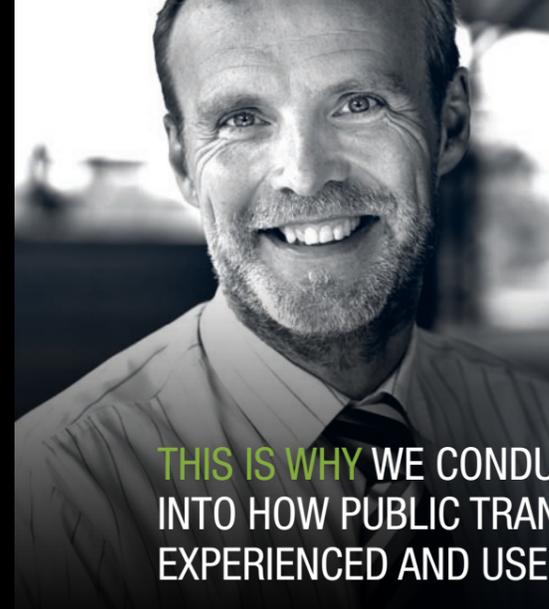


**SAMOT - RESEARCHING THE PUBLIC TRANSPORT  
OF TOMORROW**





Imagine a future when public transport is the first choice of the commuter. When the profitability of the industry relies on the needs of the individual and when its development leads to a sustainable environment.



## THIS IS WHY WE CONDUCT RESEARCH INTO HOW PUBLIC TRANSPORT IS EXPERIENCED AND USED.

The SAMOT research profile at Karlstad University focuses on the theoretical, methodological and empirical aspects of transport-related services. One of the main arguments is that the demand for customer-orientation and flexible transport systems will increase. This will entail new issues coming onto the research agenda – issues that the industry must work with in order to achieve the goal of making public transport an attractive and obvious alternative for human mobility.

Public transport as a field of research is nothing new. However, so far, research has focused mainly on technology and logistics but this does not contribute towards improving the customer's experience of a bus trip or a train journey.

- Improving technology and logistics alone will not guarantee more customers using public transport systems. This requires a wider perspective which involves people's preferences, habits, and experiences of their journeys. What mechanisms can make people choose buses, trains, or trams instead of their own convenient and treasured cars? This is one of the key issues that we investigate. In fact, this is one of the most urgent issues we face if we want to achieve a sustainable and more environmentally-friendly way of getting around in our day-to-day lives, says Margareta Friman, Head of the SAMOT Group.

The SAMOT Group received VINN Excellence Center status from the Swedish Governmental Agency for Innovation Systems in competition with several other successful Swedish research groups.

- The SAMOT Group has a strong research environment and international credibility based on its long-standing tradition of service research, says John Sören Pettersson, Dean of the Faculty of Economic Sciences, Communications and IT. Karlstad University has identified this research field as one of our major strategic areas. The work of the Group has also been evaluated by an international group of experts and researchers. Their report showed that the SAMOT Group conducts excellent research and that it has developed a successful model for collaborating with stakeholders in the public transport sector, both in Sweden and internationally.

The SAMOT Group is organised into three different themes. This division into themes is intended to increase the level of interaction between the different players and to promote synergies in research and collaboration. The themes are: Perceptions of public transport, Public transport's customer offering, and Public transport's regulatory and institutional frameworks. The themes come together in a unique overall perspective of public transport and travellers' habits. The research done results from the SAMOT Group providing important input into the public transport sector - companies on the one hand and politicians, policymakers, and legislators on the other.



## THEME 1 PASSENGERS' PERCEPTIONS OF PUBLIC TRANSPORT



**ATTRACTING MORE PEOPLE ONTO PUBLIC TRANSPORT IS A HARD TASK, BUT THIS IS THE MAIN GOAL OF OUR RESEARCH.** To understand those who avoid public transport, we need to know what motivates those who do choose it and how they experience the services offered. Theme 1 deals with passengers' perceptions and interpretations of public transport.

### BACKGROUND

Passengers' perceptions of their journeys are not only influenced by the transport provider's current operations, but also by factors over and above how the journey is implemented. These can be of a technical, psychological, and social nature. For example, the purpose of a journey has a major influence on the passenger's perception of it, irrespective of the objective circumstances otherwise prevailing.

### CHALLENGE

It is not enough to understand how the transport system is organised to understand the services it produces. Instead, a genuine understanding of the customer's perception and his/her perspective on the journey is necessary, both in order to define the service itself and to develop successful service strategies. Understanding the service on the basis of "the person it exists for" is something that constitutes the very essence of the service perspective, thus also being a theme which explicitly or implicitly reoccurs in all the projects the research group has undertaken. One way of increasing passenger numbers is to sway them towards using public transport services, instead of other types of transport-related services. Research needs to conduct advanced studies of the various possibilities associated with bringing an influence to bear. In the future, we will need more knowledge of the significance of involving the passenger in the service development process. Various methods of user involvement in public transport need to be illuminated.



Per Echeverri (top left), Margareta Friman (top right), and Lars Eriksson (bottom right) are three of the researchers active within Theme 1.



### ISSUES

Public transport is deemed capable of making an important contribution to sustainable development. In what way can we design today's transport-related services so that they will be perceived as providing a good level of quality and a pleasant experience? Not until this is achieved will passenger numbers increase, in all likelihood, enabling a reduced number of private car journeys. Assessing this requires good methods of determining passengers' quality perceptions. One important research task lies in conducting various method evaluations. A relevant question concerns how the assessments and experiences of various groups differ. Furthermore, follow-up studies need to be carried out during change work which are aimed at assessing the effectiveness of quality work.

## PROJECT

### ONGOING RESEARCH PROJECTS WITHIN THEME 1

#### Project 1.

##### Coaching

This project focuses on training and other activities that promote service-oriented behaviour at the staff level. One part of the project addresses issues such as organisational tension between control and support and the inconsistent use of assessment criteria. Another part addresses the issue of interaction between coaches and bus drivers and addresses questions concerning coaching design and individual learning.

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#### Project 2.

##### Daily travel and subjective life satisfaction

Motorized traffic is one important cause of negative impact on our environment. By changing people's travel behaviour, some of these effects may be reduced, however. Despite the implementation of different measures aimed at changing behaviour, positive effects have been limited. This study aims to investigate whether one reason for this could be that changes in transport behaviour affect subjective well-being (happiness) negatively, and thus we do not find it easy to change.

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#### Project 3.

##### Determinants of car user's switching to public transport for their work commute

The main purpose of this PhD project is to study how public transport services can be made attractive to car users. In particular, factors determining car users' mode of choice when travelling are investigated. Within the project, a method will be developed for investigating how car users might travel on public transport if the service offering were to change. In the future, this method can constitute a market research technique within public transport.

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The above are just a few examples of ongoing research being conducted within Theme 1 at SAMOT.

## THEME 2 PUBLIC TRANSPORT AND ITS CUSTOMER OFFERING



IN THEME 2, THE FOCUS SHIFTS TO THE ORGANIZATIONS PROVIDING PUBLIC TRANSPORT SERVICES. What do they offer their passengers, and in what way is this offering organized and produced? These two tightly-integrated questions are the common denominator for the research carried out under Theme 2.

### BACKGROUND

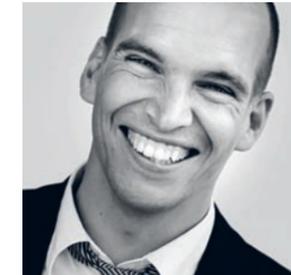
The customer's perspective in Theme 1 provides a natural point of departure for analyzing passenger services. A journey can be seen as a chain of events ("moments of truth") experienced by the customer. During this chain of events, the customer logic (how customers act and think during their journeys) is linked to the different resources and internal routines which the transportation company puts at the passenger's disposal. During each element of the journey, interactions occur with the company; these interactions can be with combinations of frontline staff, rolling stock, IT systems, physical/technical aids, environments, and, not uncommonly, with other customers as well. The journey is thus not just a question of what the customer gets, but also a question of how. Thus, analyzing and improving the service offering also becomes a matter of analyzing and improving how public transport is organised.

### CHALLENGES

The theme deals with several central managerial and theoretical problems. The role of technology in the provision of public transport services is one important area that needs to be studied in greater detail; in particular, in relation to new service development as well as the cultural aspects of service management. How different organizations can find constructive forms of working together under the constraint of a unified service offering is another key challenge. The latter issue also points to the operative role played by contracts and public tendering procedures in public transport.



Per Echeverri (top left), Markus Fellesson (top right), and Jörg Pareigis (bottom right), among others, work within Theme 2.



### ISSUES

How can new services be developed in a way that safeguards both profitability and a high level of customer-perceived quality? How will the practical work of the public transport providers be organised so as to enable the services to be provided as planned? How can this work be coordinated when different service providers are involved? Moreover, how can we bring out the full potential of the extended, enhanced, and refined customer offerings made possible by the transport sector as a whole? All of these challenges are ultimately about public transport's attractiveness and competitiveness, as regards both the individual company and public transport per se.

## PROJECT

### ONGOING RESEARCH PROJECTS WITHIN THEME 2

#### Project 1.

##### Organisational reconfiguration based on the service concept

In management research, concepts such as customer- and market-orientation, customer culture, and service climate have been put forward as desirable end-states to strive for. However, empirical studies show that achieving these is not very easy in practice, despite ambitious internal marketing, training, and empowerment programmes. This project deals with how development occurs in situations with double regimes, where a societal logic and a commercial logic are at work side-by-side. This project takes its point of departure in the latter logic and asks questions regarding how to make an organisation function in a customer-/service-oriented way along commercial lines, given the prerequisites of the industry.

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#### Project 2.

##### Quality from a system perspective

As the outsourcing of service provision has become an increasingly common business strategy, this has resulted in new managerial challenges when creating value for customers. The establishment of such inter-organisational relationships has resulted in additional actors performing more activities of a higher complexity. In this research project, the focus is on how the ideas of quality management, in general, and quality management systems, in particular, can be used as a strategy for managing this situation.

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#### Project 3.

##### The role of the service environment in the service experience

The importance of the physical and social service environments for the service experience is unquestioned. Little is known today about the interaction processes occurring between the customer and the service environment. The aim of this PhD thesis project is to improve understanding of these processes; in particular, how value is created for the customer and to identify the underlying drivers of favourable service experiences.

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The above are just a few examples of ongoing research being conducted within Theme 2 at SAMOT.

## THEME 3 REGULATION, INSTITUTIONAL FRAMEWORKS, AND RULES OF PLAY



“Rules of play are of vital importance to the economy, design, and quality of individual services.”

**LAWS AND REGULATIONS SHAPE CORPORATE CULTURES AND THUS THE PUBLIC TRANSPORT SERVICES.** Developments in society, the world around us, and the social play behaviour influence the development and objectives of public transport. Covered by Theme 3 are how this influence impacts on the services provided as well as what changes need to be made to improve passenger services.

### BACKGROUND

Services are provided and created in interaction with the customers within the framework of a larger social, economic, and political context. This context forms the foundations upon which the public transport service is organised in terms of business, operations, and encounter, defining the roles of the various players in the service and their mutual relationships, as well as relationships with the adjacent society. These basic “rules of play” – in research often called institutions – have shown themselves to be of crucial importance as regards the efficiency of entire economies, as well as the design and quality of individual services. During the deregulation and realignment that has taken place during recent decades, the conditions of the transport providers have changed radically: a previously sector-wide organisation has been broken up and new players have made their entrance. The objective has been to achieve a more market-adapted playing field and, in doing so, also create the prerequisites for the flexibility, effectiveness, and innovation capability believed to characterise trading in the private sector.

### CHALLENGE

Public transport can be seen as a value network which creates value-in-use for its users but which also creates common good for society, e.g. environmental protection, safety, security, and mobility, for regional development etc. Independent players operating in competition with one another are assumed to have stronger incentives to improve their operations and develop new, customer-oriented service concepts as well as more efficient production solutions. However, this has to be organized using local and regional value networks in various forms of private – public partnership. A functional and socio-economically efficient transport network presupposes a considerable level of collaboration, both between various transport operators and as regards infrastructure and support services. In such a situation, transport sector players must be made to act upon principles which combine collaboration and competition, in turn presupposing that the sector’s “rules of play” encourage such behaviour.



Patrik Gottfridsson (top left), Bo Enquist (top right), Mikael Johnson (middle), Samuel Petros Sebhatu (bottom left) and Carolina Camén (bottom right) are five of the researchers active within Theme 3.



### ISSUES

One contribution made by the Research Group is an analysis of the institutional structures of the area in the form of laws and regulations, as well as the forms and conditions of transport procurement and other commissioner-implementer arrangements. An equally important contribution is to look deeper into different value networks in both Sweden and other countries in order to learn and obtain good role models regarding the transformation process of going from a production logic to a more customer- and service-oriented logic within these value networks.

## PROJECT

### ONGOING RESEARCH PROJECTS WITHIN THEME 3

#### Project 1.

##### Market relations and relationship markets in public tendering

Procurement has become a central feature of public transport. This project’s aim is to increase understanding of how the managerial ideal of long-term development, based on cooperation and relations of trust, can be reconciled within the context of the more competitively-based and price-oriented logic that a tendering process traditionally implies. The goal is to document and evaluate a large-scale tendering process together with key actors at the procurement agency, in order to stimulate a process of learning and development for future procurements.

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#### Project 2.

##### Sustainable performance management

Today’s business models do not focus on customer-orientation or increased travel. The public transport sector is a true partnership between the public and private sectors. Benchmarking against other industries will provide a great potential to develop a more dynamic customer- and service-oriented business model. The purpose of the project is to create the conditions needed for a new business model that supports the public transport change process in its move towards increased customer-orientation, thus creating value and stimulating sustainable development when taking into account economic, social, and environmental perspectives which derive from a service logic. This is achieved through interaction with modern service research theories and concepts as well as deep empirical studies of interesting Swedish and international value networks.

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#### Project 3.

##### Key performance indicators

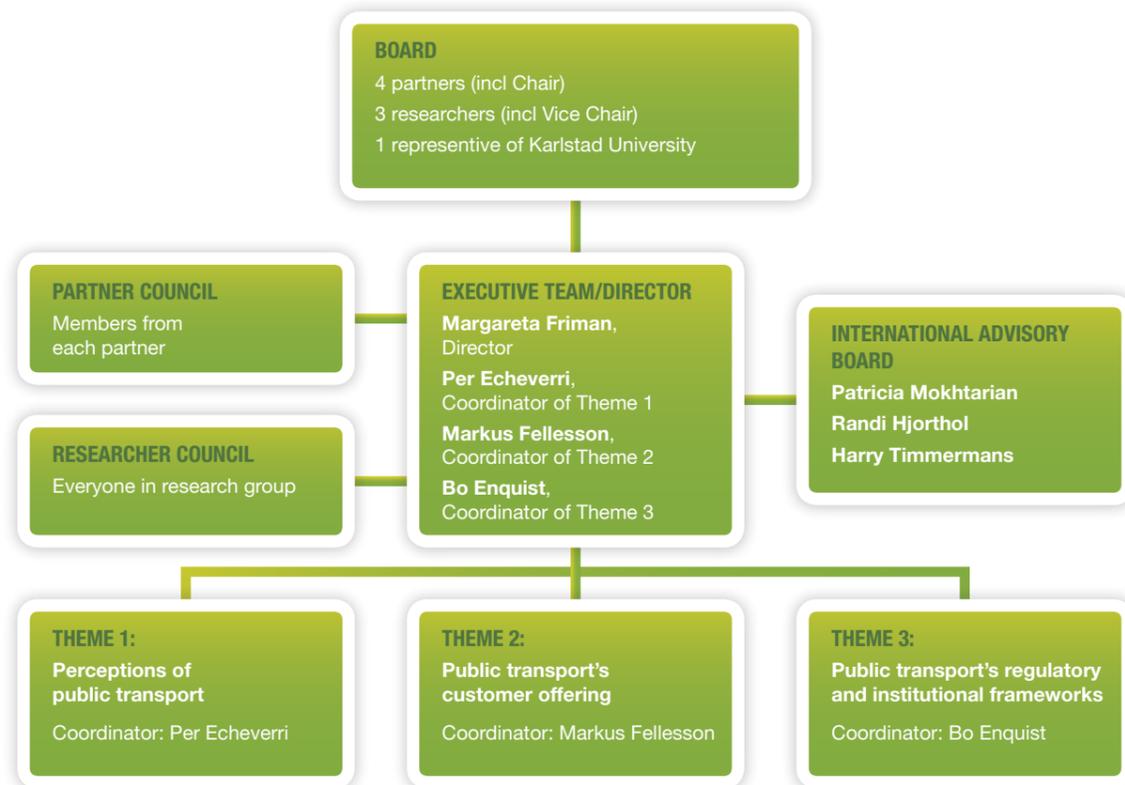
Public transport has a wide span of operations – from the metropolis to the countryside. Performance measures must capture this span. The aim of this study is to come up with key performance indicators which are customer-oriented and which relate to corporate social responsibility, i.e. take into account the economic, social, and environmental consequences of business operations. But also to find forms of auditing that support a sustainable business model for public transport.

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The above are just a few examples of ongoing research being conducted within Theme 3 at SAMOT.

## ABOUT SAMOT

SAMOT IS A VINN EXCELLENCE CENTER AND FINANCED BY VINNOVA which is a forum for collaboration between industry, the public sector, universities and higher education, research institutes, and other organisations conducting research. Our operational concept is to conduct multidisciplinary, internationally-recognized research via active collaboration. In doing so, the SAMOT Group will contribute to the long-term sustainable development of passenger transport services. The three related main themes constitute the basis for our research profile. The centre was established in April 2006. Today, there are 30 or so active researchers and research students at SAMOT whose Director is Margareta Friman, an Associate Professor in psychology. SAMOT's brief is to provide scientifically-rooted knowledge as a foundation for change within the industry.



### THE HEAD. OUR BOARD.

The Board is comprehensively responsible for operations at the centre. The Board is to work towards the common interests of the Parties and keep them informed about circumstances which considerably delay, or prevent the implementation of, the operational plan. The Board's duties include making decisions regarding individual projects after processing by the Executive Team.

### THE HEART. OUR EXECUTIVE TEAM.

The duties of the Executive Team include processing new research projects in collaboration with the Researcher and Partner Councils. Over and above this, the Executive Team

is to monitor project outlines, as well as progression and outcome. Our Researcher and Partner Councils are forums for discussion, work-orientation, applying for additional research grants, and planning for seminars etc.

### THE SOUL. OUR THEMES 1, 2, AND 3.

The division into themes is intended to increase the level of interaction between the different players and promote synergies in research and collaboration. These three themes are of great interest to our partners, while at the same time constituting exciting and in-depth research tasks well suited to PhD studies.

Charlotte Wäreborn Schultz  
Managing Director/CEO of the Swedish Public  
Transport Association and Chairman of SAMOT



– One strength of the research conducted at SAMOT is its explicit connection with society. My primary task, as Chairman, is to bridge the gap between researchers and industry.

## OUR PARTNERS – POINTS OF VIEW FROM THE REAL WORLD.

We are a VINN Excellence Center and thus we obviously work with our partners in various ways within the international transport sector. Collaboration is an important opportunity for gaining access to transport processes in the form of relevant data. SAMOT's projects can also intervene in these processes, thus ensuring the direct implementation of research results. Our partners are a part of SAMOT. Without them, our research would not deliver the same breakthrough results.



Kerstin Norén  
Rector of Karlstad University

– We are proud of the results accomplished by the research conducted at SAMOT. This echoes around the world. It is an important issue for the world community and a matter of priority at Karlstad University. Today, we are developing courses within this area at our university and this is attracting a lot of interest.

**SAMOT's** operational concept is to conduct multidisciplinary, internationally-recognized research via active collaboration with trade and industry, public sector players, and universities. In doing so, the SAMOT Group will contribute to the long-term sustainable development of passenger transport services.



**CTF – SERVICE  
RESEARCH CENTER**

**SAMOT** | THE SERVICE AND MARKET ORIENTED  
TRANSPORT RESEARCH GROUP