



5th Research Seminar on Railway Policy – Lyon – 4 November 2016

Venue: Institute of Political Studies (IEP - Salle du Conseil – 3rd floor)
14, avenue Berthelot – 69007 - LYON

Rail passenger services and the new deal of intermodal competition (low cost airlines, coaches, carpooling, car sharing....)

Passenger transport has long been characterised by intermodal competition. Even if each mode of transport had a specified market segment where it could develop essentially free from competition, competition remained at the edges of the modes' respective areas of influence. However, in recent years the borders of these areas of influences have shifted, for various reasons:

- Lower oil prices have reduced the relative cost of air transport and road passenger transport (buses, cars ...);
- New "business models" (low cost) allowed the airline to continue its growth while the weak economic growth observed since 2008 has led in many European countries to a stabilisation of rail traffic;
- The recent deregulation of coach transport in countries such as Germany and France questioned the relevance of certain rail links and, more generally, subsidised regional and national public transport;
- New features of smart phones and applications have developed a collaborative economy (car-pooling with Blablacar, car-sharing, rental of private cars with Drivy, etc.).

The market shares of different modes of transport are therefore changing structurally. Holiday destinations are now defined in terms of the offerings of low-cost operators. Modes such as buses and car-pooling could eventually account for 10-15% of long-distance ground transport, primarily at the expense of rail operators. European transport policy is particularly challenged. The white papers of 2001 and 2011 called for a revitalisation of the rail sector. This was backed both through financial support for the development of railway infrastructure (TEN-T) and deregulation designed to lead to both favourable competition for users and rail renewal.

However, this vision is now disputed. High-speed trains are developing in Europe but, with certain exceptions, they will not replace medium-haul flights as hoped for in the 2011 White Paper. Intercity and regional trains face competition from low-cost carriers and coaches and to some extent from carpooling. Far from leading to revitalization, competition could therefore lead to a contraction of necessary rail services especially if we take into account the growing scarcity of public funds. Hence, transport policies are challenged by the new deal of intermodal competition. To what extent is it necessary, or not, relevant, or not, to limit the level of subsidies to the rail sector? Can we consider that rail passenger services have to be adapted?





Agenda

9:00 Coffee and Welcome

9:30 Introduction by Prof. Yves Crozet: Objectives and content of the Seminar

9:45 1st session: The new frontiers of intermodal competition

- *Long distance passenger services and the limits to high speed rail supply* (EU Transforum Project)
Cecile CHEZE (LAET) and Christian DESMARIS (LAET)
- *Low cost airlines and air traffic development*
Pr. Rosario MACARIO (IST- Lisbon)
- The development of Coach services in Germany and impacts on rail services
Cornelia GREMM (KIT)
- The effects of intermodal and intra-modal competition on railway markets
Dr. Julien BRUNEL, SNCF-Réseau, Head of Economic Analysis Service.

12.30: Lunch Break

13:30: 2nd session: A new deal for transport policies and mobility suppliers

- Intra-modal and intermodal competition: a key component of passenger services
Fares GOUCHA (TRANSDEV)
- Long distance passenger services: how to regulate competition?
Dr. Anne YVRANDE-BILLON (ARAFER)
- Investment in transport infrastructures and new trend of mobility (From EU Benefit Project)
Pr. Thierry VANELSLANDER (University of ANTWERP)
- The impacts of digitisation on supply and demand of long distance passenger services
Pr. Yves CROZET (University of LYON, LAET)

16:00 Panel discussion, moderated by Prof. Kay Mitusch

16:30 End and Coffee

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