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Multimodality – high on Europ. COM agenda



Two passenger multimodality studies:

- [Remaining challenges for EU-wide Integrated Ticketing and Payment Systems](#)
- Passenger rights in the multimodal context

Published 13 September

EP asked COM for actions on Multimodality

- European Parliament resolution of 7 July 2015 on delivering multimodal integrated ticketing in Europe;
- i.a.: calls on the Commission to ensure that any regulatory action keeps up with the rapid developments in the transport sector and does not create an unnecessary burden;

Multimodality

- Transport White Paper 2011
- Commission staff working doc. "Towards a roadmap for delivering eu-wide multimodal travel information, planning and ticketing services"

Data collection & data sharing

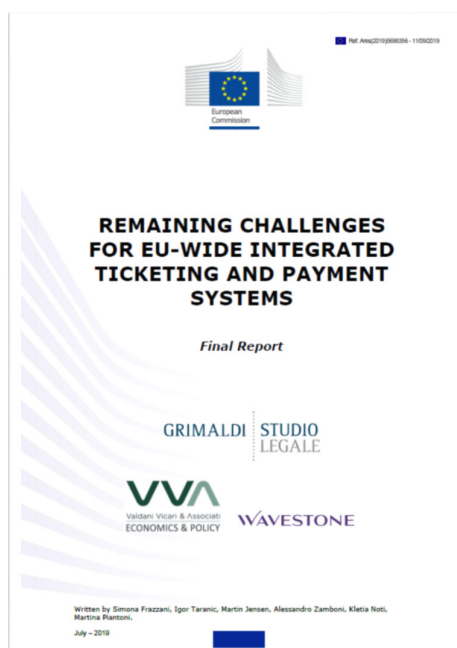
- ITS Directive (EU) 2010/40
 - Delegated Act: (EU) 2017/1926 Multimodal Travel Information Service
- PSO Obligations (EC) 1370/2007
- PSI Directive (EU) 2019/1024
- Free-flow of non-personal data (EU) 2018/1807
- National legal frameworks

In relation to information to the passenger:

- Mode-specific passenger rights
- Rail-specific: TAP TSI, PRM TSI

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Study on Remaining challenges for EU-wide Integrated Ticketing and Payment Systems



- Conducted for DG MOVE's Unit B4
- Methodology: stakeholder consultation, consolidation of (10) relevant projects, desk research, recommendations to tackle cross-border issues and progress with data collection & sharing
- CER and members have been approached

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Study on Remaining challenges for EU-wide Integrated Ticketing and Payment Systems

Some findings:

- Various initiatives have been adopted at the local and national levels; No cross-border integrated ticketing project;
- large variety of local and regional transport operators own programme
-> higher transaction costs for integrated ticketing providers;
- Lack of a common legal framework as one of the main barriers;
- Heterogeneity of national rules concerning road and rail transport services as a major issue;
- National legislators initiatives to promote data access for integrated mobility, moving beyond the basis of the Delegated Regulation (EU) 2017/1926. They may increase fragmentation and barriers across the EU;
- Respondents (consumer panels) rated integrated ticketing experience so far as good, satisfied with time-saving possibilities; need improvements on price, promotions, information;

Selected as EU relevant projects: **Full Service Model Initiative**, i.e. an interesting solution that combines technology and cooperation between rail transport stakeholders. FSM allows for future enhancements in the direction of other modes of transport

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Study on Remaining challenges for EU-wide Integrated Ticketing and Payment Systems

The Study did not perform an impact assessment

- The study showed that integrated ticketing systems requires smooth cooperation of various actors;
- A precise definition of the conditions for data access by third parties;
- strong public and private partnership, based on governance arrangements;
- support and participation of the public authorities to the initiatives;
- access to essential data: travel, traffic and fare data;
- guidance on licences and distribution agreement;
- common standards and interoperability;
- investments to support smaller service providers; and simple fare structure.
- the question of liability in case of erroneous information by third parties that would entail financial claims from travellers – raised but not tackled

Conclusions:

- **An in-depth market analysis should be carried out, including a definition of relevant markets, in order to identify areas for future intervention**
- **Each option proposed by consultant requires a market analysis and impact assessment**

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Conclusions by the COM on study



08.10.2019, Helsinki: Isabelle Vandoorne, Deputy Head of Unit
EC DG MOVE B4 Sustainable and intelligent transport

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Study on Passenger rights in the multimodal context



- EY was contracted by DG MOVE Unit B5 to carry out an impact study.
- This external support study is meant to assess the maturity of multimodal product that are existing in the market and the magnitude of the problems that passengers may experience in multimodal travels.
- CER has provided a consolidated PWG response to the study makers June 2018

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Market Size – a niche

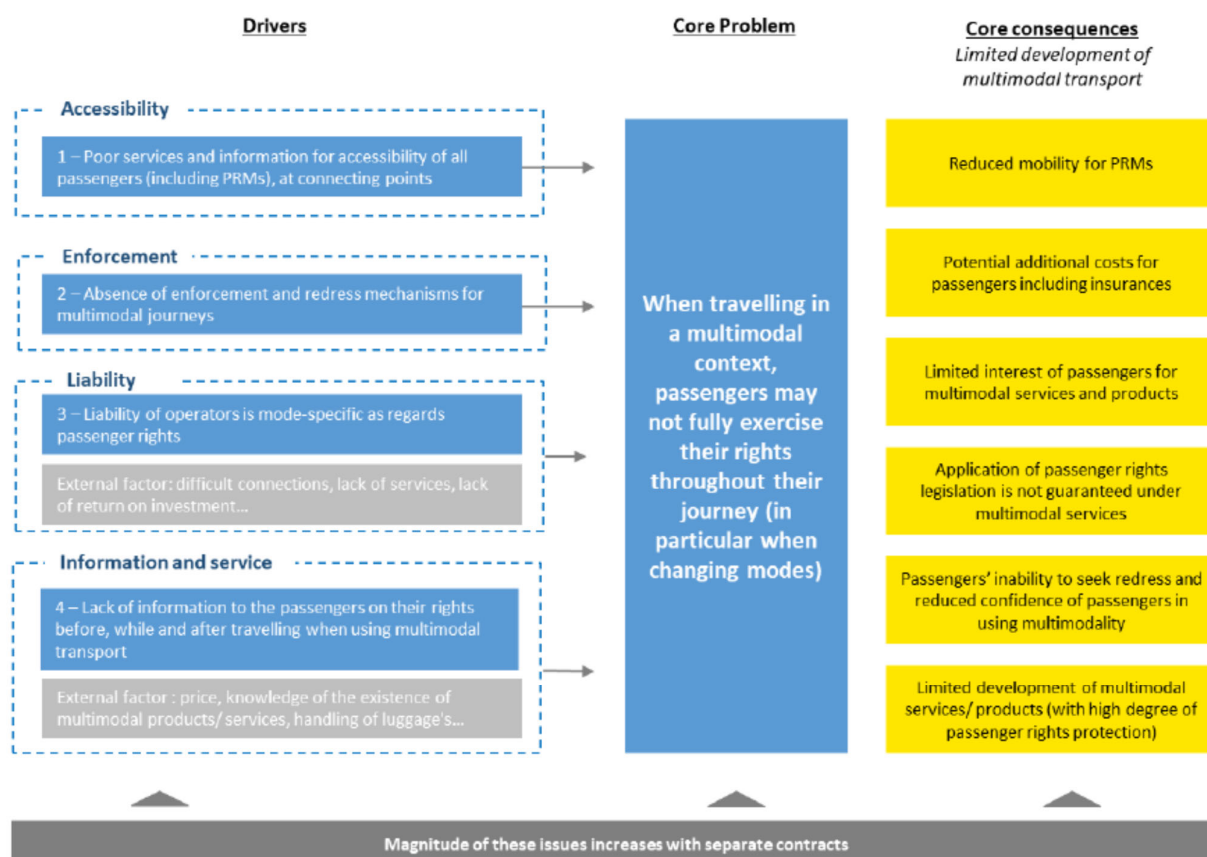
Table 1: Synthesis of market size (for all segments) 2016 – 2030, million Pax / year

Segment	Air – Rail	Air – Coach	Rail – coach	Ferry + other modes	Total
Multimodal products based on single contracts	2.1	1.1	0,0	~0	3.3
Multimodality based on separate contracts	40.6	20.9	0.9	~0	62.4
Total	42.7	22.1	0.9	~0	65.7
<i>Expected annual growth from 2016-2030 (in %)</i>	2.9%	2.8%	0.8%	~0	2.8%
Total expected in 2030	63.7	32.3	1.1	NA	97.0

Source: EY estimation based on Eurostat and data from interviews

Market estimated at 65.7 million PAX in 2016 (mostly air-rail). Single contracts = 5% of the market; separate contracts 95% of the market in 2016:

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EY findings and conclusions:

- EY created different policy packages:
 - a mix of soft-law measures (recommendations, code of conducts, etc.) and a new targeted legislative instrument (e.g. addressing accessibility issues) would provide the best trade-off between passenger welfare and profit for operators.
 - EY admits a large number of assumptions stemming from data limitations, which created difficulties to examine the effects
- The analysis of impacts of policy packages remains too uncertain to support definitive findings.
- Additional passenger rights would discourage the development of multimodal products and in the end, would have a negative impact on the development of multimodal transport.
- There is no guarantee that an action at European level would not hinder the development of multimodal transport today.
- Single multimodal products are more protective than the combination of products for multimodal journeys at the passenger's own initiative

Main conclusion: "it is better to wait and monitor closely the evolution of the market in the coming years, before taking any legislative action."

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Conclusions by the COM on study

Conclusion and next steps

- Mix of soft and legislative would be economically the best
- But given the limited size of the market and uncertainties, need to wait
- The new Commission will take these findings into consideration in view of improving passenger rights when travelling across modes
- Meanwhile, in the pipeline:
 - Eurobarometer on passenger rights (2019)
 - Evaluation of pax rights regulations and study on overall consistency (2020)



22.10.2019, Brussels: Frédéric Lagneaux, DG MOVE, B5 "Social aspects, passenger rights and equal opportunities"

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