



Partnering to deliver connected infrastructure

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How critical are partnerships between the public and private sectors in shaping the future of mobility?

How can industry players build the infrastructure and frameworks necessary to seize its inherent opportunities?

It begins with recognizing the critical role partnerships have in driving the future of mobility. That future is less about owning and managing a physical asset and more about linking public and private resources to create seamless, accessible, and multi-modal mobility experiences for both the transport of goods and everyday citizens.

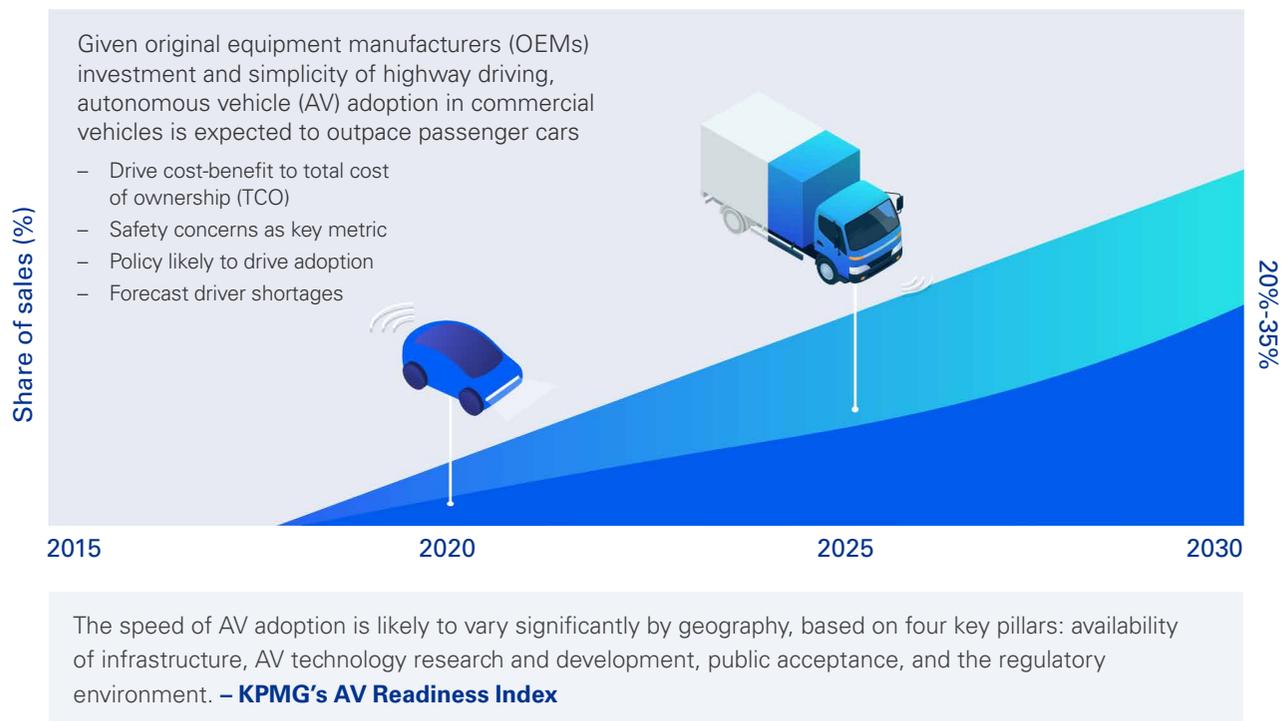
What do those partnerships look like in the world of Mobility 2030? It is about city planners using data from Mobility as a Service (MaaS) providers to build better municipal transit, governments pairing with private sector innovators to electrify their roads, and it is investors working with tech-savvy fintechs to seek synergies between physical assets and the mobility services being built around them. It is also about parking lots converging with fleet owners, gas stations becoming charging zones for electric cars, and urban areas supporting 'last kilometre' transit innovations like motorized scooters.

A number of recurring questions have emerged, including:

- **How will customers respond** to potentially radical changes to our daily lives and environments enabled by technology? What will their future behaviours be?
- **Where will value be created** across the future mobility ecosystem? How big will the 'value pools' be and how will they evolve?
- **What will the new ecosystem look like** and how will the various players' roles change? Who are the emerging customers for EVs, AVs and MaaS? What will these customers value?
- **What are the potential participation strategy options**, given existing asset bases and capabilities? Who are the key players across the value chain? Which organizations – or countries – are set to win?
- **What are the implications for financial, business and operating models?** How should financial ambitions change? Where and when should car companies, energy providers, etc. participate? How can they evolve to participate effectively?

In short, all mobility stakeholders must make peace with the fact that progress can no longer be made within public and private sector silos. The time is now to seek partnerships with government leaders, private sector trailblazers, vehicle providers, real estate owners, and everyone in between to approach mobility in new and collaborative ways.

Forecasting AV growth in new car and light commercial vehicles sales



A new working paradigm: Recasting roles

Collaboration in mobility can be a learning curve for some – especially public sector representatives who are now challenged to move beyond long-standing transit delivery models and connect with the private sector for help in reshaping infrastructure to accommodate the many promises of Mobility 2030. Herein, investors and private sector players have a role to play in bringing new ideas to the government's attention, guiding them through the innovation process and different technologies, and drawing from real-world examples across the globe to make their ideas heard. As these partnerships begin to form, investors will do well to learn how to work within the confines of the public sector, and the processes, regulations, and public scrutiny therein.

Got a question?

Learn more about KPMG's vision for Mobility 2030 by visiting home.kpmg/ca/Mobility2030 or contact [Lindsay Wright](#) and [Jamie Cameron](#).



On the public sector's side, partnering for Mobility 2030 requires a new approach to procurement and infrastructure management. That requires opening more paths for private sector innovators to deliver mobility services or offer assistance in building the 'smart' cities of tomorrow and being open to change. Additionally, it means helping private sector partners through labyrinthine government processes, and rethinking traditional procurement strategies to be more nimble, reactive, and accommodating to innovation.

Experimenting for greater good

We do not have to get it right the first time. With new mobility technologies, systems, and trends mounting from all directions, all partners need to make peace with experimentation and the fact that not every idea will work 100 percent of the time (if at all). That can be a difficult mindset for public stakeholders to adopt, but it is essential for overcoming the roadblocks along our collective journey.

When we refer to Mobility 2030, we envision a more connected, more reliable, and data-driven ecosystem – one that requires all players to work as one to see that vision through and keep the momentum going.

The big idea: To travel alone is to ignore the economic potential of Mobility 2030. This is why successful investors will be the ones who collaborate with private and public sector partners in ways they never have before to nurture a mobility system that leverages interconnected technologies to deliver a seamless multi-modal customer experience from the first kilometre to the last.

What is Mobility 2030? Mobility 2030 is our vision for the future of mobility. It is the convergence of new transportation technologies (e.g. electric and autonomous vehicles), 'smart' infrastructure, and on-demand transportation services. Mobility 2030 defines the new era of mobility that is reshaping roads and cities, driving massive societal changes, and inspiring cross-industry collaborations – all of which is giving rise to a multi-trillion dollar industry¹.

1. <https://assets.kpmg/content/dam/kpmg/xx/pdf/2019/02/mobility-2030-transforming-the-mobility-landscape.pdf>