

ACTIVITY REPORT 2024

*Contributing to the development
of sustainable mobility*

*Activity
at a glance*





TABLE OF CONTENTS

- ◆ Editorial by the President | **04**
- ◆ ART in brief | **06**
- ◆ Board members | **16**
- ◆ Our values | **18**
- ◆ Transport overviews | **20**
- ◆ An active year at the service of users & mobility | **30**
- ◆ Measuring the performance of ART's action | **32**
- ◆ A year marked by the evolution of ART's competencies | **46**
- ◆ Review of ART's action in 2024 with regard to mobility issues | **50**
- ◆ Focus on multimodality | **58**
- ◆ Legal actions by ART: a tool for improvement | **66**
- ◆ A regulator closely linked to the transport ecosystem | **72**
- ◆ All at the service of users & mobility | **84**
- ◆ Organisation & resources | **86**





EDITORIAL BY THE PRESIDENT

**BY THIERRY
GUIMBAUD
PRESIDENT OF ART**

2 024 marked the beginning of my mandate as President of the **Autorité de régulation des transports (French Transport Regulatory Authority - ART)**.

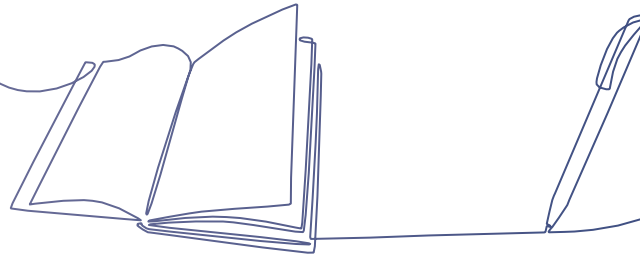
This first year allowed me to fully appreciate the essential role of the regulator for the economically viable functioning of a structural sector, at the heart of the challenges of purchasing power, competitiveness, ecological transition, and regional planning.

With a workforce limited to around a hundred agents to regulate six transport sectors, in its fifteen years of existence, ART's actions have already enabled real progress for the benefit of users. As a regulator, ART has thus played a decisive role in opening up rail transport to competition. The benefits of this dynamic are confirmed more and more every day: since 2019, usage of the Paris–Lyon high-speed route has increased two times more than the rest of the high-speed routes, the offer has increased by 15%, and the price has dropped more than 10%; for public service obligation, calls for tender have generated savings of 20 to 30%, bringing production costs closer to European averages. On the motorway concession network, ART has enabled substantial savings for users, both on tolls and fuel, amounting to several hundred million euros.

At the end of last year, ART adopted a new strategic project, a real roadmap until 2030 for transport regulation to assist in the adaptation of infrastructure to future needs, from fluid mobility to controlled and sustainable costs, fostering a culture of dialogue and continuous improvement.



In order to promote transport infrastructures in line with future needs, ART clarified the conditions for the end of historic motorway concessions in its third report on the general economy of concessions, highlighting the importance of specifying the end-of-contract obligations, whose financial stakes amount to several billion euros. It made recommendations to strengthen confidence in the independence of SNCF Réseau (the infrastructure manager for the French national rail network), a key factor in the effective opening of the rail market for the benefit of users. In Île-de-France, it contributed to the emergence of a shared solution for the reception of long-distance coaches following the announcement of the closure of the Bercy station by the city of Paris.



In order to ensure fluid mobility at controlled prices, ART has fully assumed its role as economic regulator in the airport sector, setting the fees of an operator whose prices were clearly overvalued. It encouraged RATP (Parisian Autonomous Transport Administration) to implement multi-year pricing geared towards the costs of an efficient operator for its night services. In the field of multimodal digital services, it has made structuring decisions in the context of dispute settlements aimed at facilitating their development, in particular by imposing the publication of the contractual conditions relating to the distribution of digital tickets.

With the aim of promoting more sustainable mobility, ART has continued to support the opening of mobility data, in order to promote the development of comprehensive multimodal information tools, integrating environmental impacts: the report published at the beginning of 2025 shows specifically how its regulatory interventions have made it possible to enhance the digital data published on the national access point. ART has also played an active role in the overhaul of the regulatory framework applicable to motorway service areas. This overhaul of the regulatory framework was initiated following the alerts it issued last year on the level of financial charges paid to concessionaires, in order to moderate the price of electric recharges in the future.

Finally, ART reaffirmed its European roots and its openness to dialogue with all its stakeholders.

In 2024, it conducted 41 hearings, 3 public consultations and 9 parliamentary hearings, and signed a memorandum of understanding with the Italian Transport Regulatory Authority.

At the time of writing, the financing of mobility has become a central issue in the public debate, with the 'Ambition France Transports' conference launched by the Government in May 2025. The analyses published by ART in recent years – on regulated markets, motorway concessions or long-term scenarios for the rail network – are a valuable contribution to this work: they illustrate the role of shedding light on public decision-making that the regulator can play through its work. This is a major expectation by the legislator.

I would like to acknowledge the commitment of the members of the board and ART's teams, and to thank Philippe Richert in particular, whose term of office as Vice-President ended in November 2024. He served as interim President for nearly eighteen months, until my appointment.

With this momentum, we will continue our efforts in 2025 at the service of independent, transparent and efficient regulation, fully mobilised to support the transformation of mobility towards a more sustainable future.

Thierry Guimbaud, President of ART

A blue ink handwritten signature, appearing to be 'T. Guimbaud', written in a cursive style.



ART IN BRIEF

In 2024, the French Transport Regulatory Authority (ART) worked to improve the operation of the transport sector and for sustainable mobility, carrying out the missions entrusted to it by law.

Through the commitment of its board and its agents, ART has thus contributed to promoting quality mobility that is more sustainable and at the best price¹.



€15 M

**budget
allocation
for 2024**



5

**active board
members
in 2024**



96

**agents
as at 31 décembre
2024**

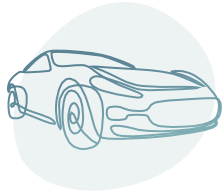
| API

The French Transport Regulatory Authority (ART) is an independent public authority.

An independent public authority (API in French) is an administrative body with legal personality (a legal entity under public law), which acts on behalf of the State, without being under the authority of the Government.

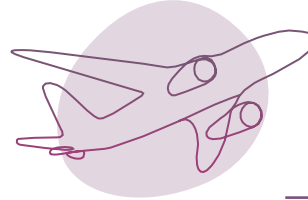
| GAINS FOR THE ECONOMY

In accordance with its missions as a sectoral economic regulator, ART works to contribute to the construction of a competitive and efficient transport sector in the interest of users and operators using transport infrastructure.



€700 M

Since it has been responsible for the motorway concession sector, ART has enabled motorway users to benefit from savings of more than 700 million euros, including savings of 400 million euros on fuel distribution and 300 million euros on tolls, equivalent to 15% of the increases that were initially envisaged.



€76 M

Since taking over responsibility for the airport sector in 2019, ART has limited increases in prices paid by airlines for their use of airport infrastructure by nearly 76 million euros.



2.279

This is the number of intentions to operate a new road passenger transport service notified to ART since October 2015, when the arrival of new road passenger service operators on the French road network became possible. 351 new notifications from operators planning to offer new road passenger services were communicated to ART in 2024. Since the liberalisation of these services, this new transport offering has allowed users to travel throughout France at low prices and with a reduced environmental impact.

58 % of direct gains

are due to the withdrawal of costs incumbent on the concessionaire or investments in unproven utility

42 % of direct gains

are due to better economic configuration of the amendments



+ €400 M

of savings for fuel distribution

+ €300 M

in savings for users in terms of tolls

51



This is the number of intentions to operate a new rail service notified to ART since December 2020, when the arrival of new railway undertakings on the French network became possible with the opening up of rail passenger transport services to competition. These new services are likely to promote an increasingly more tailored response to the needs of travellers (connection, price, punctuality, quality of service, on-board services, etc.).

- ◆ **6 new notifications from railway undertakings**, planning to offer new deregulated rail services, were communicated to ART in 2024 (three by Kevin Speed, two by Trenitalia France, and one by Arriva NL), a total of 51 since the opening up of rail passenger transport services to competition;
- ◆ **7 lots of public service obligation services (PSO services) were awarded** at the end of 2024 and since the mandatory award by calls for tender (2023) by various transport organising authorities (the Provence-Alpes-Côte d'Azur, Île-de-France, Hauts-de-France and Pays de la Loire regions), of which three were awarded to SNCF Voyageurs, one to Keolis-SNCF Voyageurs Group, two to Transdev, and one to RATP Cap Île-de-France;
- ◆ **11 lots of PSO services were the subject of calls for tender** at the end of 2024, while more than 40 lots are yet to be awarded under competitive tenders by 2034.



DID YOU KNOW?

Why should the lots of PSO services be put out to tender before 2034?

European Union law establishes the principle of the competitive award of public passenger transport service contracts, also known as 'PSO services', with the aim of guaranteeing safe, efficient, and high-quality services, and providing users with the benefits of regulated competition. Until that date, the regions had the option to sign an operating contract with the operator of their choice, without necessarily going through a competitive tender, for a maximum period of ten years. Since 2023, the majority of regions have gradually put the lots of their PSO services up for tender, but more than 40 lots (out of nearly 50) are yet to be awarded by competitive tender by 2034. The Brittany, Occitanie and Centre-Val de Loire regions, which had renewed their contract in 2023 with SNCF Voyageurs for ten years, have not, at this stage, specified the lots and the schedule for putting their offer out to tender by the end of their contract. From 2034, the entire contracted rail offer of these regions must have been the subject of a competitive tendering procedure.

ART ADOPTS ITS STRATEGIC PLAN FOR THE PERIOD 2024–2029

The transport sector is marked by multiple challenges that are at the heart of concerns of transport users, and more broadly of all our fellow citizens: price control, accessibility of transport, quality of infrastructure and service provided to the user, and ecological transition. The economy must adapt to societal challenges, particularly climate change, which require a profound revision of our operating methods.

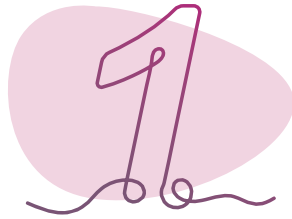
These challenges have called on ART to define its new priorities.

The opening up of rail passenger transport to competition, the end of historic motorway concession contracts, and the development of the airport regulatory framework are all challenges that the regulator must integrate into its support action in a careful and proactive manner. The development of digital mobility services to streamline the users' journey, the opening up of urban transport services in Île-de-France (metro, RER – Regional Express Network) to competition, as well as the monitoring of the access by coaches to strategic road infrastructure will also be part of the regulator's action.

The development of ART's strategic project was based on an open and collaborative approach. The project was put together following internal discussions within ART's teams and consultations with the sector's institutional and operational stakeholders: economic operators and researchers in economics and regulatory and transport law. Its publication marks the beginning of a new period for ART.



ART's strategic project aims to work towards an economic regulation of transport that is useful, constructive and effective, through the definition of four priorities:



Promoting transport infrastructures in line with future needs

This priority calls for rigorous monitoring of the performance offered by infrastructure managers and fair treatment of the various stakeholders in the sector.



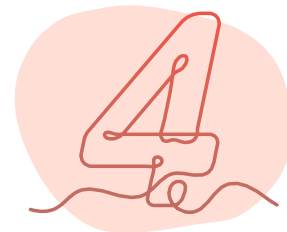
Working towards sustainable mobility

In coordination with other stakeholders in the sector, ART intends to mobilise its action to support the development of less polluting modes of transport, environmental pricing, and the implementation of effective green investments.



Ensuring fluid mobility and controlled prices

The cost of transport weighing heavily on the purchasing power of households as well as on the competitiveness of businesses, ART contributes to the control of prices and the quality of mobility for users by removing the entry barriers encountered by transport operators, and by promoting transparency and access to travel information.



Fostering a culture of dialogue and continuous improvement

Openness to dialogue and questioning and listening to points of view in all sectors enables ART to enhance its regulatory action in contact with stakeholders, thereby capitalising on a cross-disciplinary approach to the sector's challenges to optimise the workings of the transport sector.



| ART'S MISSIONS

The law has entrusted ART with regulatory, control and economic and technical expertise missions, aimed at ensuring the proper functioning, particularly from a competitive point of view, of markets in the transport sector. These missions require the intervention of a public institution that is an integral part of the State, while remaining independent from the Government.

Art regulates several essential infrastructure managers in the monopoly transport sector through a range of competences that vary for each of the areas it regulates, and which are likely to cover both the pricing conditions and the operational conditions of access to these infrastructures.

To this end, its scope of action:

- historically covers the essential infrastructure of the rail system (since its creation in 2009);
- then expanded to coach stations, airports, and certain monopolistic activities carried out by RATP in Île-de-France (security, management of the infrastructure of the historic metro and RER network, technical management of the Grand Paris Express).

In terms of control, ART intervenes in particular:

- in the motorway sector, to control (i) amendments to motorway concession contracts, by providing an objective and independent perspective on the merits of user financing, the operations envisaged and their terms, (ii) new concession contracts, as well as (iii) contracts awarded by motorway concession companies;
- in the field of digital mobility services to control the public availability and correct reuse of mobility data.

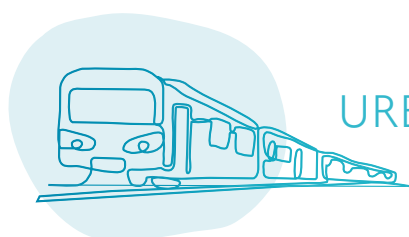
Finally, ART disseminates data, which it collects from stakeholders in the sector, and **sectoral analyses** in the field of rail transport, road passenger transport, motorway concessions, and airports. It also publishes an annual report on mobility aimed at presenting market observations in a multimodal perspective.





RAILWAYS

- ◆ ART ensures that all companies wishing to provide rail services in France can do so, by having transparent, fair and non-discriminatory access to the railway infrastructure essential for the provision of rail services (national rail network and service facilities, such as stations).
- ◆ It ensures the independence of the infrastructure manager, SNCF Réseau, and the sole manager of the stations, SNCF Gares & Connexions, vis-à-vis the commercial entities of the SNCF group.
- ◆ It monitors the financial trajectory of SNCF Réseau to ensure its robustness and consistency, particularly with regard to the objectives of the performance contract between the State and SNCF Réseau, on which it also issues an opinion to the Government and whose implementation it oversees.
- ◆ It can settle disputes between railway undertakings, transport organising authorities (regions, State), infrastructure managers and operators of service facilities, which are referred to it, and can trigger a sanction procedure in the event of a breach by the stakeholders of the rail system of their obligations (in particular with regard to access to or use of the rail network or service facilities).
- ◆ It ensures the economic regulation of the Channel Tunnel with its British counterpart, the Office of Rail & Road (ORR).



URBAN PUBLIC TRANSPORT IN ÎLE-DE-FRANCE

- ◆ ART regulates the activities carried out as a monopoly by the Régie Autonome des Transports Parisiens (RATP), namely:
 - infrastructure management of the historic metro and RER network;
 - technical management of the Grand Paris public transport network;
 - provision of security services.
- ◆ It approves the rules of accounting separation between the various activities of RATP (transport operator, infrastructure management, technical management of the Grand Paris public transport network, and security services provider).
- ◆ It settles disputes between RATP, the transport organising authority (Île-de-France Mobilités), and any operator of the Grand Paris public transport network referred to it and can trigger a sanction procedure if necessary.



- ART regulates the airport charges at the largest French airports. In this capacity, it annually approves the airport charges submitted to it.
- It can also give a reasoned opinion on all the economic and financial parameters of the preliminary drafts of the economic regulation contract (CRE in French) and decides, by an assent, on the draft CRE.
- It carries out an economic and financial monitoring assignment for airports within its area of competency in order to shed light on public decisions.
- It is responsible for setting, by a regulatory decision, the principles governing the rules of accounting allocation between regulated activities (in particular, airport activities) and those that are not (in particular, commercial activities).



- ART ensures the proper functioning of the motorway toll pricing system. As such, it is consulted, on the one hand, on draft new concession contracts, and, on the other hand, on draft amendments to existing contracts when they have an impact on toll prices or the duration of the concession.
- It carries out an economic and financial monitoring assignment for the sector.
- It ensures the exercise of effective and fair competition when awarding contracts (works, services, etc.) for motorway concession companies and compliance with the procedures for awarding operating contracts for service stations and other ancillary commercial facilities (in particular, the obligation of pricing moderation for the distribution of fuels).
- It also carries out a registration assignment for European Electronic Toll Service (EETS) providers, maintains the national electronic EETS register, and carries out a conciliation assignment between toll collectors and EETS providers.



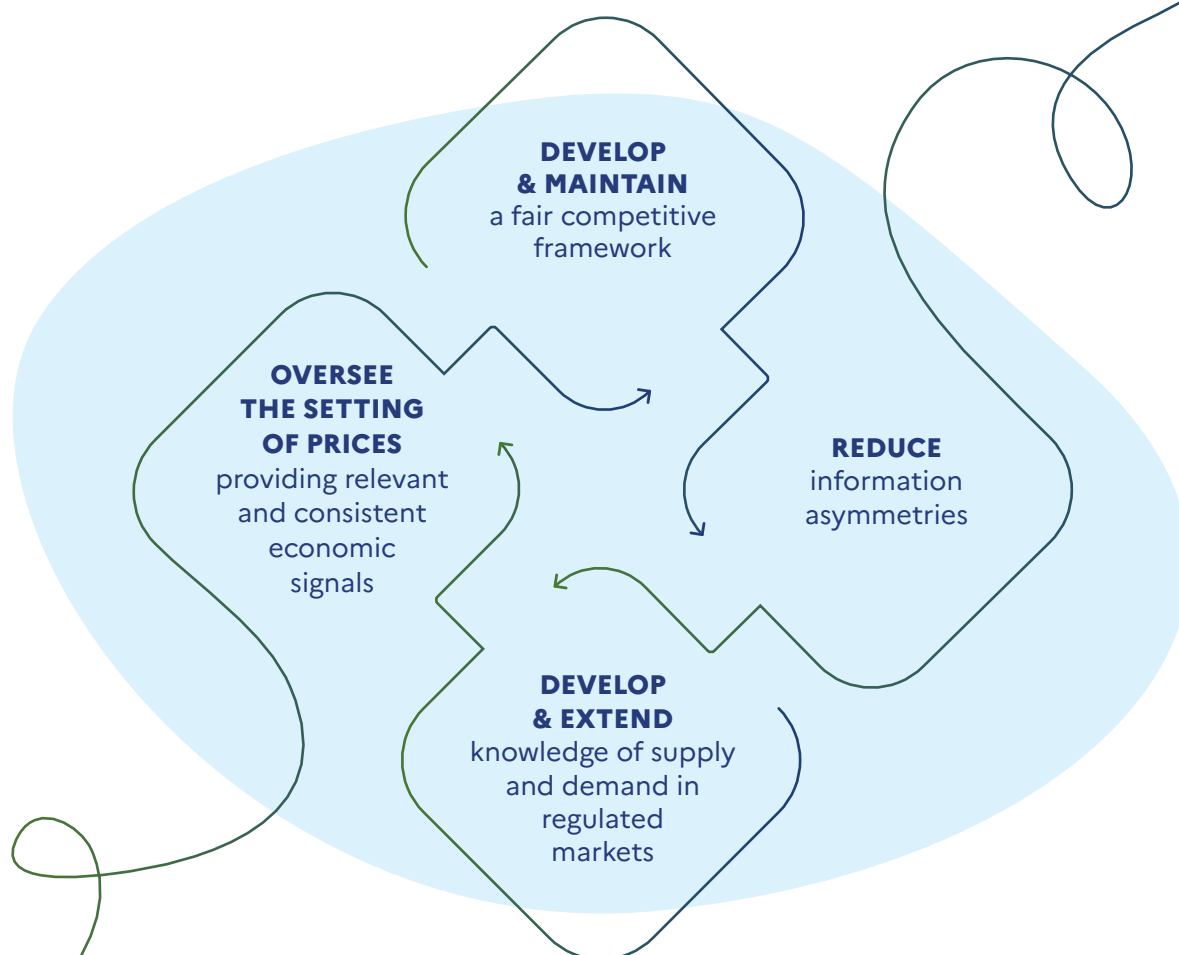
- ART regulates independently run private coach transport serving an intercity link of 100 kilometres or less.
- It controls the rules of access to coach stations and road transport facilities in order to ensure the conditions for effective competition.
- It has the power to settle disputes referred to it between road passenger transport operators and coach station managers; it can trigger a sanction procedure in the event of a breach by the stakeholders of their obligations.
- It carries out a general observation mission of the road passenger transport market.



DIGITAL SERVICES AND MOBILITY DATA

- The opening up of mobility data, which ART is responsible for controlling, aims to promote the development of digital mobility services, such as websites or applications for finding the best route, consulting timetables, getting about, or taking advantage of other mobility services.
- ART ensures the effective provision of mobility data, by data producers, on the national access point (PAN), their compliance with formats, their updates, and their quality. It also verifies the use of this data by digital mobility services, and in particular, that the offers made to travellers do not mislead them.
- It supports the development of digital mobility services such as mobility by association of services (MAS) or MaaS (Mobility as a Service), platforms grouping within a single application the mobility offers (information and tickets) for different modes of transport. Control is exercised through active monitoring, its power to settle disputes referred to it, and the opening of a sanction procedure if it finds a breach by the stakeholders of their obligations.

THE 4 PILLARS OF ART





MEMBERS OF THE BOARD

PRESIDENT THIERRY GUIMBAUD

Thierry Guimbaud was appointed President of ART by decree of the President of the French Republic on 29 December 2023, succeeding Bernard Roman.

Director General and a former student of the ENA (class of 1990–1992 'Condorcet'), Thierry Guimbaud began his career in 1982 at the Ministry of the Economy and Finance as a commissioner in charge of competition investigations, in particular, in the field of public works.

In 1992, he joined the Ministry of Equipment as head of the Motorway Concession and Financing Office, where he was responsible for the financial programming of investments in motorways and other concession works.

In 1996, Thierry Guimbaud joined Aéroports de Paris, then a public establishment, as head of the Strategy Department, where he was responsible for managing major strategic projects, before taking over as head of operations at Charles-de-Gaulle airport in 1998.

In 2005, he became Director of Transport Services and Operations at the Île-de-France Transport Union (STIF), now Île-de-France Mobilités (IDFM), where he was responsible for defining transport policy and its implementation through public service contracts with major public and private operators.

Having become Director of Transport Services within the Ministry of Transport in 2011, he led the drafting of the law of 4 August 2014 on railway reform, which considerably strengthened the powers of the regulator.



In 2017, Thierry Guimbaud took up the position of Managing Director of Voies Navigables de France (VNF), until his appointment as President of ART in December 2023.

| THE VICE-PRESIDENTS



FLORENCE ROUSSE

Florence Rousse was appointed Vice-President of ART by decree of the President of the French Republic on 19 May 2020, on the Government's proposal.

A General Engineer of Bridges, Waters and Forests, and a graduate of the École Polytechnique and the École Nationale de l'Aviation Civile, Florence Rousse began her career in 1981 at the Directorate General of Civil Aviation (DGAC), where she was Director of Economic Regulation in 2007, then Director of Civil Aviation Safety from 2009 to 2014. From 2014 to early 2020, Florence Rousse was Director General of the Public Railway Safety Establishment (EPSF).

Patrick Vieu was appointed Vice-President of ART by decree of the President of the French Republic on 19 May 2020, on the Government's proposal.

Patrick Vieu started at the Ministry of Transport in 1993. He joined the Cour des Comptes (Court of Auditors – France's supreme audit institution) in 'mobility' from 1997 to 1999, before becoming Deputy Director of Concession Motorways and Works from 1999 to 2004. He was Director of Rail and Public Transport at the Ministry of Ecology, Sustainable Development, Transport and Housing from 2005 to 2008, then Director of Transport Services in the same ministry from 2008 to 2011. He was an 'environment and territories' adviser, in charge of transport and sustainable development issues at the Presidency of the Republic from 2012 to 2014, and then an adviser to the Vice-President of the General Council for the Environment and Sustainable Development.



PATRICK VIEU



SOPHIE AUCONIE

Sophie Auconie was appointed Vice-President of ART by decree of the President of the French Republic on 24 March 2021, on the proposal of the President of the National Assembly.

Graduated of the École Supérieure de Commerce et de Management (ESCEM) in Tours, Sophie Auconie was a territorial consular officer at the Touraine Chamber of Commerce and Industry from 1993 to 2006 and was also an artisan and consultant. Elected as a Member of the European Parliament in 2009 in the Massif Central-Centre constituency, she was appointed co-president of the French Water Circle and elected governor of the World Water Council in June 2012. From June 2017 to February 2021, she sat in the National Assembly as a deputy in the 3rd constituency of Indre-et-Loire.

Appointed Vice-President by decree of the President of the French Republic on 9 November 2018, on the proposal of the President of the Senate, Philippe Richert held the interim presidency of ART from 4 August 2022 to 29 December 2023. His term of office ended on 8 November 2024.

Former professor of natural sciences, Philippe Richert has had a career of nearly 20 years in the Ministry of National Education. Elected for the first time to the General Council of Bas-Rhin in 1982, he served as President from 1998 to 2008. He became Senator for the Bas-Rhin in 1992, and held the positions of Vice-President and Quaestor between 2004 and 2010. In 2010, he was elected President of the Regional Council of Alsace. In the same year, he was appointed Minister for Local Authorities in the Government of François Fillon. In 2016, he became President of the Association of Regions of France as President of the new Grand Est region.



PHILIPPE RICHERT

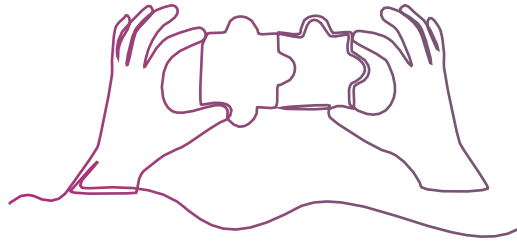
His term of office ended in 2024



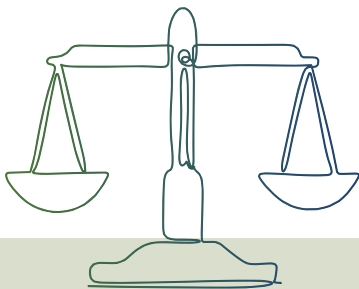
OUR VALUES

Public interest, expertise, impartiality and dialogue are the core values that guide and drive ART's activities in its daily work.

| PUBLIC INTEREST



- ◆ ART, as a public authority, carries out missions serving the public interest.
- ◆ The daily commitment of ART's teams directly benefits transport stakeholders: mobility organising authorities, transport companies, and end users.
- ◆ More broadly, ART promotes an internal culture based on the quality of individual and collective work, collaboration and continuous improvement, allowing everyone to be a full participant in the collective success and achievement of ART's objectives.
- ◆ The collective value of the missions entrusted to ART is a driving force for ensuring its employees remain motivated and committed.



| IMPARTIALITY

Impartiality is a fundamental value of ART, reflecting a desire for neutrality and fairness in the treatment of stakeholders, and objectivity and transparency in its decisions and opinions.

ART conducts its analyses impartially, taking into account the positions of all stakeholders during its operations.

Independence vis-à-vis all stakeholders in the sector is a sine qua non condition of this impartiality. It implies an important responsibility for ART and presupposes the securing of its financial and human resources.

Internally, impartiality is the collective line of conduct, guaranteed by compliance with the rules of ethics that apply to all.

| DIALOGUE

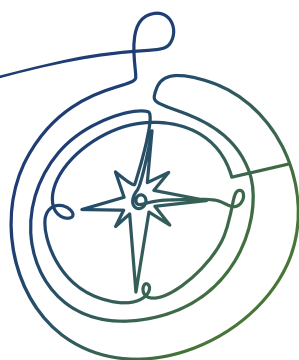


ART is committed to conducting an open, constructive and regular dialogue with all stakeholders in the sector.

This dialogue is essential to enrich its opinions and decisions, and to enhance its in-depth knowledge of the regulated sectors.

Public consultations and hearings provide an opportunity to gather stakeholder insights on specific issues. ART also strives to consult the stakeholders concerned before publishing its reports and studies.

More broadly, listening and dialogue are practices that ART attaches great importance to, both in its internal operations and in its daily interactions with stakeholders.



| EXPERTISE

- ◆ To guarantee the reliability of its actions, ART combines knowledge of the transport sector, methodological rigour, and know-how.
- ◆ Bringing together a range of competencies – economic, legal, financial, sectoral, data analysis – ART’s board and its services ensure the quality of all its decisions, studies and recommendations, thereby guaranteeing the reliability of the data mobilised, the objectivity of its analyses, and the rigour of its methods and reasoning, whether legal, economic or financial.
- ◆ ART has a particular interest in maintaining and constantly developing the competencies of its teams in order to continuously address the new challenges of the sector.



TRANSPORT OVERVIEWS

MOBILITY OVERVIEW

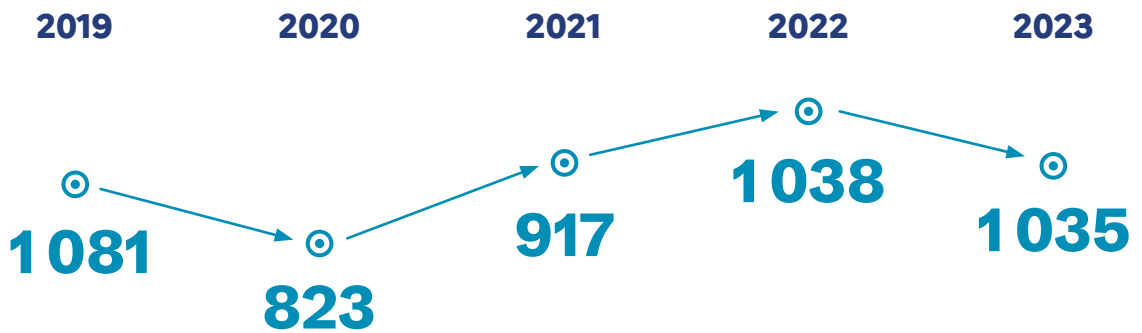
Discover the key figures¹ for transport in France and the distribution of journeys (rail, coach, plane, car, etc.), as well as information on greenhouse gas emissions related to transport.

¹ Figures for 2023, as the figures for 2024 are not yet known at the date of publication of this report.

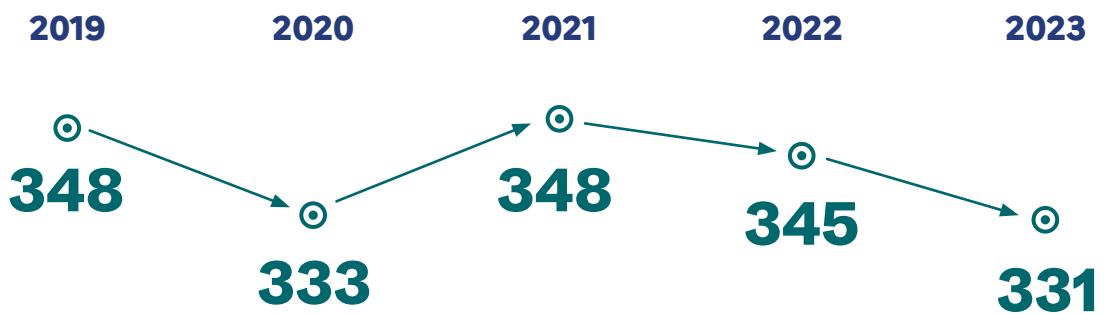
PASSENGERS AND GOODS TRANSPORTED



Passengers (bn passenger.km)



Freight (bn tonnes.km)



Sources: Data and Statistical Studies Department (SDES) of the Ministry of Ecological Transition and ART.

Note: 'Passengers' data includes private vehicles, road transport (coach, bus and tram), rail transport (high-speed trains, Intercity trains, regional express trains (TER), regional express network (RER), Transilien trains, metro in Île-de-France and outside Île-de-France), and air transport.

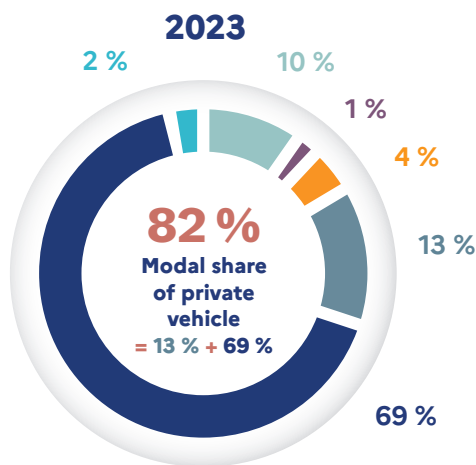
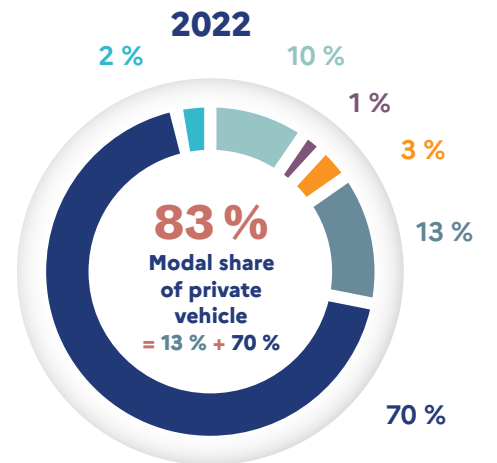
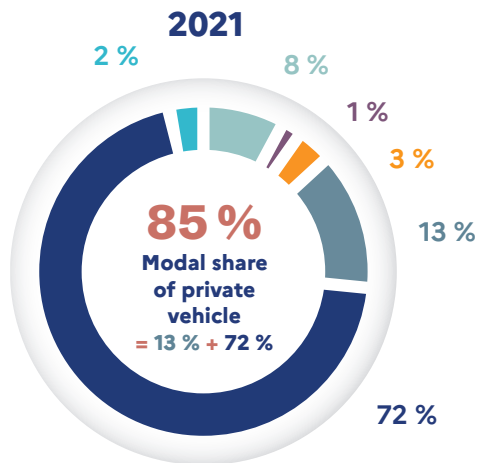
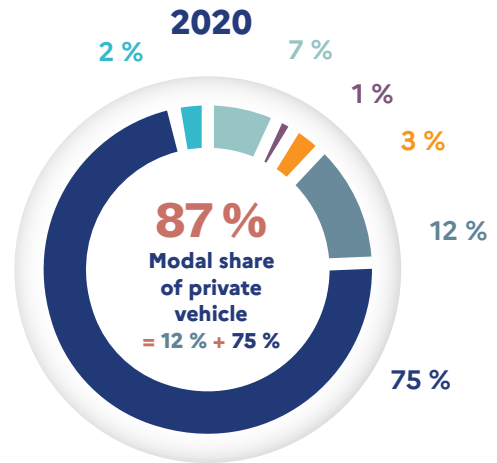
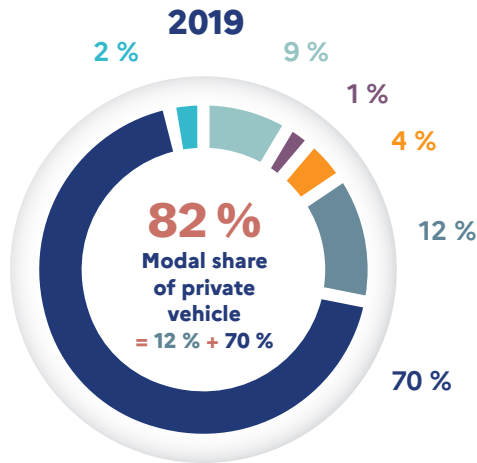
DISTRIBUTION OF JOURNEYS BY MODE OF TRANSPORT IN FRANCE





DID YOU KNOW?

What is a modal share?

The modal share refers to the proportion represented by the use of a given mode of transport (private vehicle, train, plane, coach) among all journeys made in a territory.

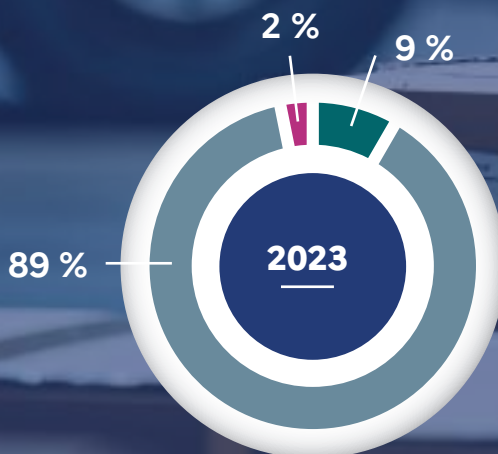
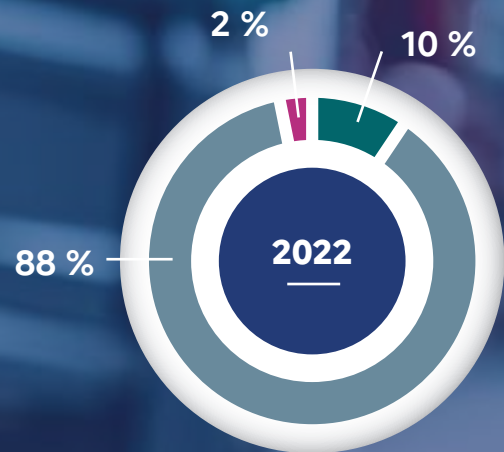
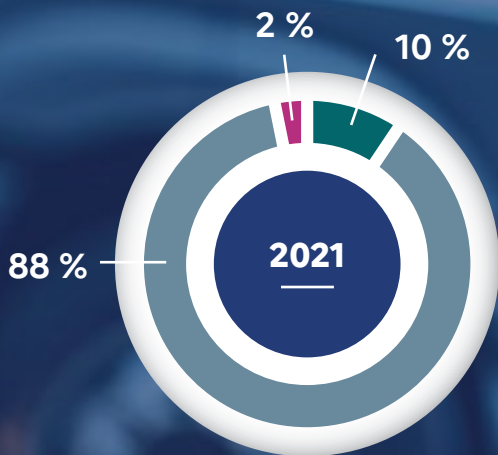
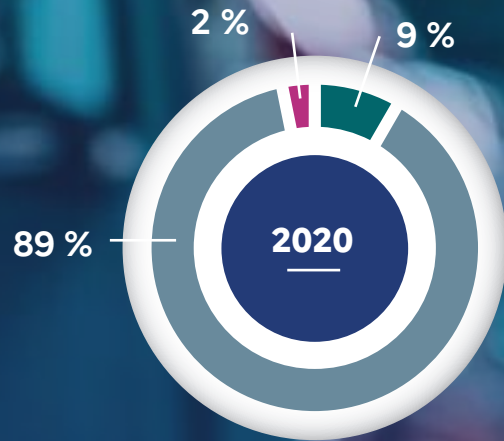
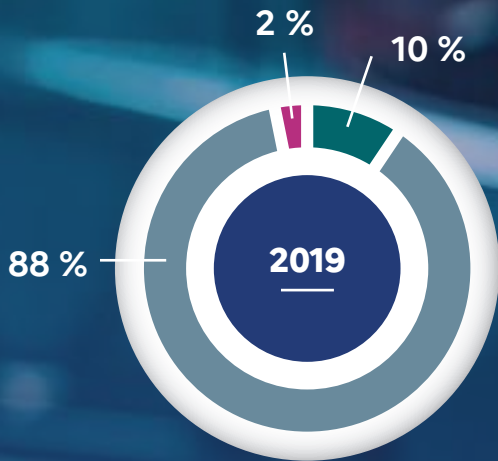
PASSENGER MODAL SHARES (IN PASSENGERS.KM)



-  Rail transport
-  Domestic air transport
-  Coaches
-  Private vehicles on toll motorways
-  Private vehicles excluding motorway concessions
-  Urban public transport

Source: Data and Statistical Studies Department (SDES) of the Ministry of Ecological Transition and ART for rail, motorway and independently run private coach transport.

FREIGHT MODAL SHARES

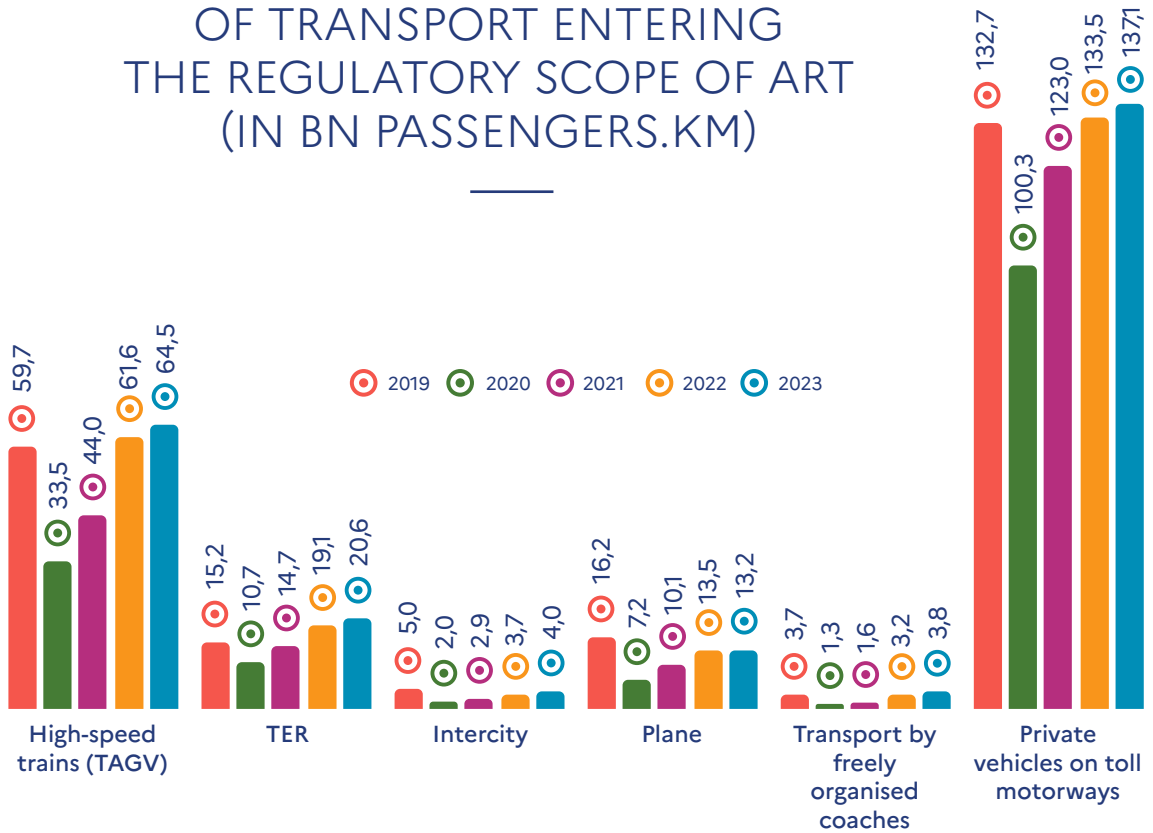


➤ Railway
 ➤ Road
 ➤ River

Note: to make a simple comparison between the different modes of transport. Each trip is counted by the distance travelled, so a passenger.km or a tonne.km represents the journey of one kilometre travelled by a passenger or by a tonne of goods. This makes it possible to take into account the importance of the journey (kilometres travelled, or even greenhouse gas emissions), which is not possible by simply counting the number of journeys made.

Source: Data and Statistical Studies Department (SDES) of the Ministry of Ecological Transition and Territorial Cohesion and ART for rail.

DETAILS OF THE USE OF TRANSPORT ENTERING THE REGULATORY SCOPE OF ART (IN BN PASSENGERS.KM)



TRANSPORTATION & EMISSIONS OF GREENHOUSE GAS (GHG)



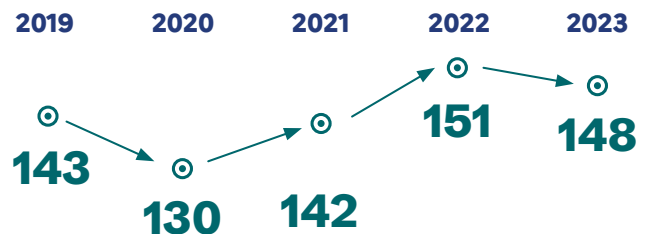
Weight of the transport sector

in total domestic greenhouse gas emissions in 2023:

33 %

Greenhouse gas emissions

from the transport sector (passenger and freight) (in Mt eqCO₂)



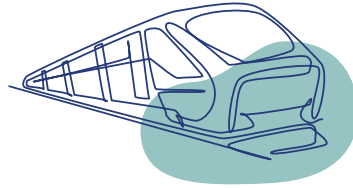
Notes: The emissions indicated take into account emissions from French road, rail, river freight, domestic maritime, other navigation, and French air transport. They are calculated on the 'well-to-wheels' perimeter, which includes the emissions generated during the upstream phase (production and distribution of the various fuels and energy sources).

To make a simple comparison between the different modes of transport, in particular those falling within the scope of ART, each trip is counted by the distance travelled. Thus, a passenger.km or a tonne.km represents the journey of one kilometre travelled by a passenger or by a tonne of goods. This makes it possible to take into account the importance of the journey (kilometres travelled, or even greenhouse gas emissions), which is not possible by simply counting the number of journeys.

Source: ART according to ADEME – Base Footprint (emission factors), SDES (traffic volumes and use of road modes, railway undertakings for trains), DGAC (emissions from domestic flights in mainland France), Citepa, April 2024, Setcen format inventory for other modes.

GREENHOUSE GAS EMISSIONS

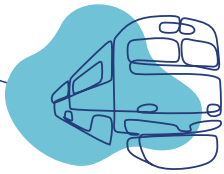
in France



640
million kg eqCO₂

emitted for rail passenger transport activity*

or 6.0 g eqCO₂ per passenger.km*,
estimated average emissions of 1 km per passenger



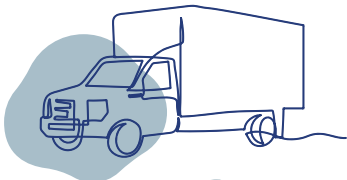
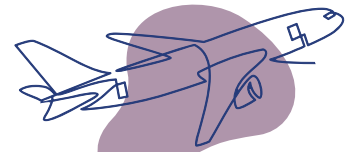
54
million kg eqCO₂

emitted for metros and RER managed by RATP,

an average of 4 g eq CO₂ per passenger.km*

2.0
billion kg eqCO₂
(in 2023)

for domestic flights in mainland France,
i.e., 145 g eqCO₂ per passenger.km



13
billion kg eqCO₂

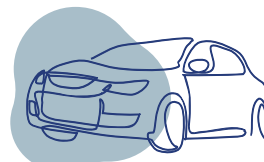
emitted for heavy goods vehicles on the motorway concession network,

an average of 118 g eqCO₂ per tonne.km*



86
million kg eqCO₂*

or 24 g eqCO₂ per passenger.km*

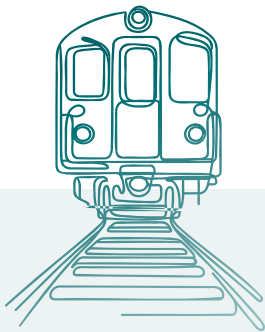


16
billion kg eqCO₂

emitted for private vehicles on the motorway concession network,

i.e., 113 g per passenger.km*

INFRASTRUCTURE & FACILITIES



48.828 km

of tracks*
(2nd European network)



2 800
passenger
stations

(regularly served²⁰²³)



285
facilities
served

including 73 coach stations*

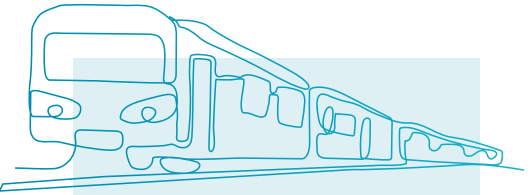


Nearly
12.000 km

of motorway
network
in France,

including more than
9.200 km of motorway
concessions.

Concession motorways
represent 1% of road
infrastructure in France,
but absorb more than 17%
of total traffic
(passengers and goods)



225 km
of metro
network

123 km
of RER lines
managed by RATP*

304
metro
stations*

64
RER stations
managed by RATP*

68
stations
for the future public
transport network of
the Grand Paris Express*

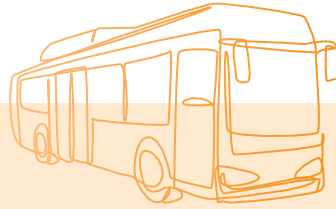
* Figures for 2023, as the figures for 2024 are not yet known at the date of publication of this report.

MOBILITY STAKEHOLDERS

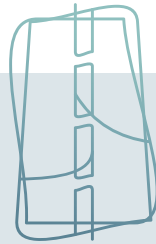


4
railway
undertakings
providing
passenger
services*

21
railway
undertakings
providing
freight services
(transport of goods)*

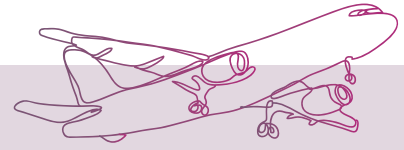


10
operators
including 2 active
nationwide
(BlaBlaCar et Flixbus)*



20
motorway
concessionaires
that manage:

78 %
of the national
motorway network,
including
94 %
of which is managed by
the three main groups
of motorway concession
companies²

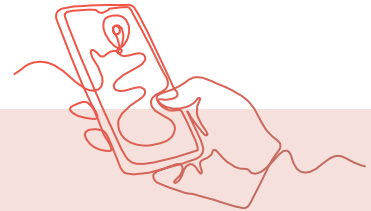


9
regulated
airport
operators

representing:

85 %
of commercial air passenger
transport (in number of
passengers)

94 %
of commercial air cargo
transport (in tonnes of cargo)



74
public information
services³



34
private information
services⁴



Citymapper



ComparaBUS

² Sources: Directorate-General for Infrastructure, Transport and Mobility and the General Commissioner for Sustainable Development and ART report on the summary of the accounts of concessionary companies 2023.

^{3 & 4} Source: PASSIM CEREMA.

* Figures for 2023, as the figures for 2024 are not yet known at the date of publication of this report.

| PATRONAGE



102 bn
passengers.km

(on the national rail network,
excluding RER managed by RATP)*



29 bn
tonnes.km
transported*

including
40 %
combined transport*



2.7 bn
passengers.km
(on domestic routes)*



5,6 bn
passengers.km
for RER
(managed by RATP)*



7 bn
passengers.km
for the metro*

* Figures for 2023, as the figures for 2024 are not yet known at the date of publication of this report.

AN ACTIVE YEAR AT THE SERVICE OF USERS & MOBILITY

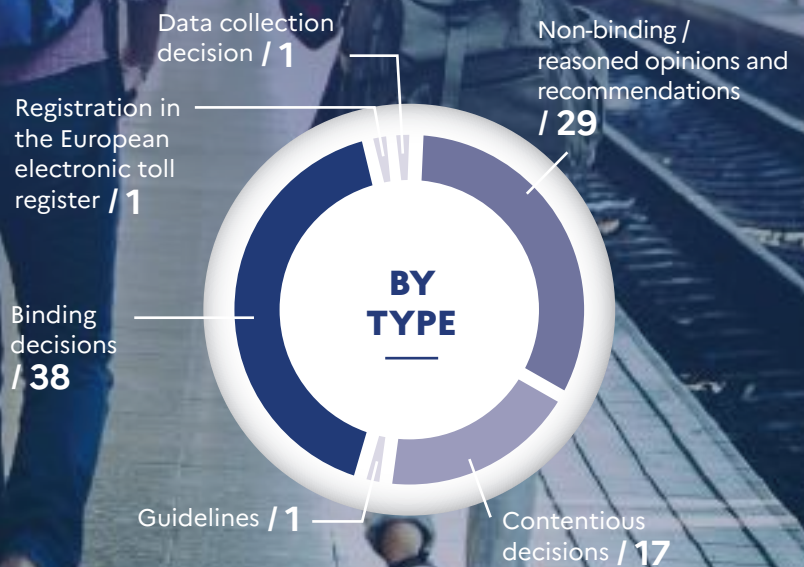
Opinions, decisions, reports and studies, board sessions, hearings, public consultations, litigation: 2024 was a particularly active year for ART, whose board and agents work daily to develop sustainable mobility in the six transport sectors falling within its competence.

| ART IN ACTION!

16 REPORTS & STUDIES



87 OPINIONS & DECISIONS



- ▶ Multisectoral
- ▶ Motorway
- ▶ Railway
- ▶ Road passenger transport
- ▶ Airport
- ▶ Digital mobility data and services
- ▶ Urban public transport in the Île-de-France region



| INTENSE ACTIVITY



3

**public
consultations**



41

**hearings
by the ART
board**



45

**board
sessions**

| EXTENSIVE LITIGATION ACTIVITY

This is divided into three main categories:

Decisions made by the regulator within the framework of its quasi-jurisdictional functions (dispute settlements and infringement procedures):

- ◆ 11 dispute settlement decisions;
- ◆ 1 formal notice decision;
- ◆ 1 decision to close infringement proceedings.

Appeals lodged by the parties before the courts against a decision of ART:

- ◆ 1 decision of the Council of State rejecting the appeal against the assent of ART No. 2023-008 of 9 February 2023 on the setting of charges for the use of the national rail network infrastructure for the 2024 to 2026 service schedules;
- ◆ 1 judgment of the Court of Cassation annulling ART's decision No. 2021-016 of 11 February 2021 relating to the dispute between the Nouvelle-Aquitaine region and SNCF Gares & Connexions.

Appeals lodged against a decision of a third party, in which ART was a party or respondent:

- ◆ 1 decision of the Council of State annulling the pricing provisions of the reference document of the national rail network for the 2024 service schedule established by SNCF Réseau;
- ◆ 1 decision of the Council of State rejecting the appeal against certain provisions of the specifications annexed to the agreement entered into between the State and Autoroutes du Sud de la France (ASF) for the concession of the construction, maintenance and operation of motorways in its version amended by its nineteenth amendment and Decree No. 2022-1303 of 10 October 2022 approving this nineteenth amendment.



MEASURING THE PERFORMANCE OF ART'S ACTION

Through its opinions, decisions and reports, ART contributes to improving the operation of the transport sector and to building sustainable mobility. Committed to carrying out useful action for the sector, in 2024, for the second year in a row¹, it carried out a review of the implementation of its requests, recommendations, injunctions and reminders of the law. Only the road passenger transport by coach sector, which did not give rise to requests to the sector, is excluded from the analysis.

| RAIL SECTOR

The implementation of ART's recommendations is well underway but must be continued, in particular on the operational side and with regard to service facilities.



75
recommendations



46
requests



1
injunction

were formulated by ART between 1 April 2023
and 31 March 2024 as part of 16 opinions and decisions.





In its 2023 activity report, ART noted that of the 186 requests made during the previous year, 150 had not yet been implemented². In addition to the new requests made (122), the 272 ART requests are mainly aimed at:

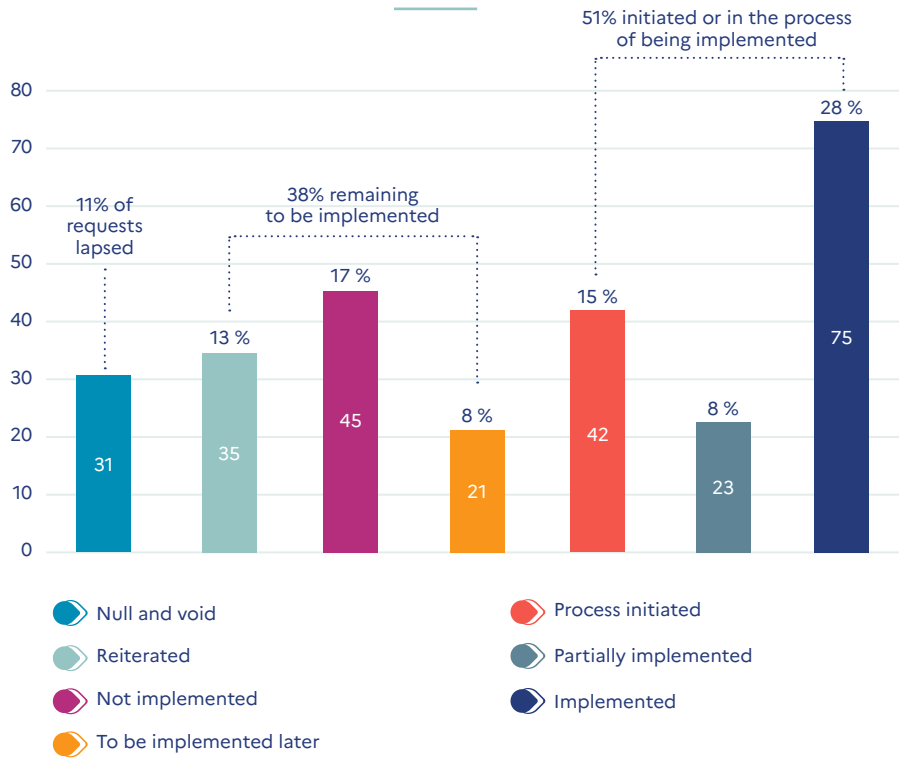
- ◆ working towards efficient pricing of railway infrastructure and essential facilities, in particular by furthering the link between price changes and quality of service, by aiming to control the level of prices through incentives for the efficiency of infrastructure managers, and by working to improve the price signal through refined cost allocations (45% of requests);
- ◆ improving the transparency of the technical conditions of access to railway infrastructure and continuing to remove barriers to market entry to encourage the arrival of new entrants (27% of requests);
- ◆ implementing more incentive-based regulation to improve the quality of service offered by essential infrastructure managers, and thus contributing to quality railway infrastructure (28% of requests).

¹ Unless otherwise specified, the assessment was carried out at the end of 2024 and covers all requests issued between 1 April 2023 and 31 March 2024, to which were added all those previously formulated and which still had to be implemented.

² The assessment carried out at the end of 2024 took into account the recommendations and injunctions made before 31 March 2023.

The first recipient of ART's requests was SNCF Réseau, the main infrastructure manager and operator of service facilities in France, to which 155 of the 272 requests were addressed.

Status of requests made by ART in the rail sector³



ART notes that the implementation of its recommendations is well underway, with more than half (51%) of its requests having been implemented or for which a process has been initiated. ART's action has made it possible, in particular, to improve the readability of offers of access to service facilities, or the implementation, by SNCF Réseau, of actions to improve the capacity allocation process and, more generally, the quality of the service provided to its customers.

On the other hand, ART observes that 38% of its requests still have to be implemented, of which 17% have not been implemented within the scheduled deadlines:

- on-board safety equipment (14 recommendations addressed, for the most part, to the Ministry of Transport in the July 2022 study, On-Board Safety Equipment, at the time of opening up to competition);
- the pricing and quality of service of the service provisions offered by SNCF Réseau in the service facilities it operates (8 requests).



³ Note: in its decision No. 472859 of 5 March 2024, the Council of State annulled the pricing provisions of the network reference document for the 2024 service schedule of SNCF Réseau. This decision resulted in the lapse of 25 requests issued by ART. These were reiterated by ART in its opinion of 5 September 2024 and will be followed up as part of ART's next activity report.

DID YOU KNOW?

ART has investigative powers to look for and record breaches of their obligations by regulated stakeholders.

In response to a report or on its own initiative, ART may decide to open a procedure for the investigation and establishment of breaches (PRCM) thereby utilising the investigative powers entrusted to it by the legislator.

If no breach is identified by ART's services, the board may decide to close the procedure. By way of illustration, in February 2024, the ART board opened a PRCM against SNCF Réseau, ordering it to put in place a mechanism penalising the non-use of unreturned work capacities. SNCF Réseau then complied, and the ART board decided to close this procedure.

Otherwise, if a breach has been established, the ART board may decide to give formal notice to the offender to put an end to the breach. If the breach persists, the matter may be referred to ART's Sanctions Committee, an independent body of the board. Thus, in 2023, ART's Sanctions Committee, sitting for the first time, imposed a fine of two million euros on SNCF Réseau for failing to comply with its obligations relating to the operational conditions of access to the railway infrastructure.

URBAN PUBLIC TRANSPORT SECTOR IN ÎLE-DE-FRANCE

Although the implementation of its requests is satisfactory, ART will remain attentive to the continuation of the work undertaken by RATP as part of its activity as infrastructure manager of the historic network.



5

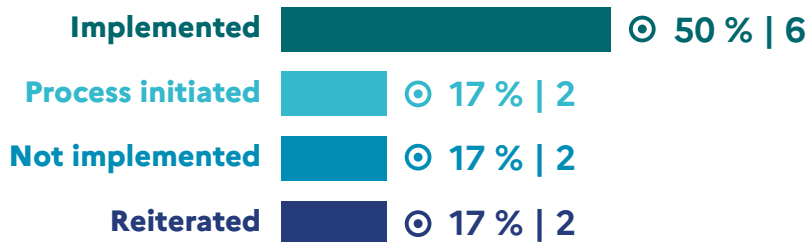
recommendations

were made by ART
between 1 April 2023
and 31 March 2024.

In its 2023 activity report, ART noted that 7 requests had not yet been implemented⁴. In addition to the new requests made since then, the 12 ART requests mainly concern:

- the infrastructure of the Grand Paris transport network (whose technical manager is RATP) for which it is in particular essential to clarify the information transmitted to transport operators in the context of competitive tendering procedures on the Grand Paris network (4 requests);
- the security services provided by RATP's internal security service, whose method of setting prices needs to be improved, in particular to base prices on those offered by a reference operator considered to be 'efficient' (4 requests).

Follow-up of requests made by ART in the urban public transport sector in Île-de-France



ART notes that the implementation of its requests is well underway, with 70% having been implemented or initiated.

In terms of operational conditions of access to the Grand Paris network, initial progress can be observed. ART's action has made it possible, in particular, to improve the management of confidential information relating to operators of transport services in the Grand Paris network

other than RATP, of which RATP is aware as part of its activity as technical infrastructure manager.

In terms of security services, ART will ensure that regulated prices are set within the nominal schedule provided for in the documents, and as soon as possible on a multi-year basis, so as to strengthen predictability for the stakeholders who may use them.

⁴ The assessment carried out at the end of 2024 took into account the recommendations and injunctions made before 31 March 2023.

| AIRPORT SECTOR

Although the implementation of its requests is satisfactory, ART remains attentive to the steps initiated, in anticipation of the end of the transitional period relating to the allocation of assets, costs and charges between regulated and non-regulated perimeters.



12

requests



9

recommendations

were formulated by ART as part of nine decisions addressed to regulated airports during the penultimate approval decisions⁵.

ART must ensure that:

- ◆ users are duly consulted on pricing proposals;
- ◆ the charges themselves are transparent and non-discriminatory;
- ◆ expenses and assets are properly allocated between, in particular, activities relating to the airport public service and commercial activities.

ART notes that the implementation of its requests is satisfactory. As part of its approval decisions, ART found that 86% of the requests made in its penultimate decisions had been fully or partially implemented (a process had

been initiated) or that they had lapsed. It has reiterated 14% of its requests and will monitor their implementation in the next approval decisions.

⁵ With regard to the legal framework and the operational functioning of airport regulation, the time frame considered differs from other sectors: the assessment is carried out after a complete annual approval cycle, i.e., by examining during referral N (until 31 December 2024) the implementation of the requests formulated in the penultimate decisions of ART (N-1).



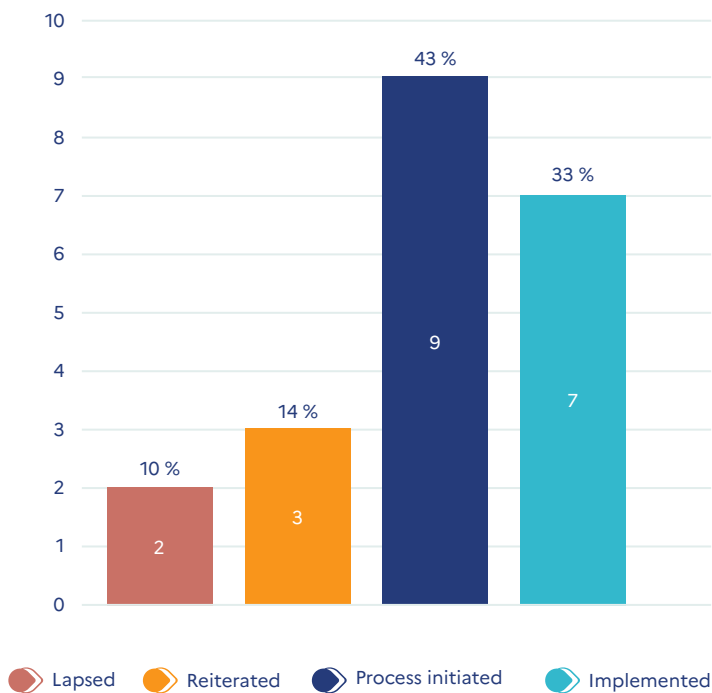
In response to ART's recommendations to hold specific cycles of meetings and exchanges with airlines, Aéroports de Paris (Paris Airports – ADP) has set up a working group dedicated to investments, including information to help users better understand the plans envisaged. Basel-Mulhouse EuroAirport (EAP) provided a detailed analysis of runway wear based on aircraft technical data, in accordance with the previous recommendations of ART. Bordeaux-Mérignac Airport (ADBM) organised discussions to adapt the rules, clarify the methodologies, and provide detailed analyses concerning the accounting allocation rules.

The steps initiated mainly concern the work in progress during the transitional period relating to compliance with the rules for the allocation of assets, income and expenses, which will end on 31 December 2025.

ART reiterated certain requests to ADP concerning the iterative exchange with users on the accounting allocation, insisting on the need for a direct and transparent dialogue as well as the establishment of financial incentive mechanisms to improve the quality of service.



ART notes that the implementation of its requests is satisfactory.



FOCUS

The finalisation of the work relating to the adaptation of the accounting allocation rules for airport operators at the end of the transitional period.

As part of the annual approvals, ART requires airport operators to draw up a precise and binding work programme with users, in order to ensure the correct progress of the work to guarantee compliance with the allocation rules, at the end of the transitional period, by 31 December 2025 at the latest.

Following two public consultations, ART adopted two decisions on allocation rules in 2022. Decision No. 2022-024 establishes eight principles to which these rules of assets, income and expenses must comply, namely (i) auditability, (ii) homogeneity, (iii) non-discrimination, (iv) relevance, (v) priority to direct allocation, (vi) reconciliation and traceability, (vii) stability over time, and (viii) transparency. Decision No. 2022-025 complements it by providing guidelines for the interpretation and implementation of these principles and by establishing a transitional period until 31 December 2025 to allow operators to comply with the principles.

As part of the decisions it makes, ART ensures that the steps are well initiated in anticipation of the end of the transitional period, and issues alerts on the work that must be carried out, with a view to establishing compliance of the allocation rules with the principles it has established.

As an example, for Basel-Mulhouse EuroAirport (EAP), ART encouraged the establishment of a working group with users and the continuation of adjustment work until the end of 2025. For Aéroports de la Côte d'Azur (ACA), it insisted on better sharing of information concerning the allocation rules, in particular, for new investments, and suggested validation by an external auditor. With regard to Aéroports de Paris (ADP), it asked for the studies to be updated, which underpin in particular the justifications for the changes in allocations for common areas and access infrastructures leading to the airport.





| MOTORWAY SECTOR

Most of the recommendations made by ART are in the process of being implemented.

Schematically, these recommendations have three objectives.



14
recommendations

were formulated by ART during 2023 and the beginning of 2024 (until 31 March 2024), as part of its opinions and reports, for the benefit of the concession holder or the motorway concessionaires (SCAs).

FIRST OBJECTIVE

To improve the conditions for awarding sub-concession contracts for the operation of service areas, in order to moderate the price of fuel.

The general observation is as follows: although the systematic competitive tendering of these contracts makes it possible to lower pump prices, there is still room for improvement. This is the subject of 5 recommendations, most of which are in the process of being implemented. In 2025, changes in concessionaire practices – particularly with regard to the amount of penalties imposed on sub-concessionaires in the event of excessive prices – as well as changes in the regulatory framework – which will cap the fees paid by sub-concessionaires to SCAs – will contribute to the moderation of prices charged at service areas.



SECOND OBJECTIVE

To enable effective competition for SCA contracts.

In the report published in 2023 on the contracts awarded by SCAs, ART highlighted several practices that need to be improved. Firstly, the internal control procedures of SCAs are not always sufficiently strict with regard to the structuring of purchases. It thus happens that contracts relating to the same operation are awarded by different buyers, without the corresponding amount being accumulated to check whether the competitive tendering

threshold has been reached. Secondly, the amount of amendments made by the SCAs is sometimes high in relation to the initial amount of the contract, and the reasons justifying the modification of the contract during its execution are often insufficiently substantiated. These two recommendations have been followed up: ART has found that concessionaires have changed their practices on these points and that SCA's procurement procedures are now more robust.

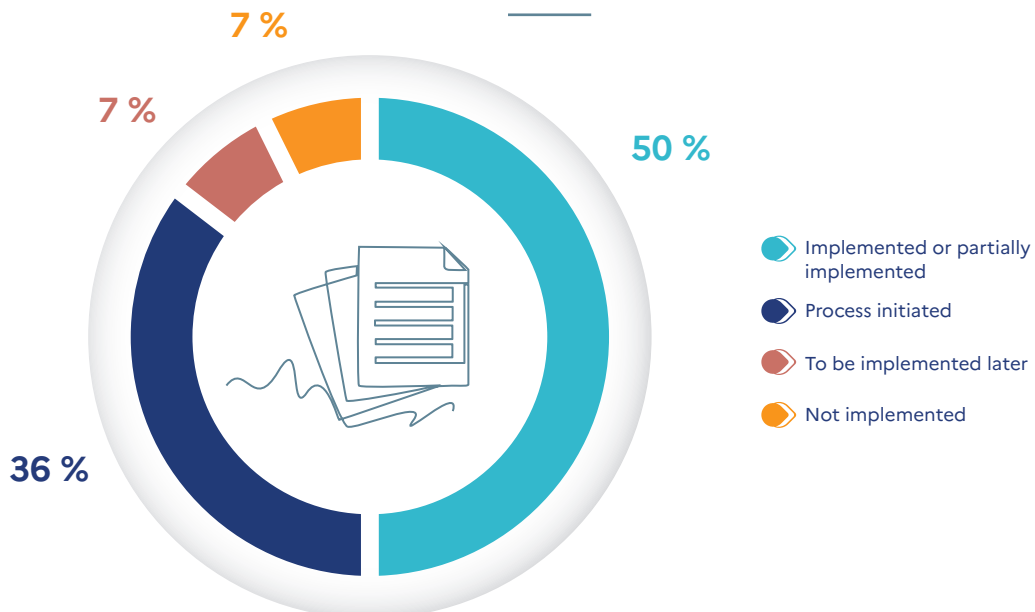
THIRD OBJECTIVE

To prepare for the end of concessions and anticipate future methods of managing the motorway network.

Given the forthcoming expiry of the historic concessions, this point is one of the main areas of ART's work on concession economics. The 2023 publications, in particular, the focus on the profitability of concessions and the sharing of risks in a public service delegation, enabled ART to formulate priorities: it considers that the

two essential projects relate to the good condition at the end of the concession and the inventory of investments due by the concessionaires. The implementation of these recommendations is largely underway at the end of 2024, in particular thanks to significant work carried out in conjunction with the concession holder.

Status of recommendations made by ART



DIGITAL SERVICES & MOBILITY DATA SECTOR

In 2023–2024, ART contributed to the open data provision of nearly a third of new mobility datasets.



106

reminders of the law

were sent by ART during its second control campaign, which took place from November 2023 to September 2024, to the various data holders, in particular, managers of regular transport services such as mobility organising authorities or their delegates, airlines or railway undertakings, as well as on-demand transport managers. These reminders of the law concerned failures to publish or update static, dynamic, self-service or car-sharing data to be published on the Point d'Accès National (National Access Point – PAN) <https://transport.data.gouv.fr>.

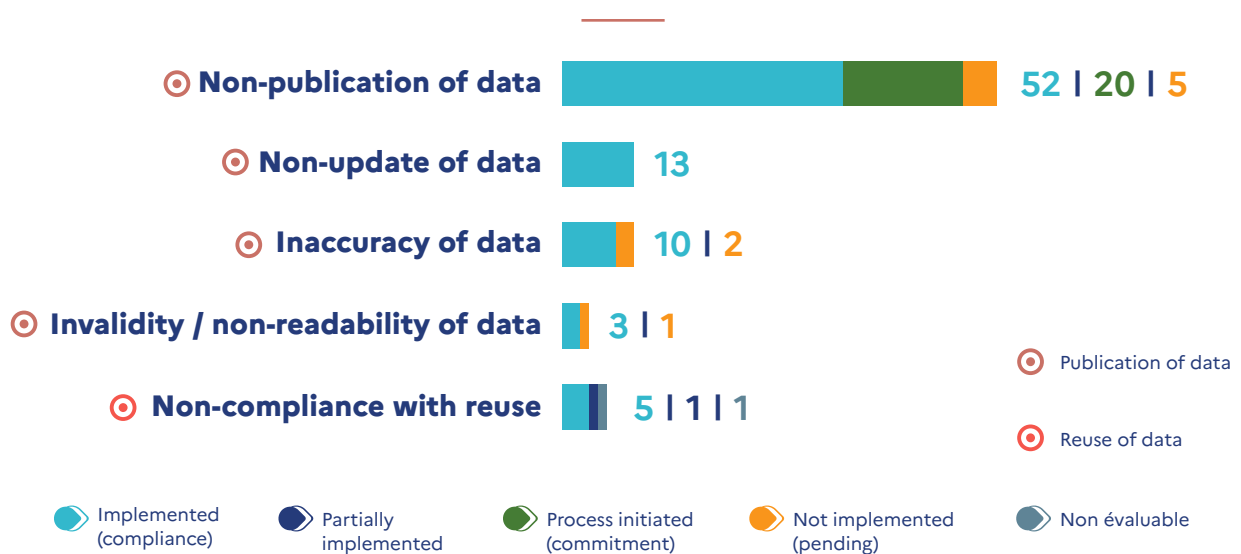
ART also issued reminders of the law to various re-users of mobility data. As with their publication, the reuse of PAN data (aimed at informing travellers about the mobility offer in their territory) is subject to several obligations: neutral, transparent use and display, without bias or discrimination. The 2023–2024 control campaign, based on the objectives defined by the ART board, focused specifically on the transparency of the ranking criteria for route calculators. Out of a total of 27 route calculators checked, 7 of them, which were likely to be non-compliant, were thus the subject of reminders of the law.



Note: The designation 'not assessable' refers to reminders of the law to be implemented or assessed in a future referral or at a later date. In order to avoid double counting, the first letters which would have been followed by a second reminder are not counted here.



Status of the 113 reminders of the law issued during the second ART control campaign and assessed as at 31 December 2024



ART's action has contributed to a significant improvement in the publication rates of mobility data: 36% of the new data published in 2024 on the National Access Point was published thanks to the controls carried out by ART.

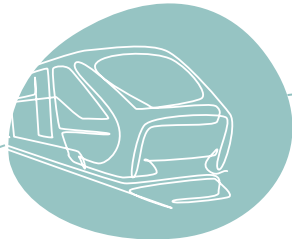


DID YOU KNOW?

The scope of regulation is expanding as the sector develops.

The Loi d'Orientation des Mobilités (Mobility Orientation Law – LOM) has allowed for an expansion, from 2021, of the powers of communities of municipalities as new mobility organising authorities (AOMs), a power taken on by nearly 400 new stakeholders (the equivalent of a doubling of the 335 local AOMs existing before 2021). The gradual implementation of new mobility services by some of these new stakeholders, and the production, where appropriate, of new static or even dynamic associated datasets, will lead to a gradual expansion of the stakeholder base covered by the obligation to publish this data, which is what the controls carried out by ART are focusing on.

IN SUMMARY



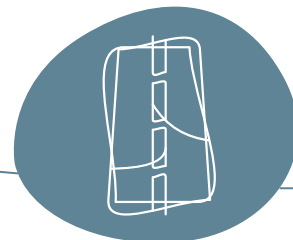
The implementation of ART's recommendations is well underway but must be continued, in particular on the operational side and with regard to service facilities.



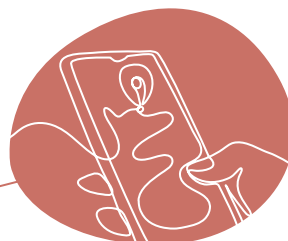
Satisfactory implementation of the requests that accompany the beginnings of the sector's opening up to competition.



Satisfactory implementations, but particular attention must be paid to the steps initiated, in anticipation of the end of the transitional period relating to the allocation of assets, income and expenses.



Most of the recommendations made by ART are in the process of being implemented, some of which have already been followed up.



More than a third of the data published on the national access point in 2024 was published following the ART control campaign.

A YEAR MARKED BY THE EVOLUTION OF ART'S COMPETENCIES

THE MAIN STAGES IN THE EXPANSION OF ART'S COMPETENCIES

Created in 2009 to support the opening up of the rail transport market to competition, ART has seen its scope of action considerably expanded to cover six regulatory sectors today: rail, major airports, coaches, motorway concessions, urban public transport in the Île-de-France region, and digital mobility data and services.

RAIL SECTOR

2010



2014

2015

2018

- Support for the opening up of the rail sector to competition by creating the conditions for this opening and by ensuring free, transparent and non-discriminatory access to essential infrastructure (network, stations, etc.), in application of European texts ('railway packages').

Law No. 2009-1503 of 8 December 2009 on the organisation and regulation of rail transport and on various provisions relating to transport.

- Extension of opinions on the pricing of all service facilities.
- Opinion on the draft performance contract between the State and SNCF Réseau and its updates, monitoring of the implementation and compliance with the financial trajectory of the infrastructure manager, and monitoring of the financing conditions of its investment projects.

Law No. 2014-872 of 4 August 2014 on railway reform.

- Extension of competencies to the economic regulation of the Channel Tunnel, jointly with the Office of Rail & Road (ORR), in accordance with European Directive 2012/34/EU.

Binational Regulation of 18 and 23 March 2015.

- Strengthening of the powers of opinion, dispute settlement and sanction with a view to opening up rail passenger transport services in France to competition.

Law No. 2018-515 of 27 June 2018 for a new railway pact.

ROAD PASSENGER TRANSPORT



2015

MOTORWAY SECTOR

2015



2022

- Regulatory assignment for collective road passenger transport: independently run private coach transport for interurban connections of less than one hundred kilometres, access to coach stations and road transport facilities, market observation.

(Law No. 2015-990 of 6 August 2015 for growth, activity and equal economic opportunities).

- Assignment to regulate and control the motorways granted by the regulator, in particular to compensate for the asymmetry of means between the concessionary companies and the concession holder.

Law No. 2015-990 of 6 August 2015 for growth, activity and equal economic opportunities.

- Assignment in the European Electronic Toll Service (registration of providers, maintenance of the register, conciliation between providers and toll collectors).

Law No. 2021-1308 of 8 October 2021 on various provisions for adaptation to European Union law (DDADUE).

AIRPORT SECTOR

2019

- Resumption of competencies – by expanding – of the Independent Supervisory Authority resulting from the European Directive 2009/12/EC.
- Annual approval of airport charges at the largest French airports.
- Reasoned opinion on the weighted average cost of capital (WACC) to be retained and given assent.

Order No. 2019-761 of 24 July 2019 relating to the airport charges regulator.

2022

- Economic and financial monitoring assignment for airports within ART's area of competency.
- Power to determine the principles governing the accounting allocation rules (assets, income, expenses) of regulated and unregulated activities.

Law No. 2021-1308 of 8 October 2021 on various provisions for adaptation to European Union law (DDADUE).

2024

- Reasoned opinion on the preliminary drafts of the economic regulation contract.

Law No. 2024-364 of 22 April 2024 on various provisions for adaptation to European Union law (DDADUE).

2025

- Reasoned opinion on the specifications of the concession of an aerodrome under the jurisdiction of the State.
- ART's assent to the continued execution of the economic regulation contract beyond five years.
- Non-binding opinion on draft regulatory texts relating to the airport regulation.

Law No. 2025-391 of 30 April 2025 on various provisions for adaptation to European Union law (DDADUE).

URBAN PUBLIC TRANSPORT IN THE ÎLE-DE-FRANCE REGION

2020

- Regulation of the activities of RATP's infrastructure manager on the historic metro and RER network and of the technical manager of the Grand Paris Express network, as well as the security services offered by the network protection and security group (GPSR).

Law No. 2019-1428 of 24 December 2019 on mobility orientation (LOM).

MOBILITY DIGITAL SERVICES SECTOR

2020

- Assignment on the control of the opening and reuse of mobility data and ticketing in order to ensure, among other things, the control of compliance with the provisions of the European Regulation of 31 May 2017 on the provision of multimodal travel information services.

Law No. 2019-1428 of 24 December 2019 on mobility orientation (LOM).

2025

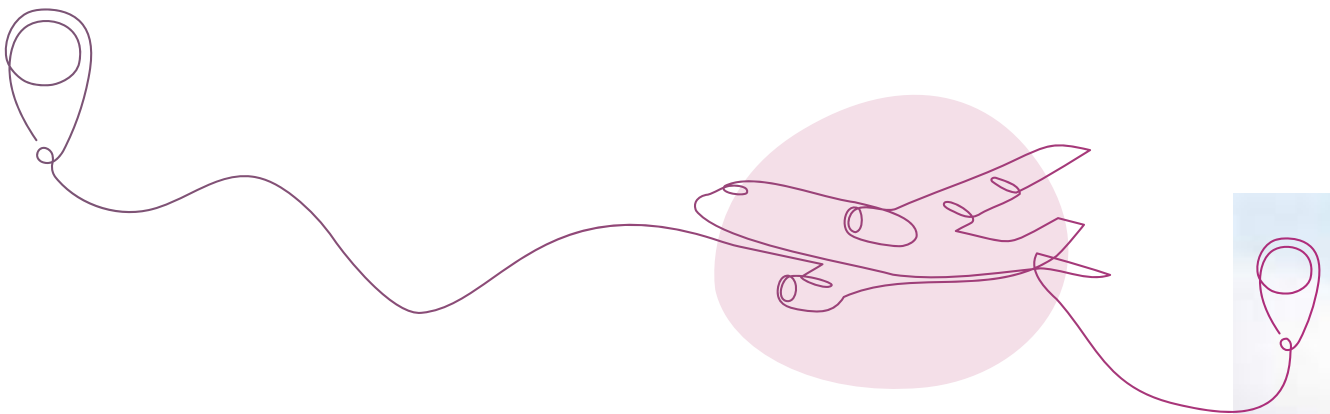
- Control assignments relating to compliance with the obligations of access to digital road data by data holders and users.
- Non-binding opinion on draft regulatory texts relating to the publication and use of digital data necessary for passenger information.

Law No. 2025-391 of 30 April 2025 on various provisions for adaptation to European Union law (DDADUE).

Note: the dates indicated are those of the effective acquisition of competency by ART.

A YEAR MARKED BY THE STRENGTHENING OF ART'S COMPETENCIES

In 2024, the French legislator changed the competencies of ART in the airport sector in order to consolidate its role and allow it to intervene effectively in the discharge of its assignments.



ART'S ASSESSMENT OF THE MODERATE NATURE OF THE AVERAGE PRICE CHANGE OVER THE DURATION OF THE ECONOMIC REGULATION CONTRACT

In 2019, the legislator entrusted ART with assignments concerning airport charges. In particular, ART is empowered to give an assent to the Minister for Civil Aviation on the draft economic regulation contracts (CRE).

These multi-year contracts, entered into between aerodrome operators and the State, determine the terms of changes in airport charges, taking into account elements such as forecasts of costs, revenues and investments, as well as the quality objectives of the public services provided by the aerodrome operator.

They constitute a useful tool in the context of the industrial and environmental development of the aviation sector, and provide more visibility to airlines.

Law No. 2024-364 on various provisions for adaptation to European Union law in the fields of economics, finance, ecological transition, criminal law, social law and agriculture (DDADUE) specifies the scope of ART's intervention within the framework of its assent. ART must now assess the moderate nature of the average price change over the period covered by the contract, i.e., in view of the average growth rates proposed by the parties to the CRE.



INTRODUCTION OF A REASONED OPINION BY ART ON THE PRELIMINARY DRAFTS OF ECONOMIC REGULATION CONTRACTS

The DDADUE law, adopted in 2024, reinforced ART's intervention with regard to the CRE development process. The legislator wanted to allow the Minister for Civil Aviation to ask ART to give a reasoned opinion on the preliminary drafts of the CRE.

This reasoned opinion will thus enable the concession holder and other stakeholders to

benefit from the regulator's insight into the elements that make up the economic balance of the future CRE, to give the necessary visibility to the parties on all the economic parameters appearing in the contract and, finally, to ensure that the file submitted to ART for assent at the end of the process can be approved, in order to guarantee the efficiency and fluidity of the system.



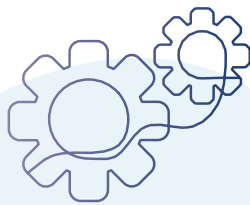


REVIEW OF ART'S ACTION IN 2024 WITH REGARD TO MOBILITY ISSUES

The scope of ART's intervention is precisely defined by law. However, in each of the six transport sectors under its competence, the economic regulator carries out its assignments by dealing with broader issues closely linked to the specific expectations of users in terms of mobility.

With regard to the economic regulation assignments entrusted to it, ART contributes more specifically to:

- the control of prices paid by users and, therefore, the preservation of the purchasing power of the French and the competitiveness of businesses, in the inflationary context observed since 2022;
- the quality of transport and infrastructure services;
- the decarbonisation of transport and the ecological transition, as global warming is an imperative that requires the mobilisation of all.



How did the transport economic regulator contribute to these issues in 2024?

In the rail, airport and urban public transport sectors in Île-de-France, ART is an economic regulator that does not directly intervene in the price of transport tickets paid by users. It operates in the so-called 'upstream' markets, mainly to regulate the prices for access to essential infrastructures and services paid by operators to offer their services: ART thus regulates the charges paid by airlines to airport operators, those paid by railway undertakings to the managers of the national rail network and passenger stations, or the prices for security services provided by SNCF's internal security services (SUGE) and RATP (GPSR). In the rail sector, where ART has the broadest powers, its action also aims at the proper competitive functioning of the so-called 'downstream' markets in order to promote the control of their costs by railway undertakings and lower their prices, for the benefit of end customers, by identifying and removing barriers to the entry of new stakeholders.

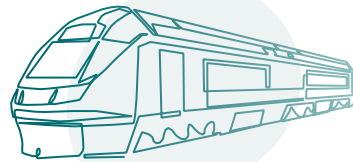
More specifically, a number of ART's achievements in 2024 contributed to the control of fares and prices paid by transport users.

PRICE CONTROL, PRESERVATION OF PURCHASING POWER & COMPETITIVENESS

ART's action contributes directly or indirectly to the control of prices paid by transport users.

In the motorway concession sector, ART's opinions inform the concession-granting State and encourage it to negotiate the toll increases necessary to finance investments not provided for in the original contracts as fairly as possible with the motorway concession companies. In particular, ART ensures that the planned investments are not already provided for in the contracts, provides a second opinion on the costs of the planned developments, and verifies that the remuneration granted to the concessionaire complies with market conditions.

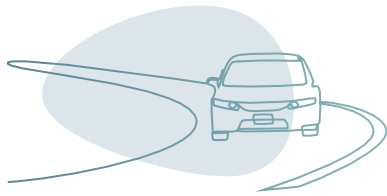
It also controls the procedures for awarding contracts by motorway concession companies for the operation of service areas, in particular by ensuring the moderation of fuel prices.



IN THE RAIL SECTOR, ART HAS IN PARTICULAR:

- **worked to improve the sustainability of infrastructure usage tolls**, in order to encourage the infrastructure manager to make more intensive and optimised use of the rail network;
- **encouraged operators who manage railway service facilities to be more efficient**, by encouraging optimal use of stations by means of relevant price signals, for example, by revising the allocation method between the regulated and unregulated perimeters of the station reference document;
- **helped to control the prices for access to other service facilities** by making recommendations to facility operators on the use of service routes or on the maintenance of rolling stock.





IN THE MOTORWAY CONCESSION SECTOR, ART HAS, IN PARTICULAR:

- **contributed to guaranteeing a fair price for tolls**, by recommending, for example, the provision of hourly rate modulations or the reduction of the initial duration of concession contracts relating to the A412 motorway between the municipalities of Machilly and Thonon-les-Bains;
- **enabled users to save 8 million euros thanks to the opinions it issued on the draft amendments to the sub-concession contracts for service areas** in order to ensure compliance with the criteria for moderating fuel prices;
- **prepared its third report on the general economy of concessions dedicated to the technical and financial challenges** posed by the end of the historic concessions, published in November 2024;
- **contributed to ensuring the exercise of effective competition in the contracts awarded by motorway concession companies**, which it reported on in its seventh annual report on the contracts awarded by motorway concession companies.



IN THE LIBERALISED COACHES SECTOR, ART HAS IN PARTICULAR:

- **controlled the rules of access to coach stations** to ensure that carriers access them under satisfactory conditions and at fair prices;
- **contributed to ensuring the exercise of effective competition** by monitoring the development of the sector's activity to ensure its proper functioning and development;
- **monitored the market and prices** to prevent excessive prices from being applied, in view of the duopoly situation in which Flixbus and Blablabus have found themselves since 2019;
- **supported the discussions relating to the closure of Bercy station**, by conducting a consultation with the stakeholders – local authorities and carriers – work on which the Prefect of Île-de-France relied to identify the replacement solutions to be put in place.



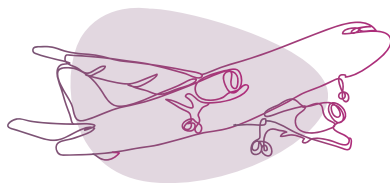
IN THE URBAN PUBLIC TRANSPORT SECTOR IN ÎLE-DE-FRANCE, ART HAS, IN PARTICULAR:

- **set the remuneration paid by Île-de-France Mobilités to RATP** for the years 2021, 2022, 2023 and 2024, for its activity as technical infrastructure manager of the Grand Paris public transport network;
- **examined the confidential information management plan of RATP's competing operators** for these same activities concerning Grand Paris;
- **ensured that the prices of security services at stations and on-board trains** are controlled for the year 2024 and will be established, in the long term, on a multi-year basis.



IN THE MOBILITY DATA AND DIGITAL SERVICES SECTOR, ART HAS:

- ◆ carried out a mobility data control campaign, pursuing in particular the objectives of a generalised opening of public transport data and an improvement in the quality of mobility data, which will allow passengers using transport to be better informed about the offers available, and to be able to compare these offers, in particular their prices;
- ◆ adopted close to a dozen decisions to settle disputes between mobility organising authorities – or their transport operator – and a digital platform, decisions that have made it possible to specify the rights and obligations of the various stakeholders set by the Mobility Orientation Law (2019).



IN THE AIRPORT SECTOR, ART HAS:

- ◆ rigorously pursued the fulfilling of its assignment of annual approval of airport charges, which led it to refuse price proposals when the price change was not moderate or the criterion of fair remuneration of invested capital was not respected, and to set the prices itself after several successive refusals of approval;
- ◆ worked on the establishment of a mechanism encouraging airport operators to be part of a multi-year regulatory framework through economic regulation contracts.



QUALITY OF SERVICE & TRANSPORT INFRASTRUCTURE

ART has contributed to the quality of the service offered by the managers of infrastructure essential to transport operators, so that they can provide services capable of meeting the requirements of users (rail network, stations, and other railway service facilities), or to the users themselves (motorway network in particular).

Similarly, by working for the successful opening up of rail passenger transport to competition and by promoting transparency in this area through its publications, it has also contributed to the quality of the service provided by railway undertakings to their users.

A number of ART's achievements contributed to the quality of transport services and infrastructures in 2024.

IN THE RAIL SECTOR, ART HAS IN PARTICULAR:

- ◆ **made recommendations for the next update of the performance contract** signed between the State and SNCF Réseau for the period 2021– 2030;
- ◆ **examined the financing trajectory of the rail network** and its consistency with the objectives set by the performance contract, inviting the infrastructure manager to reduce operating expenses and increase the expenses allocated to the regeneration and modernisation of the network;
- ◆ **examined the indicators relating to the quality of service** as part of the annual report of SNCF Réseau;
- ◆ **worked on the implementation of increasingly incentive-based regulation** to improve the quality of service provided in stations and access to SNCF Réseau's service facilities;
- ◆ **published, in its 2023 railway report, indicators relating to the quality of service** of rail passenger transport to contribute to regulation by data or 'sunshine regulation'.





IN THE MOTORWAY SECTOR, ART HAS:

- acted to improve the quality and restoration of the motorway infrastructure to a 'good condition' at the end of the historic contracts, ensuring that the contractual obligations of motorway concessionaires are complied with;
- contributed to preparing for the end of the historic concessions to best preserve the interests of tomorrow's users, by identifying the investments still to be made.

IN THE LIBERALISED COACHES SECTOR, ART HAS:

- continued its mission to improve the quality of service at coach stations by leading a consultation group bringing together market stakeholders. The objective was twofold: to establish standards for quality of service in stations while launching a consultation with the stakeholders.

IN THE MOBILITY DATA & DIGITAL SERVICES SECTOR, ART HAS:

- improved the quality of data publication through the control and support actions of stakeholders, thus offering better reuse of data by route calculators and therefore better dissemination of information. The route calculators were able to inform the traveller and adapt their route proposals according to the disruptions in progress;
- ensured the improvement of the quality and reliability of information for travellers by controlling the data to provide them with accurate and real-time information, while verifying that the classification of the offers made to travellers did not mislead them.



IN THE AIRPORT SECTOR, ART HAS:

- promoted dialogue between airlines and airport operators, in particular by ensuring that airport users are regularly consulted by the airport manager with regard to the quality of the service provided;
- worked on a change in the regulatory provisions to strengthen the intervention of users in the process of developing economic regulation contracts;
- contributed to a reflection on transparency and the consultation process of airlines, as part of the Thessaloniki Forum.



ECOLOGICAL TRANSITION & DECARBONISATION OF TRANSPORT

ART has contributed to the decarbonisation of transport and the ecological transition by supporting the development of modes of transport that emit less CO₂, namely public transport such as rail transport, urban public transport in Île-de-France, and liberalised coaches.

It also contributed to this objective by supporting green investments for the future in the motorway concession sector, and by monitoring the measures taken by airport operators in favour of the environment in its economic and financial monitoring report for the sector.

A number of achievements enabled ART to contribute to the ecological transition of transport in 2024.

IN THE RAIL SECTOR, ART HAS:

- ◆ **supported the entry of new stakeholders into the rail market**, in order to promote the development of this more environmentally friendly mode, in particular by formulating recommendations on the first framework agreements concluded by SNCF Réseau, as well as on strengthening the confidence of stakeholders in the independence of the infrastructure manager, as part of its study on the code of good conduct and the independence of SNCF Réseau, and by adopting guidelines relating to derogations from the principle of competitive allocation of these services;
- ◆ **supported the development of rail freight**, a key sector for the decarbonisation of transport, by formulating recommendations in favour of freight, in particular as part of the capacity allocation process.



IN THE MOTORWAY CONCESSION SECTOR, ART HAS:

- ◆ supported the deployment of electric charging stations on the motorway concession network through its control of the procedures for awarding contracts for the operation of service areas. In particular, it noted that the methods for rating offers did not provide sufficient incentives for moderating the price of recharges;
- ◆ identified possible investments to support the decarbonisation of the sector.

IN THE LIBERALISED COACHES SECTOR, ART HAS:

- ◆ highlighted the contribution of this sector to the decarbonisation of transport as part of its annual report on the coach transport market and on bus stations for the 2023 financial year.

IN THE URBAN PUBLIC TRANSPORT SECTOR IN ÎLE-DE-FRANCE, ART HAS:

- ◆ promoted the development of this mode of public transport, for the future, by examining RATP's confidential information management plan relating to its activity as technical manager of the Grand Paris public transport network, on which it gives an assent, and by formulating recommendations aimed at improving it.

IN THE AIRPORT SECTOR, ART HAS:

- ◆ monitored the measures taken by airport operators in favour of the environment as part of its economic and financial monitoring assignment.

IN THE MOBILITY DATA AND DIGITAL SERVICES SECTOR, ART HAS:

- ◆ promoted the use of lower-carbon transport services by supporting the development of digital mobility services and highlighting their potential impact on modal shift;
- ◆ accelerated the opening of low-carbon transport data, and in particular public transport, which is essential for services providing multimodal information to passengers.



FOCUS ON MULTIMODALITY

In its fourth multimodal report, ART examines the development of each mode of passenger and freight transport.

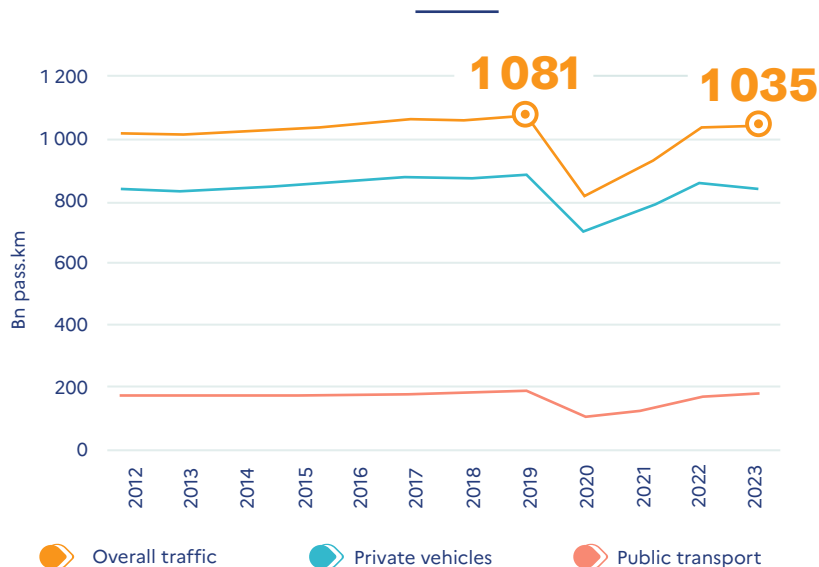
This development is mixed: while the share of public transport is increasing in a context of an overall slowdown in travel, rail transport remains attractive thanks to its price, despite a slightly deteriorated quality of service. At the same time, road freight transport is maintained due to its flexibility. This dynamic is reflected in a slight decrease in greenhouse gas emissions from inland transport, confirming a trend that began in previous years.

1ST OBSERVATION

The share of public transport increased in 2023, in a context of an overall slowdown in passenger travel.

In 2023, passenger transport in France fell for the first time in more than ten years (except for the COVID-19 crisis). The total distance travelled by all passengers represented 1,035 billion passenger-kilometre, compared to 1,081 in 2022, a decrease of 0.3%. This slight decrease is mainly the result of the decline in travel by private vehicles (-1.7%), while public transport increased by +6.3%.

Volume of domestic travel (in billions of passenger-kilometre)

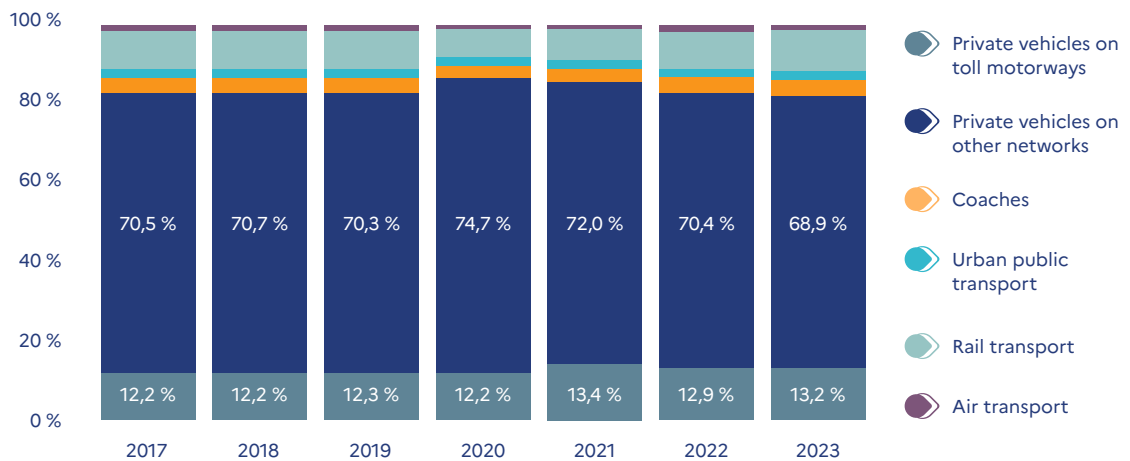


Sources: SDES (annual transport report in 2023) and ART for rail.

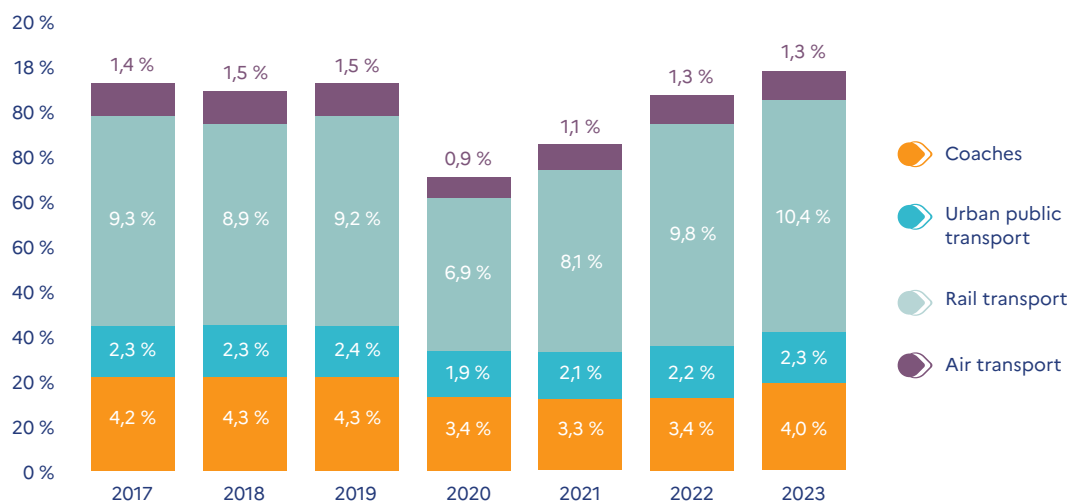
Methodological note: the distances considered are those travelled by French and international passengers on the mainland (including Corsica), with the exception of air transport, for which the analysis is limited to domestic flights within the mainland.

Public transport is experiencing an increase in its modal share, mainly driven by rail transport, to the detriment of the car. The share of public transport in overall domestic mobility increased by 1.1 percentage points between 2022 and 2023, of which 0.5 points in favour of rail transport, which thus represents a modal share of 10.4%.

Changes in the modal shares of domestic transport between 2017 and 2023



Focus on public transport modes

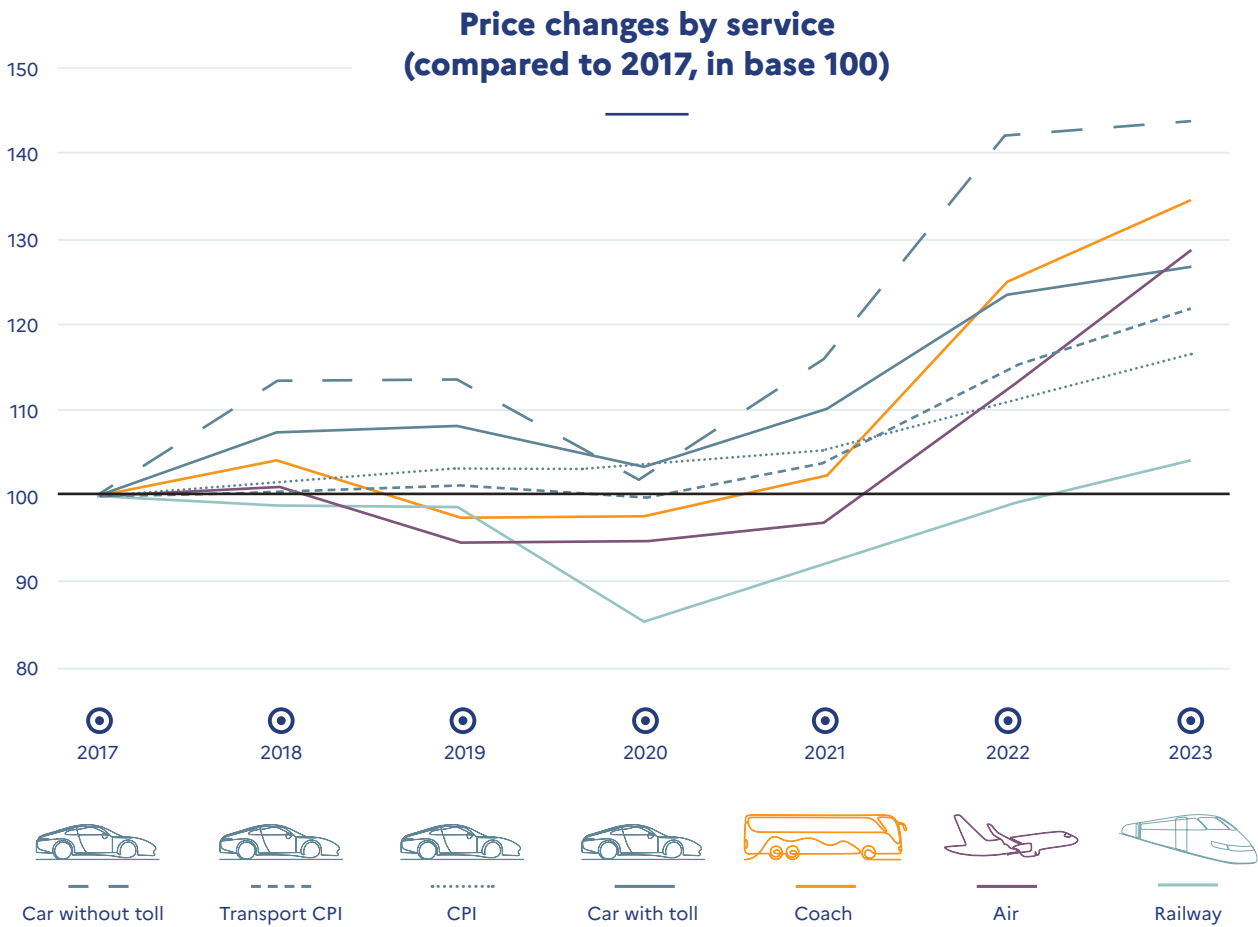


Sources: Data and Statistical Studies Department (SDES) of the Ministry of Ecological Transition (annual transport report in 2023) and ART for rail, motorway and liberalised coach transport.

| 2ND OBSERVATION

Price is one of the main factors in the popularity of rail transport, partly mitigating the effects of a deteriorated quality of service.

In a global inflationary context, the price of transport has undergone steep increases in recent years. Taking 2017 as the reference year, only rail transport prices have risen less than inflation. The prices of cars, coaches and air transport, which are highly dependent on the cost of fuel, have risen sharply since 2017 by +40%, +34% and +28% respectively.



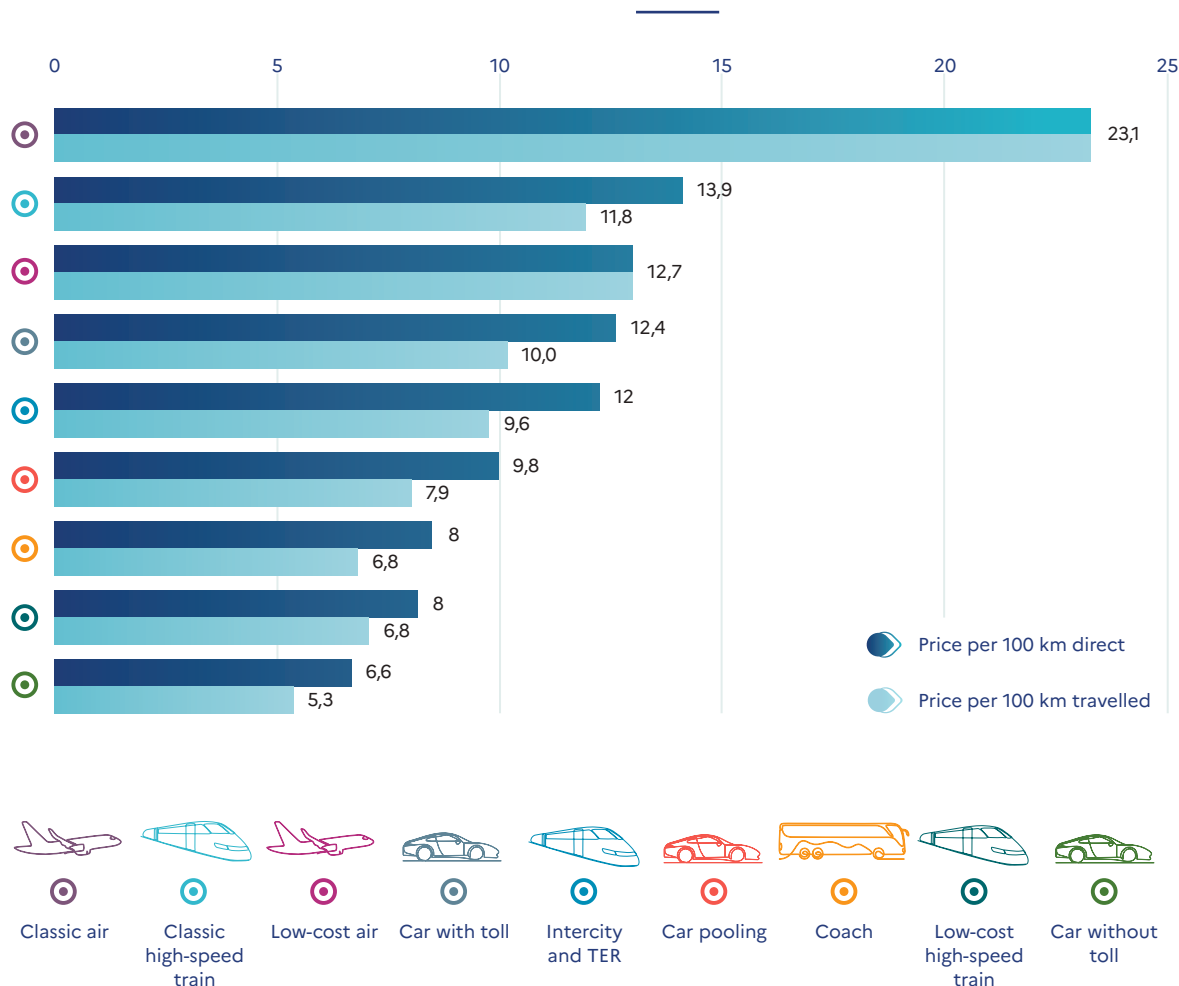
Although the price of transportation has increased faster than inflation for all modes since 2020, rail remains the exception, with low-cost services that guarantee a competitive alternative offer. In 2023, only low-cost high-speed trains (TAGV) had a price per kilometre almost as low as the car on a toll-free route: on average, low-cost TAGVs cost €8 per 100 km travelled (€6.8 per 100 km as the crow flies), compared to €6.6 (and €5.3) for the toll-free car.

CPI: Consumer Price Index (INSEE).

Source: ART, based on data from public transport operators, motorway concession companies, the Directorate General of Civil Aviation (DGAC) and INSEE.

Scope: journeys of more than 100 km made in mainland France in 2023.

2023 comparison of the price level per kilometre by mode of transport (in Euros including tax per 100 km)



The quality of service has deteriorated for most public transport modes, both in terms of cancellations and delays.

In 2023, the rate of cancellation of transport services increased by 2 points on average, affecting almost all modes of transport. Long-distance TERs (8.9%) and day Intercités (9.3%) are the most affected, with levels higher than

2019, marked by frequent strikes. In addition, punctuality has further deteriorated, remaining well below the levels before the health crisis. Only international freely organised rail services (SLOs) have seen their delay rate decrease in one year. Nevertheless, this improvement in punctuality is similar to a return to normal after an increase of five points in 2022, partly linked to a strong recovery in patronage.

Source: ART, based on data from public transport operators, motorway concession companies and the Official Airline Guide (OAG).
Scope: journeys of more than 100 km made in mainland France in 2023.

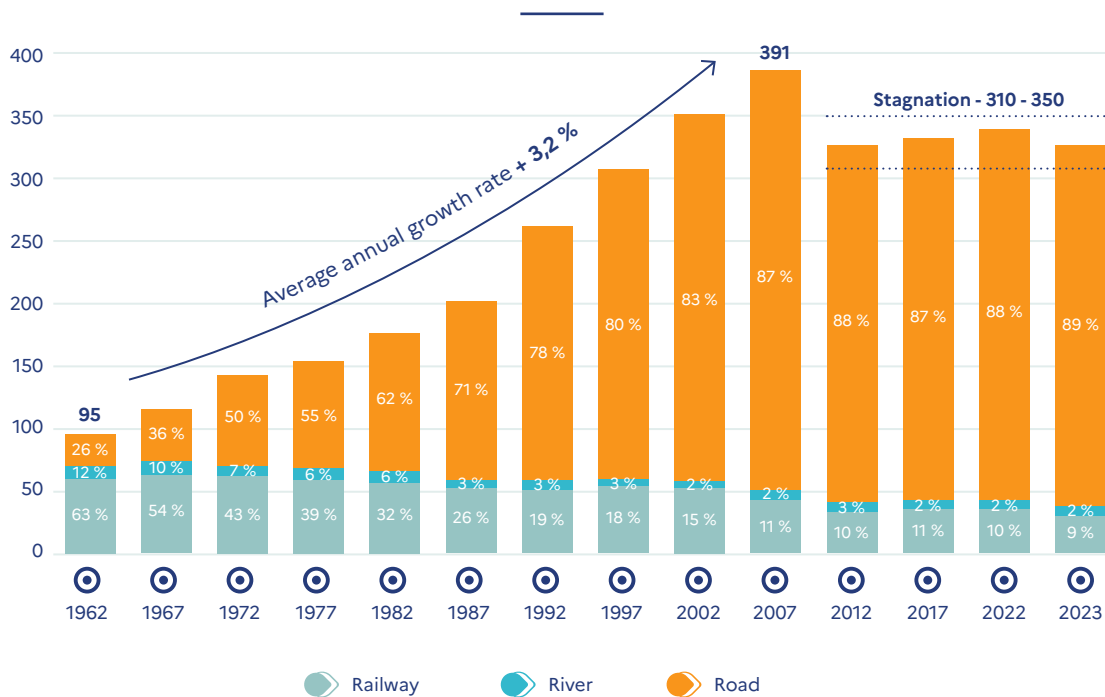
3RD OBSERVATION

Domestic road freight transport remains stable due to its flexibility.

In a context of low dynamics of freight transport in France over the last five years, the rail mode has suffered declines in activity both on domestic and international

routes, while the road mode maintained its level of traffic and consequently increased an already very dominant modal share in freight transport.

**Domestic land transport of goods
In tonnes.km (billions) (and modal shares in %)**



One of the main factors in the attractiveness of road transport is its flexibility, i.e., its speed of point-to-point service, which the rail mode can hardly achieve over a global route. The river mode, moreover, certainly cannot use this factor to differentiate itself from other modes of freight transport.

Sources: Data and Statistical Studies Department (SDES) of the Ministry of Ecological Transition (annual transport reports).




| 4TH OBSERVATION

Greenhouse gas emissions from inland transport are down compared to 2022.

The transport sector (freight and passenger transport combined) is the main contributor to national greenhouse gas (GHG) emissions (33%). By accounting for the emissions generated for the production and distribution of the various fuels and energy sources (the so-called well-to-wheels perimeter), transport contributed to the emission of 148.0 Mt eqCO₂ in 2023 within mainland France, a decrease of -2.0% compared to 2022. Due to the stagnation of freight transport, the improvement in GHG emissions was mainly due to passenger transport.

Emissions per passenger.kilometre depend on the mode of transport, the distance travelled, the engine, and the carrying capacity.

Well-to-wheels GHG emissions of a passenger travelling 1 km by mode in mainland France

Modes of transport	g eqCO ₂ /pass.km in 2022	g eqCO ₂ /pass.km in 2023
 Domestic flights in mainland France <ul style="list-style-type: none"> ◉ < 500 km ◉ 500 – 1.000 km 	150	145
	178	172
	134	129
 Car – mixed distance (average petrol, diesel, electric) <ul style="list-style-type: none"> ◉ Petrol ◉ Diesel ◉ Electric <hr/> Short distance <hr/> Long distance	114	113
	116	116
	114	114
	6	6
	130	129
	74	74
 Intercity coaches (including regional contracted) <hr/> Privately organised coach services (long distance)	146	146
	27	27
 TER <ul style="list-style-type: none"> ◉ Thermal TER ◉ Electric TER <hr/> Domestic TAGV <hr/> International TAGV <hr/> Intercity <ul style="list-style-type: none"> ◉ Thermal intercity ◉ Electric intercity <hr/> Transilien	22	20
	106	99
	5	5
	2	2
	2	2
	5	5
	47	42
	3	3
4	4	

Note: Emissions per passenger.km (rounded to the integer value) are obtained by relating the overall emissions to the number of passenger.km. For flights, emissions are expressed in g eCO₂/PeqKT (per passenger equivalent kilometres-transported) which takes into account the tonnage of cargo and mail transported with passengers (7 passenger equivalent corresponds to 700 kg of cargo and mail). For cars, emissions per vehicle.km are increased (decreased) by +70% for short distances (-70% for long distances) compared to mixed distances (ADEME hypothesis). Occupancy rates are on average 74, 76 and 2.2 passengers per car for short distance, mixed distance, and long distance respectively (SDES and ADEME hypothesis).

Source: ART according to ADEME - Base Empreinte (emission factors), SDES (traffic volume and use, railway companies for trains) and DGAC (from CO₂ emissions per passenger equivalent-kilometres).



Air transport is one of the most emitting modes of transport, with 145 g eqCO₂/pass.km in 2023 for domestic flights in mainland France, down 3% compared to 2022, thanks to a reduction in the number of flights and a stable fill rate. Short flights are particularly polluting, due to the weight of the take-off and climb phases (relative to the cruising phase).

Regarding cars, electric engines generate 6 g eqCO₂/pass.km in 2023, about 20 times less than diesel and petrol engines (114 to 116 g eqCO₂/pass.km, respectively). The increase in the share of electric cars in the French fleet – which now

represents 1.5% of the kilometres travelled, or 6 times more than in 2019 – therefore contributes to limiting emissions from private vehicles.

Coaches in liberalised services (SLO) have one of the best performances in the road mode, with 27 g eqCO₂/pass.km, largely thanks to their high fill rate.

The train remains the most effective mode of transport, with an average of 6 g eqCO₂/pass.km, made possible by the electrification of the network and a significant carrying capacity.



LEGAL ACTIONS BY ART: A TOOL FOR IMPROVEMENT

The year 2024 was full of litigation work for ART, which rendered eleven decisions in the field of dispute settlement, as well as a formal notice decision and a decision closing a procedure for the investigation and finding of a breach. This year was marked in particular by the first dispute settlement decisions of ART in the field of multimodal digital services. ART's litigation work is an essential tool for regulating the sector, and is also useful for improving the regulatory framework.

MAJOR LITIGATIONS BY ART IN 2024

CLARIFICATION OF THE COORDINATION OF EX-ANTE & EX-POST REGULATORY POWERS OF ART

In its decision of 11 February 2021 relating to the settlement of the dispute between the Nouvelle-Aquitaine region and SNCF Gares & Connexions concerning the pricing conditions for access to passenger railway stations, ART had declared itself incompetent to settle disputes relating to the pricing of access fees to these stations. In fact, it already had the power to approve this pricing upstream of its publication, via the compliant opinions it issues annually. This decision was confirmed by the Paris Court of Appeal in a judgment rendered on 27 October 2022.

In a judgment of 16 October 2024, the Court of Cassation annulled the judgment of the Paris Court of Appeal, as well as ART's decision of 11 February 2021, referring to the regulator the task of dealing with the dispute between the Nouvelle-Aquitaine region and SNCF Gares & Connexions. The Court considered that ART was indeed competent to hear disputes relating to the pricing for access to the rail network and service facilities, and not only those relating to the implementation of these prices.



Following this ruling, the academic world underlined, in addition to the ‘risk of opening the floodgates of litigation’, ‘the complexity of the judicial control of the regulatory authorities, at the crossroads of the two orders’. It also called on the ‘European or national legislator [to] clearly state that the power to control pricing (...) ex ante (assent) excludes [the] power ex post (dispute settlement)’¹. Indeed, the competence of ART to rule in dispute settlement (the so-called ‘ex post’ phase) on a pricing that it had previously approved (the so-called ‘ex ante’ phase) raises, in practice, several difficulties.

- ◆ First of all, it is unlikely that a pricing approved ex ante by ART will be challenged by it, unless there is a new element².
- ◆ In addition, the regulator’s own questioning of a pricing approved by itself could undermine the legal certainty of the assent rendered by

ART on the pricing for access to the railway infrastructure or service facilities, a security that benefits both the managers of the essential infrastructures and their users. This could discourage stakeholders with grievances against the pricing approved by ART from respecting the two-month appeal period following the approval of the prices, but rather to refer the matter to ART later as part of a dispute settlement, potentially several years later.

- ◆ The judgment of the Court of Cassation enshrines a dualism of jurisdictional competence over pricing. Indeed, the administrative and judicial judges could be referred to simultaneously in the context of an appeal for abuse of power on the pricing approved ex ante (administrative judge) and in the context of an appeal against the dispute settlement decision rendered by ART ex post (judicial judge).

¹ Grégoire Lemarchand-Ghica, ‘La compétence en matière de règlement des différends et l’office de l’Autorité de régulation des transports : une question d’interprétation’ [Competence in dispute settlement and the office of the Transport Regulatory Authority: a question of interpretation], *La Semaine Juridique Entreprise et Affaires* No. 5, 30 January 2025, 1043.

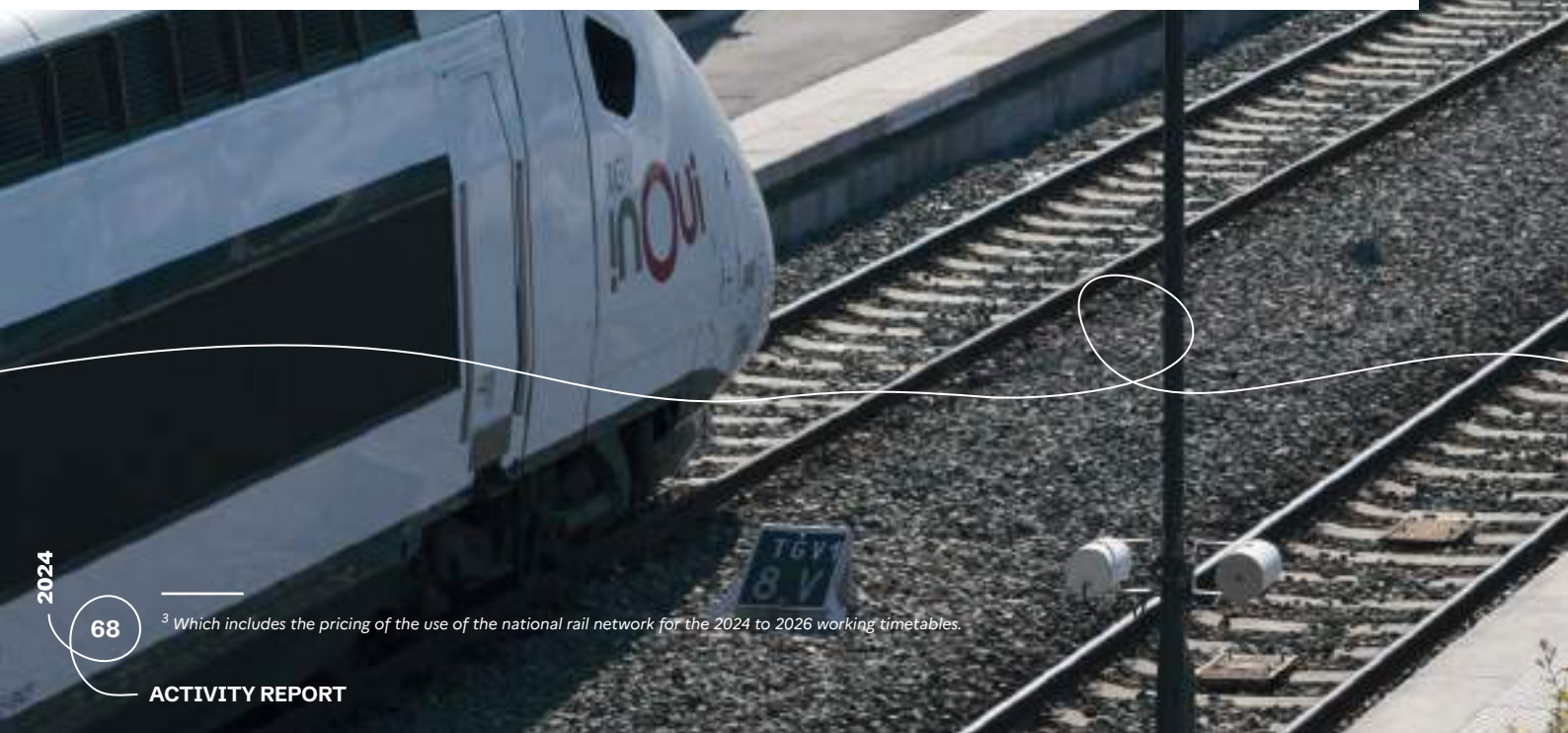
² In a decision of 21 December 2023 (case No. 475334), relating to the implementation of ART’s sanctioning power, the Council of State considered that ‘[i]f the general principle of the right to impartiality, which is binding on all administrative bodies, requires that the authority deciding on the appropriateness of the proceedings does not manifest, in its discretion, either partiality or personal animosity, it cannot in itself prevent the ART board from deciding, in application of the provisions of Article L. 1264-1 of the Transport Code (...), to proceed with the investigation and the establishment of breaches related to a pricing that it has approved in application of Article L. 6327-2 of the same Code’.

CANCELLATION OF THE CHARGES FOR THE USE OF THE NATIONAL RAILWAY NETWORK FOR THE 2024 TO 2026 WORKING TIMETABLES APPROVED BY ART DUE TO A PROCEDURAL DEFECT

In its decision of 5 March 2024, the Council of State, referred to by eight regions, annulled the pricing provisions of the network statement established by SNCF Réseau for the 2024³ working timetable, approved by ART in its assent of 9 February 2023, considering that they were taken at the end of an irregular procedure.

- On the one hand, the Council of State ruled that SNCF Réseau had not complied with the transparency requirement incumbent on it in the context of its task to price the infrastructure of the national rail network, insofar as the information provided to the mobility organising authorities was insufficient on subjects such as the estimation of the amount of the full costs allocated to the agreed transport activities falling under each organising authority, the methods of setting the amount of the 'market charges' applicable to the PSO services, or the rate of coverage of the full costs attributable to these activities.
- On the other hand, the organising authorities were deprived of the guarantee that their opinion would be taken into account due to the adoption, by the SNCF Réseau board of directors, of the network statement the day after the expiry date of the consultation period.

However, the Council of State postponed the effects of the annulment pronounced to 1 October 2024, in order to allow SNCF Réseau to continue to collect the charges applicable to the 2024 working timetable within the time necessary for the development and approval of a new network statement, thus avoiding seriously affecting its financial balance, since none of the substantive grievances formulated by the requesting organising authorities with regard to the structure and level of the pricing proposed by SNCF Réseau was likely, according to the judge, to justify its annulment.





DISPUTE SETTLEMENTS IN THE MOBILITY DIGITAL SERVICES SECTOR

In 2024, ART adopted its first dispute settlement decisions in the field of mobility digital services.

**FEBRUARY
2024**

**SEPTEMBER
2024**

**OCTOBER
2024**

**Referrals to ART by
Myzee Technology**

**Public dispute
settlement session**

**Publication of ART
decisions in the Official
Journal of the French
Republic**

| HAVE YOUR SAY

Christos Kaloudas,
Senior Legal Counsel in
the Legal Affairs Department of ART



What are ART's decisions of 15 October 2024 relating to the settlement of disputes between Myzee Technology and managers of digital services for the sale of public transport tickets?

In February and March 2024, Myzee Technology, owner of the 'Witick' application, which allows users to purchase and validate digital transport tickets, submitted ten requests to ART to settle disputes between it and the managers of digital services for the sale of public transport tickets, regarding the possibility of digitally distributing such tickets to users as a 'multimodal digital service provider'. More specifically, the company asked ART to order the managers of digital sales services to recognise this status and thus to 'finalise and sign' a contract with it allowing it to distribute such tickets. In five of these decisions⁴, ART declared the referrals by Myzee Technology inadmissible in the absence of characterisation of a dispute between the parties on the date of these referrals. In the other five decisions⁵, ART granted Myzee Technology's requests. In particular, it ordered the managers of the digital sales services concerned:



- to draw up and publish, within six months, the general and specific contractual terms and conditions applicable to any private or public person providing a multimodal digital service, and wishing to issue or resell the transport tickets relating to public transport services within the scope of the networks concerned;
- to communicate these to Myzee Technology, and to propose to the latter to enter into negotiations on the basis of these contractual terms and conditions in order to enter into a multimodal digital service agreement.



These are the first dispute settlement decisions adopted by ART in the field of multimodal digital services.



What is the significance of these decisions?

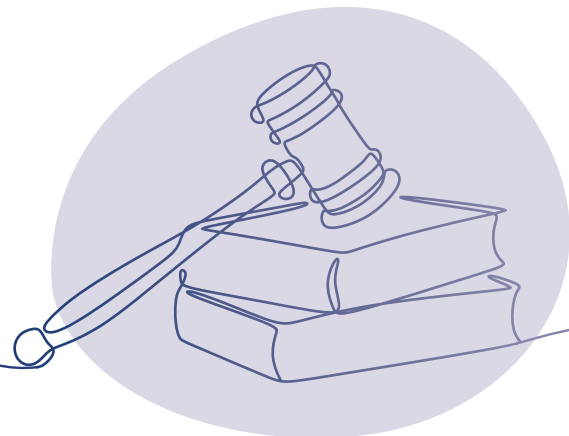
These are the first dispute settlement decisions adopted by ART in the field of multimodal digital services. The five decisions granting Myzee Technology's requests clarified the concept of 'multimodal digital service'.

ART specified that it is clear from Article L. 1115-10 of the Transport Code that this qualification is based on a single criterion, namely that the digital service 'allows the sale' of mobility services.

In addition, the system adopted in these decisions is intended to apply to all managers of digital services for the sale of public transport tickets, in situations comparable to those covered by the decisions concerned⁶.

Thanks to their general scope, these decisions should thus make it possible to strengthen the transparency of the access conditions for multimodal digital service providers to the digital sales services of mobility service managers.

Finally, the five decisions declaring the referrals by Myzee Technology inadmissible provide details on the minimum level of steps that multimodal digital service providers must take with the mobility organising authorities and their delegated companies before referring, if necessary, to ART for dispute settlement.



⁴ These are the decisions relating respectively to the public transport networks of Nantes, Artois Mobilités, Strasbourg, Saint-Étienne, and Valenciennes.

⁵ These are the decisions relating respectively to the public transport networks of Orléans, Tours, Toulon, Bordeaux, and Pays Basque-Adour.

⁶ This applies, in particular, to the publication of the general and specific terms and conditions applicable to the issue or resale of tickets relating to public transport services by these managers.



A REGULATOR CLOSELY LINKED TO THE TRANSPORT ECOSYSTEM

SHARING EXPERTISE & INFORMING THE PUBLIC DEBATE

In 2024, in order to advise the economic stakeholders of the transport sector and shed light on the public debate, ART worked to produce quality information through exchanges with the public authorities during hearings, and thanks to the publication of thematic studies and sectoral reports.

SUPPORTING THE WORK OF PARLIAMENT



public hearings

ART is regularly called upon by Parliament to address the challenges of economic regulation of transport and developments in the regulated sectors. It attaches particular importance to this dialogue, which is necessary for the proper institutional and democratic functioning of our country.

In 2024, it was called upon nine times by the National Assembly and the Senate on various regulatory issues, such as the preparation for the expiry of motorway concession contracts or long-term scenarios for the French rail network. It was also consulted on its financial and human resources, as well as on its regulatory activity in the main regulated sectors, as part of the draft finance law for the year 2025.





REGULAR DIALOGUE WITH OTHER INDEPENDENT AUTHORITIES

INTER-AAI/API MEETINGS

As provided for in the 2017 law on the status of independent administrative authorities (AAI) and independent public authorities (API), ART regularly collaborates with its counterparts.

In 2024, the presidents of the AAI and API met on two occasions: in June, a first meeting was organised by the Autorité de régulation de la communication

audiovisuelle et numérique (Regulatory Authority for Audiovisual and Digital Communication – ARCOM) to discuss the latest European regulatory developments. In November, a second meeting was hosted by the Autorité de la concurrence (Competition Authority – ADLC) to discuss issues relating to human resources, digital sovereignty, and the use of AI.



A REGULATOR INVOLVED IN EUROPEAN WORK

In 2024, ART participated in the construction of a European area for seamless mobility through:

- ◆ its participation in European and international networks of regulators (IRG-Rail, Thessaloniki Forum of Airport Charges Regulators, European Network of Rail Regulatory Bodies, Single European Railway Area Forum, OECD Network of Economic Regulators);
- ◆ the co-regulation of the Channel Tunnel with its British counterpart, the Office of Rail & Road (ORR), and of Basel-Mulhouse Airport, with the Swiss Federal Office of Civil Aviation (FOCA);
- ◆ bilateral meetings, in particular with the European Commission (Directorate-General for Competition – DG COMP – and Directorate-General for Mobility and Transport – DG MOVE).

MAJOR ART PUBLICATIONS



Passenger transport in France – Volume 3



Report on the reception of liberalised coaches in Île-de-France

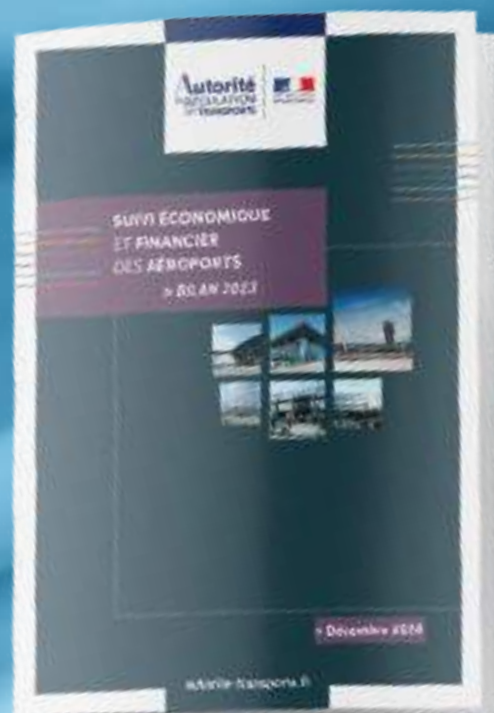


Strategic project 2024–2029 of the French Transport Regulatory Authority

Report on the code of good conduct and the independence of the SNCF Réseau infrastructure manager



General economy of motorway concessions



Economic and financial monitoring of airports – 2023 report

LISTENING TO THE SECTORS: CONSULTING AND INTERCHANGING

By launching public consultations and organising events and meetings with stakeholders in the sector, ART shared its work and reflections in line with one of its values, 'dialogue', that guides its daily action.

EVENTS ORGANISED BY ART...

- Webinar to consult users and customers of rail services – 8 February 2024



- 'Coach station meetings' webinar chaired by Sophie Auconie, Vice-President of ART – 20 September 2024



- 'Mobility Law' symposium organised jointly with Paris Dauphine University – 30 April 2024



- Press conference for the presentation of ART's strategic orientations for the period 2024–2029 – 24 September 2024



- 'Mobility data meetings' webinar chaired by Sophie Auconie, Vice-President of ART – 7 October 2024

FIELD VISITS...

VISIT TO THE EOLE PROJECT 'EXTENSION OF THE RER E LINE TO THE WEST'

Thierry Guimbaud, President of ART, accompanied by Vice-Presidents Sophie Auconie and Florence Rousse and the departments, visited the Eole project site at La Défense Grand Arche and spoke with Xavier Gruz, Project Director. *Wednesday, 24 April 2024.*



TRAVELLING ON THE APRR (AUTOROUTES PARIS-RHIN-RHÔNE) MOTORWAY NETWORK

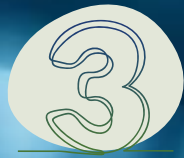
Thierry Guimbaud, President of ART, accompanied by Vice-Presidents Sophie Auconie, Florence Rousse and Patrick Vieu, visited the APRR motorway network and spoke with Philippe Nourry, President of APRR, as well as with the management team of the motorway concession company. *Thursday, 19 September 2024.*

VISIT TO MARSEILLE PROVENCE AIRPORT AND VITROLLES MULTIMODAL EXCHANGE HUB

The ART board met with Pierre-Alain Roche, Chairman of the Supervisory Board of Marseille Provence Airport, and other representatives of the airport operator to visit the 'Cœur d'aéroport' terminal and discuss issues related to airport regulation (changes in the regulatory framework, economic regulation contracts, future investments). The board then attended a presentation on the action of the Aix-Marseille metropolis about intermodality. *Friday, 13 December 2024.*



PUBLIC CONSULTATIONS LAUNCHED IN 2024...



public consultations

In 2024, by launching three public consultations, ART continued the work of sharing its activities, questions and reflections, in line with its value 'dialogue', which is one of its drivers.

- ART consulted all the stakeholders in the sectors it regulates as part of the development of its strategic orientations for the period 2024– 2029, in order to collect their observations on the regulator's assessment and future priorities.
- It consulted the interested stakeholders of the rail system on the changes to the accounting separation rules proposed by SNCF Voyageurs from the 2023 accounting year.
- It consulted the interested stakeholders of the rail system on its draft guidelines on the conditions and methods of control of exemptions from the competitive award of contracted passenger services provided for by Regulation (EC) No. 1370/2007 of 23 October 2007, known as 'PSO' (public service obligation), with a view to the competitive tendering of public passenger transport service contracts by rail from 25 December 2023.

TAKING THE FLOOR IN THE PUBLIC DEBATE

ART IN THE MEDIA...

- Interview with Thierry Guimbaud, President of ART, by **Contexte** on his appointment as President of ART, on 18 March.
- Interview with Anh Lai, economist at the Market Observation Department, and Pauline Henriot, area manager at ART's Transport Sector Regulation Department, for **Mobility-Cités** on the coach transport market on 19 June.
- Interview with Fabien Couly, Director of Market Observation, and Olivier Salesse, Director of Sectoral Regulation of Rail Transport and RATP, for the magazine **'Que choisir'** for the months of July and August on the opening up to competition in the rail sector.





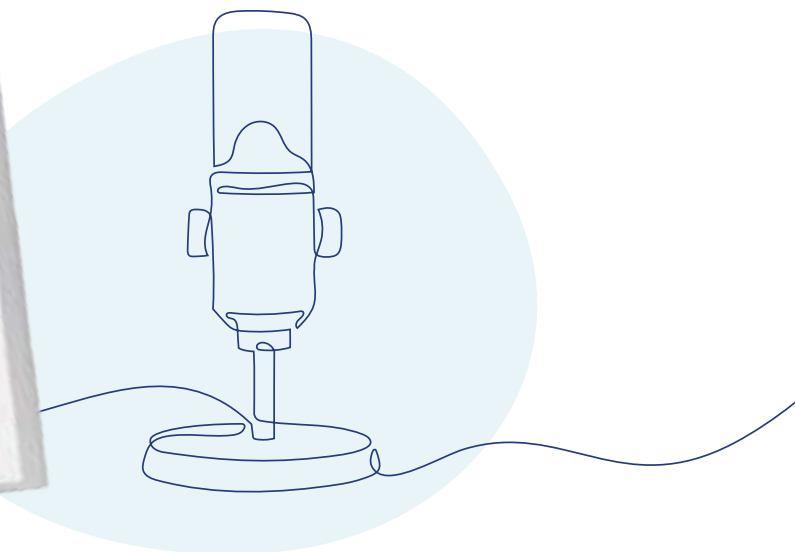
- ◆ Interview with Claudia Judith, economist at the Market Observation Department, and Anthony Martin, Deputy Director of Market Observation, for the newspaper **Le Monde** on the development and quality of the rail offer in France, on 11 July (217,000 views).
- ◆ Interview with Thierry Guimbaud, President of ART, for the magazine **Aviation Civile** on ART's missions as regards airport and on the evolution of the airport regulatory framework, in September.



- ◆ Interview with Thierry Guimbaud, President of ART, for **Mobility-Cités** on the challenges related to coach station infrastructures, on 4 November.
- ◆ Interview with Thierry Guimbaud, President of ART, by the **EBRA Group** on the transformations of the railway landscape in the next decade, in November.
- ◆ Interview with Thierry Guimbaud, President of ART, by **Ville, Rail et Transports** on the role and missions of ART and the major challenges of the transport sector, in November.



- ◆ Interview with Thierry Guimbaud, President of ART, by **News Tank Mobilités** on ART's report dedicated to the reception of liberalised coaches in Île-de-France.
- ◆ Interview with Thierry Guimbaud, President of ART, for **the journal Concurrence** on ART's action in favour of better mobility for tomorrow, in November.





ART'S INTERVENTIONS IN SYMPOSIA, CONFERENCES AND ROUND TABLES...

INTERVENTION BY THIERRY GUIMBAUD, PRESIDENT OF ART

- ◆ At the webinar *'Mobilities: is competition on the move?'* organised by the French **Competition Authority** on the theme *'New entrants in the rail markets: still too many obstacles?'*, on 13 March.
- ◆ At the Mobilités debrief organised by **News Tank Mobilités**, on 9 October.
- ◆ At the congress of the **National Federation of Passenger Transport (FNTV)** on the theme *'How to guarantee access to transport for all?'*, on 17 October.



- ◆ At the congress of the **French Airports Union (UAF)**, on the theme *'What regulation for the airport sector?'*, on 3 December.



INTERVENTION OF FLORENCE ROUSSE, VICE-PRESIDENT OF ART

- ◆ At the *'Night Trains'* symposium organised in the Senate by Senator Jacques Fernique, member of the Regional Planning and Sustainable Development Committee, and the Destination Trains de Nuit association, on 17 June.
- ◆ At the fourth annual meeting of the *'rail freight of the future'* organised by **Objectif OFP** on the theme *'What visions and perspectives for rail freight?'*, on 26 November.



INTERVENTION OF SOPHIE AUCONIE, VICE-PRESIDENT OF ART

- ◆ At the general meeting of the National Federation of Transport Users Associations (FNAUT), on 23 March.

CONSULTATION ON THE COMMUNICATION STRATEGY

In 2024, ART initiated work related to its communication strategy to adapt it to the challenges of the transport sector and to be as close as possible to its expectations.

To this end, an inventory of its communication with its stakeholders was carried out: representatives of public authorities, transport operators, infrastructure managers and the press shared their comments. In particular:

- the stakeholders interviewed underlined the independence of ART, reflected by its neutrality and honesty. Its expertise was also noted, with its reports and publications being valuable and useful sources for all its audiences. Its missions are globally understood and recognised;
- rooted in the reality of the field and open to reflection, ART's willingness to open up to dialogue with stakeholders is highly appreciated. ART enjoys an image of a realistic advocate in relation to the transport market and mobility;
- for a better promotion of ART's work, the adaptation of its publications in a synthetic format and translated into English was mentioned in particular. Putting ART's studies into perspective at European and international level, as well as improving the ergonomics of the website, are other areas for improvement.

SPONTANEOUS COMMENTS ABOUT ART

Opening Listening Competency Discipline Serious
INDEPENDANCE
Transparency Honesty Expertise Trust Exchange Dialogue

FOLLOW US

WEBSITE

Thanks to ART's website, visitors can follow its news and subscribe to the various notification alerts that are on offer:

- ◆ news
- ◆ press releases decisions and opinions
- ◆ public consultations

<https://www.autorite-transports.fr/>

SOCIAL NETWORKS

ART is on LinkedIn and YouTube through which it relays its actions, publications, decisions and opinions, thus offering another opportunity to keep abreast of its news.

<https://www.linkedin.com/company/art-autorite-de-regulation-des-transports>

YouTube : autoritederegulationdestra7864



ALL AT THE SERVICE OF USERS & MOBILITY

In 2024, ART's agents, with varied and multidisciplinary profiles, were committed to improving the operation of the transport sector, and more particularly of the regulated areas, at the service of users and mobility¹.

| ART'S WORKFORCE



96

employees

as at 31 December 2024,
excluding board members

95 %
executives

86 %
**contractual
agents**

14 %
**of civil servants
seconded
or made available**



Authorised workforce of

102
FTEs

(full-time equivalent)

15

**senior agents
internal mobility**

More than

1.582
**applications
received**

for 20 open positions



38.5
years
of average age

3.5
years
of seniority
of agents on average

52 %
men

48 %
women

In order to align with ART's strategic orientations, the human resources mission focuses in particular on attracting, managing and retaining skills, real levers of ART's performance.

But also, ART's human resources mission ensures...

- ◆ **Achieving an ambitious training plan** with a 95% completion rate, i.e., 99 training courses completed for 149 participants;
- ◆ **Establishing a community of managers to promote peer-to-peer exchanges;**
- ◆ **Welcoming and ensuring the proper integration of new employees** (intranet communication, newcomers' day, discovery report).
- ◆ **Ensuring and promoting the quality of working life (QWL) with:**
 - the QWL week organised in June 2024: osteopathy sessions, culinary competition, blind test, 'health' breakfast, etc.;
 - regular questionnaires to analyse the QWL of ART agents;
 - work and cohesion seminars to strengthen our cohesion!



THE AGENTS' WEATHER

ART has made quality of working life one of the priority areas of its internal plan. Internal surveys and polls reveal a high level of commitment among agents and a good quality of atmosphere at work.

7.8/10



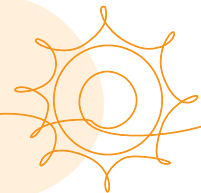
ART's success in the assignments entrusted to it by the legislator (from 'I don't care' to 'it's really important to me')



'Getting involved in the Authority's assignments is essential for the success of the Authority!'



7.8/10



The general atmosphere in my department (from 'cold' to 'friendly')



'A conviviality that contributes to the emergence of a renewed and always relevant thought!'



ORGANISATION & RESOURCES

Although it has limited credit resources to exercise the new powers entrusted to it in recent years, and although it faces constrained investigation deadlines, the entire ART workforce, including its board, a sanctions committee and various departments, was mobilised in 2024 to build an ever more efficient regulation at the service of users and mobility.

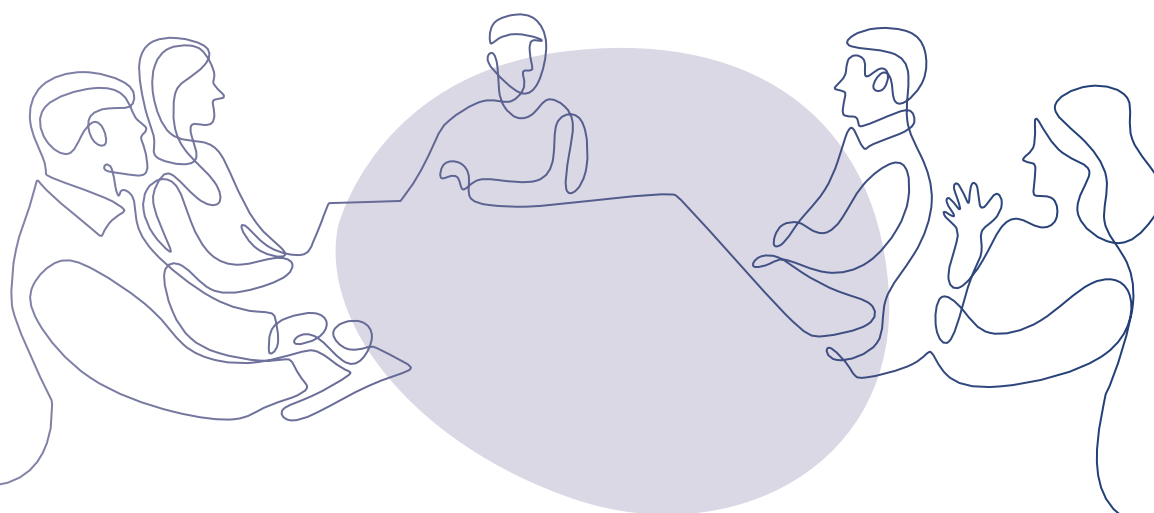
| THE BOARD

As ART's decision-making body, the board defines the main orientations, and adopts the opinions and decisions – with the exception, however, of sanction decisions – which form the basis of its general doctrine.

Its independence is guaranteed in particular by the status of its members. They are appointed for a non-revocable and non-renewable six-year term, on the basis of their economic, legal or technical expertise in the field of digital services, land or air transport, or for their expertise in competition, particularly in the field of network industries. The functions of a member of the ART board are incompatible with a number of

mandates, activities and functions, in accordance with Law No. 2017-55 of 20 January 2017 governing the status of independent authorities and the code of ethics. At the end of their term of office, the members of the board may not occupy any professional position or exercise any responsibility within any of the companies or entities falling within the scope of the regulation for a minimum period of three years.

Following Law No. 2019-1428 of 24 December 2019 on mobility orientation, the ART board is composed of five permanent members, including a president and four vice-presidents.



| THE SANCTIONS COMMITTEE

Independent of the board, in order to separate the functions of prosecution and investigation on the one hand, and the functions of ruling on the other, the Sanctions Committee rules on referral by the board and can sanction regulated companies for breach of their obligations, at the end of an adversarial procedure between the parties. It includes a member of the Council of State, an adviser to the Court of Cassation and a magistrate at the Court of Auditors, all three appointed for a non-renewable period of six years.

The following are members of the Sanctions Committee:

- Mr Mathieu Le Coq, Master of Requests at the Council of State, from 9 December 2021 and appointed Chairman of the Sanctions Committee by decree of 29 March 2022;
- Ms Marie-Louise Desgrange, Honorary Adviser to the Court of Cassation, from 3 October 2024.

| THE DEPARTMENTS

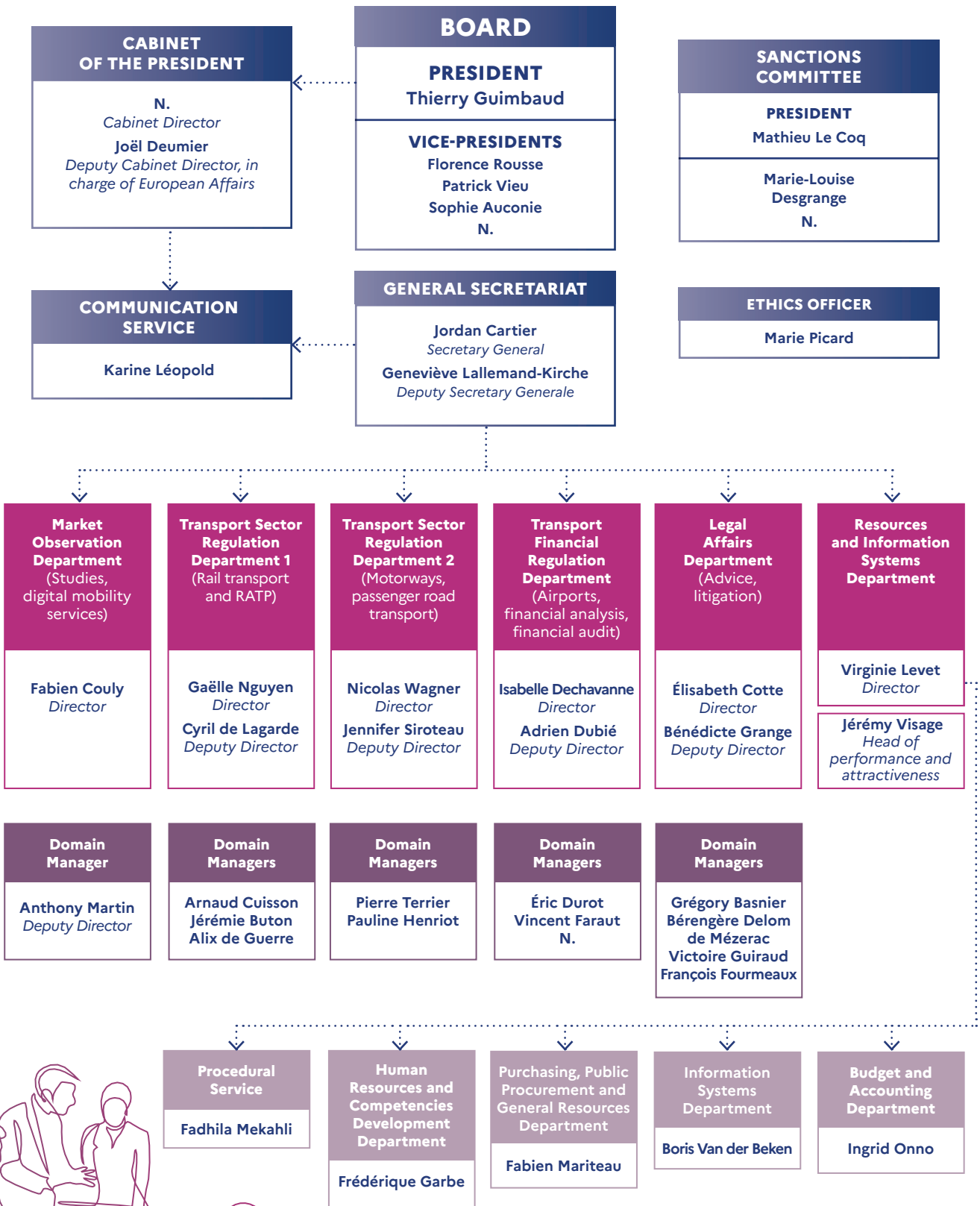
Responsible for supporting ART in the fulfillment of its assignments, in particular to ensure the preparation and execution of the opinions and decisions adopted by the board, the departments bring together nearly one hundred employees.

The missions entrusted to ART by law combine a range of specialised skills in economics, law, financial auditing and analysis, data analysis and sector-specific expertise. ART therefore strives to recruit employees with a high level of expertise.



ORGANISATION CHART

As of 1 June 2025



| RESOURCES MOBILISED



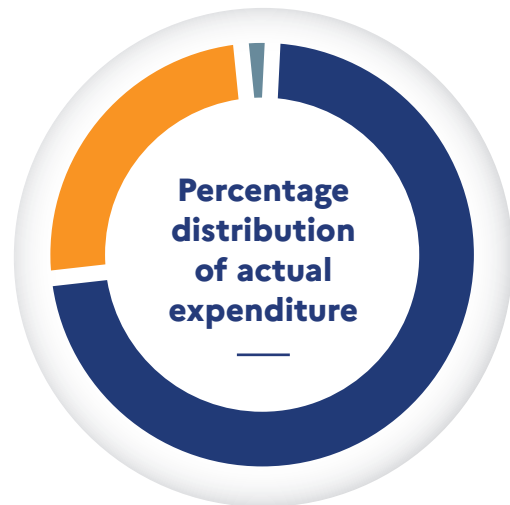
The 2024 resources, consisting of the subsidy for public service charges and a levy on the working capital, amount to a total of €16.23 million. The subsidy, revalued in 2024, amounts to €15M and represents 92.4% of the resources mobilised (compared to 88.4% in 2023). Since the abolition of the earmarked taxes levied on companies in the regulated sector in 2020, the ART's financing has come partly from its working capital, i.e., €1.23M (compared to €1.397M in 2023).

 State subsidy  Levy on working capital

| ART'S EXPENDITURE

The actual expenses of 2024, consisting of personnel, operating and investment expenses, amount to a total of €16.23M.

Personnel expenses amount to €11.89M and represent 73.2% of total actual expenses, compared to 71.8% in 2023. Operating expenses represent €4.14M or 25.5% (compared to 30.8% in 2023) and investment €200,000 or 1.2% (compared to 1.7% in 2023).

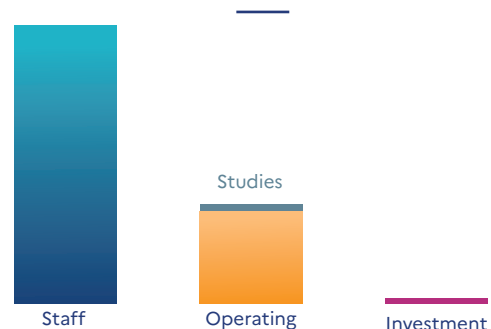


 Staff  Operating  Investment

Actual expenditure incurred

The outsourcing of economic, sectoral, legal and financial studies in regulatory matters is €232,000, or 5.6% of the amount of operating expenses.

ART therefore carries out most of the studies necessary for its activity.



ART's working capital had to be mobilised to cover the gap between its financial resources and the amount of its expenses. The latter have, in fact, increased sharply since 2015, with the increase in workforce that has accompanied the expansion of ART's assignments to five new sectors, and the enhancement of its competencies in the rail sector: the ceiling of ART's authorised jobs has thus increased from 62.5 FTEs (Full-Time Equivalents) in 2015 to 102 FTEs since 2022, an increase of 63%. However, while its allocated financial resources were €11M in 2015, the Finance Act for 2024 set the subsidy for ART's public service charges at €15M, so that ART's financial resources per FTE are now at a level, in nominal terms, more than 34% lower than in 2015 and, in real terms, more than 16%. The structurally insufficient level of the budget allocated to ART has thus

forced it, for several years, to balance its budget by drawing on its working capital, for a cumulative amount of €13.4M over the period 2020–2024, which has now reached a critical level, representing three and a half months of operation.

Even though, in recent years, ART has made significant management efforts to optimise its operation and control its costs while continuing its regulatory action, this systemic decorrelation between ART's resources and needs, over several years, is likely to call into question its organisational sustainability and independence, in particular its ability to invest to renew its equipment or develop its information systems, even though it collects large amounts of confidential data from operators in the sectors it regulates, which it must ensure is processed and protected.



POOLING WITH THE SERVICES OF OTHER INDEPENDENT AUTHORITIES OR WITH THOSE OF MINISTRIES

ART has continued its partnership policy initiated in recent years:

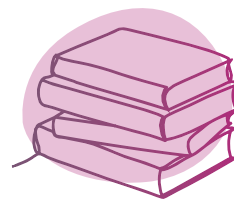
- participation in the biannual interchanges established since 2017 between the presidents of several independent authorities;
- sharing of experiences and 'best practices', and benchmarking on issues relating to sectoral economic regulation and human resources (ethics, recruitment practices, legal news relating to changes in public service law, HR mobility, dissemination of job offers within the networks of independent administrative and public authorities, etc.) and information systems (securing information systems, translation of regulatory changes, exchanges and sharing on business tools, etc.) ;
- establishment of a grouping of orders in 2021 with the Financial Markets Authority (AMF) and the High Council of the Statutory Auditor (H3C), for services relating to the provision of transport tickets as well as ancillary services (hotel reservations) as part of the assignments carried out by the agents. This pooled market allows the simplification of administrative procedures as well as the obtaining of attractive rates;
- participation in the permanent procurement grouping led by the State Purchasing Department since ART's accession in 2019;
- agreement with the Centre of Expertise for Digital Regulation (PEReN)¹, allowing ART to have technical assistance in the regulation of digital platforms.

¹ PEReN is a service with national competence created by Decree No. 2020-1102 of 31 August 2020, placed under the joint authority of the ministers responsible for the economy, communication and digital affairs, and attached to the Director General of Enterprises for its administrative and financial management. The objective of PEReN is to constitute a centre of excellence capable of supporting all State administrations that intervene on the subjects of regulation of digital platforms (independent administrative and public authorities such as ministerial departments), by providing them with technical assistance in the fields of data processing, data science, and algorithmic processes. ART is included in the schedule annexed to Decree No. 2022-603 of 21 April 2022 establishing the list of independent administrative and public authorities that can use the support of the Centre of Expertise for Digital Regulation and relating to the data collection methods implemented by this service as part of its investigational activities, and can therefore use the services of PEReN, as part of an agreement established between the two parties.

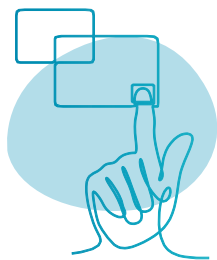
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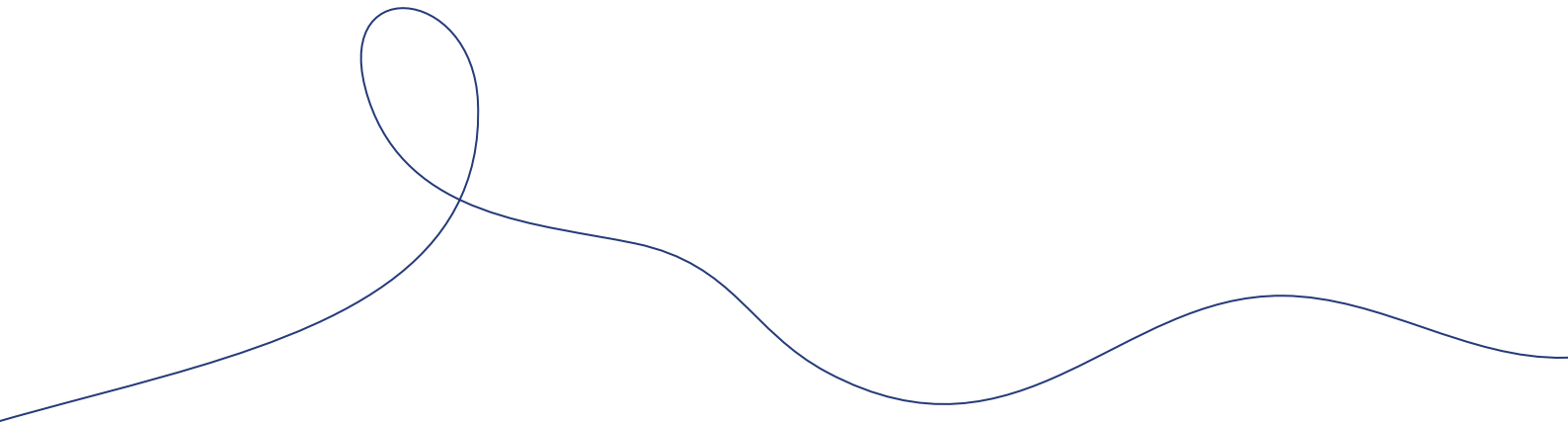


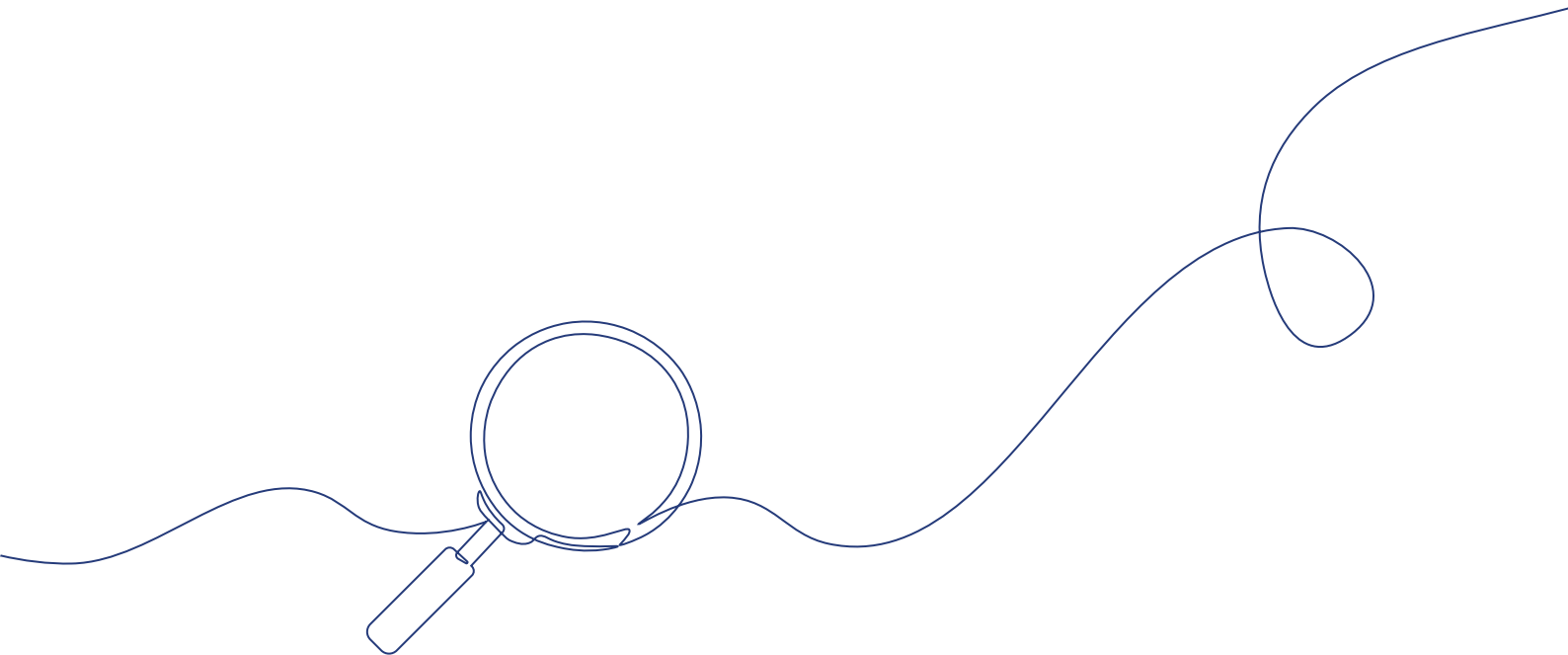
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