



International experiences on public transport provision in rural areas

Executive Summary



Case-Specific Policy Analysis

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INTERNATIONAL TRANSPORT FORUM

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Acknowledgement

The Finnish Ministry of Transport and Communications requested that the International Transport Forum at the OECD carry out a consultation to better understand international experiences on containing the rise in costs associated with public transport service provision in rural areas, to showcase examples of efficient solutions, and to illustrate new ways of organising public transport services.

The International Transport Forum at the OECD provides a platform for Member governments to exchange experience on the development of key policies with the aim of enhancing the performance and sustainability of transport systems and their contribution to economic growth and social welfare. Cooperation includes collaborative projects to review good practice, research on innovative policies, international benchmarking of performance and peer reviews of national policies in critical sector. The present report is part of the program strengthening the development of policy-making in key sectors of Member country governments under the current program of work. International Transport Forum at the OECD is well positioned to carry out this consultation for the Finnish Government.

The report summarises international experiences in providing public transport services in rural areas and is prepared by Jari Kauppila of the International Transport Forum. Professor Peter White, Dr Merethe Dotterud Leren, Dr Kare Skollerud and Dr Christophe Saroli authored individual reports on country experiences and supported the preparations of the final conclusions. Dr Masanori Kennai has provided the case studies presented in the Annex. Preliminary conclusions were presented for the Finnish Parliamentary Transport Committee on 2nd October 2014 and findings in the report benefitted from these discussions.

Policy insights

We are currently seeing a major change in the perception of ‘public transport’. Development of open data and mobile information platforms are changing the way consumers conceive public transport services. Car-sharing and ride-sharing have gained ground in recent years and are being considered as real options for public transport service provision. Also new actors and innovative services are accessing the public transport market. Current legislation needs to be reconsidered in the light of these new services, enabling innovation while ensuring privacy and safety, among others.

Demand-responsive transport is seen as one of the key options to meet public transport challenges in rural areas. Demand-responsive transport is considered particularly suitable for rural areas because of its flexibility, and ability to adapt to local needs. While on cost per trip basis it may be more expensive than ‘conventional’ public transport, experiences indicate a willingness for both car users and existing bus users to use these services at a higher fare than existing bus fares. However, demand-responsive services should be part of a broader, multimodal package of solutions, supplementing regular public transport services.

Significant scope still exists for ‘conventional’ public transport. International experiences show that improving service quality, marketing and information provision can increase number of passengers and reinforce the commercial viability of the industry. Conventional public transport is not suited for all links and public transport provision in rural areas should be part of a broader transport strategy, integrated with local or regional transport plans. It is important to identify publicly funded minimum service levels regionally and locally. New forms of services should complement the conventional transport providing feeder traffic to strategically defined critical links.

Better coordination between different types of services is required. This includes pooling of passengers, opening up special transport services to public and common planning and purchasing of publicly funded transport services. Transport services are currently administered, purchased and financed by several different authorities. There is a significant potential for savings and economies of scale through better coordination of these transport services, enabling also a more efficient use of the existing vehicle capacity.

Relaxing quantitative taxi regulation can enable new innovative solutions. Taxis are an important complement to regular scheduled public transport services in many countries. International evidence suggests that restricting taxi numbers through quantitative regulation constitutes an unnecessary restriction on competition and reduces economic welfare. Removing supply restrictions have resulted in increased taxi numbers, reduced prices and reduced waiting times while also enabled a number of new, innovative, services to develop.

Executive Summary

Challenges in public transport provision for rural areas are similar across countries

International experiences on providing public transport services for rural and sparsely populated areas are similar around the world. Countries are witnessing a falling share of public transport as a consequence of increasing role of private car in meeting accessibility needs. Low and dispersed population combined with strong competition from private cars make it difficult to operate profitable commercial public transport services, leading also to higher unit costs for providing these services. Ageing societies and increasing population concentration in cities are further contributing to an increase in the unit cost of providing public transport services. Rising operating costs for bus services and constraints of public funding have eroded the ability of local authorities to subsidise public transport at previous service levels. This has led to a vicious circle of increasing fares, increasing subsidies or cutting back the existing services levels.

In rural areas, it is difficult for conventional public transport to meet different accessibility needs of different user groups. Authorities responsible for transport typically cover a wide mix of population sizes and densities. Further, many different authorities are responsible for the administration, procurement and planning of various passenger transport services. This has led to concerns over increasing costs and attempts to increase coordination among different authorities in order to gain savings. This combined with lack of funding under the stringent economic conditions have led several countries to look at alternatives for public transport provision. Indeed, the application of global access to public transport services has proven difficult in rural areas.

Despite being one of the most sparsely populated countries, Finland is not an exception in terms of challenges with public transport provision. Several countries have extremely sparsely populated regions, including several states in the United States. Publicly funded transport services are also very similar across countries. The right to transport is generally included in the national legislation, with this right enabling users to travel in reasonable conditions in terms of access, quality, and price. Further, in the EU area, bus transport services are organized under the Public Service Obligation (PSO) regulation of the European Union which also sets common rules for the procurement of these services.

There is a need to find alternative transport supply solutions to address these changing mobility issues. One single approach is not sufficient but a broader range of solutions are needed, including innovative transport services. This accentuates the need for introducing changes to existing transport policies. This has also increased the need to introduce new, flexible, transport solutions such as demand-responsive transport (DRT).

New ways for information provision are changing the public transport market

New mobility concepts and smart solutions offer new transport services for passengers. The technological development in telecommunications and the development of mobile information platforms are changing the way consumers conceive public transport services. Consolidated mobile applications

provide access to information and mobility services which allow for the development of new collective and personalised services, better suited to the individual needs. New data and, more importantly, availability of these data are indeed changing the public transport market. New patterns of daytime travel and activity are increasingly developing within the community. These phenomena are radically changing mobility patterns, and pose new questions for transport, which must be properly addressed in order for the digital economy to bring real benefits to the citizens.

Mobile phone applications have changed consumer expectations and behaviour. These applications have been created out of user needs and are central as they give visibility to all the existing mobility services, allowing for consumers to choose the ones best fitting for their heterogeneous needs. This has also been an impetus for new actors and innovative services accessing the public transport and taxi markets (e.g. “KutsuPlus”, “Bridj”, “Uber”, “Olacab”, “Lyft”). However, current legislation for public transport provision has in many cases been created before smartphones were commonplace. This in turn has created a much needed discussion on the need of change in legislation and current practices.

There is a continuous need to assess the level of required transport service and trends in passenger needs. “Big data” holds much promise for improving the planning and management of transport activity by radically increasing the amount or near-real-time availability of mobility-related data. Transport authorities will need to ensure an adequate level of data literacy for handling new streams of data and novel data types. Traffic operations, transport planning and safety are areas where authorities must critically evaluate where and how new, or newly available data and data-related insights, can improve policy.

“Big data” can help governments, businesses and individuals to make more informed decisions. Better data can help transport authorities to understand commuters’ behaviour, provide targeted information and identify policy interventions. In fact, the biggest gains from using big data may come from changing user behaviour. From the government perspective, there is need for better data to support decision-making, at least for the following purposes:

1. Understanding better the demand (needs by different user groups);
2. Better planning of services to match user needs; and
3. To make the market case for privately operated services (profitability).

The concept of public transport needs to be revisited: importance of car- and ride-sharing

Mobility choices, including car ownership and use, appear to be changing. The growth in passenger vehicle travel has stopped or turned negative in several high-income economies (ITF/OECD, 2015). Car use per capita, especially among young adults, has declined and there is established evidence of a decline in the average rate of driver’s license holding, again particularly among young people. However, people living in less populated areas are more likely to hold a driver’s licence than those who live in urban areas. For example, in Stockholm only 10% of 18 year-old persons have a driver’s licence, while this figure is closer to 50% in more rural areas (see for example Aretun & Nordbakke, 2014). Several explanations for this phenomenon have been put forward including attitudinal and lifestyle changes and unfavourable economic conditions.

However, a more relevant explanation is related to increased transport alternatives and options for delivering mobility needs. Overall, international experiences show that we are currently seeing a major change in the perception of the concept “public transport”. Users are moving from the ownership of the vehicle to consider the car as a service. A typical car lies unused for approximately 23 hours a day. This represents a tremendous investment in overcapacity – both for car owners and for the public authorities that provide and maintain public infrastructure.

Car-sharing and ride-sharing have gained ground in recent years, especially in urban areas, and have seen a tremendous influx of new, sometimes well-capitalised entrants. The rapid growth of new service providers, such as car-sharing services (e.g. "Car2go", "Zipcar", "AutoLib") and ride-sharing ("Blablacar", "Liftshare") signals the growing importance of these services. For instance, Autolib, an electric car sharing service in use in Paris, France, has today around 130 000 registered users with around 10 000 individual uses per day.

While ride-sharing is not a new concept, it has found renewed popularity in some countries, spurred by new information and communications technologies. It is considered a real alternative to provide accessibility and mobility to citizens in sparsely populated areas. For example, the French government is actively encouraging the use of ride-sharing and is looking at policies and actions for ride-sharing to reach a critical mass which would increase the chances of finding suitable itineraries for users. Indeed, carpooling has become increasingly popular. It has significant potential and many local carpooling schemes and public initiatives to support the practice have been implemented in France. Carpooling offers a real growth potential, as a form of mobility without significant cost to the public (Saroli, 2015).

It is important to note that rural transport provision is not necessarily only a task for the public sector. Volunteer-driven minibuses have also been emerging as a solution for rural areas but they are not necessarily comprehensive in their coverage. Voluntary approaches are often constrained by lack of sufficient number of volunteers to cover broader areas and services. However, voluntary approaches have been relatively successful in Japan, for example, where a tradition of volunteer work is strong.

An important prerequisite for the development of new ride-sharing services is the removal of constraints on permitting coverage of costs incurred by those providing the service through fees charged to the users of those services. Ride-sharing schemes may provide a fairly comprehensive service for different trip-purposes. Similarly to volunteer-driven services, the challenge is to maintain sufficient pool of volunteers/drivers to secure adequate service levels.

Demand-responsive transport is seen as one of the key options to meet future public transport challenges

The development and operation of demand-responsive transport (DRT) has raised renewed interest in the last few years and is identified as one of the options to meet future access requirements and associated public transport challenges. DRT systems have been stimulated particularly by improvements in route planning software and new ways of information provision, enabling more efficient planning of journeys in response to users' needs.

Demand-responsive transport is attracting a great deal of interest among local authorities as an alternative transport solution for providing cost-effective public transport. DRT is considered particularly suitable for rural areas because of its flexibility, and ability to adapt to local needs. There are in principle two ways of organising demand-responsive transport: door-to-door or predefined pick up and drop off points both with service provided only if there is demand. DRT systems provide flexible services which involve adapting collective transport to the actual need of the customers: the routes travelled by buses, the stops reached and the timing of the service is flexibly adapted based on passengers demand.

These forms of transport usually serve dispersed mobility needs, either during hours of low demand, in areas of low population, or where the target users are dispersed among the general population (e.g. disabled and elderly, students, tourists). As an important element of a larger intermodal service chain, DRT can provide both local mobility, as well as connections to other conventional forms of transportation (e.g. regular bus network, railway services).

Emphasis should be placed on preliminary research and studies. These are crucial for correctly assessing the potential demand and the type of service required. DRT must also be developed in consultation with users and the success is dependent on the involvement of local community.

Central government may initiate innovations through centrally-funded programs. Considerable innovations have been produced by this type of initiative. For example, the Norwegian government introduced grant to stimulate innovations to improve coordination of resources. Regions had the opportunity to introduce projects with state support as an addition to funds from regional authorities. However, it is also important to ensure that funding for innovative solutions are “one-off” not to distort markets or create “subsidised” services. Further, measures should be transferrable to other areas.

Evidence from Norway suggests that the characteristics of a typical user of DRT is that someone who does not own a car or have a driver’s license. Interestingly, DRT is also valued by parents owing a car as it relieves them from having to drive their children to activities. More generally, younger users of DRT use it for participating sports activities or visiting friends (often in the evenings). In Norway, sports teams have adapted their schedules to fit the transport offer. Elderly customers use DRT for accessing medical services, shopping and some social activities (mostly in the morning). Most of the users, according to the Norwegian follow-up study, were satisfied with the services offered. Furthermore, DRT services were considered as supplements to other public transport services and private transport (Dotterud Leren and Skollerud, 2015).

Experiences indicate a willingness for both car users and existing bus users to use DRT services at a higher fare than existing bus fares. There is a potential new market for DRT in railway station and airport access, workplaces outside the urban areas and an integrated DRT supply for the general public.

However, unit costs per trip (and public expenditure) may be high. DRT may enable a planning objective to be achieved more readily within a given budget but with a high per trip cost. Density of demand will affect unit costs. Demand-responsive and taxi-based modes may be more expensive than a supported bus service. The following table provides a useful comparison of costs per passenger trip as related to density of demand.

Table. **Indicative guidance for vehicle choice related to demand**

Trips per vehicle hour x trip length [i.e. passenger-km per vehicle-hour]	Suggested vehicle choice
Less than 10	Taxi
Between 10 and 20	Taxi(s) or flexible minibus – choice will depend on availability and relative costs locally
Between 20 and 50	Flexible minibus, with lower degree of route flexibility at the higher end of the range
Greater than 50	Largely fixed route bus, with limited deviations

Source: Adapted from Wright (2013).

Significant scope still exists for ‘conventional’ public transport

New forms of public transport provision do not diminish the importance of ‘conventional’ public transport. Demand-responsive transport alone will not fulfil all public transport needs in rural areas. DRT should be a part of a broader, multimodal package of solutions, supplementing regular public transport services. Demand-responsive transport services should be seen as complementary to the conventional, scheduled passenger transport, based on large buses, trams and regional trains. DRT, on the other hand, is normally provided by smaller buses, minibuses, vans, taxis and cars.

‘Conventional’ public transport has an important role in providing accessibility in many regions. There is scope for adopting better marketing and service quality improvements to stimulate use, as well as for reducing costs. While not necessarily always suited to the lowest-density flows, such scope should be explored as well as pursuing alternative options.

One solution is to improve service quality and supply. While the number of passengers has generally declined for ‘conventional’ public transport, international experiences show that new marketing concepts and innovative product developments can increase the number of passengers and reinforce the commercial viability of the industry. Types of improvements include higher service levels (for example through increasing comfort by reducing seating density) and using smaller vehicles or simply better marketing and information provision and focus on service reliability (for example through providing real-time travel information with mobile applications). Some of these experiences have been successful and resulted in improved frequencies and connections in rural areas (see for example White, 2015).

Some of the most successful experiences have been based on local solutions. Identifying service levels based on customer needs helps designing the supply to meet the actual demand. Customer based planning (at the level of municipalities or individuals) and involving the community has resulted in a revitalisation of several public transport services in Japan (ITPS, 2011) and has resulted in increased number of users. In Japan, the public transport revitalisation act of 2007 put municipalities in the forefront of tackling rural transport needs. Municipalities were encouraged to play a central role in the formulation of regional public transport plans. In some cases, also the private sector (local business) has been involved in designing the routes as well as financing initiatives in cooperation with local authorities. Indeed, putting customers at the heart of solutions is a key.

Transport provision in rural or sparsely populated areas should be part of a broader transport strategy, with links to local or regional transport plans. While conventional public transport is not suited for all links, it is important to identify critical links (minimum service levels) regionally and locally. New forms of services should complement the conventional transport providing feeder traffic to critical links. For example, publicly funded transport services should not necessarily provide direct access from a rural area to city centres but to the closest travel centres or a collection point.

Better coordination between different types of services is required to increase efficiency

Transport services are administered, purchased and financed by different authorities. There is a significant potential for savings and economies of scale through coordination of special transport services by:

- Pooling of passengers.
- Opening up special transport services to public.
- Common planning and purchasing.

There is certainly a need for a better coordination of transport services in rural areas. This may imply coordinating different types of transport services provided by public authorities. Coordination of public transport services, especially special transport services, provides several efficiency gains through grouping passengers together, improving the utilisation of existing vehicle stock and more generally through economies of scale. Since different authorities contract with different companies this limits the ability to coordinate. In addition to institutional barriers to better coordination, different management systems and concerns regarding rights of certain user groups are limiting possibilities for improved efficiency.

Experiences show there are significant benefits to gain. In Denmark, municipalities have achieved considerable savings by cooperating in service provision through an inter-municipal transport company.

Deloitte (2012) has estimated that there are substantial economies of scale and Danish municipalities could achieve savings of between 5-10% through coordinated and common planning and purchasing.

Better coordination could potentially also result in a more efficient use of the existing vehicle fleet as same vehicle is in use throughout the day for different types of services. Indeed, sufficient vehicle capacity is often available to provide public transport services but it is not necessarily utilised effectively. Smaller vehicles could be utilised better (for example taxi-buses) or the same vehicle could be in more effective use throughout the day.

Improved coordination may also involve opening up the special transport services (such as provided for special rights groups) to all citizens or pooling passengers to travel together. This may be a challenge as it can be considered as a decrease in the service level for those who previously enjoyed privileged services.

Today freight, mail and passengers are moving separately. In areas of particularly low density population, combining transport services primarily provided for other purposes with passenger transport services can be an attractive option. In some countries the postal service operator is also a major bus operator. Combining postal services with passenger transport might be appropriate especially in cases where population is aligned on a linear corridor. In the United Kingdom, some experiments were made on postbus operation, where minibus replaced mail vans on routes connecting local sorting centres and collection points (White, 2011). While most of these services have now ceased in the UK, they might provide alternative options for demand-responsive transport.

New concepts will not remove the need for public funding for core services in many rural areas - but they can stop the increase in unit costs for providing those services. Sustainability of funding is still a key to support economic activity and promote social equity also in rural areas. Current legislation needs to be reconsidered in the light of the birth of new services, enabling innovation while also ensuring safety and security. Importance of aligning other legislation should be highlighted. Flexibility in school and work hours, including, teleworking, can help in aligning user needs and availability of transport services.

Quantitative taxi regulation constitutes an unnecessary restriction on competition and reduces economic welfare

Taxis are an important complement to regular scheduled public transport services in many countries. They also form a substantial part of total public transport market, especially in terms of turnover. Taxi services are particularly valuable to less mobile groups in the community, such as elderly and disabled people and citizens living in rural areas. Indeed, taxis are often used as means to travel for special (such as health care) purposes complementing other public transport services. It is important that such services are efficiently provided, meet users' needs and are priced correctly.

The question of taxi (de)regulation is therefore highly relevant for the discussion regarding public transport provision in rural areas. Politically, taxi regulation is often a difficult topic due to relatively high negotiation power of the industry compared with the taxi customers who often are not represented by one common entity.

Entry restrictions have been a key component of the regulatory regimes in several countries. However, international evidence suggests that restricting taxi numbers through quantitative regulation constitutes an unnecessary restriction on competition and reduces economic welfare (see for example OECD, 2007; ECMT, 2007). On the contrary, there is evidence that removing supply restrictions have resulted in increased taxi numbers, reduced prices and reduced waiting times. But particular attention must be given to transition arrangements when taxi licenses ("medallions") were traded, often at quite high costs, as a necessary condition to have access to the market.

However, quantity and quality regulation should be clearly distinguished. There is a clear case for maintaining quality regulation in the taxi industry, including vehicle standards, requirements for driver training, safety and minimum service standards. These qualitative regulations should, however, be designed carefully to enable development of innovative services and market structures that benefit from reforms. In addition, evidence suggests there may be need for price regulation, for example in the form of maximum or minimum prices (see OECD, 2007). Moreover, if all taxi services are tracked by cloud-based applications, it could be easy for a regulator to regularly assess quality of service in a number of dimensions, as well as to have plenty of information to make an assessment of any specific complaint.

A particular aspect of the taxi market is the requirement to provide emergency preparedness on 24 hour basis, especially in rural areas. Overall, taxi service supply in rural areas is low, reflecting lack of commercially-viable operation. Especially in rural areas, taxi industry depends on reimbursement of public transport services in order to maintain sufficient income. Experience of deregulation in Sweden in 1990 suggested there was little effective competition in rural areas, suggesting a competitive bidding would be of benefit to public authorities. This is often presented as an argument for restricting competition. However, a counterargument can be put forward. The existence of only relatively few operators may have hindered further development of innovative new services. Furthermore, other ways of providing these services should be explored while other actors could access the market to stimulate new services (such as railways to improve feeder service to stations). Indeed, there is international evidence that the removal of quantitative restrictions has enabled a number of new, innovative, services to develop (such as shared taxis and taxibus operations in the United Kingdom after the reforms under the Transport Act 1985).

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Mobility is one of the key elements that supports economic activity and promotes social equity. With decreasing population in rural areas and ageing society it is becoming increasingly difficult, however, to provide access to adequate transport services for citizens in rural areas without significant cost increases.

This report summarises experiences with public transport service provision in rural areas for the United Kingdom, Norway, France, Japan and Finland. It provides key policy insights for efficient solutions and new ways of organising services.

The report on which this summary is based is part of the International Transport Forum's Case-Specific Policy Analysis (CSPA) series. These are topical studies on specific transport policy issues of concern to a country carried out by ITF on request.

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