

High performance. Delivered.

Connecting a Region Through Smartcard Technology

Achieving High Performance through Choice, Value and Flexibility

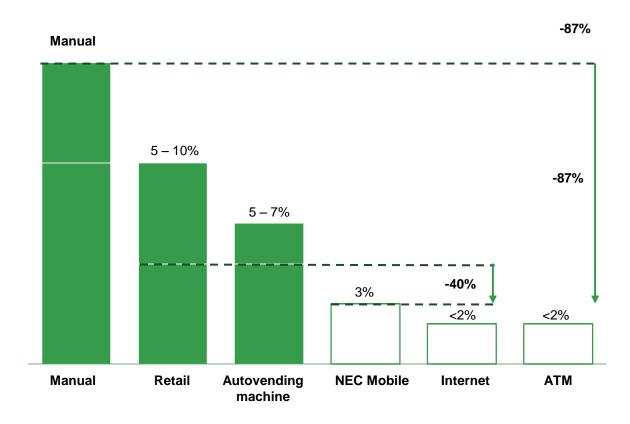


Our research shows that interest in e-ticketing remains very strong



- Provide significant distribution cost savings
- Boost customer satisfaction with operators
- Increase the efficiency of asset use
- Improve capabilities to combat fraud
- Provide more sophisticated business intelligence
- Provide an aura of innovation to public transport

Distribution costs in public transport by channel (Cost in % of Revenues)



Yet different priorities are being stressed and the marketplace is undergoing subtle changes

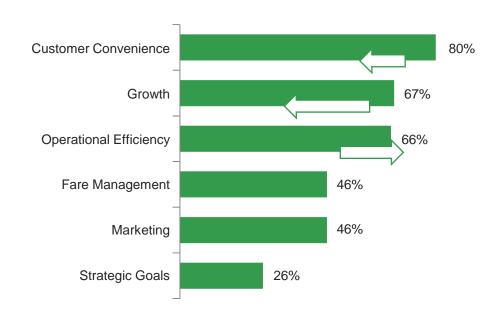


- Customer convenience is still strong but declining
- Operational efficiency is becoming as important as customer convenience

Others priorities have changed subtly

- Growth through e-ticketing adoption is no longer a priority
- Operational efficiency is acquiring specific meaning: internal process simplification
- Fare management is still important but the focus is on responsiveness within existing boundaries

Motivation factors underlying the introduction of e-ticketing



And Industry Trends and Customer Expectations are Driving More Payment Technology Choices

 Integrate payments across transport modes/operators (public/private)

Google

Access information

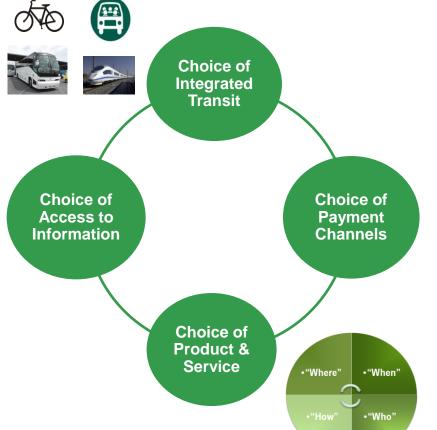
Anytime; anywhere;

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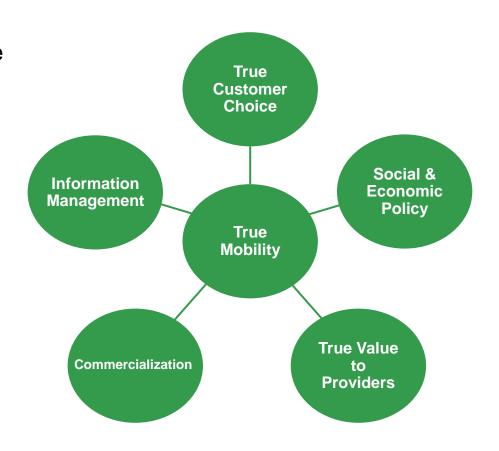


- Options on how to pay and use transit
- Credit card, debit card, mobile, transit only card

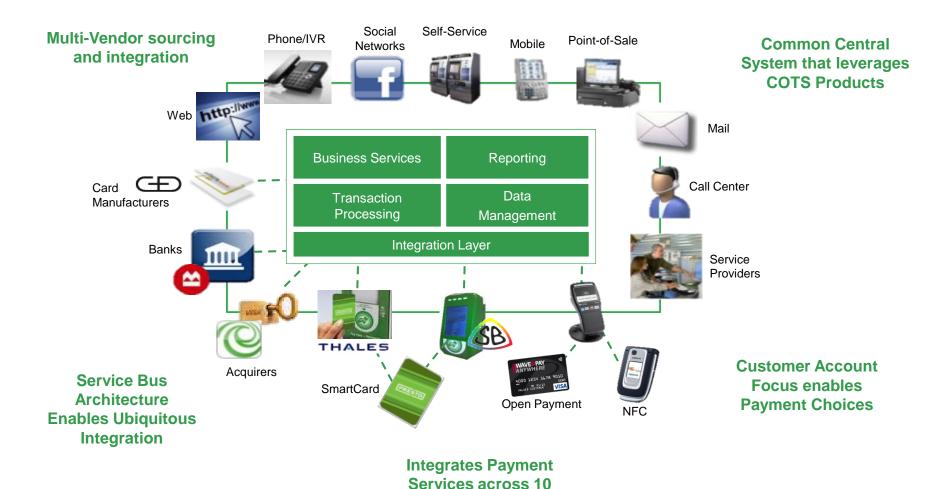
- Solutions that are low-cost and affordable
- Single or multi-ride, pass, stored value

Our Approach to New Payment Technologies Revolves around Choice, Value and Flexibility

- True mobility providing true choice
- Integrated service delivery
- Convenient customer experience
- Progressive technology
- Open and flexible system
- New opportunities for revenue generation
- Embedded information management capability
- Operating efficiency



Case Study PRESTO in Toronto and Ottawa



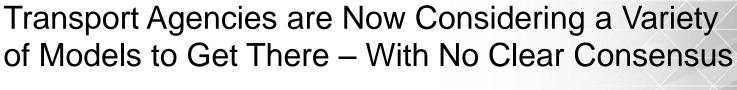
Transport Agencies

Case Study Mobile Ticketing





Transport Agencies are Now Considering a Variety





Integrator Led



Turn-Key

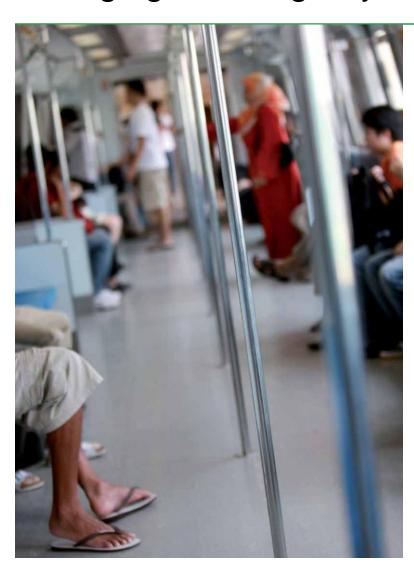


Concession?



Integrator Led

However, Some Common Elements Are Emerging as Being Key to Moving Forward



- Committed Executive Sponsorship
- Clear, Consistent Business Case
- Published Future Concept of Operations
- Internal Organizational Alignment
- A Burning Platform for Change
- Clearly Communicated Vendor Partner Strategy
- Confirmed Financing Strategy and Approach

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For More Information