

# MASSACHUSETTS BAY TRANSPORTATION AUTHORITY

## REQUEST FOR INFORMATION

### Commuter Rail Mobile Ticketing Solutions

December 1, 2011

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Responses Due: December 23, 2011 5:00 pm Eastern Time

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#### **1. Purpose**

The purpose of this Request for Information (RFI) is to gather information on behalf of the Massachusetts Bay Transportation Authority (MBTA) regarding cost-effective, convenient, and innovative mobile ticketing solutions for its commuter rail system.

#### **2. Background**

The MBTA is committed to providing innovative solutions that make riding public transit easier.

In recent years, the MBTA has worked on a number of fronts to leverage customer's mobile phones to improve the experience of riding the MBTA.

In 2007, the MBTA launched its T-Alerts service to provide customers with service updates and information via text messages, email, and on MBTA.com. Since 2009, the MBTA has worked with 3<sup>rd</sup> party developers to provide real-time information through smart, innovative mobile applications.

The MBTA believes that the next frontier in leveraging customer's mobile devices is for ticketing. By giving customers the ability to purchase tickets and passes via their mobile devices, customers will have the power of a ticket office or fare vending machine in their

pocket. As a result, customers will have access to the convenience of purchasing and storing their tickets on their mobile device.

The MBTA's commuter rail system is the nation's 5<sup>th</sup> largest serving an average of approximately 70,000 customers each weekday. MBTA commuter rail provides service to 133 stations on 12 lines throughout eastern Massachusetts.

The MBTA commuter rail system has a zone-based fare policy covering 11 zones (1A and zones 1-10) with fares increasing as the zone increases. Customers traveling between zones are charged intermediate fares based on the zones traveled. Students, seniors, and the disabled receive discounts. The majority of tickets sold are in the form of passes including the monthly, 10-ride, and 12-ride tickets with many pass sales made through the MBTA's group buying programs. Tickets are sold at ticket offices, vending machines in major stations, retail sales locations and by staff onboard trains.

### **3. Project Overview**

#### **3.1 Goals**

Through this RFI, the MBTA is interested in gathering information on solutions that meet the following goals:

1. Allow customers to purchase all commuter rail tickets and passes via mobile devices. The user interface must be available on all major smartphone platforms and provide simple menu driven capabilities with minimal typing required.
2. Device-independent, software based platform designed for portability, simple implementation, and maintenance cost control.
3. Designed to grow and evolve as the MBTA's business requirements change.
4. Allow conductors to validate tickets and passes visually during an initial phase while supporting open, commodity devices (such as smartphones) for validation in future phases.

#### **3.2 Key Features**

The MBTA is interested in gathering information and understanding proposed solutions that:

- Allow customers to make single-ride, round-trip, or time-based pass purchases following the MBTA's zone based fare policy.
- Support a carrier-independent, mobile phone application for ticket purchases on the major smartphone platforms: iOS, Android, and Blackberry OS.
- Provide a secure, compliant, PCI PA-DSS software solution.
- Allow customers to complete secure transactions using credit or debit cards.
- Allow customers to view and manage tickets and passes purchased in a "ticket wallet."
- Allow conductors to validate tickets and passes visually during an initial phase while supporting open, industry-standard devices for viewable validation in future phases.

- Allow the MBTA to track statistics on the use of passes and ticket types.
- Integrate customer information including schedules and real-time location information of trains.

#### **4. Points of Interest**

The MBTA is specifically interested in the following points of interest:

- Extent to which a solution would support the various tickets and passes currently sold by the MBTA to commuter rail riders. A full list of tickets and passes are listed here: [http://mbta.com/fares\\_and\\_passes/rail/](http://mbta.com/fares_and_passes/rail/).
- Describe how customers would purchase tickets and manage purchased tickets.
- Describe how your application is ADA compliant.
- Describe how you would manage customer support including the handling of refunds and adjustments.
- Describe the costs of your solution including implementation, maintenance, software upgrades, and fees.
- Please describe a timeline for implementing your solution at the MBTA, including any phases.
- How would the MBTA access and maintain customer account, sales, and usage/ridership information?
- What would you propose as the optimal solution for training MBTA employees, in particular conductors, in using your solution?
- Please explain how your application would allow for visual ticket validation, without the aid of any validation device.
- Please explain how your application would support validation with an industry-standard, device.
- Please describe how you would propose to market your solution to MBTA customers.
- Please describe any intellectual property issues relating to your technology or solution.

#### **5. Responding to this RFI**

##### **5.1 Who May Respond**

Vendors or organizations with an expertise in implementing electronic, mobile device based commerce and ticketing solutions.

##### **5.2 Response Content**

Responses to this RFI should including the following content:

- A Cover Letter – The cover letter should include a summary of your organization’s interest and background in providing electronic, mobile device based commerce solutions.

- Responses to the goals, key features, and points of interest described in this document.

### **5.3 Response Submission**

One electronic copy in ISO 32000-1:2008 Portable Document Format (PDF) should be sent to **jrobin@mbta.com**. Any hard-copy documents should be sent to the MBTA contact at the postal address below.

Joshua K. Robin  
Special Assistant to the General Manager for Innovation and Special Projects  
Massachusetts Bay Transportation Authority  
10 Park Plaza, Suite 3910  
Boston, MA 02116

Responses to this RFI must be received at the MBTA **no later than 5 PM US Eastern Time on December 23, 2011**.

Other communication regarding this RFI should be sent to the same contact listed in this paragraph.

### **5.4 RFI Response Contact**

Organizations responding to this RFI shall designate a single contact within that organization for the receipt of all subsequent information regarding this RFI.

### **5.5 Reimbursement**

The MBTA will not reimburse organizations responding to this RFI for any costs in conjunction with their responses to this RFI.

## **6. Response Review Process**

### **6.1 Acknowledgement**

The MBTA will acknowledge receipt of materials via electronic mail to the address from which the materials were sent.

### **6.2 Review Process**

RFIs are issued by the MBTA with the intent to survey the industry and obtain information that provides the MBTA with an understanding of the range of products and services that are available in the market, vendors' experience in deploying these products, and where these products have been deployed. Numerous MBTA departments will review responses to this RFI.

### **6.3 Clarification**

To fully comprehend the information contained within this RFI, the reviewing group may seek further clarification. Clarification may be requested in the form of brief verbal communication by telephone; written communication; electronic communication; or a presentation of the response to a meeting of interested parties at the MBTA.

RFI respondents may be invited to present responses to numerous MBTA departments. The purpose of this presentation would be to seek clarification of information contained within the response (as noted above), to further explore issues raised, or to further meet the goals of the RFI.