



# The public **railway** company in Belgium:

a work in progress based on  
European benchmarking

Carole Coune

Management bodies advisory and support

SNCB-Holding

# Les constats

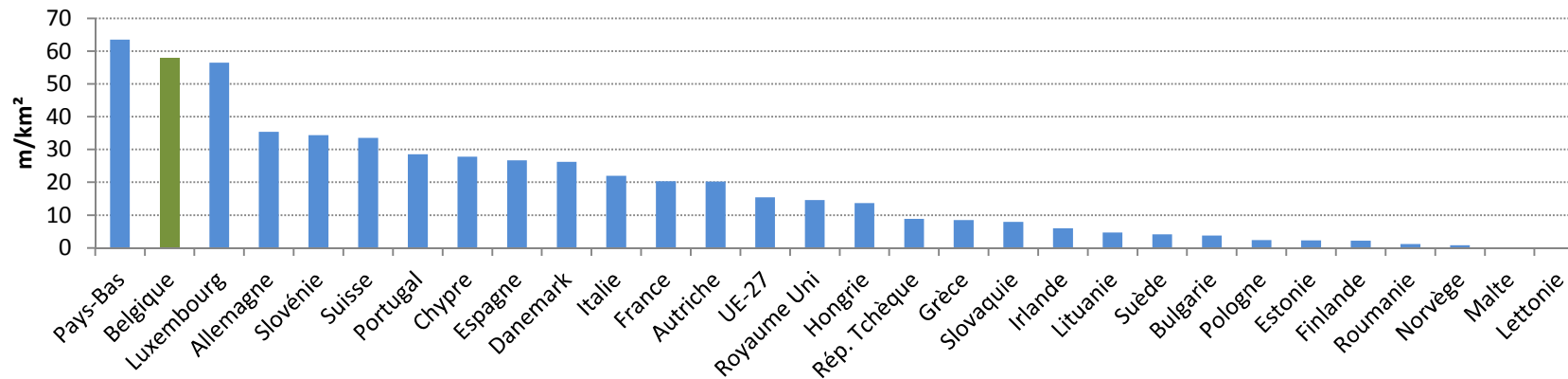


- La mobilité est **vitale** pour l'économie et la société
- Le train: peu énergivore, **écologique** et sûr
- Les **parts de marché** du rail

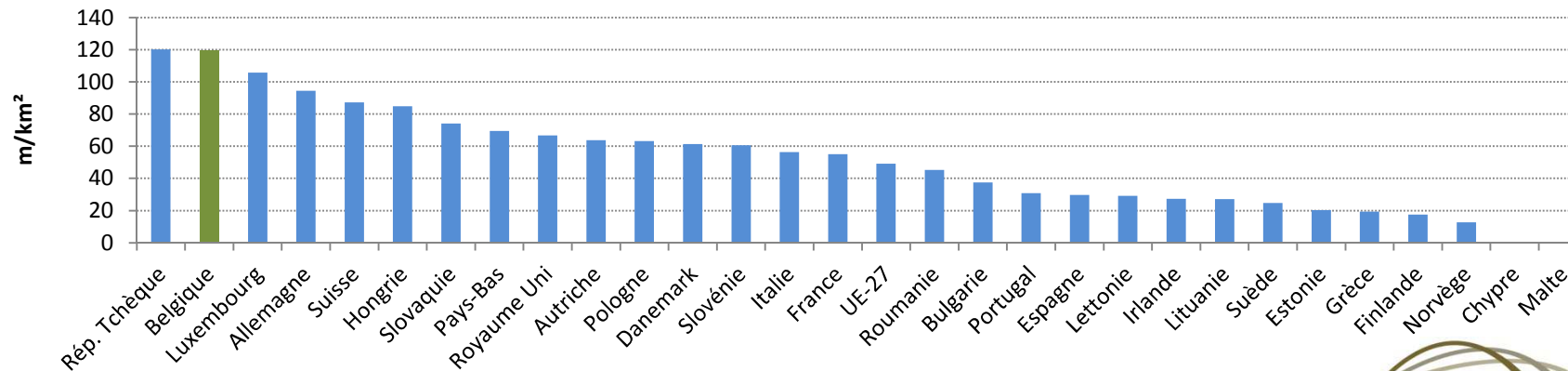
# La mobilité est vitale pour l'économie et la société



Densité de quelques réseaux autoroutiers européens (2008)  
(UE-27 + Norvège + Suisse)  
Source: SPF Economie, Banque de données Transport



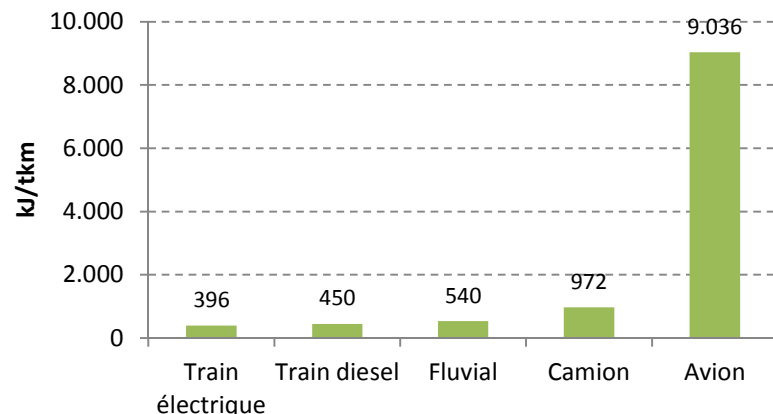
Densité de quelques réseaux ferroviaires européens (2009)  
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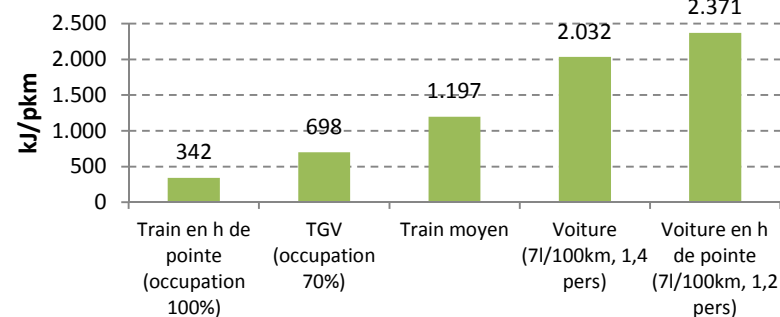
# Le train: peu énergivore, écologique et sûr



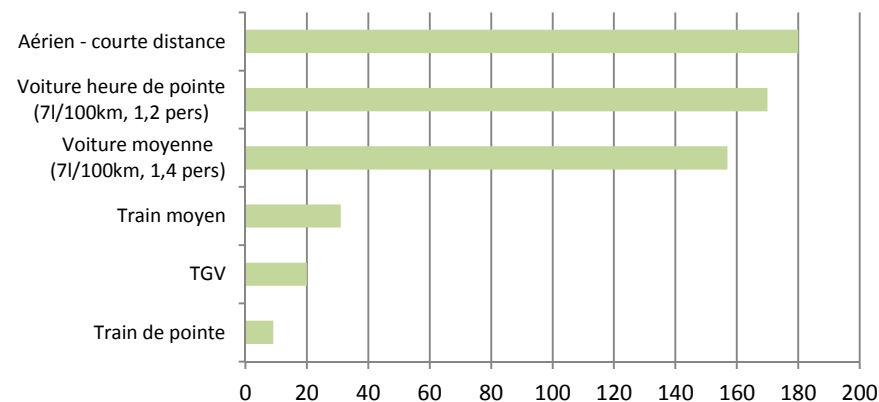
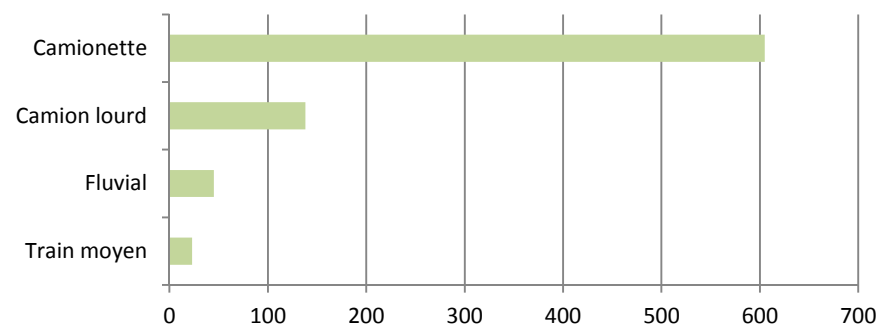
**Efficacité énergétique transport de marchandises: consommation par tonne-km**



**Efficacité énergétique trafic voyageurs: consommation par voyageur-km**



**Emissions de CO<sup>2</sup> trafic voyageurs et marchandises**



De 2001 jusqu'à 2010 inclus	Route	Chemins de fer	
		Voyageurs	Passages à niveau (autres que voyageurs)
Tués	11097	56	119
Passagers-km (x10 <sup>9</sup> )	1108,67	93,39	
Nombre de tués par milliard de pkm	10,01	0,6	

# Rail's market share of passenger and goods transport in some European countries



2009	Rail freight market share	2010	Rail passenger transport market share
Switzerland	34.6 %	Switzerland	17.2 %
Austria	31.7 %	Austria	11 %
Germany	18.5 %	France	9.8 %
Belgium	10.8 %	Netherlands	9 %
France	10.8 %	Germany	7.9 %
Netherlands	6 %	Belgium	7.2 %

Source: Eurostat/European Commission

# Les principaux défis du secteur ferroviaire belge



- **Personnes**: la mobilité en réseau, la plateforme ICT, la gare/plate-forme de mobilité, l'autopartage
- **Fret**: les déficits de l'opérateur dominant et les besoins en investissements
- Le projet de nouvelle **organisation**

# What is networked mobility?



**Choosing a convenient mobility service adapted to each person's individual needs/preferences**

## **Traditional**

- Same journey every day
- One or two forms of transport
- Faithful to their habits, don't need much information

## **Networked**

- Variable according to circumstances
- Combines a number of different transport modes
- Shared: "Usage" rather than "ownership"
- Employs new information technologies  
e.g. Go-Mobile multimodal ICT platform

# Scotty, la plate-forme ICT multimodale Go-Mobile



The screenshot displays the Scotty mobile application interface. At the top, there is a navigation bar with icons for home, search, train, car, bus, parking, and information, along with the text "Bienvenue Scotty" and "Déconnecter". The main header features the Scotty logo and the slogan "Dites oui à la liberté de mouvement", with a "Donnez votre feedback" button.

The interface is divided into several sections:

- Mon personal mobility screen:** A grid of widgets showing travel routes and times. Examples include:
  - RUE DE LA LO... VERS AVENUE REINE... (43' File: 11')
  - B-PARKING GARE OTTIGNIES P1 - AV. DES VILLAS (Aucune information)
  - OTTIGNIES VERS BRUXELLES-LU... (11:17, 11:20, 18')
  - BRUXELLES-LU... VERS OTTIGNIES (11:24, 11:41, 19')
  - OTTIGNIES
  - BRUXELLES-LUXEMB...
  - RUE DE LA LO... VERS AVENUE IMPÉR...
  - AVENUE IMPÉR... VERS RUE DE LA LO...
  - GERER LES WIDGETS
- Planner rapide:** A section titled "SCOTTY, VOTRE GUIDE" with input fields for "De:", "A:", and "Date:" (19/03/2012, 11:15). It includes checkboxes for "En train", "En voiture", "En bus, tram et métro", and "A pied", and a "Rechercher" button.
- CARTE DU TRAFIC:** A map showing traffic conditions in Belgium, with the text "Carte reprenant toute l'info mobilité en Belgique".
- 15 km bouchons:** A circular gauge showing a traffic jam of 15 km.
- PAS CLAIR? CONSULTEZ LE Video tutorial:** A button for a video tutorial.
- BRUSSELS AIRLINES AUGMENTE SES...:** A news snippet about Brussels Airlines routes to Yaoundé, Cameroon, with a "Continuer à lire" link.



# Today's station

## Mobility platform

- Gateway to the city
- At the heart of a living and working area
- A place to meet and shop



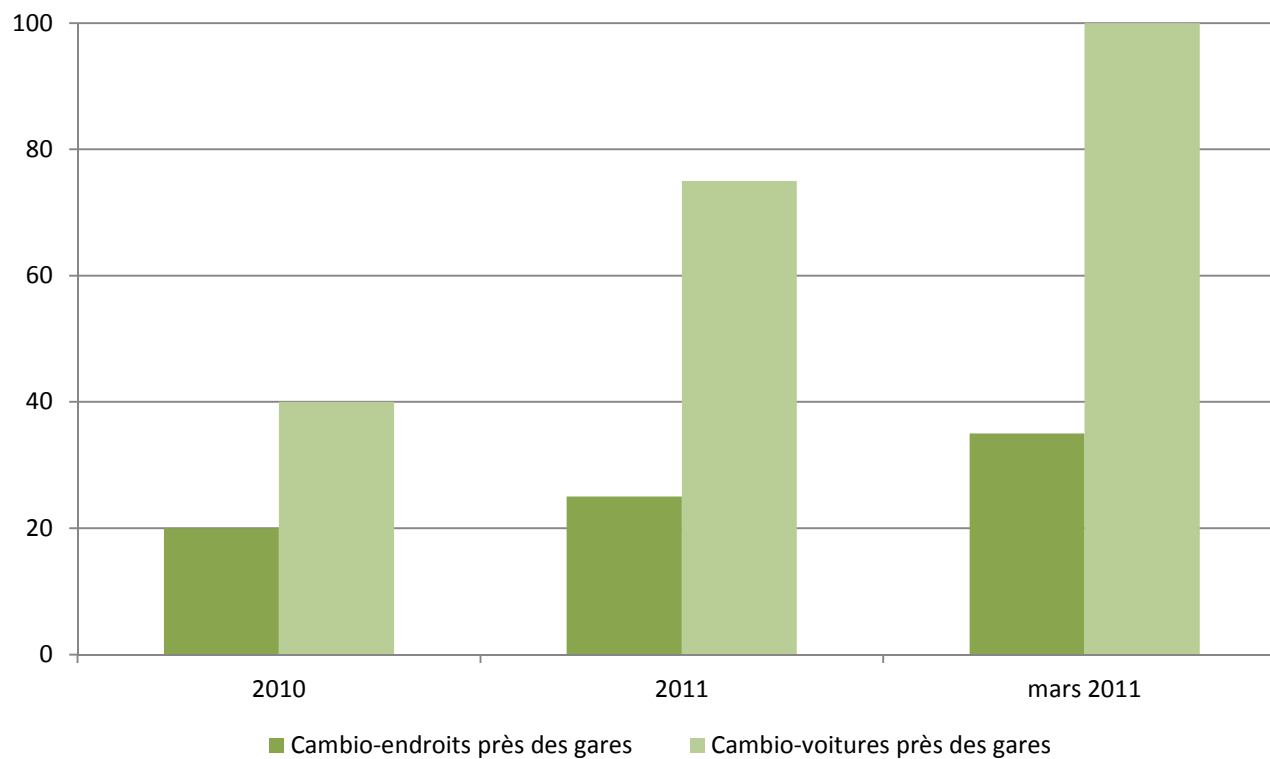
## Station users' expectations

- Access
- Intermodality
- Getting around easily
- Facilities and information
- Cleanliness
- Comfortable waiting areas
- Security
- Entertainment, culture
- Shopping
- Numerous public and private services

# Les voitures partagées



## Evolution du nombre de voitures partagées près des gares

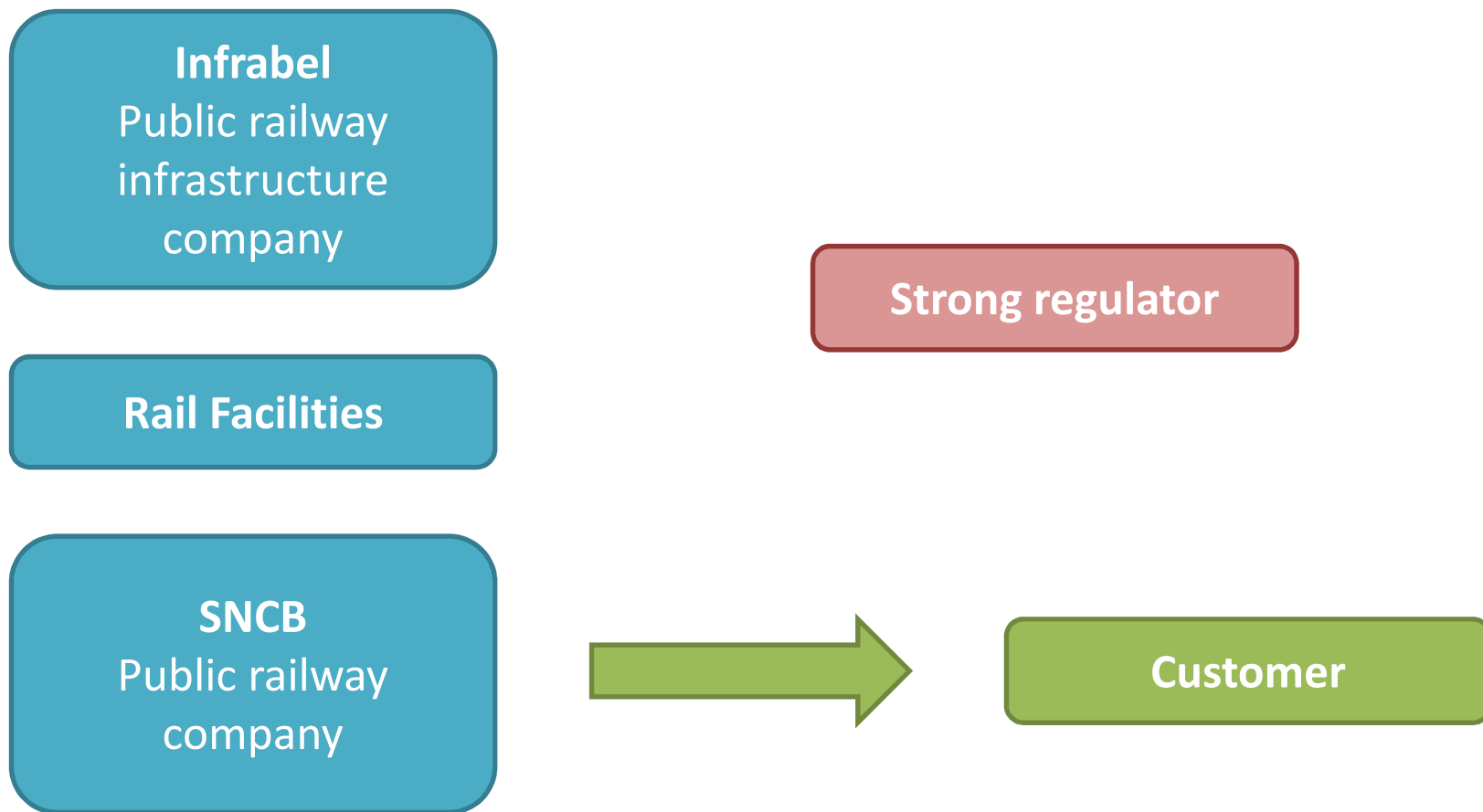


# All aboard



- **Karlsruhe**: integration of light rail in the city and the existing rail network ! 40% of customers have stopped using their car
- **Tokyo**: new mobility solutions ! 45% **less** car ownership among 20-40 year olds
- **USA**: 7,000 shared cars for 400,000 users
- **Belgium**: 2000-2011: +50% of train passengers ! 45% of commuter journeys (over 30 km outside Brussels) are by train (from Bruges, 70%; from Liège 57 %)

# Proposal by Minister Paul Magnette

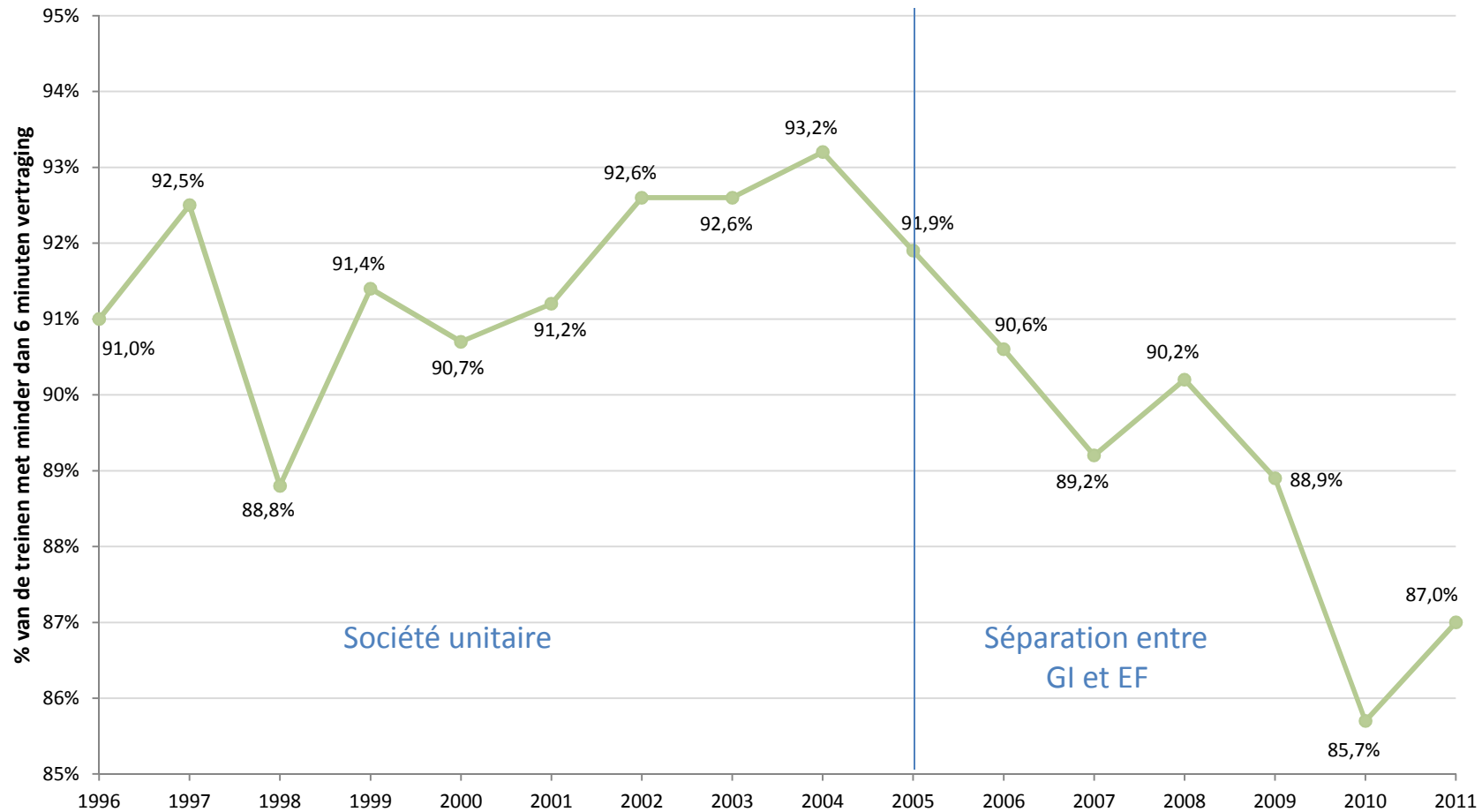


# Le 4ème paquet ferroviaire: l'avenir du rail européen



- Au coeur du débat: la **qualité** et l'**efficacité** des chemins de fer européens
- En Belgique, la dégradation de la ponctualité
- Dernier Conseil informel des Transports (juillet 2012): les 27 veulent **booster les systèmes intelligents**
- Un outil possible: **un régulateur fort** et un renforcement de la coordination européenne de la régulation

# Ponctualité des trains de voyageurs du service intérieur de 1996 à 2011 – sans neutralisation





- “The development of trans-European **transport and telecommunications networks** could be more effective if these two central policies were integrated.”
- “ITS’s are in a position to offer European citizens the possibility of **innovation** and **growth** which the EU sorely needs.”

*Efthymios Flourentzou,  
Cypriot Communications Minister assuming the EU Presidency*

Source: Bulletin quotidien Europe

# L'avenir du rail belge: 10 objectifs pour développer les parts de marché



- L'usager-client comme point de départ d'une mobilité croissante et durable
- L'entreprise publique ferroviaire, moteur de la mobilité en réseau
- Le meilleur rapport qualité/prix
- La santé financière
- L'utilisation optimale des moyens publics
- La transparence des flux financiers
- Un régulateur fort
- Une tarification stimulante
- La gouvernance: from "my tracks, your trains" to "our railways"
- Le consensus social



# The best value for money: attention for the **Mobility chain**



From a rail point of view, the “mobility chain” includes:

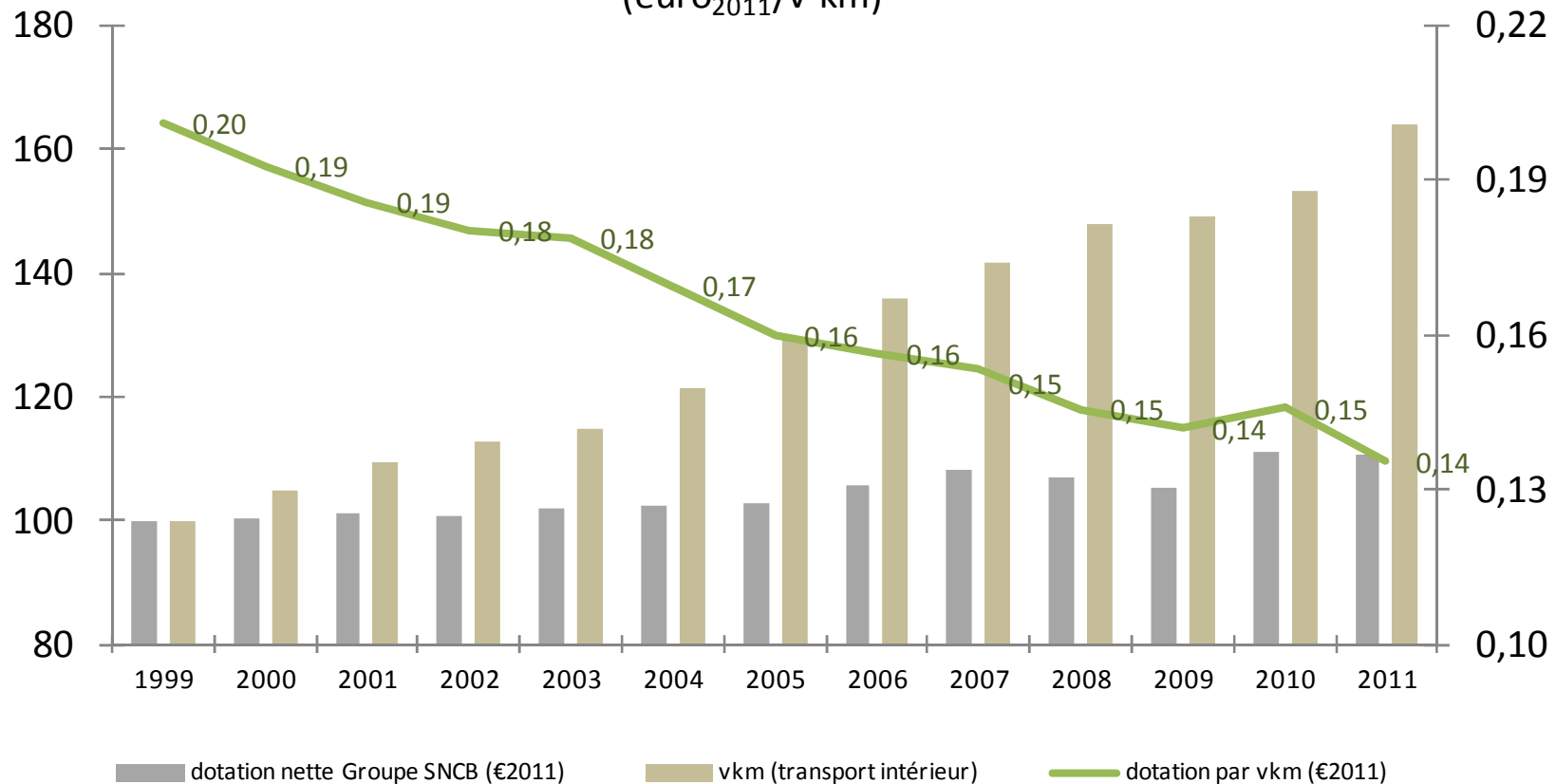
- Car and cycle parks management;
- Clean stations;
- Passenger information;
- Use of traffic control and signalling.

For a public service passenger to benefit from the reform, **the chain needs to take shape at the very heart of the public railway company** or the operator with the public service mandate. This will bring about improvements in punctuality and information, and an **optimal customer-orientated Operations management in general.**

# L'utilisation optimale des moyens publics: évolution du trafic voyageurs et des dotations d'exploitation du groupe SNCB



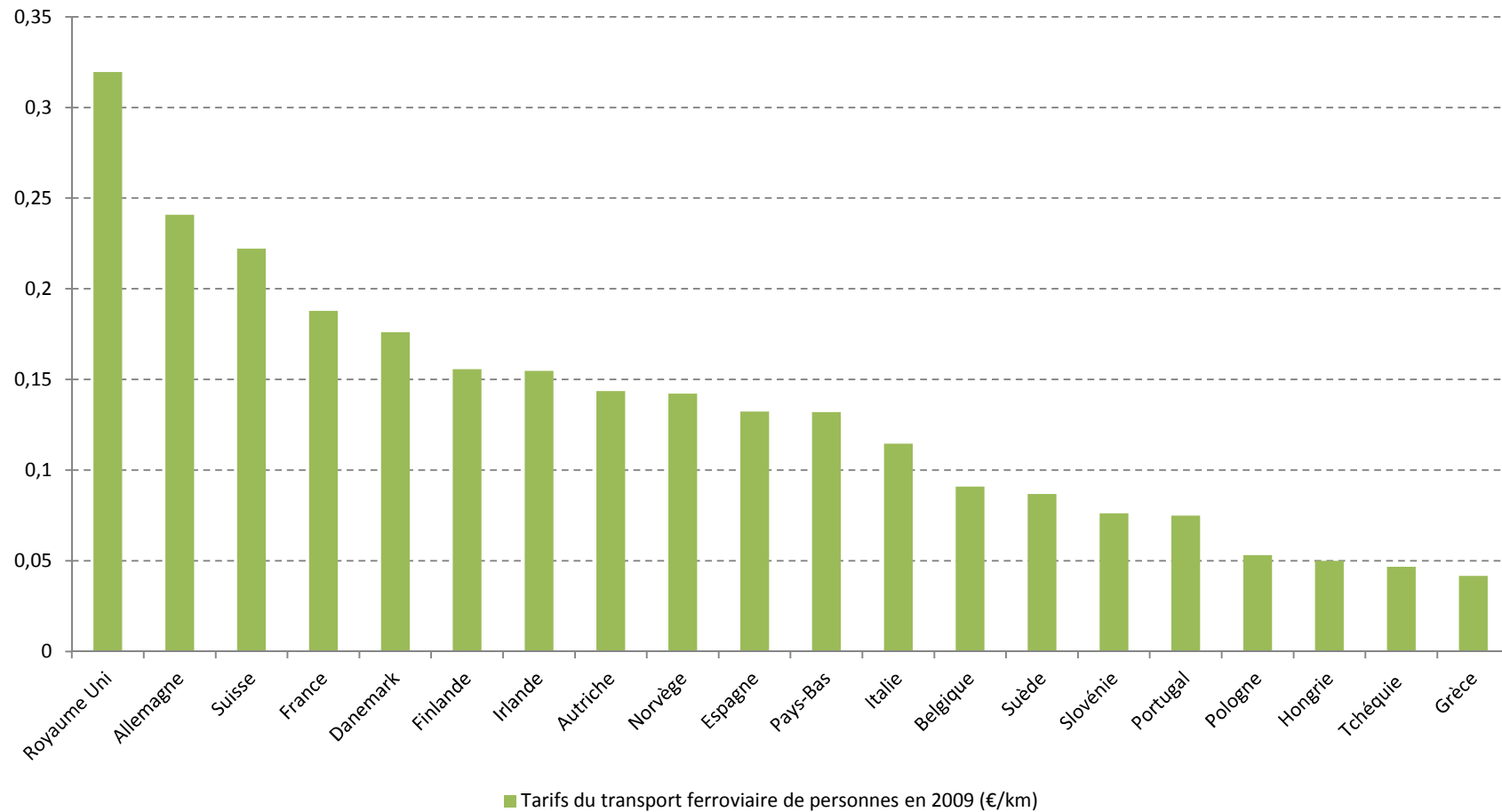
**Dotation d'exploitation par voyageur-km au niveau du Groupe**  
(euro<sub>2011</sub>/v-km)



# L'utilisation optimale des moyens publics: efficacité élevée = tarifs démocratiques ?



## Benchmarking européen des tarifs du transport ferroviaire de personnes



# The best value for money: public financing for the development of rail freight ?



## The UIRR's position on the development of rail freight

*“It's UIRR's conviction that discrimination free access should be made possible to any public-financing recipient terminal in a transparent way for every Combined transport operator. This can be easily achieved if terminals are required, as a prerequisite to obtaining their operating license, to prepare and publish a set of rules on access and applicable charges, in a similar fashion to a (simplified) Network Statement. The European legislator should require the Infrastructure Managers to publish on a monthly or quarterly basis the most relevant quality indicators referring to every category of train traffic performed on their network.”*

# Transparency of financial flows



- *“Truth never damages a cause that is just”,  
Mahatma Gandhi*
- Careful monitoring and good governance of all activities contributing to overall success
- Some activities generate **long-term recurring revenue**: the sale of advertising space, high-quality parking facilities, excess fibre optic capacity, commercial concessions, etc.

# Strong regulation, simplified governance



## Strong regulation

- Human and IT resources
- Settlement of disputes
- Regulators network/European regulator



## Stimulating tariffs : a part of regulation ?

- External body and internalization of external costs
- Single-tariff system for “customers” to encourage modal transfer?
- Financing of trans-regional and international interconnections



## Simplified governance

- From “my tracks, your trains”, to “our railways”
- One public service operator
- One management contract

# Le consensus social: la plus grande adhésion interne et externe



- Les premiers bambins dans la crèche de la gare de Liège-Guillemins: le renouveau sociétal ?
- Photo à insérer