



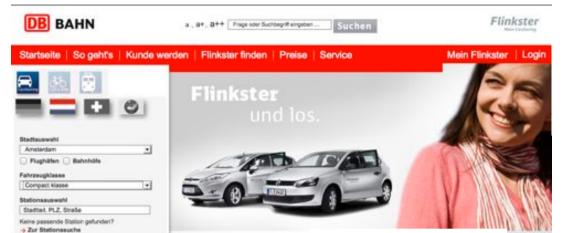
A few trends to keep in mind

- Growing role for the free market (≠ competitive tendering!)
 - Air, coach
 - Taxi
 - Rail
 - Local public transport (GB, [SE], ...?)
- Decreasing readiness to spend public money on public transport
 Less public money available with financial crisis

 - Traditional public transport looses its environmental advantage
 - Less captive elderly
- More intermediate forms of transport
 - Many have already appeared and are growing
 - Ćar sharingBike sharing
 - More to appear?
 - Made possible by telematics
 - Internet
 - Smartphone
 - GPS
 - Chipcard



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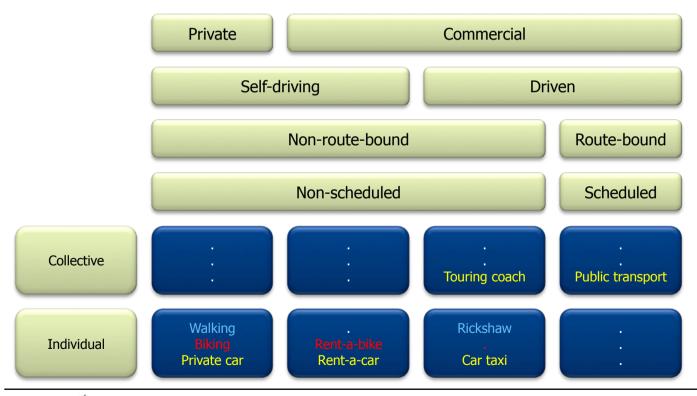






Just a few examples...

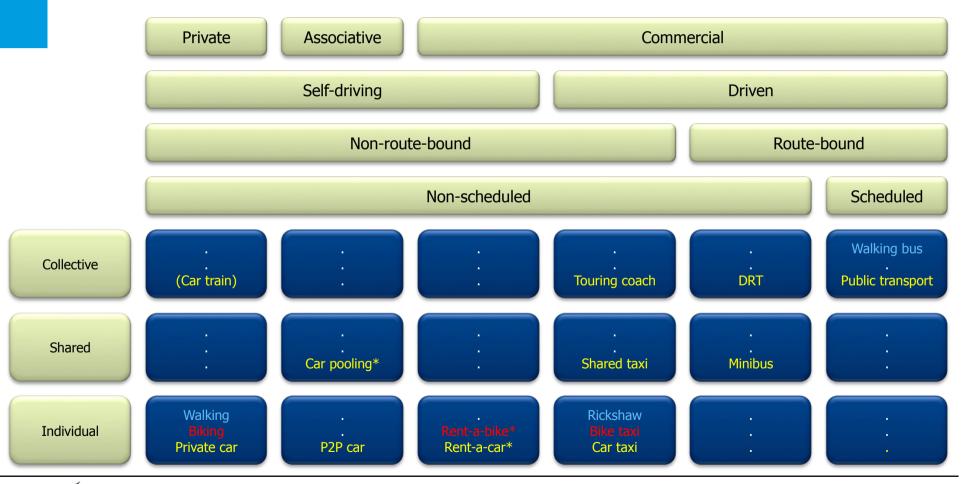
From a clear classification to a more fluid typology





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From a clear classification to a more fluid typology





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A few research questions

- Intermediate modes
 - What is the (potential) share of the intermediate modes?
 - Under which circumstances do complementary, intermediate modes grow best?
 - What are the real missed opportunities?
 - What are the regulatory barriers? What are the regulatory needs?
- More traditional question: What is good integration?
 - What are we talking about?
 - Information integration
 - Ticket and fare information
 - Network integration
 - Wider integration (intermodal, services, town planning,...)
 - How to induce the right level?
 - How to avoid preventing good integration?
 - How to avoid dogmatic excessive integration?



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What are the challenges and what role for regulation? Preliminary observations

- Conflicting logics
 - The exclusive contract-based authority-initiated approach
 - The market-based approach
- How to stimulate entrepreneurship / innovation?
 - Development period, investment needs
 - Versus (short) contractual focus and specified incentives
- Do we need a change of focus?
 - From clear sub-sectoral regulation, exclusivity and a steering authority
 Towards mixed regimes, flexibility and a facilitating authority
- This would require a fundamental challenge to the general approach
 From the authority as central planner?

 - To the authority as facilitator of new combinations?
 - Note: "facilitator" implies pro-activity, more positive than "regulator"
- In other words the challenge is
 - How to stimulate entrepreneurship, innovation, 'the unknown'
 - While generating synergies (i.e. avoiding destructive competition)
 'Synergies' is perhaps better than focussing on traditional 'integration'



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Who should be the problem owners in terms of policy-making, ownership and regulation?

- Legislative challenge
 - National level:
 - Problem owner for facilitating/imposing (watch out!) integrative approaches
 - European level: Reg 1370/2007

 - Based on traditional modal divisions (outdated)
 Mainly based on central planning/exclusivity paradigm
 - Approached for innovative market based combinations underdeveloped (hampering?)
- Governance challenge
 - National and regional/urban level
 - Metropolitan transport authority: Hierarchical approach (unicity) versus a more 'networked' approach?Limited by space given by legislation
- 'Arrangements' challenge
 - Urban transport authority/ies knowledge and city authorities
 - Beware of perverse entrépreneurial effects of concessions/exclusivity/ tendering! (Research need!)



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