Long Distance Coach Services in France and Germany: the new European competition between Flixbus and BlaBlaBus

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Long distance passenger mobility is experiencing a huge structural change in France and Germany. Based on Internet technology and customer-oriented services, new entrants in interurban coach services are diversifying the options for the travelers and have been very successful. This market has been deregulated in 2013 in Germany and 2015 in France. New actors are not only challenging rail operators in France and Germany, but also BlaBlaCar, the world leader in ridesharing and sometimes low cost airlines.
Long distance coach players have also experienced in 2019 a concentration of actors: Flixbus, the leader with a market share in Germany of 95% has bought the French outsider Eurolines/Isilines. Eurolines/Isilines (Transdev Group) was the dominant operator before deregulation but had not succeeded to become a leader. Ouibus, which is a subsidiary of SNCF-the challenger of Flixbus in France, experienced high losses in operating, which was backed by public fund and debt, was sold to BlaBlaCar. Ouibus changed its name in BlaBlaBus - and is now becoming the French challenger in coach and ride-sharing operation.
Flixbus and BlaBlaBus are now moving on the European market: the aim of our paper is to analyze the development strategies of these coach services leaders in France and Germany in a European perspective. What will be the balance? Which new services will emerge?

Parole Chiave: Long Distance Coach, Competition, France, Germany, Europe, Flixbus, Blablabus

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1 The intercity bus market in France

The French mobility market is highly dynamic: between 2012 and 2017, the population has grown with an annual rhythm of 0,4% but mobility of passenger transport has increased by 1,2% (Guihery,Tedeschi, 2019). The following table is showing the French transport passenger market: individual mobility is representing 80 % of the passenger market. From the long-distance public passenger market, coach is representing 2,7 billion passenger.km, increasing rapidly (+19,2 % in 2018 compared to 2017), it means 9 million passengers in 2018. Railway mode is still leading with 53 % of all public transport.

Table 1 National passenger transport in France – 2018 and trend since 2013

	2018 (en billion pass.km)	**In %**	**Trend 2018/2013**
Individual mobility	**757,1**	**80 %**	+1,2
Long distance public transport	**123,9**	**100 %**	
Road : coaches (1)	43,9	**35 %**	0,2
From this interurban coaches	**2,7**	**2,2%**	
From this occasional in foreign coaches	6,6	**5,3%**	-1,3
Rail : HST	58,6	**47 %**	1,3
Rail : Interurban train (no HSR)	5,5	**4,5%**	**-7,5 %** **challenged by coaches today**
Air transport (2)	15,9	**13%**	1,9
Public transport – short distance	**58,4**	**100%**	

Road : buses and tramways	14,6	**25 %**	3,1
Ile-de-France	6	**10%**	3,6
outside Ile-de-France	8,5	**15%**	2,8
Rail : regional trains	13,8	**24%**	-0,1
Rail : regional trains in Ile-de-France	19,2	**33%**	1,1
Tubes	10,8	**19%**	1,4
Ile–de–France	8,1		1,3
Outside Ile–de-France	2,7		1,6

Source: Les comptes transport de la nation 2018, August 2019, p. 139
Notes: (1): occasional transport, regular (SNCF Coaches), school and staff coaches; (2): national metropolitan flights only.

Concerning the coaches, the national agency in charge of regulation, ARAFER, is collecting all the data on the national market (ARAFER, 2019). Firms can offer intercity bus services nearly as they want, with the exception when these services are challenging local and regional public transport within a distance of 50 km (Germany) and 100 km (France) from the main city. The main leaders on the market – FlixBus and now BlaBlaBus – own no coaches and are subcontracting with coach companies that fulfill the requirements regarding safety, performance and professional competence. As in Germany, the French intercity coach market was a niche market before deregulation and, at the same time, the state-owned intercity railway company (SNCF). Similarly, DB in Germany had a monopoly in rail passenger transport. Today, the situation has entirely changed and rail incumbents are facing both intermodal competition (ride-sharing, long distance coach, low costs airlines) and intramodal competition (Flixtrain in Germany starting on the rail market and Thello but primarily Trenitalia entering France in June 2020).

Since the beginning of operation (August 2015 in France and 2013 in Germany), 23 million passengers have travelled with coaches in France (2,3 million in the first quarter of 2019), which means an increase by 26 % in comparison with the first quarter of 2018 and 4% increase since the last quarter of 2018. Similar to Germany, the market is slowly reaching a threshold and is season oriented (for instance, 234 cities are connected in the first quarter 2019, it means 11 % less than the last quarter of 2018). The load factor is 59,8% and is continuously increasing for two years. Due to this result, the profitability is increasing slowly after the losses incurred by the operators in the years before. The income by coach.km is increasing by 7 % in 2018 and is reaching 0,97 €. The revenue per pass.km remains low:

approximately 3,7€ for 100 pass.km. As we will see later, competitive pressure is very strong on this market. The average travel distance is 284 km in the first quarter of 2019.

Eight operators are referenced in the first quarter of 2019, but in mid-2019, the situation is becoming very clear with two main actors: Ouibus is integrated (1st July 2019) with the leader of ride-sharing BlaBlaCar. Ouibus changed its name to BlaBlaBus, the new European actor. Eurolines / Isilines joins Flixbus in May 2019, which is becoming the European leader ahead of its challengers. Flixbus in France is reinforcing his service. At present, Flixbus reaches 78 % of the cities in France and 70 % of the relations, a record since 2015. What will be the reaction of the new actor BlaBlaBus?

One of the main topics of discussions in France is the impact of competition on public services of regional railway transport (TER) and regional coach transport that are financed and managed by the Regions. The new liberalization law of coach transport has implemented a safeguard for regional public transport. The ARAFER is strictly controlling this issue: at this time (2017), only 4% of new coach services are in competition with subsidized public regional rail services. Less than 100 lines were taken to arbitrage Court of ARAFER by the Regions that considered these new services as an unfair competition to public service. 85% of the lines analyzed were considered as fair and could be opened.

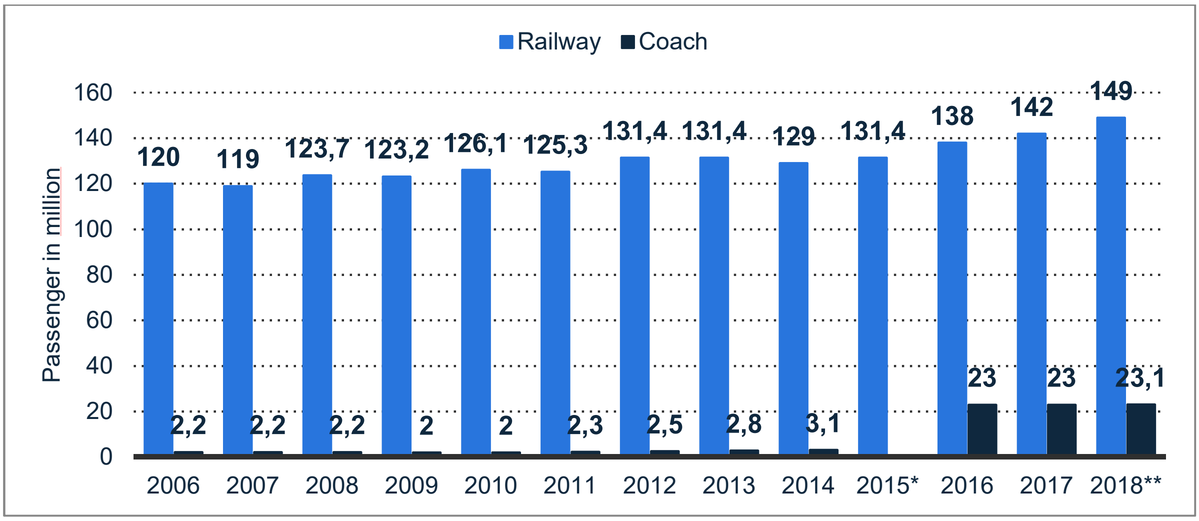
The success of ride-sharing services and coach operations in France, like in Germany, is celebrating the comeback of road in the modal split after years and years of state support to the rail company. Even if the two challengers could be slower in travel time than rail, they answer to the expectations of passengers: door to door services, cheaper than rail prices, high quality of service (WIFI). Some researches in France show that 17 % of the traffic are induced traffic, it leans new motility because of these new cheap services.

2 The intercity coach market in Germany

The German intercity bus market was deregulated in January 2013 and is totally changing the shape of the long-distance market in Germany because the DB is not the only allowed operator in long distance passenger market: intermodal competition is becoming stronger (coach – rail – air) but also since mid-2018 with newcomer Flixtrain (open access) on the German rail network. Coach companies are allowed to offer intercity bus services, if the company fulfils the subjective requirements regarding safety, performance and professional competence and if the company is registered in Germany (*Personenbeförderungsgesetz* (PBefG), 2013, §13(1), Gremm, Guihery, 2017). As expressed before, subsidized regional railway and public transport system are protected in a radius around the coach station where the service is started (50 km or a minimum regional railway travel time of 60 minutes (*Personenbeförderungsgesetz* (PBefG), 2013, §42a, Gremm, Guihery, 2017).

The German coach market is a very dynamic market with 23,1 million passengers carried in 2018 (Figure 1), stable since 2016 (8,2 million in 2013, 16 million in 2015). It means 6,7 billion passenger.km in 2018. In comparison, 149 million passengers are using the railway in 2018, increasing since 2015 (138 million in 2016, 142 in 2017 and 149 in 2018). Then the market share of coach transport is slowly declining since 2015 (15%) to 14,3 % in 2016, 2017 and 13,4 % in 2018. Berlin (1672 departures every week in 2017), Frankfurt (1007), Hamburg (884), Cologne (853) and Munich (803) are the five main connected cities. 2945 companies are registered for long distance services but only 65 offer a regular coach service (2016). But Flixbus (Flixmobility GmbH - Figure 2) is reaching 95 % of the market shares. 50 % of the passengers are below 34 years old. Aim of trip is 40 % private purposes, 23 % for holidays and 23 % for tourism. Cheap tickets and comfort in coach, Wi-Fi available, are largely approved by the users.

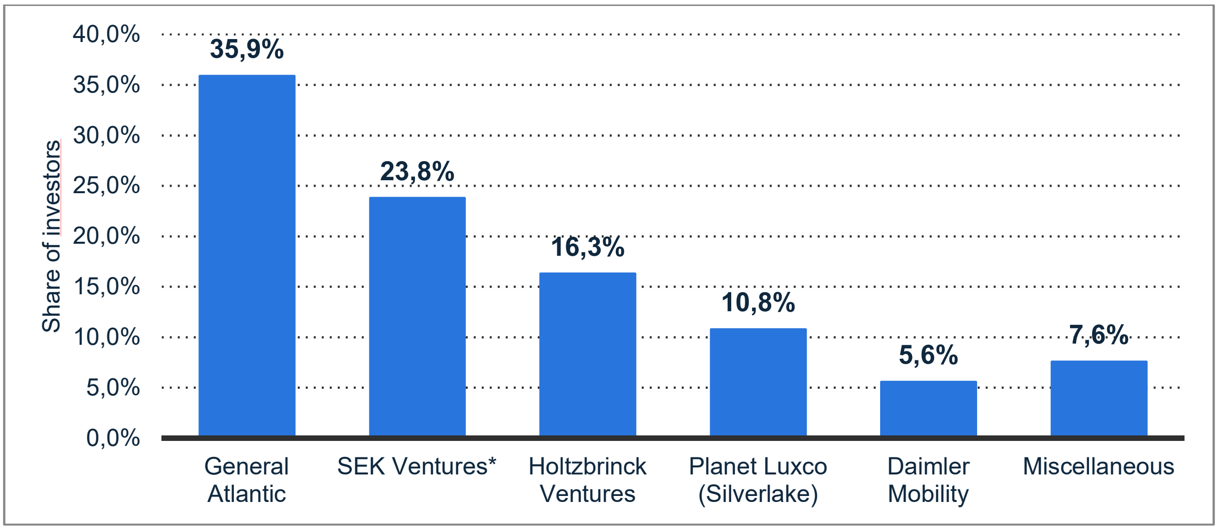
Figure 1 Number of rail and coach passengers in Germany



Source: Statista, 2019

In 2017 in Europe, 40 million passengers (30 million in 2016) have travelled with Flixbus (Süddeutsche Zeitung, 6.03.3018). Load factor is around 60% (Stuttgarter Zeitung, 20.12.2017): increasing the load factor is one of the key factors of the strategy of Flixbus to reach profitability1 on this market in Germany but also in France.

Figure 2 Structure of Capital of Flixbus



Source: Statista, 2019

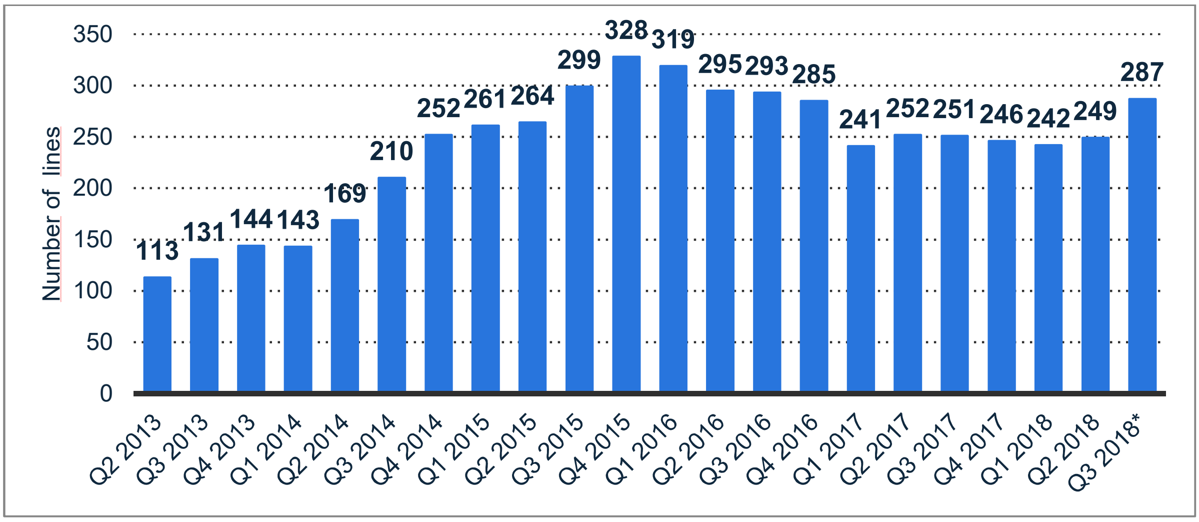
After deregulation, many bus companies such as Postbus, FlixBus, MeinFernbus or Megabus have entered the German interurban bus market. Since January 2015, the number of independent players has been reduced significantly due to a process of consolidation (Gremm, Guihery, 2017). The two biggest bus companies, FlixBus and MeinFernbus,

[1] Break-even point of Flixbus Germany is around 67 % load factor (http://www.manager-magazin.de/magazin/artikel/fernbusmarkt-flixbus-der-monopolist-a-1142889-2.html)

announced a merger in January, 2015. In 2016, FlixBus bought the German intercity bus company of Megabus and Postbus.

Since deregulation in 2013, the number of intercity bus lines increased from 62 lines in the first quarter of 2013 to 328 lines in the fourth quarter of 2015 (Gremm, Guihery, 2017) and 287 lines in the third quarter 2018. In the course of consolidation, the number of lines has then been reduced (see Figure 3).

Figure 3 Number of intercity bus lines in Germany



Source: Statista, 2019

This summer 2019, the DeinBus.de has announced insolvency (50 drivers for 56 employees) and is trying to keep his activities alive. Many reasons explain this situation: insolvency from a partner first but the key factor is the competitive pressure from Flixbus, leader of the market. This new insolvency is putting a new name on a long list of the companies which have abandoned the German market: Megabus, The Post, German post and the ADAC. It would be interesting to see if Blablabus would succeed in challenging Flixbus.

3 Competition BlaBlaBus - Flixbus: which balance on the European market?

Long distance coach players in France and Germany has experienced in 2019 a concentration of actors: Flixbus, the leader with a market share in Germany of 95 %, has bought the French outsider Eurolines/Isilines. Eurolines/Isilines (Transdev Group), who was the dominant operator in Europe before deregulation. Ouibus, subsidiary of SNCF-challenger of Flixbus in France, was sold to BlaBlaCar, which changed its name in BlaBlaBus and is now becoming the French leader in coach and ride-sharing operation and is moving rapidly on the European market.

3.1 On Flixbus Strategy

Concerning Flixbus, it is difficult to get some information: The Federal Administration of Germany is officially expressing this fact in its 2017 report[2] (BAG, report on long distance coach, 2017, p. 36[2]). In Table 2 , we sum up some official data from official financial statement monitoring (Bundesanzeiger). In particular, it appears that Flixbus is losing money in France and Italy in 2015 and 2016, but not any more in 2017 in Italy. We have to be very careful with these results because some financial arrangement could occur, for instance putting costs to the local companies and more revenues to the mother company in Germany (see Table 2).

Table 2 Financial and staff data on Flixbus in Europe

	2015		2016		2017	
	Employees	Profit / Losses x 1 000	Employees	Profit / Losses x 1 000	Employees	Profit / Losses x 1 000
France	16	-2 355 €	36	-9 438 €	?	?
Italy	15	-2 447 €	31	-4 854 € (1)	?	+ 1 432 € (1)
TURNOVER: Germany and TOTAL (Europe)	562	Turnover foreign: 25 546 Turn. Germany . : 179 972 Total : 215 286	748	Turnover foreign: 131 000 Turnover Germany . : 197 796 Total : 352 000	With now a quasi-monopoly in Germany, the company is expecting positive financial results for 2017 and 2018.	Turnover 2017 : 400 000 (Press)

Source: https://www.bundesanzeiger.de/ebanzwww/wexsservlet; own calculations; (1) : Italy : Turnover Flixbus Italy in 2016 : 29 million € ; 2017 : 67,1 million € (source : consodata.it and A. Bergantino).

Flixbus in Europe is now operating 200 000 relations, 1400 destinations in 26 countries. At this time, the financial legal information available are the following:

2016: negative cash flow of business: -3.496.000 € (in 2015: -24.650.000 €).
2016: negative results *(“Konzernjahresfehlbetrag”)*: - 53.989.000 (2015: - 31.475.000)

In terms of competition, the strategy of FlixBus is to target many destinations in a diversified supply: in France, 56 cities are connected solely with FlixBus and 2/3 of all destinations are

[2] No data available : „Für die FlixMobility GmbH (Flixbus), die Berlin Linien Bus GmbH sowie die Deutsche Post Mobility GmbH (Postbus) liegen derzeit auf Jahresabschlussbasis keine Daten zur Ertragslage vor” (BAG Report in Long Distance Coach, 2017, p. 36).

reached by FlixBus (141 cities meaning 69 % of all destinations). BlaBlaCar – Ouibus before - seems to be more focused on the main lines with offering the mostly daily departures.

In Germany, one of the success of Flixbus is to offer a network accessibility based on long distance passenger coach to middle size cities, which have been put aside from DB networks. Some relation (Dresden – Berlin[3]) are very competitive in term of transport time and can be faster than by train on certain period of time.

One of the main strategies of Flixbus is to offer **a door to door strategy**: the company has signed an agreement with UBER in Germany in march 2019 (4 cities in Germany) and in France for 10 French cities: Paris, Marseille, Lyon, Lille, Toulouse, Nice, Nantes, Montpellier, Strasbourg, Bordeaux, Rennes, Aix-en-Provence with some advantages:

- Flixbus is offering to UBER customers a voucher of 10% off for a travel with Flixbus all over his European network (2 000 destinations, 27 countries)[4].
- UBER gives 10€ voucher for Flixbus passengers using for the first time UBER.

With UBER, Flixbus is starting maybe an **interlining strategy**. The next step could be a code-sharing integration of both data systems.

The company is expanding rapidly at international level: Flixbus started in USA to compete with Greyhound in June 2019. At the end of August 2019, Flixbus has announced launching services in Turkey after owning Kamil Koc. Company, one of the leading companies in Turkey connecting 61 cities and carrying 20 million passengers in 2018. The Kamil Koc. Network will be integrated in the Flixbus network (Der Spiegel, 2019).

As a reaction to the BlaBlaBus operation in Europe, Flixbus has announced in the mid of 2019 the launch of his own ride-sharing services. In a short term's perspective, the European market will be shared among two large and innovative operators, which should be positive for the customers and the services proposed.

3.2 On BlaBlaBus strategy

Blablabus is now operating in Germany since July 2019 under the supervision of Comutu, the subsidiary of BlaBlaCar in Germany. The BlaBlaBus coaches use the orange color that highly differentiate them from Flixbus operating in green. The strategy of BlaBlabus is to start operation with very low prices, starting from 99 Cent (FAZ, 28.08.2019). The Journalist from FAZ is talking from "*Kampfpreisen"* (combat's price) or "*Kennenlernpreise*" (discovery's prices) in the wording of BlaBlaBus, which comes back to the strategy observed by the famous German Economist Walter Eucken in her 1914 PhD (Eucken, 1914). He observed that during the expansion of maritime transport at the beginning of the century, large and known shippers organized "*Kampfschiffe" (combat vessels)* with very low shipping price to remove services from newcomer on this dynamic maritime freight market (Guihery, 2013). After two months of operation, BlaBlaBlus is responsible for 70 % of load factor in Germany, the key market of Flixbus. BlaBlaBus is reaching 30 destinations in Germany, mainly the largest cities. BlaBlaBus is planning to have 40 destinations at the end of 2019. All over Europe, BlaBlaBus is reaching 400 stops in comparison with Flixbus that offers 2000 destinations with a 95% market share in Germany.

The business model of BlaBlabus is same as that of Flixbus: contracting with private coach operators that manage both drivers and coach operation and provide high quality of service (WIFI, USB Plug-in, Toilet, Air conditioning).

The strategy of BlaBlaBus is quite different from Flixbus: the French company does not want to enter the Railway market in comparison with Flixbus which has launched Flixtrain services. The intermodal expansion of Flixbus is a challenge because a possible lack of quality of service in the new segment of market could have an impact on the "milk cow", it means the coach market for Flixbus. BlaBlaBus wants first to operate on the main relations

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[3] One of the most successful lines: 60 relations every day in 2016 (https://www.wiwo.de/unternehmen/dienstleister/flixbus-wachstum-vor-profit/14680498-3.html).

[4] https://go.flixbus.fr/uber-partenariat/

between the main cities of the European Union, which allows rapidly to have revenues for further operations. Previous challengers that have retreated from the German market have focused on a larger scale with medium cities, which has led to low profitability and then losses. BlaBlaBus will try to increase the loading factor by selling the lowest prices on the market.

The aim of the business strategy of BlaBlaBus is trying to connect its core business of ride-sharing BlablaCar with an extension to the coach market. The idea is a ride-sharing drive with BlablaCar to the largest city then take a coach to the next destination and then maybe continuing to the final destination with BlaBlaCar. One of the problems is to connect the two platforms: the coach platform where time table are centralized and know ex ante and BlaBlaCar where contact between drivers and passengers are fully decentralized and are going on every time.

The second challenge is to move towards a model of mobility management known as **MAAS : "Mobility as a service"**: a synergy with SNCF website of e-commerce, leader in France - www.oui.sncf, formerly www.sncf-voyage.com - is still existing with BlaBlaCar and BlaBlaBus supply being integrated with the website. High-speed rail, which is deploying a low-cost service between the main cities of France (Ouigo), also appears on this website. The aim is to set up a transport supply combining long distance coach service on the main relations and ride-sharing for the last 200 and 300 km. The chairman of BlaBlaCar, Nicolas Brusson, is assessing the level of demand of 25 million passengers by combining ride-sharing and interurban coaches. Indeed, Oui.sncf is utilized by 16 million unique counts every month and can list 300 stops for BlaBlaBus in French cities, 300 HSR stations, 3000 regional trains stations, and then 30 000 meeting points from BlaBlaCar (Boudet, Les Echos, 2018). One of the main issues remains unanswered between BlaBlaCar and Rail monopolist SNCF: complementarity or canibalization?

BlaBlabus is also benefiting from the fast expansion of Ouibus on international level, which means very shortly challenging Flixbus: Ouibus, now BlaBlaBus, teamed up with Alsa in Spain and Portugal, National Express in the UK, and Marino Bus in Italy to create Europe's largest coach network, which implies serving 300 destinations in 10 countries (SNCF, Press release, 27.07.2018, p. 3). UK National Express is now teaming up with Alsa to gain an active participation in this strategy. One interesting point is the coming back to continental Europe of the worldwide leader National Express: the last financial statement of National Express is mentioning, "ALSA has recently established a joint venture – which also involves our UK coach business as well as Ouibus – to offer new international services across selected European countries. They have also submitted a bid with a local joint venture partner for a 400-bus contract in Rabat, to consolidate their presence in Morocco (NationalExpress Group, 2018, p. 25). After the disaster of Megabus (Stagecoach) in Germany and France – rapid expansion and fast retreat to sum up with high losses - the alliance between BlaBlaBus and National Express is particularly interesting and reveals its revival in Continental Europe. Probably, their main objective could be to challenge FlixBus.

The German Press has explicitly observed this evolution of the European market towards more competition:

"French are attacking Flixbus with a European alliance" (FAZ, C. Schubert, 19.12.2017)[5].

And the Chairman of the SNCF Group is supporting this strategy: "If Flixbus is thinking that she can dominate the market like in Germany, they will fail. There will ever be two players in the market[6]" (Guillaume Pepy, Chief SNCF – Ouibus).

[5] „Franzosen greifen Flixbus mit europäischer Allianz an" (FAZ, C. Schubert, 19.12.2017) : http://www.faz.net/aktuell/wirtschaft/unternehmen/franzosen-greifen-flixbus-mit-europaeischer-allianz-an-15348507.html

[6] „Wenn Flixbus glaubt, es könne den Markt wie in Deutschland dominieren, werden sie scheitern". „Es wird immer zwei große Spieler im Markt geben."(https://www.wiwo.de/unternehmen/dienstleister/flixbus-wachstum-vor-profit/14680498-3.html)

3.3 Which balance on a European perspective

One of the main criticisms facing this price battle between Flixbus and BlaBlabus is the impact of the revenue of the coach companies and then, maybe, the saving made on maintenance and driver wages. In mid-2019, a major Flixbus coach accident occured on motorway A9 near Leipzig that has highlighted the complex and very intensive operational process of Flixbus. In a report by the German Office for Freight Transport, the level of breach of the law on the regulation of travel and driving time observed in 2017 is relatively high for coach services: 12 % for 1346 control in coaches. The report is also mentioning the high level of illness among the drivers (Süddeusche Zeitung, 20.05.2019). Moreover, trade unions consider that only the most serious cases are registered.

Flixbus has agreement with 300 subcontractors which become 74% of the transport revenues. Some German companies have cancelled partnerships with Flixbus, so East European and South European companies are now operating for Flixbus. Wage convention – the famous “tarifvertrag” in Germany, one of the basis of the German Social Economy model - are not considered in this sector. 7000 drivers are operating in 2000 Flixbus coaches. BlaBlaBus will face the same issue and we can question if some European regulation should be implemented pertaining to this?

Strategies to reach the break-even point are now on the agenda of coach companies that are expressing this point of view in many public declarations and financial statements. Coach companies rely on a continuing growing market, looking for market segmentation (first class seats with reservation (Flixbus in Germany) options proposed within the main tickets). They also invest niche lines (ski resorts in winter for Flixbus) and develop hub and spoke strategies, for example from the Saint Exupéry Lyon Airport in France (BlaBlaBus). Sometimes, the coach companies avoid stopping in dedicated coach stations where some fees are applied. They also transfer some risk to subcontractors: new contracts impose incentives on performance on subcontractors and limit the mandatory financial contribution from the coach company to subcontractors.

New mobility services experience today a rash adjustment in strategies. In long distance transport, Flixbus and BlablaBus are now entering a period of time of heavy competition, which can be positive for the travelers, in terms of quality of services and prices[7]. In urban mobility, the situation is worsening for car-sharing with a lack of profitability if this business: Mercedes-Benz (car2go) and BMW (DriveNow) have reorganized their service, they join with the new common ShareNow service, which is a sign of reduction of competition and look for an exit. Mazda is also reconsidering its joint venture with Deutsche Bahn and Lidl and will stop its car-sharing service. Citroen-Peugeot also resigned in Berlin after launching Multicity very early in 2012. The main reason seems to be the rediscovering of the principles of the common goods, which imply no respect or a misuse of private users!

In the mobility world, now is the time for reshaping supply and looking for profitable markets.

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[7] There is a debate in Germany of introducing a toll on the coaches on motorway. There is already a “Maut” (toll) for the trucks.

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