

**SPUTNIC – First Working Groups meeting,
29-30 March, Barcelona**

Market Organisation Questionnaire, Integration and tariffs

1. General questions

8 experts answered the questionnaire

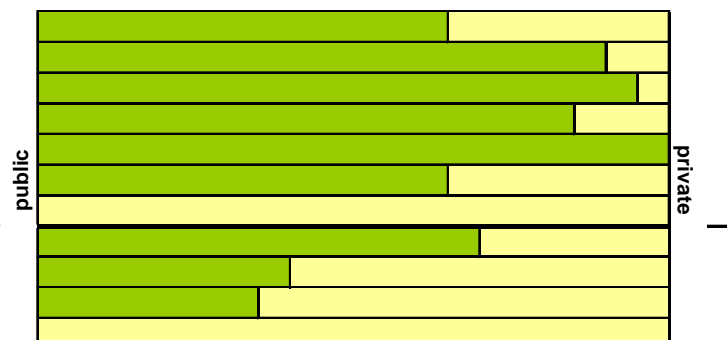
| E/W | Inhabitants | Public Service Contracts | Other type |
|-----|--------------|---------------------------|------------|
| E | 1.5 Mio | yes | |
| E | 1'200'000 | yes | |
| E | 720'000 | yes | |
| E | 1.7 mio | no | no |
| E | 120'000 | yes (net) | |
| E | 1'020'000 | yes (gross) | no |
| W | 2.8 mio. | yes, both (net and gross) | yes |
| W | 750'000 | - | - |
| W | 1.2 Mio | yes (self-supporting PT) | yes |
| W | 1.2 millions | - | - |

2. Is there competition in the urban/regional PT market?

| E/W | common pactice | Competition is | | | other form: |
|-----|----------------|----------------|---------------|------------|---|
| | | scarce | in the market | inexistent | |
| E | X | | | | |
| E | | X | | | |
| E | | | | | |
| E | | X | X | | tendering of a part of bus services |
| E | | X | X | | |
| E | | | | X | Only to compare a unit price for vehic.km |
| W | | X | X (scarce) | | |
| W | X (bus) | X (railway) | | | |
| W | X | | X | | |
| W | X | | | | |

3. What is the proportion of urban/regional PT operated by public or private operators?

| | Proportion | |
|---|------------|-----------------|
| | public | private |
| E | 65% | 35% |
| E | 90% | 10% |
| E | 93% | 7% |
| E | 84% | 16% |
| E | 100% | |
| E | 65% | 35% |
| E | | 100% |
| W | 70% | 30% |
| W | 40% | 60% (incl. SBB) |
| W | 35% | 65% |
| W | | 100% |



4. Is there an informal sector in PT and are informal actors seen as allies or competitors?

| informal sector | | |
|-----------------|----------------|---------------------------------------|
| | yes | no |
| E | | X |
| E | | X |
| E | | X |
| E | | X |
| E | | X |
| E | | X |
| E | X | |
| W | X (but scarce) | |
| W | | X |
| W | | X (only public and private companies) |
| W | | X |

5. Who is responsible for setting the tariffs in urban/regional PT?

| Responsible for setting tariffs: | | | |
|----------------------------------|---|---|--|
| | for public operators | for private operators | differences |
| E | the city directorate for PT | the city directorate for PT | |
| E | regional organizer of integrated transport system | | final approval is done by politicians |
| E | City public service regulator | passenger commercial transport licencing | Minibus routes operated by private operators have been ratified by the Passenger commercial transport licencing commission after operator's suggestion that all passengers should pay the full fare. There are no municipal subsidies for this form of transport |
| E | the City council | operating within the network: the City council, also many private bus operators getting concessions from regional authorities | competitive reasons, they claim lower costs etc. |
| E | CITY GOVERNMENT | CITY GOVERNMENT | |
| E | entitled authority | entitled authority | |
| W | operator and PTA together | operator and PTA together | |
| W | Tariff Ass. | Tariff Ass. | |
| W | region authorities | region authorities (tendered PT, Ministry of transportation and Communication) | regional authorities are paying the PT services, other PT services are self-supporting |
| W | | Region | |

6. What kind of tariff measures has been implemented in the past 5 years (for example new types of tickets for special target groups)?

| | |
|---|---|
| E | integrated tariff system established in 2003 |
| E | very few, almost nothing, "sliding passes" |
| E | Elderly people (75years old +) and primary school children are able to use municipal public transport free of charge, the 3rd group disabled people of sight and hearing are able to use PT with 75% discount. Elderly people till 75 years who's pension is less than 128 EURO have 50% discount of PT ticket or monthly card |
| E | the common periodical ticket (the same price) was introduced, it regard both PT and passenger train operators within the Warsaw area and partly outside the town |
| E | specific group of costumers are subventioned by city government. |
| E | There are different types of fare systems (single ticket for various duration of journey or various number of stops, zonal ticketing with month, trimester and year validity, validity from a day of purchase not from 1st day in month), the biggest change is cancellation of reduction for people over 70 years and members of resistance movement, but in Bratislava this kind of reduction is still valid. |
| W | renewal of total tariff system with the aim to provide a discriminating free revenue distribution between operators, who may compete against each other in the near future |
| W | Tariff Ass. for abonnements since 2002 |
| W | smart card system which allows different kinds of options of paying |
| W | student discount tickets and duo/family ticket |

7. What are the main elements of your tariff policy? Please rank by numbering from 1 to 5 (1 being the most important element, 5 the least important one)

| | max revenues | provide basic mobility | provide cheap mobility | improve modal split | other |
|---|--------------|------------------------|------------------------|---------------------|---|
| E | 1 | 3 | 2 | 4 | |
| E | 5 | 1 | 3 | 4 | 2 (provide integrated transport services, integrated tariff) |
| E | 2 | 3 | 1 | 4 | 5 (find balance between possible dotation (subsidy) and payability of passengers) |
| E | 5 | 1 | 3 | 2 | 4 (selling long-period contracts (monthly, quaterly tickets) |
| E | 3 | 1 | 2 | 4 | |
| E | 2 | 5 | 1 | 4 | 3 (to continue with refurbishment of busses to CNG) |
| W | 2 | 5 | 4 | 3 | 1 (provide a discriminating free revenue distribution) |
| W | 3 | 2 | 4 | 1 | |
| W | 2 | 1 | 4 | 3 | |
| W | 3 | 1 | 4 | 2 | |

8. Do you recognize any conflicts related to the tariff systems applied, for example different tariff systems used by different operators within the same area?

| | conflicts | | justified | |
|---|-----------|----|-----------|----|
| | yes | no | yes | no |
| E | | X | | |
| E | | X | | |
| E | X | | | X |
| E | X | | | X |
| E | | X | | |
| E | X | | | X |
| W | X | | X | |
| W | X | | | |
| W | X | | | X |
| W | | X | | |

9. What kind of harmonisation of tariff systems has been implemented in your city/region so far?

| | none | mutual acceptance on the same line | mutual acceptance within the same network | tariff associations | traffic association | others |
|---|------|------------------------------------|---|---------------------|---------------------|--------|
| E | | | X | | | |
| E | | | | | X | |
| E | | X | | | | |
| E | | X | X | | | |
| E | X | | | | | |
| E | | X | | | | |
| W | | | | X | | |
| W | | | | X | | |
| W | | X | | | | |
| W | | | | X | X | |

10. If tariff harmonisation or a common system in a region is not common: what are the main barriers to establishing such schemes?

| | tariff harmonisation or a common system in a region is not common, why: | Who is opposing them and why? | | |
|---|---|---|---|--|
| | | politicians | authorities | others |
| E | to continue to improve tariff harmonisation and integration, the actualisation of national legislation corresponding to..European framework is needed | problem of awareness | institutional organisation | lack of participation in discussions |
| E | Different mechanism of dotation and government support policy | | | |
| E | splitting the costs and revenues among operators, different bodies/authorities, governing PT inside Warsaw and outside as well as PT and the regional railway transport | | difficulties in calculating a number of passengers and costs to be covered by local authorities | the same difficulties concerning operators costs |
| E | different ownership of the operators | politicians, because they do not understand advantage of integration of common tariff system, they see only costs with regulatory authority and costs with new tariff equipment | all by their own reasons | |
| E | to effort of all actors (private bus company, railway company, public company for municipal PT in Bratislava) to keep their revenues on contemporary level, | | authorities, because reason like politicians | operators, because look above regarding effort to keep revenues |
| W | Market failure: Missing strong actor (e.g. PTA) who engages himselfe in this subject | | | operators, because they fear the need to provide informations on revenues to other operators |
| W | | | | operators, because losing tariff competence |
| W | | | not willing to co-operate with self-supporting PT companies | part of the PT is self supporting and part is tendered, self-supporting operators have their own smart card system which is valid in whole Finland except in five biggest cities |
| W | | | | |

11. What are the 3 most pressing problems related to tariff systems and the forming of traffic associations or the introduction of other new PT structures in your country?

| | 1 | 2 | 3 |
|----------|---|---|---|
| E | no problems related to tariff systems as indicated. Strong interest for implementation of new technologies. | | |
| E | lack of research and, in the same time a lack of Good/Best practices, lack of comparisons culture, and of identification of main problems | lack of new technologies (Smart cards) | the reasons indicated in the question 10 |
| E | There are different funding mechanisms in state and Riga Municipality | Given discount policy | Minimal government support to City Municipality |
| E | lack of sufficient legal solutions | mentioned in question no. 10 | |
| E | legal problems | owner ship | technical problems |
| E | lack of legislation framework | lack of good practise to follow | lack of public funds for PT |
| W | Market failure (see above) | Missing technical solutions to provide clear discriminating free revenue distribution | Weak PTA |
| W | building integrated tariff union | procurement ticket automat with corresponding software to the tariff system | - |
| W | 2 different smart card systems | co-operation between regional authorities and self-supporting companies | - |
| W | no problems, in the early 80's PTA were organised in each county by law | | |