



Impact assessment support study – Initiative on Multimodal Digital Mobility Services + SDBTR

1st Stakeholder Workshop, 22 January 2025

Agenda

Introduction to the study (10:30-10:45)

Project methodology (10:45-11:00)

Problem definition and policy objectives (11:00-12:00)

Stakeholder engagement programme (12:00-12:15)

Closing (12:15-12:30)

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Introduction to the study

Cross-border train travel is still too difficult for many citizens. People should be able to use open booking systems to purchase trans-European journeys with several providers, without losing their right to reimbursement or compensatory travel. To this end we will propose a Single Digital Booking and Ticketing Regulation, to **ensure that Europeans can buy one single ticket on one single platform and get passengers' rights for their whole trip.**

- A. Support the development of the **proposals for two parallel and complementary Regulations:**
- 1. Addressing MDMS platforms (including B2B),** in particular governing access for transport operators to distribution channels and fair display of offers to contribute to a better functioning of the market for multimodal digital mobility services
 - 2. Addressing rail transport operators,** to facilitate access by intermediaries to transport data and tickets, enhancing the attractiveness of transport.
- B. Ensure that the proposals are based on a **robust evidence base and analysis** consistent with the Better Regulation Guidelines - to contribute to a successful resubmission of the proposal to the Regulatory Scrutiny board.

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Voting procedure

- We will have a few questions for the audience later in the workshop
- To vote:
 - Go to **menti.com** (mobile is OK)
 - Use code: **6539 4066**
- You can go to the website already and start the process; please hold off from voting yet.

Project methodology

This delivery of the study includes nine tasks representing three distinct phases of an Impact Assessment – a design phase, an analytical phase and a synthesis phase – and two support tasks as summarised below:

Design Phase:

- Task 1: **Substantiating the problem** – Collect relevant evidence to substantiate the problem, its magnitude and its underlying drivers in terms of the operation of the MDMS market
- Task 2: Present an **analysis on causal links** between the problems and how the problem is expected to evolve
- Task 3: **Policy alternatives** - Definition of the policy measures and policy options to be considered

Analytical Phase:

- Task 4: **Baseline definition** - Identifying a baseline scenario including planned actions at the EU and MS level
- Task 5: **Assessment of the impacts** (economic, social and environmental) against the baseline using the ASTRA model for key benefits and three ad hoc modules for the development of the inputs to the model. Include qualitative assessments where quantification is not possible

Project methodology

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Synthesis Phase:

- Task 6: **Comparing the policy options** and summarising the results of the impact assessment in a standardised format
- Task 7: Selection of the **preferred option** and definition of a set of operational objectives to assess and monitor its performance

Support Tasks:

- Task 8: **Evidence collection** on a rolling basis, through:
 - Desk research (Task 8.1), reviewing studies, reports, statistics and other relevant materials
 - Field research (Task 8.2) - stakeholder consultation (targeted surveys, stakeholder interviews, data requests, stakeholder workshops) and the analysis of the Commission's Eurobarometer survey
- Task 9: Support the Commission in addressing the **comments from the Regulatory Scrutiny Board** following its submission

Project timing

- **Inception phase (December 2024 – February 2025)**
 - Draft problem definition
 - Initial list of measures
- **Analytical phase (March-April 2025)**
 - Problem definition (final)
 - Baseline development
 - Policy measures/options (final)
- **Assessment of impacts (May-July 2025)**
 - Impact assessment (incl. modelling of options)
 - Comparison of options
- **Stakeholder consultation (throughout the study, focus on Q1/Q2 2025)**
 - Survey
 - Interviews
 - Workshops
 - Data requests

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Problem definition

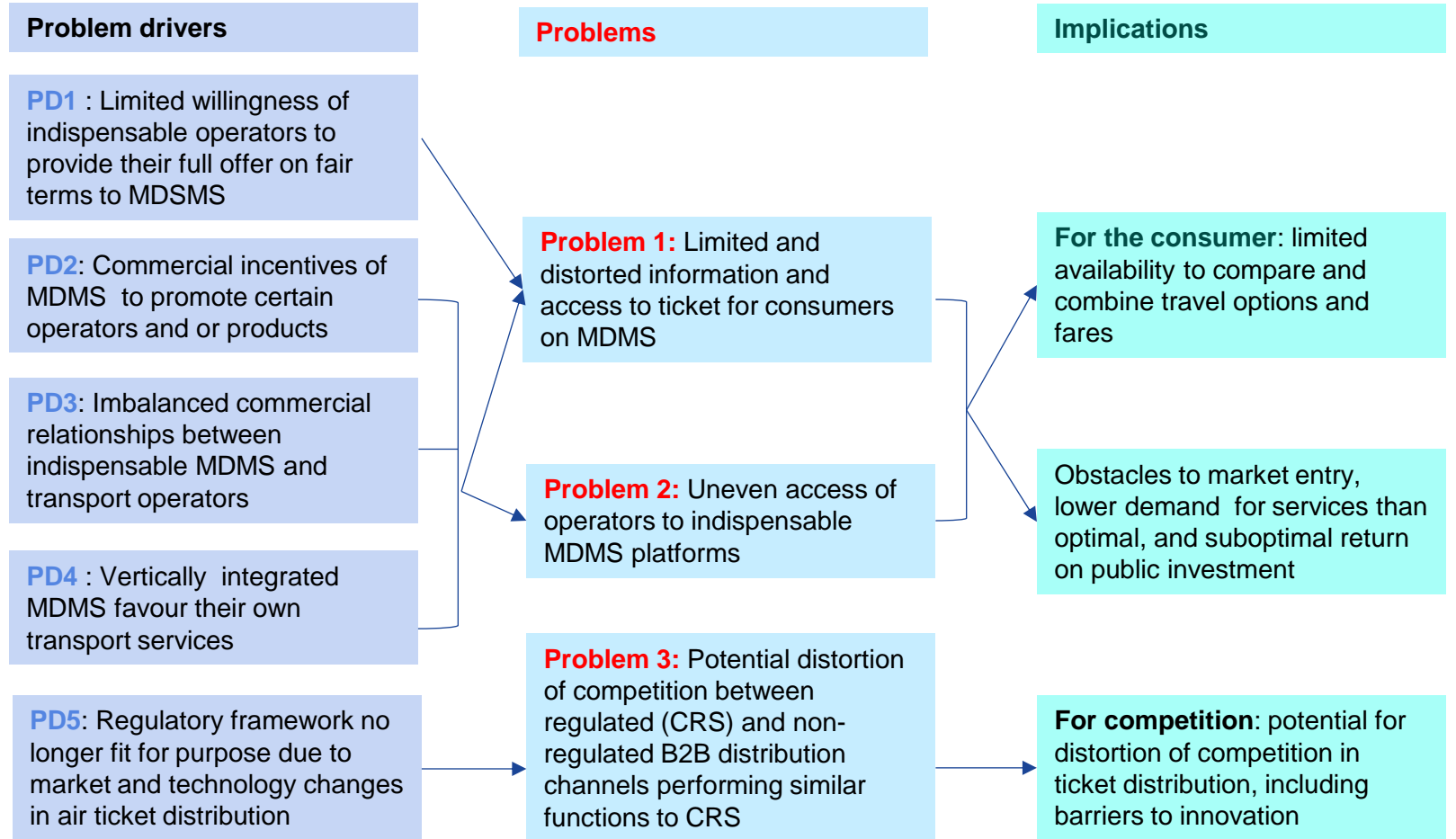
Problem diagram

Use inputs from desk research and stakeholder consultation to

- Substantiate; and
- Update (where necessary)

the problem definition responding to the questions:

1. **What is the problem** and what are its consequences?
2. What is the **size of the problem** and its EU dimension?
3. What are its **drivers** and how important they are?
4. Who are the **relevant stakeholders**, including those that may cause the problem and those affected?



Problem definition

Market analysis on multi-modal and multi-operator mobility

Demand side: existing and potential demand for the use of MDMS services vis-à-vis car or airplane journey alternatives.

Passenger willingness to make alternative travel choices through the results of the **2024 Eurobarometer MDMS survey** complemented with other desk and field research activities

Supply side: presence, practical availability and accessibility of options across the EU with relevant, comprehensive and comparable information on transport options to inform passenger modal choice.

This will be based on the analysis of set of **100 representative routes** selected following a step approach (in the absence of a comprehensive dataset of OD routes across Europe that covers all modes):

Policy objectives

Analysis of causal links and evolution of the problem

- Corroborate the **causal links** between the different aspects of the problem and their consequences.
 - Also assessing changes from previous support studies.
- Assess whether the **problem** is expected to **persist** and how it may **evolve**.
 - Account for identified market and technology trends and policy developments.

Policy objectives

General objectives (GO)

GO1: Better functioning of the MDMS market

GO2: Enhance attractiveness and increase the sustainability of the transport system

Specific objectives (SO)

SO1: Improve completeness and transparency of information on MDMS, particular for the purchase of public transport tickets.

SO2: Establish a level playing field for transport operators in terms of access to and use of indispensable MDMS.

SO3: Prevent distortion of competition between MDMS.

Mentimeter results

Questions asked

- **Q1:** Do you agree with problems identified?
- **Q2:** Do you agree that the Problem Drivers (PD1, PD2, PD3 and PD4) sufficiently identify the causes that lead to **Problem 1: Limited and distorted information and access to tickets for consumers on MDMS?**
- **Q3:** Do you agree that the Problem Drivers (PD2, PD3 and PD4) sufficiently identify the causes that lead to **Problem 2: Uneven access of operators to indispensable MDMS platforms?**
- **Q4:** Do you agree that the Problem Driver (PD5) sufficiently identifies the causes that lead to **Problem 3: Potential distortion of competition between regulated (CRS) and non-regulated B2B distribution channels performing similar functions ?**
- **Q5:** Looking ahead, **how would you expect the specified problems to evolve** without further EU action?

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Stakeholder engagement programme

○ **Targeted survey:**

- Single survey, with sections tailored to different stakeholders
- Focus on substantiating the problem, the problem definition, the potential policy measures, baseline and impacts
- Live from mid-February until late March

○ **Targeted interviews:**

- Complement the survey by exploring issues in more depth, particularly in relation to information on costs
- Undertaken from late February until early April

○ **Three workshops:**

- First workshop (today - 22 January 2025) to inform stakeholders of the project, to present and discuss the problem definition and policy objectives
- Second workshop (March 2025) to seek feedback on the proposed policy measures; discuss and inform baseline and impacts
- Third workshop (May 2025) to validate the draft findings of the study

○ **Ad hoc data requests:** Used to follow up on outstanding queries from other consultation activities and to fill outstanding gaps

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Thank you

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