



The Future of Individual Mobility in North-West Europe in 2020

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Understanding the New Global Business Environment

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The strategic dilemma

ProRail's service to its main customers has been subject to the scrutiny of politics, public and media over a prolonged period.

In order to fulfil one of its key role as infra provider to its customers, ProRail needs to decide how and where to allocate its scarce resources now and in the future.

Uncertainties around the development of future ridership and freight movement is keeping management preoccupied.



Doors Locked

- >Economy suffers from a long period of recession.
- >Oil price is high because of continuous growing demand
- >Increased feeling of insecurity because of social tension and terror attacks
- >Distance working becomes very popular
- >Investments in public transportation are very low
- >Individual mobility decreases



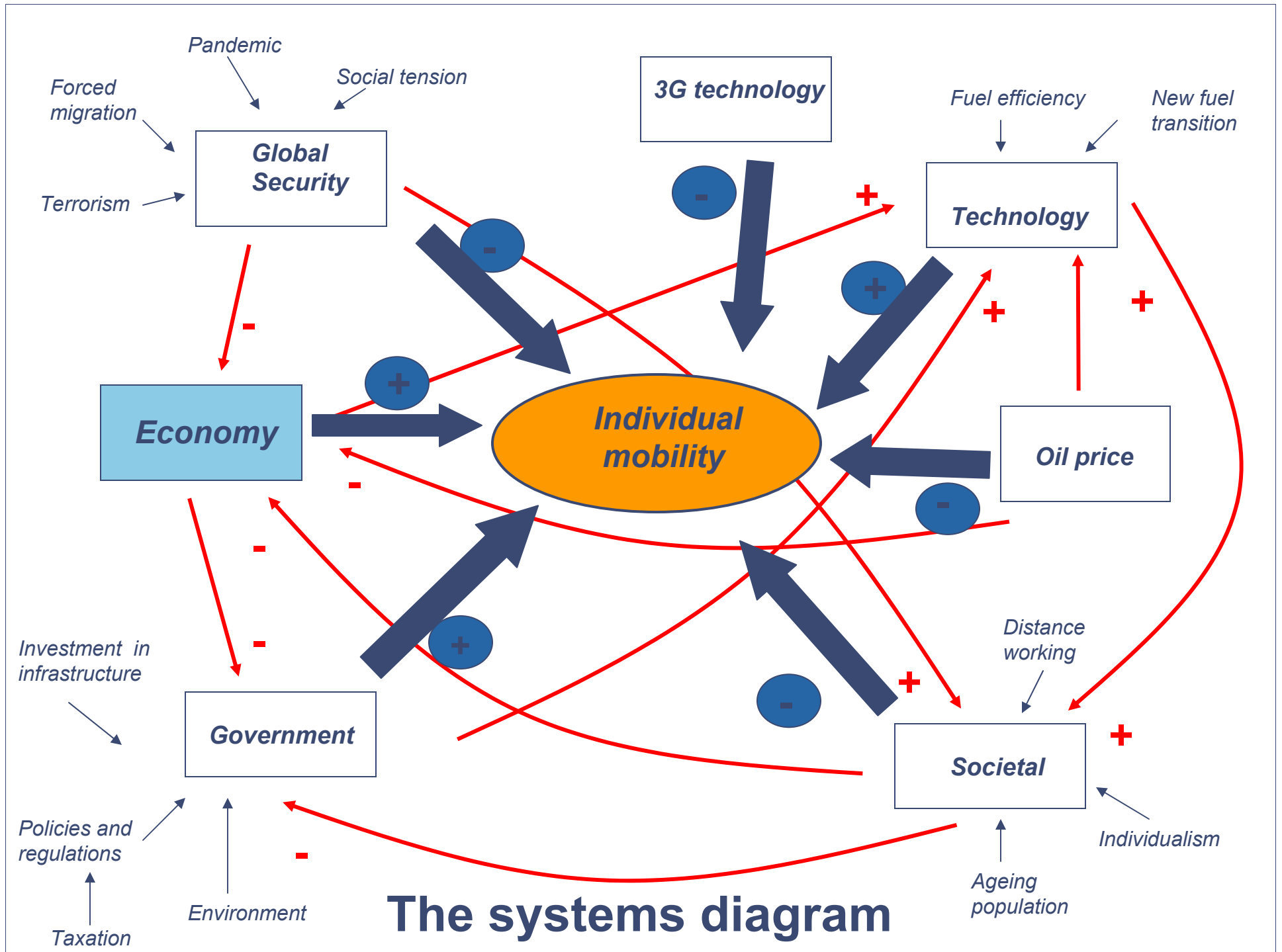
Middle East Pulls the Brake

- > **Serious clash between the Western and Muslim World**
- > **Oil price is extremely high and no real alternatives are available yet**
- > **Economy is most of the period stagnant. Government's spending on security is high and on infrastructure low**
- > **Distance working becomes very popular**
- > **There is a decreasing demand for travel**



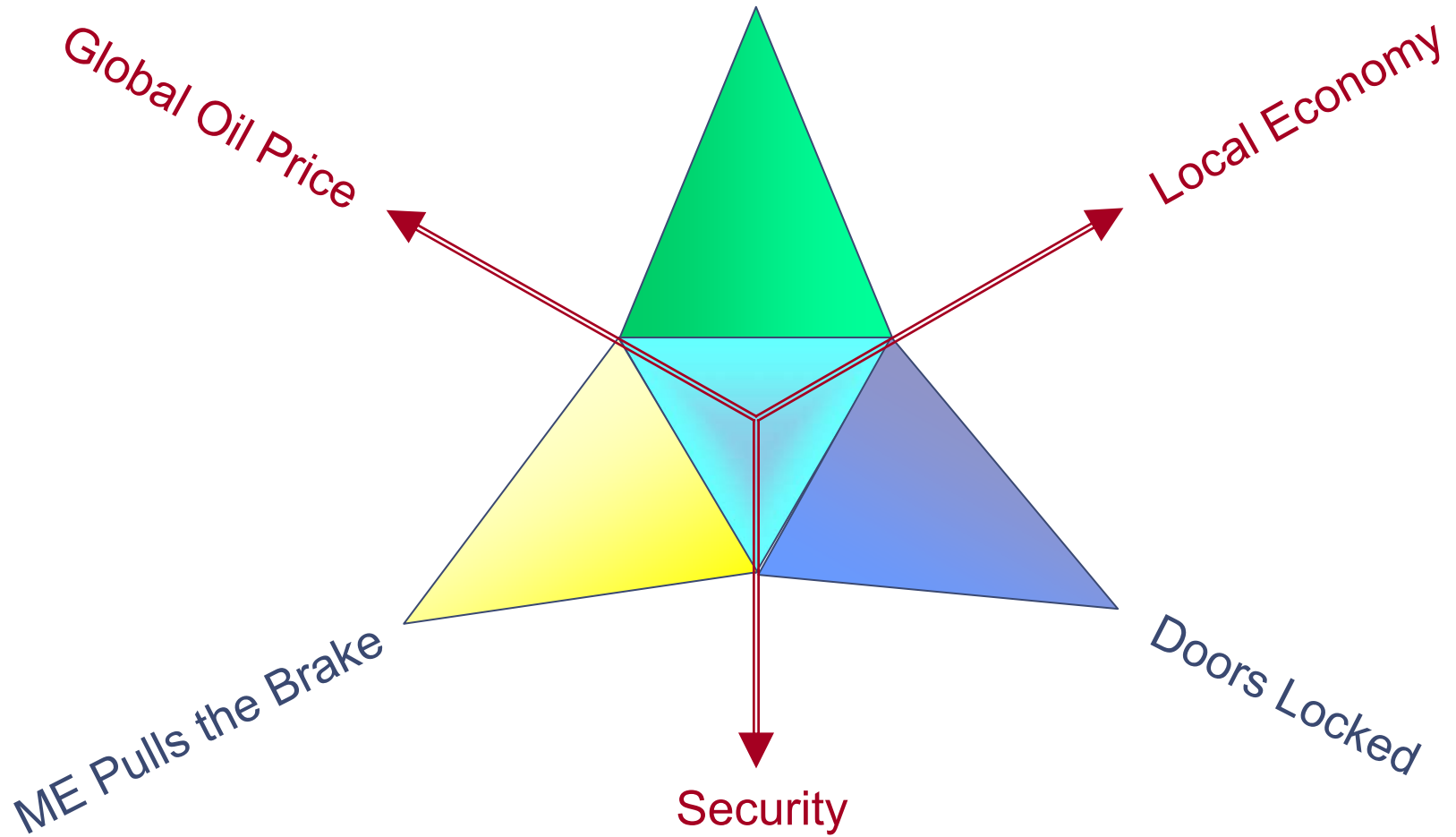
Highly Connected

- >Economy is mostly booming**
- >Hybrid cars and bio fuel have reduced demand for oil, oil price is reasonable**
- >Improved integration of minorities and terror attacks disappeared**
- >Increased individual mobility and increased investments in infrastructure**
- >Distance working is not very popular**





Highly Connected





	“Doors Locked”	“Middle East Pulls the Brake”	“Highly Connected”
Economy	Recession – Europe suffers from increase of average age and does not make successful transition	Recession – Europe suffers from the clash of Western & Muslim world and is unable to tackle the souring inflation	High growth, > 2% per year, Europe made successful transition to support increase of average age.
Oil Price	High – because of high global demand, though little local demand.	Drastically increasing – global demand neutral, but ME holds the sole supply	Neutral – transition to new fuel has lowered demand
Global Security	Globally relatively stable Local unstable due to divergence of income spread	Unstable world driven by geopolitical frictions	Stable, secure world
Individualism	Reversed- trend towards collectivism	Antagonist groups strengthen	Increasing
Government	Concentrates on getting economy back on track, spends available money on pensions and healthcare, no in infrastructure	Budget deficit up Heavy investment in military Struggles to stimulate economy	Investments in infrastructure (light rail, high-speed trains, new roads)
Distance Working	No	Yes – out of necessity	No – everybody commutes to work
Transition to New Fuel	Slow and painful	Slow but the governments recognise this is a vital quest for survival	Quick and smooth



‘Closing the loop’

- The abundance of bandwidth on the current glass fiber network needs to be further exploited by digital services.**
- The current capabilities and competencies need to be directed and developed towards collaborative technology networking.**
- Information systems should be developed to a level that can suit the individual 24/7 with real time and up-to-date information.**
- Personnel, passenger and freight security systems are to be developed.**

FROM INFRAPROVIDER TO MOBILITY ENFORCER!!