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44TH ASECAP STUDY & INFORMATION DAYS 2016

The Path Towards an Integrated And Sustainable Mobility in Europe

Intercontinental Hotel
23-25 May 2016

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Organized by



GEFYRA ...on the move

Surviving and Thriving in turbulent times

St. Stavris, P. Loukas

44th ASECAP Days, Madrid 23-25 May, Spain

Who is this?



This is our client



The Vision – Bridging the strait

- The idea of bridging the strait was first envisaged by the Greek Prime Minister Charilaos Trikoupis back in late 19th century
- Rion - Antirion ferry crossing time could exceed 45 min.
- Rion - Antirion Bridge links the west motorway network of Greece connecting significant cities and ports
- Bridge crossing time dropped to less than 5 min. regardless of weather conditions
- Social and economical impact especially on the surrounding regions



Turning the vision into reality

01.1996: Signing of the Concession Agreement

12.1997: Effective Date

07.2004: Construction Completion

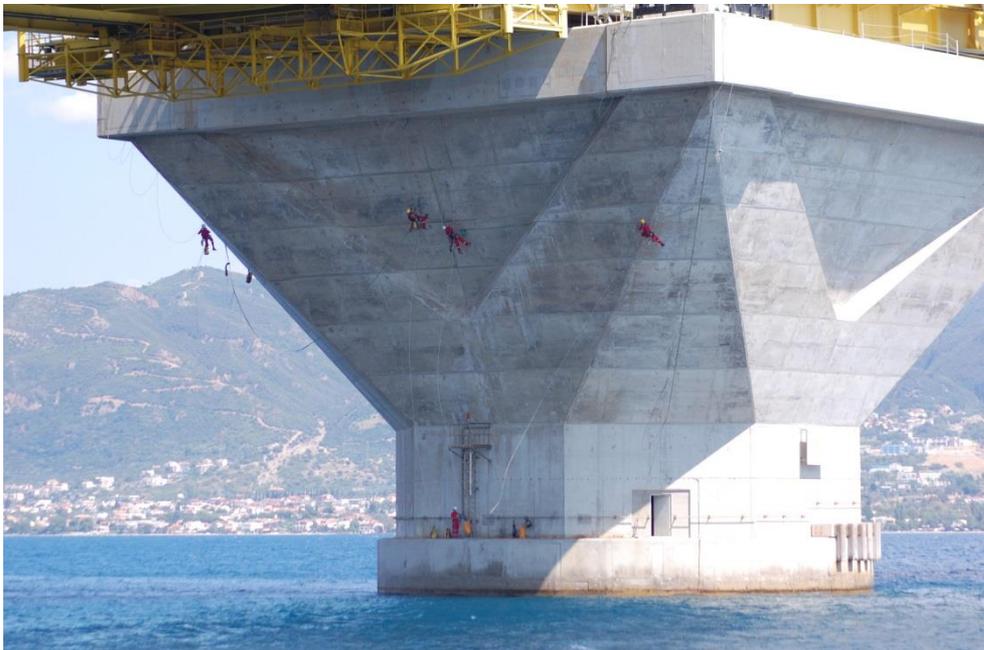
08.2004: Start of the Operation

Operation

12.2039: End of Concession



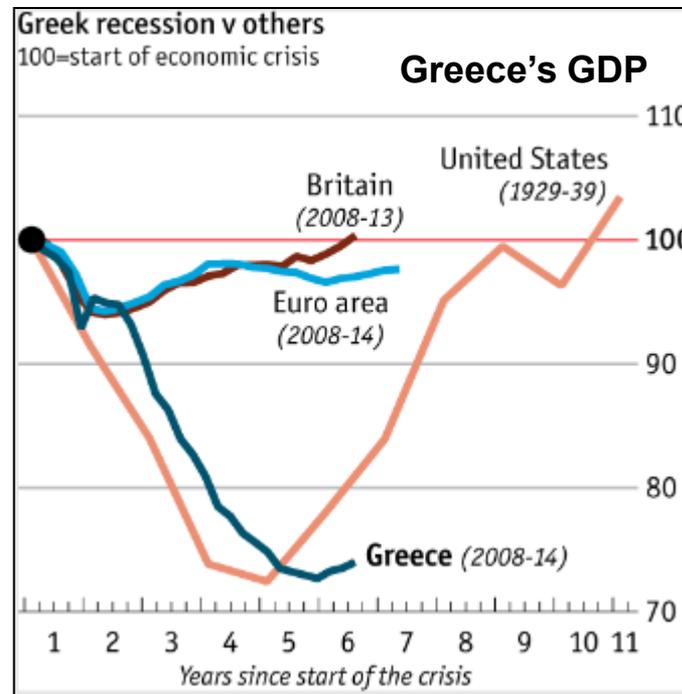
A constant technical challenge



The Bridge remains a constant technical challenge even beyond the construction era

The Advent of Crisis and its Characteristics

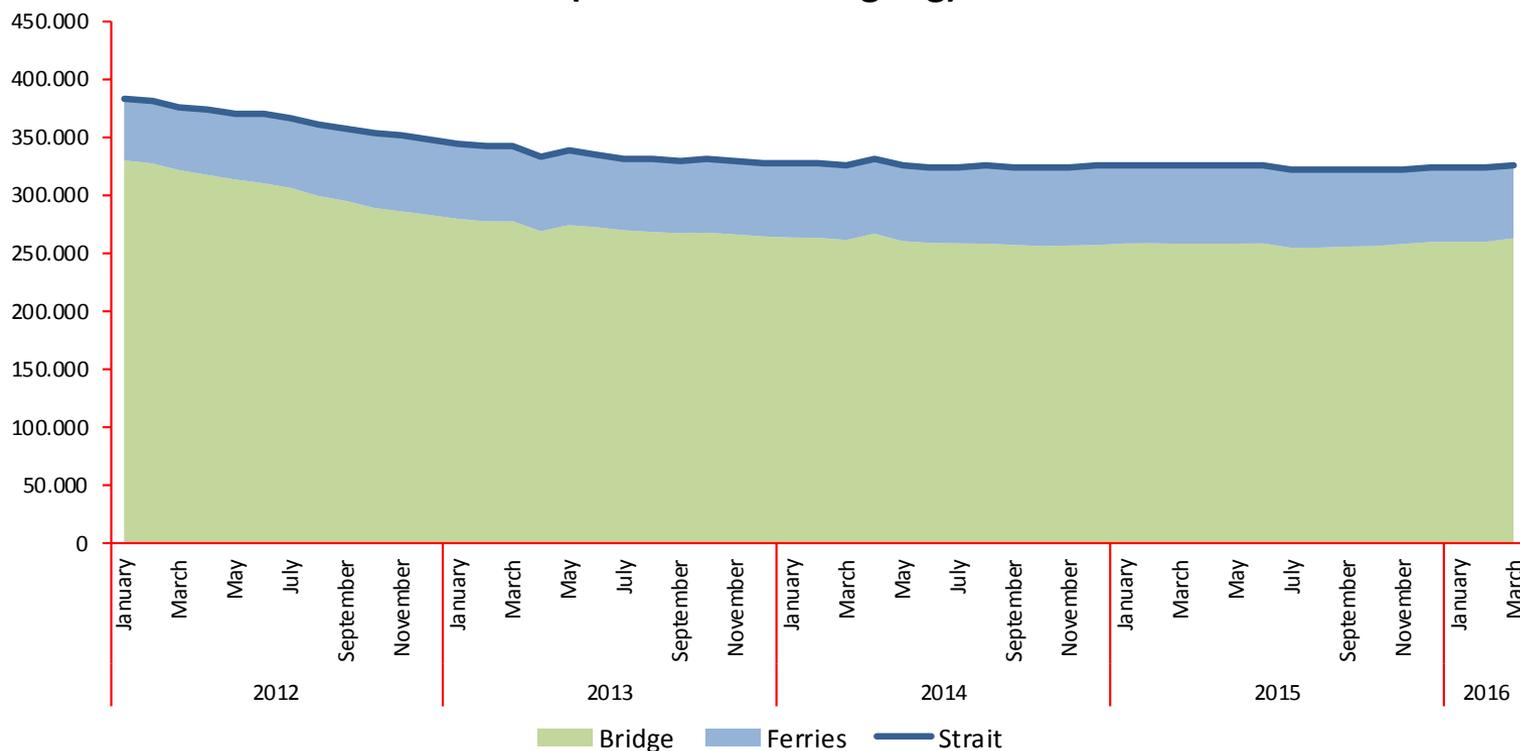
- Crisis period 2009 - to date ...
- The cumulative **loss of almost one GDP in 6 years**, GDP now down 25%
- Characteristics in relation to the Road Transport Industry
 - **Overall** road transport down **32%**
 - **Private** trips down **33%**
 - **Goods/Professional** trips down **18%**



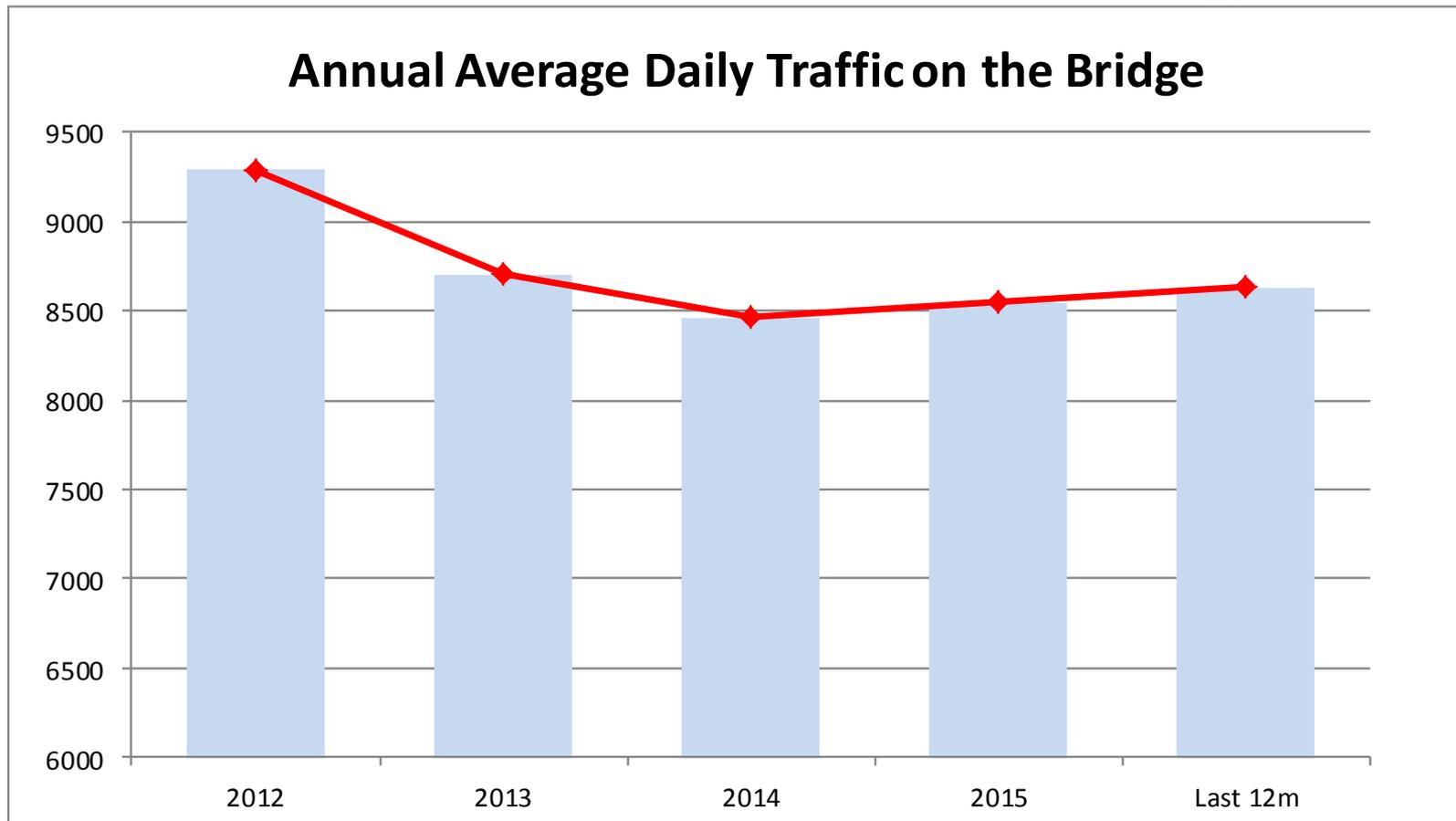


The crisis and the traffic evolution

Monthly Traffic in the Strait (12 month moving avg)



The crisis and the traffic evolution

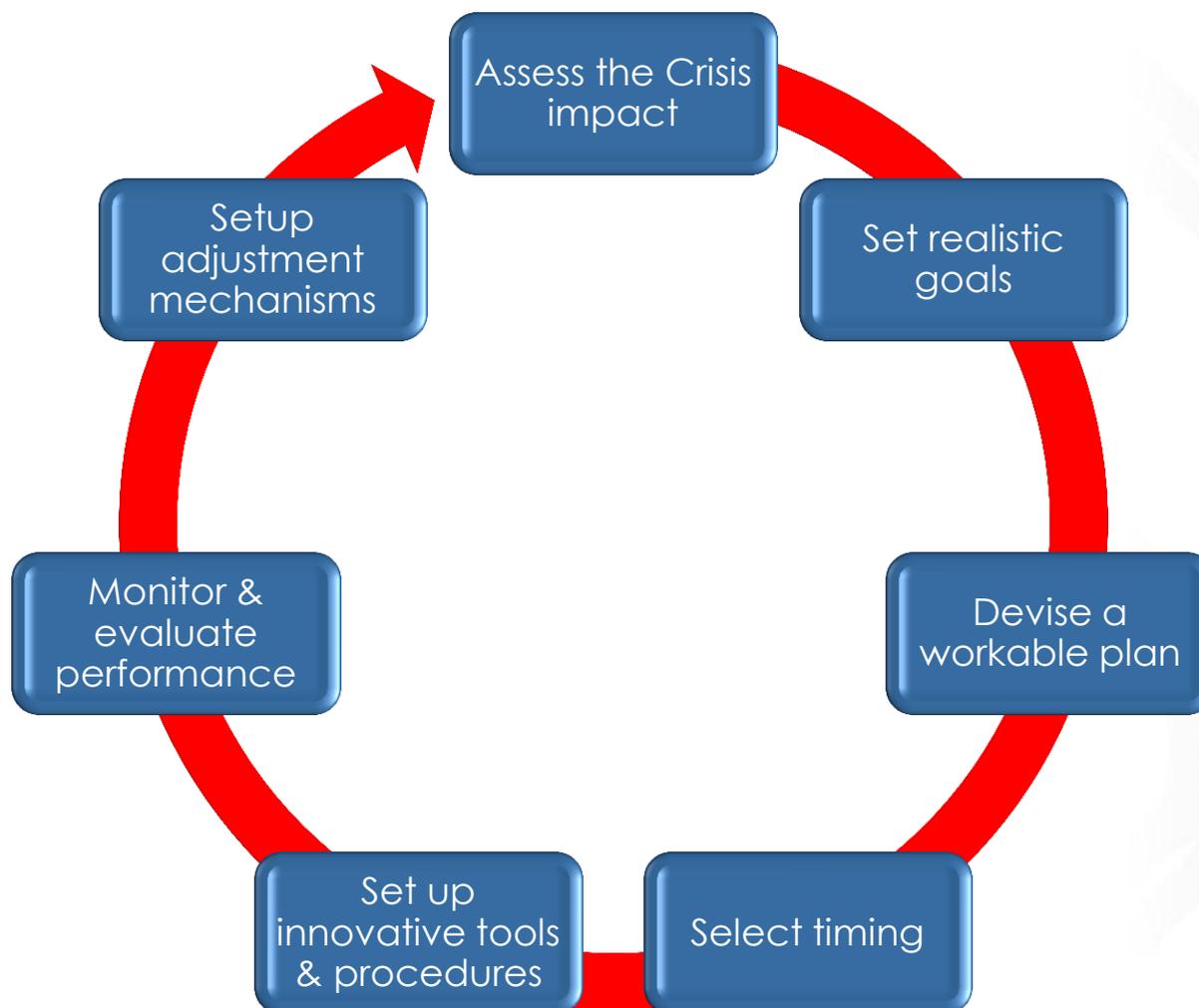


The management objectives



- Maintain the infrastructure to VINCI level of excellence
- Provide a customer centric service
- Be proactive and innovative
- Keep our customer loyal and satisfied
- Ensure financial stability & profitability

The Critical path



The overall Process

Crisis' Assessment

- Focused Quantitative Surveys
- Focused Qualitative & profiling Surveys
- 6.000 questionnaires during last 3 years

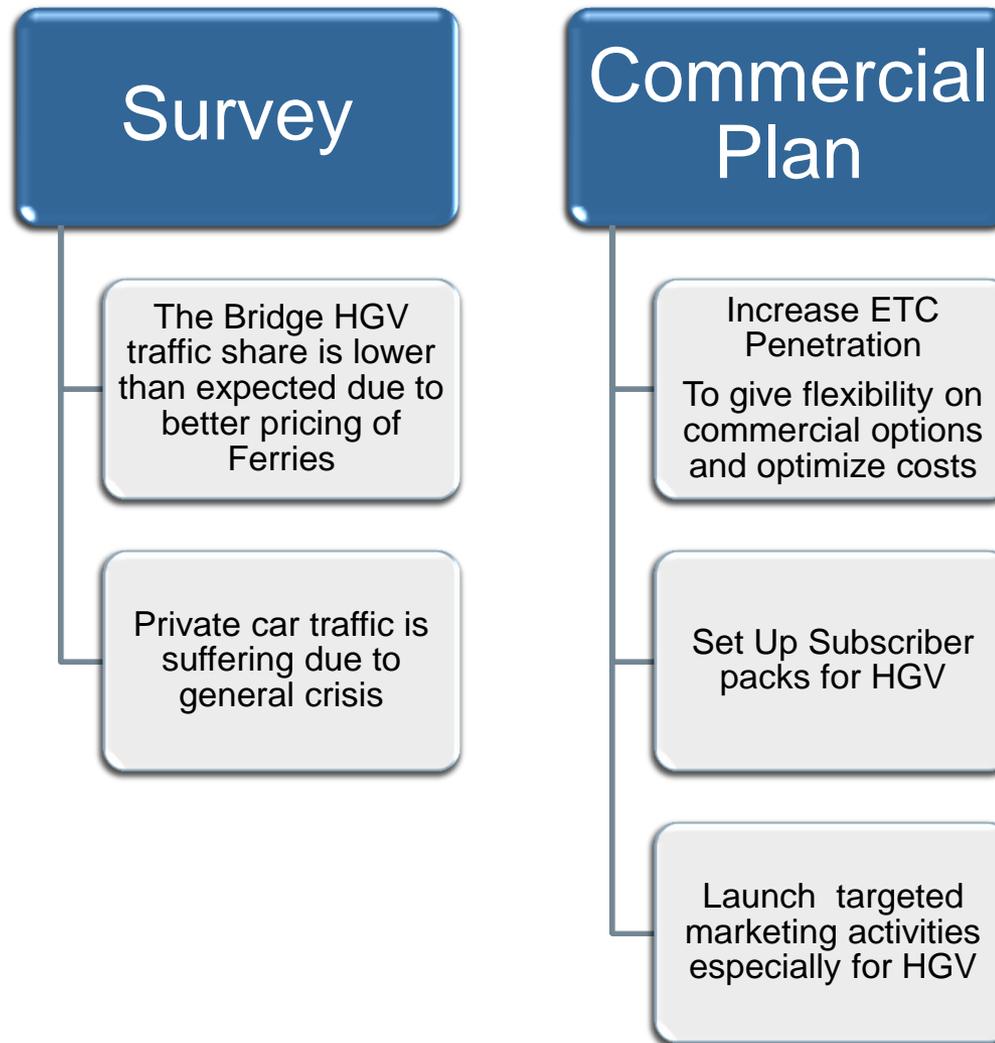
Set Goals

- Stabilize Traffic
 - Increase market share
- HOW???**
- Increase ETC penetration
 - Discount products for frequent users (aller-retour cards, etc)

Adjustment mechanism

- Evaluation Criteria
- Monthly evaluation
- Data Analytics Tool (i-ORS)
- KPI monitor (i-KPI)
- Performance Monitoring (KPIs)

The Assessment Results

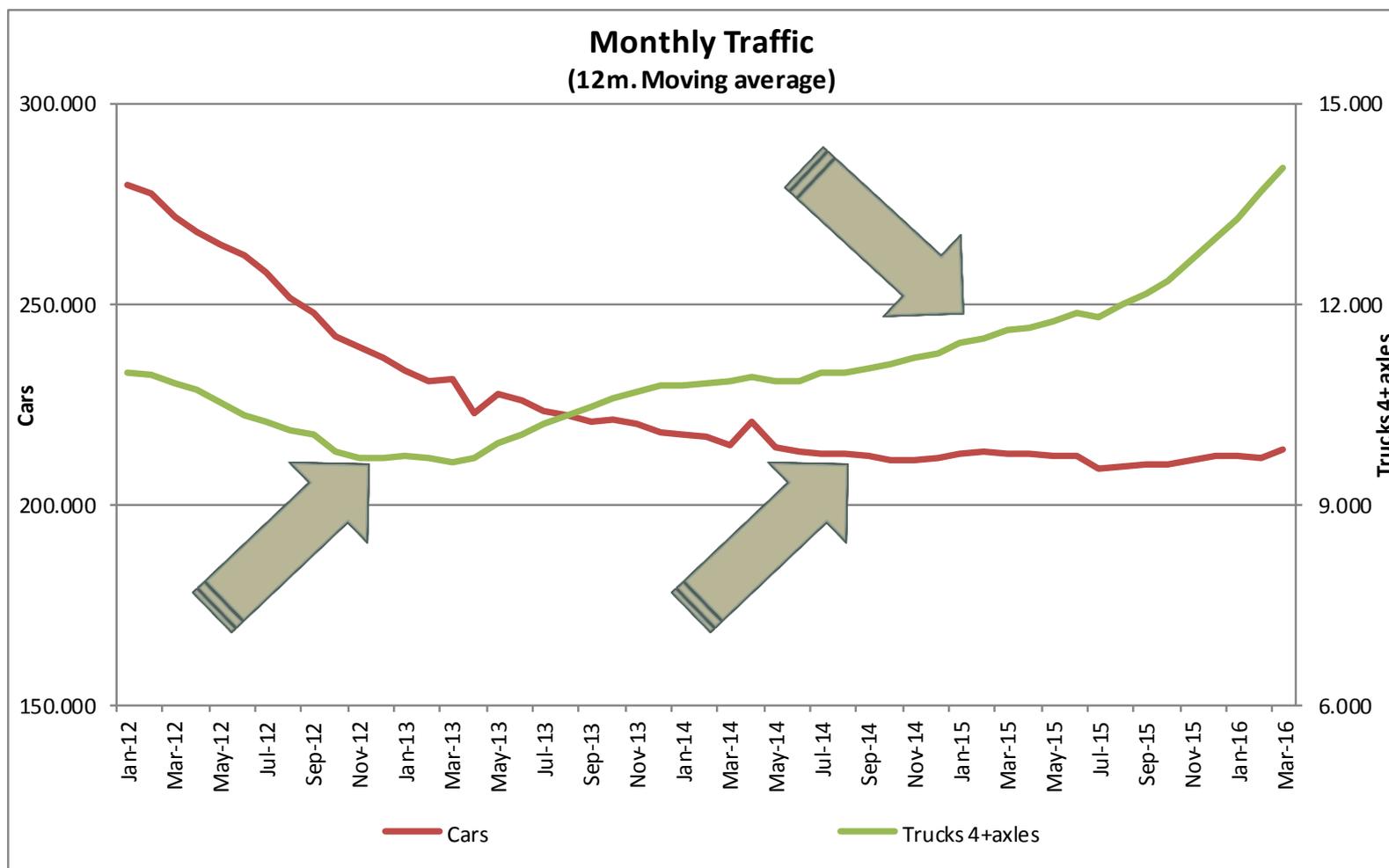


Action Plan

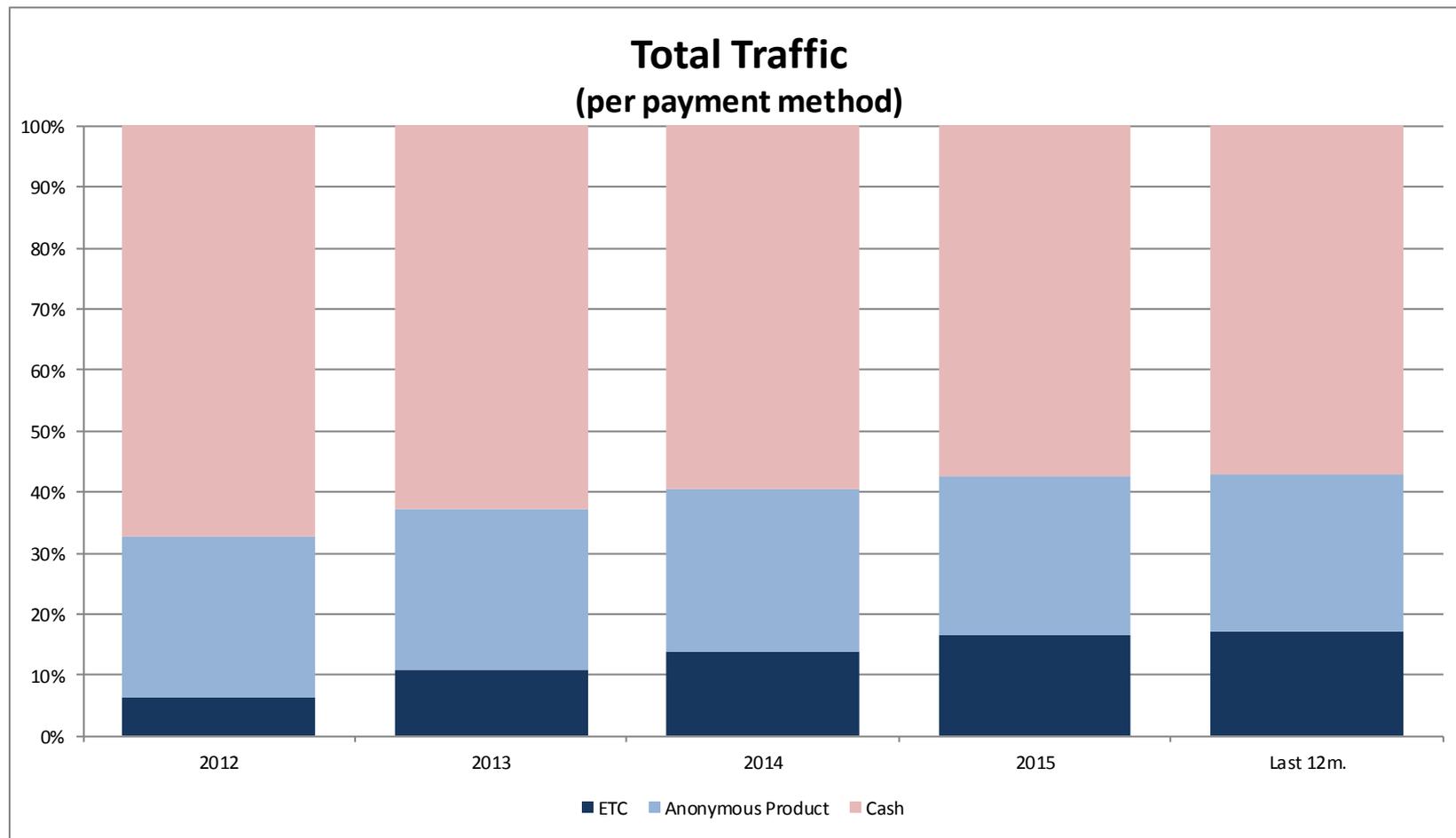
- On line web services to ETC users
- Production of a “user friendly” ETC Manual
- Production of new leaflets, promoting electronic means of payment and other commercial products
- Outdoor promotional / selling campaigns
- Targeted B2B campaign focused on big Customers
- Exploring and Developing new discount products (ETC, contactless smart cards, other)



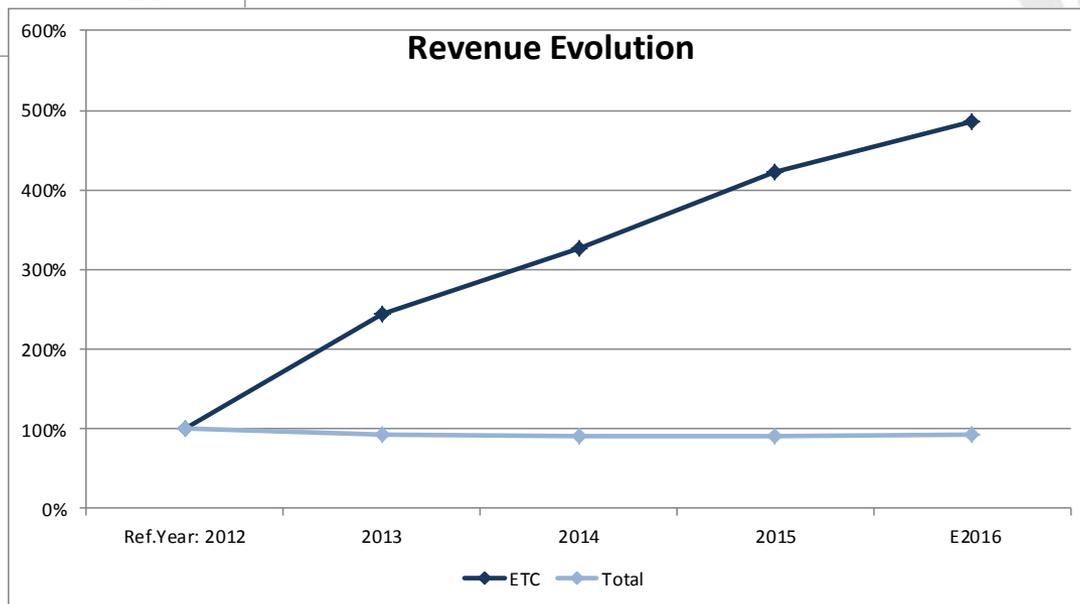
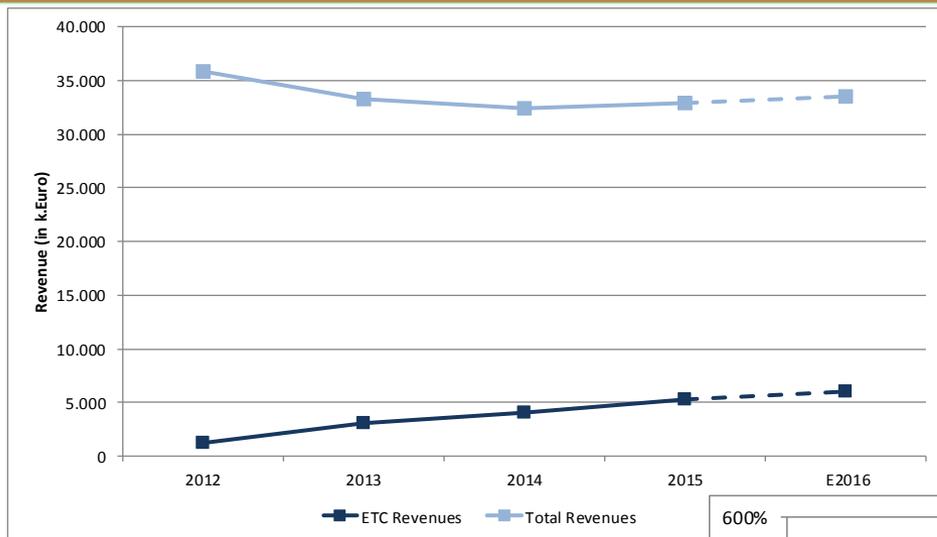
Results: The Traffic Picture 2012-2015



Results: The ETC Penetration 2012-2015



Results: The Financial Picture



Outcomes & Lessons

- **Key facts**
 - Car traffic stabilized, HGV traffic increase over 30%
 - ETC revenue increase over 3 fold
 - Overall cost effectiveness by 12%

- **Being proactive**
 - A minimum of 12 months incubation is needed
 - Part of the pro-activation is getting on board the right people !

- **Setting up Innovative tools and procedures**
 - Good decisions are based on reliable and timely data !
 - Set up an operational and purpose built tool to save time and money
 - We used InVision Motorway Business Analytics Suite

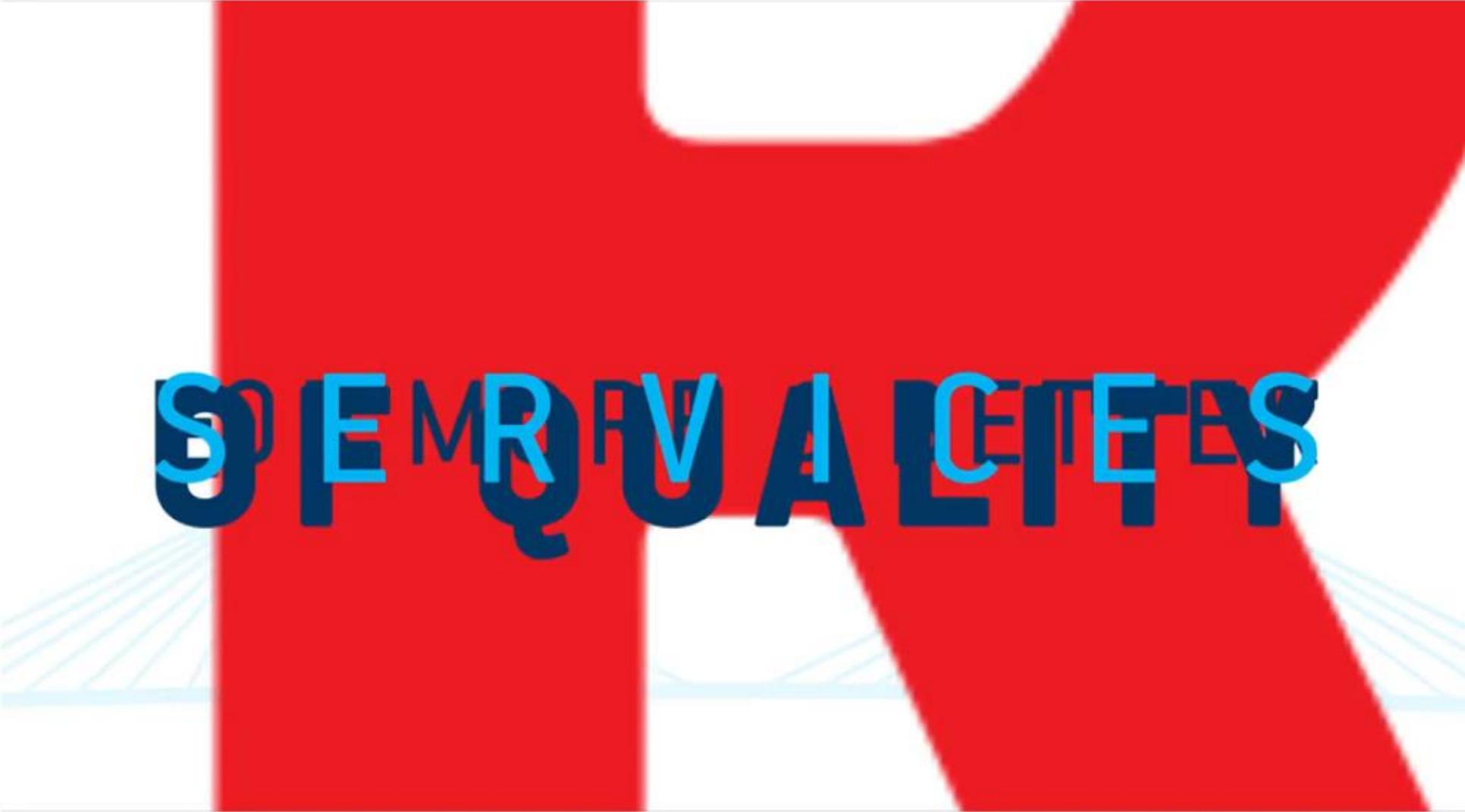
- **Monitoring**
 - Persistence together with flexibility

- **Contributing to the local societies**
 - Customized commercial packages assist the local economy
 - Financial stability of the operation protected the local jobs

- **Long term commitments matter**
 - Full commercial approach
 - Tools and People must be synchronized
 - During hard times, long term Engagements matters more



CLICK ON THE PICTURE TO WATCH
THE VIDEO



SEMPRE QUALITY

Meet-up the Challenges



- Exploring innovative payment methods
- Upgrading the Tolling System
- New outdoor promotional campaigns
- Bridge Sight seeing Days
- Reviewing of our “Critical Path” to respond to a constantly changing environment

Constantly on the move

*“THE WORLD IS MOVING FASTER.
MOVING WITH IT ALL THE TIME IS A KEY TO REAL VALUE”*

X. Huillard, Chairman and CEO, VINCI