DIGITALISATION AND REGULATORY CHALLENGES

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THE TRANSPORT SECTOR IS FULLY IMPACTED BY DIGITAL

- Customer expectations (information availability, distribution/ticketing, door-to-door mobility needs)
- Opportunities for RU : big data about customers, operational/business perspective (fraud prevention, near field communication,…)
- Industrial perspective : rolling stock, infrastructure and signalling

The opportunity of digital for mobilities

30% of internet requests

Are for transport and trips

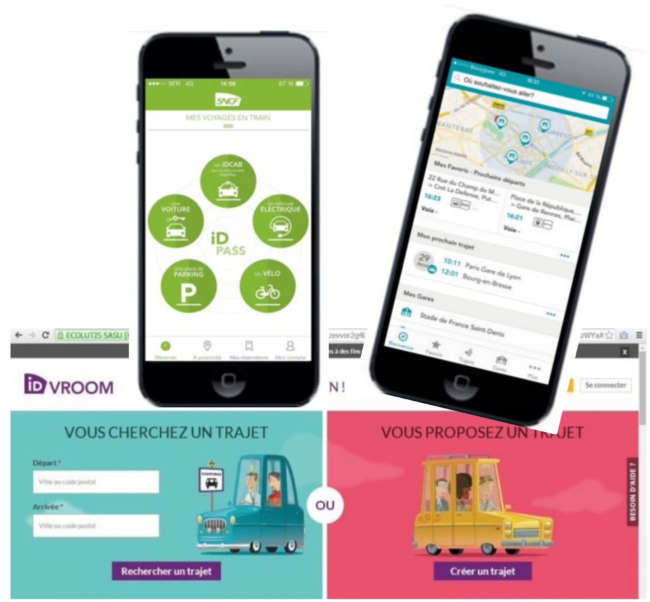
75% of the travellers

Use their smartphones before or during the travel

80% of the online buyers

Déclare they take care of the online opinions and 68 % trust the opinions, posted by other customers

Source : Nielsen Survey 2013



COMPARE PRICES ON INTERNET

1er action of French people when they buy a trip

Source : baromètre Raffour Interactif - 2014

A STRONG POLITICAL WILL AT BOTH EUROPEAN AND NATIONAL LEVELS

- A strong consensus on the need to integrate information and distribution of rail services :
  - "White Paper" (2011)
  - Market pillar of 4^{th} RP (debate on the mandatory nature)
  - EP Report "Koch" (2015) : integrated multimodal ticketing
  - "Digital single European Railway Area", EC Discussion Paper

- The French case : four different law projects under way create new rules for open data, making it difficult to design a long-term vision : extent of the scope, large principle of free data, public service

THE SPECIFIC ISSUE OF OPEN DATA

- Risk of disintermediation : at last distinguishing public services (PSO, public data in relation to public transport authorities) and open access services (train capacities and prices in real time)
- Real-time/disturbed situations : not possible to do without the RU know-how
- Freemium model is appropriate. If not, strong GAFA risk. They will never invest in rail infrastructure
- A “level playing field” between the different modes (long-distance bus services, car-sharing)

THE SPECIFIC ISSUE OF DISTRIBUTION

- PSO Authorities are responsible for distribution. For historic reasons, they invested in different ticketing systems
- For open access, demand requires 1/ door-to-door services,
  2/ multimodal comparison.
- Limited demand for cross-border ticketing interoperability except for local transport
- Sometimes, same standards for ticketing (Lille area and Wallonia).
  Cross-border common rate on a single ticketing support.
  But difficult to achieve.
- Best goal = interoperability. Different standards but same NFC support on one contact-less ticketing card because this technology does not evolve quickly

REGULATION, A BOTTOM-UP APPROACH IS NECESSARY

- Only physical distribution is directly in the scope of regulation : the website of the incumbent RU isn't an "essential facility".
- Shared responsibility between different levels (including regional and local) and different actors
- A top-down "one-size-fits-all" mobility solution is not the solution. Dynamic nature of the transport market (technology goes fast)
- Interoperability solutions on a voluntary basis : Full service model (FSM), Smart Ticketing Alliance (STA)
- Tasks for public authorities :
  - Create a favourable environment to the delivery of multimodal travel information, planning and ticketing services
  - Provide incentives to pilot projects, to develop and apply standards

THANK YOU FOR YOUR ATTENTION

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