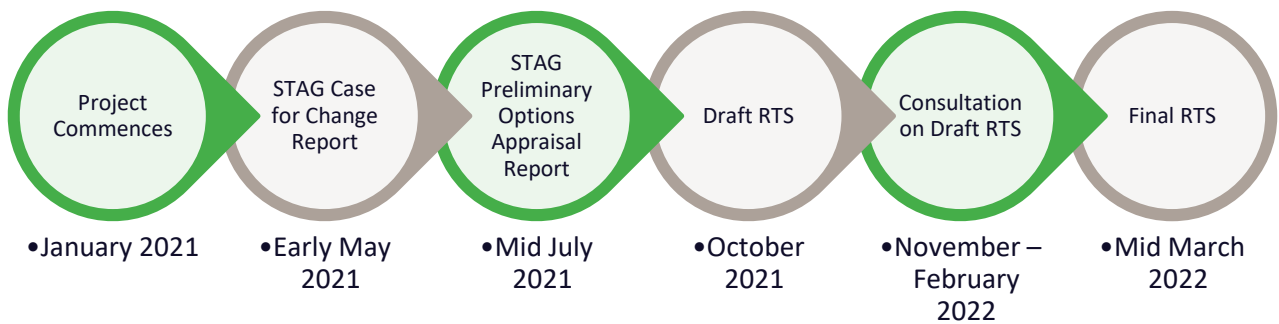
The preparation of the new SEStran RTS has also been informed by Strategic Environmental Assessment (SEA) and Equalities Impact Assessment (EqIA) processes, each of which has identified key environmental and equalities issues which need to be addressed in the new RTS. This RTS is accompanied by proportionate SEA and Equalities Duties Assessment Reports which consider how relevant equalities and environmental issues have been taken account of to date and provides recommendations to inform the finalisation of the RTS. These processes along with their associated timescales are illustrated in Figure .

It also draws upon the findings of the SEStran Main Issues Report published in June 2020. This was substantially prepared prior to the COVID-19 pandemic and therefore primarily reflects pre-pandemic problems and issues. As such, the STAG process has sought to ensure that the RTS is developed upon an evidence base which reflects the latest understanding of problems and issues in the region. Travel behaviour has changed during the pandemic as in many cases most people were made to work from home with many companies now introducing a work from home or hybrid model which will reduce the number of people commuting to work.

All interventions to be brought forward from this RTS will be developed to ensure efficiency and value for money, and take a whole life cycle approach to cost, accounting for future maintenance requirements. Further, as SEStran's RTS covers a period of extensive societal and behavioural change and rapid technological advancement the policies are designed to be adaptable and flexible.


Figure 5: RTS process timescale

Interventions will also therefore respond to new opportunities that arise. For example, taking advantage of opportunities from societal changes and advances in technology and engineering to tackle congestion and lower demands for car-based travel can provide the basis for reallocating road space and delivering a more efficient use of the transport network. This can help improve public transport operations and provide for greater levels of mobility.

1.4   Profile

The SEStran region covers 8,400km^2 which is just over 10% of Scotland's landmass. It is hugely diverse and includes areas which fall into every one of the Scottish Government's six-fold urban-rural classification. The total population of the SEStran area was estimated as 1,609,070 in 2019. The majority of the population is concentrated in the centre of the SEStran area with a large, sparsely populated rural area to the south in the Scottish Borders and parts of Midlothian and East Lothian. The greatest concentration of population is within the City of Edinburgh which accounts for approximately 33% of the total SEStran region population. Figure illustrates the breakdown of the region using the Scottish Government's 6-fold urban – rural classification which highlights how much of the area is classified as rural. The RTS therefore has a focus on both urban and rural areas across the region.
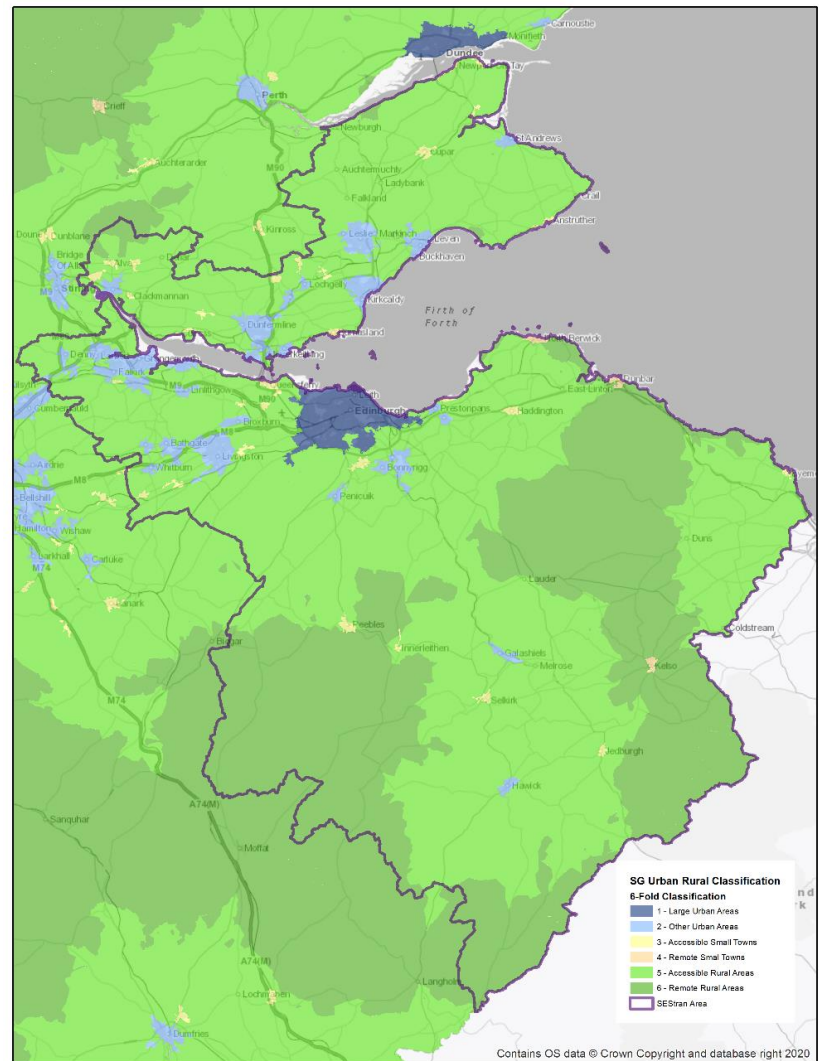
Figure 6: The Scottish Government's 6-fold urban – rural classification

1.5 Vision

The vision for the RTS has been developed to reflect new national, regional and local policy priorities. It sets out the type of region we want the South East of Scotland to be and how transport can contribute to achieving that for everyone. The vision also shapes the strategy objectives by providing a high-level context and long-term focus for the strategy:

> *A South-East of Scotland fully integrated transport system that will be efficient, connected and safe; create inclusive, prosperous, and sustainable places to live, work and visit; be affordable and accessible to all, enabling people to be healthier; and delivering the region's contribution to net zero emissions targets.*

Alongside this is SEStran's aim as an organisation, which is to make sustainable modes of transport easier, more appealing to use and more accessible.

1.5.1 Strategy Objectives

Drawing upon the problems outlined in the RTS a series of 29 Transport Planning Objectives (TPOs), each linked to a specific problem, were identified. These were subsequently used to define four Strategy Objectives which provide the transformative strategic framework for the RTS to provide a step change for transport in the region. These are set out below along with the societal outcomes that they will deliver. Key Performance Indicators (KPIs) linked to the Strategy Objectives that can be used for the purposes of monitoring and evaluation of the strategy are provided.
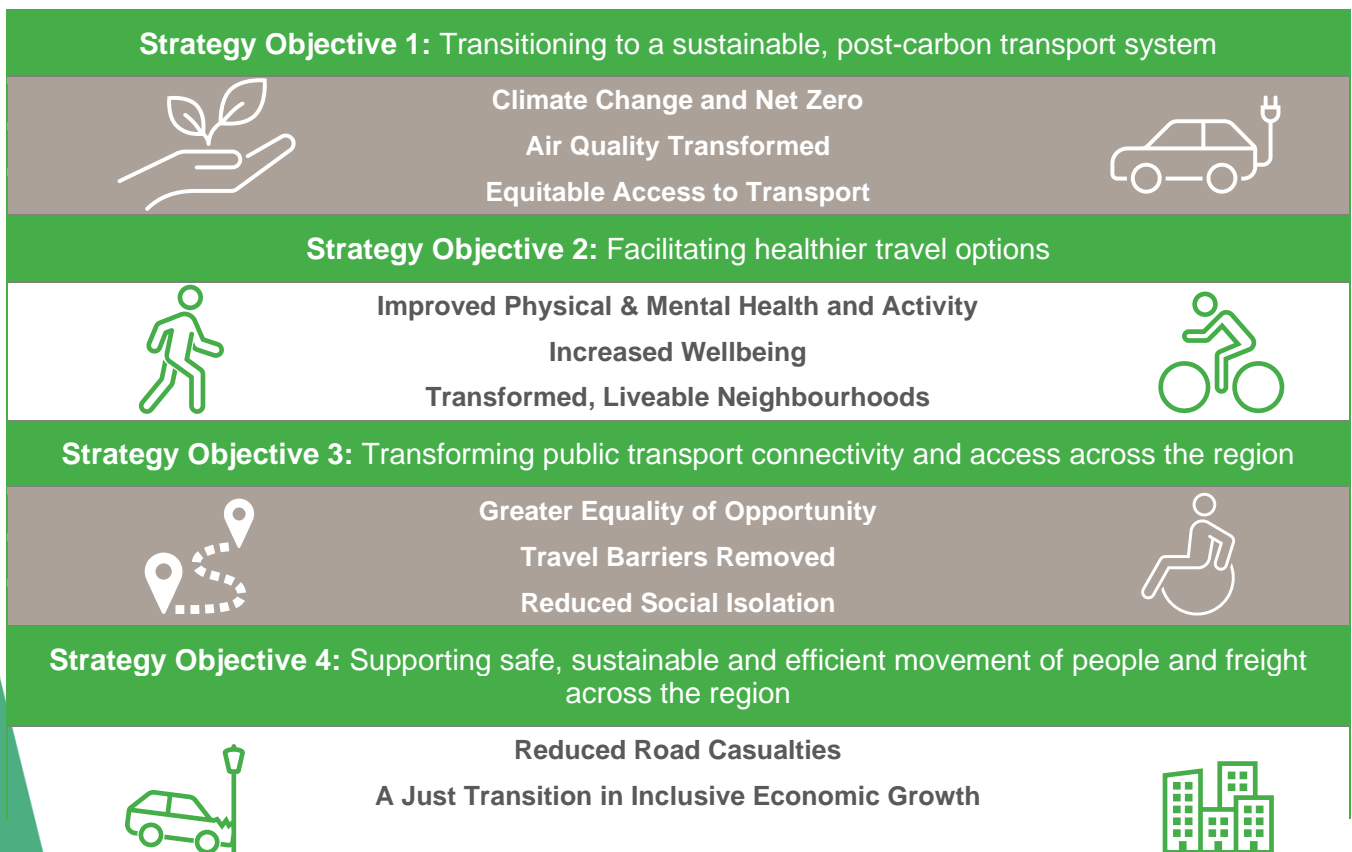
Strategy Objective 1: Transitioning to a sustainable, post-carbon transport system

Climate Change and Net Zero

Air Quality Transformed

Equitable Access to Transport

Strategy Objective 2: Facilitating healthier travel options

Improved Physical & Mental Health and Activity

Increased Wellbeing

Transformed, Liveable Neighbourhoods

Strategy Objective 3: Transforming public transport connectivity and access across the region

Greater Equality of Opportunity

Travel Barriers Removed

Reduced Social Isolation

Strategy Objective 4: Supporting safe, sustainable and efficient movement of people and freight across the region

Reduced Road Casualties

A Just Transition in Inclusive Economic Growth

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Figure 7: RTS Strategic Objectives

1.6   Expected Results

Enhancing the integration between modes reduces the barriers to interchanging between different types of transport which is often perceived as a significant impediment to users, and will lead to a transformational change in how the transport network is accessed and used. The delivery of a more seamless transport network for the region will make travelling by public transport and active travel more attractive for a wider range of journeys and reduce the high levels of car dependency with 64% of journeys to work by residents of the region being made by car drivers or passengers in 2019. This seamless transport network will be aided through an integrated ticketing scheme incorporating fare capping and measures to reduce two fare trips or a more targeted initiative. To be truly effective these schemes need to operate across different operators and modes.

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2 Action - Develop a MaaS scheme for the SEStran region: The GO SEStran Project

Mobility as a Service (MaaS) envisages users buying transport services (including public transport, car usage, access to active travel, taxi, demand responsive transport, etc.) as packages based on their needs instead of buying the means of transport itself or in a series of distinct packages. It is being driven by digital innovation which presents the opportunity to combine transport provision through a single platform. The implementation of MaaS within the region presents an opportunity to create a seamlessly integrated sustainable travel system that meets the needs of users as effectively and efficiently as possible. However, given the uncertainty at this time around the ways that MaaS will develop there is a need for the public sector and bodies like MaaS Scotland to guide and shape MaaS provision to ensure its successful delivery by supporting a broad, collaborative and multi-modal approach.

Any MaaS scheme in the SEStran region would need to be capable of meeting the differing needs of both urban and rural areas which must be considered when planning the ecosystem. The geographical scale at which a MaaS scheme operates also needs to be considered as artificial boundaries could be created which limits its effectiveness. On this basis, a regional scheme may be most effective. In urban areas, MaaS will predominantly provide a more comprehensive sustainable mobility package that provides an attractive alternative to the private car leading to a reduced need for ownership and usage.

In our rural areas, MaaS needs to ensure that people are provided with effective and affordable links to essential services particularly for those that do not own a car, or who would prefer not to use a car. Rural residents with lower levels of independence are likely to be the users who have the greatest potential to benefit from MaaS as shown in Figure .[2] Within this group, planned journeys, where the person knows in advance where they want to go, are likely to be those with the greatest opportunity to be delivered by new transport methods through MaaS. Here, users typically have more notice to consider their journey method ahead of time. They also have a greater degree of flexibility
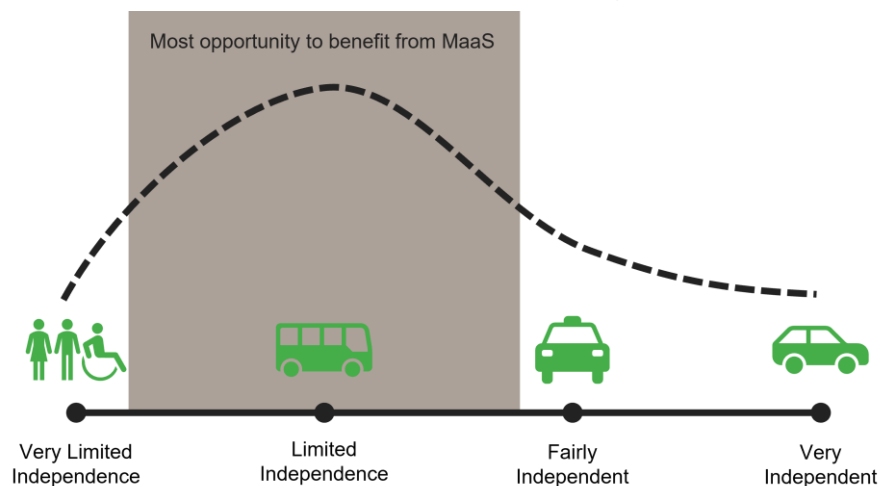
Figure 8: Rural Independence and Opportunity for MaaS

[2] Adapted from Transport Catapult: Ready for Innovation – The Opportunity for Innovation in Rural Transport

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over their journey compared to commuting or spontaneous trips. In rural areas, MaaS providers and transport operators should be seeking to increase convenience, decrease cost or ideally do both in order to help create a desirable proposition for passengers.

2.1　The Background

The first awareness that the MaaS concept could be considered in rural areas occurred in Finland at the first event of the PriMaaS project, namely through the participation of Kaisa Karhula on 28th January 2020.

Creating mobility services to rural areas - lessons learned from the ALPIO-project By Kaisa Karhula Passenger Transport Engineer, Tuomi Logistiikka

Throughout the project and due to the similarity of challenges common to the various regions, the topic of the link between rural areas and urban centers throughout integrates services has been deepened. For example, in the last interregional event, there were two specific session addressing this issue.

This action to develop a regional MaaS platform for the SEStran region is inspired by the Finnish good practice on the Finnish Act on Transportation Services, which has standardised transport data all across Finland. This is a key policy initiative which has helped promote MaaS in Finland as per the Whim case study.

SEStran also be building on the experiences of the AMT Azienda Mobilita e trasporti SpA (Liguria) and the good practice they submitted on the AMT mobile application that aims to provide public transport customers an innovative and efficient tool for improving and simplifying their journey experience. In particular, SEStran will be focussing on the real time integration and smart ticketing integration into the online application.

SEStran's policy instrument, the Regional Transport Strategy, now recognises the potential of MaaS as a concept to help achieve strategic transport objectives in the South East of Scotland:

Case Study: Whim, Helsinki

In Helsinki, MaaS Global is the first commercial start-up to develop a MaaS subscription service. This was created in October 2016 through the launch of its Whim app. It offers several levels of service, ranging from a pay-as-you-go option to an unlimited use package which includes public transport, taxis, bike and car-sharing.

Whim was enabled by **Finnish Ministry of Transportation legislation**, which itself was informed by the deregulation of their telecoms market, making it mandatory for public transportation to allow access to their Application Programming Interfaces (APIs) and ticketing systems on vendor platforms. Phase one of the legislation came into effect in January 2018, with phase two implemented in January 2019.

Whim now has 13,000 active users per month in Helsinki and has expanded its service to several other European cities, including Antwerp and Birmingham. Within Helsinki, Whim currently has less than 1.5% of the total mobility market but aims to shift the market from ownership to usership, with its unlimited package costing less than car ownership.
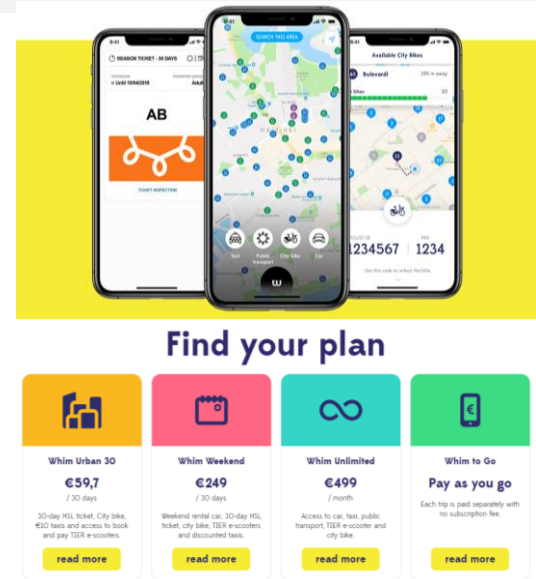
SEStran aspires to create and contribute to an environment for both MaaS and DRT where data is widely available and shared. This is done not just to have parity with other MaaS Programmes (e.g. Switzerland Mobility data platform[3] and UK Bus Open Data Service[4]), but to enable a wider innovation ecosystem that can use data sources to improve the service and outcomes of all.

Furthermore, we plan to be more innovative than just exposing Open Data (data which is available to all and free to use for any purpose). We also expect to build a solution that allows true MaaS ecosystem interoperability, by allowing the solution to share smart data (data which is owned by a customer and then shared with their permission) held within a customer's account via Open Standard Application Programming Interfaces (APIs). This will not only ensure compliance with future expected UK Government legislation, but also prevent vendor lock-in and enable our solution to easily integrate to other MaaS Platforms, Transport Providers and value-added services as needs arise.

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[3] Open Transport Data. (2021). Open data platform mobility Switzerland. Available at: https://opentransportdata.swiss/en/
[4] UK Government. (2020). Bus Open Data Service. Available at: https://www.gov.uk/government/collections/bus-open-data-service

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2.2   Action

SEStran secured funding for the implementation of a MaaS platform in the South East of Scotland for the GO SEStran project, funded through the Transport Scotland MaaS Investment Fund. By setting up a regional MaaS platform, SEStran aims to support local authorities and transport operators to provide a more efficient and sustainable transport network and make alternatives to the private car easier to access.

The SEStran Regional Transport Strategy includes a policy to explore ways to implement and trial MaaS application in the SEStran region. This action will be a full expression of this policy put into practice. Funding for the project will be partly through funding set aside by SEStran for the implementation of its RTS and partly through MIF2.

The GO SEStran project is led by SEStran, the statutory Regional Transport Partnership for the South East of Scotland, encompassing eight local authorities: City of Edinburgh, Clackmannanshire, East Lothian, Falkirk, Fife, Midlothian, Scottish Borders and West Lothian. The region has a population of over 1.6 million[5] people. SEStran's vision is for:

> *"A regional transport system that provides all citizens of South East Scotland with a genuine choice of transport which fulfils their needs and provides travel opportunities for work and leisure on a sustainable basis."*

Part of SEStran's role is to address the vast range of transport issues that can be found across the region by contributing to a range of projects and events that help to implement its Regional Transport Strategy. SEStran sees MaaS as a key piece of the puzzle in the future mobility system beyond the private car within the region. By setting up a regional MaaS platform SEStran hopes to support local authorities and transport operators to provide a more efficient and sustainable transport network and remove barriers to accessing services for citizens across the region and beyond.

A MaaS app will make it quicker and more convenient for the population to plan, book and pay for alternatives to the private car, whether that be bus, train, taxi, conventional or e-bike hire, car club, car sharing or any of the other emerging alternative forms of transport.

2.2.1   The Proposed Solution: Integrating the bricks and the bytes

To address these challenges, our core one-year project delivers a **multi-modal Mobility as a Service (MaaS) plug-and-play platform** that will be piloted initially in East Lothian and the urban area of Musselburgh and its surroundings. The MaaS platform will focus on digitally

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[5] Statistica. (2021). *Scottish regional population estimates*. Available at: https://www.statista.com/statistics/865968/scottish-regional-population-estimates/

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enabling the integration of multiple modes at Brunton Hall **Journey Hub** (also known as *Mobility Hubs*) as well as integrating a new **Demand Responsive Transport** (DRT) route that will connect people in Pencaitland and its surrounding hinterlands with Tranent and Wallyford Park & Ride.

Figure 9 shows a graphic representation of the GO SEStran project including the locations of the core MaaS element and DRT pilot area.
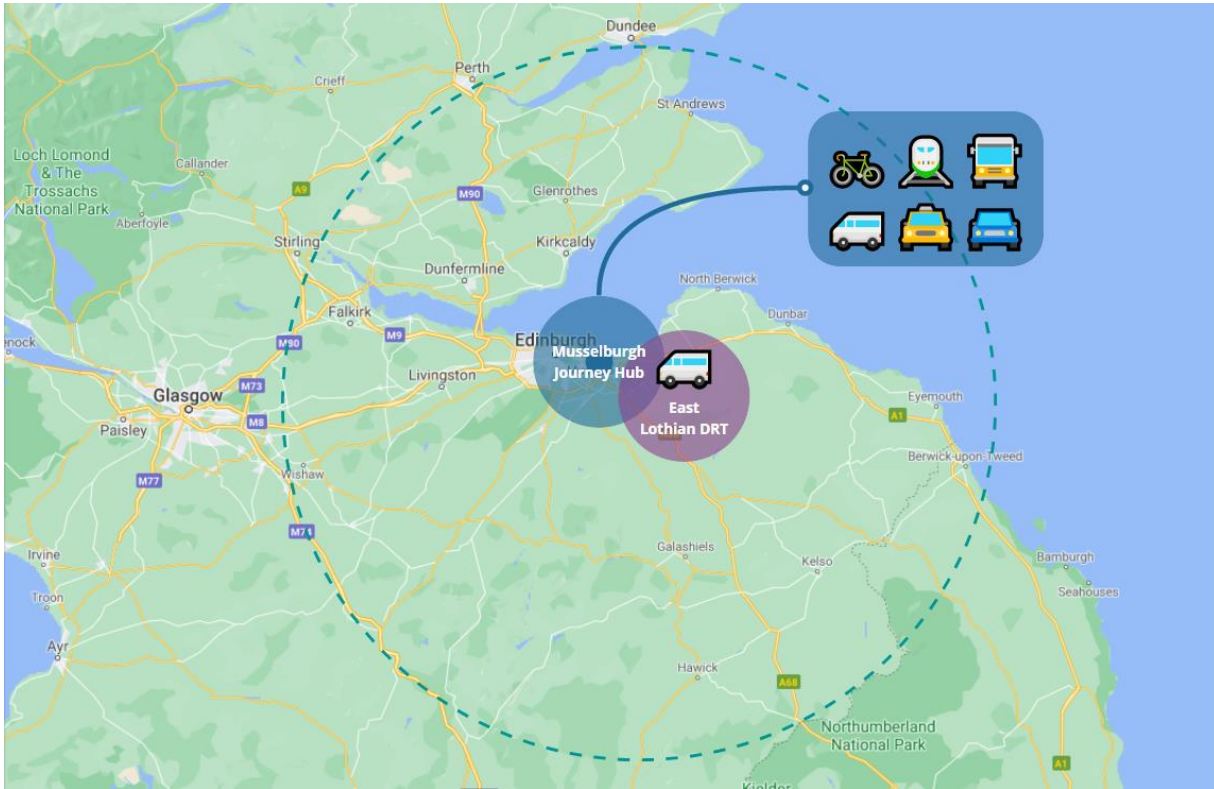
Figure 3: Overview of the GO SEStran MIF2 project

Addressing these challenges at a regional level will enable the approach taken to become an exemplar for other regions across Scotland. Enabling the entire region as well as the rest of Scotland to learn from the GO SEStran MIF2 project is crucial to the success of the project and to solving shared challenges. This is why the project will establish an Open Learning Network which will involve a wide range of stakeholders interested in learning from the outcomes of the project.

2.2.2 Developing the Solution

The MaaS solution will build on the Tactran ENABLE MaaS solution funded by Round One of the MaaS Investment Fund (MIF). This approach of two RTPs collaborating not only produces significant savings but also offers greater future potential with regard to scalability and interoperability.

The core MaaS system to be produced by this means will consist of:

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- iOS and android app (no website)

- Powered by the Fuse MaaS platform

- Everything from the ENABLE National Park Journey Planner

  - Plan and price for: walking, cycling, bus, train and taxi (in East Lothian)

  - Carbon calculator

  - Book and pay for: train (UK) and taxi (Karhoo coverage)

- Initial app and system setup

However, the project as proposed will also include:

- National Rail Enquiries real time feed

- Journeo API[6]

- Accepted payments on bus

In terms of Journey Hubs and Park and Ride, the project will also allow for:

- Co-wheels API, UI and pass out to app

- Enterprise API, UI and pass out to app

- Bewegen API, UI and pass out to app

- Chargeplace Scotland/SWARCO API and UI

- Intermodal (one-way, planning only) drive to public transport at park&ride/train station with parking

- Incorporation of above into ENABLE services

Initially, the MaaS platform will focus development and marketing towards higher education and healthcare trips to improve the customer journeys of these user types before widening reach to other journeys.

2.2.3 The MaaS Pilot: Brunton Hall Mulit-Modal Journey Hub (Musselburgh)

The solution will be applied to our core pilot which centres on a new Journey Hub concept in Musselburgh, East Lothian. Musselburgh forms an important connector between East Lothian and the City of Edinburgh, a crucial destination for employment, education, healthcare and retail. Musselburgh is also an urban hub for its surrounding hinterlands of East Lothian, which

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[6] Subject to confirmation of licence status

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is home to approximately 105,000 people and is projected to have the 2nd highest percentage change in population across East Lothian between 2018 and 2028 at 7.2%, largely due to net migration.[7] Within East Lothian, Musselburgh is the largest urban area with a population of over 20,000. The majority of East Lothian's population, 61.4% (over 64,000 people), lives in Musselburgh and its surrounding wards.[8]
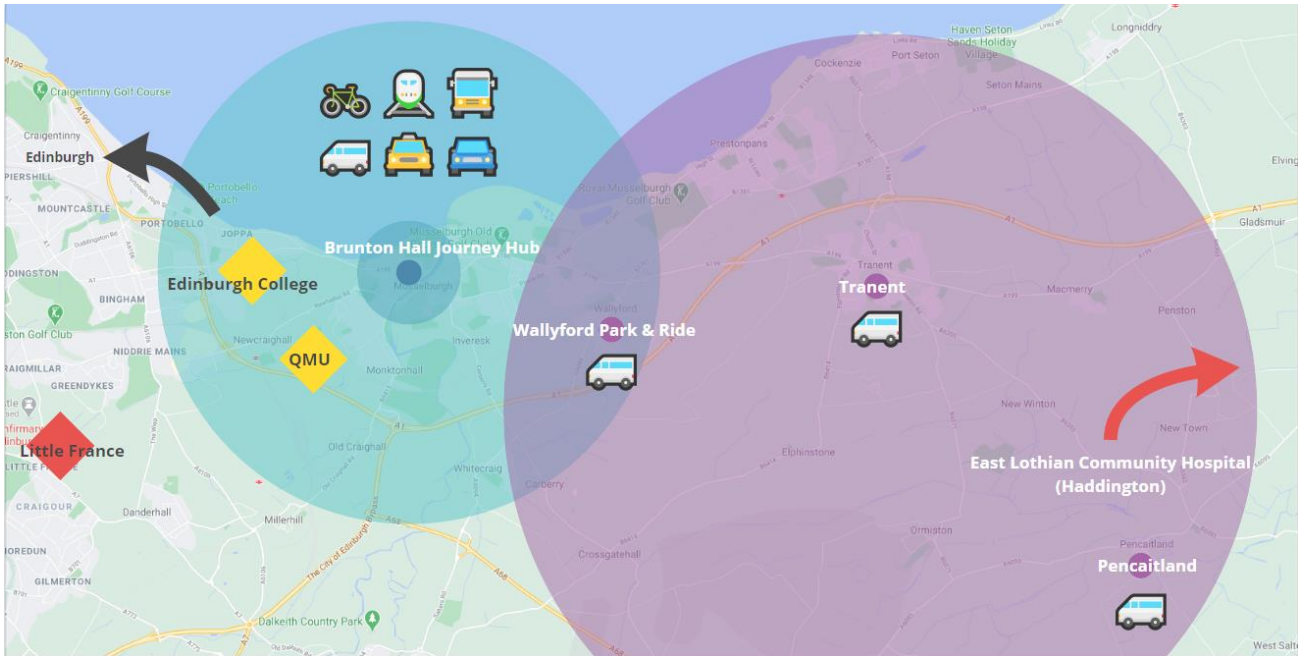
Figure 40: East Lothian MaaS and DRT pilot

Musselburgh and its surrounding area is the natural and most logical choice for our core MaaS and DRT pilot, several strategic reasons for selecting this pilot location are listed below:

East Lothian has made significant progress in pushing forward the Journey Hub concept which forms a core innovative aspect of our project. The first of their Journey Hubs at Brunton Hall in Musselburgh is on track to become operational in April 2021. The MIF2 project provides an opportunity to accelerate the development of this and other Hubs planned across East Lothian (i.e. at Wallyford Park & Ride, Pencaitland, Tranent and Prestonpans which DRT may connect people to during the MIF2 project).

SEStran is able to build upon the existing interest and momentum from a range of stakeholders within the East Lothian area to support the pilot, including the Local Authority, local operators, tech providers who live locally to the area and have existing relationships, and community groups. This presents a strong base to develop and deliver a pilot.

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[7] National Records of Scotland. (2019). *East Lothian Council Area Profile*. Available at: https://www.nrscotland.gov.uk/files/statistics/council-area-data-sheets/east-lothian-council-profile.html#:~:text=Mid%2D2018%20Population%20Estimates%20by,of%20Scotland%20increased%20by%200.2%25.

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There are plans to roll the Journey Hub concept out across the region, presenting a scalable model for replicating the successes of the pilot including learning from and adapting based on any lessons learned.

The scale of Musselburgh enables significant lessons to be learned from focusing on it as an urban MaaS pilot. With population of ~20,000, there are many lessons to learn for the other ~40 Scottish towns that are between 15,000-50,000 in terms of population.

There are a range of modes already existing in Musselburgh, as well as new modes that will come online during the year long project. These existing and new modes will be physically integrated at the Brunton Hall Journey Hub.

Using the MaaS solution to present information and enable planning, booking and payment of the multiple modes available at the Journey Hub provides prospective users with a hook into using the MaaS solution and ultimately provides a compelling alternative to car ownership. This will enable the solution to gain awareness and users, particularly among our target users, as the Journey Hub and other DRT interchange points present a natural gateway to higher education and healthcare facilities.

2.2.4 Tech-enabled Demand Responsive Transport in East Lothian

The greatest opportunity for MaaS in rural areas lies in the field of **Demand Responsive Transit (DRT)** as illustrated in Figure . Whilst DRT is not a new concept and is already widely operating across rural areas in the region, there are opportunities to deliver DRT services to a wider user base at a lower cost to users. The opportunity for transport suppliers is to make more use of existing spare capacity on their services. This capacity comes in the form of spare seats, empty running and vehicle downtime. Innovation can help to tackle these inefficiencies by increasing viability of services, making booking services easier and smarter routing. The benefit to customers would be optimised services providing better accessibility and meeting their needs more effectively. DRT could play a much wider role than it does currently, by harnessing emerging app-based systems and booking and scheduling technology ('enhanced' DRT); by partnership and integration between existing DRT operators and the wider public transport network; and being viewed as a realistic alternative to
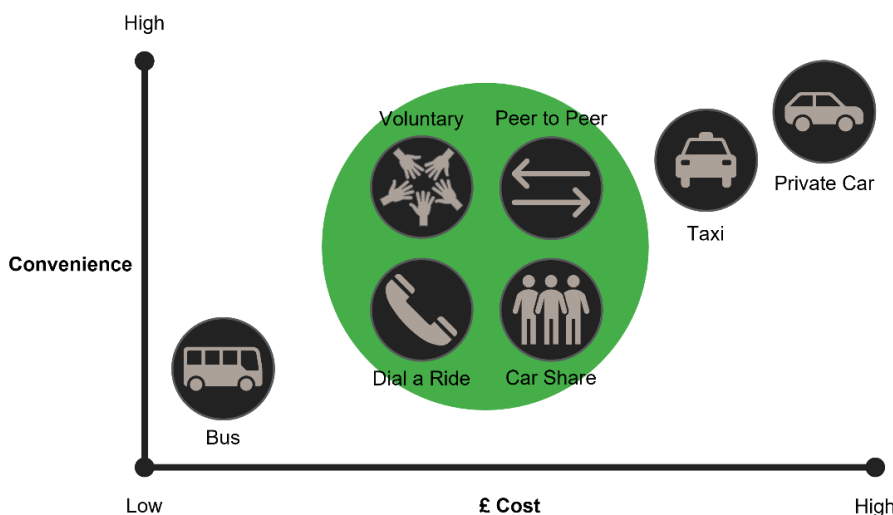

Figure 11: Convenience v Cost of Rural Transport Modes

expensive fixed-route bus services. To achieve this, it will require changes in funding priorities, as well as greater support for the community transport providers who face particular challenges of finance and human resources.

The Scottish public transport network related challenges that SEStran has directly experienced and that we aim to address with our MaaS and DRT solution centre focus on two core themes:

- The lack of physical and digital integration of transport across the region

- Transport poverty across the region

SEStran will therefore be building on the experiences of the Intermunicipal Community of Coimbra (PP2) and their experience implementing a demand-responsive transport solution in 18 municipalities of the Coimbra Region. SEStran will be using the information and lessons learned provided on the SIT FLEXI Intermunicipal Demand Responsive Transport Solution good practice submitted by Coimbra region.

This good practice showed the potential of DRT to provide effective transport solutions, particularly in rural areas where public transport cannot effectively and efficiently cover 100% of the area. SEStran is experiencing similar issues in East Lothian, and has therefore developed this action to trial DRT in partnership with the local bus operator in an attempt to increase coverage of the network and increase patronage. The SIT FLEXI good practice showed the benefit in two rural municipalities following a pilot project, and is now being expanded to remaining municipalities. The DRT solution proposed in East Lothian, builds on the same principles of providing greater flexibility in rural services, to better meet passenger demands.

The tech-enabled DRT pilot in East Lothian seeks to connect people in underserved areas with the public transport network, particularly focused around higher education and healthcare destinations. This is particularly important from an inclusivity and accessibility perspective, as people who live in areas facing transport poverty and do not have access to a car often don't have straightforward access to healthcare, higher education, and other key services. This is exacerbated in many of the vast rural areas across the region.

SEStran is working with Prentice Coaches and East Lothian Council who have implemented a DRT element by amending the existing 109 service, which runs from Humbie to Haddington. Initial discussions with Prentice and another potential tech partner fell through. However, Prentice have now partnered with another DRT tech provider.

A typical timetable prior to the change is set out below:

109 Humbie & Elphinstone to Haddington

110 Journeys between Pencaitland and Blindwells are shown for reference

	Monday to Friday				
Service	110	109	109	109	109
Haddington - High Street	0700				
Humbie	-	0900	-	1200	-
East Saltoun	-	0908	-	1208	-
Pencaitland - Crossroads	0712	0912	-	1212	-
New Winton	0715	0915	-	1215	-
Elphinstone Research Centre	0718	0918	-	1218	-
Elphinstone - Duries Park	0722	0922	1032	1222	1332
Caponhall Road End	0725	0925	1035	1225	1335
Loch Centre	0727	0927	1037	1227	1337
Tranent - Police Station	0729	0929	1039	1229	1339
Church Street (A1 Roundabout)	0731	0931	1041	1231	1341
Blindwells	0733	0933	1043	1233	1343
Longniddry - Village	-	0937	1047	1237	1347
Gladsmuir	-	0940	1050	1240	1350
EL Community Hospital	-	0946	1056	1246	1356
Haddington - Market Street	-	0950	1100	1250	1400

Operates as Service 109
Operates as Service 110

1722   Journey changes from 109 to 110 at Elphinstone

Figure 52: 109 service timetable

A map of the new DRT Inner and Outer Area routes and timetables are shown below, Figure 63 and Figure :

Figure 63: New DRT Inner and Outer Areas routes (source: http://www.prentice.info/DRT1.html)

DRT1 Connecting With **109** **Tranent to Haddington**

	Monday to Friday		
DRT outer Area -pick up from	0850	1045	1305
Humbie	B	B	B
East Saltoun, West Saltoun	B	B	B
Glenkinchie	B	B	B
DRT inner area - pick up from	0905	1100	1315
Pencaitland, Ormiston	B	B	B
New Winton	B	B	B
Elphinstone, Research Centre	B	B	B
Area covered by DRT until	0923	1113	1333
B - Journey must be booked in advance			
Connection with Service 109	0923	1113	1333
Tranent - Caponhall Road End	0923	1113	1333
Tranent - Police Station	0927	1117	1337
Blindwells	0931	1121	1341
Longniddry - Village	0935	1125	1345
EL Community Hospital	0944	1134	1354
Haddington - Market Street	0948	1138	1358

109 **Haddington to Tranent** – Connecting With **DRT1**

	Monday to Friday			
Haddington - High Street	0958	1218	1408	1603
EL Community Hospital	1002	1222	1412	1607
Longniddry - Village	1011	1231	1421	1616
Blindwells	1015	1235	1425	1620
Tranent - Opposite Police Station	1019	1239	1429	1624
Caponhall Road End	1022	1242	1432	1627
Tranent - Opposite Police Station	1026	1246	-	-
Service 109 connects with DRT1	1026	1246	1432	1627
B - Journey must be booked in advance				
DRT inner area - drop off from	1026	1246	1432	1627
Elphinstone, Research Centre	B	B	B	B
New Winton	B	B	B	B
Ormiston, Pencaitland	B	B	B	B
DRT outer Area -drop off from	1040	1300	1445	1640
Glenkinchie	B	B	B	B
East Saltoun, West Saltoun	B	B	B	B
Humbie	B	B	B	B
Area covered by DRT until	1045	1305	1455	1650

Figure 14: New DRT Timetables (source: http://www.prentice.info/DRT1.html)

The part of the route from Humbie to Tranent is particularly rural in character. Accordingly the bus operator, in consultation with East Lothian, have created a DRT zone for this part of the route, allowing on demand pick up of passengers instead of a fixed-line route. This will

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increase public transport coverage in the area and allow buses to respond to demand to carry a greater number of passengers.

Initially the on-demand booking will be carried out either by phone or via the bus operator's website, where an online form will be filled in setting out the passenger's requirements for travel. This will in the coming weeks be supplemented by an app. The DRT tech operator's system is already being used to assist online and phone bookings but will also drive the app.

During first three months of the trial, East Lothian Council and Prentice will review the data and carry out analysis to establish whether the service should be modified. This investment by the bus operator in technology will help by supplying reliable, meaningful data.

In terms of integration into the MaaS system, the revised budget allows for the following integrations:

- DRT routes, availability, prices and pass out

- Intermodal (one-way and plan only) for DRT to onward public transport

It may be possible to also integrate booking/payment within the Go SEStran app. However, further work is needed to establish this.

2.3   Players Involved

SEStran is working with partners to deliver the MaaS application, including MaaS software providers, local authority partners, Transport Scotland and operators.

To ensure SEStran and technical partners adopt the appropriate interoperable standards for both Open and Smart data sharing, SEStran will be working with various experts, such as the Open Data Initiative and MaaS Scotland, to promote data standards in the implementation of the GO SEStran MaaS and DRT pilot projects.

The table below sets out the various roles and responsibilities of partners involved in the implementation of this action:

Table 1: GO SEStran Partners Roles

Organisation	Role	Actions	Timescale
Transport Scotland	Project funder and overall project governance	Provide oversite of project content compared to original funding submission.	April 2022 – Dec 2022
SEStran	Overall Project Manager	• Develop brief and specification for project services. • Procure and accept project • Project management • Supported by consultants appointed through the project	April 2022 – Dec 2022

East Lothian Council	Transport Authority delivering supported bus service	• To support and promote the MaaS platform in East Lothian	April 2022 – Dec 2022
Fuse	Tech provider	• To deliver the technical platform to be used for delivering MaaS services • To build further integrations with transport providers	April 2022 – Dec 2022
Tactran	Regional Transport Partnership involved in MaaS a current platform trial.	• To be involved as stakeholder in the adaption of the National Park Journey Planner app for the SEStran region	April 2022 – Dec 2022
Prentice Buses	Bus Operator	• To provide main bus service that will enable DRT to be trialled through the MaaS platform	April 2022 – Dec 2022
DRT tech provider	DRT software	• To provide DRT software to enable bus operator to operate 109 service (partly) flexibly	April 2022 – Dec 2022

2.4 Timeframe, Costs and Funding Sources

The platform will be piloted for a minimum of 6 months. It is funded by SEStran and through the Transport Scotland MaaS Investment Fund and was awarded £220,000. SEStran are providing match funding of £225,000.

Table 2: The GO SEStran Project - pipeline

Phase	Delivery	Modes integrated	Location focus
Phase 1 – Funded by MIF2 for year 1 **April 2022 – July 2022**	Adoption of Enable MaaS platform DRT service launched	Bus Train Taxi Walk Cycle DRT lite Car Club Lite	MaaS integration focused on Brunton Hall Journey Hub DRT provides connections to Wallyford Park & Ride, Pencaitland and Tranent interchange points

Phase 2 – Funded by MIF2 for year 1 July 2022 – December 2022	MaaS + DRT light integration RTPI/bus payment methods/community transport integration Journey Hub/P&R integration	Deep DRT Cycle hire P&R multimodal onwards travel	
	Identifying and securing future funding for upscaling MaaS and DRT	Expanding MaaS to cover modes primarily in the urban areas geographically adjacent to the pilot(s)	Integration of region-wide DRT services

The solution will harness the Fuse Mobility MaaS Platform (see Figure 15) which has evolved to provide a scalable platform layer integrating transport operators as well as third party data sources (e.g., the public transport route planner service Traveline, Urban Traffic Management and Control (UTMC) systems). This platform lies at the heart of delivering a plan-book-pay mobility service layer, with each service having its own governance arrangements to ensure it meets business case objectives. Crucially, this allows rapid delivery in order to meet MIF2 timelines.
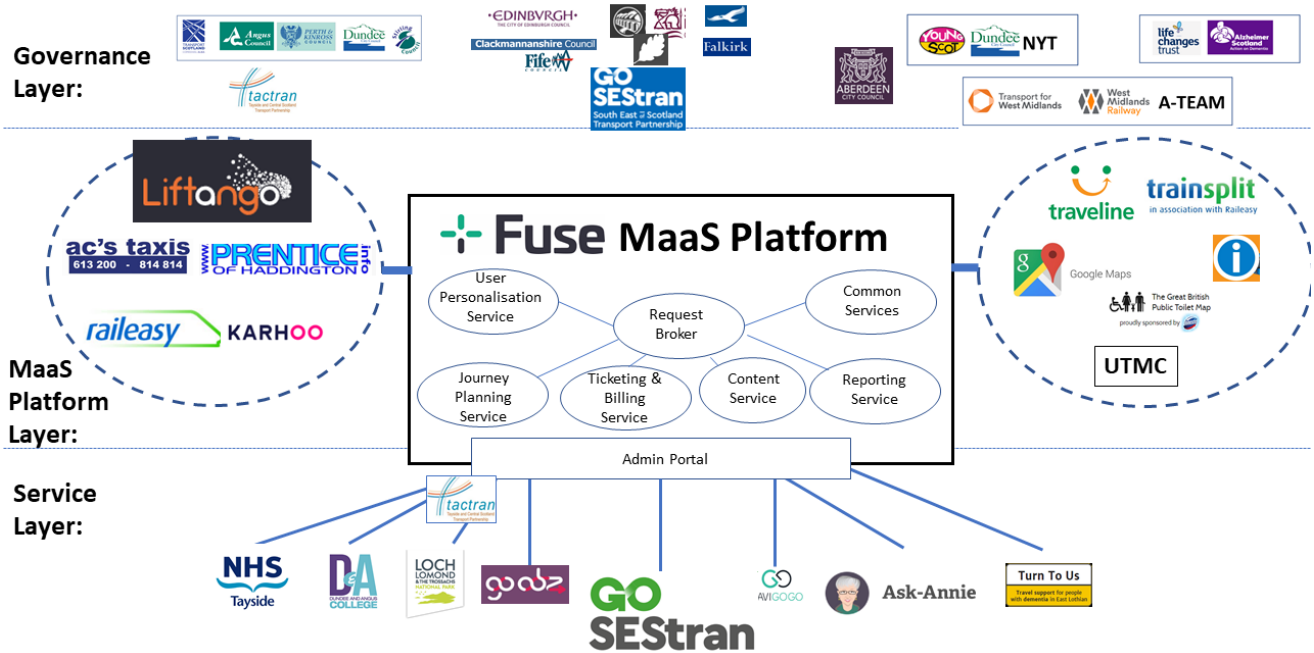

Figure 15: MaaS Platform Architecture

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In terms of the integration of multiple modes, this will focus on the Brunton Hall Journey Hub which presents an exciting array of modes to integrate into the platform. An overview of these modes and their existing and proposed integration is shown in Table 3 below:

Table 3: East Lothian Journey Hub multi-modal integration (X- done, P - pipeline)

Mode	Plan	Book	Pay	SEStran transport providers	Notes
Rail	x	x	x	All rail stations in the UK	
Bus	x		P	East Coast Buses, Prentice, Eves Coaches, Lothian Buses, (MOST) Stagecoach East Scotland,	Includes bus prices/concessionary pass acceptance for these providers. Some Stagecoach East Scotland bus service prices are not available
Taxi	x	x	x	To include price estimate, we just need to add the East Lothian private hire fare table info into the system.	Book and pay functionality is on a per taxi operator basis - those taxi operators with automated dispatch systems may already be supported by our ability to integrate the Karhoo SDK
DRT	x	x		DRT service	Integration with Trapeze PASS system in Stirling region
CT	x			To add the participating SEStran Community Transport providers information into the system	
Micro mobility hire	x			Bewegen Bikes	Nextbike locations and price estimates have been integrated in Stirling. Ride on bikes in Dundee are in development
Car club	x	P			

2.5 Risk Analysis

Key risks and mitigations in delivering the GO SEStran MaaS Platform are shown in Table 4. As MaaS is an innovative transport concept, its implementation comes with a degree of uncertainty, such as essential stakeholder cooperation and future service demand. Throughout the project SEStran are undertaking risk monitoring and control: identifying new risks and planning for them and tracking existing risks to:

- asses if they are still relevant

- asses if risk conditions have been triggered

- monitoring if existing risks could become more serious

- tackle the remaining risks that require a longer-term, planned, and managed approach.

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Table 4: GO SEStran risks and mitigation

Area of Work	Threat	Consequences	Impact	Likelihood	Risk Control Measures / Actions to Mitigate	Owner	Action / Timeline
Scope of work	Misinterpretation of project scope	Misinterpretation of the project scope could lead to mismatched expectations between SEStran and MaaS and DRT providers	M	L	SEStran to confirm scope and expectations of deliverables MaaS and DRT providers with input from key partners at bid stage and at project inception	SEStran	Definition of scope to be agreed within MIF2 bid and at inception meeting
Scope of work	Format of deliverables undetermined	If the format of the deliverables are not clearly defined from the outset this could result in deliverables that fall short of SEStran expectations, causing project progress to suffer	L	L	Define and agree the nature of deliverables during the bid and inception phases with input from key partners, in particular the MaaS and DRT providers. Ensure that deliverables are in line with any Transport Scotland and SEStran guidance.	SEStran	Format of deliverables to be agreed at inception with confirmation from SEStran of acceptability
Programme	Unrealistic project schedule	Unrealistic programme of works leading to project delays, increased costs and failure to submit funding bid	H	M	Agree programme of works with MaaS and DRT providers to define key project milestones to achieve final submission date. Early engagement with key stakeholders and third parties to minimise/avoid delay to third party inputs	SEStran	Programme of works to be reviewed at bid and inception meeting phases and milestones agreed. SEStran to engage early with key stakeholders and third parties
Programme	Delayed information provided to SEStran or project partners	Delayed information provided to SEStran (by MaaS and DRT providers) or to the MaaS and DRT providers (from the transport operators) may	H	M	Agree and clearly define information to be provided to SEStran/MaaS and DRT providers during inception/kick-off. Agree timescales for	SEStran	Information required and timescales for delivery to be agreed at bid and inception. All parties to meet agreed timescales

		result in SEStran being unable to achieve project milestones and final bid submission	H		delivery of key information to avoid delay		
Programme	Covid impacts on project commencement, progress and resourcing	Any core staff illness from SEStran or the MaaS and DRT providers may lead to hindered progress in relation to the project plan. Covid may also postpone the commencement of the project if it is deemed an inappropriate time due to lockdowns/ discouragement to travel, especially if this results in a requirement for social distancing.	H	H	SEStran and MaaS and DRT providers will ensure that adequate resources are provided in the event that a core team member falls ill. The project programme has been drafted without specific years/months in mind to account for the potential delay in commencement. SEStran and the MaaS and DRT providers will ensure the services is Covid-compliant, including reducing passenger capacity to allow for social distancing.	SEStran	SEStran to review project programme on commencement and amend it according to kick-off date.
Community Engagement	Lack of take-up of services - particularly by target groups	Communication/marketing of MaaS and DRT services may not appeal to target audiences and could result in lack of take-up by non-traditional MaaS and DRT users - which in the case of DRT might be younger people.	M	M	Prepare stakeholder engagement strategy in advance and implement to ensure adequate participation /representation during this phase of work	SEStran	SEStran to prepare engagement strategy for stakeholder engagement and communications and marketing plan to enable SEStran solution to appeal to target users

Programme	Transport services engagement	Delays to implementation could be caused by an unforeseen amount of negotiation required and/or contractual disputes regarding integration	H	L	Key transport operators engaged pre-bid and have provided letters of support. Preferred delivery team have existing relationships with most of the key transport operators and have integrated MaaS with them before. MaaS integration financial model does not top-slice operators' revenue	SEStran	Monitor via PM methodology with MaaS provider.
Funding	Sourcing ongoing funding for services beyond the pilot phase	A disruption in services for the communities if funding can not be secured to continue services beyond the pilot date	H	M	Data collected during pilots to create business case for ongoing funding	SEStran	Process of securing ongoing funding to commence before pilot end date to ensure continuation of services

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2.6   Outlook

The sustainability of region wide MaaS is a key challenge and opportunity for SEStran, who aspire to roll it out across the region in the coming years with a long-term vision in place so that…

> ***…by 2030, a region wide MaaS platform will provide an easy to use and attractive alternative to car ownership that has led to reduced transport poverty across the entire SEStran region.***

SEStran is working closely with other local authorities to monitor and evaluate the success of the DRT pilot in East Lothian, and identify funding opportunities to trial DRT in other parts of the SEStran region. If the East Lothian DRT pilot proves to be a success, SEStran will work with its partners to make the case for the expansion of the scheme into other parts of the region.

Our 5-year plan for developing a regional MaaS solution is visually represented in Figure 16. The carefully staged plan for developing the platform, raising awareness and use includes:
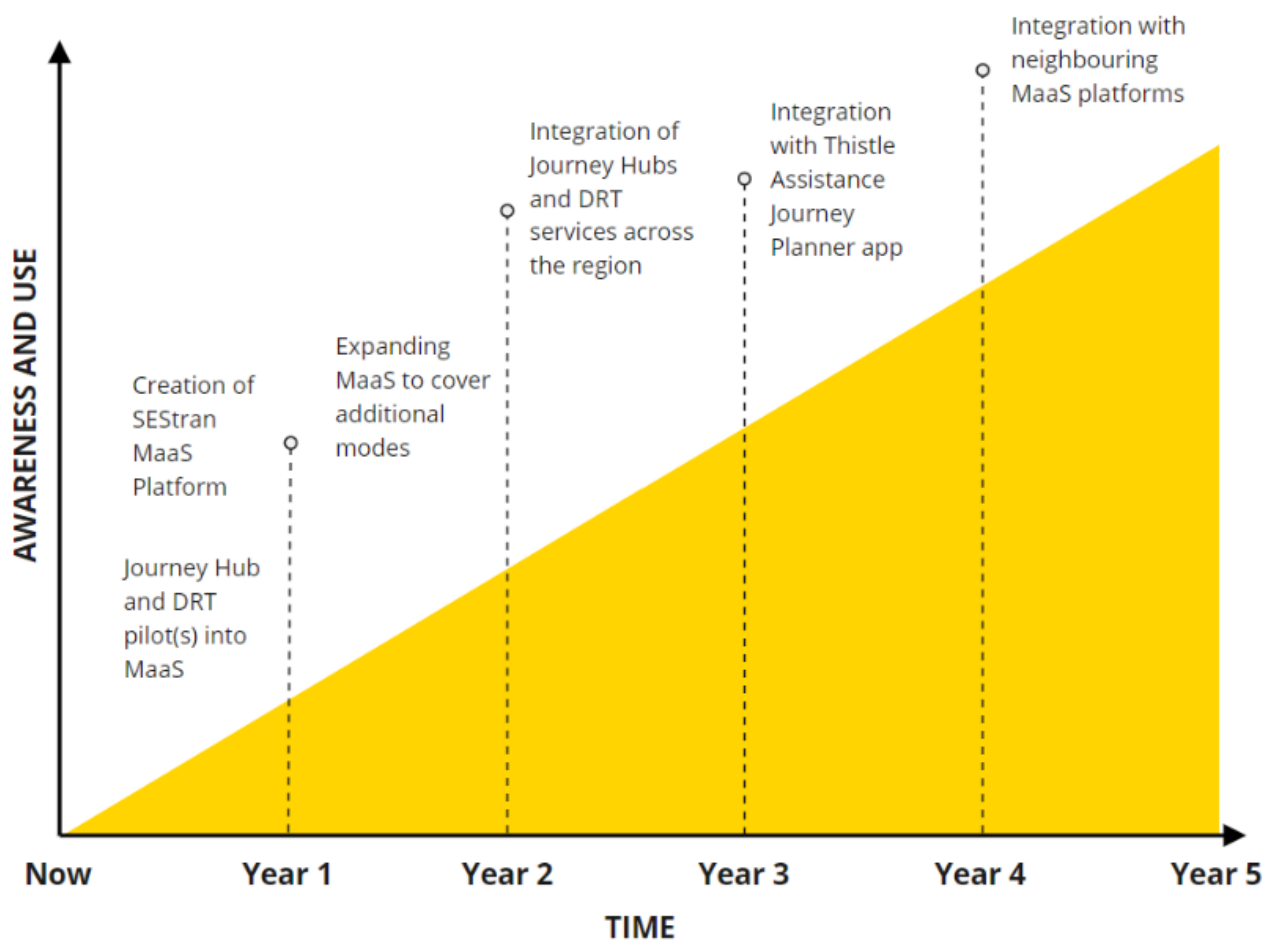

Figure 16: Long-term development of regional MaaS

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3 Communication Plan

SEStran will work to establish an Open Learning Network for the SEStran region, see Figure 17, and beyond. Within the first year this will primarily focus on enabling our demonstrators to become "leaders", with other urban and rural areas to become official (and unofficial) "followers". Learning will be shared from what the leaders have delivered within their pilots. Communication will be led and managed by SEStran via a series of informal "open space[9]" meetings using digital communication and collaboration tools (i.e. Microsoft Teams and Miro) where leaders and followers will be invited to both ask questions and share experience from what has been done, or what aspirations there are for others. Quarterly technical notes and dashboards (linked to the Monitoring and Evaluation Plan) will be provided to Open Learning Network members to share the lessons being learnt.

The Network will build on existing collaborative working that SEStran has developed with stakeholders in the region over many years. This includes, for example, SEStran's involvement in European funded projects (SHARE-North and PriMaaS), as well as the Thistle Assistance Journey Planner project.

Figure 17: SEStran Stakeholder Map

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4 Monitoring and Impact

Monitoring and evaluation will be integral to the assessment of the proposed actions. The aim of monitoring and evaluation activity is to draw on available evidence to understand whether delivery has achieved its expected outputs, outcomes and impacts – as well as identifying any challenges and successes – in order for future projects to understand key lessons. This is particularly key given this project's focus on an open learning network that will enable this demonstrator to be replicated in other locations across the SEStran region and beyond.

The monitoring and evaluation plan will identify if the following strategic challenges have been addressed by the project:

- **Digital Integration** – The development of a MaaS platform is key. Many national and international locations are seeking to develop similar transport solutions, so the development of the platform will be a key focus throughout the evaluation activity.

- **Physical Integration** - It is important that key challenges in relation to physical integration of transport are logged, with their impacts and mitigating actions recorded to ensure future projects can understand potential issues. Similarly, it is important that successes are logged, to ensure future projects can benefit from understanding how success is delivered.

- **Transport Poverty** – The following metrics will be tracked;

    o Whether shared mobility has increased e.g. bus, DRT, cycle hire

    o Whether single occupant vehicle (SOV) has decreased

    o The geographical location of users

    o User profiles e.g. age

- **Siloed nature of national, regional and local transport systems** – This challenge will be addressed through the set up of an Open Learning Network and progress evaluated and monitored through engagement in quarterly meetings, provision of quarterly dashboards to the members of the group and the creation of replicated opportunities across the region.

Table 5: Monitoring and Evaluation Plan

Outcome	Priorities	Data sources	Lessons learnt	Frequency of collection and reporting
Delivery of MaaS platform	Lessons learnt during development and delivery of MaaS platform	Programme manager and delivery team	Allows lessons to be learnt and shared across the SEStran region and beyond	Quarterly discussions feeding into quarterly report

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People of all characteristics and abilities are able to easily use MaaS and DRT solutions to access Journey Hubs	Diversity and number of users downloading and actively using the MaaS app	MaaS app (Fuse)	How many people are using the platform, for what purpose and socio-demographic characteristics of users	Monthly data feeding into monthly dashboard report
MaaS and DRT enables traditional public transport to gain patronage whilst DRT enables public transport to be more flexible and efficient. Journey Hubs provide an attractive alternative to car ownership and use	Number of users of the range of available modes	Bus operators, DRT operators, Cycle hire data	Findings will demonstrate the added value given by MaaS and DRT to the mobility system in East Lothian.	Monthly data feeding into monthly dashboard report
People are more likely to use public, shared and active modes, all of which create more physical movement than private car use	Survey of users to gain insight into positive and negative opinion of the project	MaaS user survey Wider online survey	Qualitative data to demonstrate what works well about the platform and changes to mobility habits	Quarterly surveys (following MaaS launch) feeding into quarterly report
Progress towards SEStran's 5-year delivery plan for MaaS	Open Learning Network	Number of meetings & webinars	Identification of replicable pilots for follower members to implement based on MIF2 demonstrators	Quarterly reporting

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5 FINAL NOTES

By participating the PriMaaS Project SEStran have benefitted greatly from information exchange and transnational collaboration. Through learning sessions and discussions with other partners facing similar challenges, PriMaaS has enabled sharing of MaaS expertise, experiences and solutions. This has had a positive impact on the development of the SEStran RTP and implementation of the GO SEStran project. Despite the disruption of Covid-19 effective collaboration and information exchange continued.

SEStran look forward to the second phase of the PriMaaS Project, implementing the Action Plan and monitoring the GO SEStran Project.

6 SIGNATURE OF THE ACTION PLAN

I hereby confirm that SEStran as a partner of the PriMaaS project with this Action Plan has defined priority actions target towards the improvement of policy planning and its instruments that are essential for the promotion and implementation of MaaS in th South East of Scotland.

Date: <u>26 April 2022</u>

Signature of representative: _____

Stamp of the organisation (if available)

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TOPIC
Low-carbon economy

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€1,563,660.00

from 1 Aug 2019 to 31 Jul 2023