Platform for
International Rail Passenger Transport

Established after Ministers' Declaration June 2020

Better railway connections for Europe's passengers

A common agenda

Fourth Integrated Progress Report

2024

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0 Management summary

Since the start of the IRP in 2020, notable progress was made in a number of ways, as detailed in the present Integrated Progress Report, as well as in the 2021, 2022 and 2023 reports. The platform decided that in its 2024 report, emphasis should be laid on the development of the international rail passenger market. Monitoring this market development and obstacles encountered is therefore key part of this progress report. For the first time, all IRP countries participated in the monitoring of the international passenger rail market. This important result shows positive market development and signals that more services are in the making.

Table 1. Key monitoring figures 2024 (EU + Norway, UK, Switzerland)

Type of train	*Regional*	*Long-distance*	*High-speed*	*Night train*
Connections Europe	150	159	68	59
Average daily	7,5	3,1	3,6	0,9
Aggregate	1.122	493	246	54
Trains total	**1.916**			
Capital-to-capital connections	**35**			

In addition, important was the concretisation of areas requiring further discussion between the Member States, between the Member States and the Commission, between the Member States and the sector, and between the European Commission and the sector. These areas can be expected to figure at the forefront of ongoing and future work towards improved international railway passenger transport. It is recognized by all parties that the work must continue progressively.

In the present progress report, the IRP lays emphasis on the crucial discussion pertaining to customer experience and digitalisation. In addition, a number of other critical enablers is discussed. Regarding ticketing, the platform discussed with sector parties the progress on voluntary initiatives such as the CER ticketing roadmap with its objectives for 2025. Voluntary progress by the sector is key to achieve results for passengers.

The platform recognised that progress on the regulatory framework is urgently needed to ensure sufficient progress in practice by the rail sector and ticket vendors. Regarding the regulatory framework, relevant initiatives at EU level are:

- Data standards, as part of TSI Telematics. Decision making foreseen end of 2024.
- New EC initiative on Multimodal Mobility Services (MDMS). Postponed.

Modal shift towards international railway passenger transportation is crucial. The Platform therefore also considered an array of critical enablers, including:

- Completing the TEN-T infrastructure network
- Technical interoperability
- Governance and capacity allocation
- Intermodal connectivity
- Availability of rolling stock
- Night trains
- Regulatory framework and competitiveness of the rail sector.

As many of these topics are interdependent, the Platform members emphasized it is crucial that progress continues across the board. Moreover, considerable progress is possible within existing legal frameworks. The Platform therefore made a number of recommendations.

1 Introduction

1.1 The IRP platform

This fourth Integrated Progress Report of the Ministerial Platform on International Rail Passenger Transport (IRP) sets forth the progress made, over the 2023 – 2024 period, regarding the ministers' declaration of the Ministries of Transport of the EU Member States, Switzerland and Norway. During the Transport Council on June 4, 2020, the European countries embraced the initiative to work on a common agenda aimed at fostering and supporting the improvement of international railway passenger transport in cooperation with the relevant stakeholders. As a result of the political declaration, a joint platform of the EU Member States[1], Norway and Switzerland was set up to further facilitate discussions. In 2022, the United Kingdom acceded as an observer. The platform is supported by sector parties and the consumer organisations including BEUC / European Passenger Federation (EPF). It also involves representatives of the European Commission, European Union Agency for Railways, OTIF, and EU-Rail. Panteia supported the Platform in drafting this report.

The IRP platform decided in its terms of reference for the 2023/2025 period to focus on reporting on results in the international passenger rail market and work on removing bottlenecks with all partners.

In 2023 /2024 IRP organized meetings in Luxembourg and London with site visits on station-intermodality / workshop Eurostar. On the agenda were:

- Diversionary routes;
- Combining the conventional and high speed networks;
- Passenger experience, rail ticketing

In addition, a workshop was organized on intermodality air/ rail and also rail and other modes of transport. The platform served as a networking place for MS / sector to foster innovation and support various bilateral exchanges on cross-border services.

1.2 Vision

The Member States, as well as the European Commission, sector parties and passenger representatives are aware that continuing the status quo pertaining to international railway passenger transport is not an option. The international transport systems of Europe need to be adapted to face today's challenges. An interconnected and competitive network of rail passenger services will underpin the economic, social, and environmental sustainability of our continent. It will advance realisation of the Green Deal, securing modal shift whilst enhancing sustainable mobility; strengthen European cohesion by reinforcing connectivity and fair development, not only in the most densely populated areas but also with less well-connected regions.

Extensive improvements are imperative in the way international railway services are offered, marketed, and performed. Improvements to the availability and online distribution of tickets, travel information, onboard services and better support during disruptions are required.

[1] With the exception of Cyprus and Malta.

Additionally, a fully integrated and harmonized infrastructure network is needed, with optimised use of capacity, ensuring frequent and efficient passenger services connecting key passenger hubs. The full achievement of the Single European Railway Area is therefore vital. All parties involved have a key role to play in removing the barriers that exist related to digitalization, infrastructure, rolling stock, and legislation.

The IRP considers the following principles to be essential:

1. Enabling rail to become the preferred mode of cross-border passenger transport in Europe;
2. Providing high-quality and resilient rail infrastructure and capacity;
3. Making railways more competitive vis-à-vis air and road transport;
4. Investing in national and cross-border railways.

The development of more attractive and new concepts for international services and their connectivity must first be based on sound market analysis to inform estimates of their long-term viability and therefore sustainability. To provide easy access to simple, reliable, and comprehensive information to customers, digitalisation will be an enabler (through an increased use of e-ticketing and a better access to dynamic travel information for instance). Enhancing interoperability, coherent timetabling, and capacity management as well as completion of missing links and removal of bottlenecks are prerequisites for seamless cross-border journeys.

In order to deliver the economic and consumer benefits of competition, the competitiveness of the rail sector is essential, while the coordination between different service providers that is necessary to ensure the synergies of an inter-connected European rail network will require appropriate regulation. Creating equal conditions for all international passenger transport modes will make pricing more transparent and railways more competitive. Finally, improving investment in accordance with market and societal needs is crucial for the successful realization of the international rail passenger network. Long-term investment planning and coordinated infrastructure maintenance and development are needed to provide high quality international rail passenger services all over Europe.

1.3 Status of the document

The present Progress Report sets forth the progress made over the last year. The members of the IRP invited the European Commission, ERA, EU-Rail, OTIF, sector parties and other stakeholders to consider the findings of this report in the conduct of their works, in particular in view of the European Commission’s action plan on international railway passenger transport.

This document is written by the ministries, taking into account the results of the discussions among the members of the Platform, and between the platform and the aforementioned stakeholders. The document does not imply any legal, policy, or financial obligations.

2 Development of the international rail passenger market

2.1 Introduction

Over the last years, international rail passenger services have attracted renewed attention. Awareness grew among the Member States, as well as the European Commission, sector parties and passenger representatives that continuing the status quo pertaining to international railway passenger transport is not an option. The international transport systems of Europe need to be adapted to face the challenges of the climate crisis. An interconnected and competitive network of rail passenger services will underpin the economic, social, and environmental sustainability of our continent. It will secure modal shift whilst enhancing sustainable mobility, and strengthen European cohesion by reinforcing connectivity and fair development, not only in the most densely populated areas but also with less well-connected regions.

It is recognized by the parties that expanding and improving the European network of international rail passenger services is a complex and multi-year process. Also, this fourth integrated progress report, includes only the second iteration of the IRP's monitoring of the market, which is to be reiterated and improved further over the coming years. Nevertheless, a number of important observations can be made regarding the main features as well as the ongoing development of the market.

2.2 Progress

During the typical working day, the European Union, Switzerland, Norway and the United Kingdom are now served by some 436 international railway passenger services. Regional cross-border connections total over 150, with an average frequency of 7 to 8 (unidirectional). On top of this, almost 160 direct intercity services are operated, with an average 3 daily trips. High-speed services count a total of 68, on average offering 3 to 4 trains per day. Finally, 59 night train connections are available. Together, these services make up for a total of 1.916 trains per day. Among many origins and destinations throughout Europe, the number of direct connections between capital cities amounts to 35 (these figures were already displayed in the table on page 1 and are further detailed in chapter 6).

International train services currently offer capacity for half a million people per day. Based on 300 operational days per year, the annual capacity of some 150 million passengers can be called significant, even compared to the turnover of a large European airport (e.g. Heathrow Airport transported some 79 million passengers in 2023, with Schiphol and Frankfurth following with 62 and 59 million respectively). Although the available data for regional services still has its limitations, this segment clearly has the greatest number of trains. Their relatively high frequency enables these services to be the largest segment in number of passengers. Taking into account the capacity of the trains, long-distance and especially high-speed services are also crucial segments. With average capacity of some 400 persons per train, especially high-speed services seem to offer large future potential. In addition, today most international passenger services are still organized by public service obligation (PSO). However, recent efforts to enable more competition have resulted in a 27% share for Open Access services.

The total number of connections currently foreseen to be started during the next decade is 67, with long-distance (25) and night trains (16) being the most prominent, followed by regional (13) and high-speed trains (13). These initiatives involve a mix of PSO and open access services and pertain to a range of European countries. Notwithstanding this positive trend, as will also be detailed later on in this report, the availability of infrastructure as well as train paths must still be regarded as an essential barrier for expansion of the network. Although the ten ongoing pilot projects facilitated by the European Commission are an impetus for stronger interoperability, the completion of the TEN-T network and more efficient capacity management are key.

2.3 Conclusions

At present, Europe is served by a significant network of international rail passenger services, with more services being prepared. With total capacity of some 150 million passengers per annum, the railway network is considerable even compared to Europe's large airports. Nevertheless, it must be concluded that sustained growth of rail passenger services is possible only when key barriers are addressed.

3 Customer experience and digitalization

3.1 Introduction

As the Platform noted in previous years, customer experience for international passenger rail is currently not prioritized sufficiently. A positive customer experience depends on far more than the actual journey: it starts with the planning and ends only when the post-trip arrangements are completed, in case they are needed.

Despite the growing awareness among passengers about the CO2 footprint of their travels, the primary considerations for consumers when arranging a trip remain price and time, as evidenced by findings from the Eurobarometer survey on mobility and transport. Therefore, the majority of passengers will only transition to rail travel if they perceive it to be comparatively more cost-effective or faster than air travel. Digitalization has the potential to contribute greatly improve the functions needed to this aim. Full availability of timetable and tariff data and real-time information is prerequisite for smooth international journey planning and railway operations. However, availability of these data is limited. In addition, the process of buying and selling international railway tickets is not consistently customer friendly. It takes navigating through various ticketing systems and pricing structures across different countries. This fragmented set-up not only complicates trip planning but also disrupts multi-modal journeys, forcing passengers to purchase separate tickets for each leg of their travel.

Playing field conditions are not only relevant for competition between rail and other modes, but also in an intramodal sense. All other transport modes have intramodal competition and thus benefit from innovation and customer choice, whereas new entrant operators in rail still only have between 6-8% market share within the mode. Enforcing impartial retail, data sharing and through ticketing, in conformity with the FRAND principles (fair, reasonable, and non-discriminatory competition) is ultimately expected to contribute to modal shift. However, still much work needs to be done in that regard, whereas there is no agreement yet on legislative action or whether the matter should be left to sector initiative. Also, current developments at the European level include a number of important activities that should be considered in coherence. This involves the update of the ITS Directive (Directive 2010/40/EU) and the Delegated MMTIS Regulation (Regulation 2017/1926). These discussions pertain to the MDMS process and a variety of national and international initiatives, pilots and activities with regard to rail as well as the multimodal sector.

3.2 Progress

As stipulated in Regulation 2021/782, IMs and RUs are obliged to make available information on both timetables and tariffs, required for smooth international operations and passenger information. Although in a number of MS the sharing of real-time information is performed well, there still is a significant improvement potential due to not yet fully implemented data standardisation and insufficient digitalisation. This is partly due to insufficient digitalization as well as not yet fully implemented data standardization in the rail sector. Furthermore, data exchange between domestically oriented ticketing systems of the railway undertakings, other operators and ticket vendors, presents untapped potential.

The requirements for publishing timetable data and tariffs are already obligatory since 7 June 2023, but not yet fully implemented. In addition to the aforementioned Regulation 2021/782, the Delegated Regulation (EU) 2017/1926 (MMTIS) stipulates that data holders shall provide

their respective data (listed in the Annex of 2017/1926) via the national access points. Member States have an important role in setting up these national access points, which shall make accessible for data users the static, historic, observed, and dynamic travel and traffic data of different transport modes, including data updates, provided by the data holders. Furthermore, the Delegated Regulation 2017/1926 lays down that Member States shall reach an agreement, in cooperation with relevant ITS stakeholders, on the metadata requirements. The data holders shall ensure that they provide the metadata on the basis of those requirements.

Depending on how these data are made available on the national access points, an important aspect is for the Member States to make sure that the data sets are compatible in the national profiles. As a minimum, a national register is needed (which would include at least metadata and a reference to the data source), as well as to consider a national regulation to ensure that international interoperability is included. Also, the Member States need to ensure the implementation of Regulation (EU) 454/2011 (TAP TSI) by all railway undertakings, to share the timetable and tariffs (including fare tables for basic fares but also discounted fare types) data with other railway undertakings, public authorities and 3rd parties (e.g. ticket vendors).

For ticket distribution, common standards are needed, to which all stakeholders have equal access. Also underlined is the importance, particularly in the light of recent legal cases involving railway undertakings in certain Member States, of passengers having access to information and commercial conditions on all reasonable journey options, integrated information on timetables and fares (together with other information likely to affect consumer choice such as reservation possibilities, catering provision, class of travel offered, etc.), and provision for comparing all reasonable options, including multi-modal products and those marketed by third parties.

The project OSDM (Open Sales Distribution Model) was released in 2020 under the supervision of the UIC with this goal in mind. CER published the 'Ticketing Roadmap' in 2021 with the objective of implementation of 8 improvements for travellers by 2025 and another 5 by 2030. For example, there should be minimum standards for international tickets, with regard to products, price calculations, passenger categories, rules for refunds etc. Attention is also needed to practical issues regarding access and (commercial) conditions using OSDM. An alternative format, NeTex (based on Transmodel) was developed as a CEN standard in 2014, and was formally established as a requirement in the MMTIS regulations in autumn 2017. Since then it has been used for multimodal transport all over Europe.

The initiatives to make ticketing easier, as well as to introduce new ways of distributing tickets through third parties, still need to be implemented in full. The CER, within the framework of its 'Ticketing Roadmap', has reported that 6 out of 24 participating operators will have implemented OSDM by the end of 2024. At the time of drafting this report, OSDM is already implemented in Sweden. NetEx has been applied in Norway since 2017, and all necessarry functionallity for long-distance services was included in 2021. However, both standards' features still require further development and simplifications.

Current shortfalls include digital tickets and the opportunity to sell or be part of mobility packages. However, the identified shortfalls are not primarily technical. RUs typically want freedom to exercise maximum commercial flexibility. Passengers, understandably, require the ability to purchase through-tickets at transparently competitive prices having been informed comprehensively about all the reasonable journey options. Policy analysts are aware that the great majority of passenger journeys are made using PSO-regulated (and

guaranteed) services. Some therefore argue that this should be reflected in the extent to which RUs are allowed to exercise unfettered commercial freedom, whereas others place greater emphasis on the potential for innovation in an unregulated market. These considerations fit within the current preparations for the MDMS Regulation. Also, the possibility of third party sales is considered important.

Research evidence suggests that many potential passengers are deterred from using rail for international travel – even when they have found ways of accessing the information necessary to plan a cross-border journey – because they fear the effects of disruption and delay on the validity of the tickets they hold. Passengers need the assurance of consistent support that will enable them to reach their destination at the earliest appropriate opportunity and at no extra cost when their journey is disrupted, whichever the operators involved, wherever the country they are in, and whatever the relevant tickets held for the journey. CIT's Agreement on Journey Continuation (AJC) provides a start for a guarantee of this sort although its inter-availability between operators is limited. Also, the agreement does not cover assistance or compensation due to the delay or cancellation, whereas a number of other conditions are limiting its efficacy. Some progress has been made during the last year by CIT and CER, in conjunction with EPF, in improving the AJC's appeal and increasing the number of participants. Additionally, AJC signatories represent around 90% of rail passenger traffic in the EU, however these are a minority of the RUs. The AJC's existence and provisions need to be made known to every potential passenger when searching, booking and making their trip. Also, passengers can only continue a guaranteed journey travelling on condition that the later train is operated by the same company whose planned service was missed and for which a ticket was bought.

With regard to people with reduced mobility, progress is needed on online information on special fares, which may require a regulatory obligation. Big step forward was made in 2024 with the directive on European Disability card that will ensure proof of entitlement to these special fares in all countries.. This harmonized approach towards tariff rules should also be considered for other categories of passengers with reduced tariffs, – (e.g. with regards to flexibility (change of trains, exchange, refund), customer segmentation and age groups, application of reduction cards or acceptance of rail passes, definitions of items (luggage, bikes), necessary ID documents) – some of which may require changes to national legislation.

Besides the aforementioned aspects, it has to be emphasized that the discussion around ticketing and MDMS is of importance not only for the rail sector, but also for enabling multimodality (including with regard to complementary mobility services such as on-demand and sharing services). In this respect, it is of the utmost importance to avoid further 'silos' and consider this complex environment in developing national positions, cooperation structures and/or appropriate rules (either commonly accepted rules of play or more binding guidelines). Some Member States are already in this process. An example is Austria, which is currently leading a national stakeholder process bringing together actors from the various modes to develop a national position on the needed cooperation structures, roles and responsibilities of the different actors and the rules of play to enable MDMS services. In 2019 a partnership with stakeholders from North Rhine-Westphalia and the Netherlands has started the MaaS-Limburg/Easy Connect. At the moment travellers can already plan, book and pay for multimodal cross-border trip with their own national app using their smartphones. The project connects existing ticketing systems in the two countries, with plans for further expansion. The results of this pilot could serve easily as a blueprint for similar initiatives across Europe.

3.3 Conclusions

From a technical point of view, the ongoing development and implementation of common data standards are vital steps that must continue without delay. However, the Platform considered that for reasons of efficiency, standards should be further developed in complimentary rather than competing fashion. To do so would require, first and foremost, a convincing solution for any competition related concerns pertaining to data standards being developed. Specifically, it should be guaranteed that third parties (i.e. ticket vendors) are provided with full data and fair remuneration on equal terms. Also, any common standard should enable through ticketing for an optimal customer journey, regardless of the RU.

The Platform considered that ongoing work on the MDMS regulation may come a long way in addressing these requirements. However, it emphasized that the urgency of providing more and better international services dictates that regulatory discussions should not negatively impact the work on technical solutions.

In a similar vein, while the continuous exchange within the rail sector focussing on international services is highly important, the multimodal aspects in context of the MDMS discussion should also be duly addressed. It is important to build on the momentum regarding MDMS and the discussion around ticketing to foster multimodal transport services. Member States can and should make use of this window of opportunity to foster the shift towards more multimodal and sustainable transport, including before and after international rail journeys. One possibility is starting or emphasizing the national discussion with multimodal stakeholders and developing a national position on how integrated mobility services including multimodal booking and ticketing can be enabled.

4 Other critical enablers

4.1 Introduction

In order for the EU to achieve its environmental targets as laid down in the Green Deal, modal shift towards international railway passenger transportation is crucial. Next to customer experience and digitalization, the Platform therefore considered an array of critical enablers, including:

- Completing the TEN-T infrastructure network
- Technical interoperability
- Governance and capacity allocation
- Intermodal connectivity
- Availability of rolling stock
- Night trains
- Regulatory framework and competitiveness of the rail sector.

Next to completing the TEN-T network, including technical interoperability standards, the governance framework for cross-border services retains important barriers related to the allocation of train paths, as well as differences between European countries on track access charges.

A key obstacle for new services are the overall large investments that are required for acquiring rolling stock. These make it difficult for smaller entrants to arrange for the necessary investment guarantees. In addition, the lack of rail interoperability in Europe impedes the birth of a functioning second-hand market for rolling stock. For night trains, specifically, these matters are all the more pressing due to the relatively high operational costs. At the same time, path allocation is often especially challenging: night trains arrive during rush hours, have specific characteristics (stopping at a limited number of stations, faster than regular trains) and require smooth international paths unhindered by night track maintenance.

Finally, in order for rail to compete with other modes, including air travel, ultimately equal competition should be created. In addition, alignment with the objectives of the Green Deal means that a lower VAT, fuel tax, carbon emission trading and employment condition treatment should be considered for green transport modes.

4.2 Progress

4.2.1 Network and technical interoperability

Europe's railway network was given a renewed basis with the adoption of the revised TEN-T Regulation by the European Parliament 24 April 2024. A prerequisite for a high-quality network of international rail passenger services, the new Regulation stipulates an extension of the core network per 2040, which is to be fully electrified, ERTMS equiped, and allow for speeds of up to 160 km/h. These infrastructure service level goals were put in a strategic context by the Sustainable and Smart Mobility Strategy of the European Commission (SWD(2020) 331 final), which is set ambitious growth targets for rail, for long distance/high speed passenger rail segment to double the ridership by 2030 and triple it by 2050.

In addition to the ongoing endeavors to complete the TEN-T infrastructure network, the Platform reaffirmed that development of a full web of international rail passenger services depends on advancing rail interoperability. Interoperability pertains to purely technical standards, but also to procedures for authorization and capacity management.

The ten passenger pilot projects carried out under the auspices of the European Commission and kicked off last year are regarded as an important impetus for better interoperability. The Commission's support for the pilot projects is not financial assistance (as the 4th Railway Package envisions that rail services in Europe should develop driven by market initiative), but rather technical assistance to overcome barriers that risk market entry by new or improved services. Barriers for international services, including related to capacity allocation (journey time, path consistency and reliability, etc.), are being tracked down and tackled. While the Commission pilot program covers all kinds of entry barriers (ranging from vehicle authorization, border control or competition issues to ERTMS, rolling stock financing or ticketing), RNE was contracted by the Commission to focus on the capacity management issues of the Pilots. Beyond the direct support to pilot RUs and bringing together the relevant IMs, in addition, RNE is evaluating the process and will then provide recommendations to the Commission on necessary adjustments to current and future procedures and rules for capacity planning and allocation at national and European level. These Recommendations will also be shared with the Platform as cross-border capacity allocation is a shared responsibility between Union and member state levels therefore many recommendations can be of high relevance to member state ministries of transport.

This was also underlined by a survey conducted among the passenger pilot applicant RUs that showed:

- Pilot RUs consider four key factors (speed, reliability, and consistency of the train path) regarding the quality of cross-border timetabling;

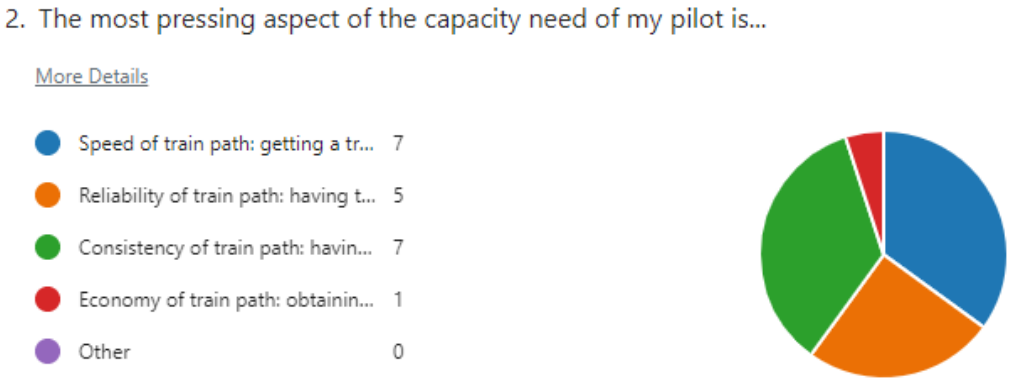


Figure 1. Pilot RUs' key factors for quality of cross-border timetabling

- Pilot RUs consider the key stakeholders of capacity management to be on national level (Member States, Infrastructure Managers);

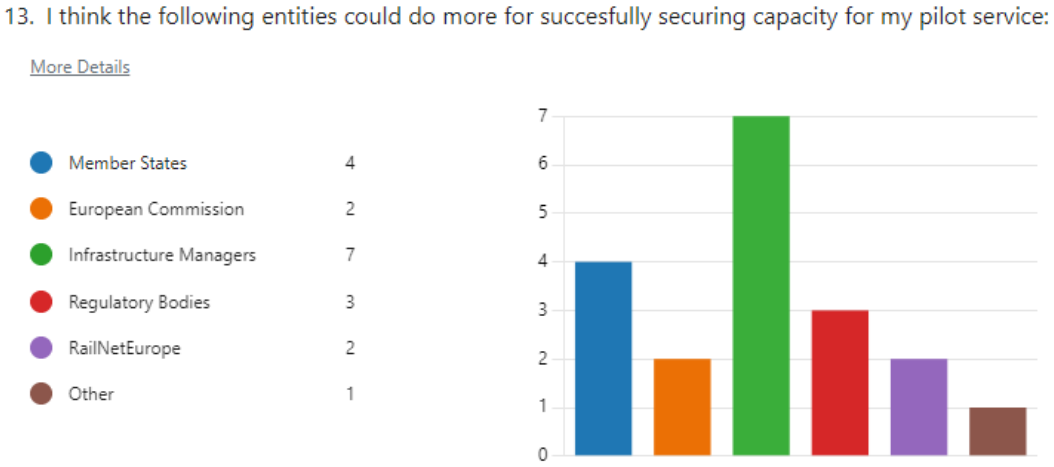


Figure 2. Pilot RUs' key stakeholders for capacity management

- Pilot RUs assess the current level of cooperation between infrastructure managers as insufficient.

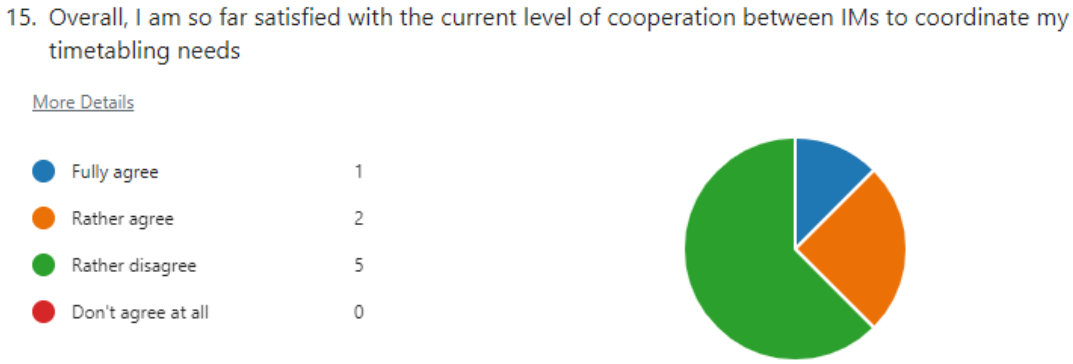


Figure 3. Pilot RUs' assessment of cooperation between IMs

For all of the four problem areas (Speed of train path; Reliability of train path; Consistency of train path; Commercial viability of train path) a gap analysis was undertaken with specific input from Pilots and general themes identified in previous studies. This gap analysis is the basis for recommendations that are currently being reviewed and transformed into the final recommendations by a Task Force set up for this purpose. The final recommendations are expected to be endorsed by the December 2024 General Assembly of RNE.

In-depth analysis of the railway undertaking experiences during the passenger pilots yielded the following basis for the future recommendations in the four problem areas:

Speed of train path: pilot applicants struggle to reach their travel time goals that would be required for an attractive market product – in many cases the mismatch between the envisioned, competitive run time and the run time offered by the IM can be measured in hours. Key identified problem drivers were:

- Complex multi-network capacity needs (ie. without a domestic stakeholder) are "invisible" to IMs until engagement from applicant. It is then usually too late to re-design capacity plans and applicant gets "leftover" capacity.
- Pilot Applicants experience that their path requests are de-prioritized against PSO covered domestic traffic and/or capacity needs of TCRs (esp. for night trains). There is no framework to give commercial cross-border trains appropriate (not absolute) priority.
- There is no European framework that sets realistic expectations for cross-border/long distance passenger capacity needs that could input advance planning (incl. TCRs) before engagement from applicant.

Reliability of train path: for commercial viability, it is important for pilot applicants to be able to provide the same train product to their customers for a longer operational period. Many commercial operators face last minute timetable changes or cancellations due to change of infrastructure / capacity availability. Key identified problem drivers were:

- Pilot Applicants have no planning stability over a single timetable year. This increases their risk to enter new markets where there are no proven timetabling solutions.
- Framework Agreements would be a means of planning stability but multi-network operators find them hard to obtain. Existing Framework Agreements do not always guarantee that acceptable timetabling solutions will be found at the annual planning even if capacity is scarce due to TCRs or congestion.
- Framework Agreements are an assurance of business continuity for RUs when they rely on loans to fund rolling stock. If there is no FA, there are no new trainsets to launch new services. FAs don't need to fix timetables by the minute but specify capacity in a level of detail that IMs can later on realistically deliver by.

Consistency of train path: in order to be able to deliver a commercially viable service, pilot applicants would need to receive a single, consistent path offer. Currently, pilot applicants often bear the commercial risk of receiving partial path offers that mismatch at border points, leading to uncompetitive or even unfeasible train paths and therefore cancellations. Key identified problem drivers were:

- Annex VII of SERA Directive outlines the timeline of annual timetabling but it is subject to diverging considerations in some member states (ie. due to involvement of regulatory body)
- Currently, until the new capacity regulation is adopted, there is neither legal obligation to actually use already existing common IT tools (such as PCS and the TCR tool), nor to commit to gradually implement TTR, even if commitments are made at RNE GA level by IMs.
- Without legal obligation, IMs find it hard to allocate constrained funding to IT and administrative needs of TTR. Therefore, not all IMs are currently using the RNE harmonized IT tools and processes.

Commercial viability of train path: While the issue of track access charging is usually understood not as part of the capacity management, but as part of the market conditions problem tree, it was observed in the Passenger Pilots that TAC has tangible effects in capacity management. Key identified problem drivers were:

- Track Access Charges take up to one third to half of the cost structure of passenger trains. While TAC is highly proportional to distance, open rail market has to compete with point-to-point fares of aviation making cross-border/long-distance trains especially sensitive to TAC level.
- Pilot Applicants experience that TAC level is a key factor in how much capacity they request (frequency, extension to further cities, days of operation) – this is especially

the case when factoring in less transparent TAC markups that are often an entry barrier for new cross-border/long-distance operational models.

It should be noted that while rolling stock availability is not in scope of the of the RNE activities within the passenger pilot, there is a strong correlation between it and capacity management: wherever a pilot applicant already has (at least a contract for) rolling stock, it is observed that timetabling efforts make progress, whereas if there is no available rolling stock, timetabling efforts often fall behind. This indicates a negative spiral as on the other hand, having a viable train path is an important factor at investment in rolling stock.

A number of pilot projects aim to become operational in the timetable of 2026, with others to follow later. The Platform members have expressed support for the pilots and look forward to the results, including the evaluation by RNE. In addition, the Platform noted that it is crucial that the relevant legislation, be fully implemented.

Figure 4. Map of the Commission's passenger pilots

Table 2. Overview of the Commission's passenger pilots

	pilot applicant	**corridor**	type of service	IMs involved
	key capacity management issue within the pilot/success criteria identified			
1	**Hungary Ministry of Transport**	**Vienna-Budapest-Arad/Oradea**	regular day services	ÖBB, MÁV, CFR
	Safeguarding the capacity product established in the Pilot against ad-hoc path requests, TCRs, etc Consulting the market and raising awareness at interested RUs for the path products.			
2a	**SJ**	**Stockholm-Copenhagen-Hamburg-Berlin**	improving existing night service	DB Netz, Banedanmark, Trafikverket
	to have a single path offer in PCS (instead of 3 unharmonized replies by 3 IMs)			
2b	**SJ/DSB/DB**	**Oslo-Malmö-Copenhagen-Hamburg**	new daytime connection(s)	DB Netz, Banedanmark, Trafikverket, Bane NOR
	to realize attractive enough travel times by a fast and stable path offer matching at border points			
2c	**Snälltåget**	**Stockholm-Copenhagen-Hamburg-Berlin**	improving existing night train, new day train	DB Netz, Banedanmark, Trafikverket
	to have a realistic single path offer that is stable with regard to TCRs, with the TCRs properly coordinated			
2d	**CD/DB/DSB**	**Copenhagen-Hamburg-Berlin-Prague**	extending existing regular day trains	Sprava Zeleznic, DB Netz, Banedanmark
	to be able to provide the through connection between Praha and Copenhagen by binding through domestic system paths every day – without TCRs causing domestic system paths to mismatch at the border.			
2e	**Flixtrain**	**Stockholm-Copenhagen-Hamburg-Berlin-Leipzig**	new day train	DB Netz, Banedanmark, Trafikverket
	(pilot put on hold by applicant)			
3	**Flixtrain**	**Munich-Zürich**	new day trains	DB Netz, SBB
	Access to Swiss rail market			
4	**Midnight Trains**	**Paris-Milan-Venice**	new night train	SNCF Réseau, SBB, RFI
	to have a path with a run time less than 14 hours, and being able to offer this product all nights in the year			
5	**WESTbahn**	**Munich-Vienna-Budapest**	new day train(s)	DB Netz, ÖBB, MAV
	(pilot put on hold by applicant)			
6	**Eurostar / NS**	**London-Brussels-Amsterdam**	improved day trains	HS1, Eurotunnel, SNCF Réseau, Infrabel, ProRail
	capacity for 5 train pairs per day with a run time less than 3:45			
7	**European Sleeper**	**Amsterdam-Brussels-Lille-Barcelona**	new night train	ProRail, Infrabel, SNCF Réseau, LFPP, ADIF
	have matching path offer from all IMs with realistic travel times, stable against TCRs			
8	**Trenitalia/DB**	**Munich – Rome/Milan**	new day trains	DB Netz, ÖBB, RFI
	finding fast enough paths for 6h München-Milano and 7:45 München-Rome (with stop in Verona PN)			
9	**iryo**	**Lisbon – Madrid / A Coruna**	new day trains	IP, ADIF
	Availability of fully electrified infrastructure along the route. To be able to access the Portugese rail network with comparable travel times to incumbent operator			
10	**FGC**	**Barcelona – Tolouse/Montpellier**	new day trains	SNCF Réseau, LFPP, ADIF
	to have capacity for 4-4 train pairs for both relations with both with attractive departure times and effective rolling stock utilisation			

Beyond the completion of the TEN-T network, there is important work to support the technical interoperability and operational harmonization within Europe's Rail Joint Undertaking, Here, research and demonstration of technologies to improve network performance is carried out. In addition, in the EU-Rail System Pillar work is carried out to

harmonise the signalling and safety systems and the operational rules and procedures to enable cheaper and smoother national and international traffic.

4.2.2 Governance and capacity allocation

The Platform members are closely following the ongoing exchanges regarding the Regulation on capacity management (proposal COM(2023)443, being discussed in the Council and European Parliament) proposed by the Commission. In general, the member states, as important actors with regard to capacity management strategy, consider the draft Regulation as an important step toward optimal use of the network's capacity.

The Platform members entertained the vision that, with the gradual completion of the TEN-T network, the infrastructure managers' role may slowly evolve from an emphasis on infrastructure development to an emphasis on guaranteeing optimal capacity usage. It was considered that the proposal on capacitymanagement fits within this vision. In light of this, the Platform members expressed their hopes for a speedy agreement on the Regulation on capacity management. Some of the platform members argue against the creation of a lot of new structures and argue that the possibility for delegated acts by the COM should be limited.

The R&I work ongoing at Europe's Rail Joint Undertaking is contributing to the optimal use of the network capacity by developing technical solutions for coordinated planning. Additionally, EU-Rail works as well as for introducing standardised interface technology that allow real-time traffic management (operations and including disruptions) going beyond the regulation and further enabling the mentioned vision of increasing capacity usage for international traffic.

4.2.3 Intermodal connectivity

The Platform considers intermodal connectivity, before and after international rail journeys, as a vital topic. A number of initiatives were discussed, including for rail-air, rail-ferry, and local mobility, all of which are necessary for better rail-based connectivity. Also, innovation actions were discussed, aimed at better integration between modes.

The Platform considered that common data standards also need to work across modes in order to achieve modal shift. Combined ticketing and multiple contracting is still a considerable challenge. Compared to last year already new innovations are shown. These deserve ample attention from the member states and EU institutions alike. However, it was also noted that the MDMS proposal has been postponed. Investments in the main stations should comply with to the new TSI's on infrastructure and TSI on Persons with Reduced Mobility.

4.2.4 Availability of rolling stock

In previous years, the Platform discussed the obstacles for rolling stock projects to mature. Specifically, the members considered that open access projects are disproportionally challenged in this regard as compared to PSO organized projects. The overall large upfront investments required for launching new services often make it difficult for smaller new entrants to arrange for the necessary investment guarantees. An essential issue is that entrants that are not state-owned generally have less favourable credit ratings than the

incumbents, that, on the other hand have to follow procurement laws. This – in combination with the high demand for new rolling stock – results in significantly less favourable financing conditions for rolling stock aquisition. Competetion law does not remedy this situation. In addition, the lack of interoperability of rolling stock impedes the possibility of reusing the rolling stock elsewhere in case of a failed business case, further complicating the matter.

Although the EU mostly heralds the open access principle, the share of open access projects, compared to PSO organized projects, that successfully attained European Investment Bank (EIB) financing is small. The EIB previously emphasized its openness for discussions with new entrants. However, as rolling stock investments run into hundreds of millions, the bank's rules typically require a strong balance sheet or other form of investment guarantee.

Opinions were shared concerning possible implicit, or assumed state guarantees enjoyed by incumbents, even as state aid rules apply. However, established companies generally have a large balance sheet, whereas smaller new entrants sometimes do not. Also, where newcomers compete for PSO contracts and the public transport authority offers guarantees for the lenders, the EIB often carries out project appraisal in cooperation with the contracting authority prior to or during the tendering process, thus making EIB financing available in principle to all the bidders. The Platform once again discussed these considerations, and emphasized that more action could be taken.

4.2.5 Night trains

As the night train market is being revived, it is currently made up of a mixture of commercial and PSO operations and operators. However, all are facing issues related to market access, capacity, availability of rolling stock, certification, and profitably, while the competition is not between Rus but mostly between air and rail. Nevertheless, the quality and number of services are growing: recently new night train rolling stock has been set in service by ÖBB-Personenverkehr AG and new night train services have been launched by European Sleeper.

Specifically, regarding capacity, night trains typically arrive during rush hours, and have specific characteristics (stopping at a limited number of stations, faster than regular trains), making path allocation challenging on the ever more crowded infrastructure. In addition, sleepers require smooth international train paths, unhindered by night track maintenance or customs border stops in the middle of the night. Framework agreements, securing capacity for a long period of time and dedicated night train paths should facilitate the smooth introduction of new services.

Rolling stock is not available for rent, so should be acquired or leased. On the one hand this is an opportunity as new concepts can materialize (such as mini-cabins, capsules or additional comfort), but on the other hand the costs are high and difficult to manage, especially for the smaller private operators. Costs for guarantees are up to 10% of the operator's costs. These costs are especially high considering that the dedicated rolling stock cannot be operated all over Europe due to differing technical specifications and certification per country. Ideally, however, flexibility reduces risks, which reduces guarantee costs.

Operational costs are high, too. Countries such as Belgium put in place mechanisms to compensate the operational costs by reducing track access charges and electricity costs for trains on Belgian territory. Interoperability costs are also striking as multisystem locomotives are not always available, making changes at the border necessary.

PSO contracts could be deployed in order to secure viable business cases, or funding or guarantees for acquiring rolling stock could work as flywheel to start up new services. Finally,

as already noted above, the Platform emphasized that high-quality capacity management and cooperation between Ims (such as regarding train paths and track access charges for night trains) do not solely depend on new legislation.

4.2.6 Regulatory framework and competitiveness of the rail sector

As the Platform noted in previous years, disparities regarding competition between rail and other modes, are striking. Often, air can not only outcompete rail with regard to speed, but also on price. This puts railways in an uphill battle, as framework conditions are not treated equally. The internalization of external costs is not ensured in an equal manner across competing transport modes. Also, aviation is exempt from VAT by all Member States, whereas rail is subject to VAT on cross-border tickets in a number of member states[2]. In addition to considering these conditions, the alignment with the objectives of the Green Deal means that a lower VAT, fuel tax, carbon emission trading and employment condition treatment should be considered for green transport modes.

However, so far these topics are not fully covered within the scope of the IRP. Moreover, as set forth already, a level playing field is not only relevant for competition between rail and other modes, but also in an intramodal sense. All other transport modes have intramodal competition and thus benefit from innovation and customer choice, whereas new entrant operators in rail still only have between 6-8% market share within the mode. Impartial retail, data sharing and through ticketing, in conformity with the FRAND principles, must therefore be achieved with the greatest urgency. In addition, passenger rights, including for end-to-end journeys, are still a subject for considerable improvement.

Another subfield relevant from a regulatory perspective are rail passenger hubs. Here, the regulatory framework was agreed in UN ECE as an Annex to the existing AGC agreement on main international lines. The framework identifies minimum service levels at main passenger hubs and lists the main passenger hubs.

4.3 Conclusions

In addition to ticketing and digitalization, the Platform reaffirmed its focus on a number of critical enablers, including:

- Completing the TEN-T infrastructure network
- Technical interoperability
- Governance and capacity allocation
- Intermodal connectivity
- Availability of rolling stock
- Night trains

[2] With the VAT rates reform that came about with the adoption of Council Directive (EU) 2022/542, Member States have been enabled to apply an exemption with right of deduction (also referred to as a zero rate) to the supply of certain of the goods and services listed in the updated Annex III of the VAT Directive. That includes transport of passengers, as featured in point (5) of the said Annex III while freight transport is not eligible for reduced or zero rate. The use of reduced rates remains optional and it is therefore up to each Member State within the legal framework set by the VAT Directive to decide on the goods or services to which reduced or zero rates are applied. In doing so, Member States must respect the principle of fiscal neutrality, which is inherent in the common system of VAT. According to this principle, which is not affected by the recent reform, similar goods and services, which are in competition with each other, cannot be treated differently for tax purposes.

- Regulatory framework and competitiveness of the rail sector.

As many of these topics are interdependent, the Platform members emphasized it is crucial that progress continues across the board. Moreover, considerable progress is possible within existing legal frameworks. The Platform therefore made the following recommendations:

- There is a need for all Member States, infrastructure managers, safety authorities and sector parties to improve the international network of rail passenger services through the implementation of the existing legal framework.
- Infrastructure managers, assisted by Member States, should allocate high-quality capacity to (new) international passenger services where possible. In the timetable construction process, international passenger trains, especially night trains, should be given priority in assigning slots where possible.
- Intermodal integration, first and foremost in the digital sphere, must be furthered by all parties.
- Financing for rolling stock should be made more accessible, especially for smaller market entrants. Specifically, this topic could be prioritized through the reinforcement of existing financing tools or the next MFF.
- There is a need to harmonize documents that are required by different countries for railway vehicles. Rolling stock cannot be operated all over Europe due to differing technical specifications and certification per country.
- Infrastructure managers, assisted by Member States, should do their utmost to facilitate night trains, helping to ensure viable train paths and infrastructure charging.
- All parties should endeavor to advance intra-modal competition conditions, based on the FRAND principles.

5 Conclusions and recommendations

In this progress report, the IRP laid emphasis on the crucial discussion pertaining to customer experience and digitalisation. In addition, a number of other critical enablers is discussed, and the results of a renewed monitoring exercise are brought forward.

The ongoing development and implementation of common data standards are vital steps that must continue without delay. The Platform considered that for reasons of efficiency, standards should be further developed in complimentary rather than competing fashion. To do so would require a convincing solution for any competition related concerns pertaining to data standards being developed. It should be guaranteed that third parties are provided with full data and fair remuneration on equal terms. Any common standard should enable through ticketing for an optimal customer journey, regardless of the RU.

The Platform considered that ongoing work on the MDMS regulation may come a long way in addressing these requirements. However, it emphasized that the urgency of providing more and better international services dictates that regulatory discussions should not negatively impact the work on technical solutions. In a similar vein, while the continuous exchange within the rail sector focussing on international services is highly important, the multimodal aspects in context of the MDMS discussion should also be duly addressed.

Modal shift towards international railway passenger transportation is crucial. Next to customer experience and digitalization, the Platform therefore considered an array of critical enablers, including:

- Completing the TEN-T infrastructure network
- Technical interoperability
- Governance and capacity allocation
- Intermodal connectivity
- Availability of rolling stock
- Night trains
- Regulatory framework and competitiveness of the rail sector.

The monitoring results showed that during the typical working day, the European Union, Switzerland, Norway and the United Kingdom are now served by some 436 international railway passenger services. Regional cross-border connections total over 150, with an average frequency of 7 to 8 (unidirectional). On top of this, almost 160 direct intercity services are operated, with an average 3 daily trips. High-speed services count a total of 68, on average offering 3 to 4 trains per day. Finally, 59 night train connections are available. Together, these services make up for a total of 1.916 trains per day. Among many origins and destinations throughout Europe, the number of direct connections between capital cities amounts to 35 (these figures were already displayed in the table on page 1 and are further detailed in chapter 6).

International train services currently offer capacity for half a million people per day. Based on 300 operational days per year, the annual capacity of some 150 million passengers can be called significant. With average capacity of some 400 persons per train, especially high-speed services seem to offer large future potential. The total number of connections currently foreseen to be started during the next decade is 67, with long-distance (25) and night trains (16) being the most prominent, followed by regional (13) and high-speed trains (13).

As many of these topics are interdependent, the Platform members emphasized it is crucial that progress continues across the board. Moreover, considerable progress is possible within existing legal frameworks. The Platform therefore made a number of recommendations:

- There is a need for all Member States, infrastructure managers, safety authorities and sector parties to improve the international network of rail passenger services through the implementation of the existing legal framework.
- Infrastructure managers, assisted by Member States, should allocate high-quality capacity to (new) international passenger services where possible. In the timetable construction process, international passenger trains, especially night trains, should be given priority in assigning slots where possible.
- Intermodal integration, first and foremost in the digital sphere, must be furthered by all parties.
- Financing for rolling stock should be made more accessible, especially for smaller market entrants. Specifically, this topic could be prioritized through the reinforcement of existing financing tools or the next MFF.
- There is a need to harmonize documents that are required by different countries for railway vehicles. Rolling stock cannot be operated all over Europe due to differing technical specifications and certification per country.
- Infrastructure managers, assisted by Member States, should do their utmost to facilitate night trains, helping to ensure viable train paths and infrastructure charging.
- All parties should endeavor to advance intra-modal competition conditions, based on the FRAND principles.

6 Monitoring the development of international railway passenger transport

6.1 Introduction

Since the start of the Platform in 2020, progress was made in a number of relevant fields, laying the groundwork with regard to enhanced, concerted efforts by the Member States to contribute to improving international railway passenger transport. In light of this ongoing process, the Member States required a means to estimate the impact of the efforts of the IRP and other stakeholders. In order to allow for an understanding of the development of the market and network, last year's integrated progress report included the initial monitoring results. The present report sets forth the results of the second, expanded, iteration.

As last year, an expert count of European services was carried out at the behest of the IRP's co-chairs. In addition, a detailed survey was spread among the MS and sector parties, allowing us to refine and corroborate the expert count. The results displayed in the following paragraphs therefore provide for an accurate overview. Reiterations and refinement of data collection and presentation over the next years can be expected to provide for even greater reliability, visibility and quality. The overall aim has to be to provide decision makers and interested parties with an overview of existing and growing cross-border services and also enable broad monitoring.

6.2 Methodology

A survey was used for the data collection of the monitoring of international train services. All Member States were asked to fill in a survey where they indicated the different international trains operating in their country. The survey also asked more information on the service, such as the type of service, type of contracting, frequency, and the capacity of the train service. After the collection of the surveys, the data was cleaned by quality checking the entries and the removal of duplications (e.g. Amsterdam-London train was reported by 4 different Member States: Netherlands, Belgium, France and the UK). Train services were, for analytical purposes, only allocated to the origin country and the destination country. Trains going via a certain country are not reflected in the country overviews in this report. Origin and destination of a train services were based on alphabetic order (e.g. Berlin-Paris trains service has Berlin as origin because of working in alphabetic order). After the categorization of the data, several cross-tables between the different parameters were made. The results of the analysis are reflected in the next paragraph. However, data on regional services between Germany and Switzerland could not be obtained in full; therefore, the results on regional services may be regarded as an underestimation.

6.3 Descriptive results

Currently, during the typical working day, the European Union, Switzerland, Norway and the United Kingdom are served by some 436 international railway passenger services. Regional cross-border connections total over 150, with an average frequency of 7 to 8 (unidirectional). On top of this, almost 160 direct intercity services are operated, with an average 3 daily trips. High-speed services count a total of 68, on average offering 3 to 4 trains per day. Finally, 59 night train connections are available. Together, these services

make up for a total of 1.916 trains per day (+164 compared to the results of our more limited monitoring exercise in 2023). Among many origins and destinations throughout Europe, the number of direct connections between capital cities amounts to 35. These key facts are shown in the table below:

Table 3. Key figures 2024 (EU + Norway, UK, Switzerland)

Type of train	*Regional*	*Long-distance*	*High-speed*	*Night train*
Connections Europe	150	159	68	59
Average daily	7,5	3,1	3,6	0,9
Aggregate	1.122	493	246	54
Trains total	**1.916**			
Capital-to-capital connections	**35**			

The table below provides a breakdown of international train connections from various European countries, classified by train type: High Speed (HS), Long distance, Night trains, and Regional[1]. Germany leads with a total of 148 connections, predominantly InterCity and Regional trains. Germany also is home to the largest amount of destinations for night trains (46). Austria operates nearly as many international train services (132) as Germany. Half of Austrian's international trains are long-distance. Poland is listed in the third position with 71 international trains, half of which are half regional trains.

France and Switzerland are major hubs for high-speed trains: more than half of their international services are high speed. Smaller countries like Latvia and Lithuania have minimal connections, with Latvia only having one InterCity connection and Lithuania having two InterCity connections.

Although countries like Belgium and Luxembourg have a medium amount of international train connections, the connections are on average among the most frequent in Europe. Also Denmark and Sweden have very frequent international trains, this can be explained by the frequent Oresund Tag between Copenhagen and Malmö.

Table 4. Number of services per country and frequency

Country	**HS**	**Long distance**	**Night train**	**Regional**	**Total**	
	Connections	**Connections**	**Connections**	**Connections**	**Connections**	**Average Frequency (day)**
Germany	31	53	18	46	**148**	**4,6**
Austria	6	65	13	48	**132**	**3,7**
Poland	0	25	10	36	**71**	**2,4**
Switzerland	34	13	9	10	**66**	**4,4**
France	30	5	3	22	**60**	**7,2**
Czech Republic	1	23	12	23	**59**	**3,4**
Hungary	1	31	10	16	**58**	**3,0**
Italy	3	12	6	16	**37**	**3,2**
Romania	0	14	6	13	**35**	**1,3**
Slovakia	2	14	6	13	**35**	**2,9**

Belgium	10	7	3	7	**27**	**11,5**
Slovenia	0	8	1	12	**21**	**1,5**
Croatia	0	4	8	8	**20**	**1,2**
Netherlands	6	3	5	6	**20**	**7,3**
Luxembourg	3	7	0	4	**14**	**16,7**
Sweden	0	3	3	7	**13**	**8,5**
Denmark	0	3	0	6	**9**	**13,2**
Spain	3	1	0	5	**9**	**5,9**
Norway	0	2	1	3	**6**	**3,0**
United Kingdom	5	1	0	0	**6**	**7,6**
Bulgaria	0	3	0	1	**4**	**1,0**
Lithuania	0	2	0	0	**2**	**1,0**
Portugal	0	1	0	1	**2**	**2,0**
Latvia	0	1	0	0	**1**	**1,0**
Ireland	0	1	0	0	**1**	**8,0**

[1] Side note: countries have interpretated the classification between HS and IC differently

International trains have the capacity to transport half a million people per day. High-speed trains in Europe have on average the highest capacity per train. However, regional trains transfer most passengers per day. The high frequency of regional services enables this type of services to transfer most passengers. Night-trains have on average the lowest capacity. Low capacity on night trains is caused by the relatively large space per passenger (availability of beds).

Table 5. Capacity per type of services

Train type	**Average Capacity**	**Total Capacity per day[3]**
High-speed	396 pax	97.359 pax
Long-distance	271 pax	133.736 pax
Night Train	240 pax	12.820 pax
Regional	246 pax	276.256 pax
Total	**261 pax**	**500.687 pax**

More than two-third of the international rail services in Europe are still Public Service Obligation (69%). However, recent efforts for more competition have resulted in a 27% share for Open Access services.

Table 6. Share PSO/Open Access

Type of contract	**Share (%)**
PSO	69%
Open Access	27%
Hybrid	2%
Other	3%

[3] Estimation (incomplete data)

Table 7 outlines the planned international train connections across several countries. The total number of connections currently foreseen for the next decade is 67, with long-distance trains (25) and night trains (16) being the most prominent, followed by regional (13) and high-speed trains (13). Croatia is the main contributor with 16 new international train services. Important note is that most of these Croatian services are in a conceptual stage. Croatia is closely followed by Denmark (14 planned trains, that wants to benefit from a new tunnel between Denmark and Germany). With 9 new international services, the Netherlands will significantly increase their number of international trains in the coming years.

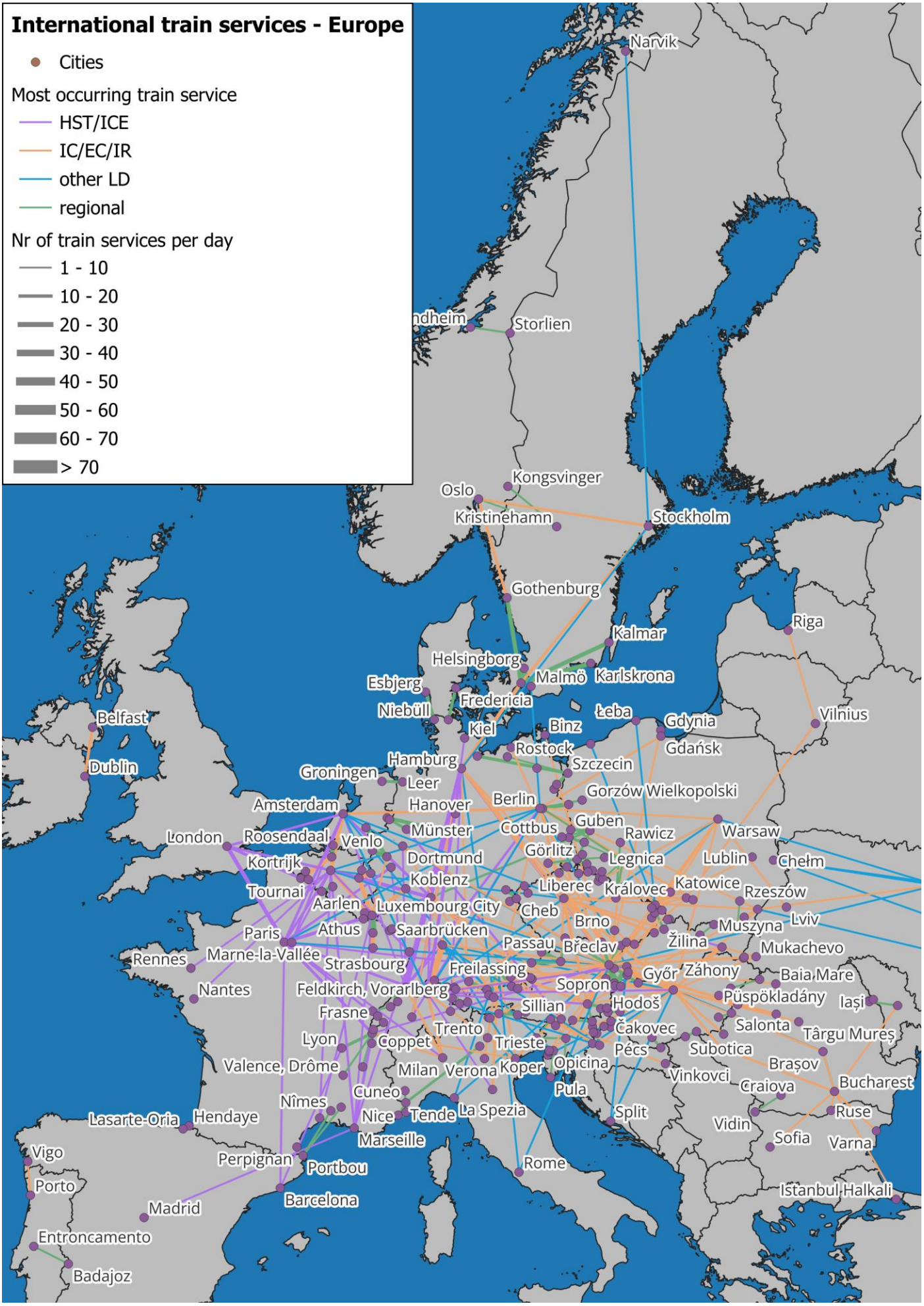
Table 7. Future rail services

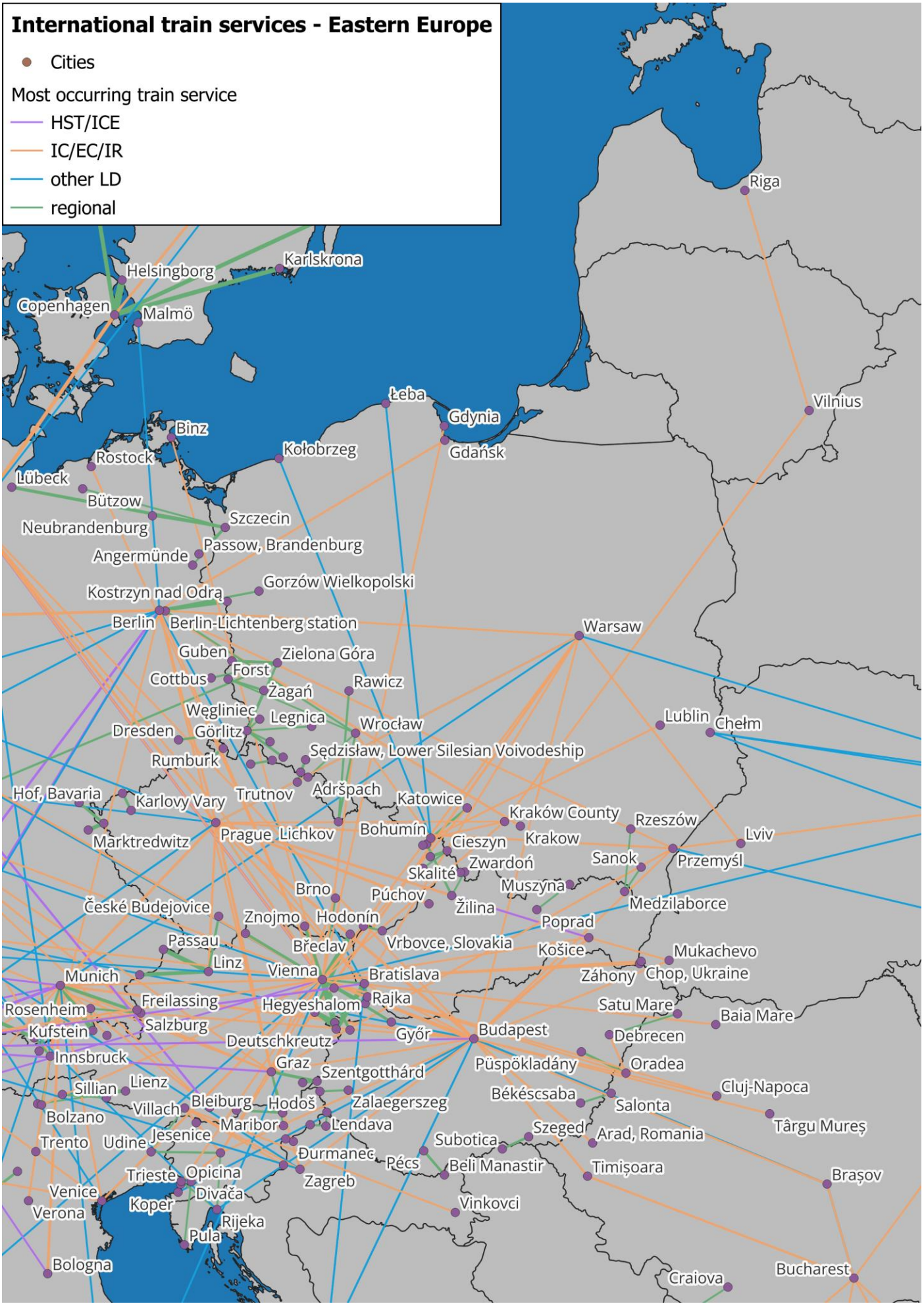
Year/Country	HS	IC	Night train	Regional	Total
2024	**2**	**4**	**1**		**7**
Czech Republic		1	1		2
Denmark		1			1
France	2				2
Latvia		1			1
Netherlands		1			1
2025	**2**	**4**	**4**		**10**
Belgium			1		1
Denmark		1			1
France	1				1
Netherlands	1	1	1		3
Norway		1	1		2
Poland		1			1
Portugal			1		1
2026		**3**	**2**		**5**
Belgium			1		1
Denmark		1			
Lithuania		1			1
Netherlands		1	1		2
2027		**2**			**2**
Denmark		2			2
2028	**3**	**1**	**3**		**7**
Belgium			1		1
Denmark		1			1
France	3				3
Netherlands			2		2
2029		**7**	2	1	**10**
Denmark		5	2	1	8
Portugal		2			2
TBD	**6**	**4**	**4**	**12**	**26**
Croatia		1	4	11	16
Finland		1			1

Germany	4				4
Italy	2				2
Luxembourg		2			2
Netherlands				1	1
Total	13	25	16	13	67

6.4 Mapping of international rail passenger connections

The train services have been visualized on several maps of Europe as displayed below. The first map shows an overview of Europe with the major cities, subsequent maps each zoom in on a particular part of the continent, and show all cities that occur in the data, either as an origin or a destination. For each train service, a line is drawn as the crow flies between the origin and destination, coloured according to the train type that occurs most often on that OD-pair. The width of the line varies with the total number of trains per day (across all train types).


International train services - Europe
Cities
Most occurring train service
HST/ICE
IC/EC/IR
other LD
regional
Nr of train services per day
1 - 10
10 - 20
20 - 30
30 - 40
40 - 50
50 - 60
60 - 70
> 70
Narvik
Storlien
Kongsvinger
Oslo
Kristinehamn
Stockholm
Gothenburg
Kalmar
Riga
Helsingborg
Malmö
Karlskrona
Esbjerg
Fredericia
Niebüll
Kiel
Łeba
Gdynia
Vilnius
Belfast
Binz
Rostock
Gdańsk
Dublin
Hamburg
Szczecin
Groningen
Leer
Gorzów Wielkopolski
Amsterdam
Hanover
Berlin
Guben
Cottbus
Rawicz
Warsaw
London
Roosendaal
Venlo
Münster
Görlitz
Legnica
Lublin
Chełm
Kortrijk
Dortmund
Koblenz
Liberec
Královec
Katowice
Rzeszów
Tournai
Aarlen
Luxembourg City
Cheb
Brno
Muszyna
Lviv
Paris
Athus
Saarbrücken
Passau
Břeclav
Žilina
Mukachevo
Rennes
Marne-la-Vallée
Strasbourg
Freilassing
Győr
Záhony
Baia Mare
Nantes
Feldkirch, Vorarlberg
Sopron
Hodoš
Püspökladány
Iași
Frasne
Sillian
Čakovec
Salonta
Târgu Mureș
Trento
Lyon
Coppet
Trieste
Pécs
Subotica
Valence, Drôme
Milan
Verona
Koper
Opicina
Vinkovci
Brașov
Cuneo
Pula
Craiova
Bucharest
Nîmes
Lasarte-Oria
Hendaye
Nice
Tende
La Spezia
Split
Ruse
Vidin
Marseille
Sofia
Varna
Vigo
Perpignan
Portbou
Rome
Porto
Barcelona
Istanbul Halkali
Madrid
Entroncamento
Badajoz


International train services - Eastern Europe
Cities
Most occurring train service
HST/ICE
IC/EC/IR
other LD
regional
Riga
Karlskrona
Helsingborg
Copenhagen
Malmö
Łeba
Gdynia
Vilnius
Binz
Kołobrzeg
Gdańsk
Rostock
Lübeck
Bützow
Szczecin
Neubrandenburg
Passow, Brandenburg
Angermünde
Gorzów Wielkopolski
Kostrzyn nad Odrą
Berlin
Berlin-Lichtenberg station
Warsaw
Guben
Zielona Góra
Forst
Cottbus
Rawicz
Żagań
Węgliniec
Legnica
Wrocław
Lublin
Chełm
Dresden
Görlitz
Sędzisław, Lower Silesian Voivodeship
Rumburk
Hof, Bavaria
Karlovy Vary
Trutnov
Adršpach
Katowice
Kraków County
Rzeszów
Lviv
Marktredwitz
Prague
Lichkov
Bohumín
Cieszyn
Krakow
Sanok
Przemyśl
Zwardoń
Skalité
Muszyna
Brno
Púchov
Žilina
Medzilaborce
České Budejovice
Znojmo
Hodonín
Poprad
Passau
Břeclav
Vrbovce, Slovakia
Košice
Mukachevo
Linz
Vienna
Bratislava
Záhony
Chop, Ukraine
Munich
Freilassing
Hegyeshalom
Rajka
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Baia Mare
Rosenheim
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Kufstein
Deutschkreutz
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Püspökladány
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Békéscsaba
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Đurmanec
Subotica
Pécs
Beli Manastir
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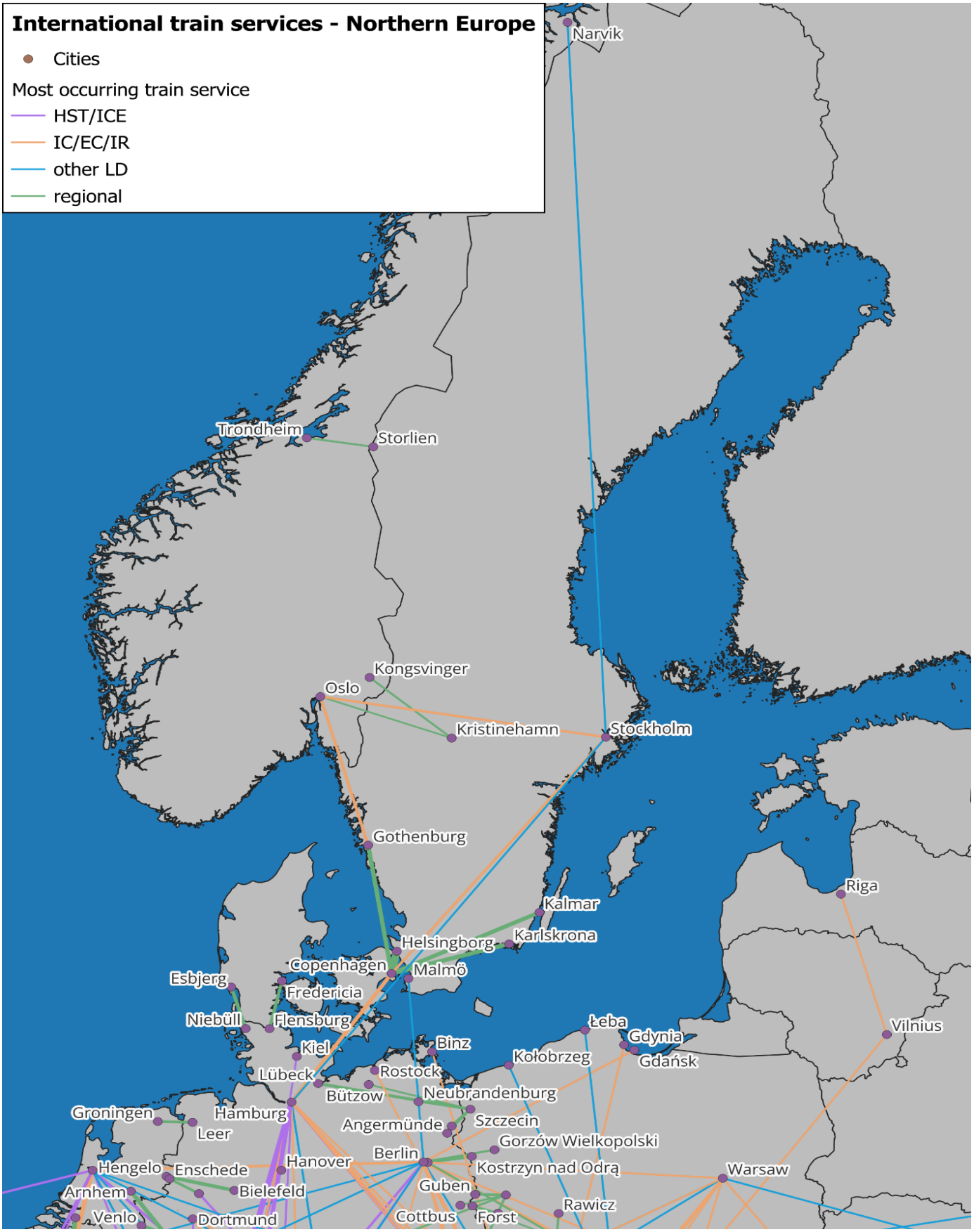
Bucharest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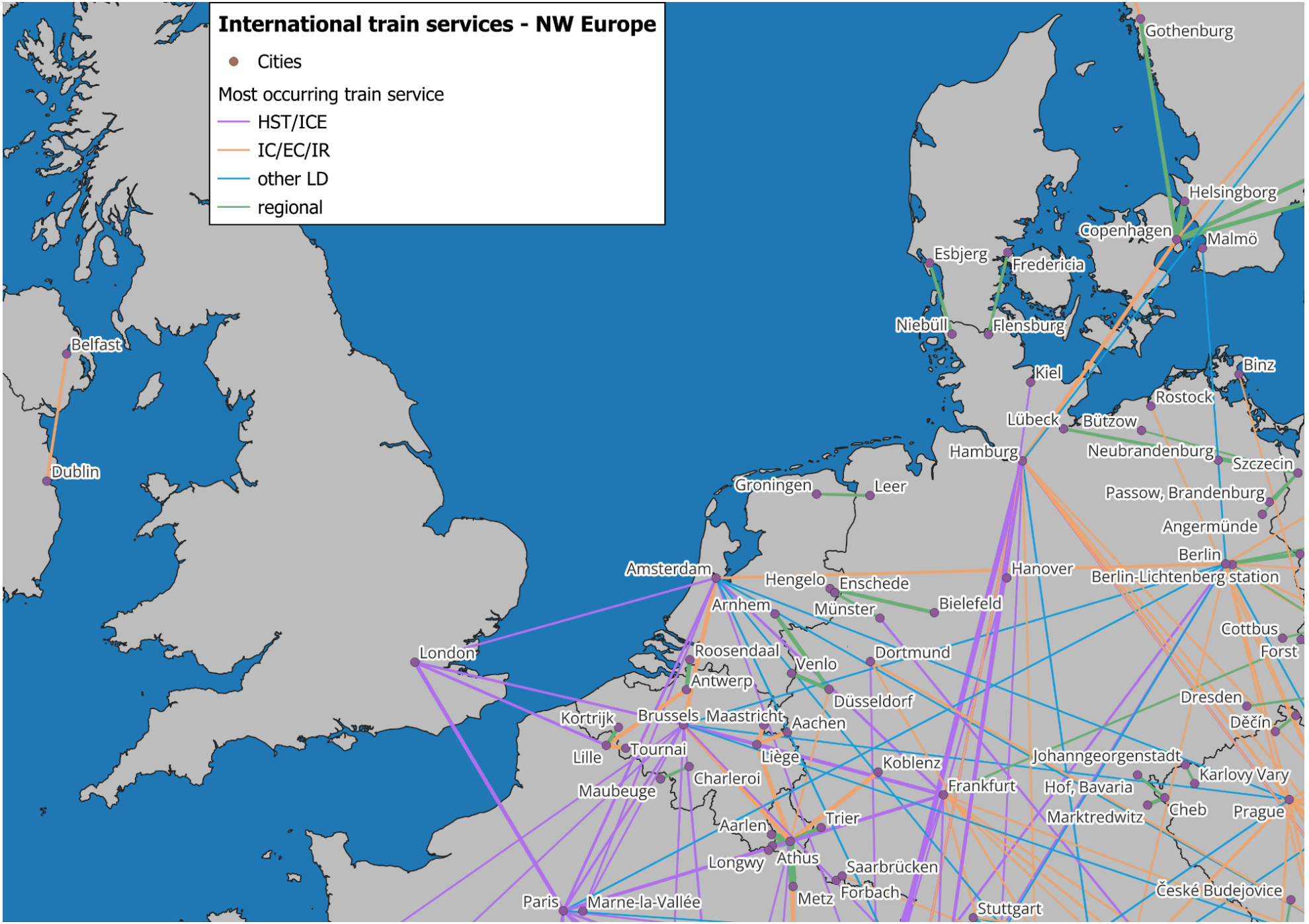
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Most occurring train service
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IC/EC/IR
other LD
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Charleroi
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Hof, Bavaria
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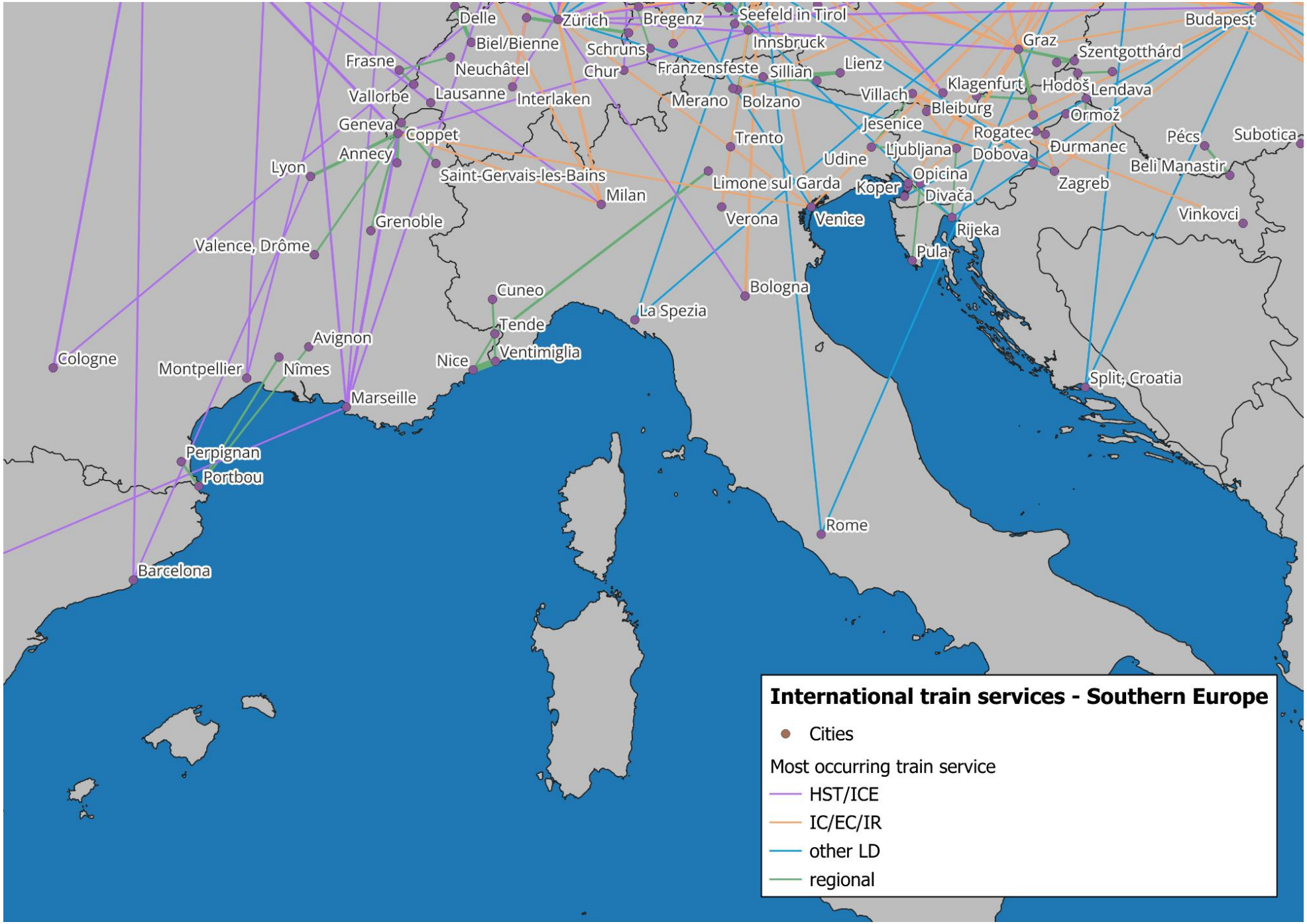
Stuttgart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Chur
Franzensfeste
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Saint-Gervais-les-Bains
Opicina
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Koper
Zagreb
Milan
Divača
Verona
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Grenoble
Rijeka
Valence, Drôme
Pula
Cuneo
Bologna
La Spezia
Tende
Avignon
Cologne
Ventimiglia
Montpellier
Nîmes
Nice
Split, Croatia
Marseille
Perpignan
Portbou
Rome
Barcelona
International train services - Southern Europe
Cities
Most occurring train service
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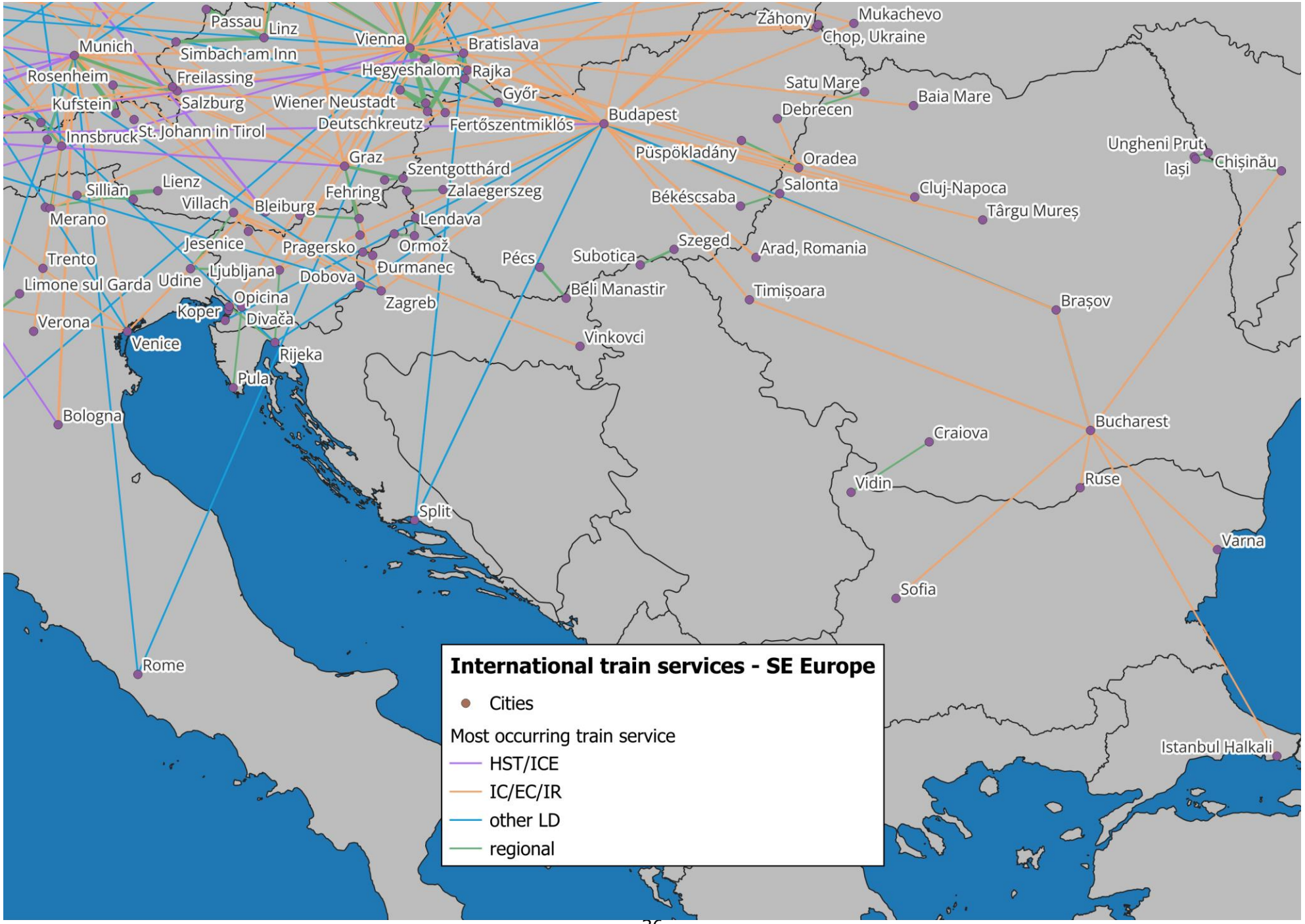
IC/EC/IR
other LD
regional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Győr
Deutschkreutz
Fertőszentmiklós
Budapest
Innsbruck
St. Johann in Tirol
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Fehring
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Jesenice
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Limone sul Garda
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Chop, Ukraine
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Ungheni Prut
Iași
Chișinău
Salonta
Cluj-Napoca
Békéscsaba
Târgu Mureș
Szeged
Arad, Romania
Subotica
Béli Manastir
Timișoara
Brașov
Vinkovci
Craiova
Bucharest
Vidin
Ruse
Varna
Sofia
Istanbul Halkali
International train services - SE Europe
Cities
Most occurring train service
HST/ICE
IC/EC/IR
other LD
regional

Annex 1 – Sector Mirror Group

The CER Ticketing Roadmap ("Roadmap") continues to be a key vehicle for the CER railways to improve the cross-European passenger experience by 2025 and 2030, respectively. It establishes concrete actions to further improve the experience of rail passengers in the Single European Railway Area. Roadmap delivery is largely on track, both regarding multilateral solution development and implementation by the railways individually. Since last year report we have GYSEV, HŽPP and PKP Intercity joining the CIT Agreement on Journey Continuation with Eurostar and LTG Link joining by the end of 2024. This expansion ensures that the AJC will now encompass over 90% of CER members' passenger traffic in the EU. CIT and EPF have together also drafted a leaflet on how passenger can use the agreement. OSDM deployment preparations have now reached final stages and we will have 6 RUs switching to OSDM by end of 2024 with additional 7 by middle of 2025. The implementation shows once again the dependence on third parties such as infrastructure managers and member states exists for some of the less mature Roadmap actions. The extension of booking horizons and the harmonisation of ticket conditions are particularly dependent on alignment with third parties. With work on the 10 Commission Pilot Projects shows that most of the applicants called capacity, path quality and allocation process among the most challenging issues related to an international train service.

(Text issued by CER)

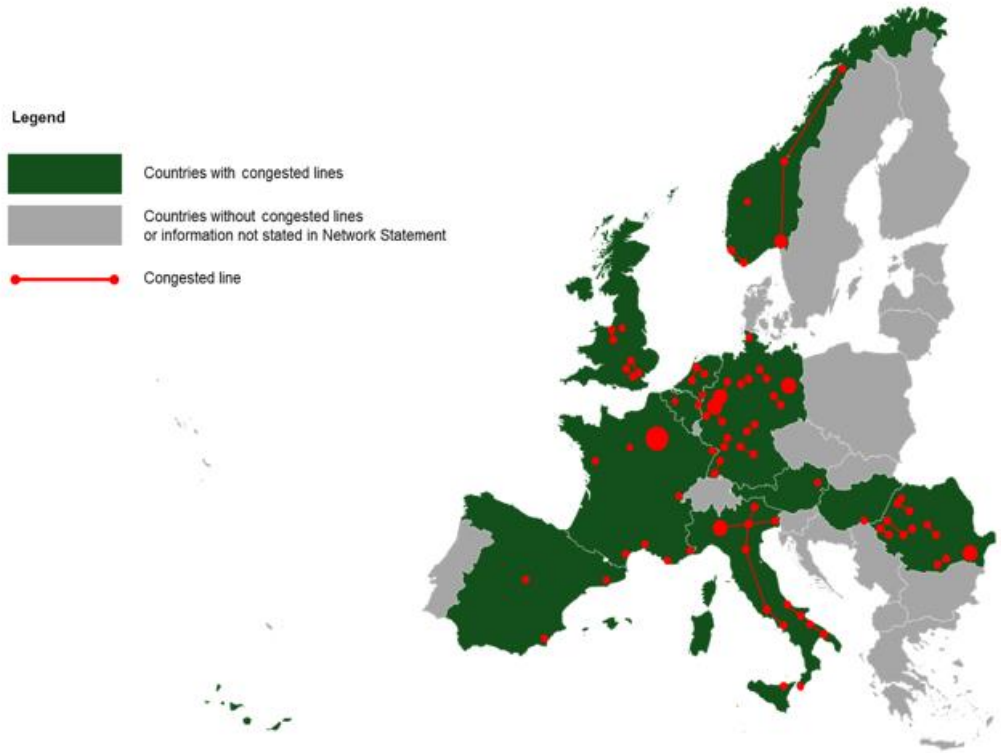

Figure 1 – Map of Congested lines, based on available network statement

Annex 2 – Survey results

The survey results may be shared as separate annex.