

#### Transmodel, NeTEx & UK Transport data

London 13th May, , 2019





## What is NeTEx?



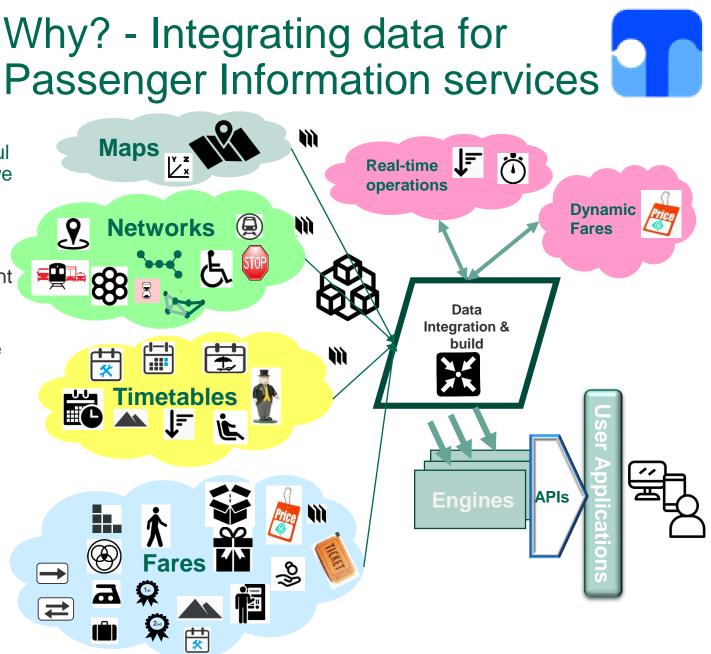
- A CEN standard format for the exchange of PT data for Passenger Information
  - Networks, Timetables, Fares
- Based on CEN Transmodel conceptual model for PT data (NeTEx is a subset)
  - Concepts evolved over 20 years from real PT systems across Europe. (Now on Version 6.0)
  - Now mandated for widespread EU use

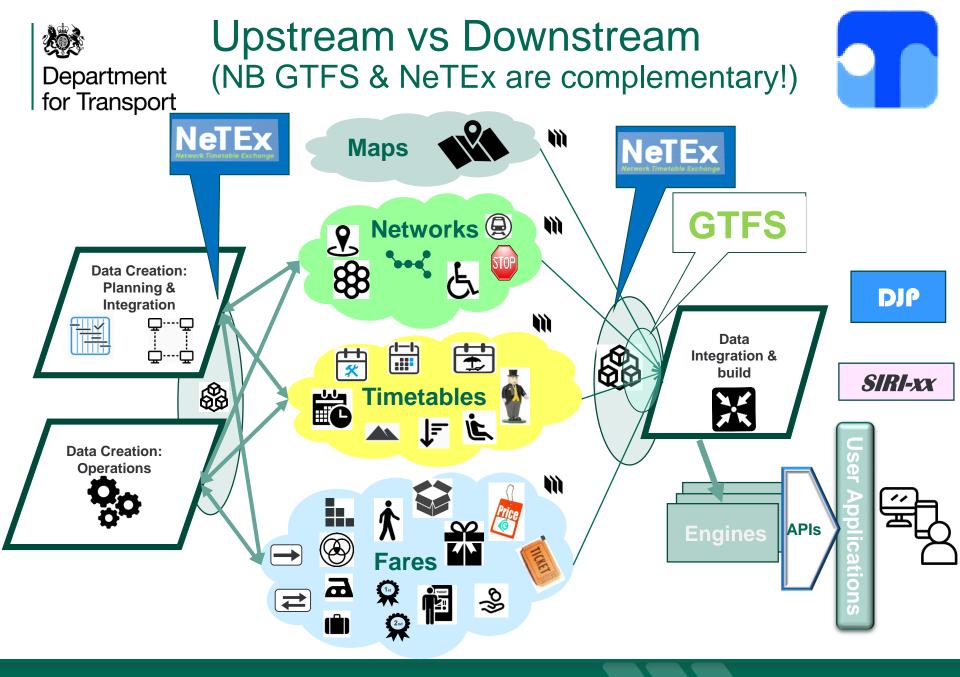


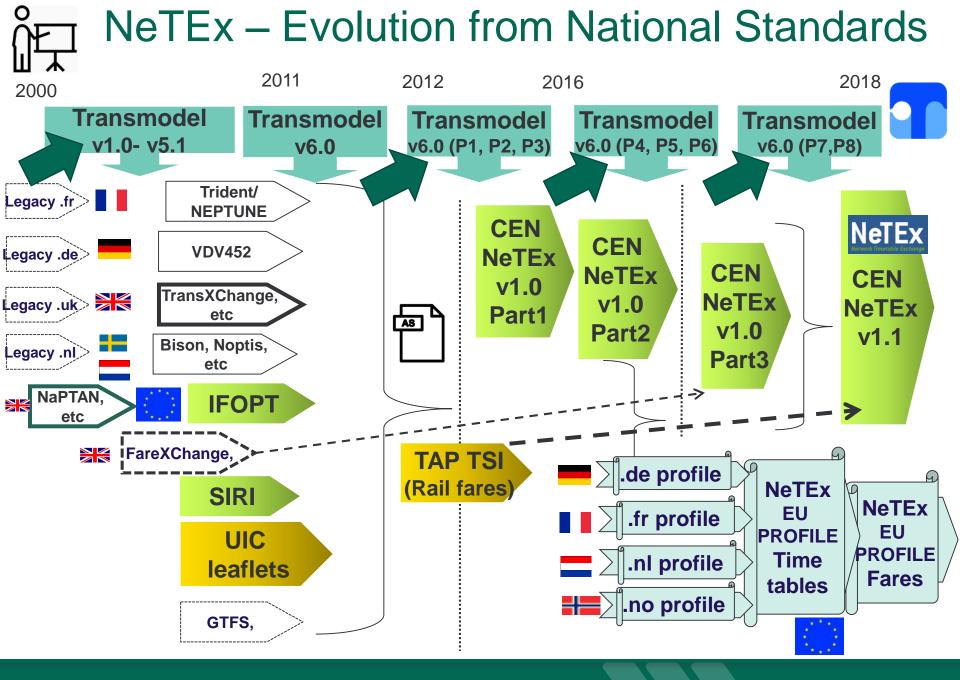
- Uses a modular XML schema
  - Model driven design from conceptual model in UML
  - Free to use under a GPL License



- In order to create useful information services, we need to integrate data
  - of many different types...
  - from many different providers...
  - that changes constantly – some of it in real-time
- This needs to be done
  - Precisely...
  - Repeatedly..
  - Cheaply...
  - Scaleably







## Coherent standards give Interoperability - The "Transmodel ecosystem"

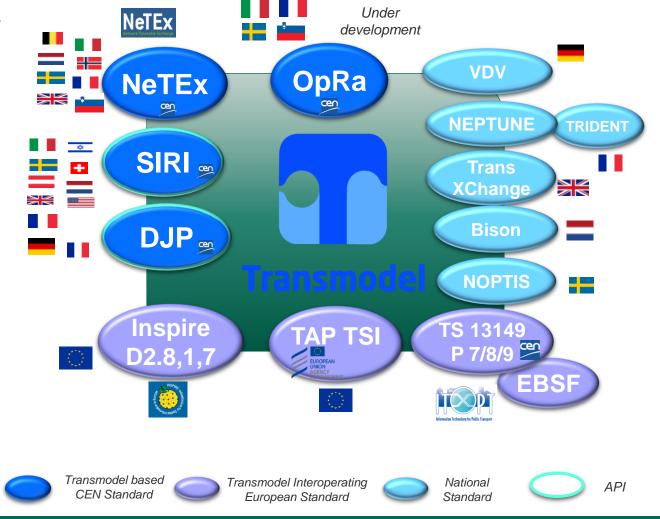
- Complementary formats & protocols:
  - Bulk exchange of static data (NeTEx)
  - Dynamic APIs for data (SIRI, DJP)
- Flexibility: adaptations to local needs
  - National Standards & profiles
- Coherent "Bridges" to standards for other domains

GIS – eg Inspire

Road – Eg DATEx

Flags Indicative.

not Exhaustive

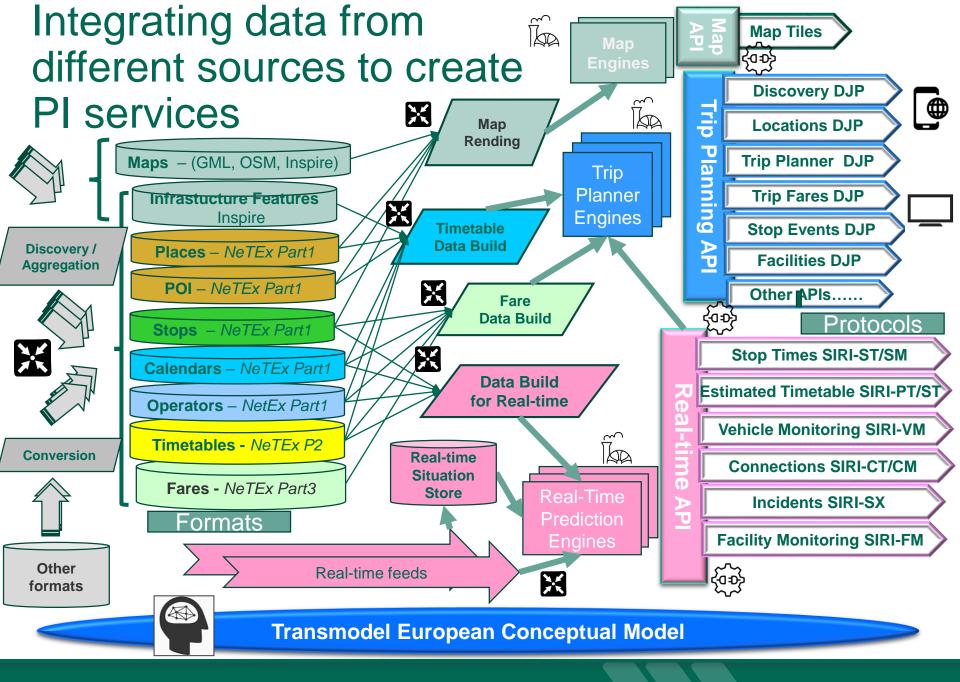


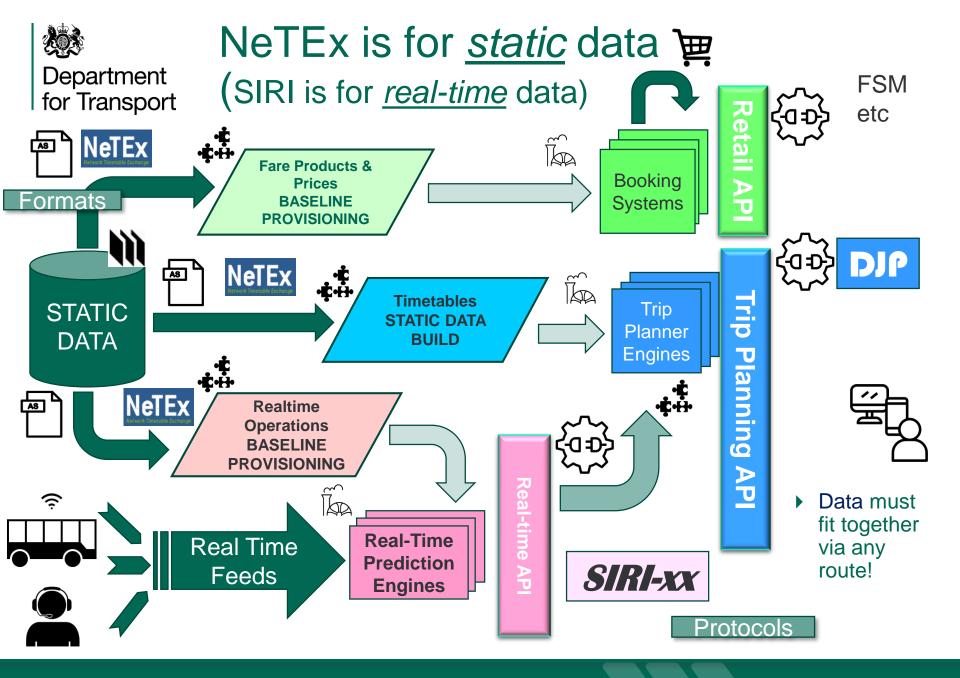
#### 6 NeTEx UK Fare Profile - Introduction

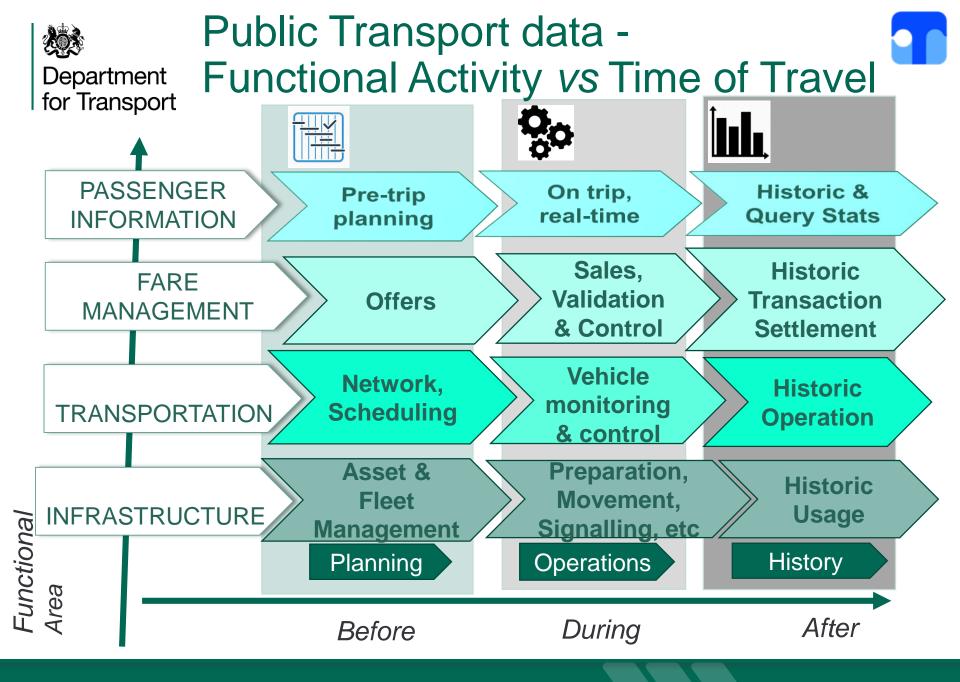


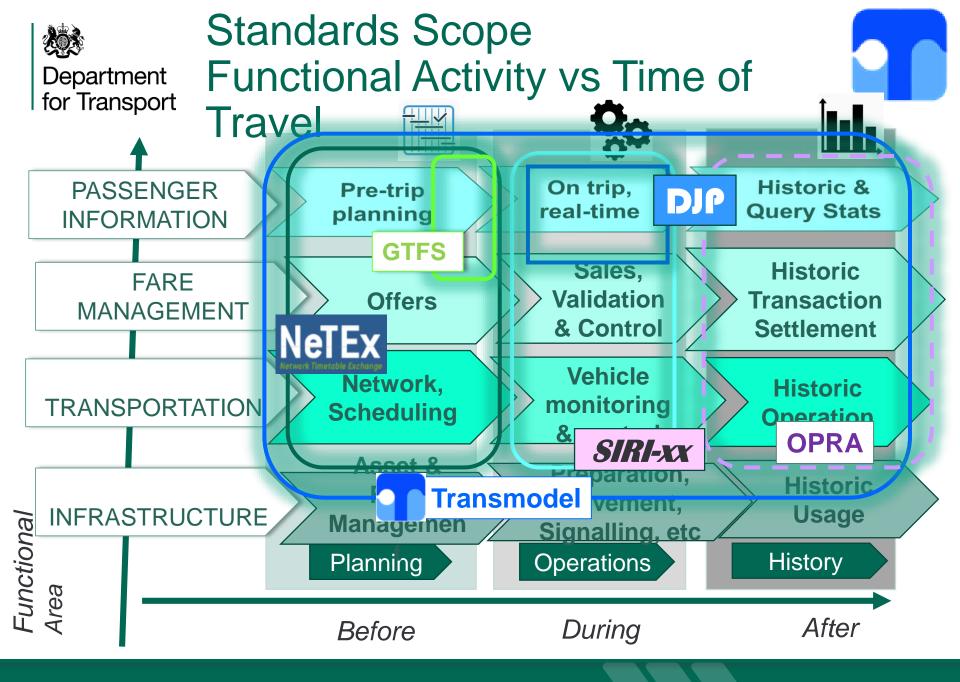
 Transmodel gives us a conceptual too for comparing, integrating, harmonising and evolving PT data standards

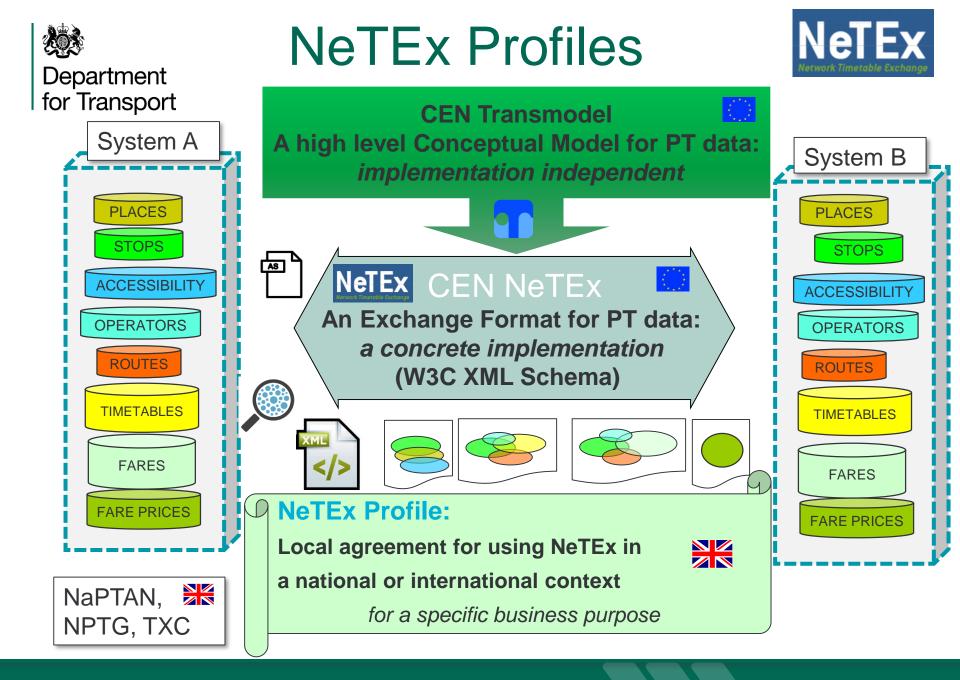
















Department for Transport

## Aspects of a NeTEx Profile



#### Profile - Scope?

- Relevant subset of NeTEx data elements for specific local business requirements.
- Mapping of legacy data elements to NeTEx.

#### Profile - Local Technical Details?

- Use of identifiers & codespaces.
- Use of coordinate systems (O/S, WGS85..), Time zones, etc.

#### Profile - Use in National Context

- Granularity of NeTEx data files
- Participants & Workflow of data exchange
- Validation & Verification processes

#### Profile Management

- Stakeholders?
- Governance processes for future evolution



Department for Transport







- Open review and voting process
  - Need 5 countries to create a new Work Item
- Multi-country review organised through National Standards Bodies
  - British Standards Institute + Mirror bodies (e.g., PTIC)

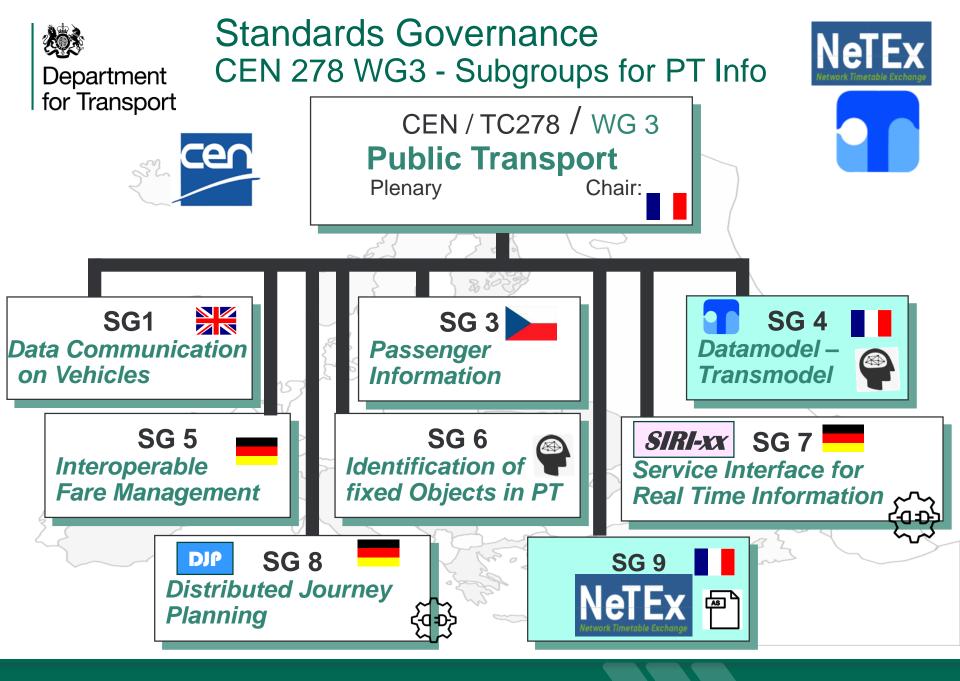


- BREXIT: "The British Standards Institution (BSI) will still be a voting member of CEN, like other European Free Trade Association (EFTA) members, and there is no suggestion this will change".
- Attention to existing Standards
  - Where available, reuse
- Lifecycle management
  - Standards must be completed and reviewed to set timescales



∎∔

- Different tracks for new / mature areas:
  - ► Technical Specification → Full Specification







## • UK Profile(s)

- Basic Timetable, Basic Fares:
- Additional Fares
- Full Timetable,
- UML Models of Profile. £ Free, GPL
  - Conceptual, Physical
  - XML Examples (Modular). £ Free, GPL
    - Fares





## **Key Strategic Issues**

- Keeping a UK presence in the relevant TC 278 WGs
  - WG3 SG4 Transmodel (Also SG6 IFOPT)
  - WG3 SG9 NeTEx
  - ▶ WG3 SG7 Siri (Tim Rivett)
- Participation in NeTEx support program PT.
- Building UK IT/PT skills in NeTEx
- Developing a joined up strategy for UK open PT data with key stakeholders
  - > Operators, Authorities, traveline, DFT, etc, data consumers





## The Transmodel / NeTEx approach

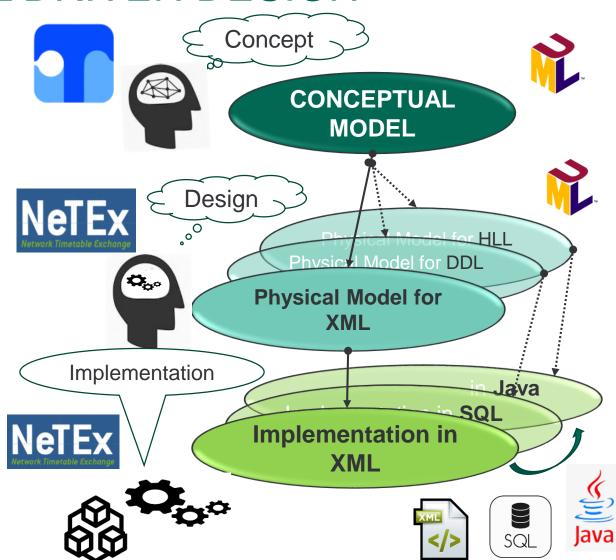
## Model Driven Design

Software engineering for robust standards

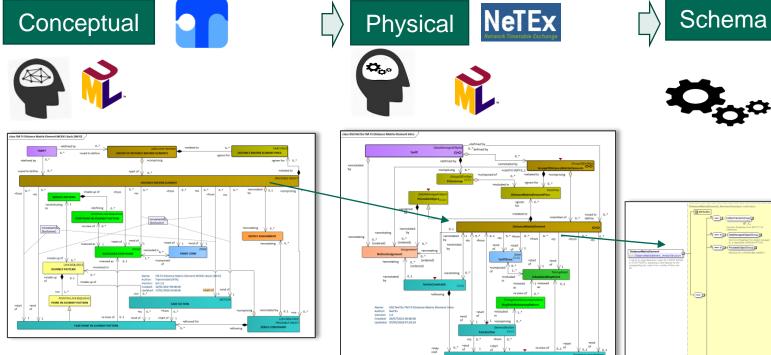


## MODEL DRIVEN DESIGN

- Conceptual Model is implementation independent
  - Use to design
  - Described in UML
- May have alternative Physical Models for different target implementations
  - XML Physical design as UML
- Implementation is derived from physical model.
  - NeTEx XML Schema



#### Designing a CEN Exchange format -Package & Element level traceability



#### Traceability

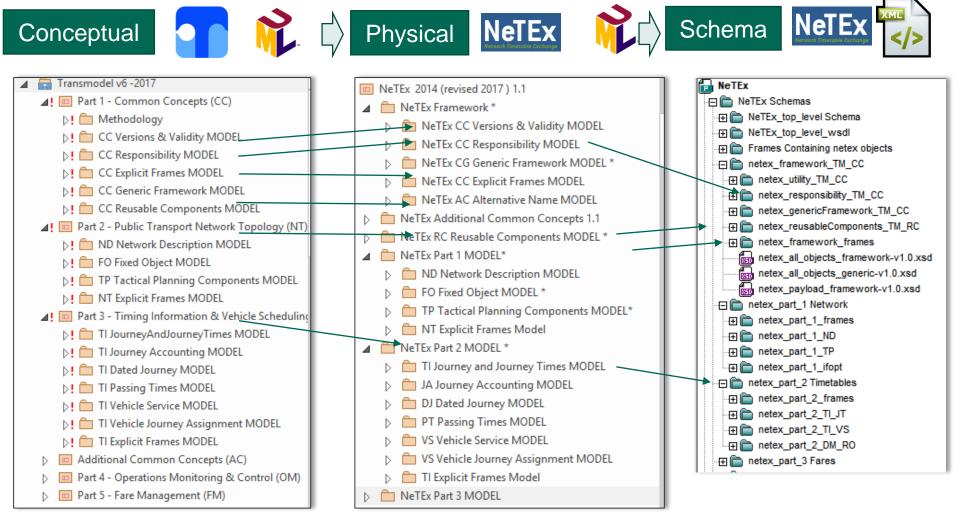
- Equivalent elements can be found at each level
- Physical design and Implementation each add further detail and constraints
- Tool support (EA, XML SPY, OXYGEN, etc)



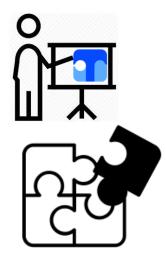


NeTEx

#### Designing a CEN Exchange format -Package & Element level traceability

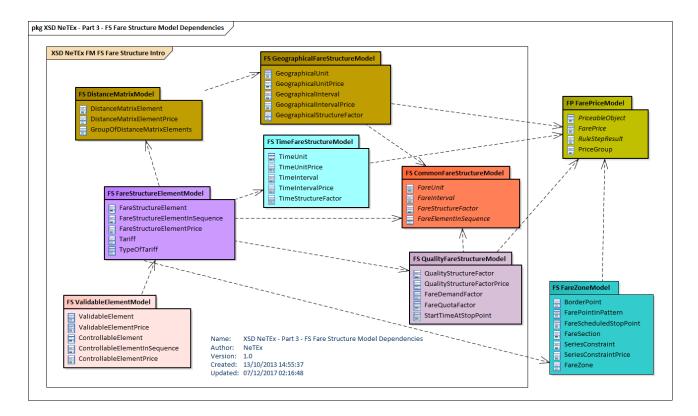




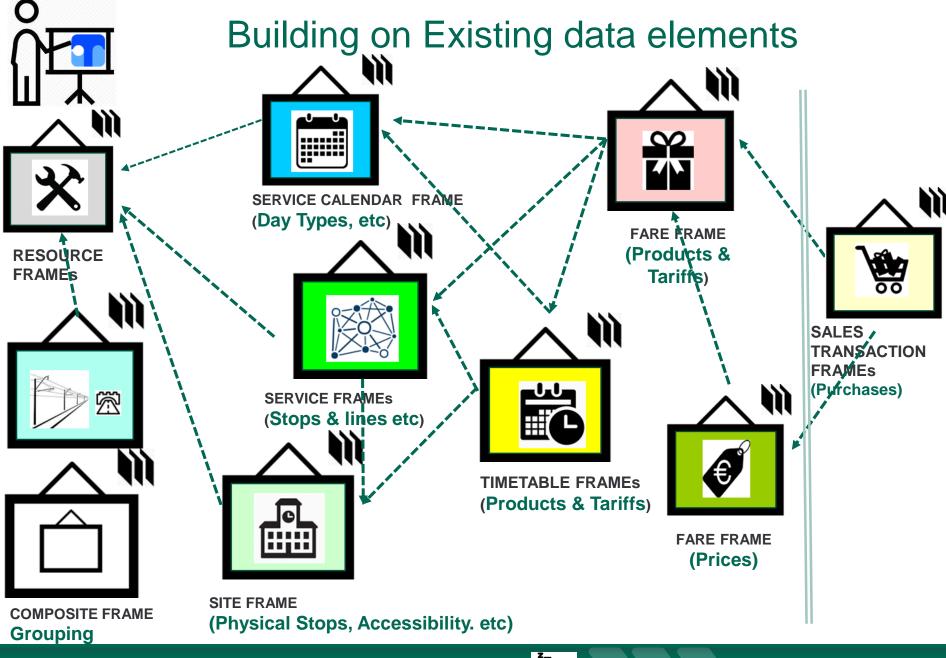


#### Modularisation & Package dependencies

- You only need use the elements you require for your use cases
- UML model identifies dependencies -











## Model Driven Design



## **Conceptual model**

- Uniform vocabulary of atomic, orthogonal, concepts
- Clear separation of concerns,
- Well defined relationships
- Modularised to satisfy specific use cases

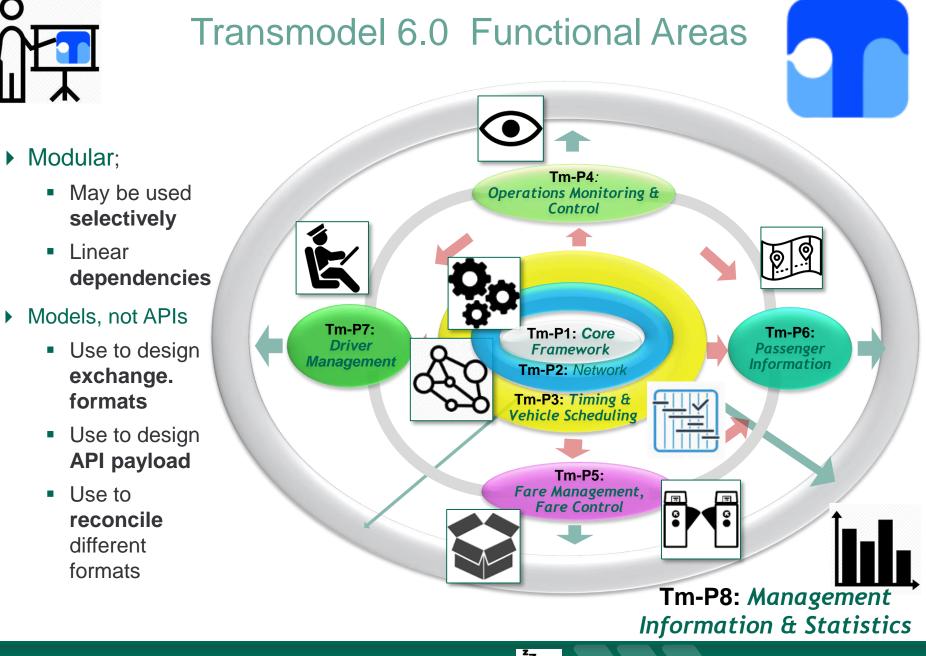


Joined up thinking!

## **Physical Model**

- Uniform Mapping from Conceptual to XML
- Systematically Engineered
- Traceability across design levels

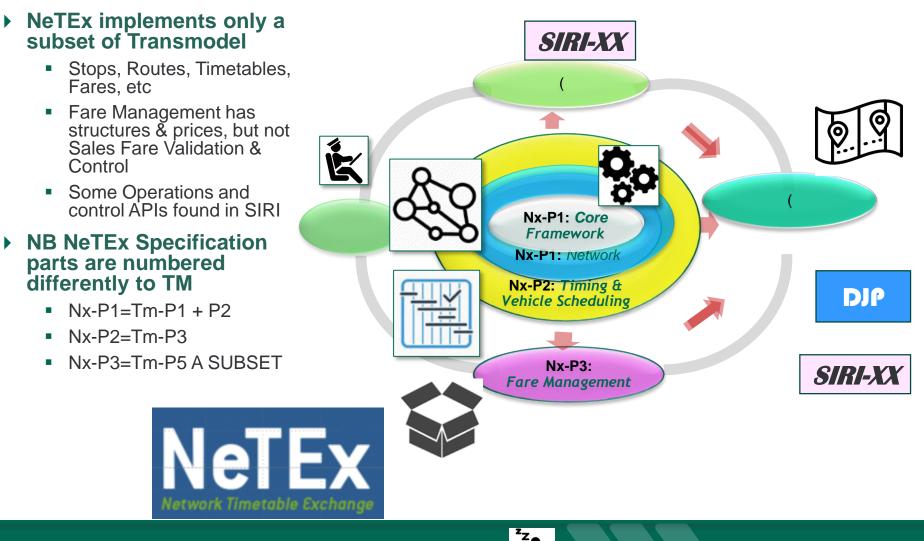


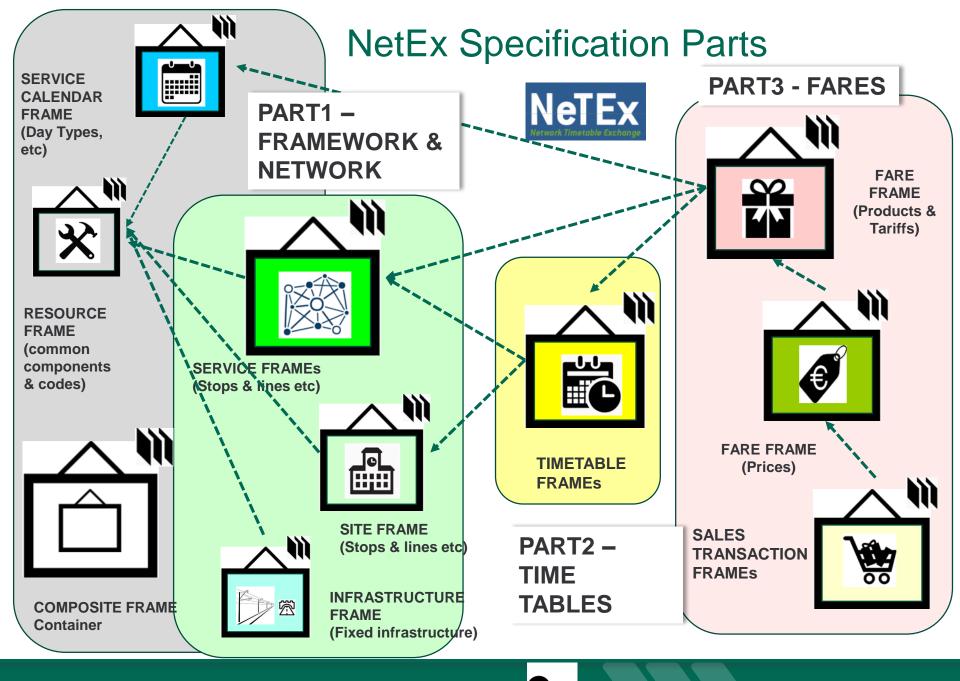






## **NeTEx 1.1 Functional Areas**







## Conceptual Modelling of Transport Systems



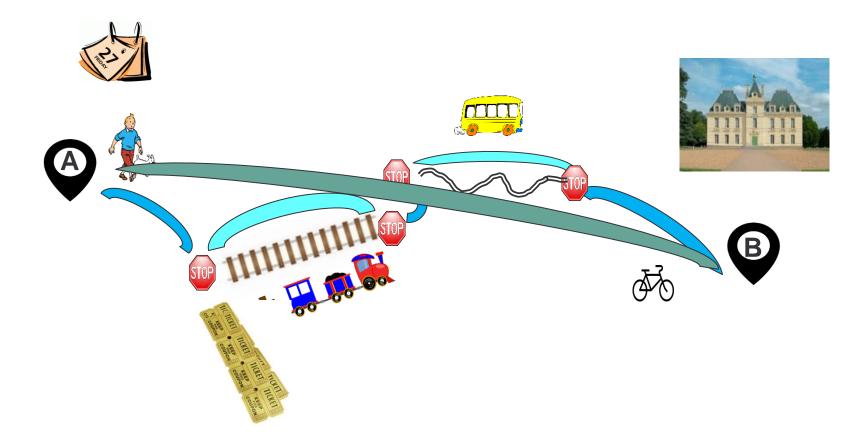


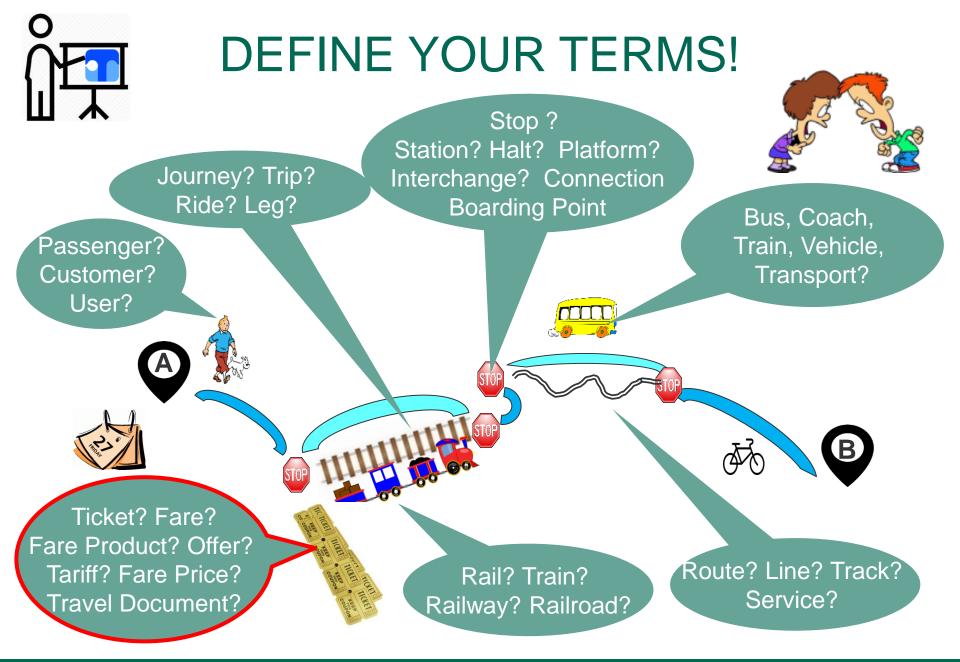


29 NeTEx UK Fare Profile - Introduction

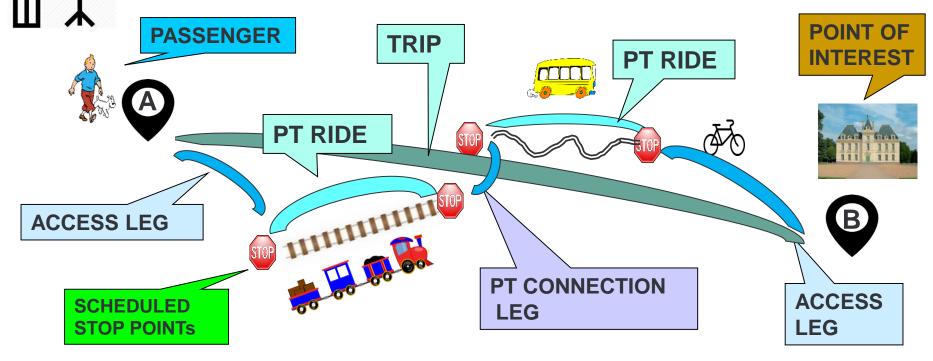


# Describing a simple journey from A to B - e.g. for a trip planner





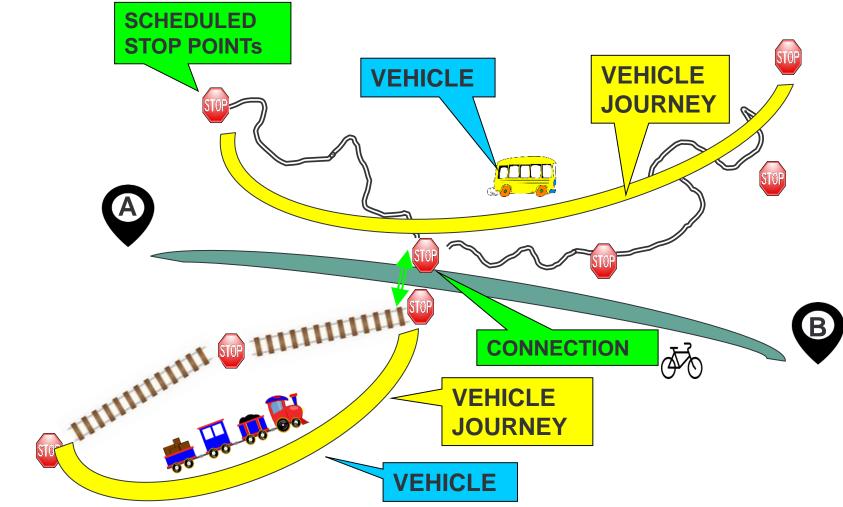
## A PASSENGER makes a TRIP....

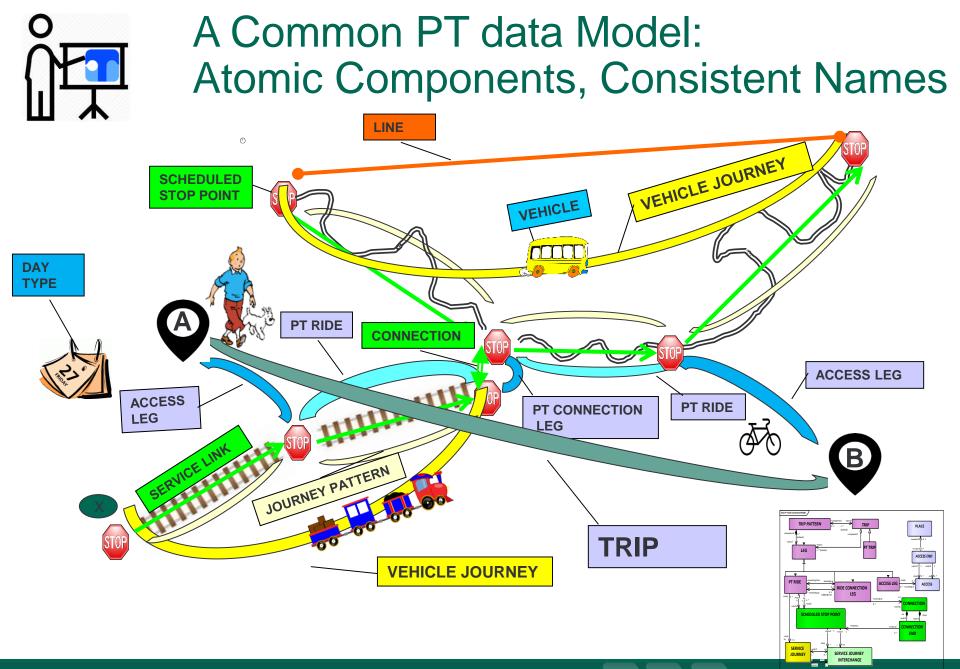


The passenger's TRIP is made up of one or more PT RIDEs, may start or end by an ACCESS LEG and may be interspersed with PT CONNECTION LEGs



## A VEHICLE makes a JOURNEY

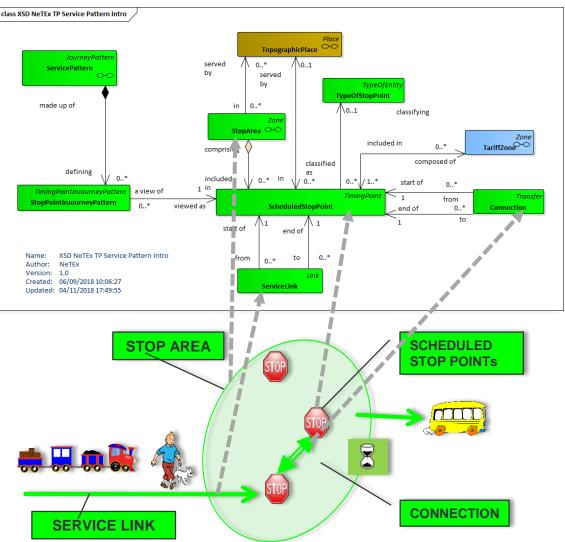




## **Data Models**



- Using consistent definitions allows us build a model
  - Entities & attributes
  - Relationships
    - **Association**: 1:0:, 1:0, 1:\*
    - □ Aggregation 1:\*, 0:\*
    - Inheritance
- A model lets us analyse how the data elements relate to different functions
  - Separate out concerns
  - Break down into separate submodels, clear dependencies
  - Factor out reusable components







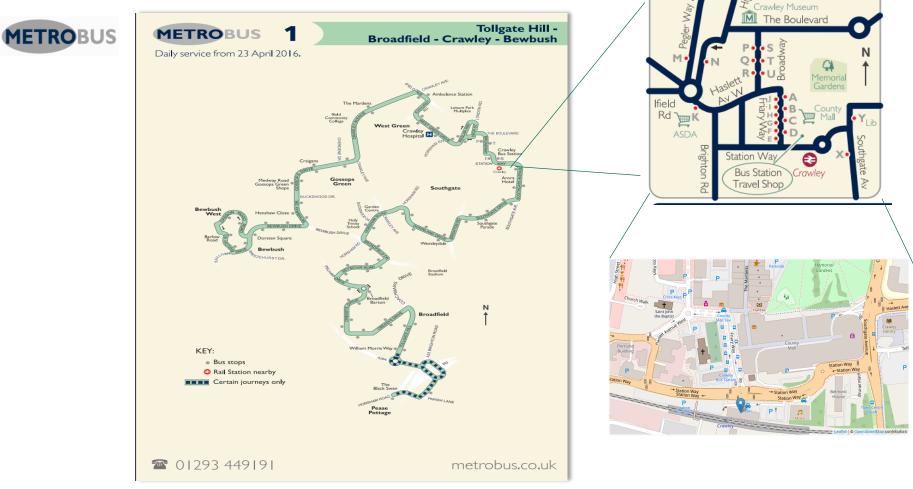
## A typical Bus timetable (Metrobus Route 1)

					e Hill - Broa											2			
Rewifi		ease	.+13	iollds ide	11	Southgate				awley awley P				ospital Gossops Green Bewbush					
• 1111-02		.ce	pou		te T		dfie	<b>~</b>	+hg	are		2Y 🥗	. d	ey r		cop <sup>6</sup>	,0,	.,60	sn
Daily	29	592-	1	Olla.		BIO,	<b>1</b> -	50	UC.	C	314.	(	Clan		GOS	50.1	B	300.	
	<u>.</u>			5		é		- <b>é</b>		- Ū		(	Ĭ		ŏ				
from 3rd February 2018																			
Mondays to Frid	ays																		
Pease Pottage Black Swan	<b>05</b> 37		<b>06</b> 34																_
follgate Hill Cemetery	1	<b>06</b> 07	1	0655		0728		0758	0811		0844	0903	<b>09</b> 20		35	50	05 20		1434
Tollgate Hill William Morris Way	<b>05</b> 40	<b>06</b> 08	<b>06</b> 38	<b>06</b> 56	<b>07</b> 13	<b>07</b> 29	0744	0759	0812		0845	<b>09</b> 04	<b>09</b> 21		36	51	06 2	I	1435
Broadfield Barton	<b>05</b> 45	<b>06</b> 13	<b>06</b> 43	<b>07</b> 01	<b>07</b> 18	<b>07</b> 34	<b>07</b> 50	<b>08</b> 06	<b>08</b> 20	<b>08</b> 33	0851	<b>09</b> 10	<b>09</b> 26	Then	41	59	11 20	5	<b>14</b> 40
Southgate Wensleydale	<b>05</b> 51	<b>06</b> 20	<b>06</b> 50	<b>07</b> 08	<b>07</b> 26	<b>07</b> 42	<b>07</b> 59	<b>08</b> 16	<b>08</b> 32	<b>08</b> 47	<b>09</b> 02	<b>09</b> 19	<b>09</b> 34	at	49	04	19 34	1	<b>14</b> 48
Crawley Bus Station (arr)	<b>05</b> 56	<b>06</b> 25	<b>06</b> 55	<b>07</b> 13	<b>07</b> 31	<b>07</b> 48	<b>08</b> 05	<b>08</b> 22	<b>08</b> 39	<b>08</b> 55	<b>09</b> 10	<b>09</b> 25	<b>09</b> 39	these	54	09	24 3	) until	<b>14</b> 53
Crawley Bus Station, Stop I 😳	<b>05</b> 58	<b>06</b> 27	<b>06</b> 57	<b>07</b> 15	<b>07</b> 33	<b>07</b> 52	<b>08</b> 09	<b>08</b> 26	<b>08</b> 43	<b>08</b> 59	<b>09</b> 14	<b>09</b> 28	<b>09</b> 42	mins	57	12	27 43	2	1456
Nest Green Crawley Hospital	<b>06</b> 01	<b>06</b> 30	<b>07</b> 00	<b>07</b> 18	<b>07</b> 37	<b>07</b> 56	<b>08</b> 13	<b>08</b> 30	<b>08</b> 47	<b>09</b> 03	<b>09</b> 18	<b>09</b> 33	<b>09</b> 47	past	02	17	32 43	,	<b>15</b> 02
Gossops Green Shops	<b>06</b> 06	<b>06</b> 35	<b>07</b> 05	<b>07</b> 24	<b>07</b> 43	<b>08</b> 02	<b>08</b> 19	<b>08</b> 37	<b>08</b> 54	<b>09</b> 10	<b>09</b> 25	<b>09</b> 40	<b>09</b> 54	each	09	24	39 54	1	<b>15</b> 10
Bewbush Dorsten Square	<b>06</b> 10	<b>06</b> 39	<b>07</b> 09	<b>07</b> 28	<b>07</b> 47	<b>08</b> 06	<b>08</b> 24	<b>08</b> 42	<b>08</b> 59	<b>09</b> 15	<b>09</b> 30	<b>09</b> 45	<b>09</b> 59	hour	14	29	44 59	)	<b>15</b> 15
Bewbush West Barlow Road				<b>07</b> 32					<b>09</b> 03	<b>09</b> 19		<b>09</b> 49			18		48 03	-	<b>15</b> 19
Bewbush Dorsten Square	<b>06</b> 17	<b>06</b> 46	<b>07</b> 16	<b>07</b> 35	<b>07</b> 54	<b>08</b> 13	<b>08</b> 31	<b>08</b> 49	<b>09</b> 06	<b>09</b> 22	<b>09</b> 37	<b>09</b> 52	<b>10</b> 06		21	36	51 0	5	<b>15</b> 22
Mondays to Fridays cont																			
follgate Hill Cemetery	<b>14</b> 49	<b>15</b> 05	<b>15</b> 20	<b>15</b> 37	<b>15</b> 53	<b>16</b> 09	<b>16</b> 25	<b>16</b> 41	<b>16</b> 58	<b>17</b> 18	<b>17</b> 38	<b>17</b> 58	<b>18</b> 21	<b>18</b> 51	<b>19</b> 21	195	1 <b>20</b> 35	<b>21</b> 42	2249
follgate Hill William Morris Way	<b>14</b> 50	<b>15</b> 06	<b>15</b> 21	<b>15</b> 38	<b>15</b> 54	<b>16</b> 10	<b>16</b> 26	<b>16</b> 42	<b>16</b> 59	<b>17</b> 19	<b>17</b> 39	<b>17</b> 59	<b>18</b> 22	<b>18</b> 52	<b>19</b> 22	<b>19</b> 52	2 <b>20</b> 36	<b>21</b> 43	<b>22</b> 50
Broadfield Barton				<b>15</b> 43						<b>17</b> 24							5 <b>20</b> 40		<b>22</b> 54
Southgate Wensleydale		<b>15</b> 20			<b>16</b> 07	<b>16</b> 23			<b>17</b> 12			<b>18</b> 11	<b>18</b> 33	<b>19</b> 03					2259
Crawley Bus Station (arr)				<b>15</b> 58	<b>16</b> 13				<b>17</b> 17			<b>18</b> 16	<b>18</b> 38			<b>20</b> 0			<b>23</b> 04
Crawley Bus Station, Stop I										1741			1842	1911			9 2052		2306
West Green Crawley Hospital		1535						1709		1747		1824		1915			3 2055		2309
Gossops Green Shops		1543		1617	1631	1645	1701		1735	1755			1852	1921			9 2101	2208	2315
Bewbush Dorsten Square Bewbush West Barlow Road	1532 1536	1548		1622 1626		1650 1654	1706	1723	1740	1800 1804	181/ 1821		1856 1859	1925 1928		202	3 2105 5 2108		2319 2322
Bewbush West Barlow Road Bewbush Dorsten Square					1640 1642												5 2108 9 2111		2322
bewoush Dorsten Square	1323	1300	1012	1029	1043	105/	1713	1/30	174/	180/	1824	1842	1902	1951	2000	2023	2111	2218	2325

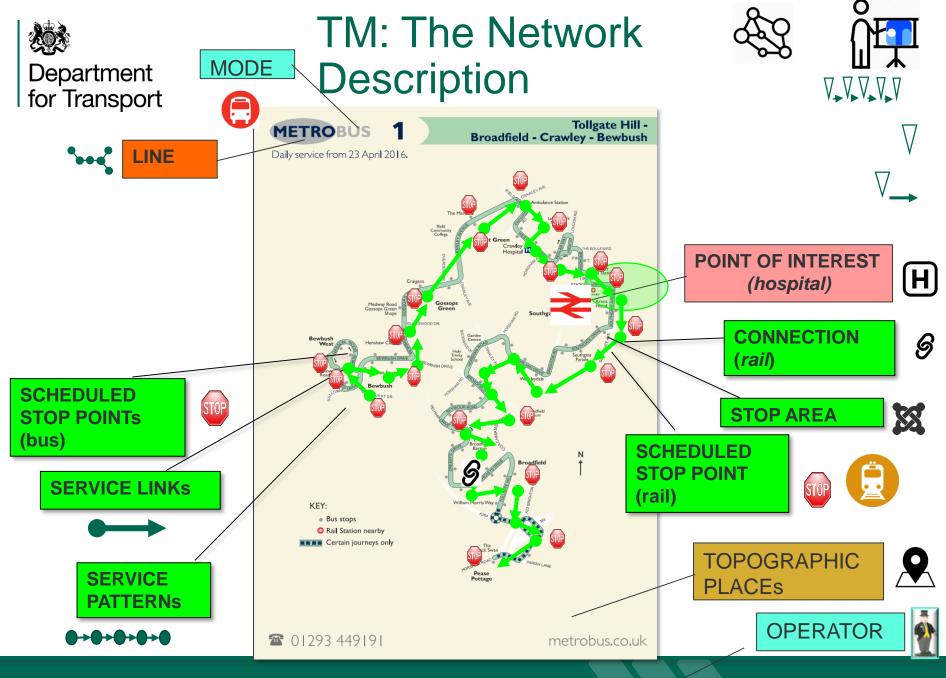
© Metrobus 2018



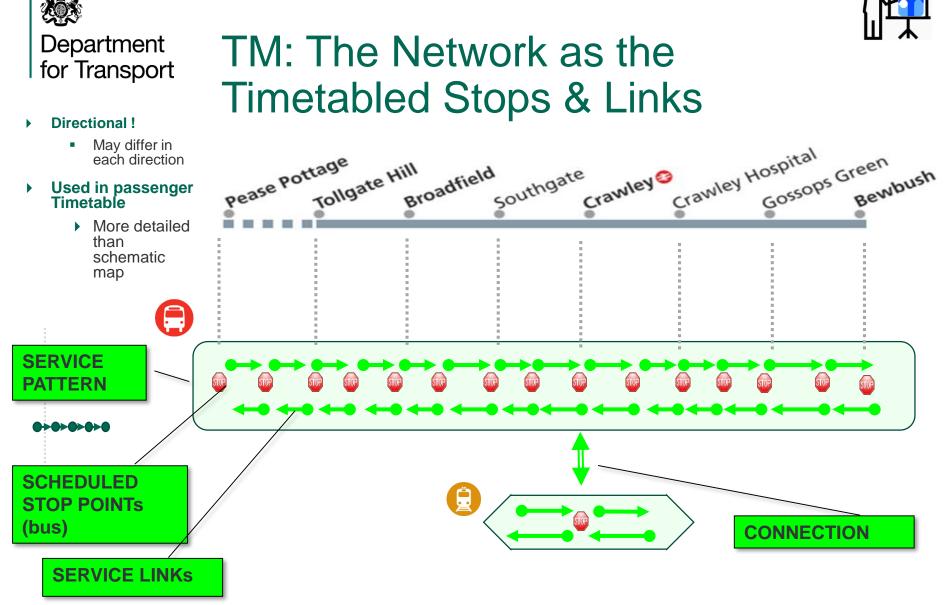
## A Typical Bus Route (Metrobus Route 1)



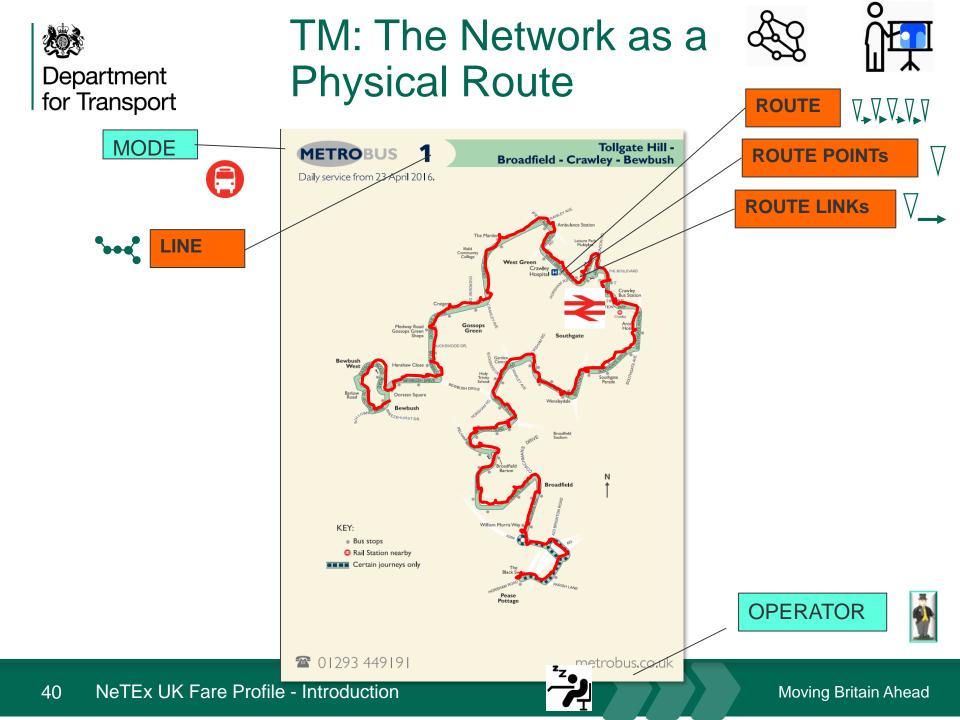
© Metrobus 2018





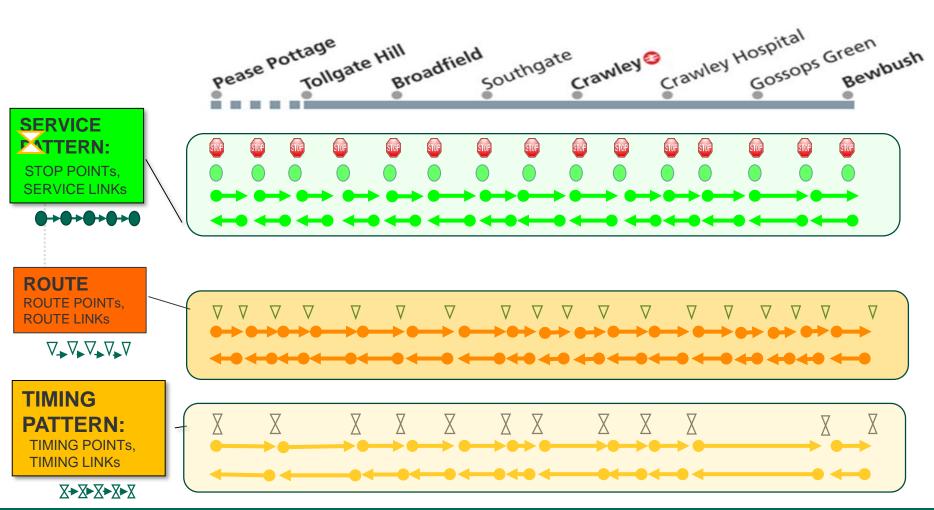






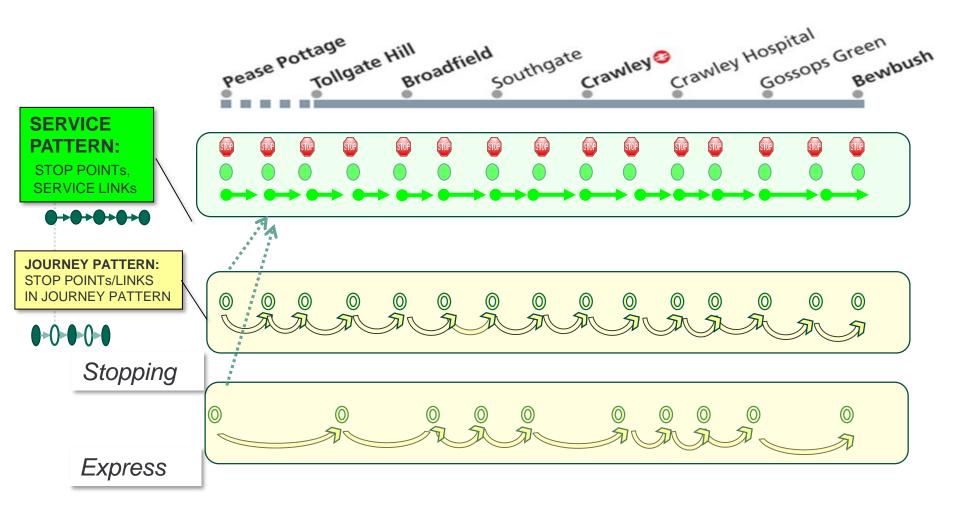


# The Network as the Operational route





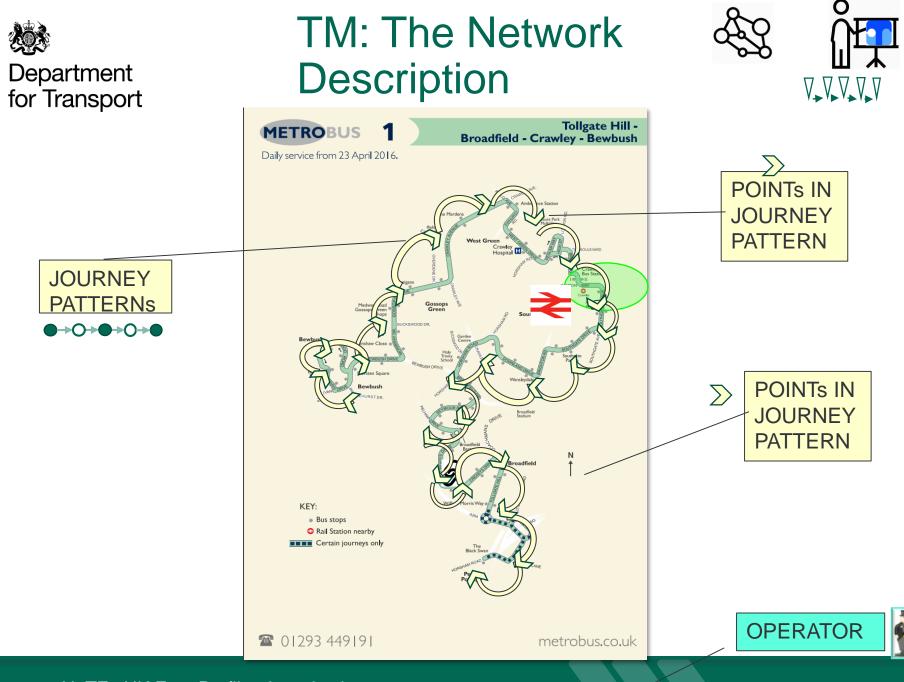
The Network for use in timetabling



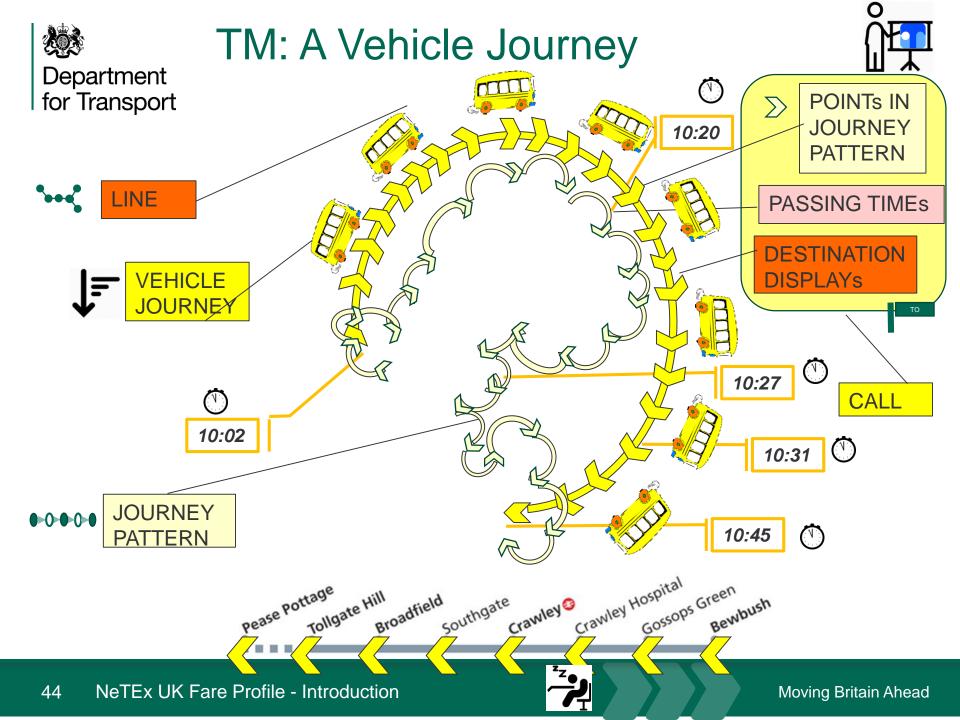
Department

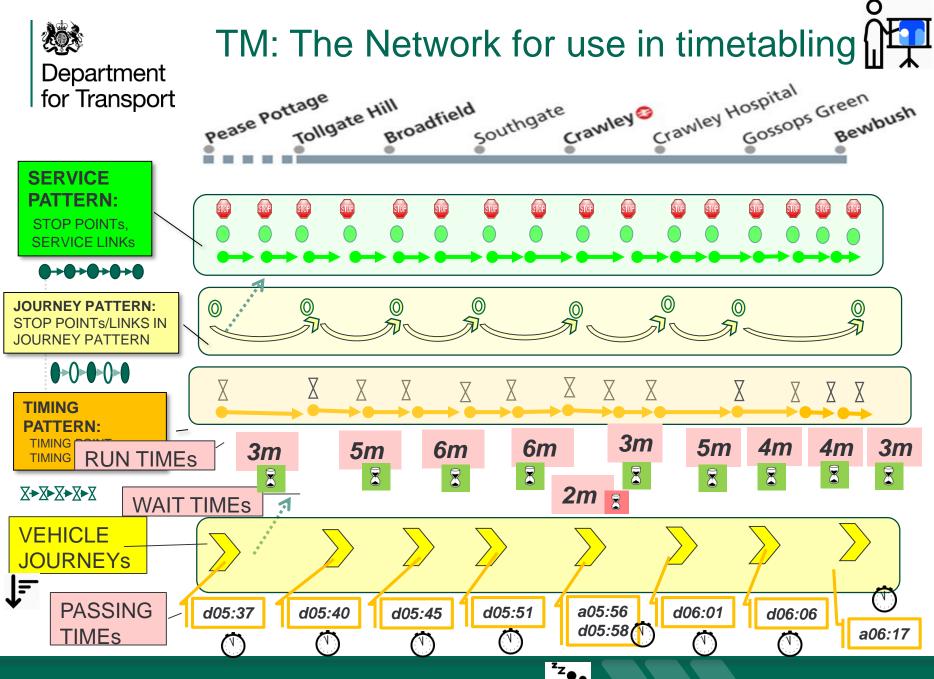
for Transport



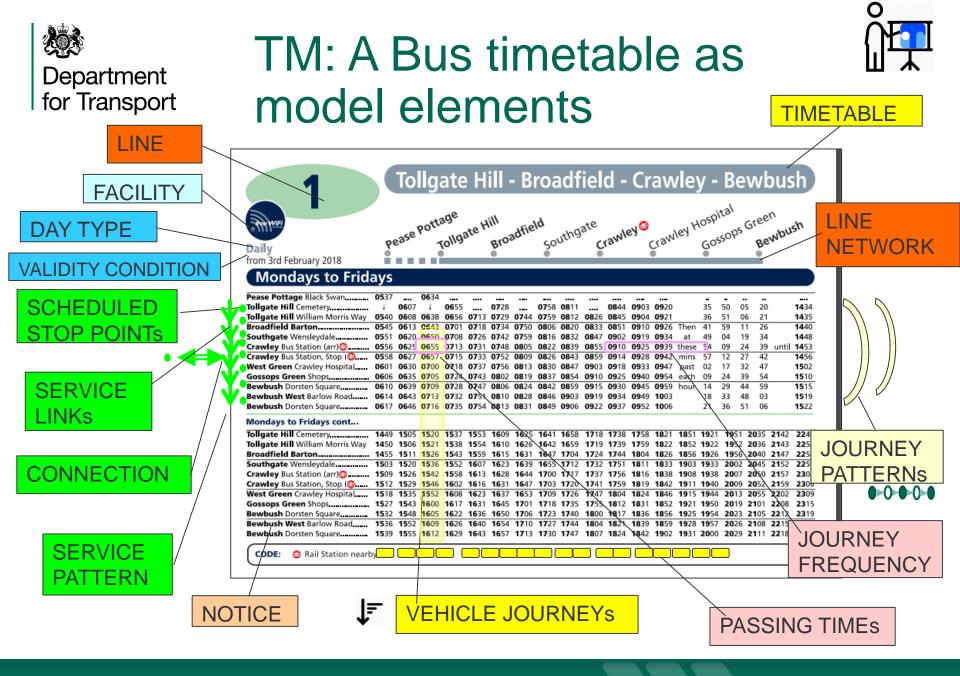


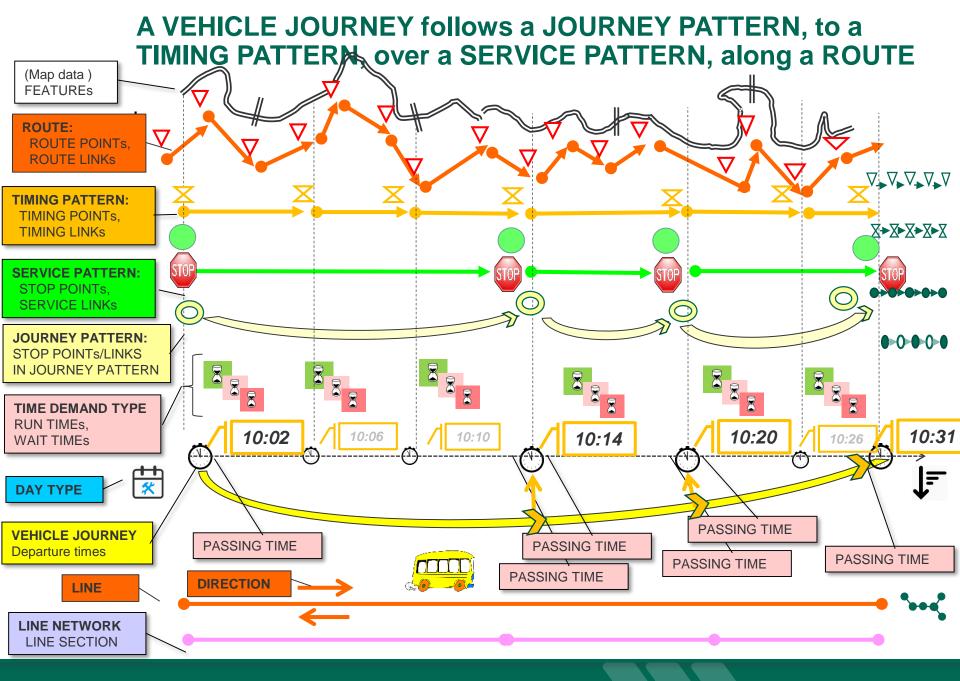
43 NeTEx UK Fare Profile - Introduction











#### 47 NeTEx UK Fare Profile - Introduction



## Some Transmodel principles: Separating Concerns

- Separate the different functional layers
  - E.g. Path on road (ROUTE) vs Sequence of Stops (SERVICE PATTERN)
- Separate the spatial from the temporal
  - E.g. Route vs Timings for the route
- Use a common architecture for spatial networks
  - Use a common "PATTERN of POINTs and LINKS"
  - Provide means of co-locating different layers (PROJECTION)
- Separate the Planned Calendar from the Operational Calendar
  - E.g. Day type that applies (SERVICE JOURNEY) versus assigned Calendar day (DATED JOURNEY)





# Advantages of Model Based Design

## Reusable:

- The same concepts & data sets can be used for
  - All PT domains: e.g. Networks, Timetables & Fares,
  - For all Modes,
  - For different use cases: planning, operations, PI, etc

## Precise, Modular

- Separates data sets of different stakeholders
- Only need to use relevant components / modules
- Extensible, Flexible

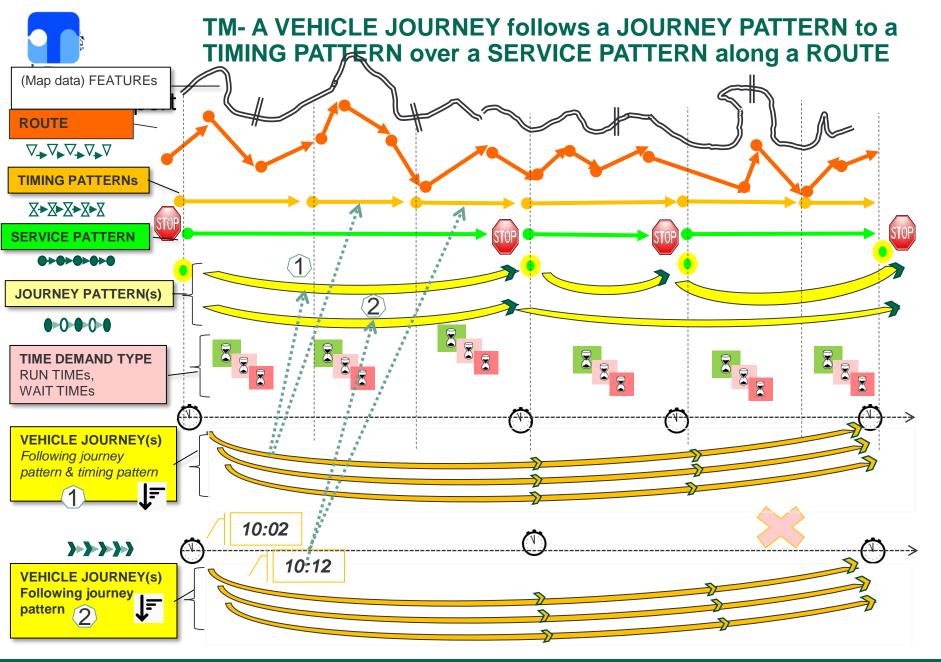
## Less complicated overall

Single, uniform set of concepts

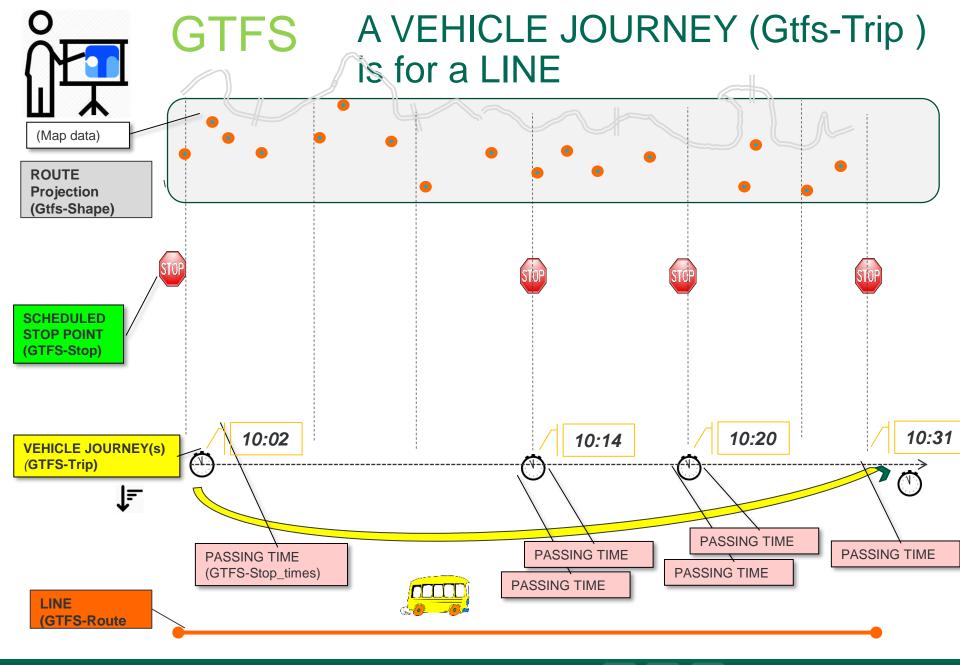
Department for Transport

# Some further Comparisons of Transmodel/NeTEx & GTFS

- Rail Modes
- TransXChange







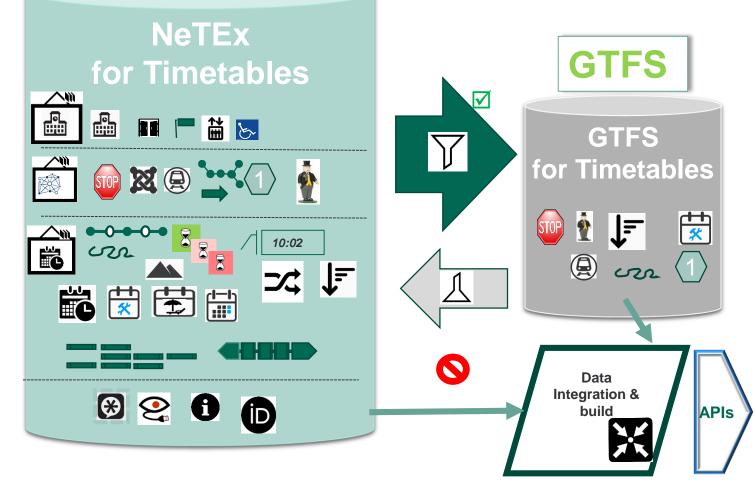




- GTFS is useful subset of timetable data for trip planning
  - Layers & times at stop resolved
  - Does not have underlying reusable elements to build
    - e.g. journey patterns, routes.
  - Does not cover complex aspects
    - e.g. grouping, connections , join/spilt, makeup, etc
  - Does not cover some operational data
- Round trip is "Lossy"
  - Lose some elements
  - Interpolation errors



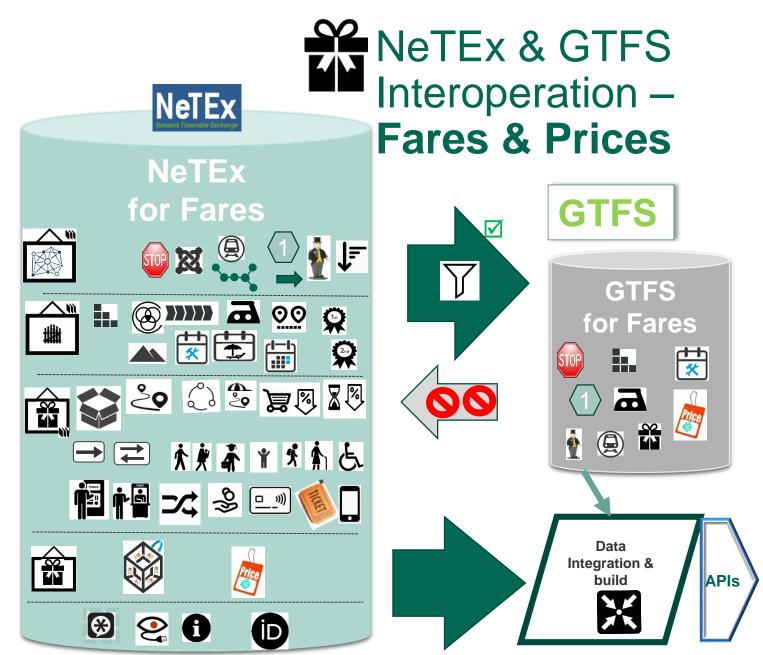


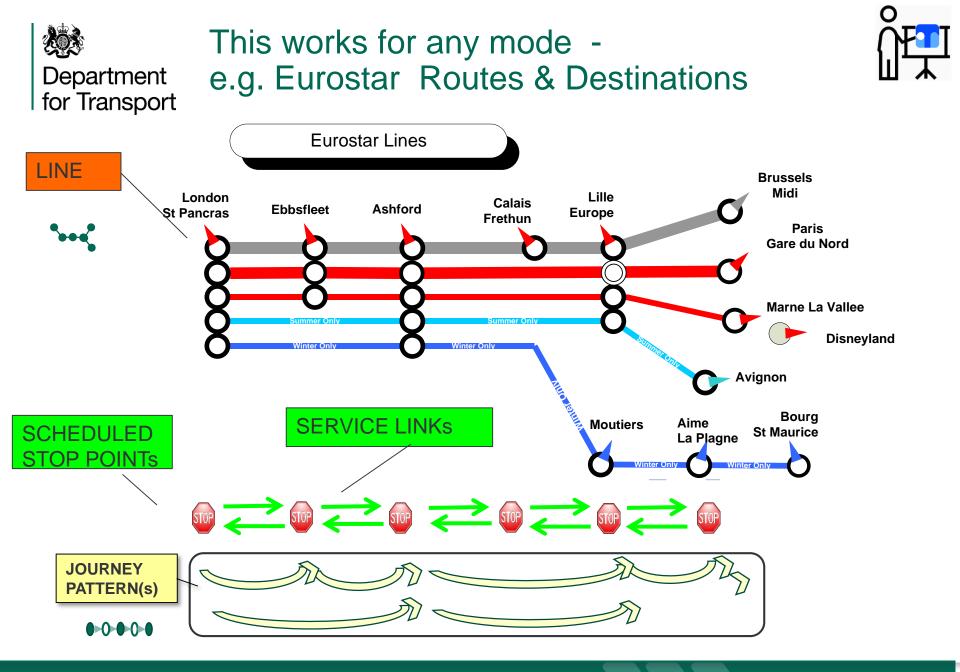


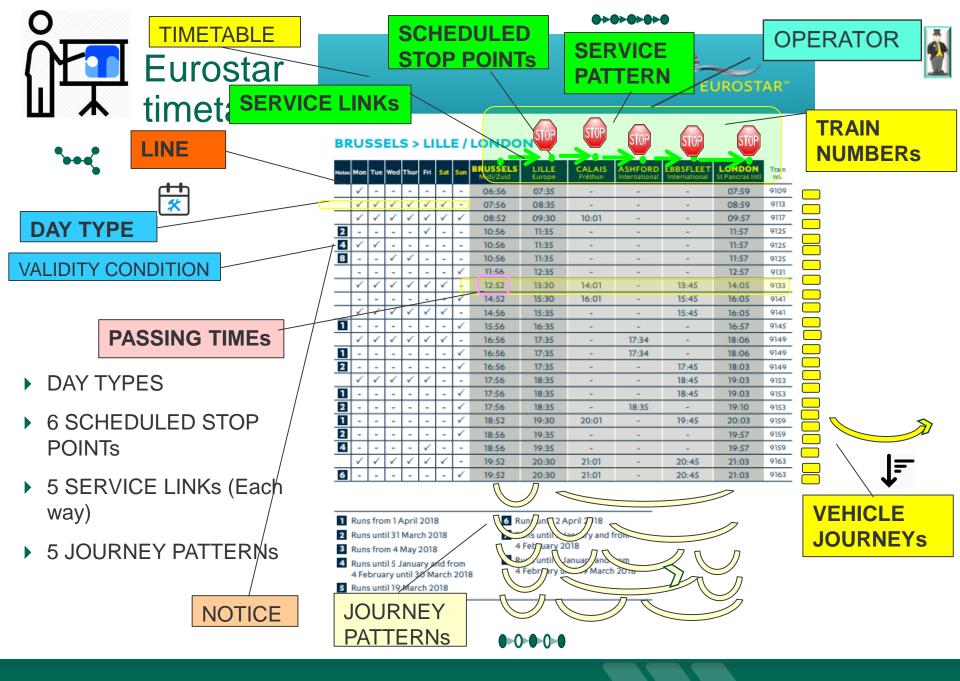


#### GTFS is very basic subset of fare data

- Flat & P2P structures
- Simple absolute prices
- Minimal "product" definition
- Missing many common distinctions
- Round trip is very, very "Lossy"









## TransXChange vs Transmodel

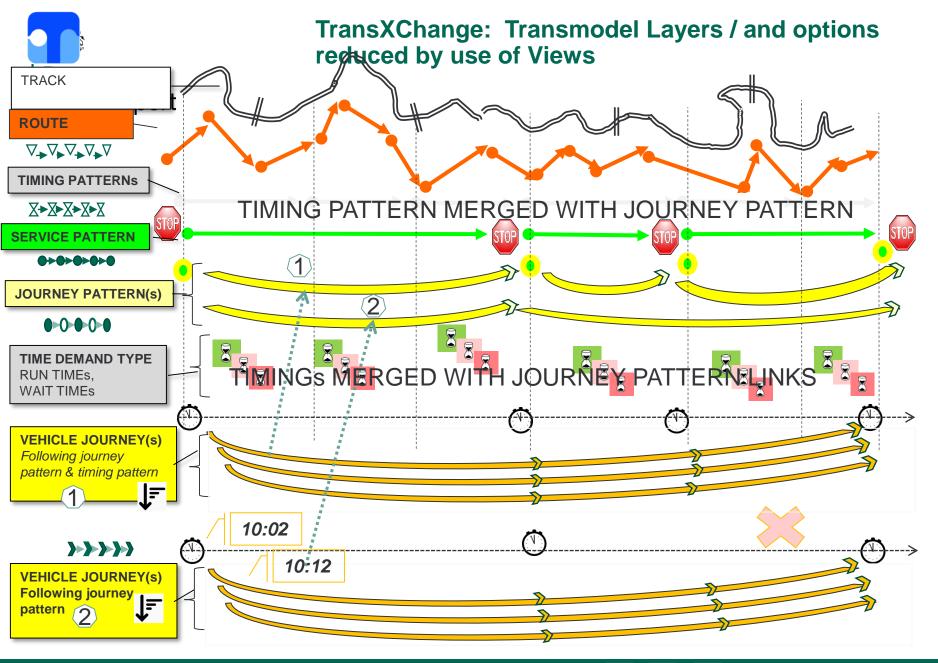
### Some use of views in TXC to combine TM elements to simplify

- (E.g. Timing Patters & Service Patterns)
- E.g. TimingLink + Runlime , Usage + Wait time

## Some changes in TM since TM 5.1

- E.g. Routes vs Service Patterns
- E.g. Separate Logical and Physical stops
- Some discrepancies in TXC
  - E.g. TXC Day types (TXC: "Operating Profile")
  - are not first class entities E.g. Dead Runs
- Some UK Specific Features
  - E.g. EBSR Registrations







Department for Transport



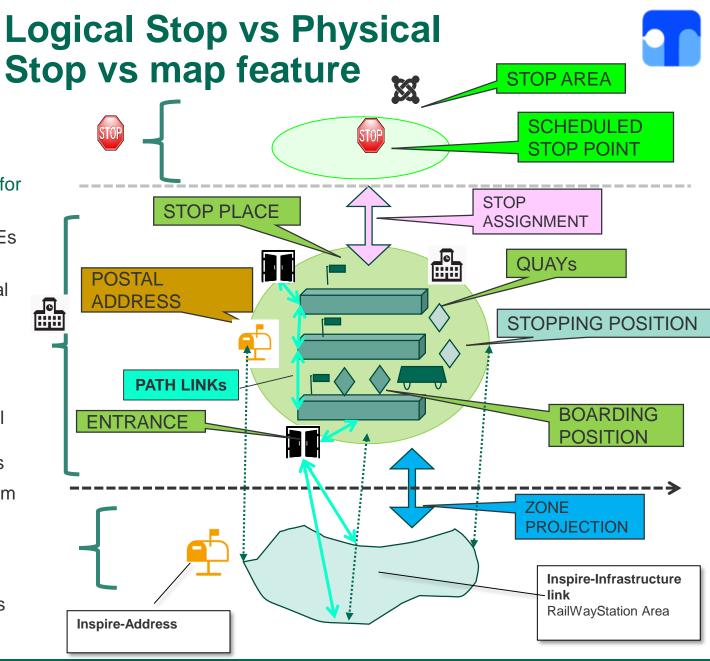
# Some other useful PT things that TM/ NeTEx can model

- Stations & Transport Interchanges
- Navigation & Accessibility
- Journey Interchanges & Timings
- Journey Accounting (e.g. Subsidies)

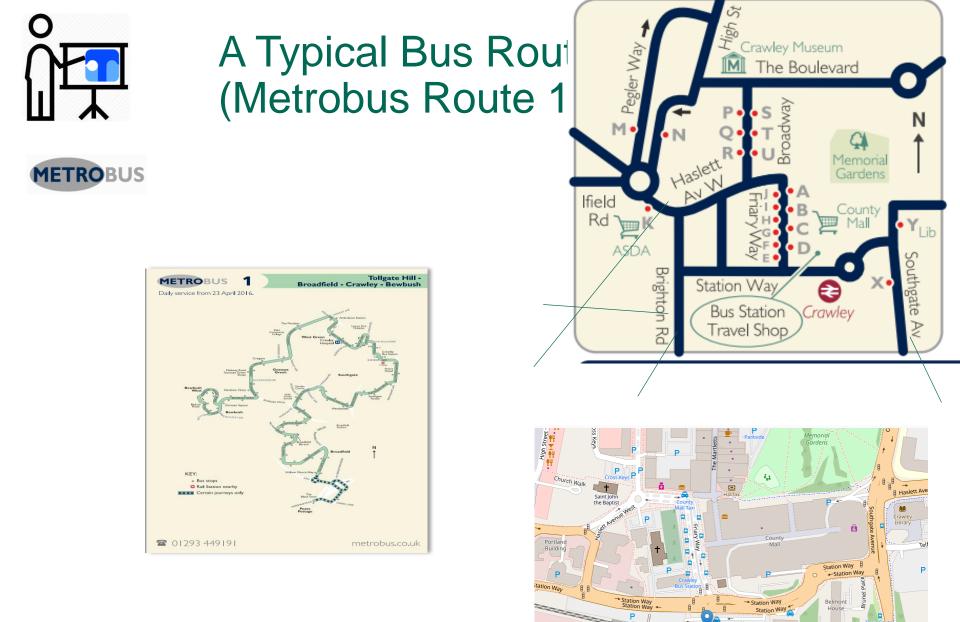
Journey Coupling, Train Make up, etc



- Transmodel: PT layers for SITES
  - 2D areas as ZONEs
  - Physical Stop is distinct from logical stop
  - Multiple layers, separation of concerns
  - "Projection" spatial mapping between layers as polygons
  - Any location system (OS, WGS etc)
- Can be integrated with Spatial data eg Inspire
  - Areas as Polygons







© Metrobus 2018

#### 62 NeTEx UK Fare Profile - Introduction

#### Moving Britain Ahead

Leaflet | © OpenStreetMap contributors

## **Crawley Station - Accessibility**

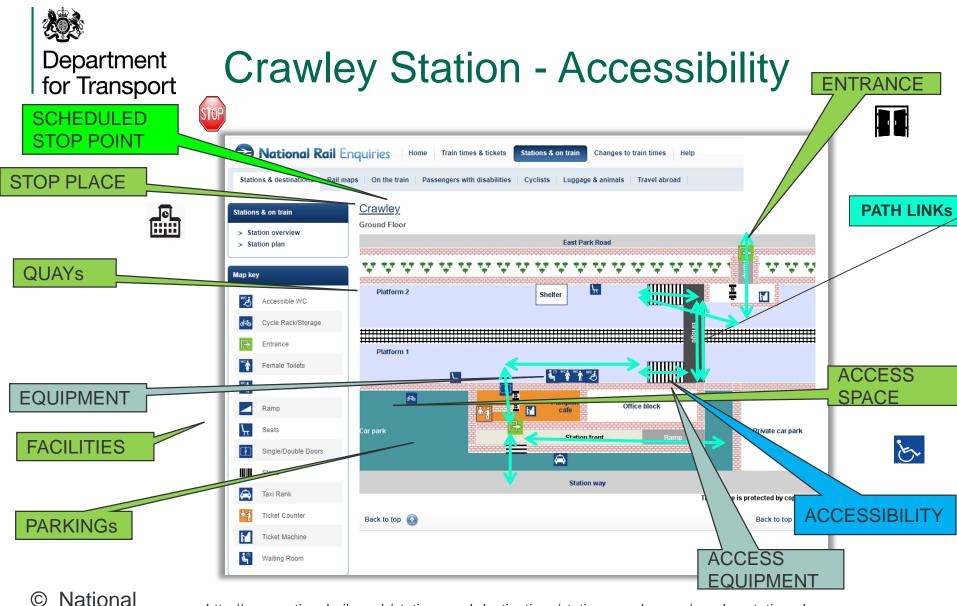
National Rail Enquiries Home Train times & tickets Stations & on train Changes to train times Help			
Statio	ons & destinations Rail	maps   On the train   Passengers with disabilities   Cyclists   Luggage & animals   Travel abroad	
Stations & on train Station overview Station plan		Crawley Ground Floor East Park Road	
Map key	y Accessible WC	Platform 2 Shelter	
#®  ₽  ```` <b>`</b>	Cycle Rack/Storage Entrance Female Toilets	Platform 1	
‴* ⊿ \_	Male Toilets Ramp Seats Single/Double Doors	How and the second s	Private car park
	Stairs Taxi Rank	Station way This image is p	protected by copyright
<mark>*4</mark> ₩ €°	Ticket Counter Ticket Machine Waiting Room	Back to top 💿	Back to top 💿

© National Rail Enquiries

Department

for Transport

http://www.nationalrail.co.uk/stations-and-destinations/stations-made-easy/crawley-station-plan



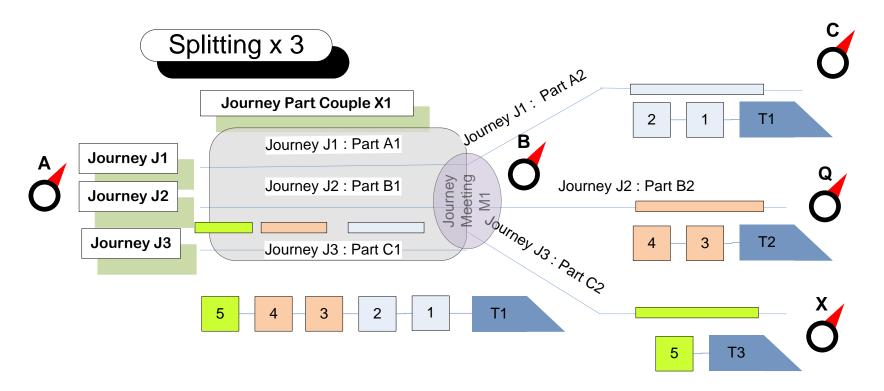
http://www.nationalrail.co.uk/stations-and-destinations/stations-made-easy/crawley-station-plan

### 64 NeTEx UK Fare Profile - Introduction

**Rail Enquiries** 



## Journeys that split or join, Train Makeup for Transport



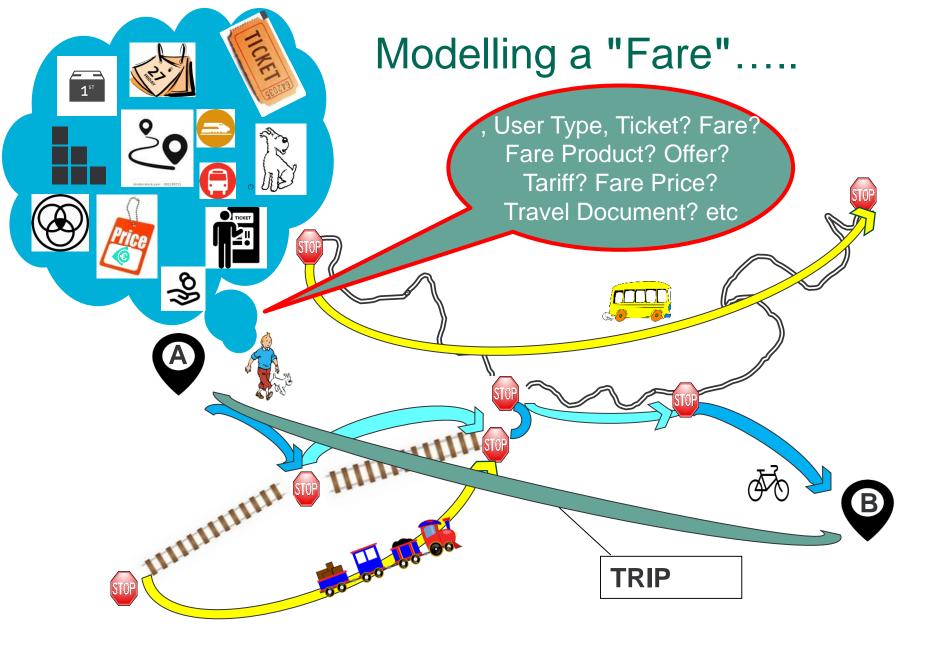
- VEHICLE JOURNEY, JOURNEY PARTS, JOURNEY PART COUPLES, JOURNEY MEETINGS, etc.
- TRAIN, TRAIN COMPONENT, etc

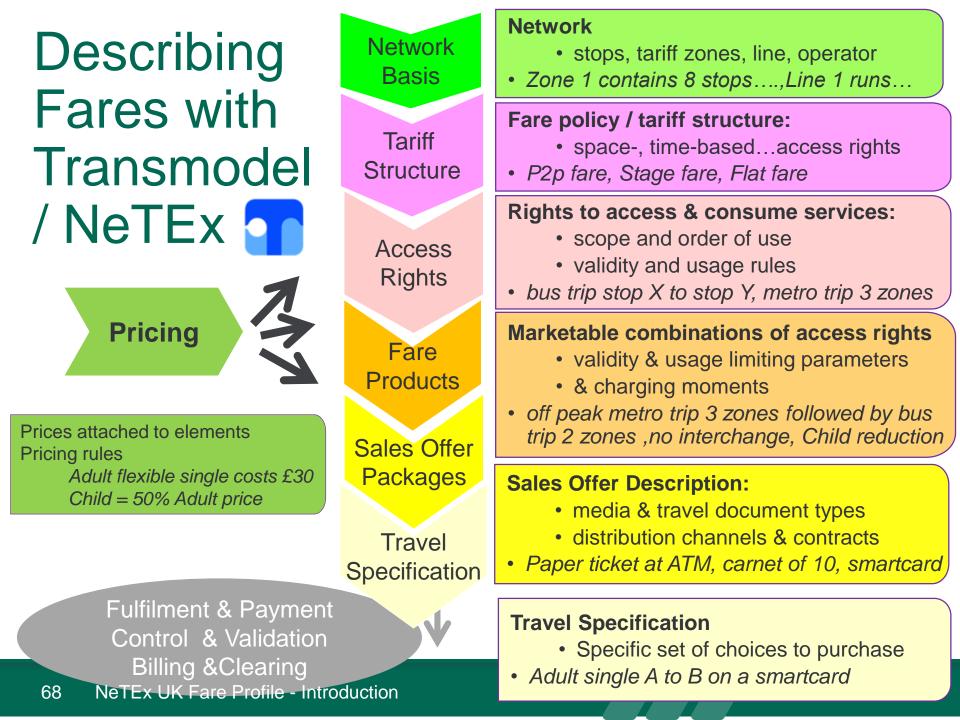
Department





# A Conceptual Model for Fares - an introduction





# Where am I travelling & what access is there to public transport?

**TRIP** 

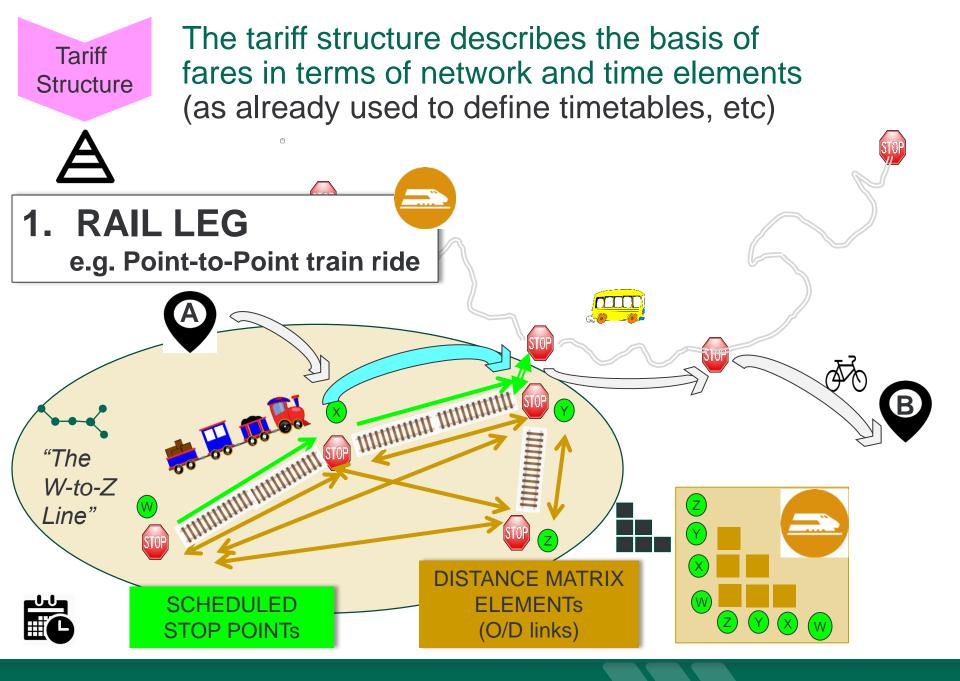
STOP

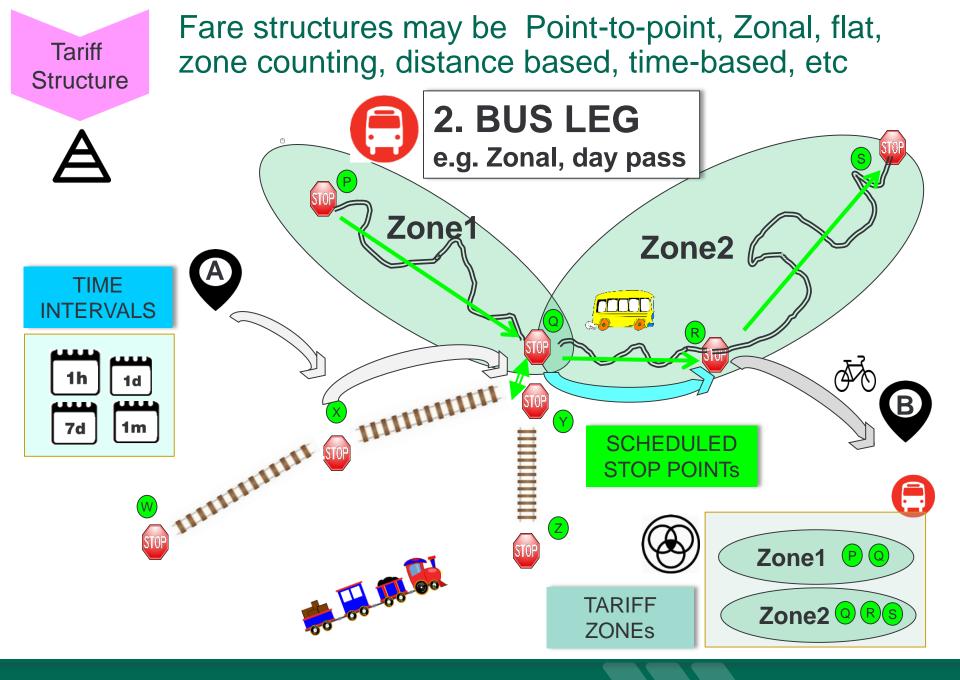
B

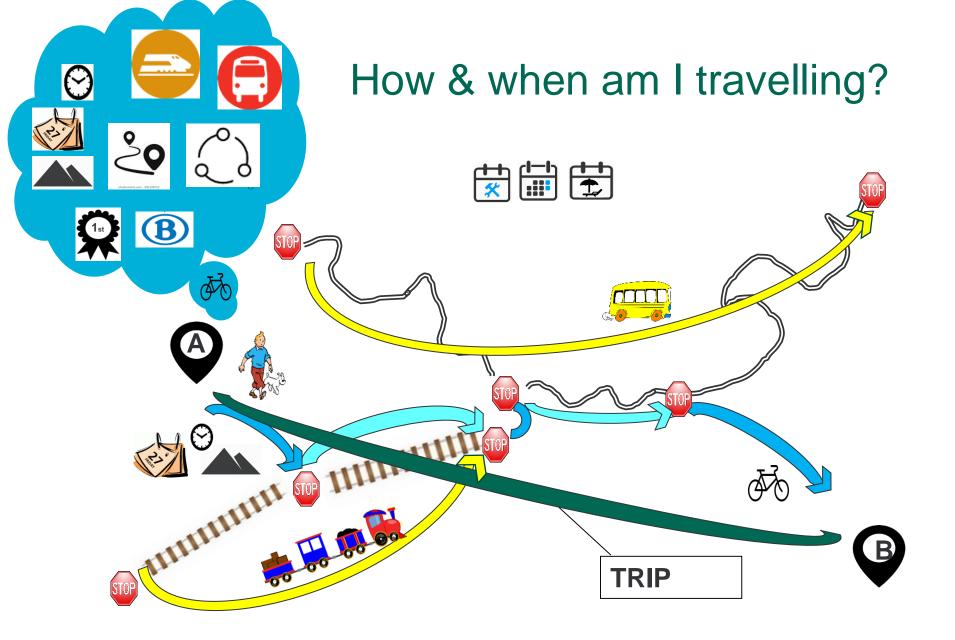
STOP

A

B

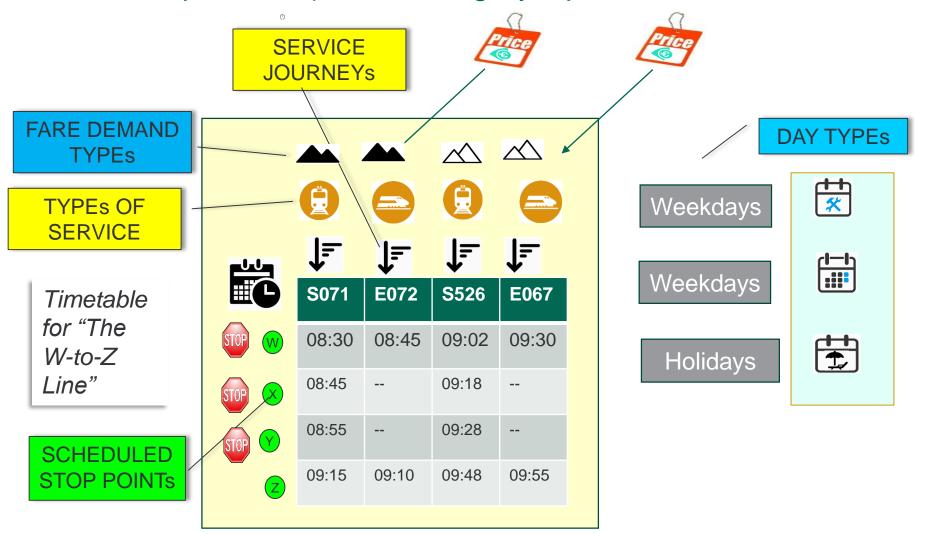


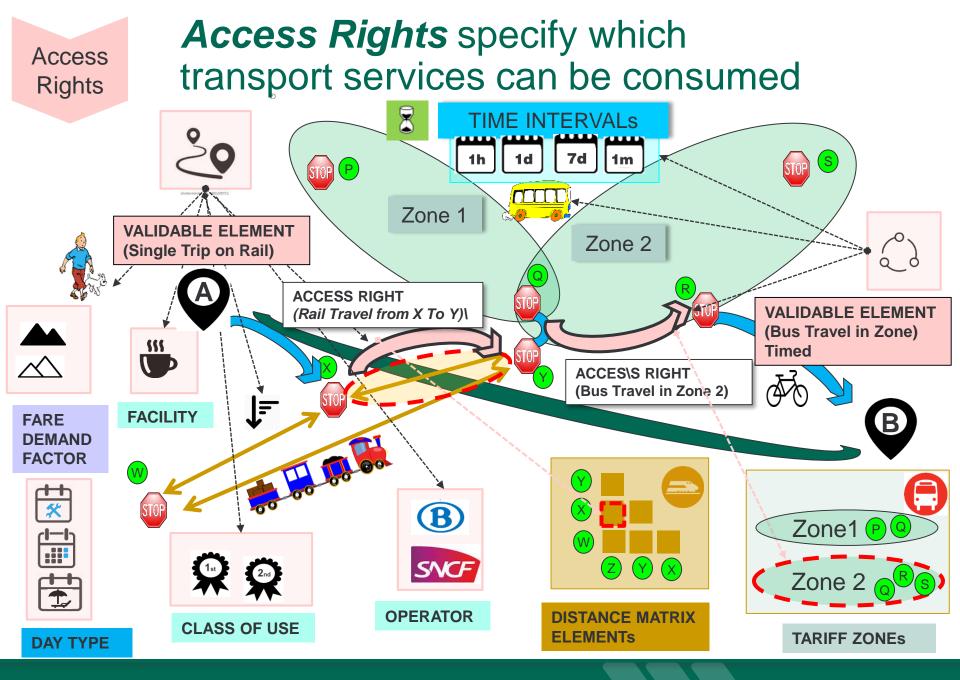




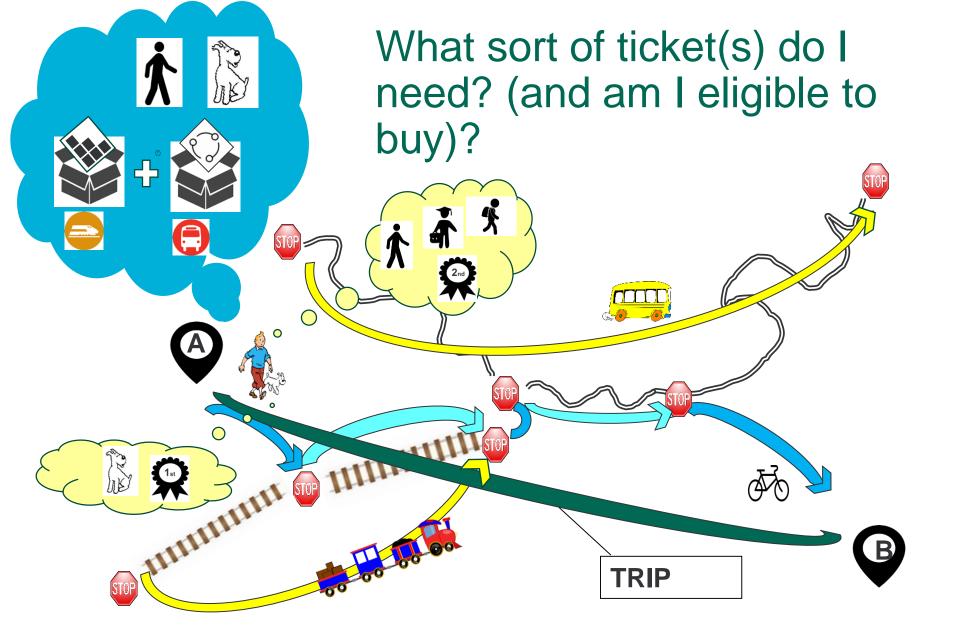
A

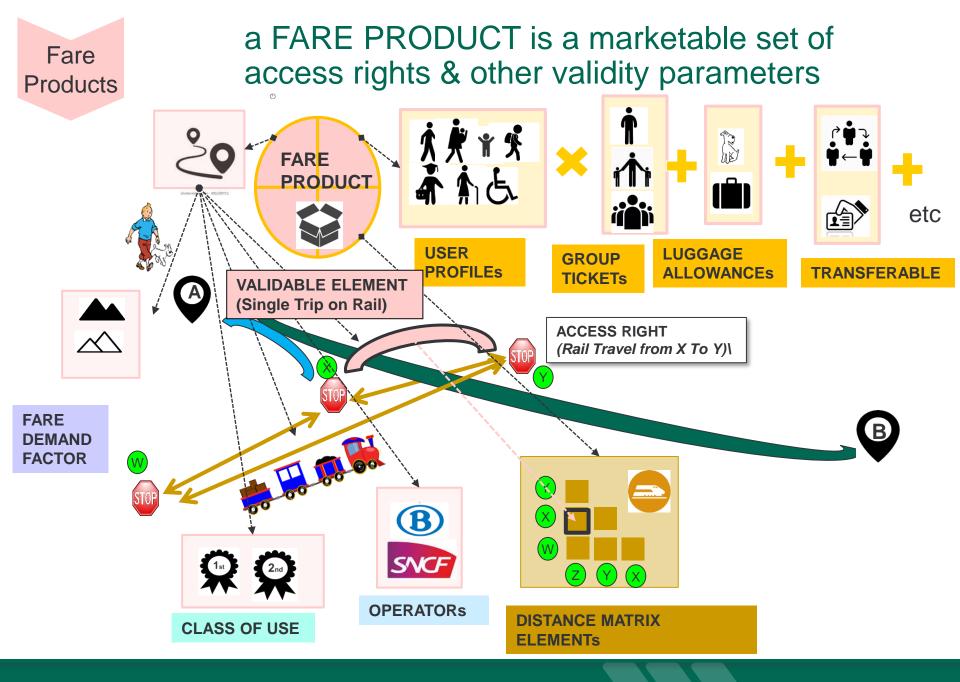
The tariff structure may also be based on Schedule related aspects, e.g. fare demand type (Peak, Off-peak, etc), train category, specific services, etc



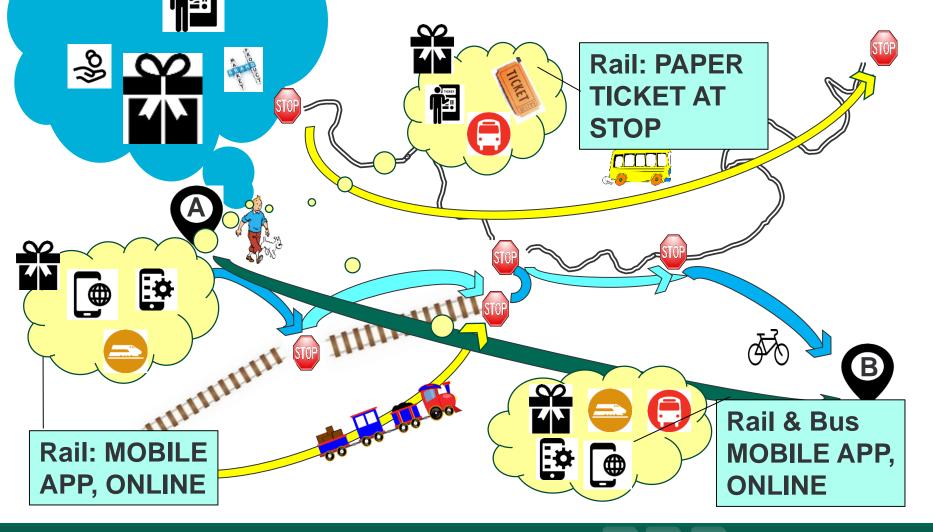


74 NeTEx UK Fare Profile - Introduction



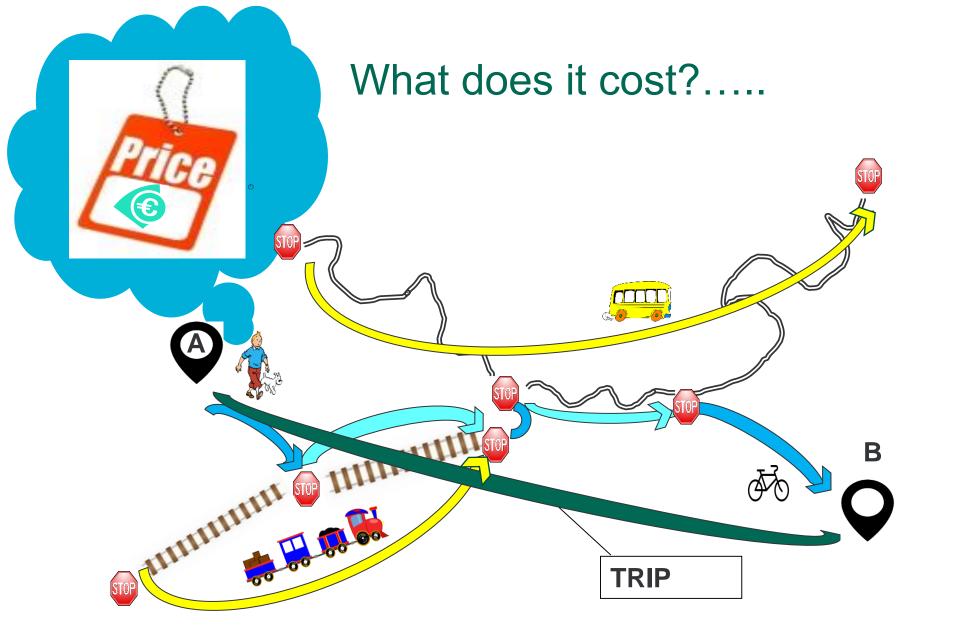


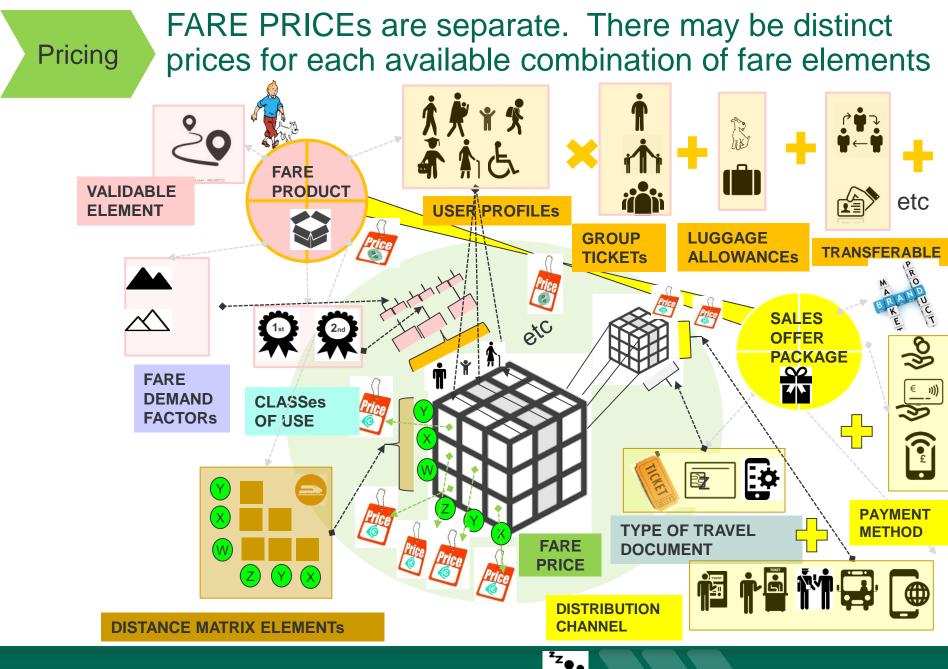
## How & where do I buy a ticket? What form does the ticket take?

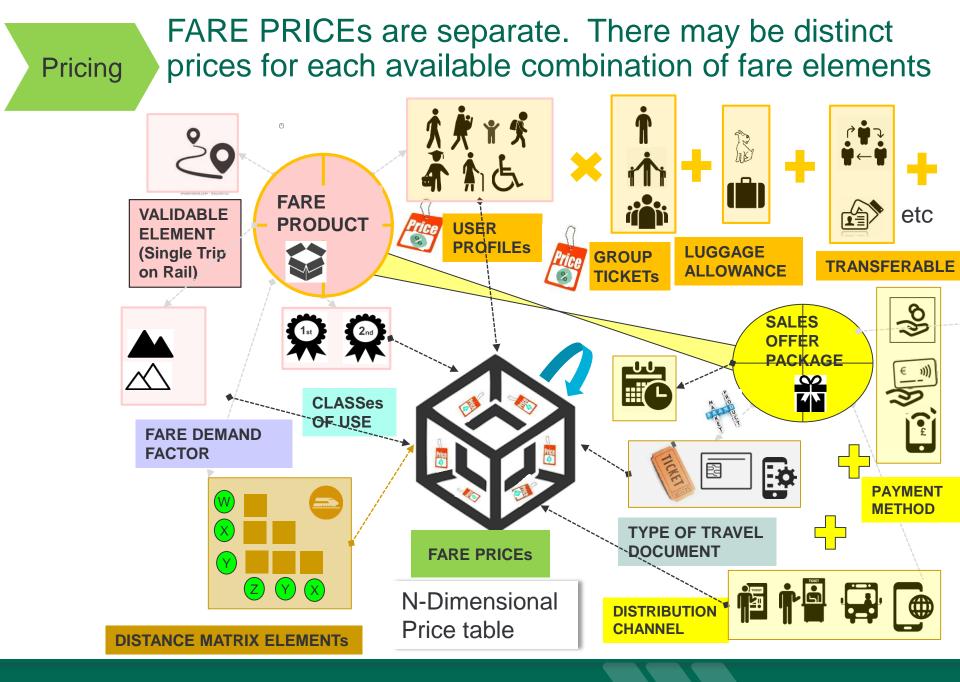


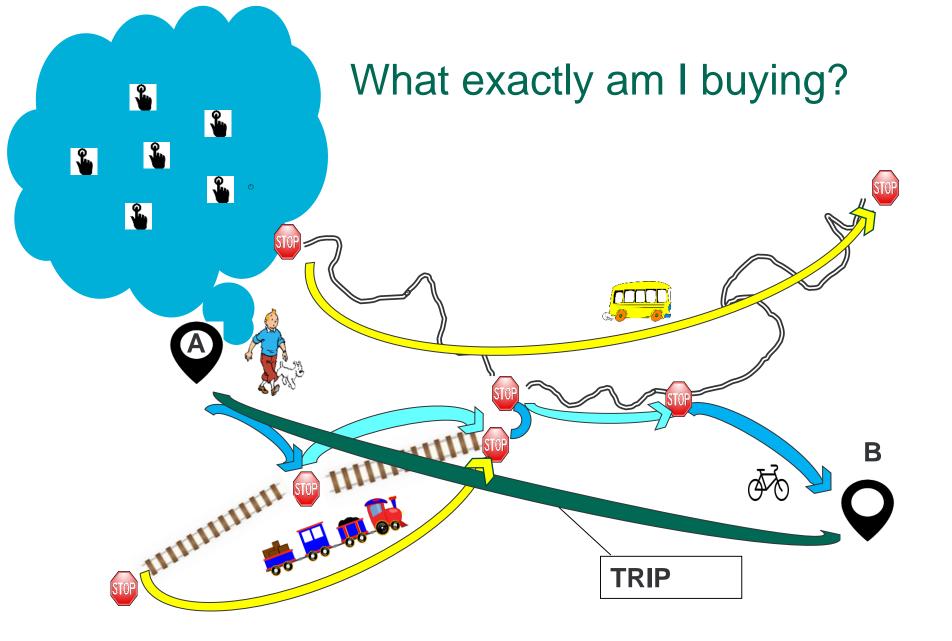
TICKF

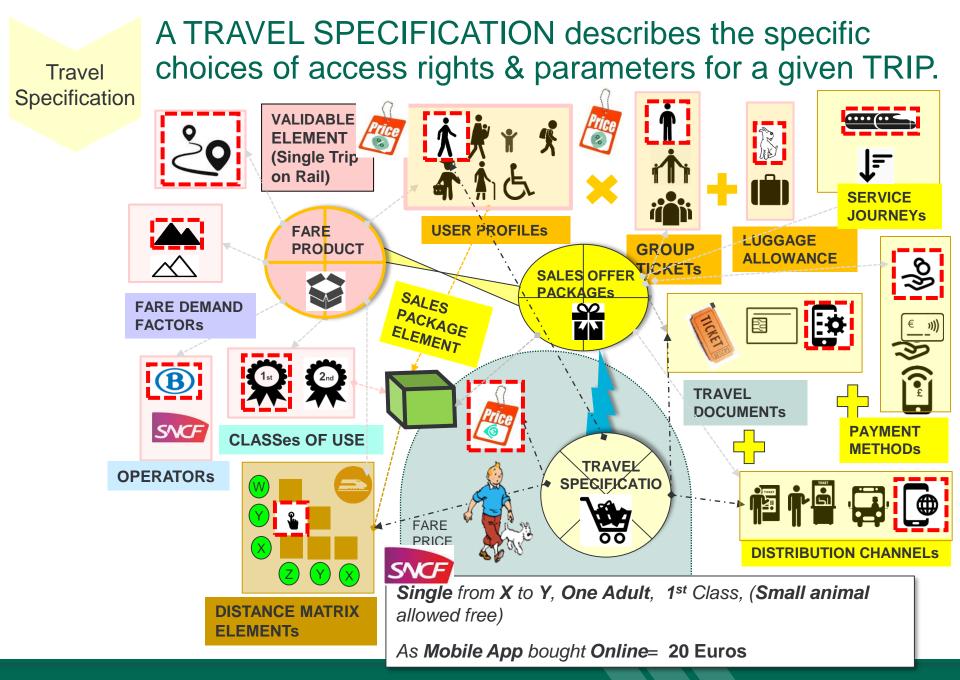




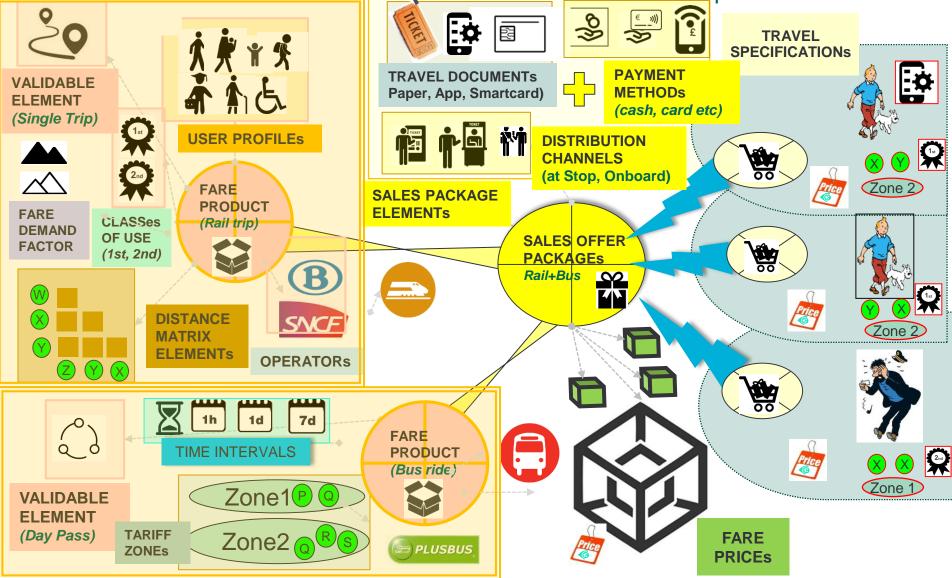




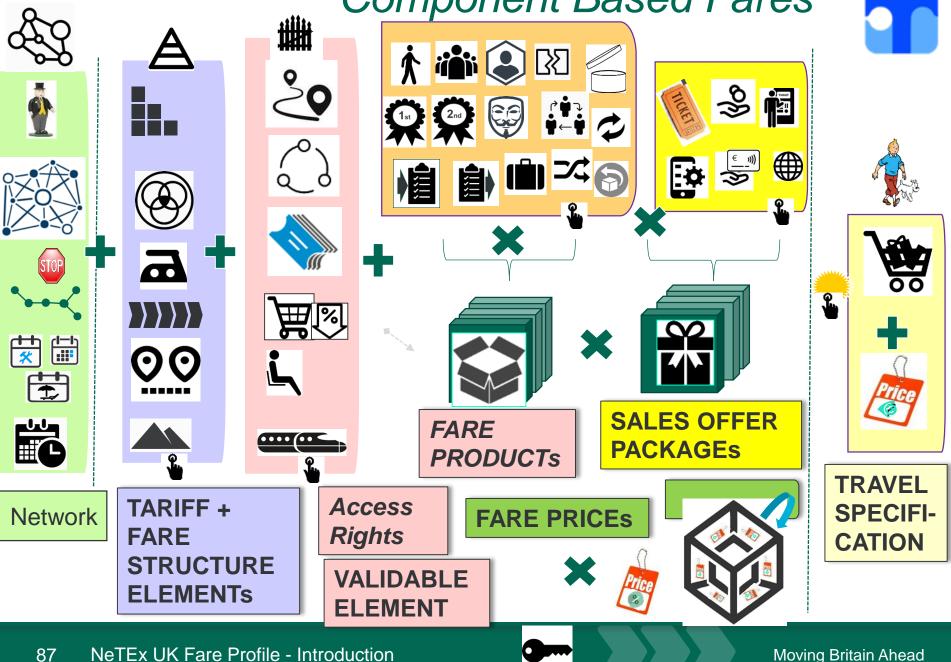




A SALES OFFER PACKAGE may include several different products. A FARE PRODUCT may be used in different SALES OFFER PACKAGES. Different TRAVEL SPECIFICATIONS will select different parameters



## **Component Based Fares**



## COMPONENT BASED FARES

We can describe any fare / tariff structure/ price if we break it down into separate concerns:



ijij

- TARIFF STRUCTUREs
  - Spatial (Point to Point, Zone)
  - Temporal (Intervals)
- ► ACCESS RIGHTS
  - Tariff, Mode, Class of Use, Service, etc



- PRODUCTs
  - Parameters, User Types, Travel, After Sales, etc



- SALES OFFER PACKAGEs
  - Type of Ticket, Media, Distribution,
- PRICEs
  - Base & Derived





# A product gives specific access rights





]%[

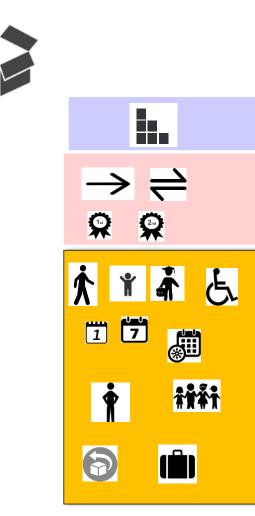
別

That can be validated...

- E.g. A single trip between two points
- E.g. A return trip to be made within a given period
- E.g. Unlimited travel within a zone for a given period
- E.g. Unlimited travel along a route between two points for a given period
- E.g. The right to buy other products at a discount for a given period



## A Fare Product is a set of options



- A single FARE PRODUCT may includes <u>all</u> the alternate choices (with different prices for the combinations):
  - E.g. All permitted Origin & Destination pairs
  - E.g. Single or Return trip
  - E.g. 1<sup>st</sup> & 2<sup>nd</sup> Class accommodation
  - E.g. Adult & Child & Student users
  - E.g. Valid for a period: for 7 or 30, 180 days
  - E.g. One, or many travellers
  - E.g. Refundable / Not Refundable
  - E.g. With Luggage allowance

# Combining products to make offers

With a simple visual notation for showing product choices and offer packages

(NB This is not part of the official standard)

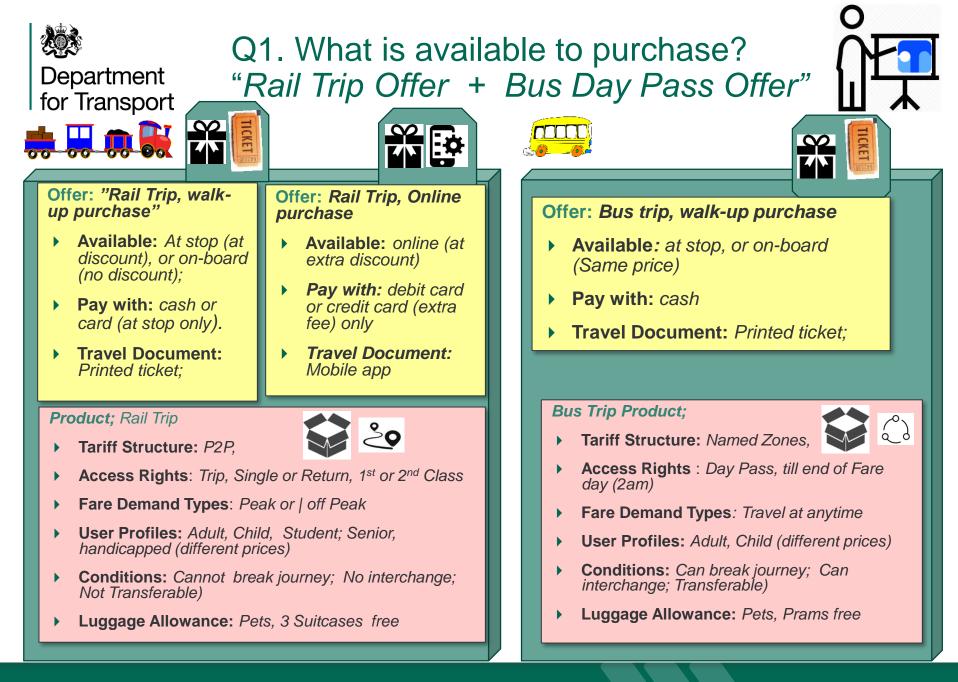


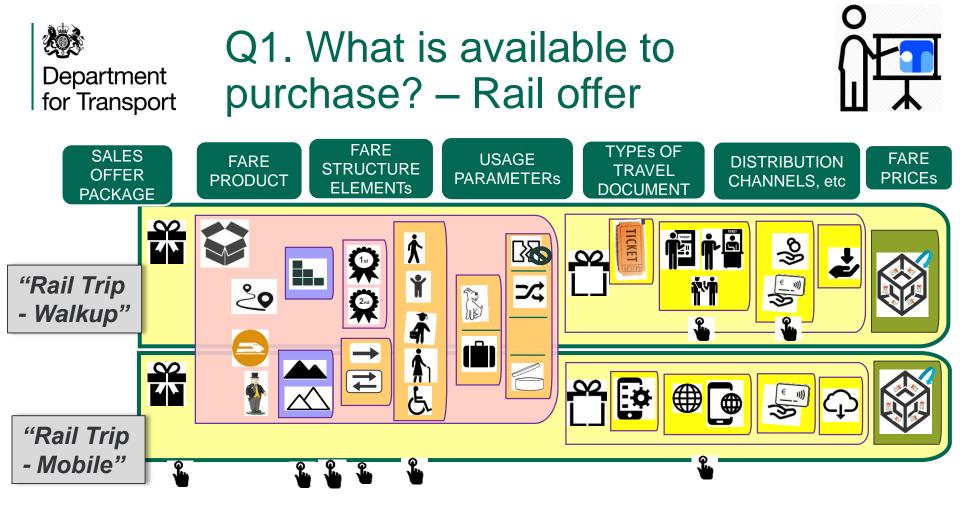
## Fare Products can be combined into Sales offers

- The same components may need to be combined in many different ways to meet specific business requirements
  - One SALES OFFER PACKAGE may bundle multiple products

□E.g. Plusbus = Rail ticket + Bus day pass

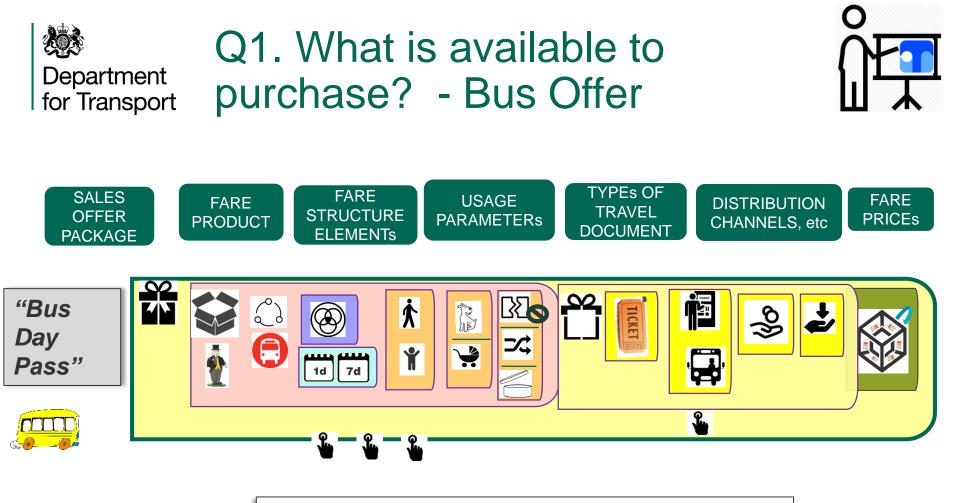
- The same product may be in used in many SALES OFFER PACKAGEs
  - E.g. Rail ticket by itself or in Plusbus bundle
  - □E.g. Mobile App ticket or paper Ticket
  - **E.g.** Same rail ticket sold by different operators







A set of permissible options for rail tickets on the W-to-Z line

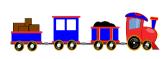


A set of permissible options for bus tickets



### Q2 What do I actually buy?

Parameters for electronic ticket data



#### Rail Trip Purchase;

- □ Single Trip from X to Y,
- One Adult, 1<sup>st</sup> Class, (Small animal allowed free).
- □ Valid only on **Off peak** Trains (Leaving X after 9.30)
- □ As Mobile App ticket bought on-line with a credit card
- □ Price = 20 Euros



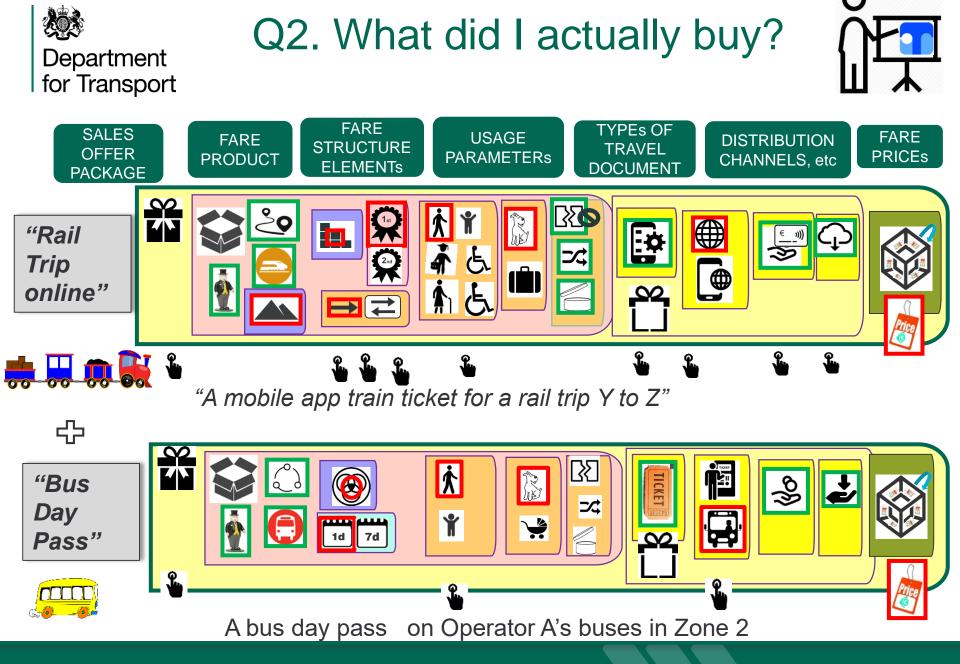
- Bus Trip Purchase;
  - Day Pass for Zone 2,
  - One Adult, (Small animal allowed free)
  - □ Valid till end of fare day (2am) on all buses from Operator A

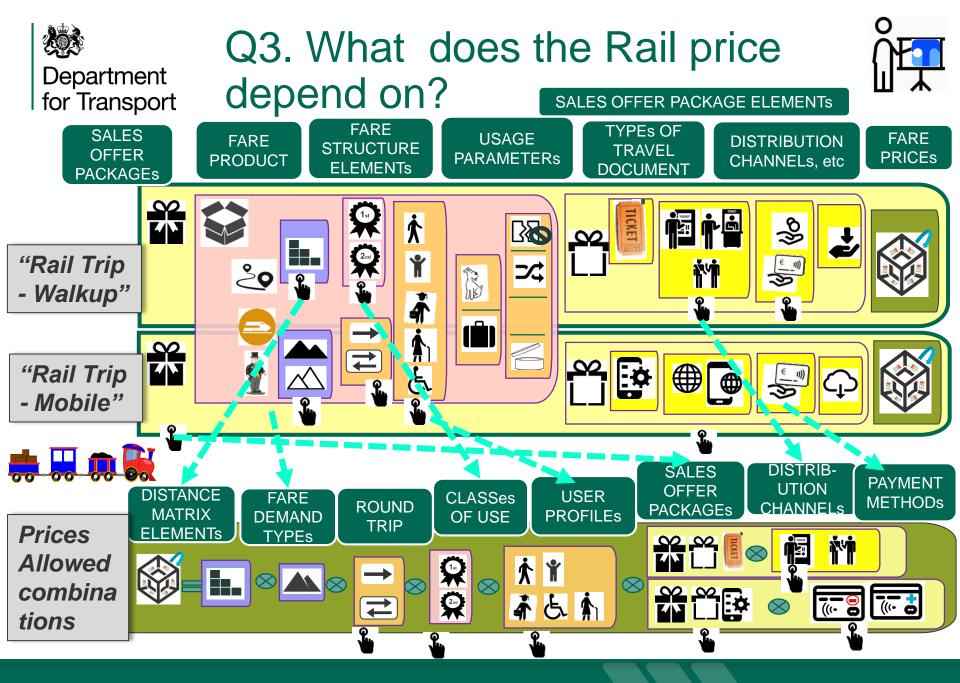
- As Paper ticket bought from Driver with cash
- Price = 3 Euros

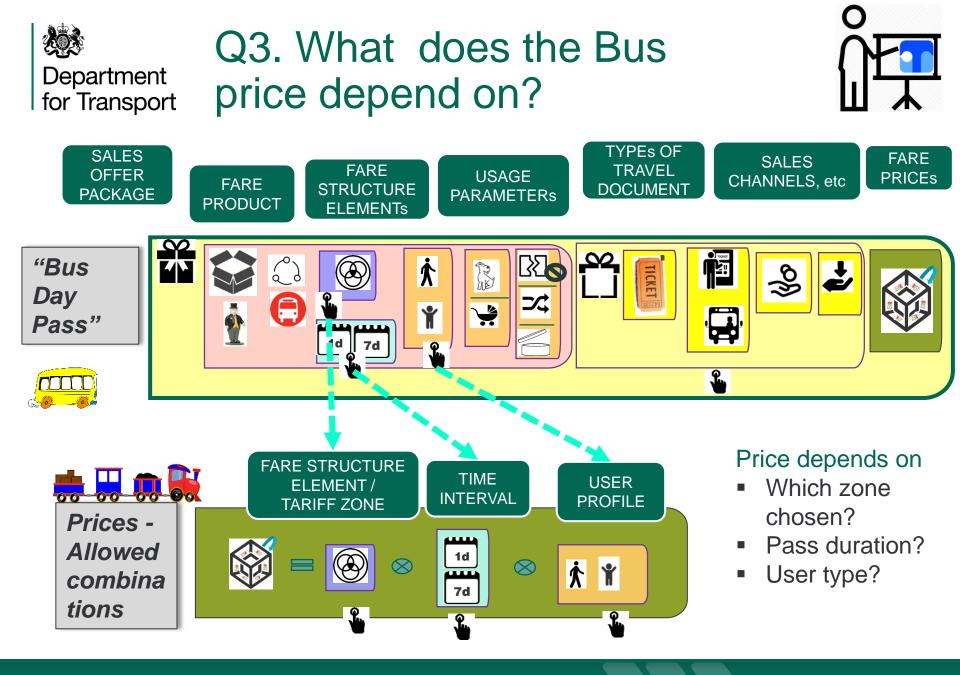


→ **→** <sup>1</sup> \* <sup>3</sup>/<sub>1</sub> ▲ **→** 

Price









## Different ways we might market exactly the same product elements

- 1. Separate Rail and Bus offers, no discount, separate travel documents
  - **※**{ [□ Rail leg], **■ticket** ] } + **※**{ [ □Bus leg], **■**ticket ] }
  - See example above
- 2. Single "Plusbus" offer, discounted, separate travel documents
  - ※{ [□Rail leg, □ticket ] + [□Bus leg, □ticket ] }
  - See next example below "A Single offer, Rail & Plusbus together"
- 3. Single "Plusbus" offer, discounted, single travel document
  - **※**{ [ □Rail leg ] + [□Bus leg, ∎ticket ] }
- 4. Separate purchase "Plusbus" as a later add on, discounted price, separate travel documents
  - ※{ [□Rail leg, ■ticket ] + [□Bus leg, ■ticket ] }
  - See example below "bundled products purchased separately"



### Bundling two products as a single offer





#### Rail Trip Product;

Department for Transport

- Tariff Structure: P2P,
- Access Rights: Trip, Single or Return, 1<sup>st</sup> or 2<sup>nd</sup> Class
- Fare Demand Types: Peak or | off Peak
- User Profiles: Adult, Child, Student; Senior, handicapped (different prices)
- **Conditions:** Cannot break journey; No interchange; Not Transferable)
- Luggage Allowance: Pets, 3 Suitcases free

#### Plusbus Offer; Walk up

- Available: At stop (at discount), or on-board (no discount);
- Pay with: cash or card (at stop only).
- Travel Document: Printed ticket;

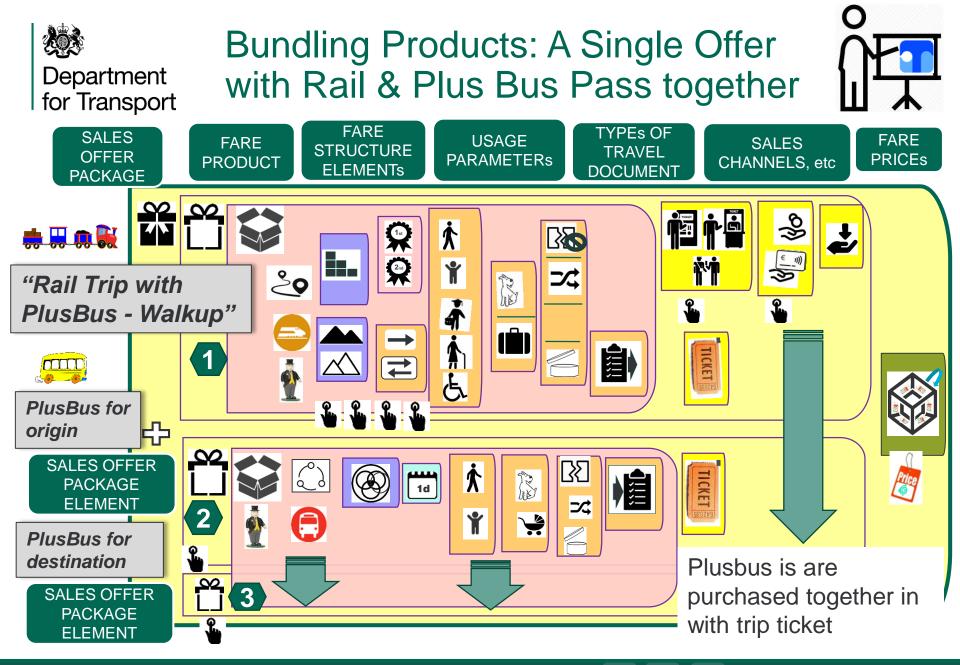
#### Bus Trip Product;

- Tariff Structure: Named Zones,
- Access Rights : Day Pass, till end of Fare day (2am)
- Fare Demand Types: Travel at anytime
- User Profiles: Adult, Child (different prices)
- **Conditions:** Can break journey; Can interchange; Transferable)
- Luggage Allowance: Pets, Prams free

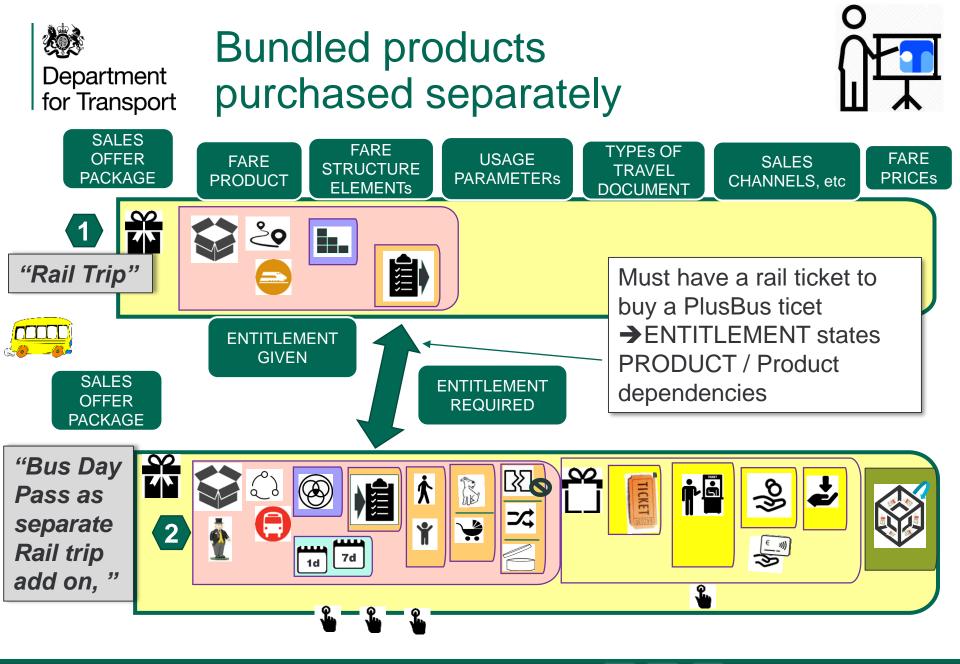
#### Plusbus Offer; Online,

- Available: online (at extra discount)
- Pay with: debit card or credit card (extra fee) only
- Travel Document: Mobile app







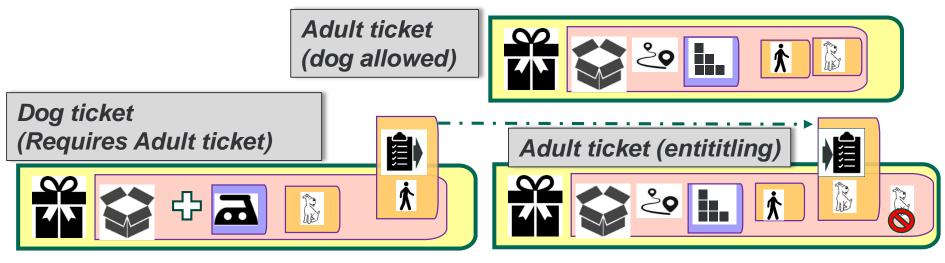






What about the dog? Packaging as a Supplements product versus packaging as product parameters

- 1. Dog allowed as "baggage"
- 2. Dog requires separate ticket with its own travel document





105

### Another common bundle: Seat Reservation Supplements Bundled and /or unbundled

- 1. Separate Rail Seat Reservation, separate travel & seat documents
- 2. Rail leg includes Seat reservation, separate travel & seat documents
  - 1. **%**{ [□Rail leg, **bicket**] + [□Rail Seat Reservation, **bicket**] }
- 3. Rail leg includes Seat reservation, single travel document

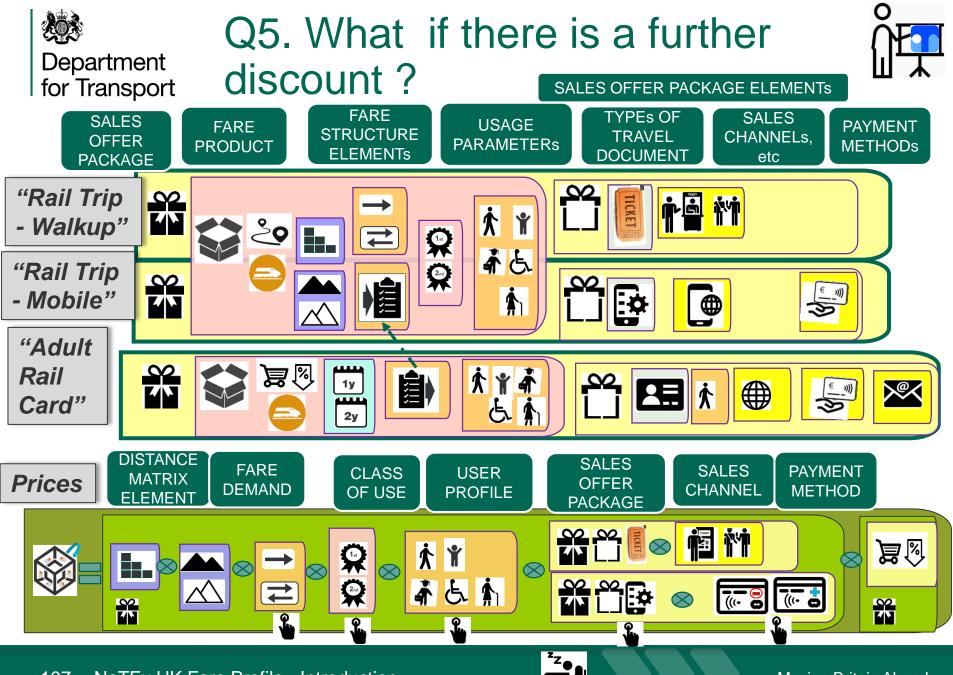




## Further ways we might market the same product elements

- 1. "Railcard" Purchased right to buy another product at a discount Additional discount separate travel documents
  - a) 😹 { [ □Sale Discount Right], 
    membership card ] }
  - b) Each purchase of **¾**{ [ □Rail leg, (at reduced price], **Bticket** ] }
- 2. "Frequent Flyer" Usage based rebate, either as rebate or discounted price

  - b) Each purchase of **%**{ [ **□Rail leg, (also has value in mileage points], ticket ]** }



107 NeTEx UK Fare Profile - Introduction



## Modelling Bus Fares - a component based analysis of some simple examples

- Single Trip, Point to Point Tariff Structure
  - Multiple User types
  - Derived prices
- Period Passes, Zonal Tariff Structure
  - Day, Season
  - Multi channel
- Multi-trip Carnet, Zonal Tariff Structure
  - Multiple User types
- Trip, Section Count Zonal Tariff Structure



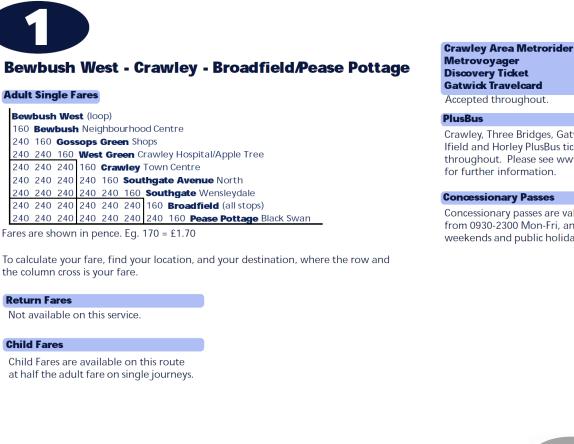


## UK Bus Example: A Point to Point Fare

109 NeTEx UK Fare Profile - Introduction



## Metrobus 1 - Single ride



**Gatwick Travelcard** 

Accepted throughout.

Crawley, Three Bridges, Gatwick Airport, Ifield and Horley PlusBus tickets are valid throughout. Please see www.plusbus.info for further information.

#### **Concessionary Passes**

Concessionary passes are valid throughout from 0930-2300 Mon-Fri, and anytime at weekends and public holidays.

24.01.17

Metrobus Ltd, Wheatstone Close, Crawley, West Sussex, RH10 9UA. Tel: 01293 449191



#### © Metrobus 2018

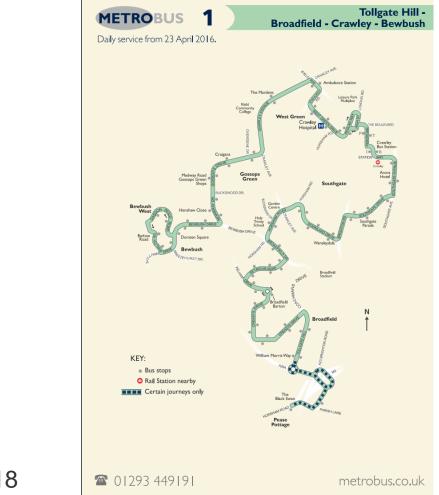
#### https://www.metrobus.co.uk/route-information/1





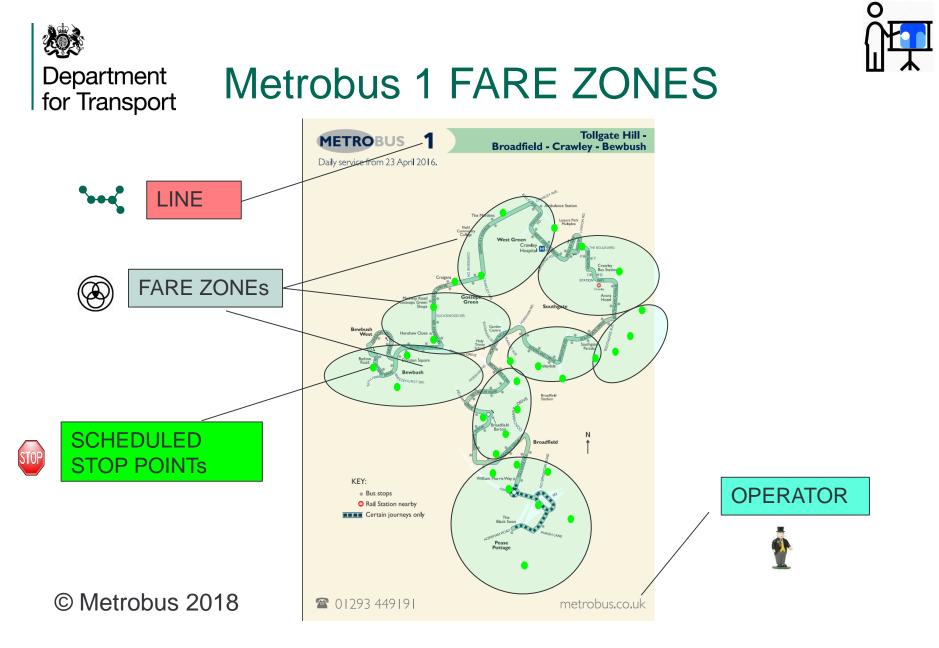


## Metrobus 1 FARE ZONES



© Metrobus 2018

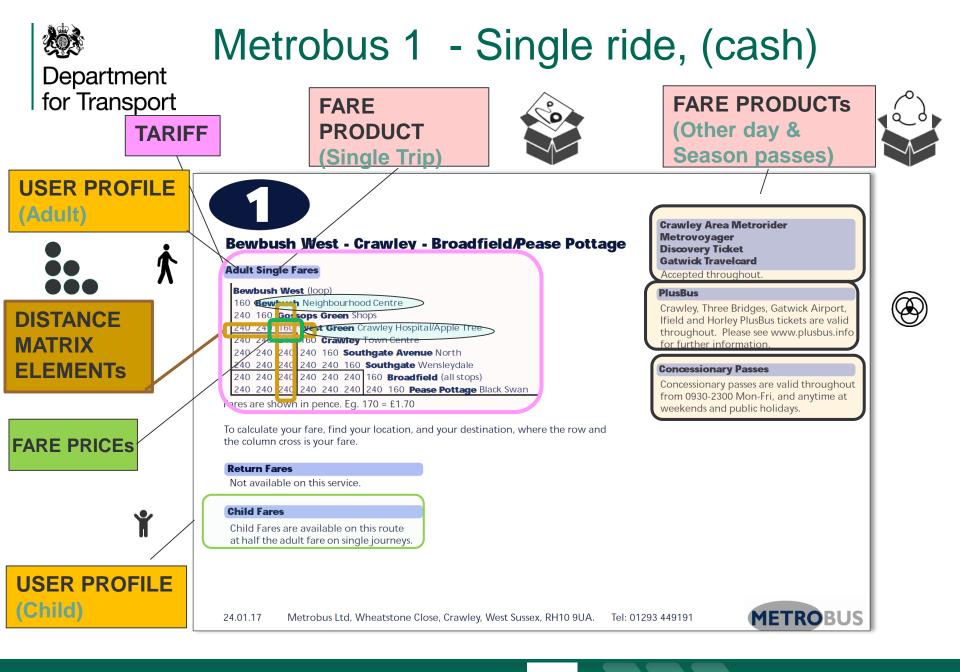
Department for Transport



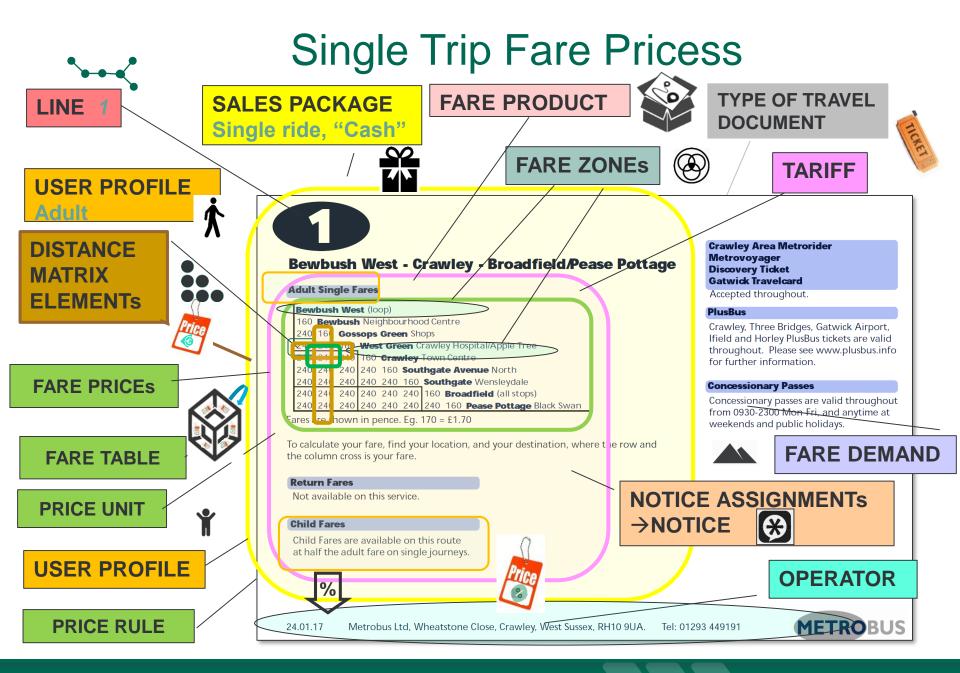


# Analysing the Metrobus Line 1 offer

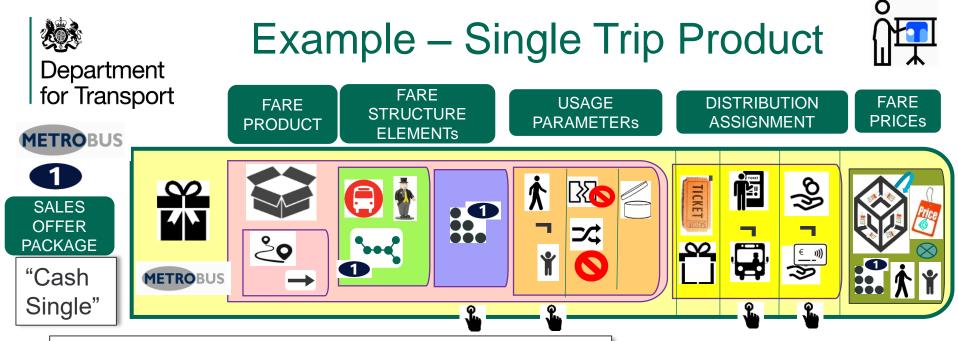
- Access Rights
  - Zone To Zone : Each zone covers several stops
  - Line: Line 1
  - Operator: Metrobus
- Products
  - Single product a single Trip
  - User types: Adult, Child (5-15) 50%,
- Sales Offer packages
  - ▶ Travel Documents: paper,
- Pricing
  - O/D zone x User Profile
- Other products available eg day pass, season pass, etc



114 NeTEx UK Fare Profile - Introduction



#### 115 NeTEx UK Fare Profile - Introduction



#### Offer; "Metrobus cash ticket"

- Tariff Structure: Zone to Zone;
- Product Access rights: single trip; bus, Operator=Metrobus, Line1
- User Profiles: Adult, Child,
- Conditions: Cannot break journey; Cannot interchange; Refundable?
- Travel Document: Printed "Cash ticket";
- Available: at stop, or on-board (no discount);
- Pay with: cash or card
- Prices : Line1 x (n x n Z2Z elements) x (Adult | Child)
- Brand = Metrobus

#### 116 NeTEx UK Fare Profile - Introduction

#### Travel Specification;



- Which Zones?
  - Origin + Destination



- Which User Profile?
  - (Adult | Child)

#### **Purchase options**

- Where?
  - At stop | on-board
- Pay How?
  - Cash | Card



## UK Bus Example: Some Period Passes (Day & Season)

117 NeTEx UK Fare Profile - Introduction

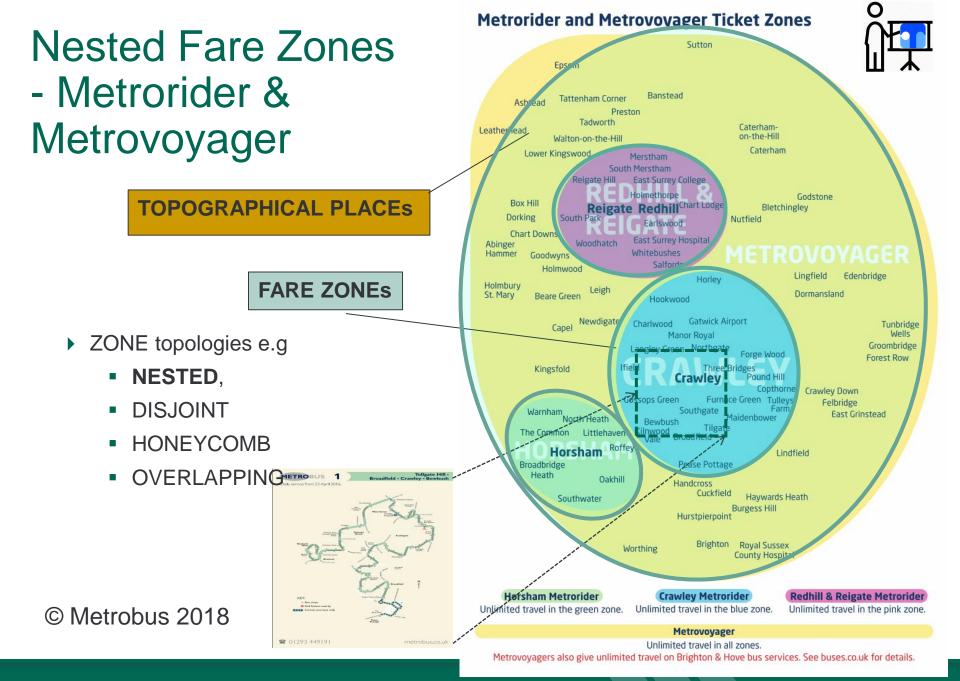
## **SEASON PASS - Metrorider**

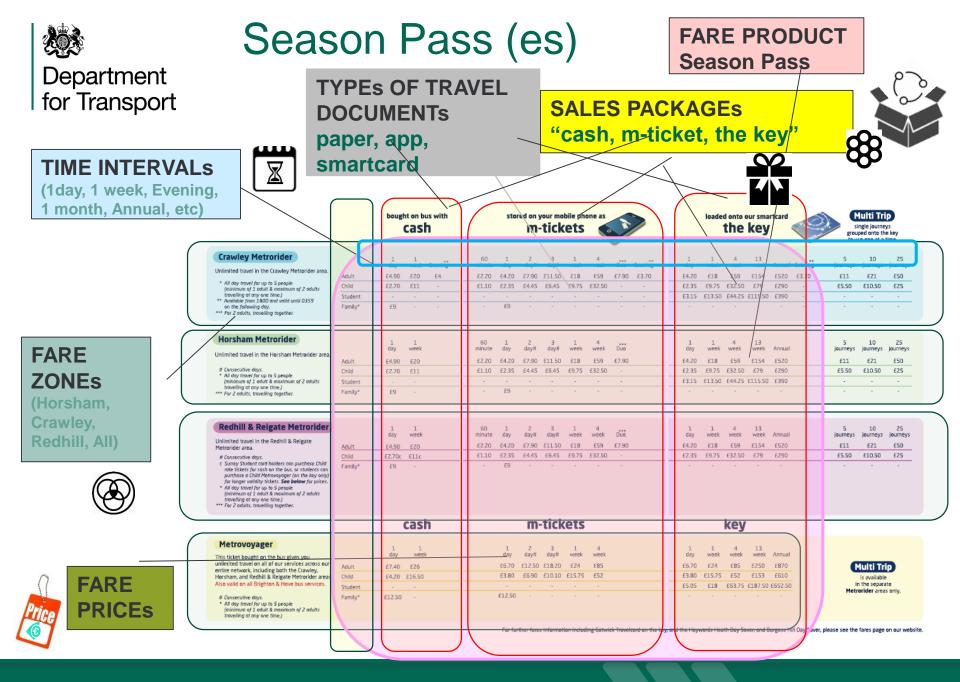


# Department for Transport

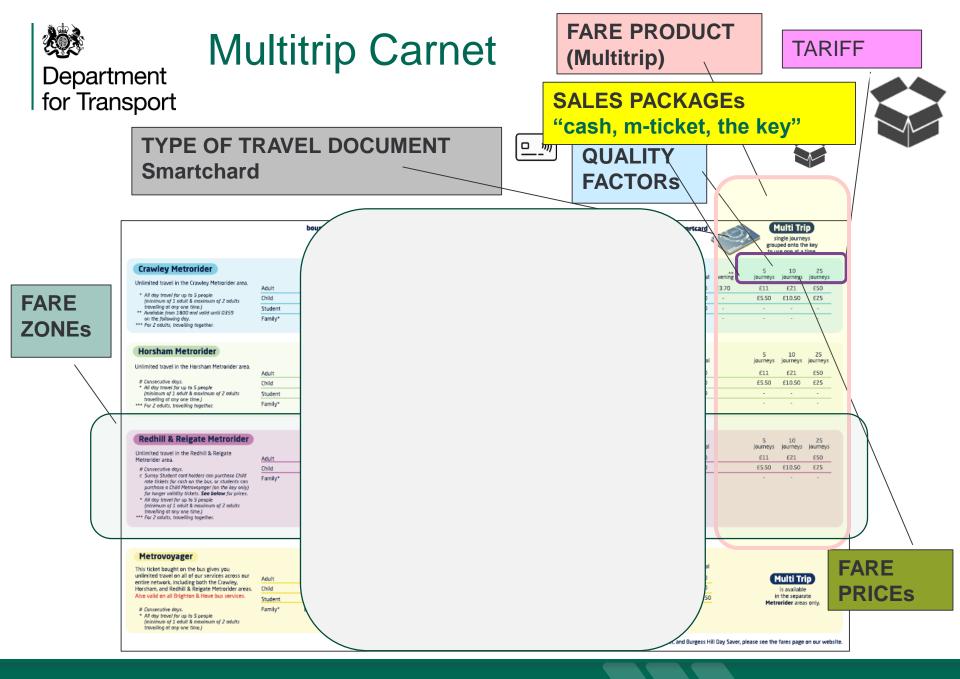
		bought on bus with				stored on your mobile phone as m-tickets									the key where the second secon							
Crawley Metrorider Unlimited travel in the Crawley Metrorider area. * All day travel for up to 5 people (minimum of 1 odult 8 maximum of 2 odults travelling of any one time.) * Available from 1800 and valid until 0359 on the following day. *** For 2 odults, travelling together.	Adult Child Student	1 day £4.90 £2.70	1 week £20 £11	Evening E4 -	60 minute £2.20 £1.10	1 day £4.20 £2.35	2 day# £7.90 £4.45	3 day# £11.50 £6.45	1 week £18 £9.75	4 week £59 £32.50	Duo €7.90 -	Evening £3.70 -	1 day £4.20 £2.35 £3.15	1 week £18 £9.75 £13.50	4 week £59 £32.50 £44.25		Annual £520 £290 £390	Evening £3.70 -	5 journeys £11 £5.50 -	10 journeys £21 £10.50	25 journeys E50 E25 -	
	Family*	£9	-	•	-	£9	-	-		-	-	-	-	-	-	-	-		-	-	-	
Horsham Metrorider Unlimited travel in the Horsham Metrorider area.	Adult	1 day £4.90	1 week £20		60 minute E2.20	1 day £4.20	Z day# £7.90	3 day# E11.50	1 week £18	4 week E59	Duo E7.90		1 day £4.20	1 week £18	4 week £59	13 week £154	Annual £520		5 journeys £11	10 Journeys E21	25 journeys £50	
# Consecutive days. • All day travel for up to 5 people (minimum of 1 adult & maximum of 2 adults traveling at any one time.)	Child	£2.70	£11		£1.10	£2.35	£4.45	£6.45	£9.75	£32.50			£2.35	£9.75	£32.50	£79	£290		£5.50	£10.50	£25	
	Student	-			-	-		-	-	•	•		£3.15	£13.50	£44.25	£115.50	£390		-	-		
*** For 2 adults, travelling together.	Family*	E9	-			£9																
Redhill & Reigate Metrorider Unlimited travel in the Redhill & Reigate Metrorider area. # Consecutive doys. C Surrey Student card holders can purchase Child rate tickers for cash on the bas, or students can par lange unlikely tickets. See form the key only par lange unlikely to be the partice. *** For 2 adults, travelling together.		1 day	1 week		60 minute	1 day	2 day#	3 day#	1 week	4 week	Duo		1 day	1 week	4 week	13 week	Annual		5 journeys	10 journeys	25 journey:	
	Adult	£4.90	£20		£2.20	E4.20	£7.90	£11.50	£18	£59	£7.90		£4.20	£18	£59	£154	£520		£11	£21	£50	
	Child	£2.70c	£11c		£1.10	£2.35	£4.45	£6.45	£9.75	£32.50			£2.35	£9.75	£32.50	£79	£290		£5.50	£10.50	£25	
	Family*	69				£9		-	-	-				-	-	-	-					
			ast	1 I			m	-tick	ets						key							
Metrovoyager This ticket bought on the bus gives you unlimited travel on all of our services across our entire network, including both the Crawley, Horsham, and Redhill & Reigare Metrorider areas. Also valid on all Brighton & Hove bus services.		1 day	1 week			1 day	2 day#	3 day#	1 week	4 week			1 day	1 week	4 week	13 week	Annual					
	Adult	£7.40	£26			£6.70	£12.50	£18.20	£24	£85			£6.70	£24	£85	£250	£870		•	1ulti Tri	ip	
	Child	£4.20	E3.80 E6.90 E10.10 E15.75 E52							£3.80 £15.75 £52 £153 £610							is available					
	Student	-					-						£5.05	£18	£63.75	£187.50	£652.50			n the separa orider area		
# Consecutive days. <ul> <li>All day travel for up to 5 people (minimum of 1 aduit 8 maximum of 2 adults travelling at any one time.)</li> </ul>	Family*	£12.50	-			£12.50	-	-	-	-				-	-	-	-			and all the	o only.	
						For fu	ther fare	s informat	ion includ	ling Gatwi	ck Travelo	ard on the key	, and the Hay	wards Hea	rth Day Sa	iver, and E	Burgess Hi	ill Day Saver, p	lease see the	fares page	on our we	

#### © Metrobus 2018





#### 120 NeTEx UK Fare Profile - Introduction



#### 121 NeTEx UK Fare Profile - Introduction



## Analysing the Metrorider offer – Period Passes

#### Access Rights

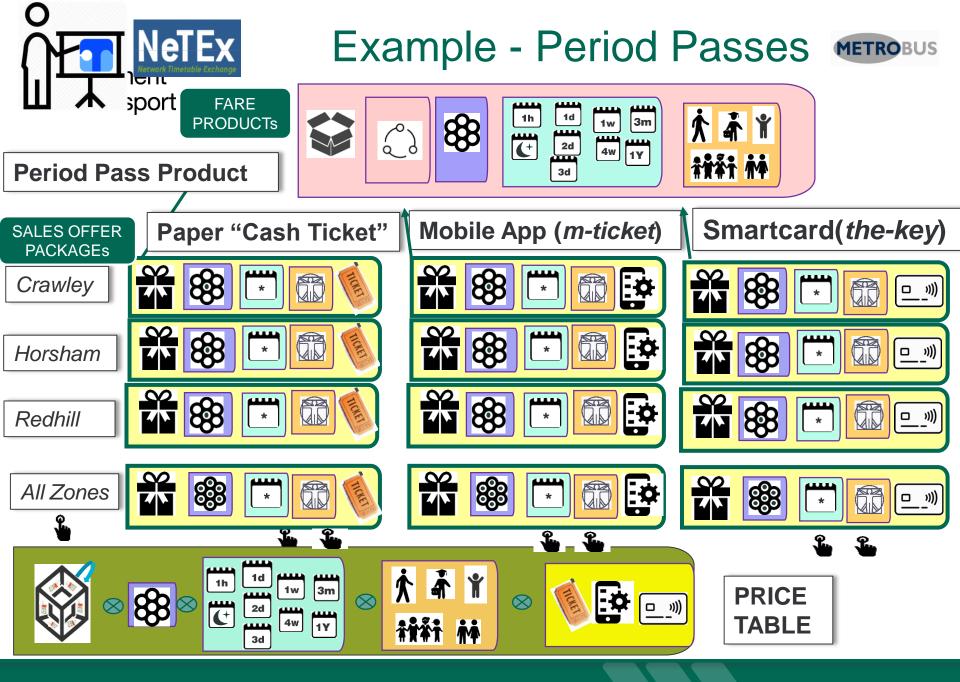
- > Zones : Single (*Crawley, Horsham, Redhill*) or All
- Durations: Evening, 1,2,3 Day(s), 1,4 Week(s), Annual
- Operator: Metrobus

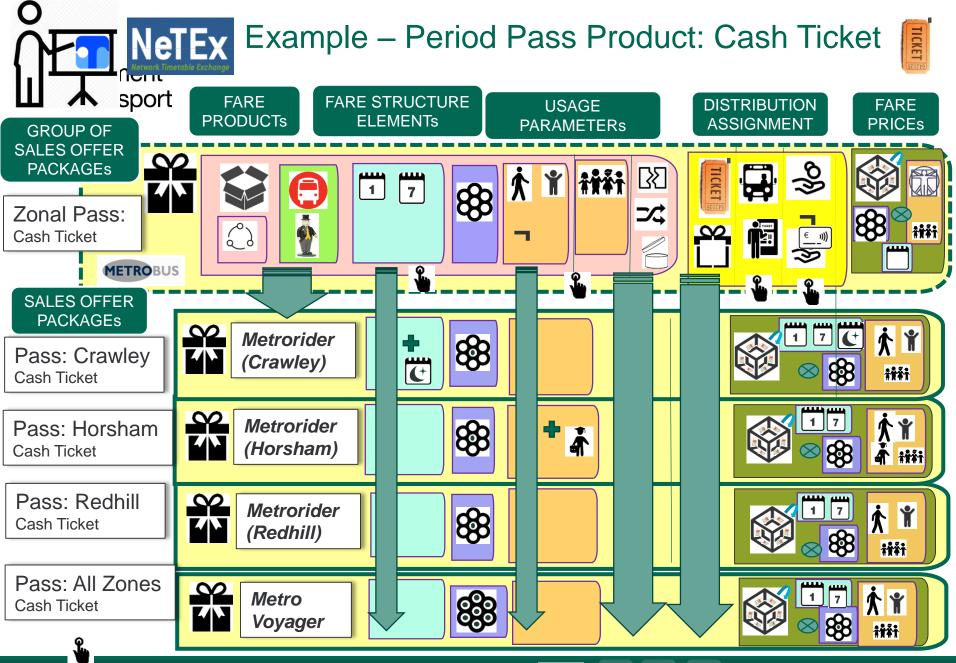
#### Products

- Single product a period pass within a specified zone
- User types: Adult, Child, Student
- Group Tickets: Family, Duo

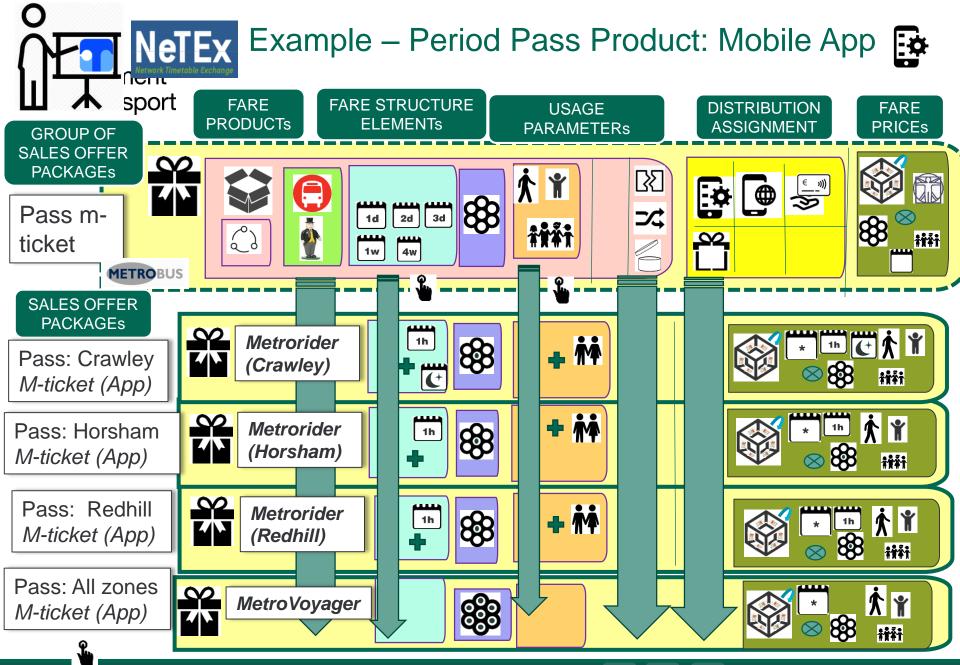
#### Sales Offer packages

- ▶ Travel Documents: paper, app, smartcard
- > 12 different combinations : 4 zone choices x 3 ticket choices (paper, app, smartcard)
- Minor variations in available pass durations, User types etc between packages
- Pricing
  - Zone x Period x [User Profile|Group Ticket] x Sales Package (per Travel Document)

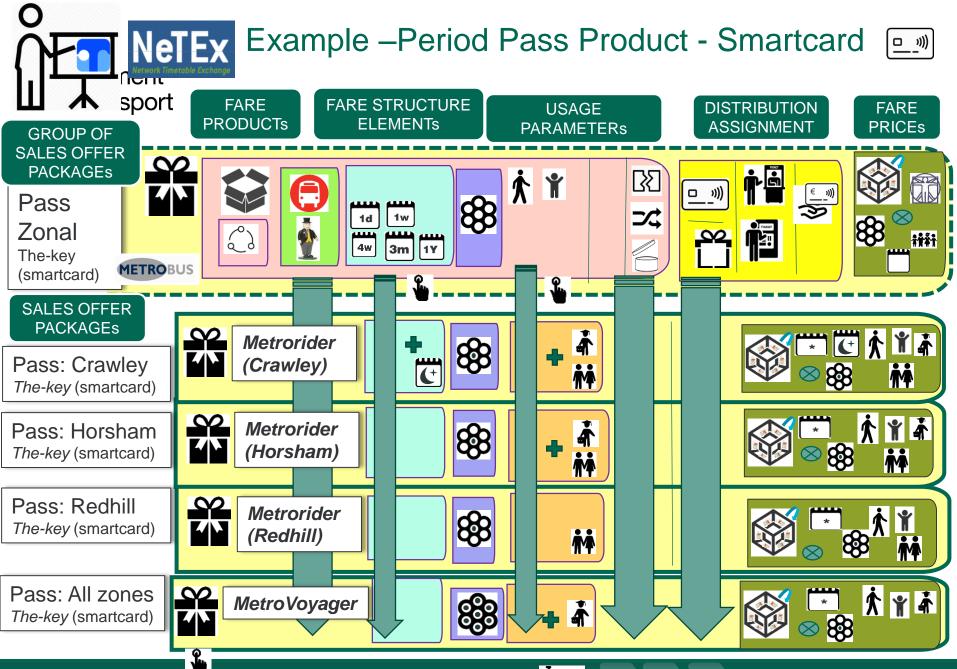










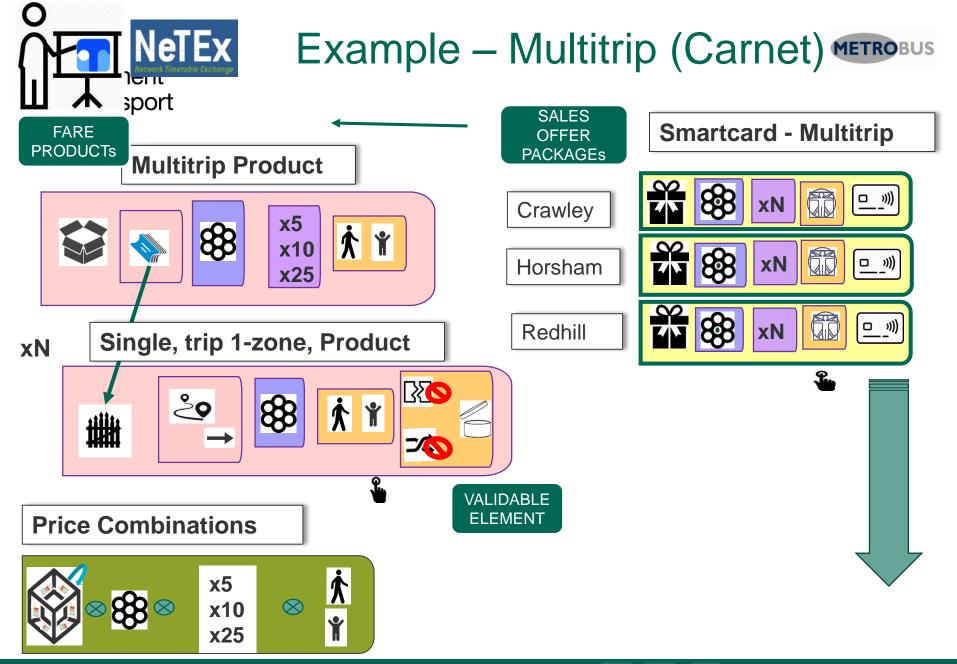






# Analysing the Metrorider offer – Carnets

- Access Rights
  - A single zone (*Crawley, Horsham, Redhill*)
- Products
  - Single product a carnet for a specified number of trips
  - Available quantities: 5, 10, 25
  - User types: Adult, Child
  - Use by date
  - Purchase Window: Before 21:00 on previous day
- Sales Offer packages
  - Travel Document: smartcard only
  - 3 different combinations : 3 zone choices
- Pricing
  - Zone x Number of Trips x [User Profile]









## UK Bus Example: A Unit Section or "Stage" Fare

130 NeTEx UK Fare Profile - Introduction



© First

Group

2018

## \_\_\_\_\_



### Stage /Section Count Fares

Does not matter which section, just the number of sections.

#### Single tickets

The cost of single tickets within the West of England will be based on the route distance you travel, with five single fares available:

#### Up to three miles Adult from £2 from £1.40 16-21 year old/student Child aged 5-15 from £1 Three to six miles Adult from £3 16-21 year old/student from £2.10 from £1.50 Child aged 5-15 Six to nine miles Adult from £4 16-21 year old/student from £2.80 Child aged 5-15 from £2 Nine to twelve miles Adult from £5 16-21 year old/student from £3.50 Child aged 5-15 from £2.50 • Over twelve miles from £6 Adult 16-21 year old/student from £4.20 Child aged 5-15 from £3

#### How is your single fare calculated?

#### Distance-based fares for the West of England

In the West of England (excluding Bath Inner and Weston-super-Mare Town Zones – see pages 6 and 14) your single fare is worked out based on the route distance you are travelling.

Distances are calculated using fare stage sections rather than individual bus stops, with each section being approximately one mile long\*.

If you travel in 1-3 mile long sections it'll be £1.50, 4-6 mile long sections will be £2.50 and so on.

#### Here is an example of one route and some of the fares along it:

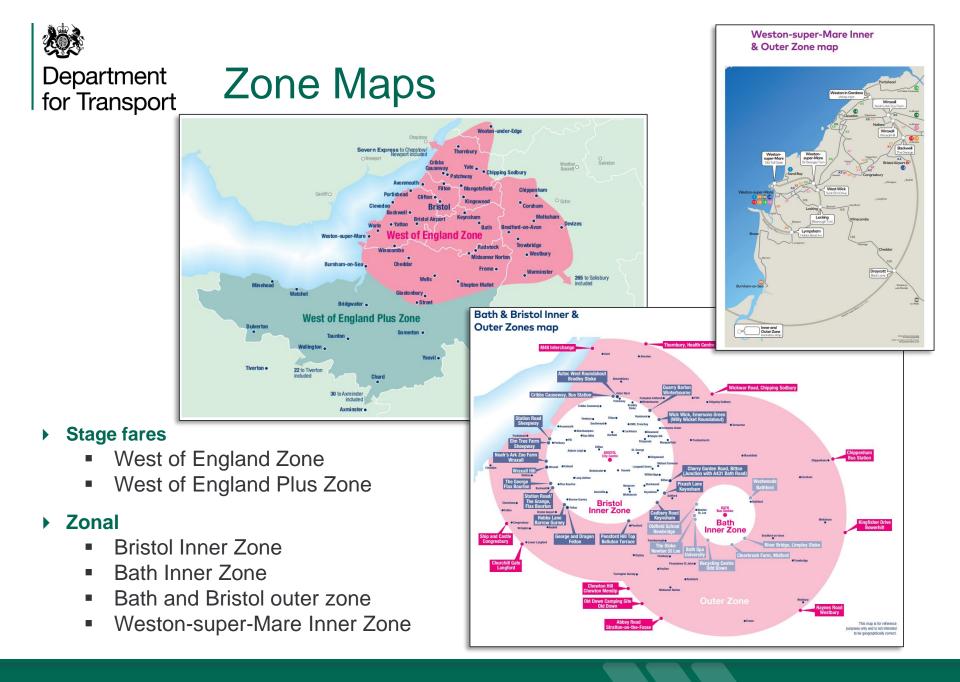
Emersons Green, Sainsbury's to Long Close would be £1.50 as you are travelling in three sections (numbers 1, 2 and 3, Long Close is classed as section 3 in this example as it's where you are getting off the bus).

Long Close to Narroways Road would be £2.50 as you are travelling in four sections (4, 5, 6, 7, Long Close is counted as section 4 in this example as it's your boarding point).

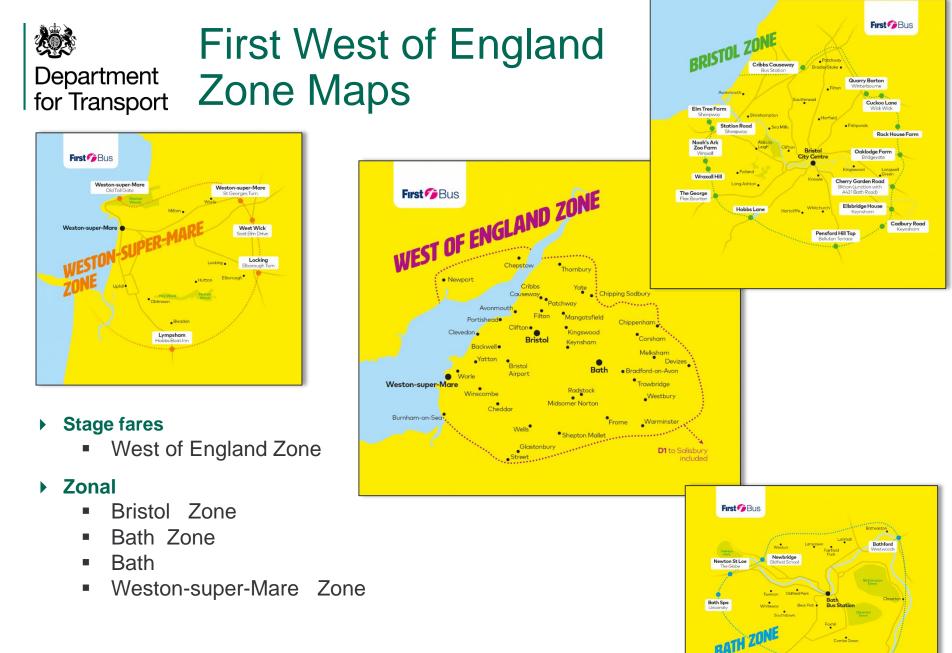
Blackberry Hospital to Downend, The Leap would be £2.50 as you are travelling in four sections (5, 4, 3, 2).



Non-bold names - All other bus stops



#### 132 NeTEx UK Fare Profile - Basic Scope



#### 133 NeTEx UK Fare Profile - Basic Scope

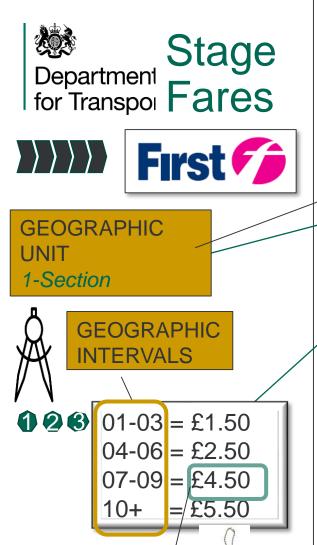
Midford Clearbrook Fo



## Analysing the First Bristol offer – Section based trip tariff

- Access Rights
  - Sections : Defined by stages along route
  - Intervals : 1-3, 4-6, 7-9, 10+ Units (Notional miles)
  - Operator: First
- Products
  - Single product a single Trip
  - User types: Adult, Child (5-15) 50%, Student (16-21) 30%
- Sales Offer packages
  - Travel Documents: paper, app (m-ticket)
- Other products available eg day pass, season pass

https://www.firstgroup.com/uploads/node\_images/Fares%20Guide%20%28May18%29.pdf



© First Group 2018

**FARE PRICEs** 

#### How is your single fare calculated?

#### Distance-based fares for the West of England

In the West of England (excluding Bath Inner and Weston-super-Mare Town Zones – see pages 6 and 14) your single fare is worked out based on the route distance you are travelling.

Distances are calculated using fare stage sections rather than individual bus stops, with each section being approximately one mile long\*.

If you travel in 1-3 mile long sections it'll be £1.50, 4-6 mile long sections will be £2.50 and so on.

#### Here is an example of one route and some of the fares along it:

Emersons Green, Sainsbury's to Long Close would be £1.50 as you are travelling in three sections (numbers 1, 2 and 3, Long Close is classed as section 3 in this example as it's where you are getting off the by

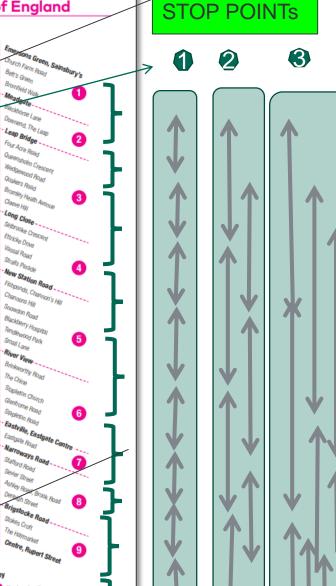
Long Close to Narroways Road would be £2.50 as you are travelling in four sections (4, 5, 6, 7, Long Close is counted exection ( is this sumple as it's **Stage Points** 

Black d, The L<del>eap would be ±2.50 as you</del> are

FARE

travelling in four sections (5, 4, 3, 2)

**SECTIONs** 



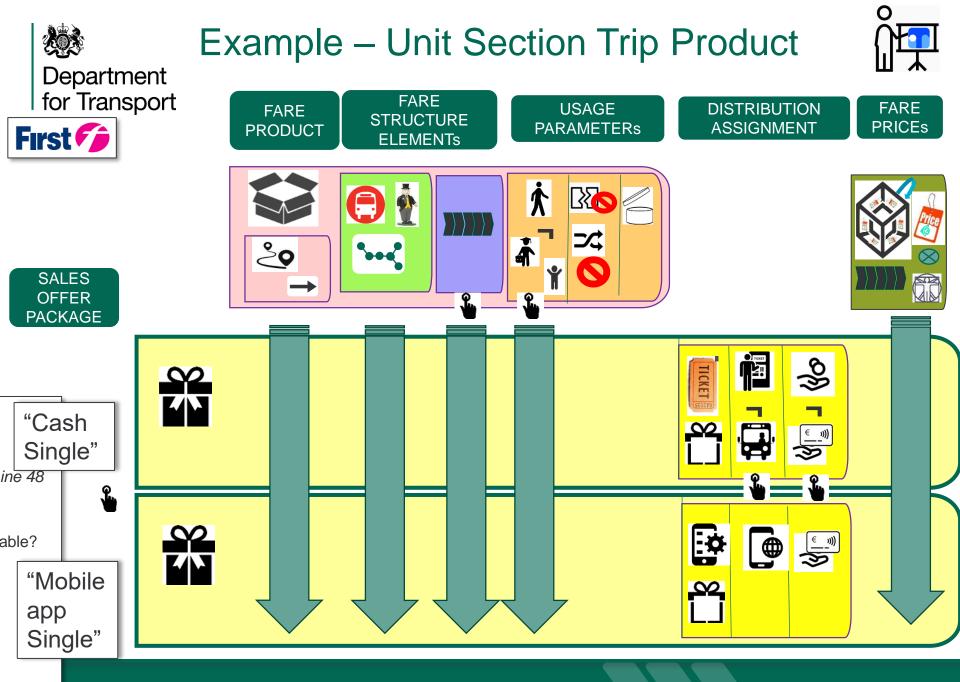
Section boundary stop ban be counted in either

n-hold names - All other hus store

SCHEDULED

Moving Britain Ahead

135 NeTEx UK Fare Profile - Introduction







## Routes for which multiple Tariffs are applicable?

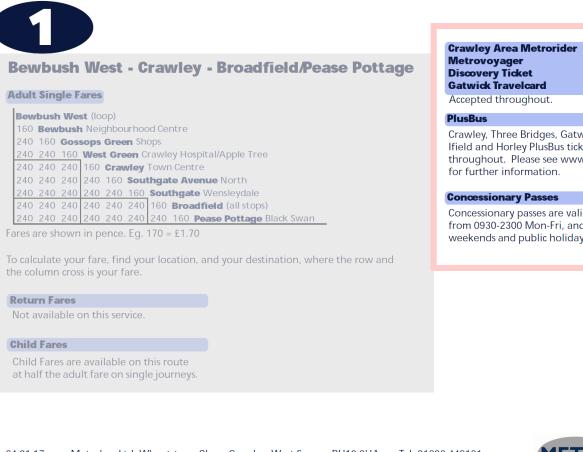
## Products valid on Multiple Operators?



# О

#### Department for Transport

## Metrobus 1 - Other Tarifffs



Crawley, Three Bridges, Gatwick Airport, Ifield and Horley PlusBus tickets are valid throughout. Please see www.plusbus.info

Concessionary passes are valid throughout from 0930-2300 Mon-Fri, and anytime at weekends and public holidays.

24.01.17

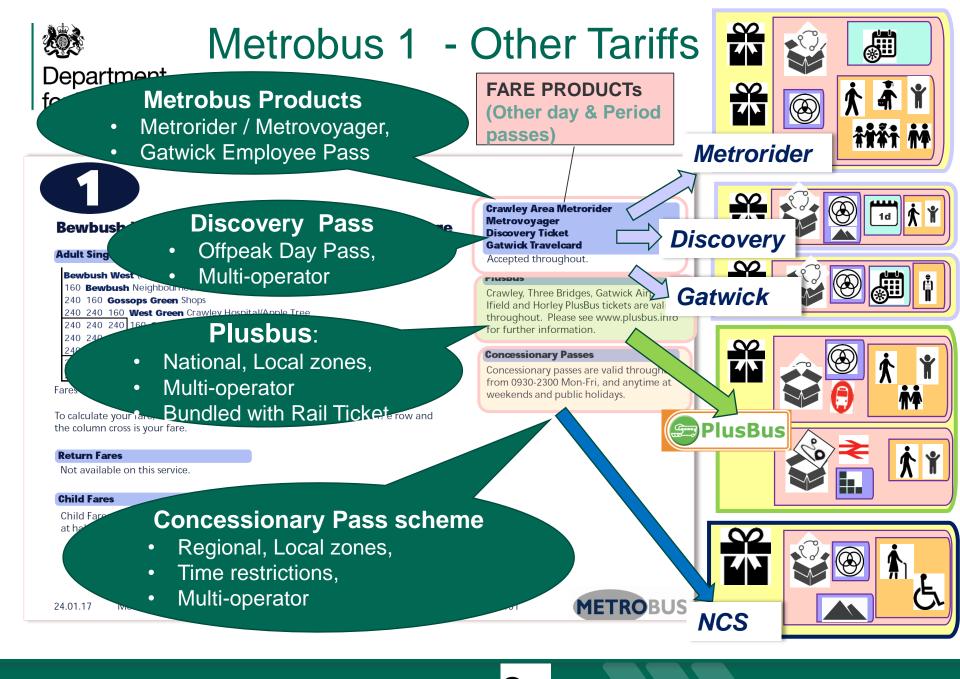
Metrobus Ltd, Wheatstone Close, Crawley, West Sussex, RH10 9UA. Tel: 01293 449191

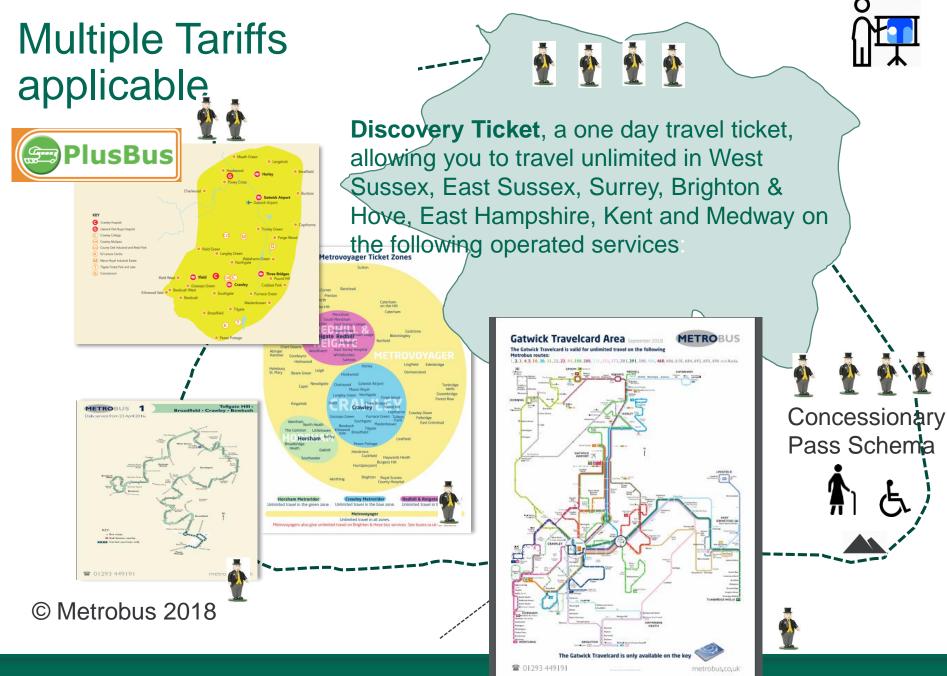


#### © Metrobus 2018

#### https://www.metrobus.co.uk/route-information/1

#### 138 **NeTEx UK Fare Profile - Introduction**

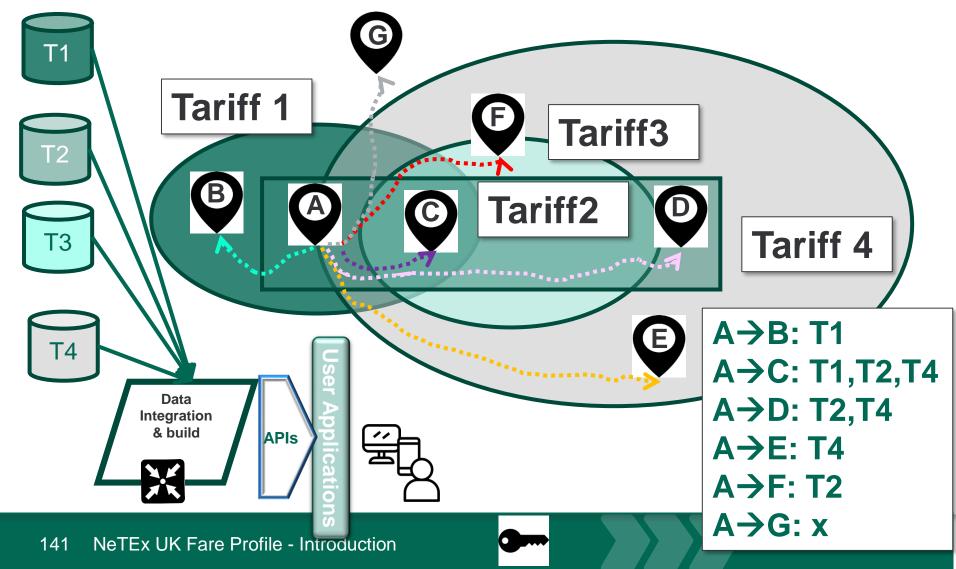




140 NeTEx UK Fare Profile - Introduction



Each tariff describes itself; it is the trip planner/ fare engine's task to find the applicable, best value fares for given trip





### Visualisation of Multiple Tariffs: Dresden - Wroclaw







*Trilex Tageskarte* tariff: is an off-peak flat rate **day pass** available for journeys crossing the region, and also to go to Liberec (CR). Group discounts are available.



*Dresden-Wroclaw-Spezial* is a special discounted **period return trip** fare valid on a crossborder route between Dresden (DE) and Wroclaw (PL). Group discounts are available.



*Katzensprung* tariff is an off-peak tariff offering **day passes** at two different rates for different sections; only within Saxony, only for the specified routes.



VVO (Verkehrsverbund Oberelbe), and ZVON (Zweckverband Verkehrsverbund Oberlausitz-Niederschlesien) tariffs are regional P2P tariffs only available on certain parts of the network. Regional expresses (E.g. RE 20, RB61) cost more than regular trains.



Saxony tariff is a regional off-peak day pass offered by Deutsch Bahn and usable as far as the border. Group discounts are available.



Bahn tariffs are standard P2P rail tariffs charged by national rail operators such as Deutsche Bahn and Polish Railways; available for all sections of the journey.

### *trilex* Example #3 - Crossborder routes

- Multiple operators.
- Regional cross border tariffs.
- National and operator specific product sets.
- Point to point fares.
- Fare zones.
- Flat fares.
- Group discounts.
- Express trains
- Derived prices with rule steps showing price derivation.
  - Linie RE1, RB60:



- Dresden Bischofswerda Bautzen Löbau Görlitz (-Wrocław/Jelenia Góra)
- Linie RE2, RB61:
  - Dresden Bischofswerda Wilthen Ebersbach Zittau (-Liberec)

#### 143 NeTEx Fares



## **Modelling Prices**

Pricing

144 NeTEx UK Fare Profile - Introduction



## **Fare Prices**

#### Prices are separate from the tariff elements they price.

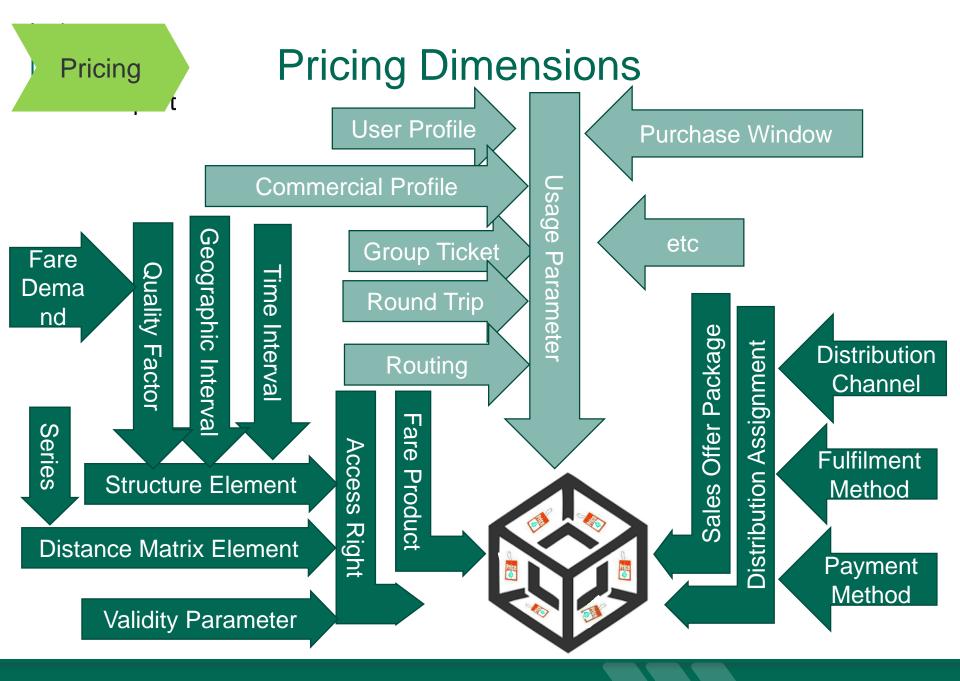
- An element may have different prices with different validities.
- Prices may apply to individual elements or combination of priceable elements



### Different type of prices

- Static / Base Prices
- Prices Derived from Base Prices
- Dynamic Prices (pricing service)
  - Range bands for dynamic prices can be indicated by FARE QUOTA FACTORs

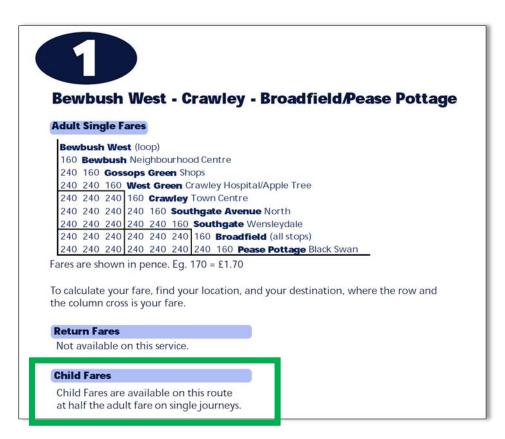






### Department for Transport

## **Derived Prices**



© Metrobus 2018

#### https://www.metrobus.co.uk/route-information/1



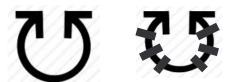
Department for Transport

## Pricing Rules for deriving prices









#### PRICING RULE

- Any arbitrary named calculation
- May be chained
- DISCOUNTING RULE
  - Price is a % or absolute discount or addition

LIMITING DISCOUNTING RULE

Discount with absolute minima and maxima

**ROUNDING** Global parameters

- Round to limit
- Round in steps



# Prices may be absolute or derived

## Base Price

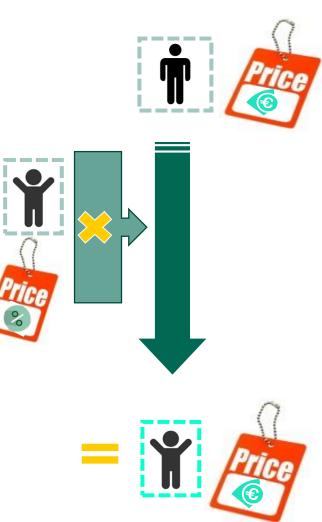
▶ E.g. *Adult =£1.50* 

## Pricing Rule

- Discounting
  - E.g. Child = 50% of Adult
- Limiting
  - Minimum price = 50p
- Cumulative discounts allowed?

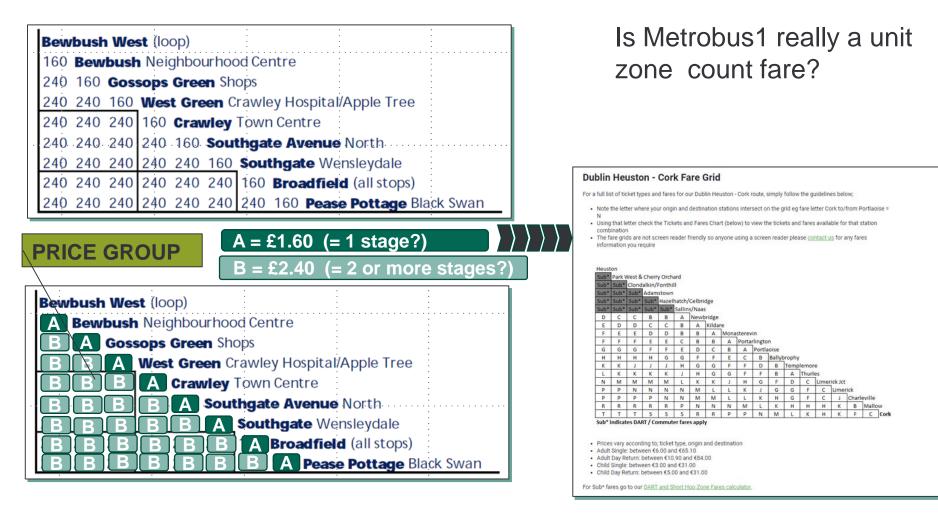
## Derived Price

▶ *E.g. Child* = £0.75





# Prices may be based on a price group



Pricing

etc

### Price data - Absolute









Ť.







OPE RAT OR	SALES PACKAGE	FARE PRODUCT	O/D	CLASS OF USE	USER PROFILE	CHANNEL	TRAVEL DOC TYPE	Price Amount
BR	Trip+AtCounter	Trip	Х→Ү	1st	Adult	Counter	Paper	£20.00
BR	Trip+AtCounter	Trip	X→Y	1st	Child	Counter	Paper	£10.00
BR	Trip+AtCounter	Trip	Х→Ү	2nd	Adult	Counter	Paper	£15.00
BR	Trip+AtCounter	Trip	Х→Ү	2nd	Child	Counter	Paper	£7.50
BR	Trip+MobileApp	Trip	Х→Ү	1st	Adult	Mobile	MobileApp	£18.00
BR	Trip+MobileApp	Trip	X→Y	1st	Child	Mobile	MobileApp	£9.00
BR	Trip+MobileApp	Trip	Х→Ү	2nd	Adult	Mobile	MobileApp	£14.00
BR	Trip+MobileApp	Trip	Х→Ү	2nd	Child	Mobile	MobileApp	£7.00

Separate price given for each possible combination



## Price data – Some Derived

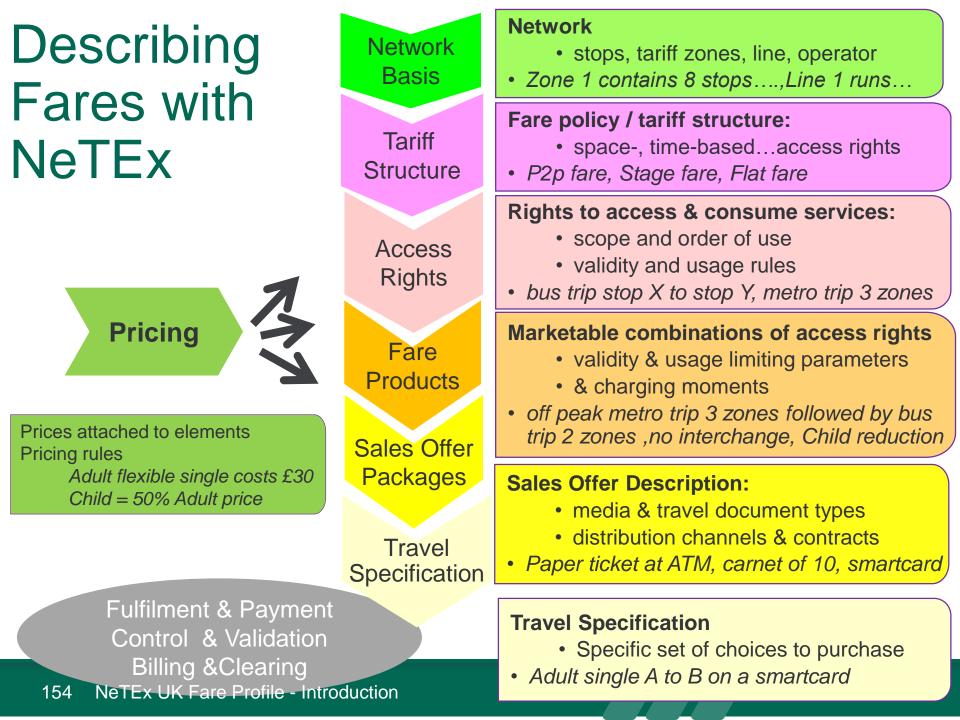
OPER ATOR	SALES PACKAGE	FARE PRODUCT	O/D	CLASS OF USE	USER PROFILE	CHANNEL	TRAVEL DOC TYPE	Amount Or Rule
BR	Trip+AtCounter	Trip	Х→Ү	1st	Adult	Counter	Paper	£20.00
BR	Trip+AtCounter	Trip	X→Y	1st	Child	Counter	Paper	→%Adult
BR	Trip+AtCounter	Trip	Х→Ү	2nd	Adult	Counter	Paper	£15.00
BR	Trip+AtCounter	Trip	Х→Ү	2nd	Child	Counter	Paper	→%Adult
BR	Trip+MobileApp	Trip	Х→Ү	1st	Adult	Mobile	MobileApp	£18.00
BR	Trip+MobileApp	Trip	X→Y	1st	Child	Mobile	MobileApp	→%Adult
BR	Trip+MobileApp	Trip	Х→Ү	2nd	Adult	Mobile	MobileApp	£14.00
BR	Trip+MobileApp	Trip	X→Y	2nd	Child	Mobile	JleApp	→%Adult
	etc							

Some prices are based on others

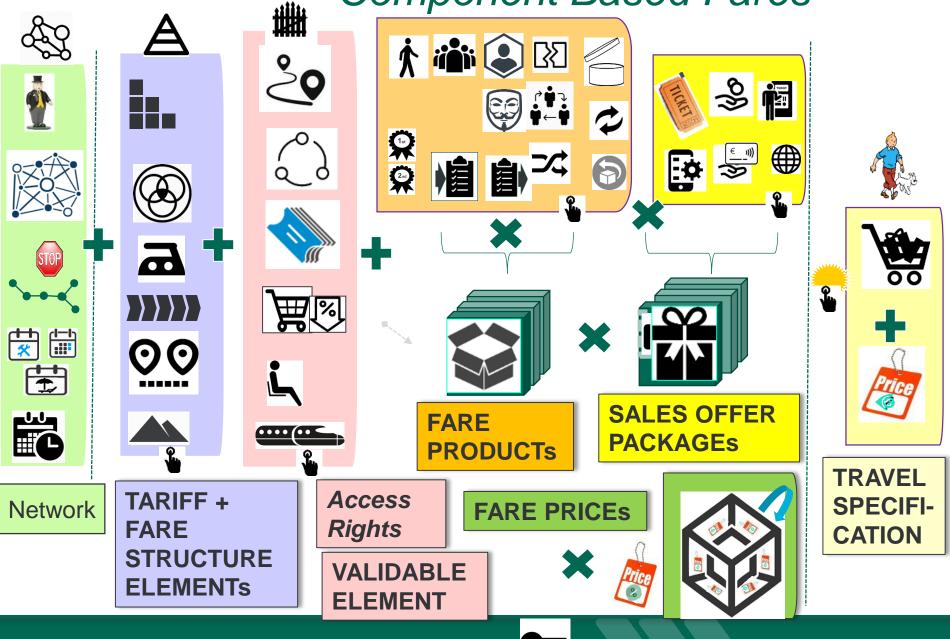


## Summary

153 NeTEx UK Fare Profile - Introduction



## **Component Based Fares**





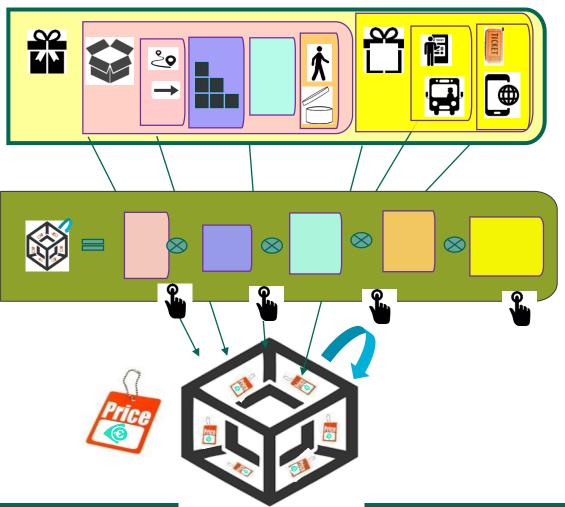


## Some principles for Scoping UK bus tariffs

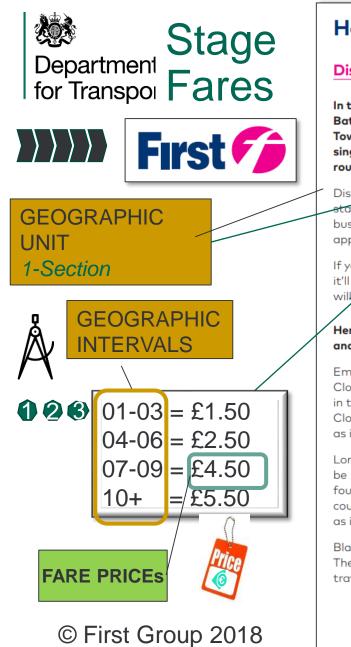
- 1. Every price dimension found in UK bus fares needs a corresponding model element
- 2. There is no single universal way to package fare offers
  - Yet any type of product / offer can be built from a common set of components
- 3. You can exchange the data elements and parameters, but not how they are used
  - E.g. pricing parameters (discounts, rounding)
  - E.g. Combining conditions on tariffs, products and sales offers
- 4. Each product should just define its own tariff
  - It is the trip planner / fare engine's task to find all available tariffs



## Price dimensions



- Anything which is a price dimension for a UK Bus Fare needs to be represented by a model element in the profile
  - E.g. O/Ds, zones, user types, channels, media types, etc
- Anything else is optional
  - E.g. rules for ages of a use type such as child or senior
  - E.g. Locations to buy tickets
- Scope depends on specific tariff structures to be supported



158 NeTEx UK Fare Profile - Introduction

### How is your single fare calculated?

### Distance-based fares for the West of England

In the West of England (excluding Bath Inner and Weston-super-Mare Town Zones – see pages 6 and 14) your single fare is worked out based on the route distance you are travelling.

Distances are calculated using fare stage sections rather than individual bus stops, with each section being approximately one mile long\*.

If you travel in 1-3 mile long sections it'll be £1.50, 4-6 mile long sections will be £2.50 and so on.

#### Here is an example of one route and some of the fares along it:

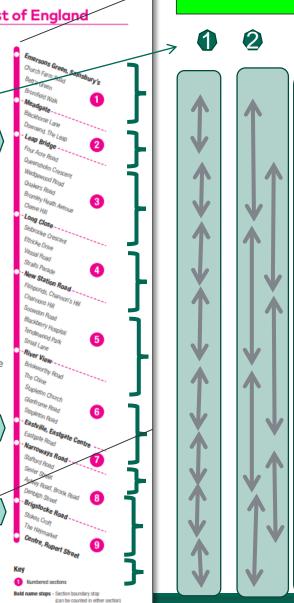
Emersons Green, Sainsbury's to Long Close would be £1.50 as you are travelling in three sections (numbers 1, 2 and 3, Long Close is classed as section 3 in this exart as it's where you are getting off the bus).

Long Close to Narroways Road would be £2.50 as you are travelling in four se is count as it's Stage Points nple

Blackberry nospital to Downend, The Leap would be  $\pm 2.50$  as you are travelling in four sections (5, 4, 3, 2).

**SECTIONs** 

FARF



Non-bold names - All other bus stops

### Moving Britain Ahead

**SCHEDULED** 

STOP POINTs

8







## Benefits of Transmodel / NeTEx Approach to Fares

- **Powerful Component based representation** 
  - Allows many different tariff combinations to be described with the same set of atomic components
  - Allows complex conditions to be expressed
  - Allows necessary packaging of products into different offers
  - Gives highly reusable implementations
- Joined up conceptual model Reuses existing Network & Timetable elements
  - Network (Stops, tariff zones, modes, operators, etc)
  - Timetable elements, servicesetc
  - Temporal conditions and day types, validities

### Robust, Flexible, Extensible Technology

- XML allows selective use, validation integrity checking etc
- UML provides tool supported system documentation
- Conceptual model for Account Based Ticketing and future developments



## Some Drawbacks to a Component based Approach

- Skills Investment needed to understand Concepts & Components
  - Tariff structures, Access rights
  - Uses of different parameters
  - Product and Sales Offer packaging
- Component based semantics require attention to assembly and compounding behaviour
  - Exchange of data does not guarantee exchange of behaviour!