



CONFERENCE
2026
MAASTRICHT

WELCOME

#EPFCONFERENCE2026

Connecting Europeans

epfconference.eu



CONFERENCE
2026
MAASTRICHT

MODERATOR: MARC MAARTENS



epfconference.eu



Welcome to the Gouvernement!

EPF'26 conference Maastricht

provincie
Limburg





CONFERENCE
2026
Maastricht

OPENING AND INTERVIEW WITH JASPER KUNTZELAERS

DEPUTY FOR CULTURE AND HERITAGE, MOBILITY,
AND AGRICULTURE AT THE PROVINCE OF
LIMBURG



epfconference.eu



Cross-border mobility is our everyday reality. In this region, people cross borders daily for work, education and family life. Limburg offers an example of how mobility can support people's daily lives.



CONFERENCE
2026
MAASTRICHT

KEYNOTE BY OANA GHERGHINESCU

EXECUTIVE DIRECTOR OF THE EUROPEAN UNION
AGENCY FOR RAILWAYS (ERA)



epfconference.eu



CONFERENCE
2026
MAASTRICHT

KEYNOTE BY WINO AARNINK

DIRECTOR OF PUBLIC TRANSPORT AND RAIL AT
THE DUTCH MINISTRY OF INFRASTRUCTURE AND
WATER MANAGEMENT



epfconference.eu



CONFERENCE
2026
MAASTRICHT



10:30-
11:00 AM

COFFEE BREAK

#EPFCONFERENCE2026

Connecting Europeans

epfconference.eu



CONFERENCE
2026
MAASTRICHT

PUBLIC TRANSPORT ON THE LOCAL AND REGIONAL LEVEL

epfconference.eu



CONFERENCE
2026
MAASTRICHT

KEYNOTE BY HENK SWARTTOUW

PRESIDENT OF THE EUROPEAN CYCLISTS'
FEDERATION (ECF)



*"The European Cyclists' Federation works
for MORE AND BETTER CYCLING FOR ALL."*

epfconference.eu



**CONFERENCE
2026
MAASTRICHT**

Henk Swarttouw

President of the European Cyclists' Federation



ECF gratefully acknowledges financial support from the LIFE Programme of the European Union



ECF gratefully acknowledges financial support from the cycling industry via Cycling Industries Europe

www.ecf.com

1968 – my first bike



ECF gratefully acknowledges financial support from the LIFE Programme of the European Union



www.ecf.com

I ambassadörskåren vänder Henk Swarttouw många huvuden när han anländer till möten med den holländska ambassadens officiella transportmedel – en cykel av trä.

HELSINGFORS – Det är inget problem för mig. Som holländare är jag mer eller mindre född på en cykel, säger ambassadör Henk Swarttouw.

På gatan nedanför ambassadörens arbetsrum i Helsingfors står hans cykel parkerad. Det händer ofta att förbipasserande tar en bild på den. Det är inte vilken cykel som helst. På holländska ambassaden kör man med cyklar gjorda av trä. Två stycken finns till personals förfogande.

Cyklarna heter Bough Bikes. "Bough" betyder ungefär tjock gren på engelska. Cyklarna som tillverkas i Staphorst nordost om Amsterdam är gjorda av fransk ek.

För en Bough Bike får man betala 1 500 euro och uppåt. Man bestämmer själv i hurdant utförande man vill ha den. Den dyraste varianten har elmotor. Ambassadens cyklar har två växlar som slår in automatiskt beroende på motståndet.

– Cykeln är ganska tung men tyngdpunkten ligger lågt så det är bekvämt att cykla, säger Swarttouw när han gör en demonstrationsrunda i Esplanadparken.

Just då är det ingen som reagerar märkbart men normalt händer det rätt ofta.

– Finländare är vanligtvis ganska tysta. Men när jag cyklar med den här kan jag bli tilltalad av vilt frammande personer.

I nästan alla väder

Henk Swarttouw har varit ambassadör i Finland i snart tre år. Hans residens är vid Brunnsparcken och ambassaden i hörnet av Skillnadsgatan och Södra esplanaden. På Hollands ambassad i Helsingfors anser man att svarta representationsbilar är passé. Cyklar är dagens melodi.

– Jag cyklar till och från jobbet, via bagaren ibland. Men också till möten i centrum, som till Utrikes-

ministeriet, riksbanken och riksdagen. Förutom när det regnar eller slaskar. Snö är okej.

Helsingfors har blivit en bättre cykelstad, cykelleden Banan i det gamla järnvägsschaktet är ett bra exempel. Men Swarttouw vet att många tycker att det är svårt att veta var man ska cykla. Speciellt i innerstaden finns många besvärliga ställen. – Ibland är cykelbanan på ena sidan och ibland på andra. Ibland ska man cykla på trottoaren och ibland på gatan. Det är otydligt. Men det är inte helt lätt att åtgärda i en gammal stadskärna.

Swarttouw tycker ändå man kan skönja ett visst uppvaknande när det gäller cykelkultur överlag i Finland. Han nämner som exempel det faktum att cyklistaktiviteter i Helsingfors har börjat ordna det världsomfattande cykelevenemanget Critical mass och att staden anställt en cyklingsskordinator, Reetta Keisänen, som ska jobba för att cykelresornas andel i staden ska öka till 15 procent fram till år 2020.

Inte bara sport eller nöje

Men det finns mycket kvar att göra och där kan ambassaden hjälpa till. I samarbete med organisationen The Dutch Cycling Embassy ordnar man exempelvis Thinkbike-verkstäder där konsulter kallas in för att hjälpa

städer i andra länder att tänka cykelvänligt när infrastruktur planeras.

– I Holland finns både kunskap och erfarenhet som städer som bland annat Helsingfors, Tammerfors, Joensuu och Jyväskylä har dragit eller kommer att dra nytta av.

Swarttouw tycker att det framför allt krävs en attitydförändring i Finland.

– Cykling är inte enbart sport och nöje. Cykeln är ett ur miljösynpunkt hållbart fortkraftningsmedel.

Nere på Skillnadsgatan står Bough Biken ordentligt fastlåst i cykelstället och väntar på att ambassadörens arbetsdag tar slut. Förutom att många fotograferar cykeln har den fått vara ganska i fred. Som vilket annat träföremål som helst präglas ytan av omständigheterna. Ändå tycker ambassadören att cykeln är relativt underhållsfr.

– Den kräver ungefär samma underhåll som trädgårdsmöbler. Man måste olja den. Vanligtvis reparerar vi holländare våra cyklar själva. Men oljandet har vår vaktmästare faktiskt skött, säger ambassadör Swarttouw nästan en aning generat.

TEXT KRISTOFFER NOJD
kristoffer.nojd@kvsfmedia.fi

FOTO CATA PORTIN
cata.portin@kvsfmedia.fi

Bilinvasjon och oljekris satte Holland på cykel

Det är klart det är kul att cykla i ett land som är platt, tätt befolkat och avstånden är korta. Men det förklarar inte allt om Hollands väg till cykeletta.

Holland har flest cyklister i världen och sägs vara det säkraste landet att cykla i tack vare den utvecklade infrastrukturen.

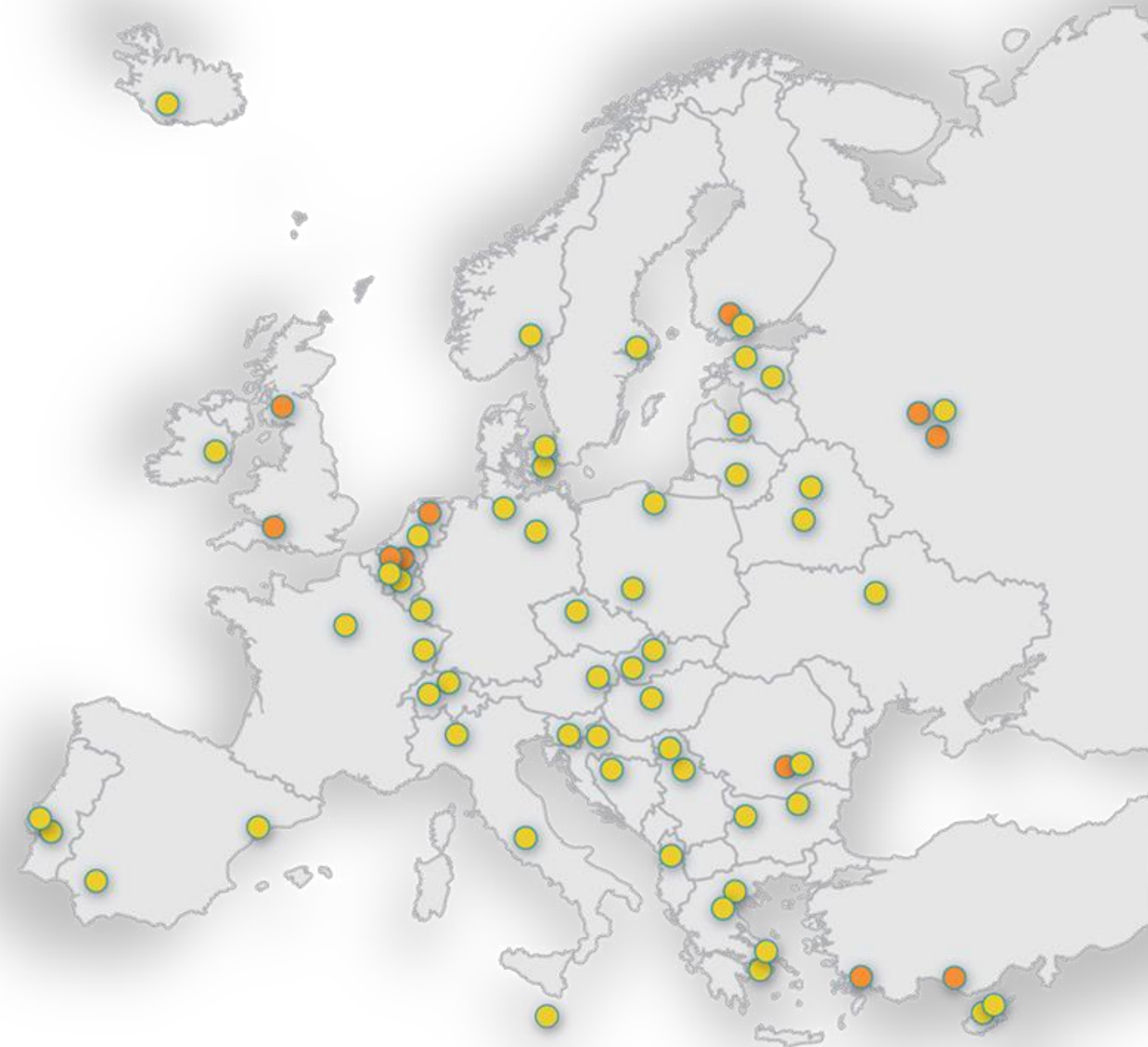
– I dag cyklar lika många holländare som på 1920-talet, säger ambassadör Henk Swarttouw.

myndigheterna ut med en uppmaning till medborgarna att de måste ändra sina vanor. Initiativ som främjade cyklismen passade perfekt i detta sammanhang. I mitten av 1970-talet började man experimentera med statligt finansierade kompletta och trygga cykelleder. I bland annat Haag där detta genomfördes, ökade cyklingen på de nya lederna med till och med 60 procent på några år. Det här betraktas som starten på Hollands moderna cykelpolitik.



Who we are

- 70+ members
- 40+ countries
- Civil society organisations, HQ in Brussels, staff: ~35 FTE
- Budget: ~ € 2.5 – 3.0 million



Our Mission: More and better cycling for all, why?



- ✓ Cleaner air
- ✓ Fewer road deaths and serious injuries
- ✓ Healthier, happier citizens
- ✓ More liveable cities and towns
- ✓ Better rural connectivity
- ✓ Greener leisure and tourism options
- ✓ More vibrant local economies
- ✓ More inclusive societies

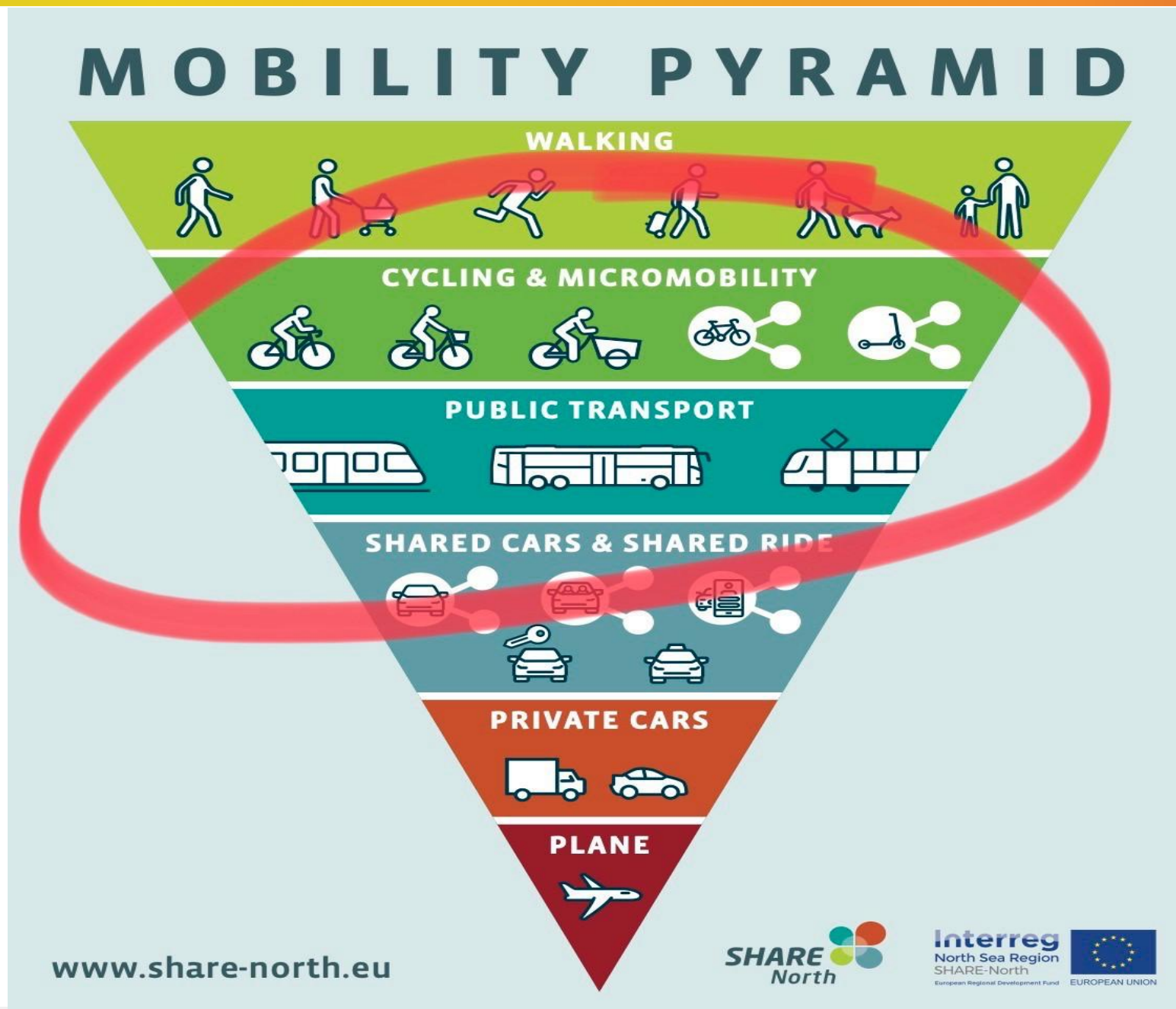
What we do

- International advocacy
- International projects
- Velo-city conference
- EuroVelo network
- Knowledge centre
- Networks:
 - Cities and Regions for Cyclists
 - Cycle Friendly Employers
 - Scientists for Cycling
 - World Cycling Alliance



The European Declaration on Cycling

The Mobility Pyramid





Public Transport

- + Speed
- + Distance
- + Comfort



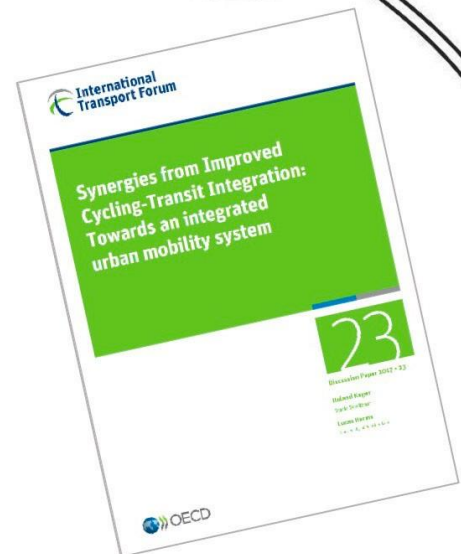
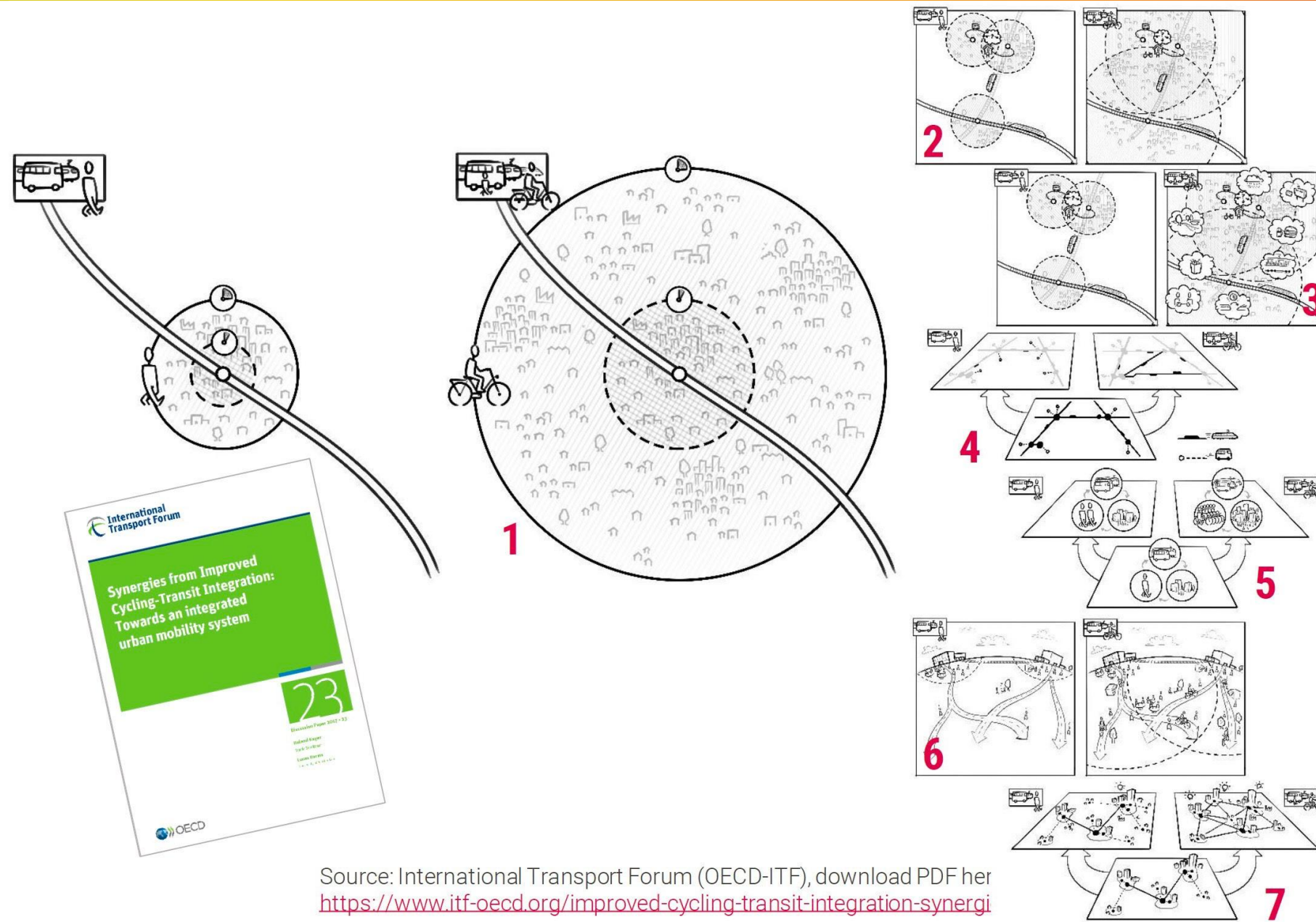
Bikes:

- + Door-to-door
- + Healthy
- + Flexible

Train + Bike: a winning combination!

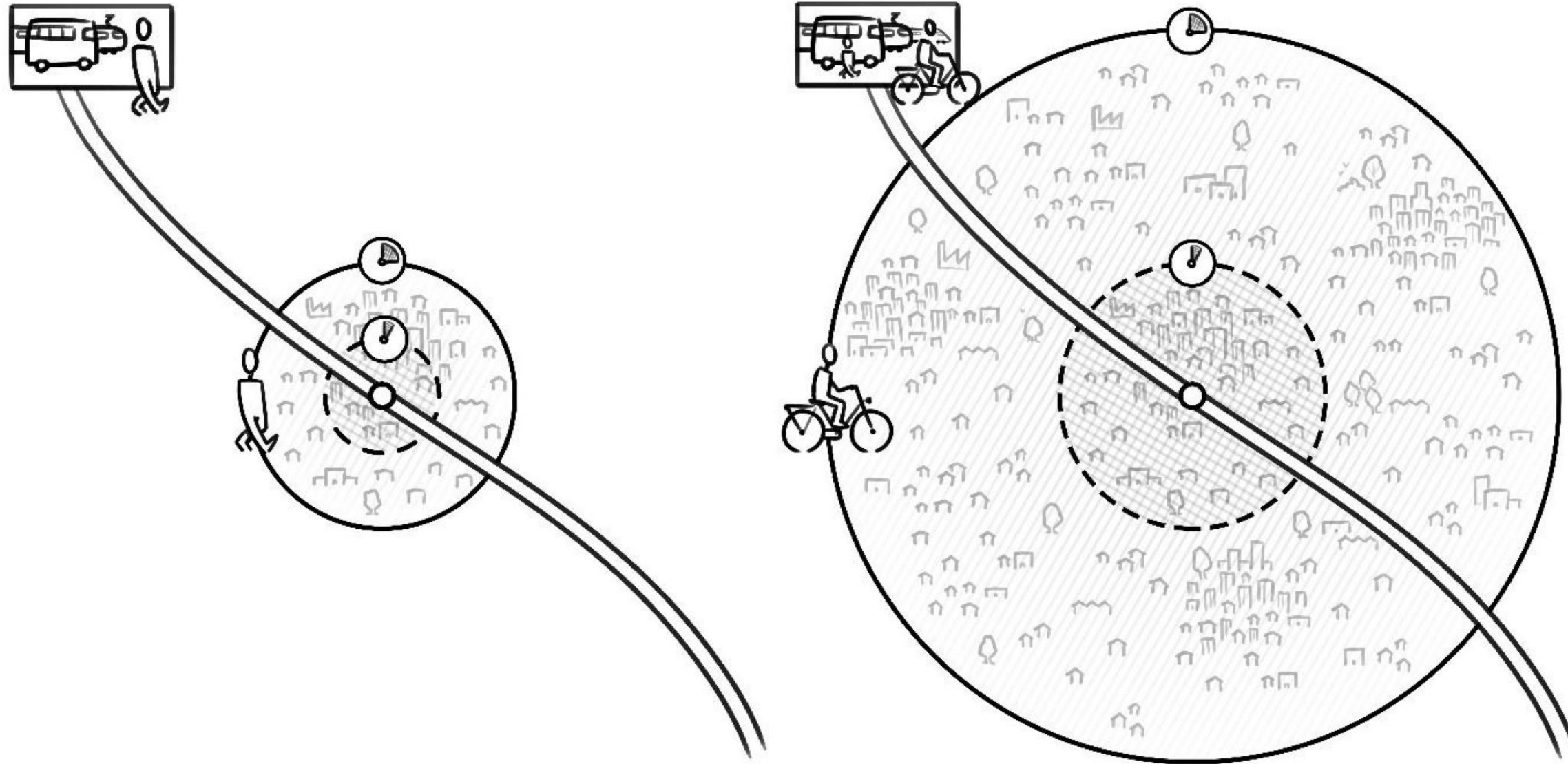


ITF: Improved Cycling-Transit Integration (2017)



Source: International Transport Forum (OECD-ITF), download PDF her <https://www.itf-oecd.org/improved-cycling-transit-integration-synergi>

Catchment Areas: 9 times bigger!



The “Danish” model



The “Dutch” model



The Danish model: bikes on trains



- From 2025
- Dedicated space for bikes
- At least 4 spaces on each train(set)
- Can be more if there is demand
- This is not enough!



A sad story of unrequited love

Cyclists



Trains



NO BIKES

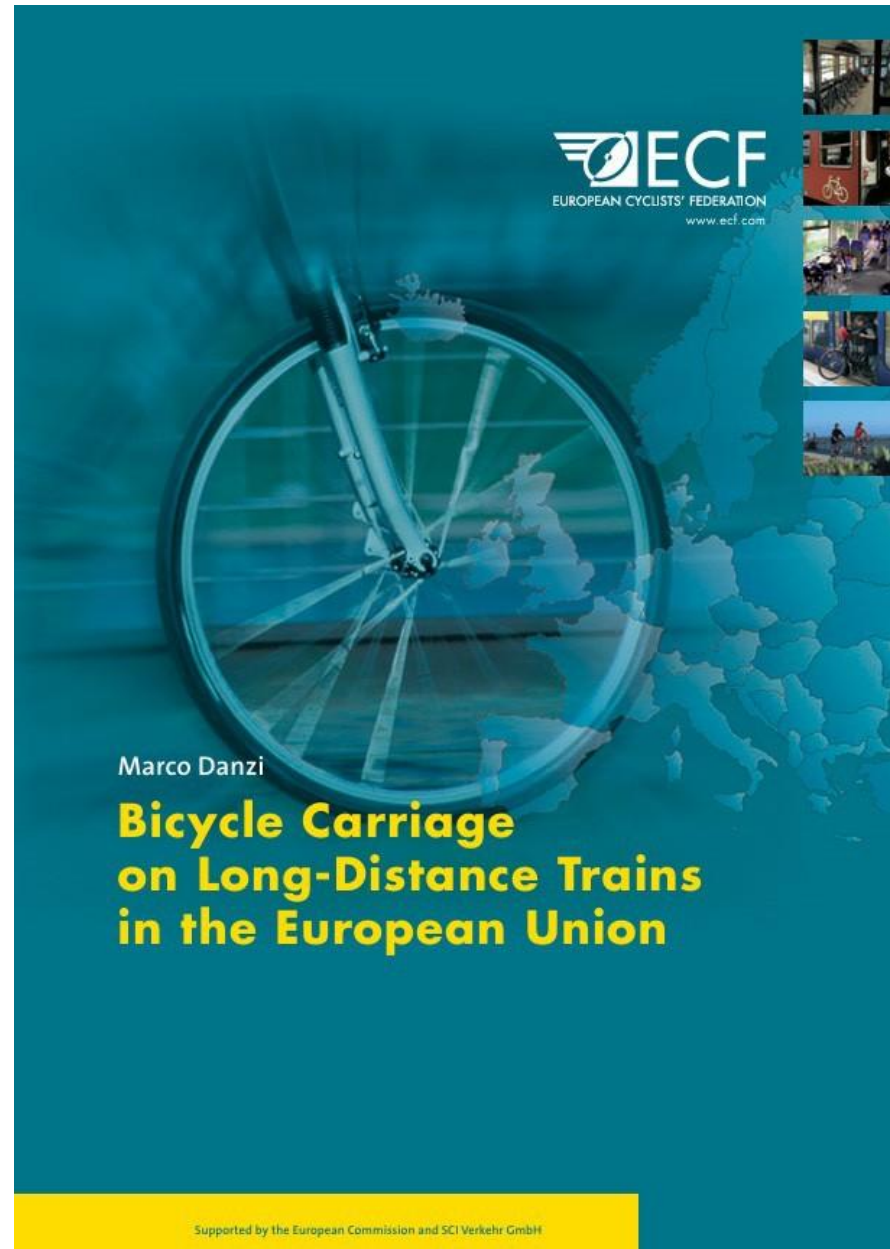
but...

Trains



Cyclists



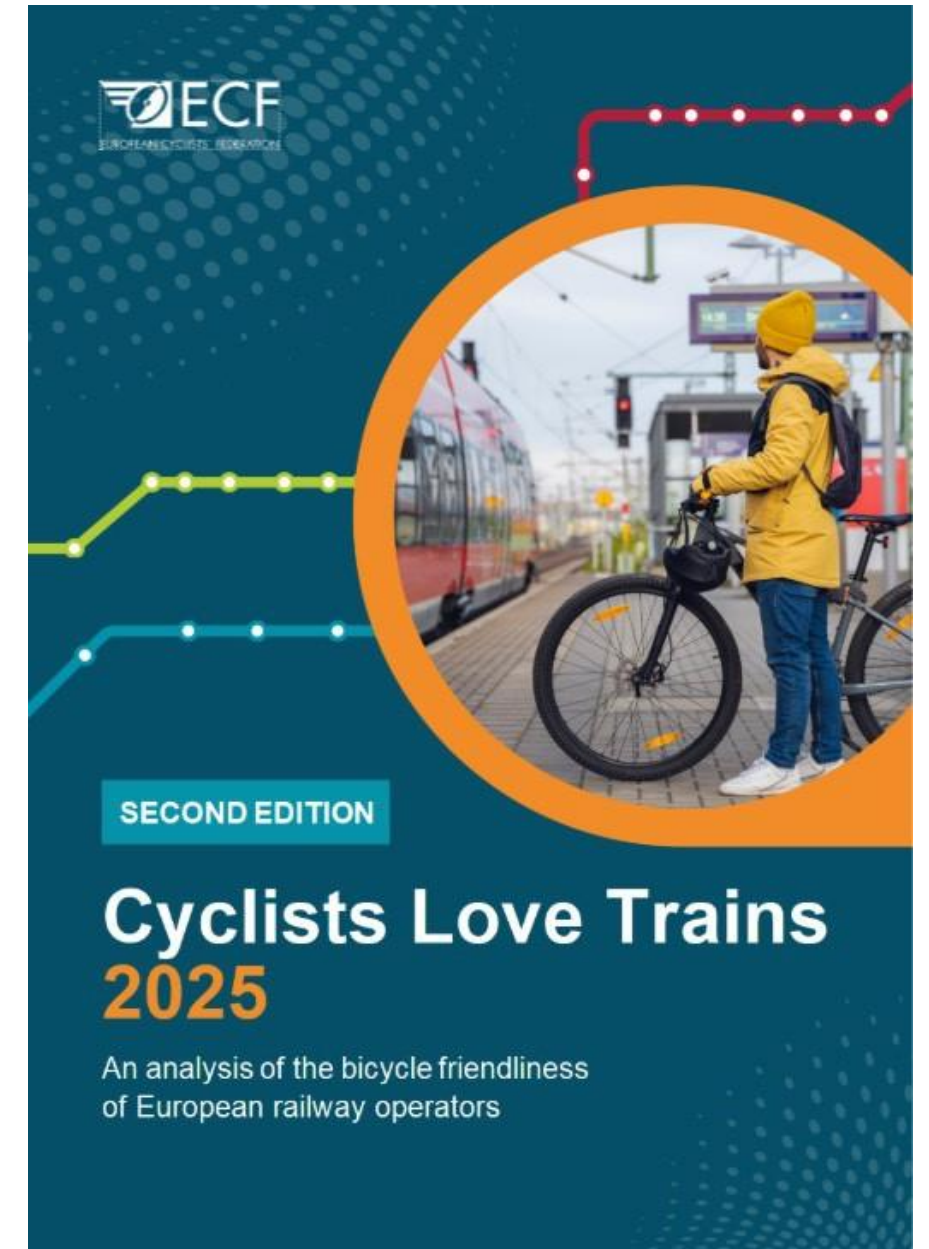


CYCLISTS LOVE TRAINS

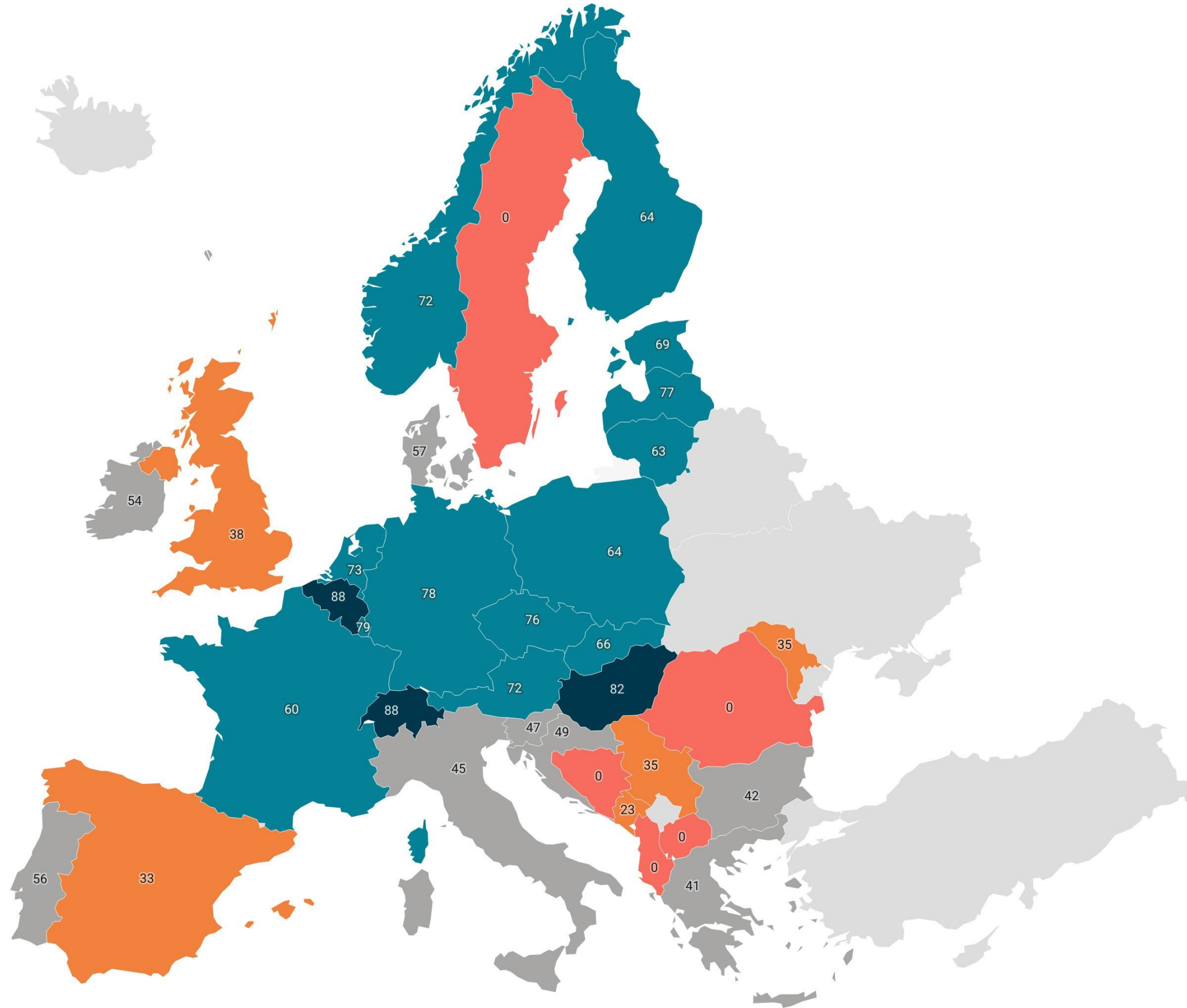
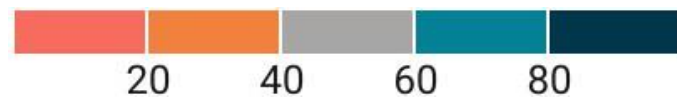
An analysis of the bicycle friendliness of European railway operators



European Cyclists' Federation
www.ecf.com



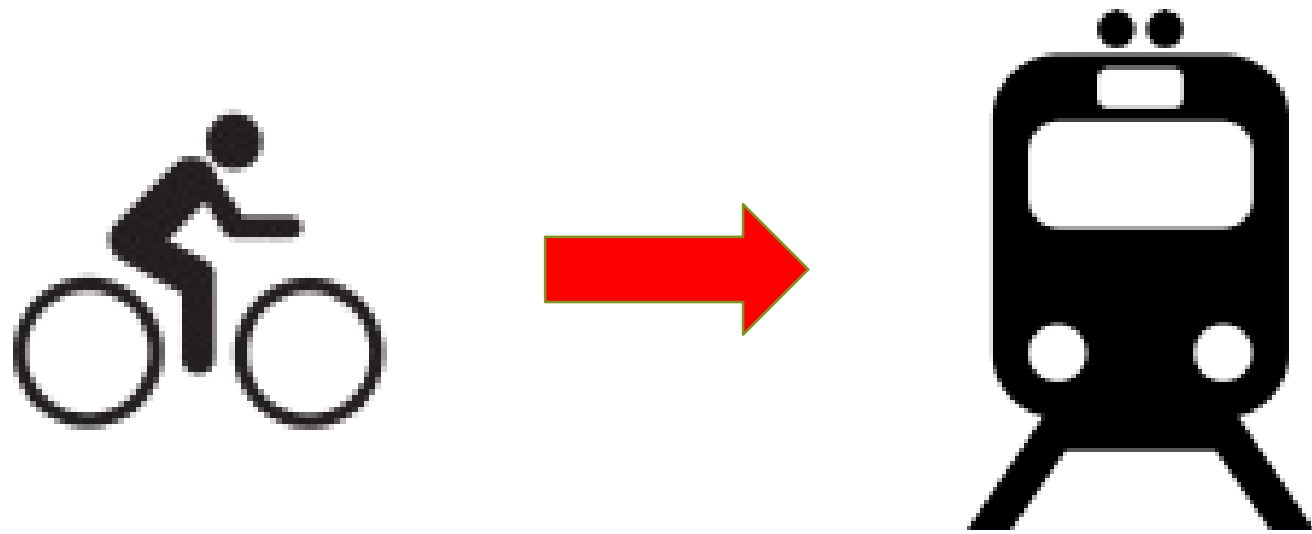
2025 Scores (only national operators)



The "Dutch" model: Bike Parking + Bikeshare

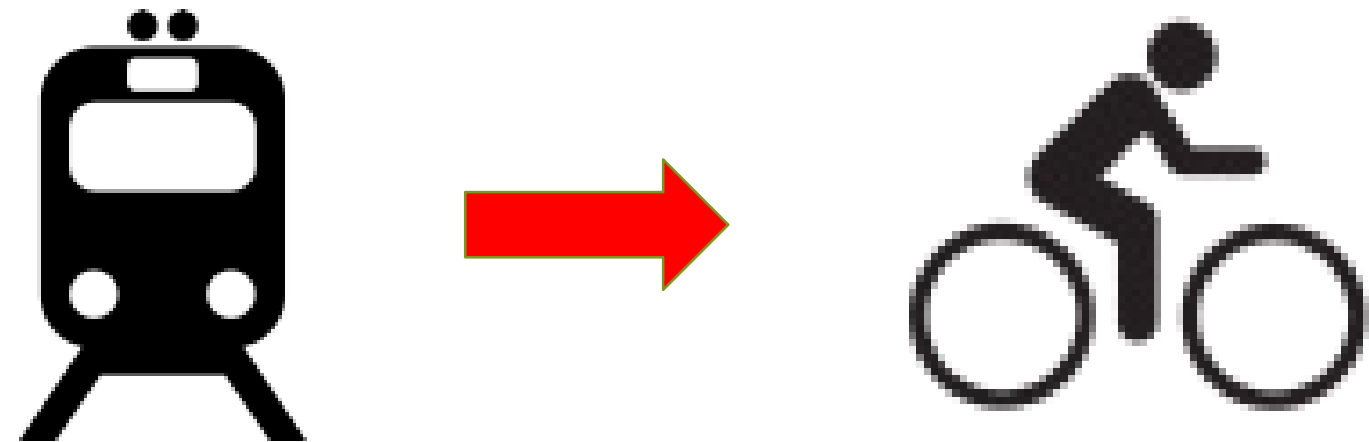


The “Treinfietser”: Train Cyclist



“Cycling **increases the catchment area of stations**, with limited impact on the speed of travel”

“(Long distance) transit **increases the reach of the bike**, with limited impact on the flexibility / freedom of travel”



Bikes on Trains

- + Ideal for **tourists**
- + Passengers use their own bike
- + Easy to manage
- + Additional income

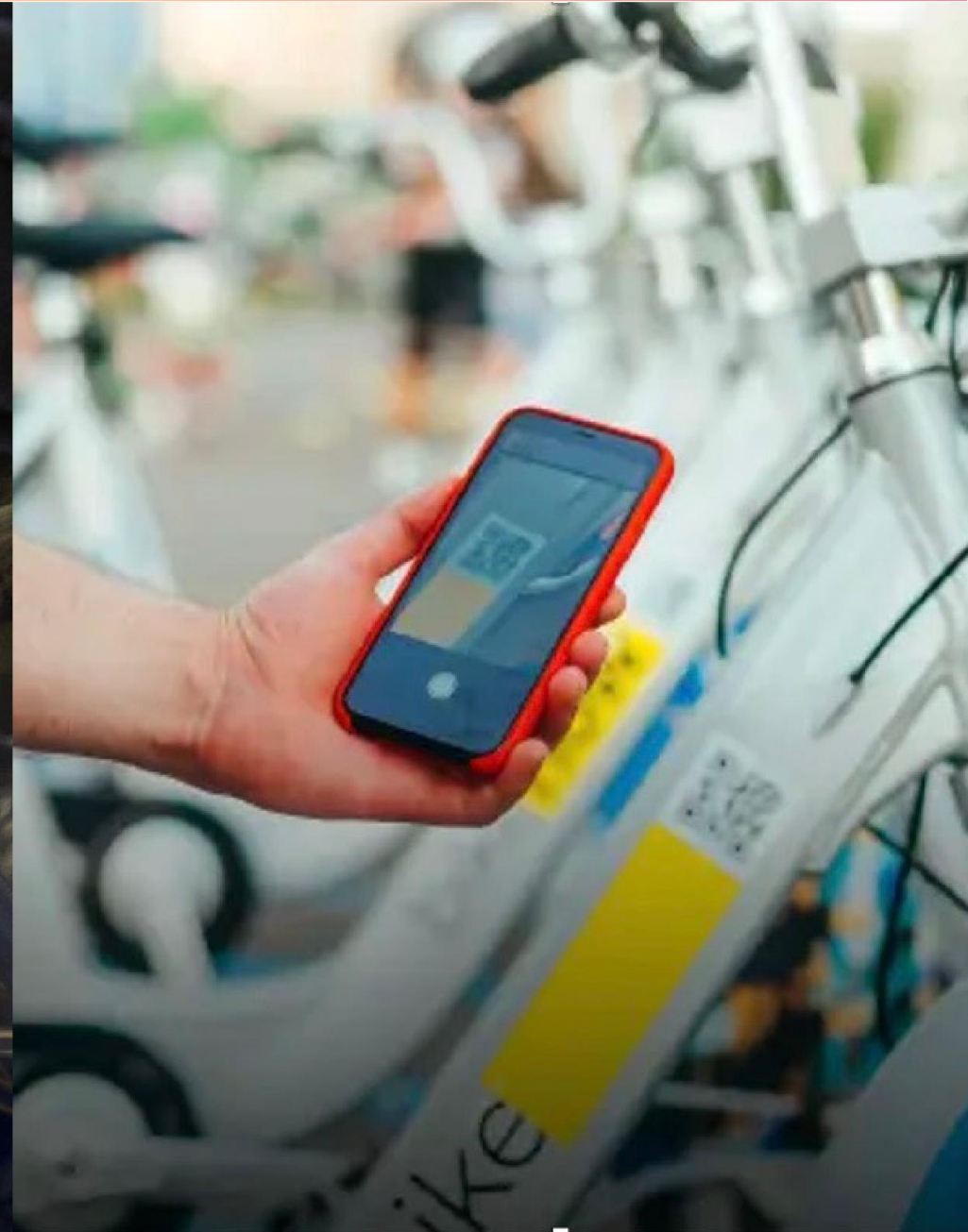
- Limited capacity on trains
- Investment required
- Inconvenience

Bike Parking + Bikeshare

- + Ideal for **commuters**
- + Convenience
- + No train space required
- + Higher capacity

- Space available at/around stations
- Investment required
- Management challenges

The future: fully integrated Systems



The future: multi-modal mobility hubs



Questions?

Follow me on
LinkedIn for
daily updates



h.swarttouw@ecf.com





CONFERENCE
2026
MAASTRICHT

KEYNOTE BY GUNTA ANCA

PRESIDENT OF THE EUROPEAN DISABILITY
FORUM (EDF)



epfconference.eu



Towards a more inclusive mobility

Gunta Anca, EDF President

EPF Conference (5th June 2026)



Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Commission. Neither the European Union nor the granting authority can be held responsible for them.



Funded by the
European Union

Freedom of movement



- The Maastricht Treaty gave form to the freedom of movement.
- For persons with disabilities, this remains an unrealised ideal.
- Inaccessible urban spaces and transport systems continue to prevent us from moving freely



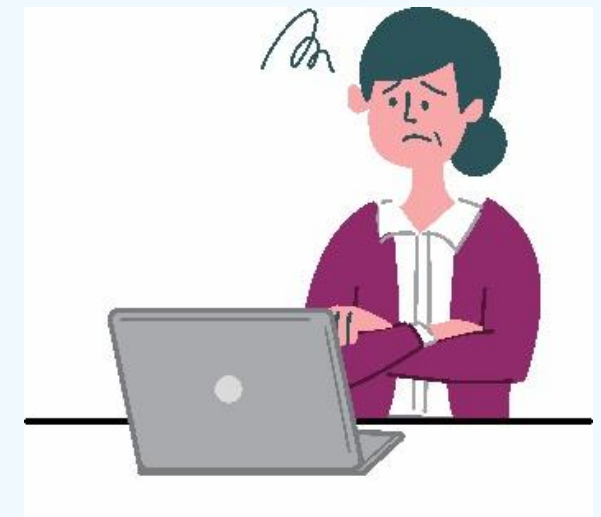


Funded by the
European Union

Barriers to freedom of movement



- Every journey is a careful calculation of access, energy, trust and hope.
- More time, money and effort than people without disabilities.
- Impact on education, employment, access to basic services, social and cultural life.





Funded by the
European Union

Inclusive mobility

EUROPEAN
DISABILITY
FORUM

- Inclusive mobility as a matter of human rights, independent living and equal participation in society.
- Implemented through concrete initiatives that make transport systems more accessible and affordable.
- Autonomous and spontaneous journeys as the end goal



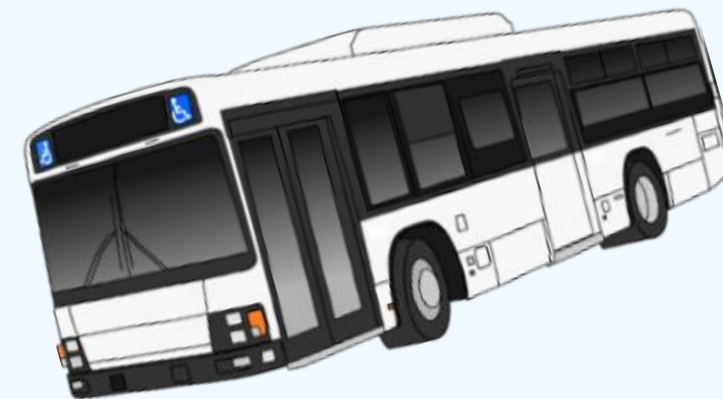
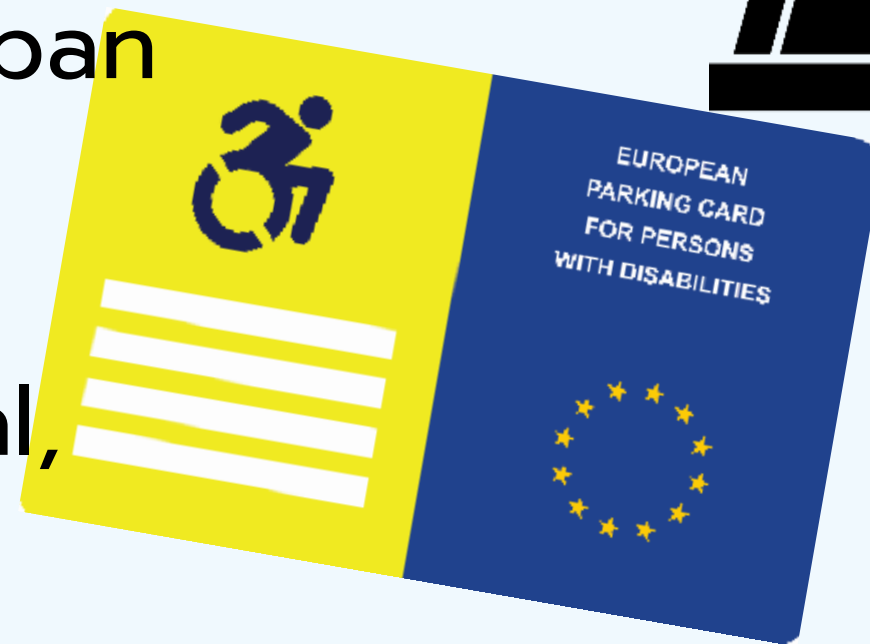


Funded by the
European Union

Accessibility



- Accessibility as a chain: from information provision and journey planning to urban layouts and transport infrastructures
- Diverse access requirements: physical, sensorial, intellectual and cognitive disabilities
- Need for strong legislation



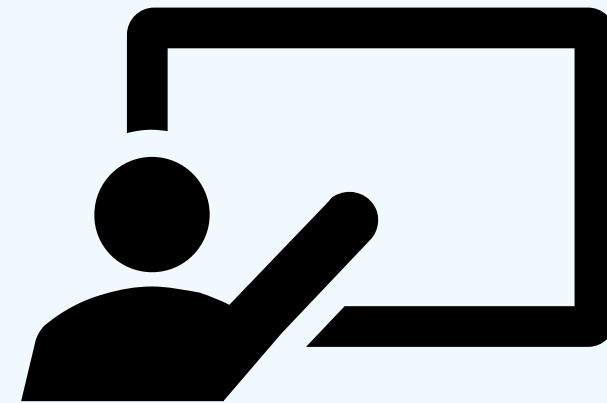


Funded by the
European Union

Beyond accessibility legislation



- Monitoring, complain handling and enforcement
- Training on accessibility
- Involvement of organisations of persons with disabilities





Funded by the
European Union

Involving persons with disabilities



- Testing solutions and identifying obstacles
- Conveying specific needs, expectations and preferences
- Supporting innovation
- Prioritisation

Civil society organisations needs sufficient resources and funding to engage meaningfully!





Funded by the
European Union

Inclusive mobility



- Everyone faces barriers at some point in their lives (i.e. older people or families travelling with children).
- Accessibility as an opportunity for human rights, social cohesion, economic development and sustainability.
- Role of regions and cities in achieving inclusive mobility



Thank you!

info@edf-feph.org



Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Commission. Neither the European Union nor the granting authority can be held responsible for them.



CONFERENCE
2026
MAASTRICHT

PANEL DISCUSSION: PUBLIC TRANSPORT ON THE LOCAL AND REGIONAL LEVEL



GUNTA ANCA

EDF



HENK SWARTTOUW

ECF



MANU LAGEIRSE

Transdev



THOMAS GEIER

EMTA

epfconference.eu



CONFERENCE
2026
MAASTRICHT

KEYNOTE BY WOUTER KOOLMEES

CEO OF NEDERLANDSE SPOORWEGEN (NS)



epfconference.eu



CONFERENCE
2026
MAASTRICHT

KEYNOTE BY GIORGIO TRAVAINI

EXECUTIVE DIRECTOR OF EUROPE'S RAIL JOINT
UNDERTAKING



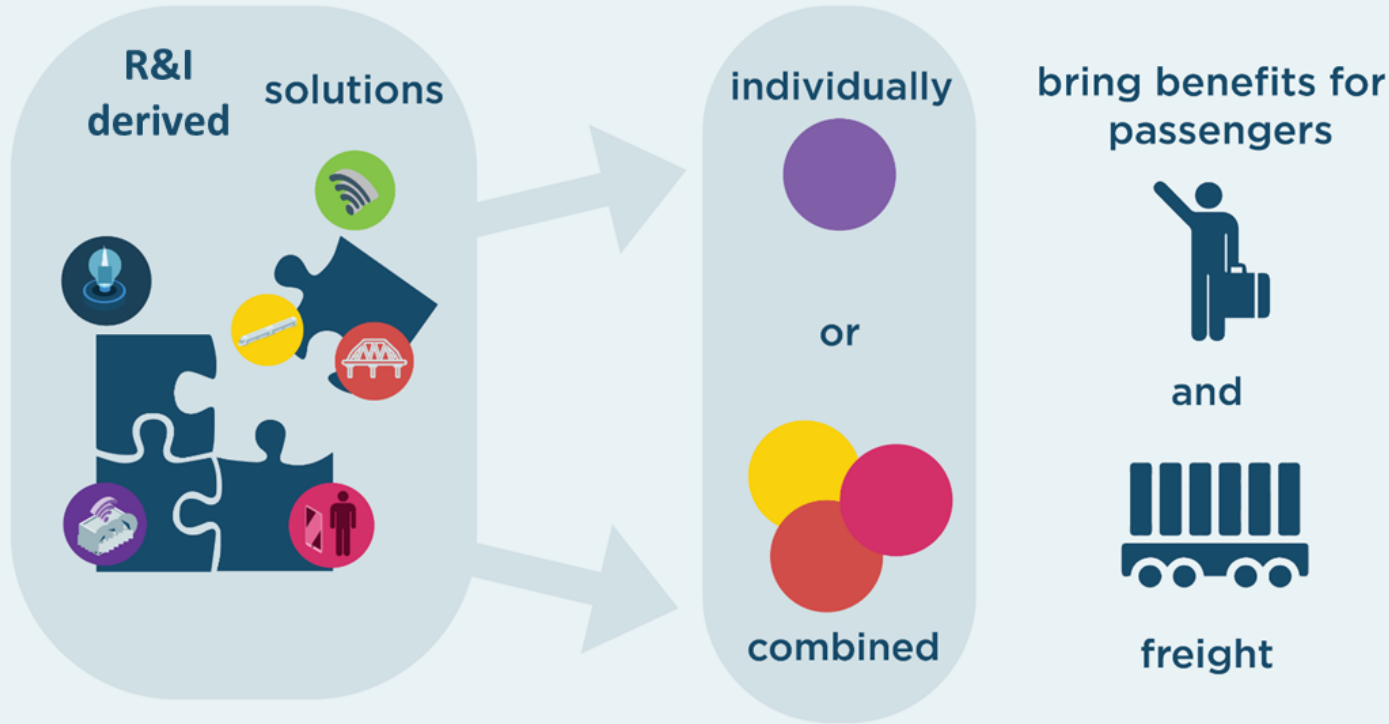
epfconference.eu



**Rail Research and Innovation to
Make Rail the Everyday Mobility**



To make railway an everyday mobility R&I should be **USER FIRST**



Single R&I Programme based on a **system view**

Private Members
contribution,
**€615
million**

EU contribution,
**€615
million**

DEPLOYMENT GROUP

SYSTEM PILLAR

Single governance
and coordination
body

Functional system
architecture

Unified operational
concept

Support Single
European Railways
Area

Common
EU railway system view

CONTINUOUS
EXCHANGE

INNOVATION PILLAR

User-focused
Research &
Innovation

Flagship Projects

Large-scale
demonstrations.

Exploratory,
fundamental R&I

Technological and operational
solutions



EU-Rail after 3 years



29
PRIVATE MEMBERS



377 / 801
PARTICIPANT(S)/ION(S)



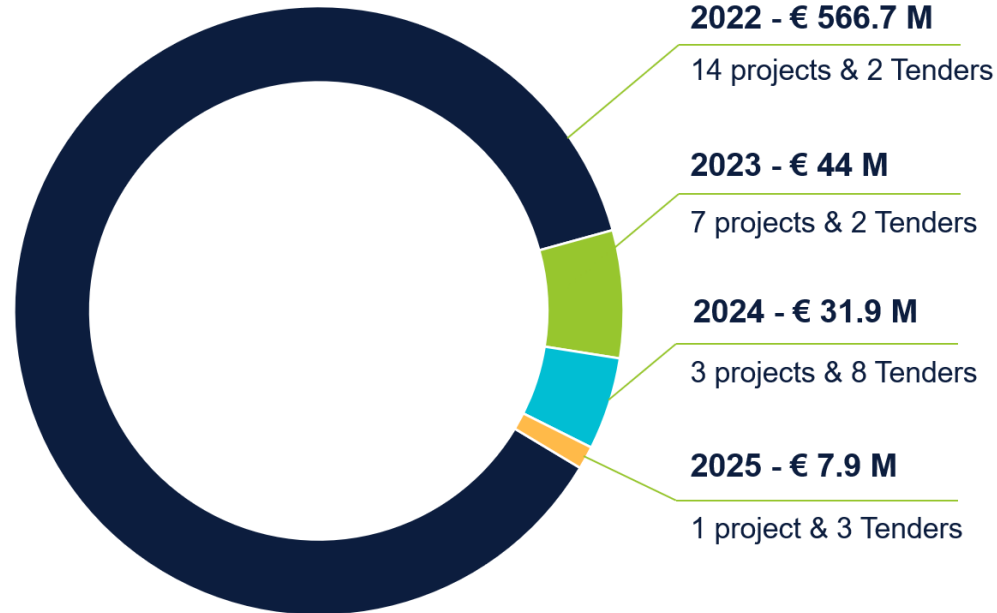
55
SMEs



28
COUNTRIES



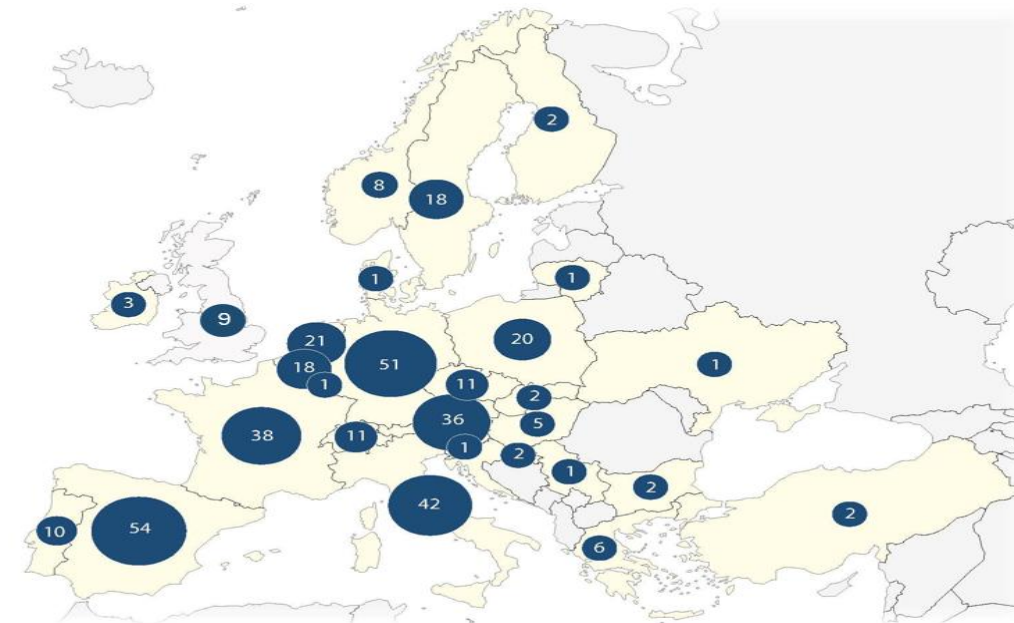
106
RESEARCH CENTERS & UNIVERSITIES



Europe's Rail Members



Number of Participants per Country



Innovation pillar

Deliver operational and technologies solutions to contribute to the European railway system

FA1/TT



FA2



FA3



FA4



FA5



FA6



FA7



Exploratory Research (10)



Examples of achievements



System Pillar

Ensure system architecture, contribute to standards and address migration considerations.

Harmonize operations and products with a powerful and modular architecture.

Reduce process effort on all sides (products, assets, production)

Reduced cost

Accelerate product evolution by creating higher market potential per product

Performance, Capacity, Automation, Digitalisation.

Healthy and affordable product and asset lifecycles.
Manage complexity and knowledge availability risks.

Healthy Business.

Improve interoperability

SERA.

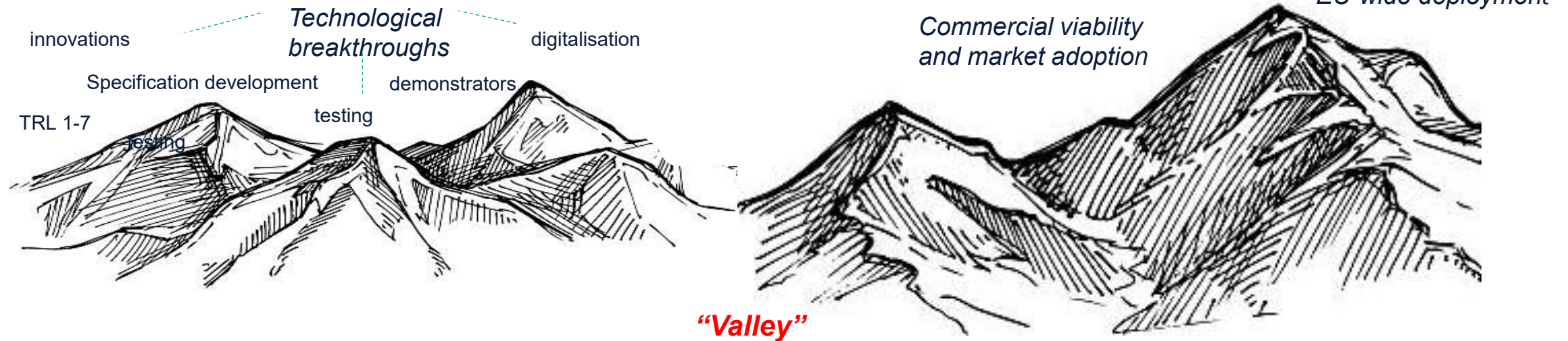
FROM...

*The realm of
Research and Innovation
Programmes*

TO...

*The realm of
Commercial Operations*

Deployment Entity



- Traditional Fragmented Approach:
 - ✓ Research delivers technical solutions (TRL 6-7/8 achieved)
 - ✗ But implementation fails due to misaligned actors and processes
 - ✗ "Valley of Death": alignment R&I, standardisation, regulation, and pre-deployment
- A possible future Rail JU as Integrated Solution



Not sequential handoffs, but parallel loop processes from design – a continuous innovation-to-deployment cycle



Future Directions: System Simplification Mission

A mission that centers on **simplifying the rail systems** and operations while enhancing its fundamental capabilities and **reducing its costs**.

Aiming to strengthen the Single Market and deliver a harmonised **Single European Rail Area (SERA)**

FOCUS ON:

Agility

Resilience

Competitiveness

Enhanced PPP framework building on EU-Rail foundation:

- Expanded scope including **pre-deployment** activities
- Coordinate pre-deployment to **bridge innovation to market impact**
- **Greater inclusiveness**

Coordinated EU-level partnership

A large green double-headed arrow pointing left and right, with the text 'Coordinated EU-level partnership' centered inside it.

€3 billion in R&I innovation addressing the need for costly yet essential one-time developments of innovative solutions aiming to transition the diverse existing legacy systems into a new, simplified European rail system.

€15 billion in pre-deployment from the participation of diverse stakeholders across different countries to upgrade their systems and make investments in their network. Procurement activities to enable a first implementation at system level.

Flagship Initiatives

TRL levels

Entire R&I lifecycle, from studies up to TRL 9

Who

EC, MS, infrastructure managers, terminal operators, rail supply industry, railway undertakings, wagon keepers, logistic industry...

Possible tools

The flagship EU systemic approach fits only within a new rail Joint Undertaking, co-supported by FP10 and European Competitiveness Fund (ECF) instruments, ensuring a continuous innovation-to-deployment cycle.

Outcomes

- Cheaper and faster Implementation (thanks to pre-deployment)
- Less energy consumed
- Improvement of asset availability and performance
- Reducing travel times
- Socio-economic objectives



White Atrium Building, 2nd Floor
Avenue de la Toison d'Or 56-60
B1060, Brussels - Belgium

www.rail-research.europa.eu





CONFERENCE
2026
MAASTRICHT

FUNDING AND FINANCING SUSTAINABLE MOBILITY

epfconference.eu



CONFERENCE
2026
Maastricht

FUNDING AND FINANCING SUSTAINABLE MOBILITY



STEFAN GREBE

Rijkswaterstaat



WALTER ETTY

Rover/EPF

epfconference.eu



WORKSHOPS AFTER LUNCH BREAK

CONFERENCE
2026
MAASTRICHT

STATENZAAL:

FEESTZAAL:

STATENRESTAURANT:

YOUTH DIALOGUE

THROUGH-TICKETING

TEAMING UP FOR MODAL SHIFT



**Students and young professionals
with Oana Gherghinescu and
Dominik Piotrowski**

Jon Worth

Shiva Noori

Juan Caballero

Pablo Decelis

epfconference.eu



CONFERENCE
2026
MAASTRICHT



13:00-
14:00 PM

LUNCH BREAK

#EPFCONFERENCE2026

Connecting Europeans

epfconference.eu

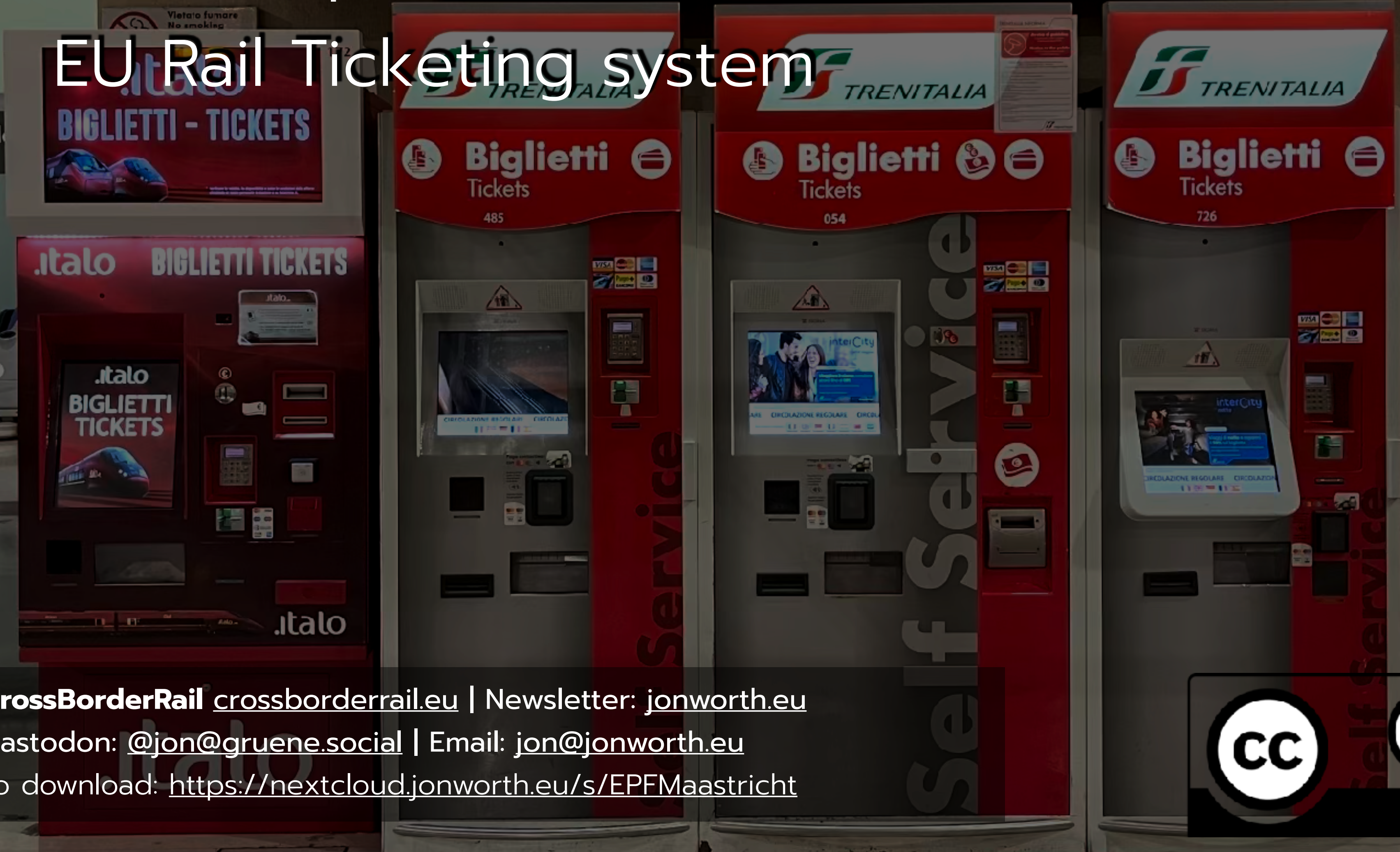


EPF Conference Maastricht

Workshop about reform of the
EU Rail Ticketing system

| | | | | | |
|--------------|-------|--------------|-------|------------------|---|
| Regionale/R | 16619 | CARNIA | 21:12 | 7 | |
| REGIONALE AV | 9749 | MILANO C.LE | 21:27 | BUSINESS IN CODA | 2 |
| Regionale/R | 1896 | MILANO OPIC. | 21:38 | 8 | |

MAR 11 20:06
E' VIETATO OLTREPASSARE LA LINEA GIALLA IN ATTESA DEI TRENI



Jon Worth, Initiator of #CrossBorderRail crossborderrail.eu | Newsletter: jonworth.eu
Bluesky: [@jonworth.eu](https://bsky.app/profile/jonworth.eu) | Mastodon: [@jon@gruene.social](https://mstdn.social/@jon) | Email: jon@jonworth.eu
.key, .pdf and .pptx files to download: <https://nextcloud.jonworth.eu/s/EPFMaastricht>





How to Work with the EU Institutions

A Practical Guide
to Successful
Public Affairs
in the EU

'this comprehensive
book provides
guidance for successful
EU advocacy'

*Doug Pinlham, President,
Public Affairs Council*

edited by

Alan Hardacre



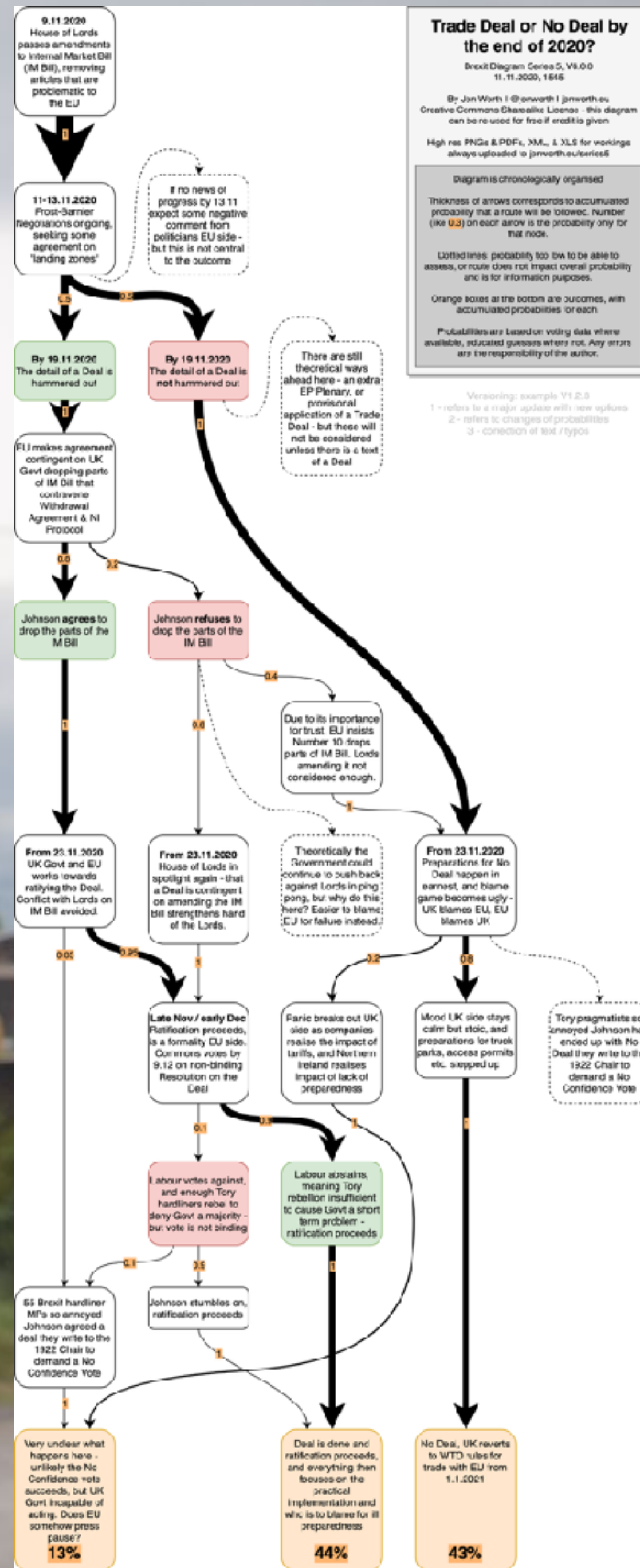
How to Work with the EU Institutions

A Practical Guide to Successful Public Affairs in the EU

'this comprehensive book provides guidance for successful EU advocacy'

Doug Pintham, President, Public Affairs Council

edited by Alan Hardacre



How to Work with the EU Institutions

A Practical Guide
to Successful
Public Affairs
in the EU

'this comprehensive
book provides
guidance for successful
EU advocacy'

*Doug Pinlham, President,
Public Affairs Council*

edited by

Alan Hardacre





Workshop Structure



Workshop Structure

Round of introductions

Presentation of the proposal

Discussion

Chatham House rule - what is said can be used beyond this room, but cannot be attributed





How did we get here?

How did we get here?

No sooner was the ink dry on the **2021 Rail Passenger Rights Regulation**, clear it was inadequate for a (semi-)liberalised railway

Party political pressure for a fix, notably from Greens 2023-2024

Commitment to bring forward legislation in **von der Leyen's 2024 Political Guidelines**

13 May 2026: **"Passenger Package" Proposals** from Commission



Kallio3 - European Parliament - February 21, 2012 - CC BY-SA 2.0 - <https://flickr.com/photos/ubicumque/6791810586/>



“Passenger Package” Basics

“Passenger Package” Basics

All the documents you need:

<https://bit.ly/PassengerPackage>

(Link is case sensitive!)

“Passenger Package” Basics

“Passenger Package” Basics

3 pieces of legislation, all proposed Regulations (directly applicable)

- COM(2026) 231 - Regulation on **multimodal booking** and repealing Regulation (EC) No 80/2009
- COM(2026) 232 - Regulation on **rail ticketing**
- COM(2026) 233 - Regulation amending Regulation (EU) 2021/782 as regards the **protection of passengers** with single tickets

Subject to **Ordinary Legislative Procedure** - both EP and Council can propose amendments. **No deadline/timeline** for approval (or not).

“Passenger Package” Basics

3 pieces of legislation, all proposed Regulations (directly applicable)

- COM(2026) 231 - Regulation on **multimodal booking** and repealing Regulation (EC) No 80/2009
- COM(2026) 232 - Regulation on **rail ticketing**
- COM(2026) 233 - Regulation amending Regulation (EU) 2021/782 as regards the **protection of passengers** with single tickets

Most important here today

Subject to **Ordinary Legislative Procedure** - both EP and Council can propose amendments. **No deadline/timeline** for approval (or not).

“Passenger Package” Basics

3 pieces of legislation, all proposed Regulations (directly applicable)

- COM(2026) 231 - Regulation on **multimodal booking** and repealing Regulation (EC) No 80/2009
- COM(2026) 232 - Regulation on **rail ticketing**
- COM(2026) 233 - Regulation amending Regulation (EU) 2021/782 as regards the **protection of passengers** with single tickets

Most important here today

To be read in conjunction with 232

Subject to **Ordinary Legislative Procedure** - both EP and Council can propose amendments. **No deadline/timeline** for approval (or not).

"Passenger Package" Basics

3 pieces of legislation, all proposed Regulations (directly applicable)

- COM(2026) 231 - Regulation on **multimodal booking** and repealing Regulation (EC) No 80/2009
- COM(2026) 232 - Regulation on **rail ticketing**
- COM(2026) 233 - Regulation amending Regulation (EU) 2021/1153 regarding the **protection of passengers** with single tickets

Most important here today

To be read in conjunction with 232

Text in bold is always my emphasis!

Subject to **Ordinary Legislative Procedure** - both EP and Council propose amendments. **No deadline/timeline** for approval (or not)

COM(2026) 232 - Article 3

Definitions

(13) 'single ticket' means a single ticket as defined in Article 3, point (9a), of Regulation (EU) 2021/782;

COM(2026) 233, amending 2021/782 - Article 1

(9a) 'single ticket' means valid evidence, regardless of its form, of a **through-ticket** or of **the conclusion of two or more transport contracts for a journey purchased in a single commercial transaction** from a railway undertaking, ticket vendor or tour operator;

COM(2026) 232 - Article 4

Obligation to provide content to online ticketing service providers (sharing obligation)

1. A railway service provider **shall conclude a commercial agreement with a requesting online ticketing service provider** for the purpose of providing content for the display, re-linking, resale or distribution of its rail products.

[...]

A railway service provider shall enter into negotiations for the conclusion of the agreement referred to in the first subparagraph within **two months** of receiving the request of the online ticketing service provider. Unless otherwise agreed between the parties, **the agreement shall be concluded within eight months** from receiving the request.

COM(2026) 232 - Article 4

Obligation to negotiate

Obligation to provide content to online ticketing service providers (sharing obligation)

1. A railway service provider **shall conclude a commercial agreement with a requesting online ticketing service provider** for the purpose of providing content for the display, re-linking, resale or distribution of its rail products.

[...]

A railway service provider shall enter into negotiations for the conclusion of the agreement referred to in the first subparagraph within **two months** of receiving the request of the online ticketing service provider. Unless otherwise agreed between the parties, **the agreement shall be concluded within eight months** from receiving the request.

COM(2026) 232 - Article 4

Obligation to negotiate

Obligation to provide content to online ticketing service providers (sharing obligation)

1. A railway service provider **shall conclude a commercial agreement with a requesting online ticketing service provider** for the purpose of providing content for the display, re-linking, resale or distribution of its rail products.

[...]

With deadlines

A railway service provider shall enter into negotiations with the conclusion of the agreement referred to in the first subparagraph within **two months** of receiving the request of the online ticketing service provider. Unless otherwise agreed between the parties, **the agreement shall be concluded within eight months** from receiving the request.

COM(2026) 232 - Article 5

Obligation for indispensable railway online ticketing service providers to host rail products (hosting obligation)

1. An online ticketing service provider shall be deemed an 'indispensable railway online ticketing service provider' if it is **vertically integrated** with a railway undertaking that is designated under Article 7 as having a **significant market presence** in any given Member State.

COM(2026) 232 - Article 7

1. A railway undertaking shall be designated as having significant railway market presence in a given Member State where it provides **50 per cent or more of the rail passenger services in that Member State, expressed in passenger kilometres.**

COM(2026) 232 - Article 5

Think DB Navigator or SNCF Connect

Obligation for indispensable railway online ticketing service providers to host rail products (hosting obligation)

1. An online ticketing service provider shall be deemed an 'indispensable railway online ticketing service provider' if it is **vertically integrated** with a railway undertaking that is designated under Article 7 as having a **significant market presence** in any given Member State.

COM(2026) 232 - Article 7

1. A railway undertaking shall be designated as having significant railway market presence in a given Member State where it provides **50 per cent or more of the rail passenger services in that Member State, expressed in passenger kilometres.**

COM(2026) 232 - Article 5

Obligation for indispensable railway online ticketing service providers to host rail products (hosting obligation)

2. An indispensable railway online ticketing service provider **shall conclude a commercial agreement with a requesting railway service provider** for the purpose of displaying, re-linking, reselling or distributing the rail products of that provider for rail passenger services **that are operated, or have their origin or destination, in the Member State in which the railway undertaking that is vertically integrated** with the online ticketing service provider has significant railway market presence within the meaning of Article 7.

COM(2026) 232 - Article 5

Obligation for indispensable railway online ticketing service providers to host rail products (hosting obligation)

Obligatory



2. An indispensable railway online ticketing service provider **shall conclude a commercial agreement with a requesting railway service provider** for the purpose of displaying, re-linking, reselling or distributing the rail products of that provider for rail passenger services **that are operated, or have their origin or destination, in the Member State in which the railway undertaking that is vertically integrated** with the online ticketing service provider has significant railway market presence within the meaning of Article 7.

COM(2026) 232 - Article 5

Obligation for indispensable railway online ticketing service providers to host rail products (hosting obligation)

Obligatory



2. An indispensable railway online ticketing service provider **shall conclude a commercial agreement with a requesting railway service provider** for the purpose of displaying, re-linking, reselling or distributing the rail products of that provider for rail passenger services **that are operated, or have their origin or destination, in the Member State in which the railway undertaking that is vertically integrated** with the online ticketing service provider has significant railway market presence within the meaning of Article 7.

National, and limited cross border impact



COM(2026) 232 - Article 6

Fair and non-discriminatory conditions

1. Railway service providers entering into commercial agreements pursuant to Article 4(1) shall:

(a) **not attach any unfair conditions** to the commercial agreement or require the acceptance of any supplementary conditions that are not necessary
[...]

(c) upon request, supply to the online ticketing service provider **all the real time data**
[...]

(e) **allow the online ticketing service provider to combine any rail products**, including those of different railway service providers, provided **minimum connection times** laid down in accordance with Article 15 of Implementing Regulation (EU) 2026/253 are applied;

COM(2026) 232 - Article 6 cont.

Fair and non-discriminatory conditions

1. Railway service providers entering into commercial agreements pursuant to Article 4(1) shall:

[...]

(f) allow the online ticketing service provider, when it combines rail products, to **sell that combination as a single ticket;**

(g) ensure, where it is agreed that remuneration shall be applied, that such **remuneration is fair, reasonable and non-discriminatory;**

(h) ensure that requirements on **look-to-book ratios are fair**

COM(2026) 232 - Article 6 cont.

Fair and non-discriminatory conditions

1. Railway service providers entering into commercial agreements pursuant to Article 4(1) shall:

[...]

Re-selling as a "single ticket" cannot be prevented

(f) allow the online ticketing service provider, when it combines rail products, to **sell that combination as a single ticket;**

(g) ensure, where it is agreed that remuneration shall be applied, that such **remuneration is fair, reasonable and non-discriminatory;**

(h) ensure that requirements on **look-to-book ratios are fair**

COM(2026) 232 - Article 6 cont.

Fair and non-discriminatory conditions

1. Railway service providers entering into commercial agreements pursuant to Article 4(1) shall:

[...]

Re-selling as a "single ticket" cannot be prevented

(f) allow the online ticketing service provider, when it combines rail products, to **sell that combination as a single ticket;**

(g) ensure, where it is agreed that remuneration shall be applied, that such **remuneration is fair, reasonable and non-discriminatory;**

(h) ensure that requirements on **look-to-book ratios are fair**

No 0.7% for re-selling OUIGO any more

COM(2026) 232 - Article 8

Booking horizon

Railway service providers shall make tickets for a railway service available for sale **at least five months** before the operation of that railway service, provided it has been included in the working timetable as defined in Article 5, point (14) of [Regulation on the use of rail infrastructure capacity]. This requirement shall not limit the ability of the railway service provider to vary its fares or **add new services to the working timetable over time**. Tickets for added services shall be made available without delay after the inclusion in the working timetable.

COM(2026) 232 - Article 8

Booking horizon

Railway service providers shall make tickets for a railway service available for sale **at least five months** before the operation of that railway service, provided it has been included in the working timetable as defined in Article 5, point (14) of [Regulation on the use of rail infrastructure capacity]. This requirement shall not limit the ability of the railway service provider to vary its fares or **add new services to the working timetable over time**. Tickets for added services shall be made available without delay after the inclusion in the working timetable.

Opens up danger that a "single ticket" might not be available in all cases

COM(2026) 233, amending 2021/782 - Article 1

(2) Article 12 is amended as follows:

[...]

2. For journeys involving long-distance or regional rail passenger services under a **single ticket, the railway undertaking whose delayed or cancelled or early departed service causes a missed connection with one or more services under that same single ticket shall be liable** in accordance with Articles 18, 19 and 20 for all relevant disruption occurring during the entire journey if the passenger misses one or more connections. **Railway undertakings whose services under a single ticket are missed due to a missed connection shall allow the passenger to continue the journey on their next service, subject to the availability of seats.**

COM(2026) 233, amending 2021/782 - Article 1

(2) Article 12 is amended as follows:

[...]

2. For journeys involving long-distance or regional rail passenger services under a **single ticket, the railway undertaking whose delayed or cancelled or early departed service causes a missed connection with one or more services under that same single ticket shall be liable** in accordance with Articles 18, 19 and 20 for all relevant disruption occurring during the entire journey if the passenger misses one or more connections. **Railway undertakings whose services under a single ticket are missed due to a missed connection shall allow the passenger to continue the journey on their next service, subject to the availability of seats.**

Does not extend to taking other companies' services

Défense absolue
de toucher aux fils électriques
Ligne de contact sous tension



DANGER DE MORT

Structuring the discussion

Défense absolue
de toucher aux fils électriques
Ligne de contact sous tension



DANGER DE MORT

Structuring the discussion

First, questions for understanding - is this explained adequately? Factual questions

Second, is the Commission's approach on this topic welcome or not?

Third, if changes to the text are necessary, how could these be achieved?



EPF Conference Maastricht

Workshop about reform of the
EU Rail Ticketing system

PROTECT
WHAT
MATTERS.



Jon Worth, Initiator of #CrossBorderRail crossborderrail.eu | Newsletter: jonworth.eu

Bluesky: [@jonworth.eu](https://bsky.app/profile/jonworth.eu) | Mastodon: [@jon@gruene.social](https://mastodon.social/@jon@gruene.social) | Email: jon@jonworth.eu

.key, .pdf and .pptx files to download: <https://nextcloud.jonworth.eu/s/EPFMaastricht>



BY

SA

Teaming Up for Modal Shift

**How Public Transport and Shared Mobility Can Truly Work
Together for Users**



This project has received funding from the Horizon Europe research and innovation programme under grant agreement No 101095904

5 June 2026

About us

UPPER & Eurocities



- **UPPER** – Unleashing the Potential of Public Transport in Europe – is a Horizon Europe project coordinated by UITP (International Association of Public Transport) where Eurocities works on dissemination and transferability. UPPER aims to strengthen the role of public transport as the cornerstone of sustainable and innovative mobility. The project will implement a combination of measures in 10 cities and regions.



- **Eurocities** is the network of more than 200 cities in 38 countries, representing 130 million people, working together to ensure a good quality of life for all. We work on different areas: culture, environment, social affairs... and mobility 🚌 🚆 🚲 🚶 And celebrating 40 years next week in... Utrecht! 🎂 🎉



UPPER



Address key urban challenges such as climate change, air quality, road safety, social inclusion and accessibility

The Challenge



40 partners from 10 different European Member States, driven by Cities' and Regions' priorities.

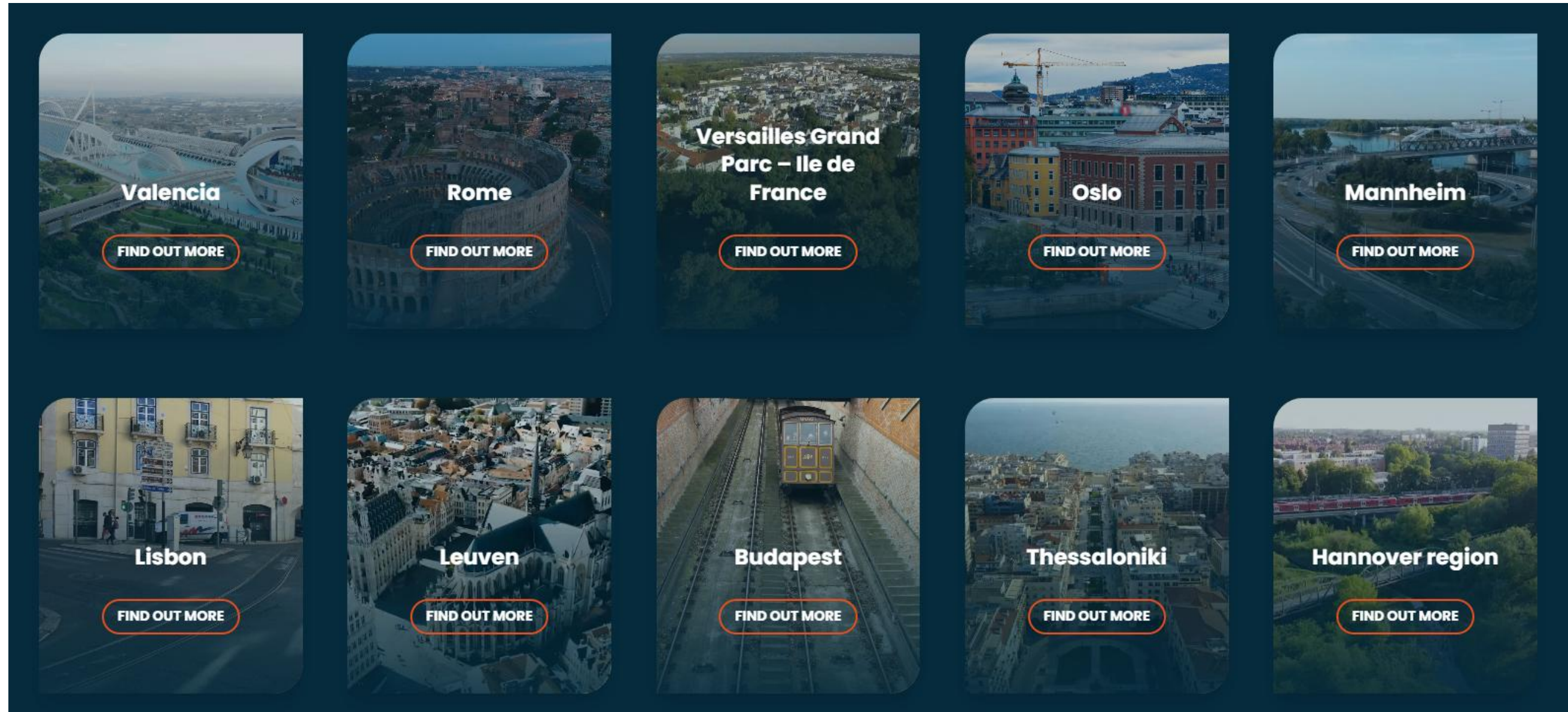
The Consortium



10 cities and many more take-up cities

The Living Labs

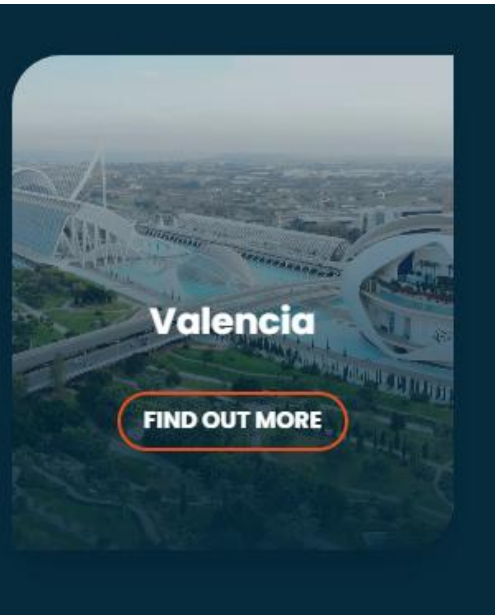
The 10 cities and regions



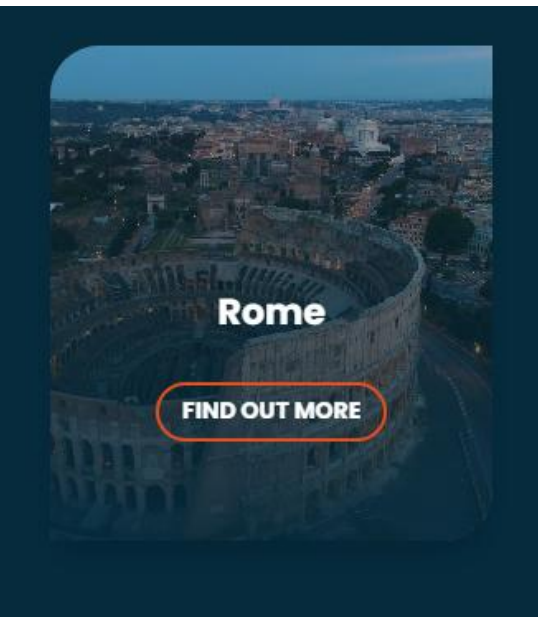
The 10 cities and regions and its measures

- VAL_02 Creation of a network of multimodal hubs

Deployment of a network of multimodal information hubs along one of Valencia's main urban corridors. Each hub provides a unified digital interface displaying real-time information from different mobility services, including urban and interurban buses, rail services, and shared mobility options.



The 10 cities and regions and its measures



- ROM_03 Adapt the PT offer and include **new mobility services** in multimodal interchange nodes

Rome aims to enhance sustainable mobility through various measures outlined in the SUMP. This specific measure focuses on improving intermodality by encouraging users to shift from private transport to LPT and from road to rail for suburban and local public transport services. This will be achieved through coordinated PT schedules, integrated information systems, unified fares and ticketing systems, and innovative services at transportation nodes.

The 10 cities and regions and its measures

- **IDF_04 Added-value services in multimodal nodes to integrate active modes with PT**

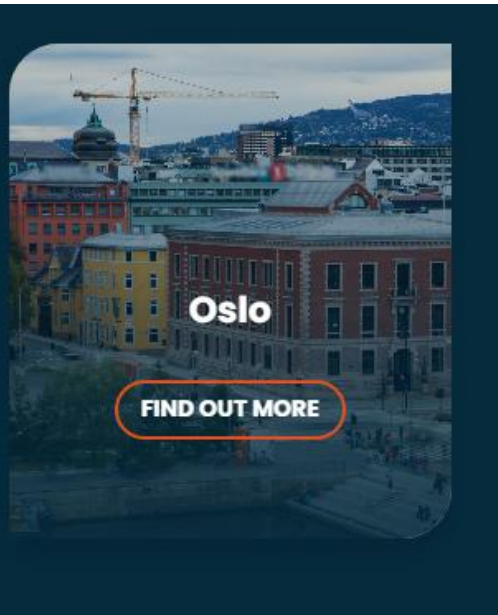
This measure aims to **increase the visibility of new micro-mobility services** and promote active modes like walking and cycling. Bike and e-scooter rental stations will be strategically placed in areas such as train stations, main bus lines, and residential districts. These services will be integrated into the MaaS application developed by Instant System.



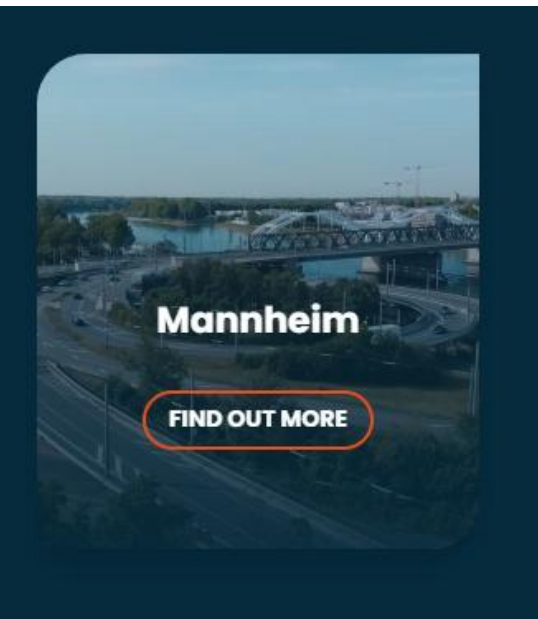
The 10 cities and regions and its measures

- OSL_06 **E-bike** subscription for companies

This measure explored how e-bike subscriptions, can support more sustainable travel behaviour and reduce dependency on private car ownership. The pilot generated valuable insights into barriers for adoption and how these services can complement public transport.



The 10 cities and regions and its measures



- **MAN_02 Campaigning for sustainable forms of transport**

The communication campaign focuses on three main areas: promoting public transportation as a sustainable and inclusive service for climate change, improving connectivity in suburban areas and positively influencing community perceptions of public transportation. The campaign aims to strengthen the local public transportation culture and address the changing needs of customers, particularly older age groups. Targeted marketing measures will highlight the advantages of public transport for specific user groups and promote them as part of mobility management.

The 10 cities and regions and its measures

- **LIS_09 To improve the integration of PT and active travel modes**

Improving cycle parking infrastructure at interfaces and integrating PT with public bike **sharing services at the ticketing level**. The implementation of cycling infrastructure on PT interfaces will follow SmartHub methodologies, involving defining a hierarchy of interfaces, creating bike parking and monitoring their use.



The 10 cities and regions and its measures

- **LEU_03+04 To increase visibility and ease of use of public transport by offering improved information on public transport, parking and shared mobility options**

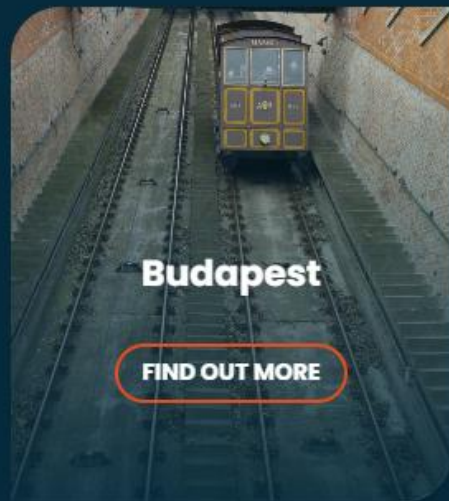
This measure aims to enhance the provision of information on public transport, parking, and **shared mobility**. Targeted (push) communication will be deployed to encourage visitors to use alternative transport modes or peripheral car parks.



The 10 cities and regions and its measures

- **BUD_05 New services to increase accessibility and convenience of PT**

This measure aims to introduce a predictive travel planning option within the BudapestGO journey planner application. The new feature developed will provide a solution to the problem in a similar way to the Waze application, being that able to manage a significant source of customer feedback. The aim is to be able to minimize the communication of incorrect estimates and to increase the reliability of the data provided by the BudapestGO application.



The 10 cities and regions and its measures



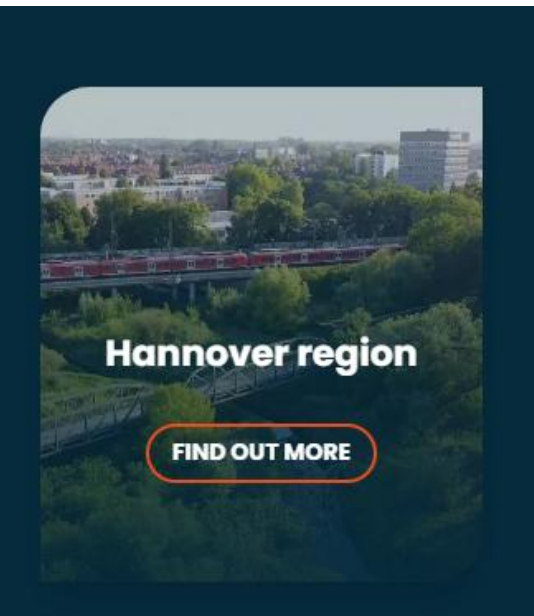
- **TES_08 To create new incentive-based services in the MDMS system to increase the use of PT**

This measure aims to improve accessibility in Thessaloniki by developing a tool for evidence-based decision-making and personalized mobility packages. It involves identifying areas where **first/last mile trips can be enhanced through shared mobility**. Traffic zones with high potential for shared modes will be identified, optimal locations for shared mobility hubs will be proposed, and the cost of multimodal trips will be compared to existing modes. The neutral platform will enable stakeholders to **assess the competitiveness of shared mobility** and make informed decisions for enhancing transportation options.

The 10 cities and regions and its measures

- **HAN_03 Added-value services in multimodal nodes to integrate public transport with active modes**

We aim to improve the passenger experience and promote multimodal transportation at stations by implementing Bike+Ride facilities. This includes secure bicycle parking, on-site **bike sharing services, and bicycle repair options.**



U-TOOLS (UPPER Toolkit)



U-TWIN



U-NEED



U-SIM



U-SUMP



U-GOV



U-KNOW



U-TRANSFER

➤ <https://www.publictransportknowledge.eu/>

- **Best practices, innovative solutions, and expert knowledge**
- **Help you tackle public transport challenges**
- **For city planners, transport operators, policymakers or just interested people**
- **You can suggest new content**



Thank you!

Juan Caballero

juan.a.caballero@eurocities.eu



This project has received funding from the Horizon Europe research and innovation programme under grant agreement No 101095904



UPPER contributes to achieving the aims of the CIVITAS Initiative and the goals of the EU Mission: Climate-Neutral and Smart Cities

About us

Not for Profit

Research & Consultancy

- Accelerating the transition to zero emission mobility through clean energy, smart infrastructure, and circular innovations.
- Empowering a sustainable and inclusive future.
- Independent Experts
- Building on 20 years of experience



Teaming Up for Modal Shift

How Public Transport and
Shared Mobility Can Truly Work
Together for Users

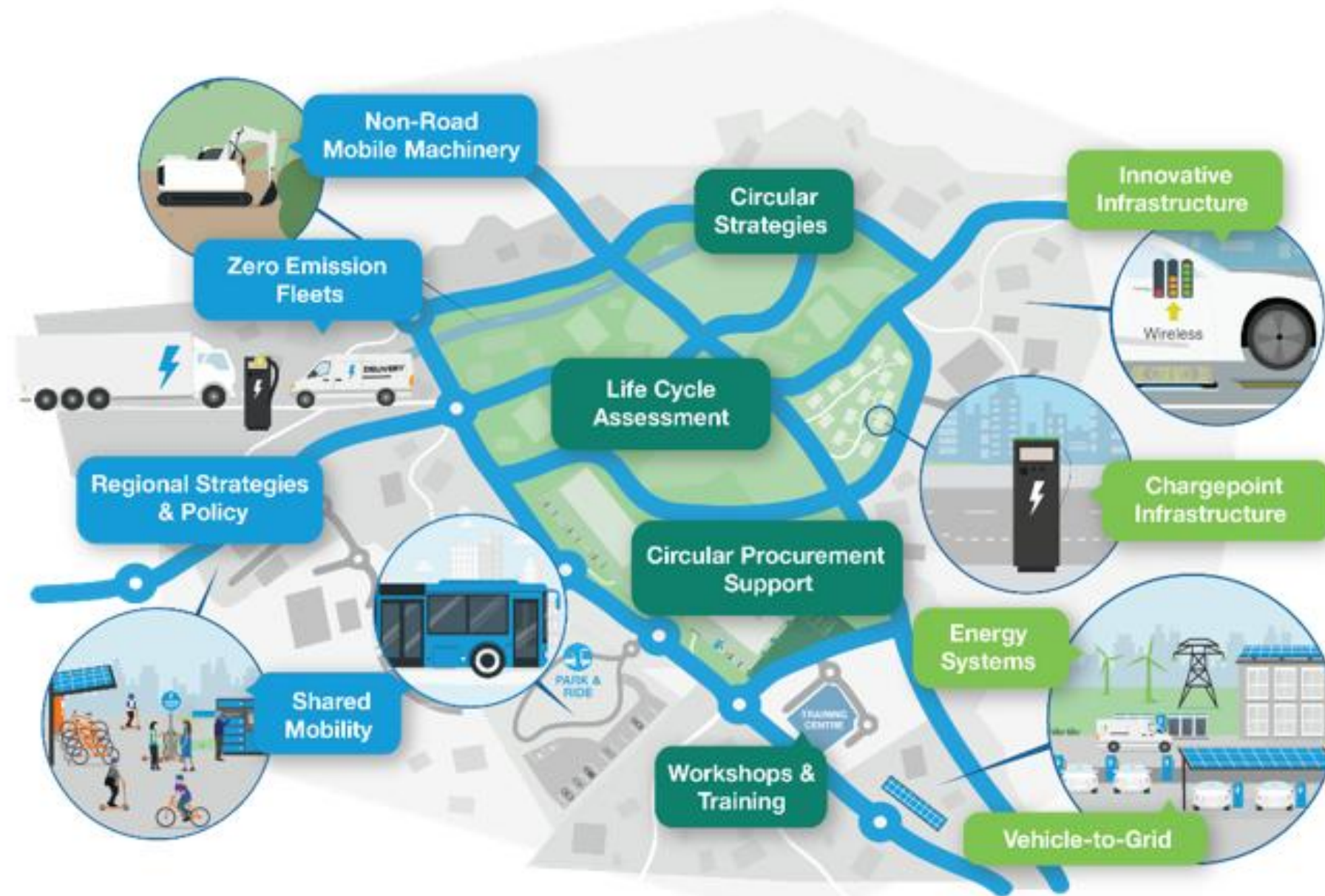
About us

Not for Profit

Research & Consultancy

- Accelerating the transition to zero emission mobility through clean energy, smart infrastructure, and circular innovations.
- Empowering a sustainable and inclusive future.
- Independent Experts
- Building on 20 years of experience

Our landscape of expertise in sustainable mobility and resource use



+31 (0)20 36 99 883
www.cenexgroup.nl
hello@cenexgroup.nl
@CenexNL

A-lab building
Overhoeksplein 2
1031 KS Amsterdam
Nederland



Agenda

1

GEMINI

Greening European Mobility Through Cascading innovation initiatives

2

Cenex tools

XIPE : Cross Impact Performance Emissions

TOTEC: Total Ownership Tracking Economics Calculator

3

Policy handbook

An interactive approach to New Mobility Services

GEMINI



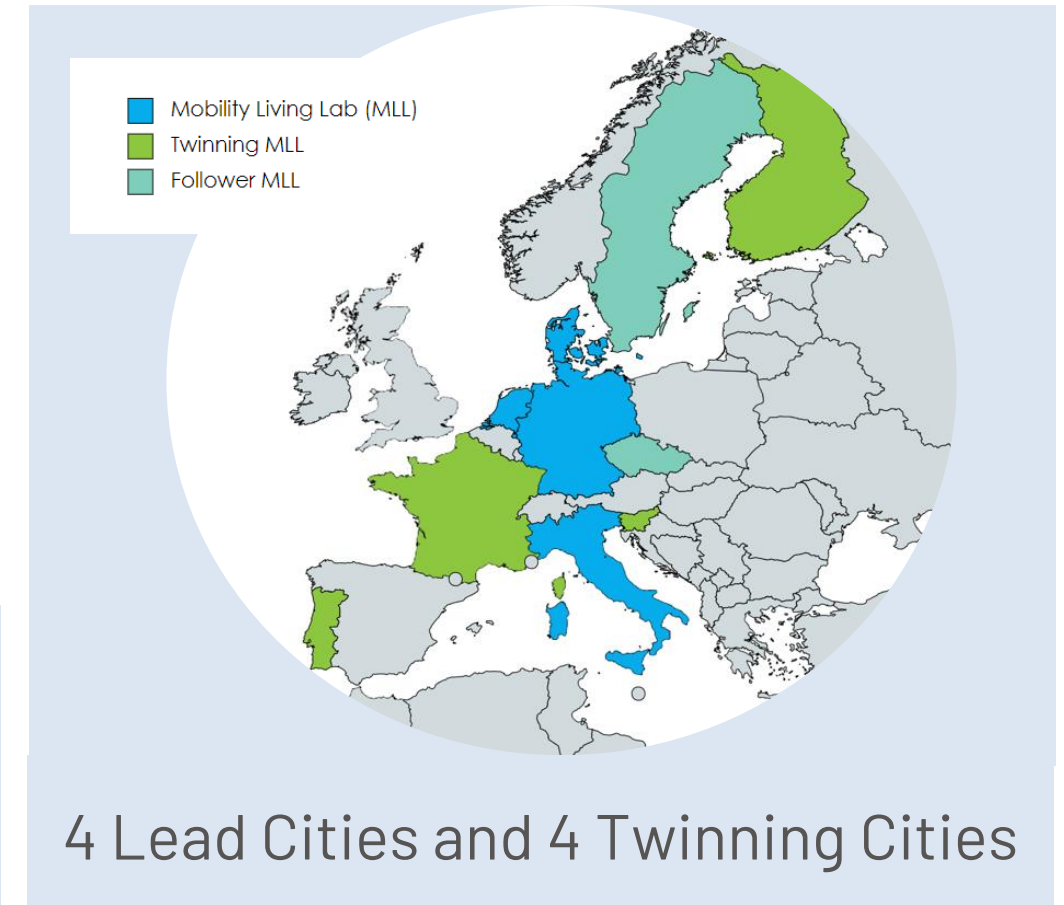
Address key urban challenges such as climate change, air quality, road safety, social inclusion and accessibility.

The Challenge



43 partners from 17 different European States, driven by Cities' and Regions' priorities.

The Consortium



4 Lead Cities and 4 Twinning Cities

The Living Labs

GEMINI will develop and test **sustainable business models** for **New Mobility Services (NMS)** to increase **shared mobility** solutions (MaaS and MaaSC)

GEMINI Mobility Living Labs



MLL 2 - **Copenhagen:**
Multimodal mobility hubs in
Greater Copenhagen peri-
urban context



MLL 1 - **Amsterdam:**
Mobility as a
Commons (MaaC)



Twinning MLL 1 - **Paris-Saclay:**
Pan-European carsharing
standards for peri-urban
mobility



Twinning MLL 3 - **Porto:**
MaaS NMS and PT
integration and integrated
mobility management
around Estádio do Dragão



Twinning MLL 4 -
Helsinki: Strengthening
peri-urban mobility
connections



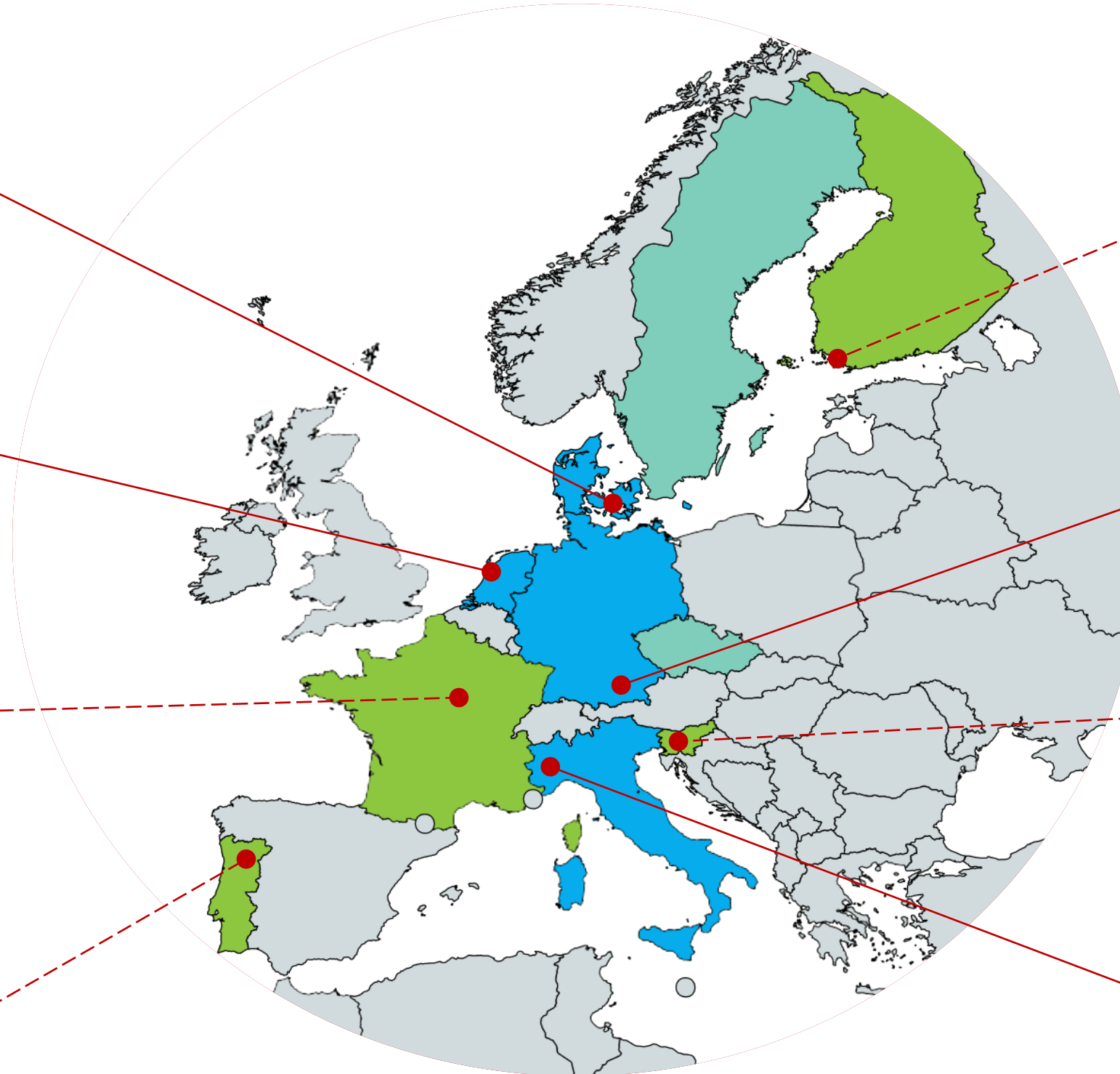
MLL 3 - **Munich:**
Integrated mobility
management during
sports events



Twinning MLL 2 -
Ljubljana: Shared
modes for commuting
and tourist mobility



MLL 4 **Turin:** Holistic
mobility service covering
urban, peri-urban,
suburban, rural areas and
cross border mobility



- Mobility Living Lab (MLL)
- Twinning MLL
- Follower MLL

Cenex Tools



XIPE
Cross Impact Performance
Emissions

- Open-access, easy to use web-based tool
- Calculator to compare the total cost of ownership for different mobility models.
- Assesses private vehicles vs. shared mobility vs. community-based transport.
- Built to be transparent and adjustable for local conditions (scenario inputs).

TOTEC

Total Ownership Tracking
Economics Calculator

- Open-access, easy to use web-based tool
- Compare the total cost of ownership for different mobility models.
- Assesses private vehicles vs. shared mobility vs. community-based transport.
- Built to be transparent and adjustable for local conditions (scenario inputs).

Cenex Tools

<https://totec.cenexgroup.nl/>

<https://xipe.cenexgroup.nl/>



Policy Handbook

The [GEMINI New Mobility Services Handbook](#) covers policy recommendations, data, and technology insights on new mobility, but rather than a document, it's an interactive 3D city.

Users can click on the different elements of the city and the relevant handbook content opens around it. A smart search engine can also answer questions in plain language along the way.

Built so anyone can see how their city's mobility could work differently.

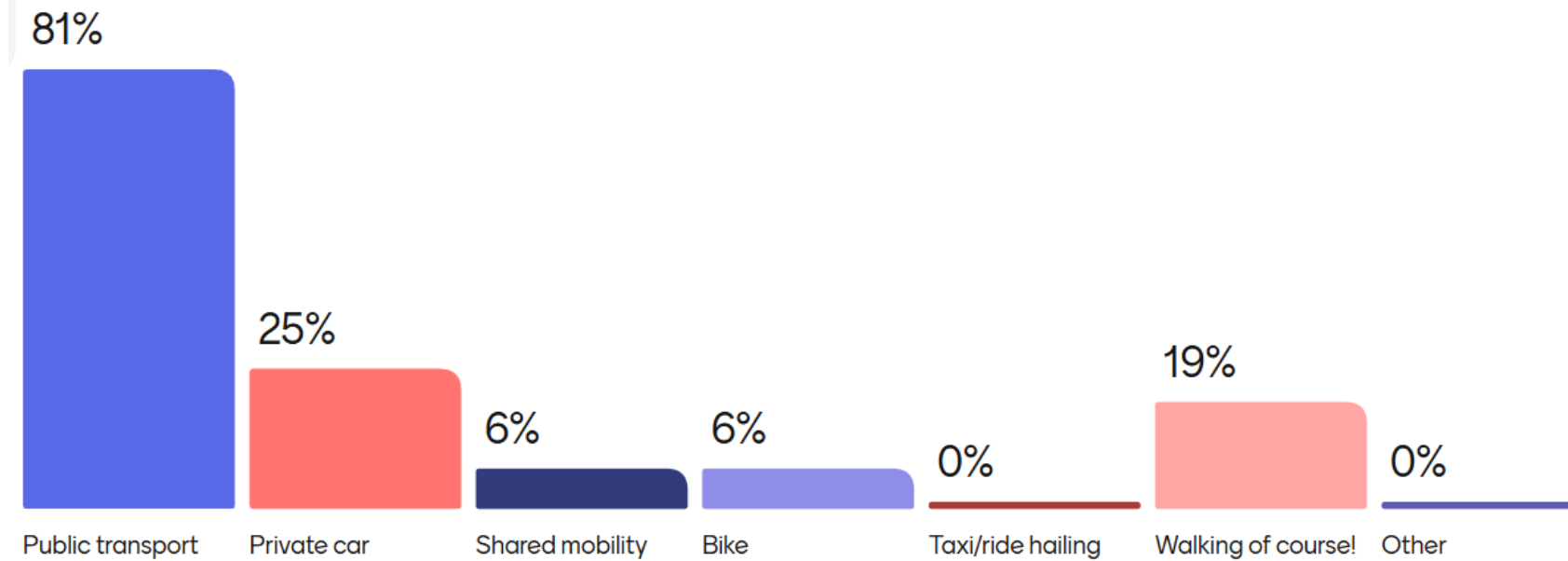


Policy Handbook



Mentimeter

How did you come here ? (Multiple allowed)



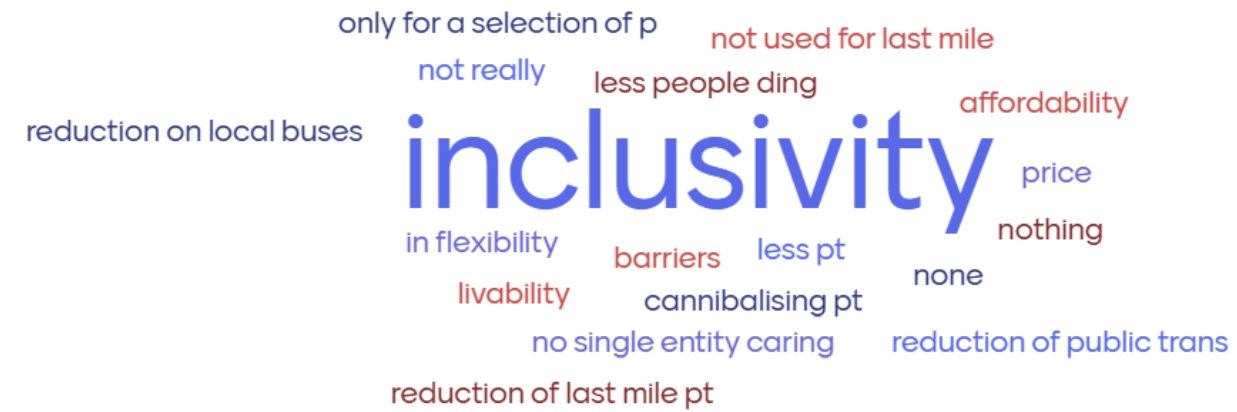
Mentimeter

What is currently the biggest barrier to seamless multimodal travel in cities? (Key words)



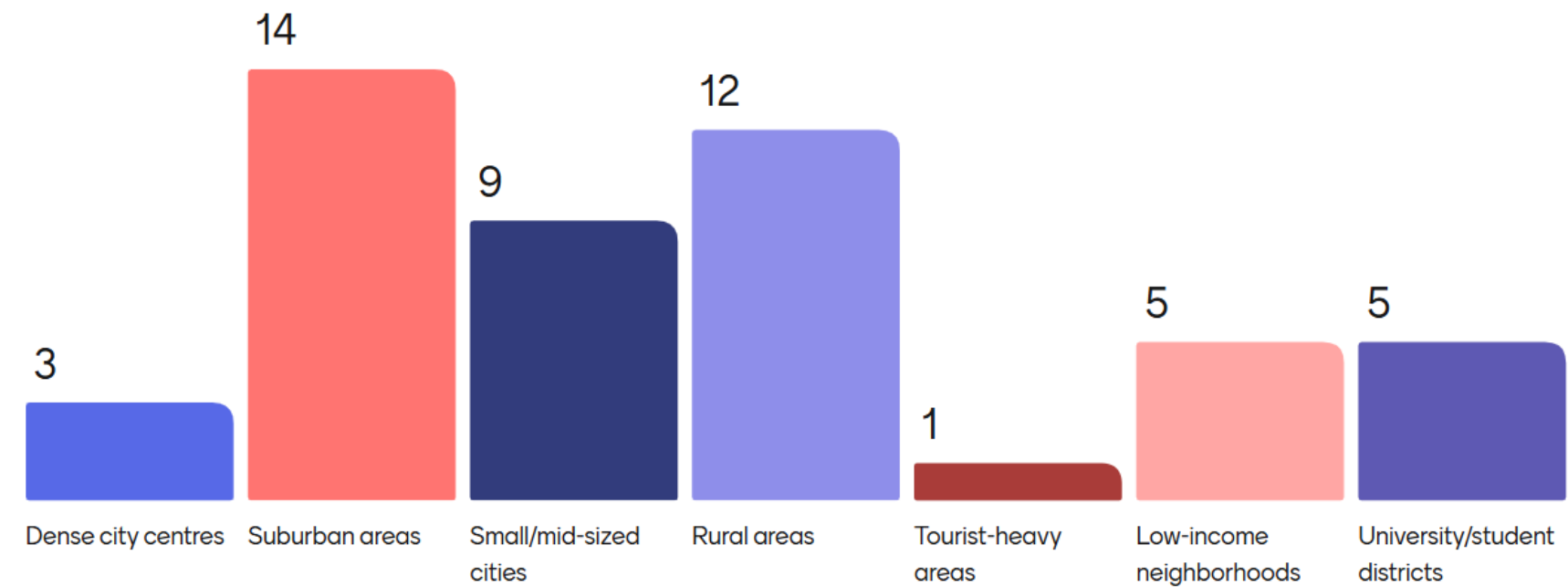
Mentimeter

What risks worry you MOST when public transport and shared mobility become more integrated?

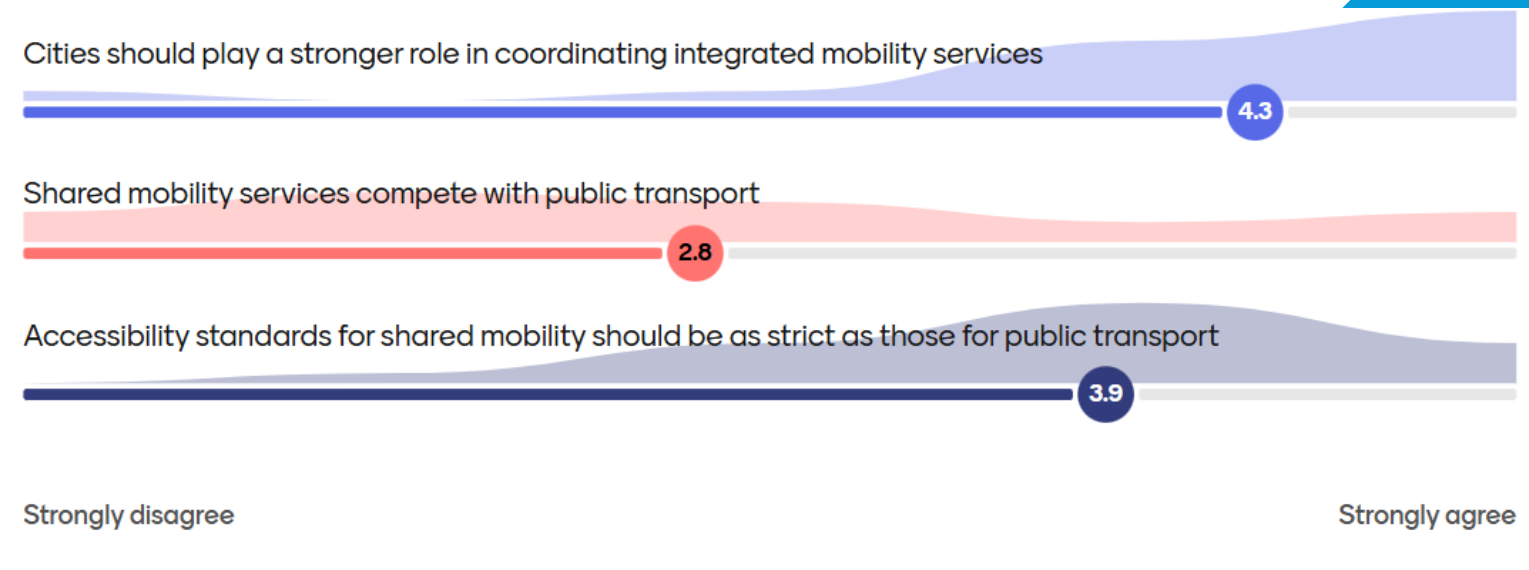


Mentimeter

Where can shared mobility BEST complement public transport for users?



Mentimeter



Mentimeter

If you could introduce ONE policy rule to improve cooperation between public transport and shared mobility for users, what would it be?

Never allow free floating, period.

Intermodal information

open booking APIs to third parties

Invest in it

Share information via standards

Ask the users and their organizations

Proper Research which mobility question it fullfills and how it taps into existing systems

Not compete with or replace public transport, but only for the last miles not served by public transport.

Integrated abonnement/product

Mentimeter

If you could introduce ONE policy rule to improve cooperation between public transport and shared mobility for users, what would it be?

one journey, one account, one payment

Data sharing to support integrated ticketing, wayfinding, and information

Bike parking (home -end) + shared vehicle (activity-end) subscription to add to train subscription

They need to put the bicycles/shared mobility on places reserved for them.

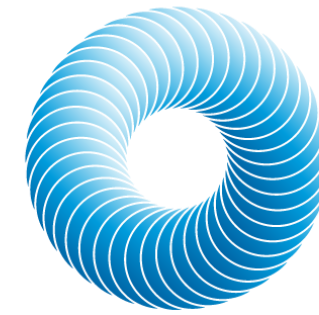
Ons responsabele when There is a problem

Integrated planning, booking, payment for both PT and shared mobility with economic incentive for station use, integrated with a ban on cars in city centres

Complement to pt and not replacement

Give longterm perspective, since car ownership is a longterm decision and behavioral change needs time

Thank you
for your
time



cenex
nederland



Zero Emission
Mobility



Energy
Infrastructure



Circular
Mobility

www.cenexgroup.nl



CONFERENCE
2026
MAASTRICHT



15:00-
15:30 PM

COFFEE BREAK

#EPFCONFERENCE2026

Connecting Europeans

epfconference.eu



CONFERENCE
2026
MAASTRICHT

DOUBLING INTERNATIONAL PASSENGERS BY 2030/2035?

epfconference.eu



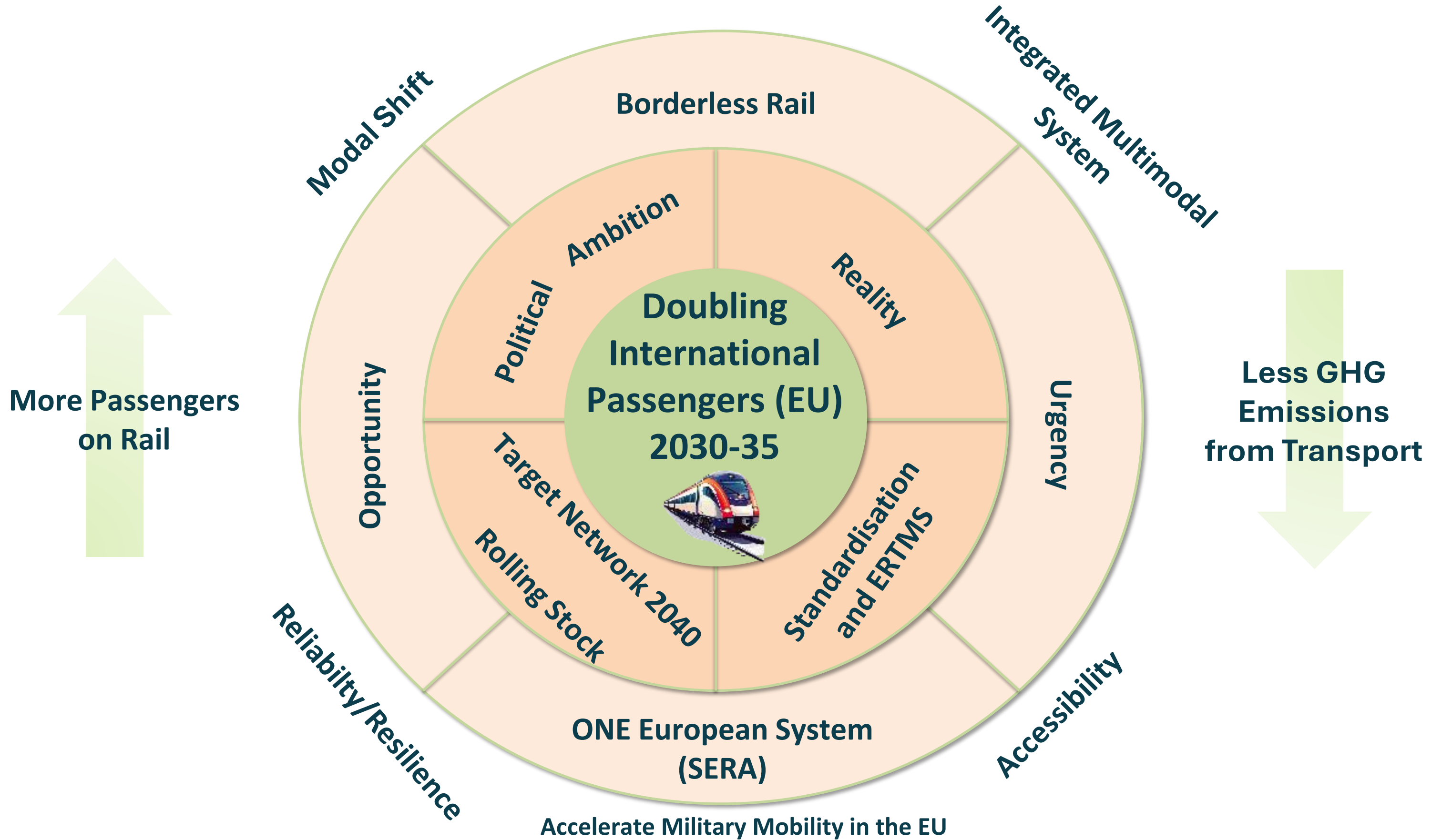
CONFERENCE
2026
MAASTRICHT

KEYNOTE BY JOSEF DOPPELBAUER

CHAIRMAN OF THE NEW SECTOR DELIVERY
GROUP (SDG) OF THE PLATFORM ON
INTERNATIONAL RAIL PASSENGER TRANSPORT
(IRP)



epfconference.eu



The Context

Rail demand is rising;
high-speed corridors are breaking records

Cross-border services remain underdeveloped

Europe still lacks a borderless railway system
30+ years after Maastricht

International Passenger Rail is not competitive with
road, nor with aviation

What Must Change

- Speak plainly: facts, not slogans
- Reset expectations and align ambition with delivery
- Frame doubling international passengers as a **structural transformation**, not an incremental improvement

Why European Rail Has Not Succeeded since 1992?

Technical, operational, and administrative fragmentation of rail

National focus dominates – international services are secondary

Different speeds of national implementation of European law

Entry barriers for new operators, e.g. yearly slot allocation, slow permitting, access to rolling stock

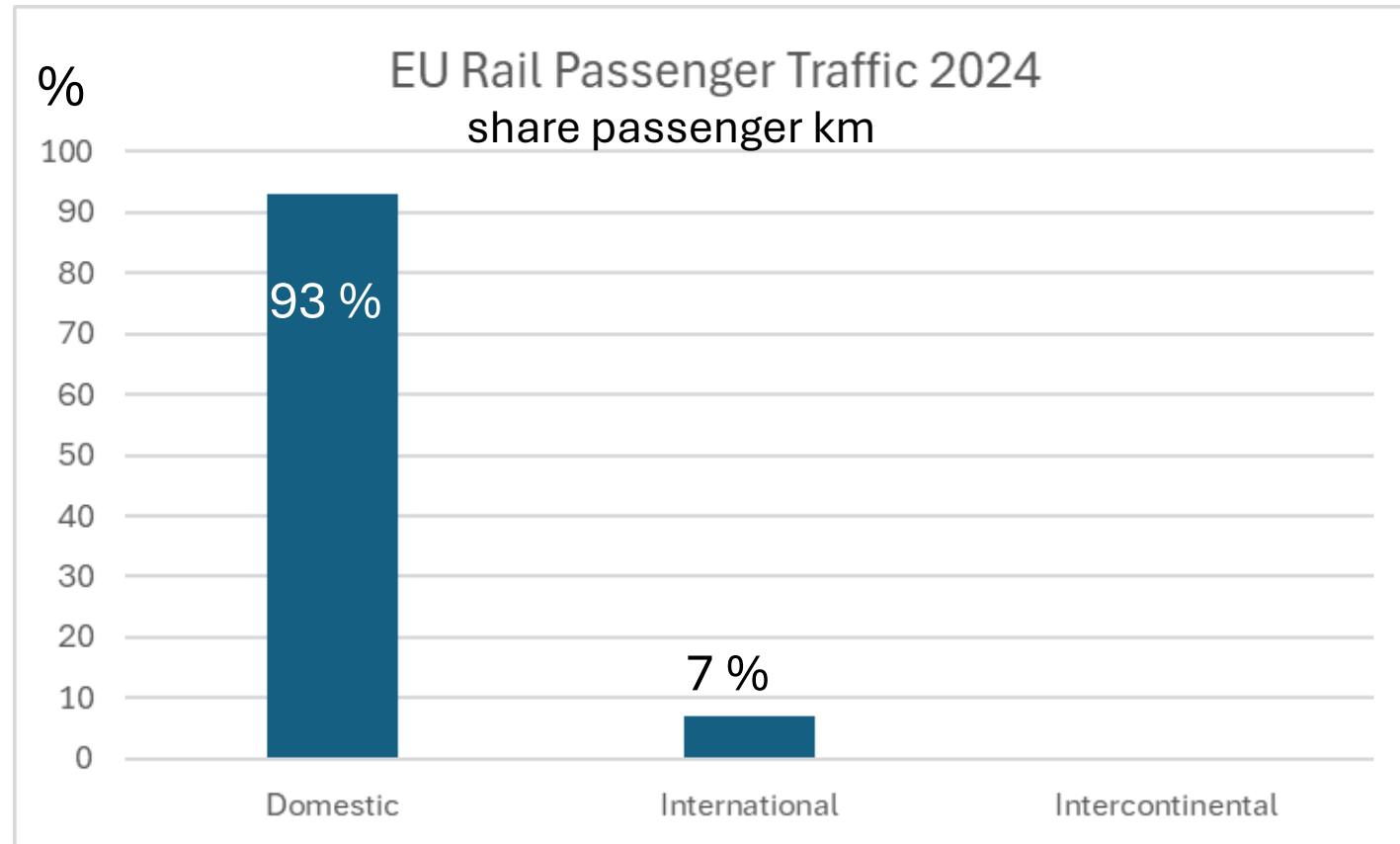
Aviation enjoys tax advantages; rail pays high access charges

Rail sector lacks unity

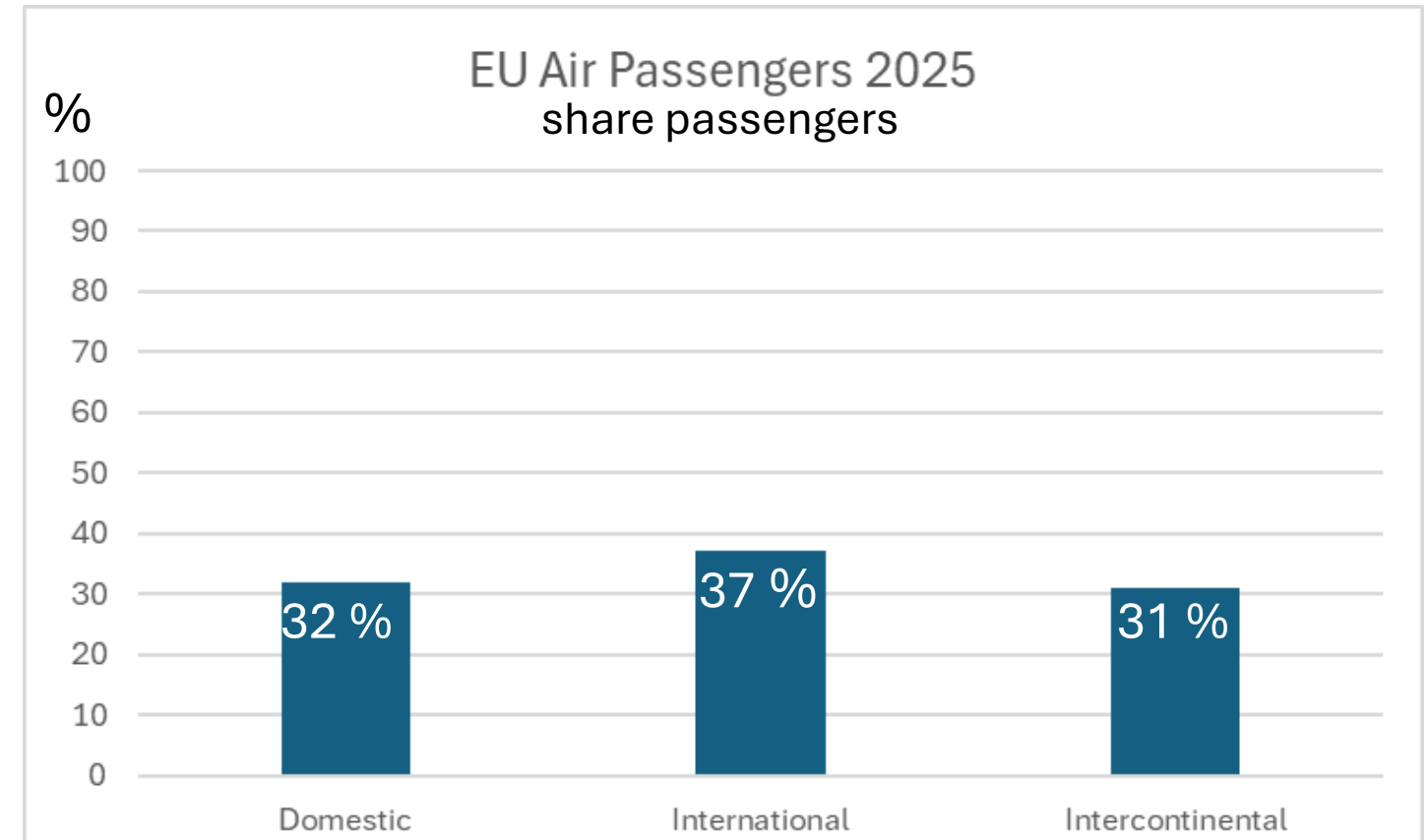
What Must Change

- Acknowledge structural causes honestly
- Address fragmentation as the core barrier
- Create stable, long-term conditions for investment
- Build a unified rail sector voice

Rail vs. Air



Source: EC, DG MOVE
Total 433 billion passenger km



Source: Airports Council International Europe
Total 2,6 billion passengers

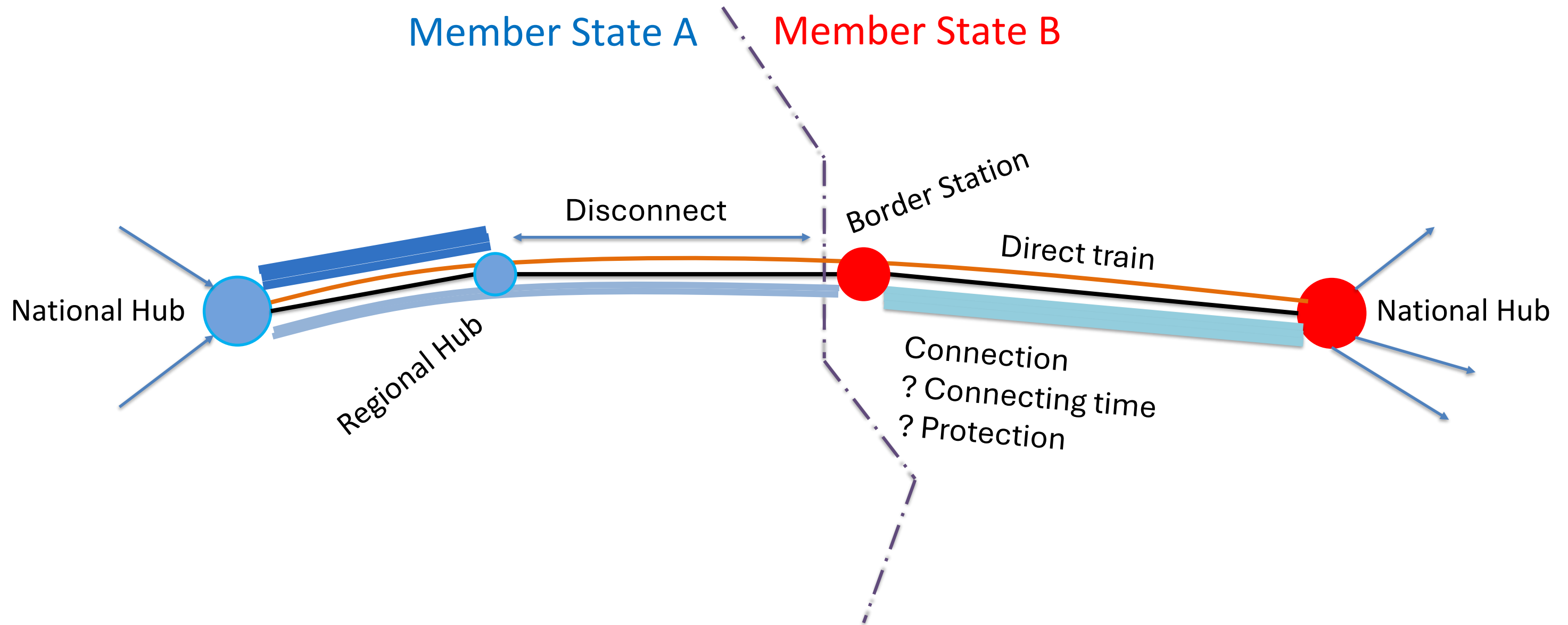
Ticket Prices of Planes vs. Trains

Average price of train tickets compared to flights

| | |
|---|---|
| All routes for all 3 time perspectives | 200% (Twice as much as the flight) |
| All routes, short-term bookings (within a week) | 189% (1.9 times as much as the flight) |
| All routes, mid-term bookings (around a month in advance) | 246% (2.5 times as much as the flight) |
| All routes, long-term bookings (around 4 months in advance) ⁶ | 180% (1.8 times as much as the flight) |

International Rail Passenger Services

Origin – Destination, Travel Time, Frequency, Booking & Protection





A train every 30 min
Vienna Hbf
 (2 million)

| Start | Ziel | Abfahrtszeit | Reisezeit | Ankunft |
|--------------|------------|--------------------------|----------------------|---------|
| Wien Hbf (U) | BRATISLAVA | Ab Sa., 30.05.2026 06:00 | 56 Minuten, 0x Umst. | 07:10 |
| | | Aufahrt: Sa., 30.05.2026 | | |
| | | 06:14 | 59 Minuten, 0x Umst. | 07:44 |
| | | 07:14 | 56 Minuten, 0x Umst. | 08:10 |
| | | 07:45 | 59 Minuten, 0x Umst. | 08:44 |
| | | 08:14 | 56 Minuten, 0x Umst. | 09:10 |
| | | 08:45 | 59 Minuten, 0x Umst. | 09:44 |

65 km

(480 000)
Bratislava



A train every 3 hours
Bruxelles Midi
 (1,25 million)

| Abfahrtszeit | Ziel | Reisezeit | Ankunft | Preis |
|--------------|-------------------------------|---------------|---------|---------|
| 07:15 | BRUXELLES-MIDI / BRUSSEL-ZUID | 34 min direct | | ab 24 € |
| 07:49 | Lille Europe | | | |
| 10:06 | BRUXELLES-MIDI / BRUSSEL-ZUID | 35 min direct | | ab 39 € |
| 10:41 | Lille Europe | | | |
| 13:07 | BRUXELLES-MIDI / BRUSSEL-ZUID | | | ab 24 € |
| 13:41 | Lille Europe | | | |

91 km

(240 000 (1,2 million))
Lille Europe



Construction cost of high-speed rail in Europe:
 20 – 45 million €/km



Development of better international rail passenger services will induce demand.
 Strategic infrastructure enhancement will go hand-in-hand with better services.

The IRP Sector Delivery Group



Ticketing

Fragmented information and inconsistent access to offers
Need interoperable, real-time data-based ticketing

Rolling Stock & Corridors

Interoperable, cost-efficient, go-everywhere rolling stock needed
Stronger governance required for ERTMS and corridor coordination

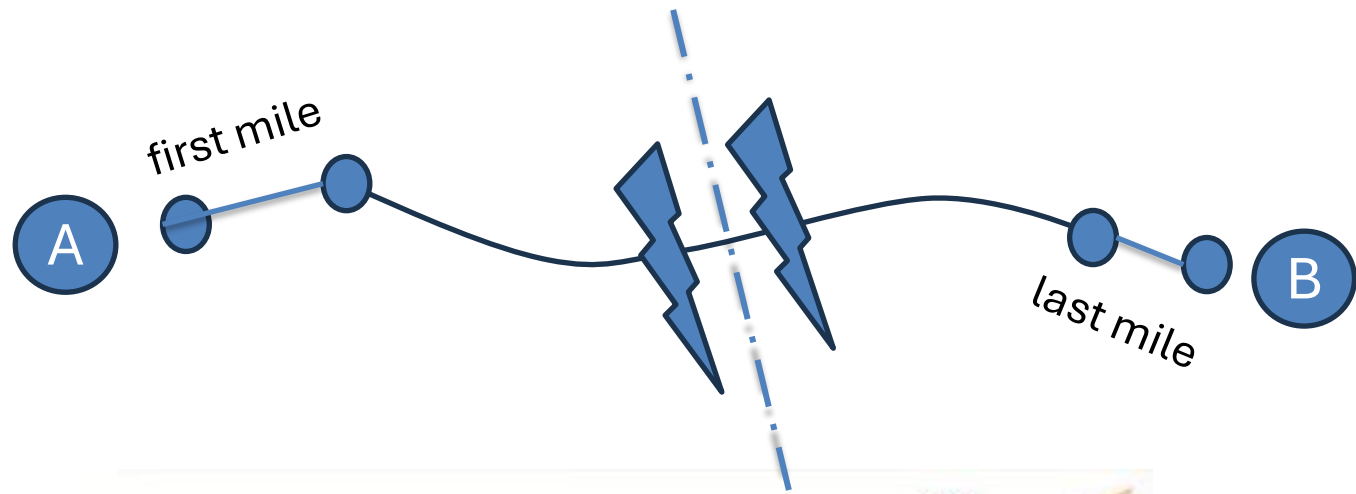
Capacity

Capacity allocation is decisive for sustainable international services
Multiannual funding and Framework Agreements support stability

What do we Expect from Member States?

- Think “beyond the border“ for rail passenger services
- Strategic capacity allocation to support business models
- Fair taxation and polluter-pays principles – level playing field rail vs. car and aviation
- Structural funding for sustainable mobility, promote multi-modality
- Engage in stronger EU-level governance; empower ERA
- Help to create a real **Single European Railway Area**





National Rules



CONFERENCE
2026
MAASTRICHT

PRESENTATION: DOUBLING INTERNATIONAL PASSENGERS BY 2030/2035?



MATTHIEU MAESELLE

RailNetEurope/EuroLink



MÁRTON SPOHN

RailNetEurope

epfconference.eu

European Transport Market Study and EuroLink

RAILNET EUROPE



RAILNET EUROPE

European Transport Market Study (ETMS)



ETMS: Policy Context

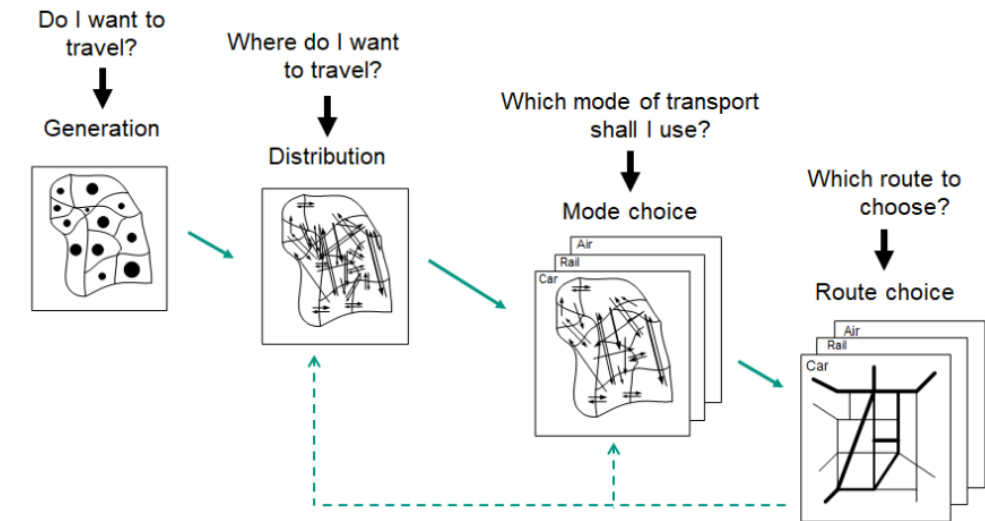
Sustainable and Smart Mobility Strategy of the European Commission:

- **Freight: 50% growth by 2030; 100% by 2050**
- **Passenger: 100% growth by 2030; 200% by 2050**

Where will this growth happen?

How to facilitate the extra trains on the network?

An European Transport Market Study (ETMS) should deliver the input in the detail and format to capacity concepts



RNE launched the first iteration of ETMS

Article 15

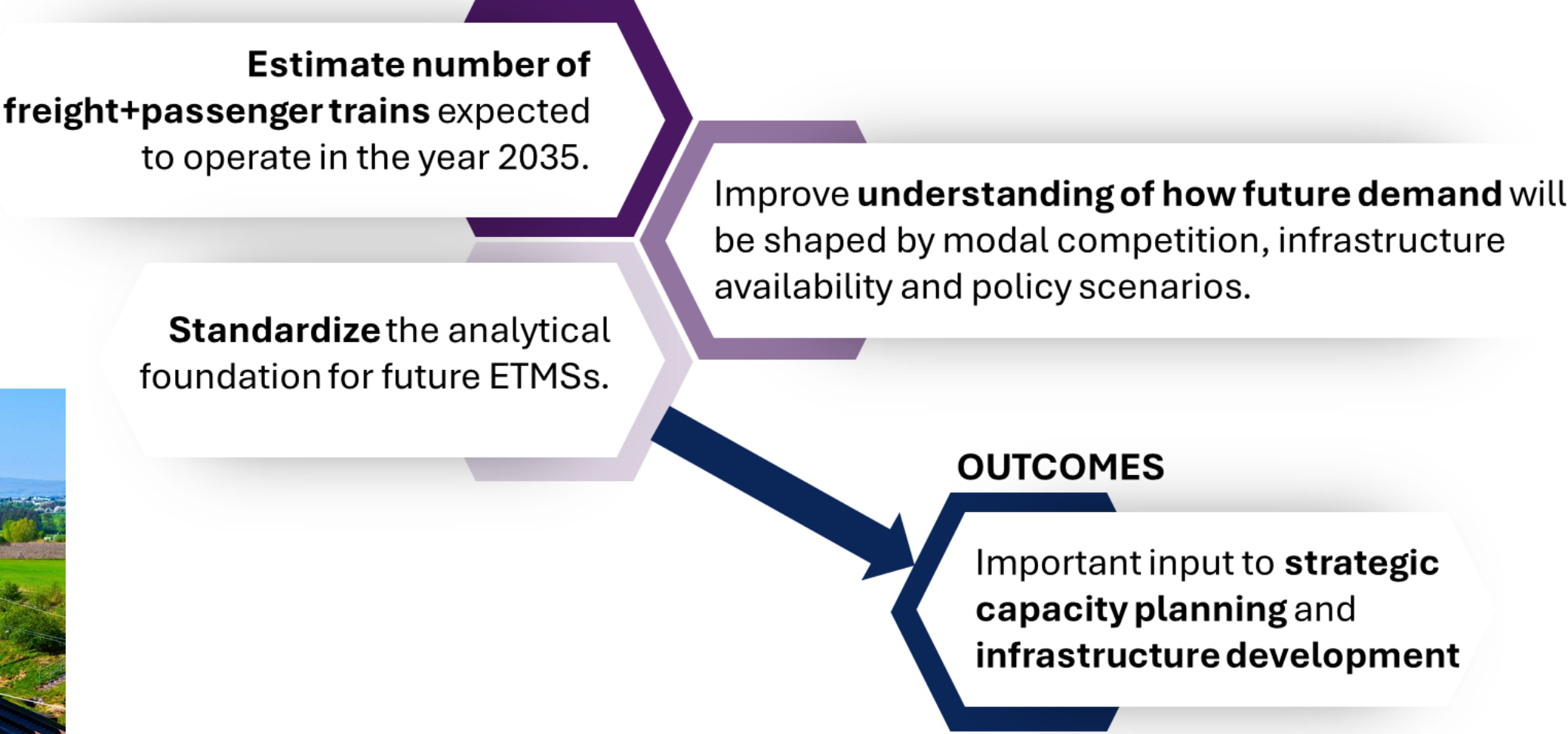
Analysis of expected transport market developments

Infrastructure managers and ENIM shall regularly monitor and analyse transport markets in order to inform their overall business strategy, capacity and contingency management and investment decisions. Infrastructure managers shall communicate the results of this analysis to other stakeholders for similar purposes, including the European Coordinators.

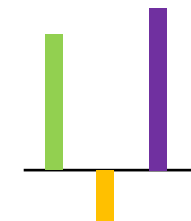
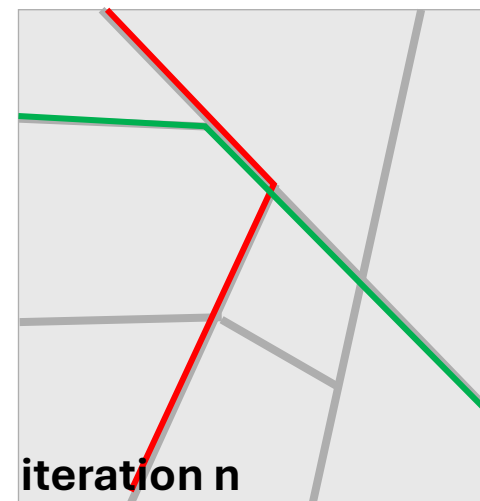
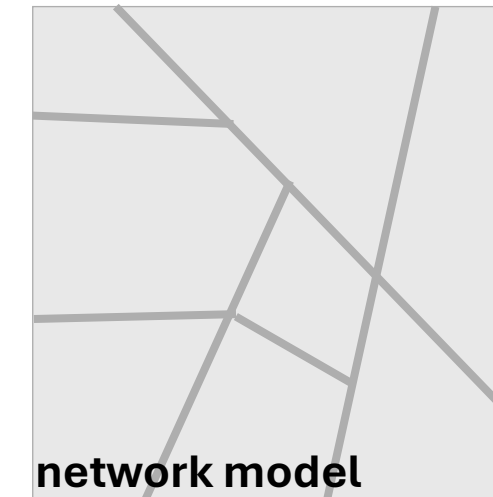
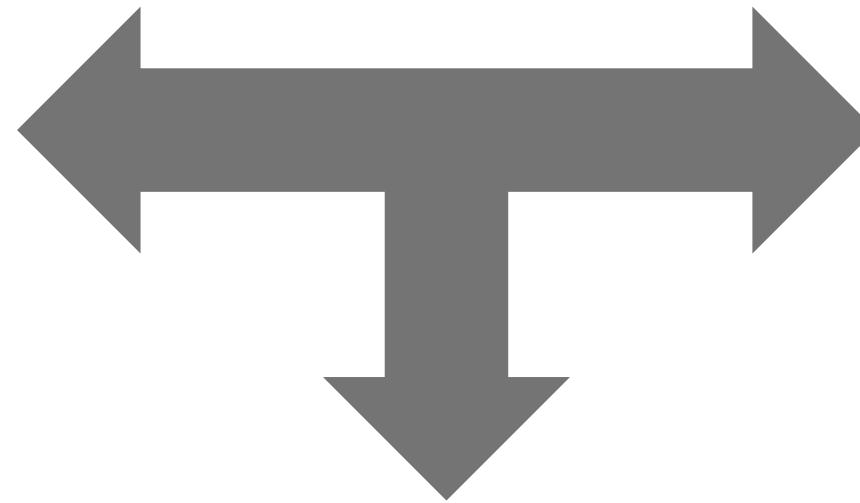
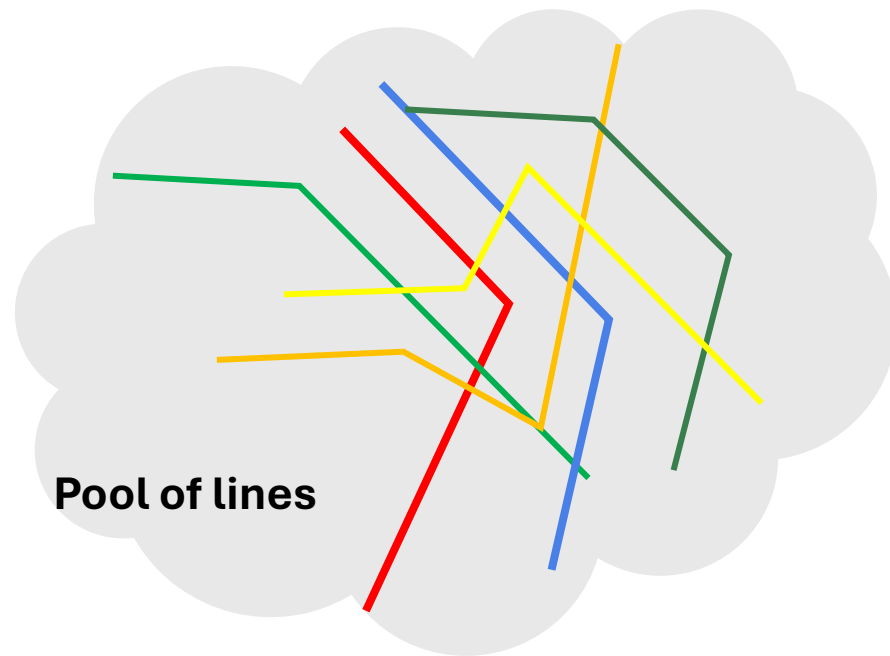
ETMS 2025

Presentation proposal

15 April 2025



ETMS: modelling how the rail market behaves

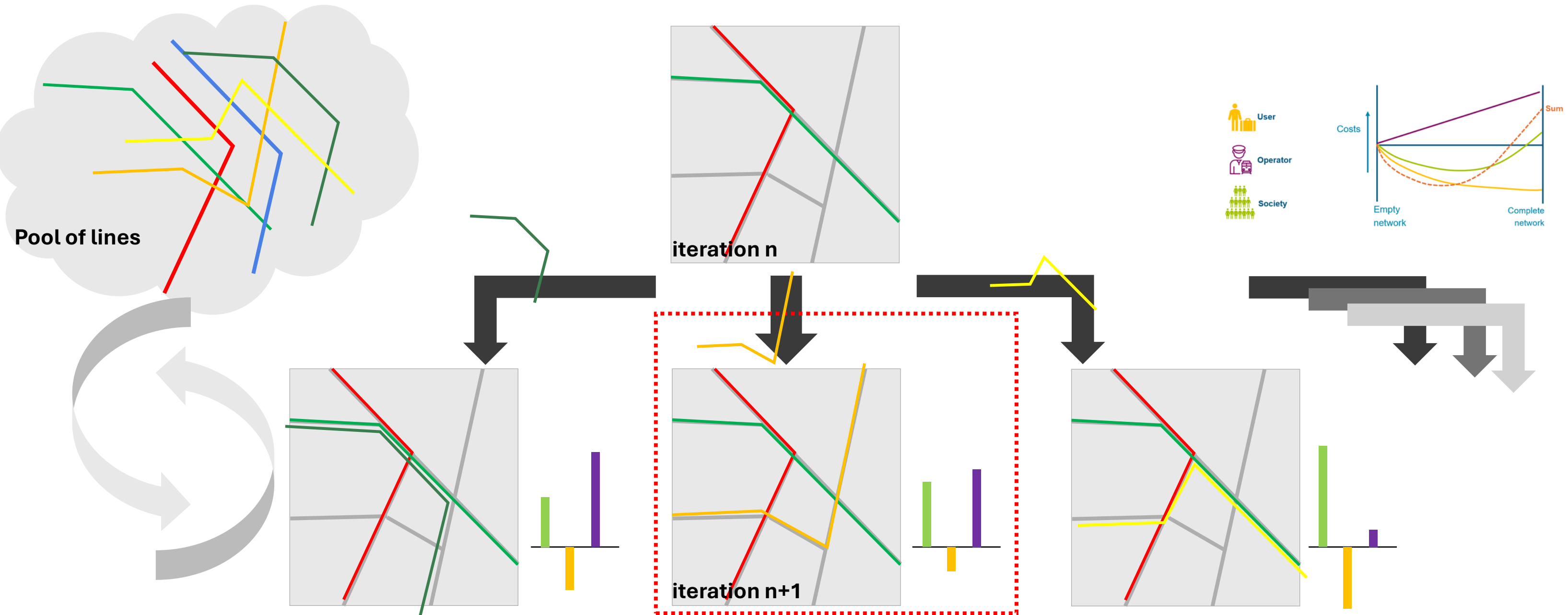


Evaluation by assignment

Based on benefits for:

- passengers
- operators
- society

The iterative approach of ETMS

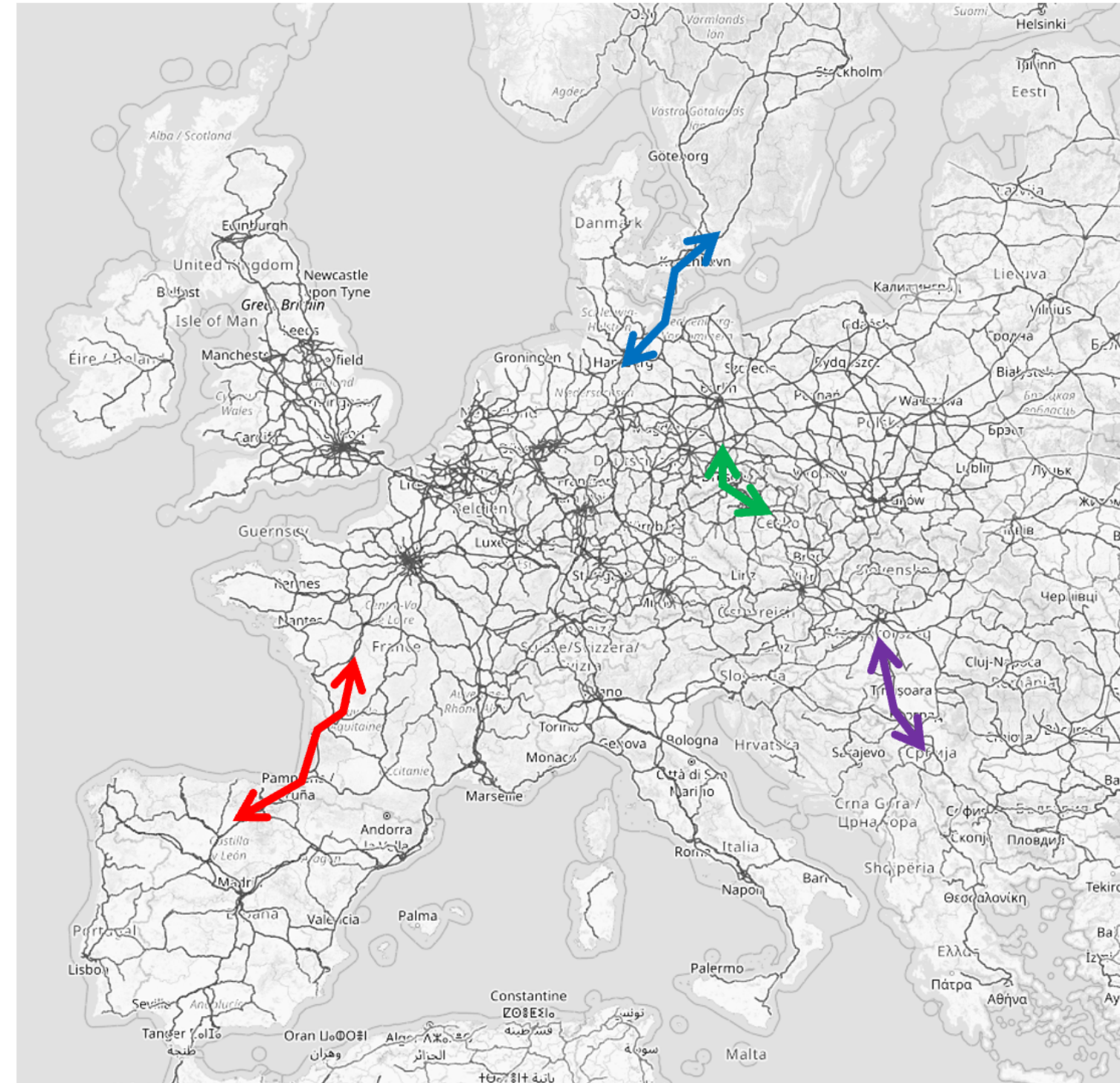


First indicative results – market demand on corridors currently in development

“Proof of concept” market model already underlines business cases of several ongoing major investments

| corridor | market potential after development | current service |
|--------------|------------------------------------|------------------|
| Atlantic | ~2 tph | none |
| Fehmarn belt | ~3 tph | 0,5 tph + |
| Ore mountain | ~2 tph | 0,5 tph |
| Balkans | ~1 tph | 3 trains per day |

All values are long-distance traffic only (no regional trains). Model is still in early stages of development. Results are subject to validation – final results in 2027.

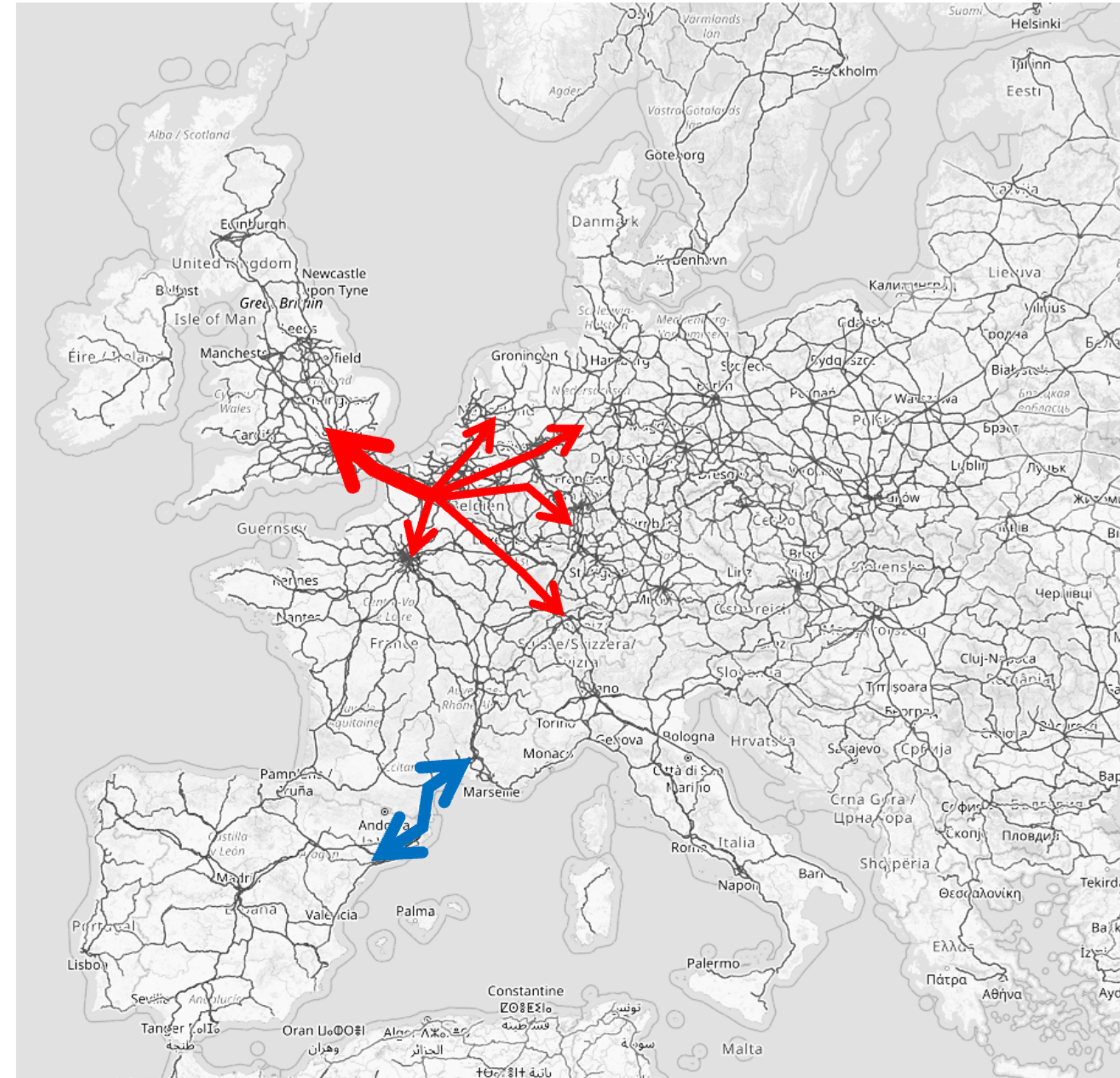


First indicative results – market demand on existing corridors

... however, lowest hanging fruits are the on the already existing corridors!

| corridor | market potential | current service |
|---------------|---|------------------|
| Cross-channel | up to 8 tph Netherlands: ~2 tph Germany North: ~1 tph Germany South: ~2 tph Switzerland: ~1 tph France: ~2 tph | ~2 tph |
| Mediterranean | up to 5 tph France North: ~3 tph France South: ~1 tph Switzerland: ~0,5 tph | 4 trains per day |

All values are long-distance traffic only (no regional trains).
 Model is still in early stages of development.
 Results are subject to validation – final results in 2027.



RAILNET EUROPE

02 EuroLink



Why EuroLink?

- **Long-distance and cross-border rail travel has grown significantly** over the past decade, promising better services, connectivity, and sustainable mobility in Europe.
- Cross-border transport remains underprioritized; Infrastructure Managers (IMs) have yet to fully **optimise capacity** for passengers and freight.
- **National capacity plans** often lack alignment in border regions, limiting efficiency.
- **Infrastructure investments** have not always maximized capacity potential.
- **Enhanced cross-border cooperation and advanced planning** can unlock greater rail network benefits, balancing national priorities.
- Where **demand exceeds capacity**, innovative solutions and targeted investments are key.
- **EU transport policies** now task IMs with capacity pre-planning to boost rail capacity, benefiting passengers, businesses, communities, and the environment.



**Better
connectivity**

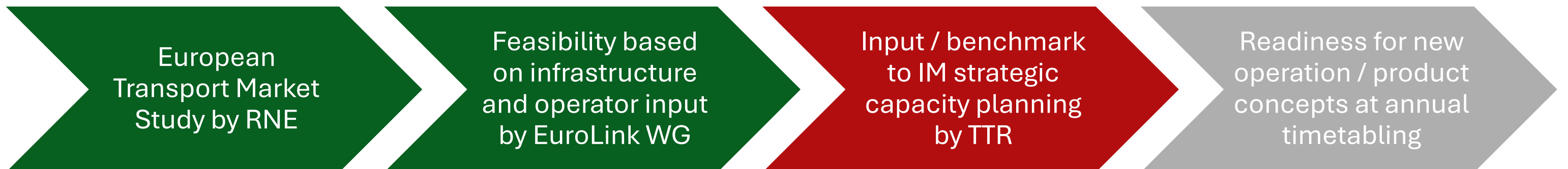


**Sustainable
mobility**



**Optimized use
of infrastructure**

Workflow to Create and Use Capacity Concepts



Traffic flows

A map of Europe showing major rail routes and traffic flows. Key cities include London, Rotterdam, Antwerp, Utrecht, Eindhoven, Dusseldorf, Frankfurt, Cologne, Aachen, Liege, Brussels, Lille, Rouen, Paris, Luxembourg, Saarbrücken, Karlsruhe, Strasbourg, Mannheim, and Heidelberg. Routes are color-coded and numbered.

Capacity Concepts

A technical diagram of a railway track layout. It shows various tracks, platforms, and station names including Wiesbaden Hbf, Frankfurt(M) Hbf, Mannheim Hbf, Heidelberg Hbf, Gießen, and others. The diagram includes track numbers and symbols for different types of tracks.

Capacity Strategies / Models

Capacity strategy of ŽSR for the annual timetable 2027
Zeleznice Slovenskej republiky
TTR
For Smart Capacity Management

Better cross-border trains

A photograph of a yellow and blue high-speed train (TGV) stopped at a station platform. The train is sleek and modern, with the number 3122 visible on its side.

Stakeholder consultation of interested RUs/Applicants via FTE/AllRail/ERFA at all stages

What is in scope (and what not)?

The RNE EuroLink WG is **developing Capacity Concepts** (*ideas on organising cross-border traffic flow in the form of a network of “rough” potential train paths*)

- Legally not binding, „free of commitment“ **reference scenarios**
- On a strategic timescale of 7-15 years
- **Input for IM capacity management and national infrastructure planning**

In Scope

What aspects **are not in scope** of our work?

- Legally mandated strategic capacity planning proposed by the EU Rail Capacity Regulation as this covers a time horizon of only up to 5 years (EuroLink starts 7 years plus)
- Annual/multi-annual capacity and path allocation (EuroLink designs unbiased of applicant or means of path allocation)
- Any aspects not touching our mandate (e.g. market access, ticketing...)

Not in Scope

Our design philosophy

Building efficient and market-oriented timetable concepts by working on 4 axes for passenger and freight traffic



- **Higher frequencies:** cross-border and systemic with potential for growth



- **Short travel times:** improve attractiveness of train paths – needless running time margins to be avoided

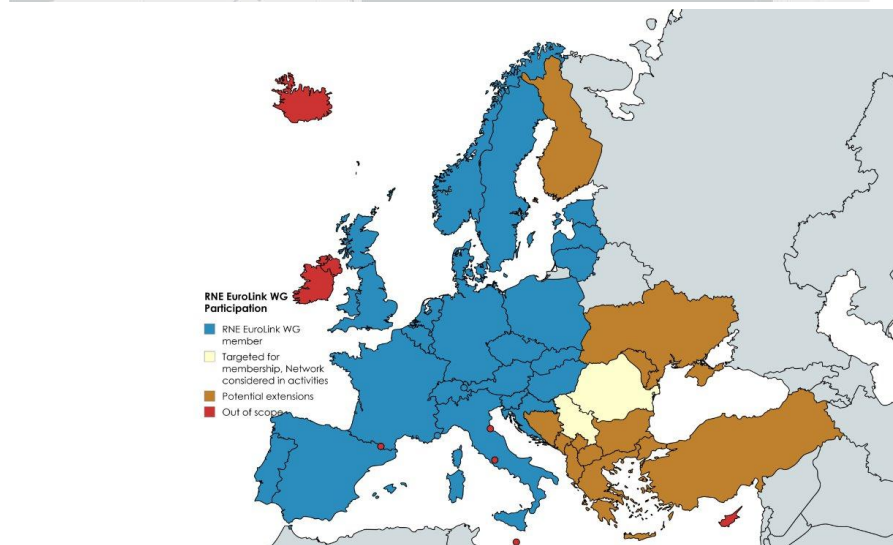
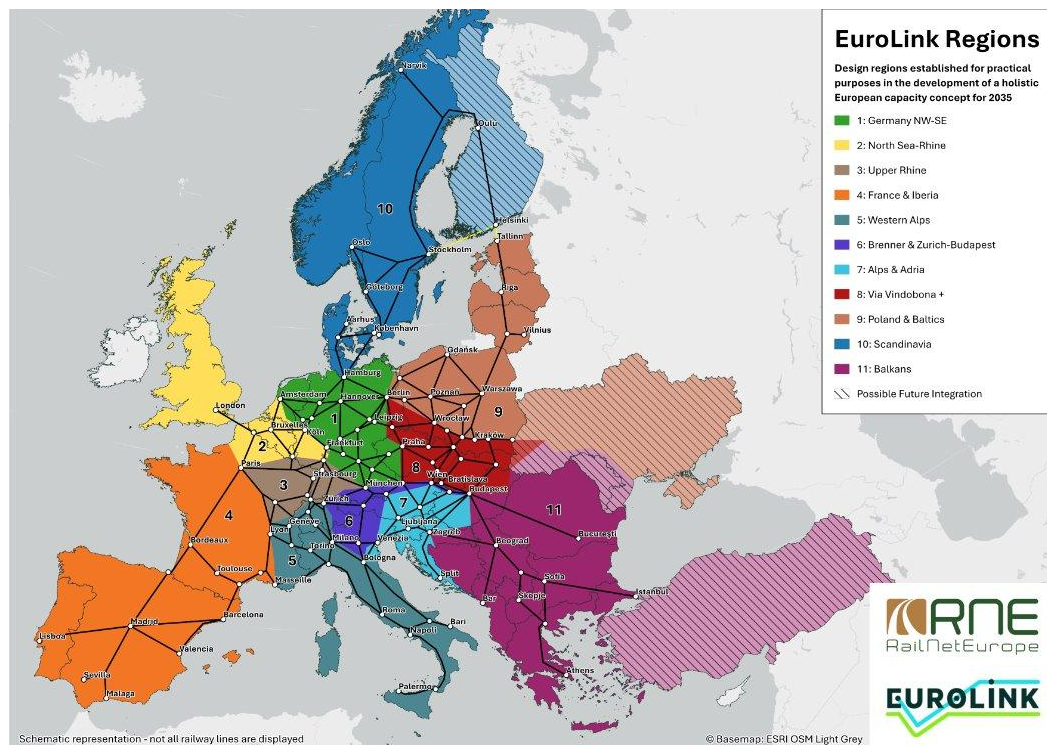


- **Direct connections:** to boost attractiveness for users



- **Optimize transfers:** attractive transfer times in passenger (in addition to direct trains) and freight hubs as well as freight routes with few non-commercial stops and redundancy but with sufficient capacity

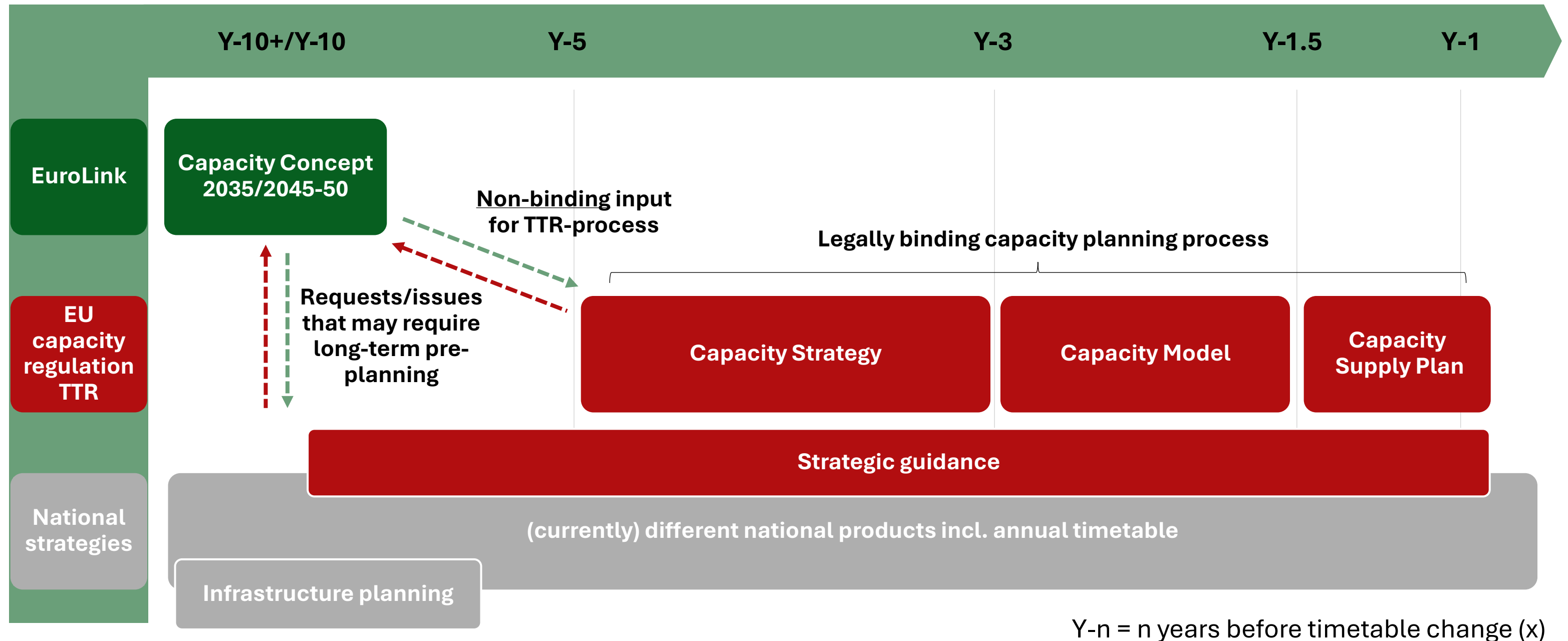
Since January 2025 EuroLink is a working group of RNE



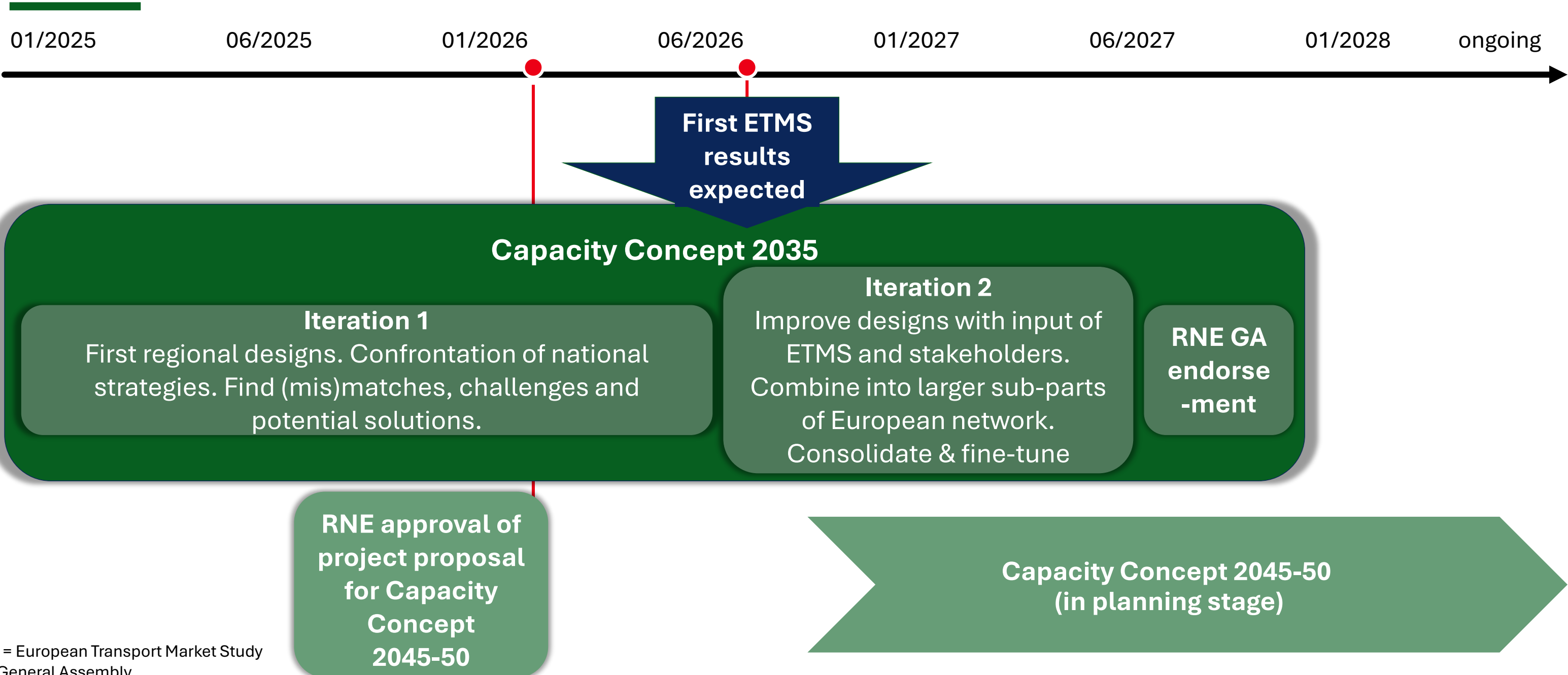
EuroLink is now a working group of RNE with a **common Mission Statement:**

- To **integrate existing national strategic planning frameworks** with an approach of **European added value**.
- To **showcase European benefits of national infrastructure investments** and thus boost commitment to infrastructure funding.
- To **enable RNE and its Members to fulfil challenges from EU institutions / legislation**.
- The **current project “Capacity Concept 2035”** runs **between 2025 and 2027** and aims to elaborate the **first overall Capacity Concept for the European rail network for the reference year 2035. This is non-binding.**
- **“Capacity Concept 2045-2050”** is being prepared (to start 2027).

EuroLink matches national products and the products of the EU capacity regulation (as foreseen). This will be learning by doing.

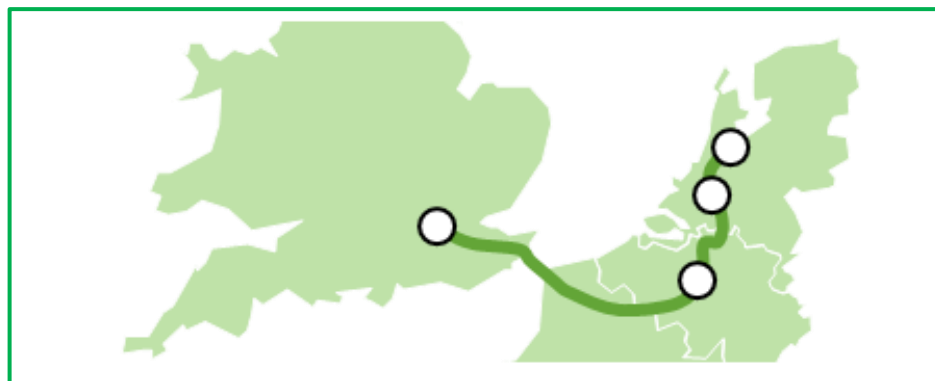


EuroLink's current timeline and framework

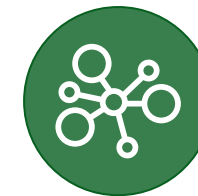


ETMS = European Transport Market Study
 GA = General Assembly

Amsterdam – London: improving rail competitiveness



- London-Amsterdam is the busiest aviation route in Europe which means there's a market for rail too, if we can offer a competitive travel time.
- Complex puzzle to find the optimal route through **4 countries and 5 IM networks**.
- Need for better coordination and alignment and cross-border optimisation.
- EuroLink designs capacity concepts based on a common design philosophy:



- **Before:** International path: slow & suboptimal (>4h30) – national paths not aligned – suboptimal use of infrastructure.
- **Today:** Improvements all over the route led to a possible OD-travel time of 4h17 from London to Amsterdam.
- **EL CC 2035:** More alignment, reconfiguration and optimisation of timetables have resulted in a travel time of 3h53 every hour.

Contact



Matthieu Maeselle

Capacity Concept and TTR Implementation Manager

Co-Chair of the Eurolink Group

+32 499 80 34 45

+43 676 332 18 98

matthieu.maeselle@rne.eu



Marton Spohn

Consultant for Capacity Management

Passenger Traffic

+36 30 3355344

marton.spohn@rne.eu

RailNetEurope

Austria Campus 3

Jakov-Lind-Straße 5

1020 Vienna, Austria

www.rne.eu



CONFERENCE
2026
MAASTRICHT

INTERVIEW: DOUBLING INTERNATIONAL PASSENGERS BY 2030/2035?

“FREEDOM TO STAY, FREEDOM
TO MOVE”



ALBERTO MAZZOLA

CER



ELMER VAN BUUREN

ALLRAIL

“TRANSPARENCY FOR THE
PASSENGER”

epfconference.eu



CONFERENCE
2026
MAASTRICHT

CONCLUDING REMARKS BY JOSEF DOPPELBAUER

CHAIRMAN OF THE NEW SECTOR DELIVERY
GROUP (SDG) OF THE PLATFORM ON
INTERNATIONAL RAIL PASSENGER TRANSPORT
(IRP)



epfconference.eu



WIN

WIN

WIN



CLOSING AND PRACTICAL INFORMATION

CONFERENCE
2026
MAASTRICHT



Now:

16:30-17:30 Drinks

Dinner:



18:30 Doors open

19:00 Start walking-dinner

21:00 Evening ends

Tomorrow:



09:00 Doors open

09:30 Conference starts



epfconference.eu



CONFERENCE
2026
MAASTRICHT

WELCOME

#EPFCONFERENCE2026

Connecting Europeans

epfconference.eu



CONFERENCE
2026
MAASTRICHT

MODERATOR: MARC MAARTENS



epfconference.eu



CONFERENCE
2026
MAASTRICHT

INTERVIEW WITH JOSEF SCHNEIDER

CHAIRMAN OF THE EUROPEAN PASSENGERS'
FEDERATION (EPF)



epfconference.eu



ANNOUNCEMENT BY JON WORTH

CONFERENCE
2026
MAASTRICHT

EUROPEAN RAIL PASSENGERS UNION (ERPU)



epfconference.eu



CONFERENCE
2026
MAASTRICHT

TICKETING AND PASSENGERS' RIGHTS

epfconference.eu



CONFERENCE
2026
MAASTRICHT

KEYNOTE BY ELISABETH KOTTHAUS

HEAD OF UNIT FOR SOCIAL AFFAIRS, PASSENGER
RIGHTS & EQUAL OPPORTUNITIES IN THE
DIRECTORATE-GENERAL FOR MOBILITY AND
TRANSPORT (DG MOVE)



epfconference.eu



Passenger Package



It's simple: *one journey, one ticket.*



The passenger package



Multimodal booking

Scope: B2B and B2C ticketing platforms in all modes

Objective: Establish a level playing field on all ticketing platforms and improve the comparison and visibility of offers in all modes on ticketing platforms, incl. multimodal offers.



Rail ticketing

Scope: Railway undertakings and ticketing platforms

Objective: Ensure that rail travelers can buy one single ticket on one single platform of their choice.



Rail passenger rights

Scope: Passengers and railway undertakings

Objective: Full passenger rights (reimbursement, re-routing, assistance and compensation) for rail travelers missing a connection during a multi-operator journey bought under a single ticket.

A woman in a beige trench coat and dark trousers is walking on a train platform, pulling a black suitcase. In the background, a white high-speed train is stopped at the platform. The platform has a modern, industrial design with blue and grey structural elements.

Multimodal booking

Main measures

- ✓ Obligation for all ticketing platforms to **neutrally** display offers.
- ✓ Obligation for key platforms to respect **fair, reasonable and non-discriminatory** principles when entering into commercial agreements.
- ✓ Member States appoint national authorities to **designate large platforms at national level** and deal with **complaints**.
- ✓ The Commission designates **platforms at EU level**.





Rail ticketing

Main measures

- ✓ **Sharing obligation:** Railway undertakings to share offer with requesting online ticketing services.
- ✓ **Hosting obligation:** Indispensable railway online ticketing platforms to integrate requesting railway undertakings.
- ✓ **Fair contractual conditions:** Fair conditions to be applied to distribution agreements.

Enforcement

National rail regulatory bodies established by the SERA oversee enforcement.





Rail passenger rights

- ✓ **Full set of rights for rail passengers having a ‘single ticket’.**
In case of missed connection between services of different operators, a passenger with a single ticket has these rights:

CHOICE BETWEEN

**Journey continuation/
re-routing** to final destination

**Reimbursement
of the ticket**



ASSISTANCE

Refreshments,
meals,
accommodation.



COMPENSATION

(if ticket is not
reimbursed; for the
whole journey)



Rail passenger rights

- ✓ **Liability for operator** whose delayed/cancelled rail service caused a passenger to miss a connection with another operator's service.
- ✓ Safeguards to **prevent segmenting of single tickets** by operators and third-party platforms to avoid circumvention of rights.
- ✓ **Minimum connection times to be respected** when selling single tickets.





Thank you!





CONFERENCE
2026
Maastricht

PANEL DISCUSSION: TICKETING AND PASSENGERS' RIGHTS



ROBIN LOOS

BEUC



CHIARA TOMASI

Trainline



GEORGIA WHITAKER

T&E

epfconference.eu



CONFERENCE
2026
MAASTRICHT



11:00-
11:30 AM

COFFEE BREAK

#EPFCONFERENCE2026

Connecting Europeans

epfconference.eu



CONFERENCE
2026
MAASTRICHT

CROSS-BORDER PUBLIC TRANSPORT

epfconference.eu



CONFERENCE
2026
MAASTRICHT

KEYNOTE BY MICHAEL DEJOZÉ

DIRECTOR AT EUREGIO MEUSE-RHINE (EMR)



epfconference.eu

50
ans
jahre
jaar



euregio
meuse-rhin
maas-rhein
maas-rijn

provincie
Limburg



Province
de Liège



Ostbelgien



RAZV
Region Aachen
Zweckverband



European Passenger Forum

Maastricht - 6th June 2026

Michael Dejozé

Director, Euregio Meuse-Rhine

EMR: a borderless region



©Eurode Business Center



© Kero.de



© Kero.de



© Kero.de

The Euregio Meuse-Rhine (EMR)

.....A diverse region

- 3 countries (DE, BE, NL)
- 5 partner regions
- 4 million inhabitants
- 3 languages
- 11,000 km²



The Euregio Meuse-Rhine (EMR)

...A region with a borderless economy

- 347,000 businesses + SMEs
- 140,8 billion GDP
- 37,400 cross-border commuters
- In the economic heart of Europe

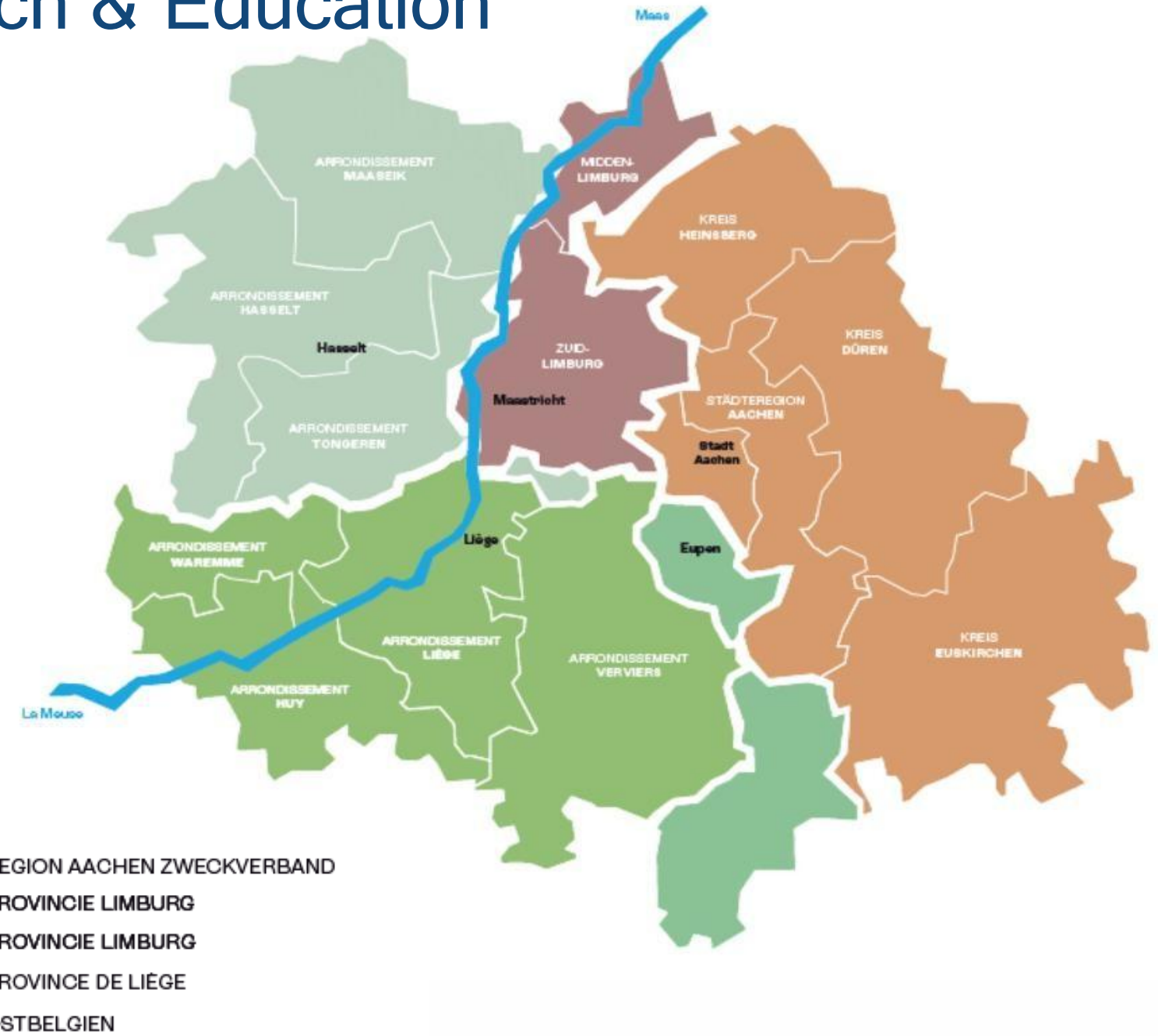


- REGION AACHEN ZWECKVERBAND
- PROVINCIE LIMBURG
- PROVINCIE LIMBURG
- PROVINCE DE LIÈGE
- OSTBELGIEN

The Euregio Meuse-Rhine (EMR)

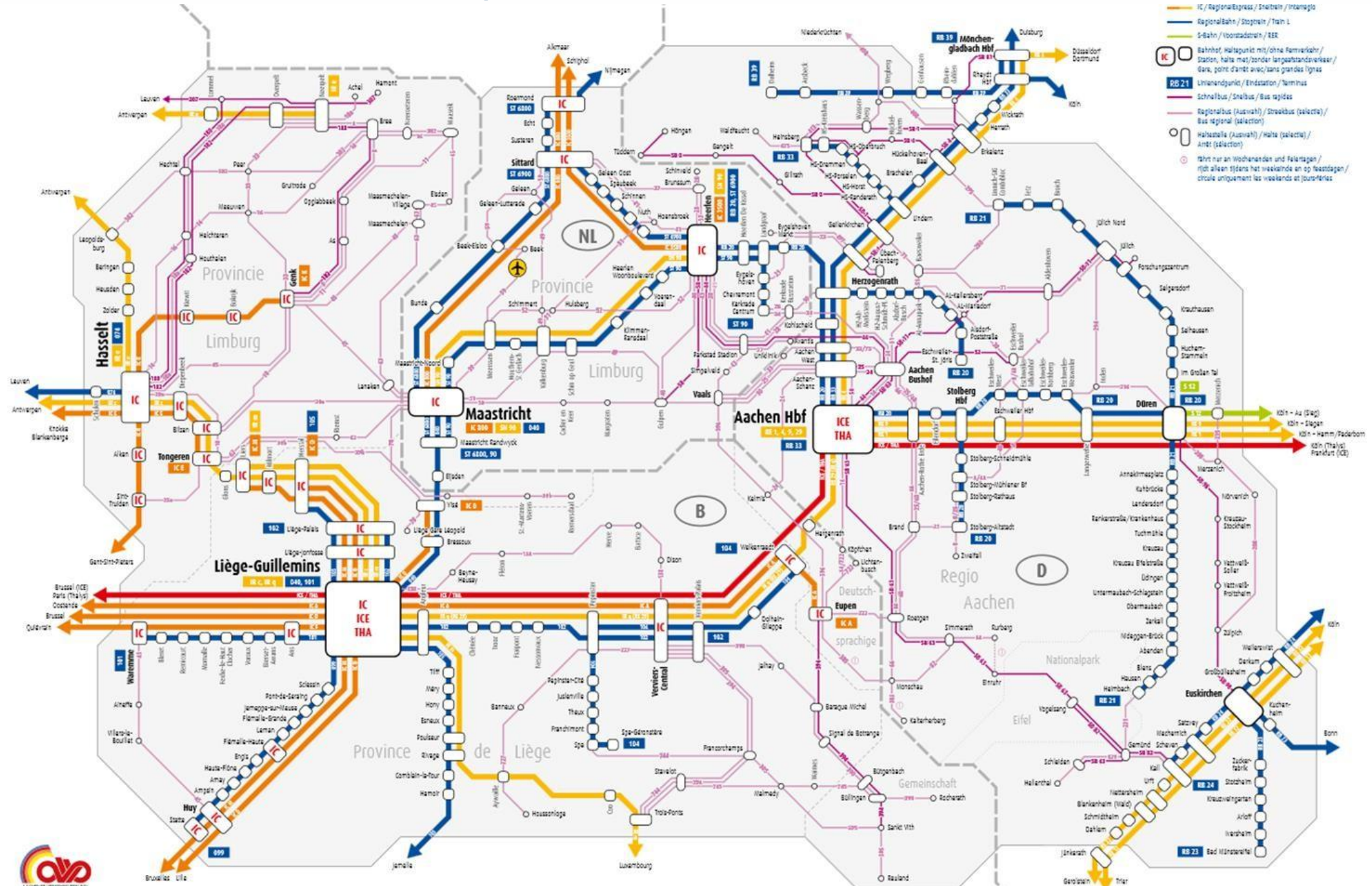
...A region with borderless Research & Education

- 5 universities
- 11 colleges/schools for applied sciences
- 205.242 students



The Euregio Meuse-Rhine (EMR)

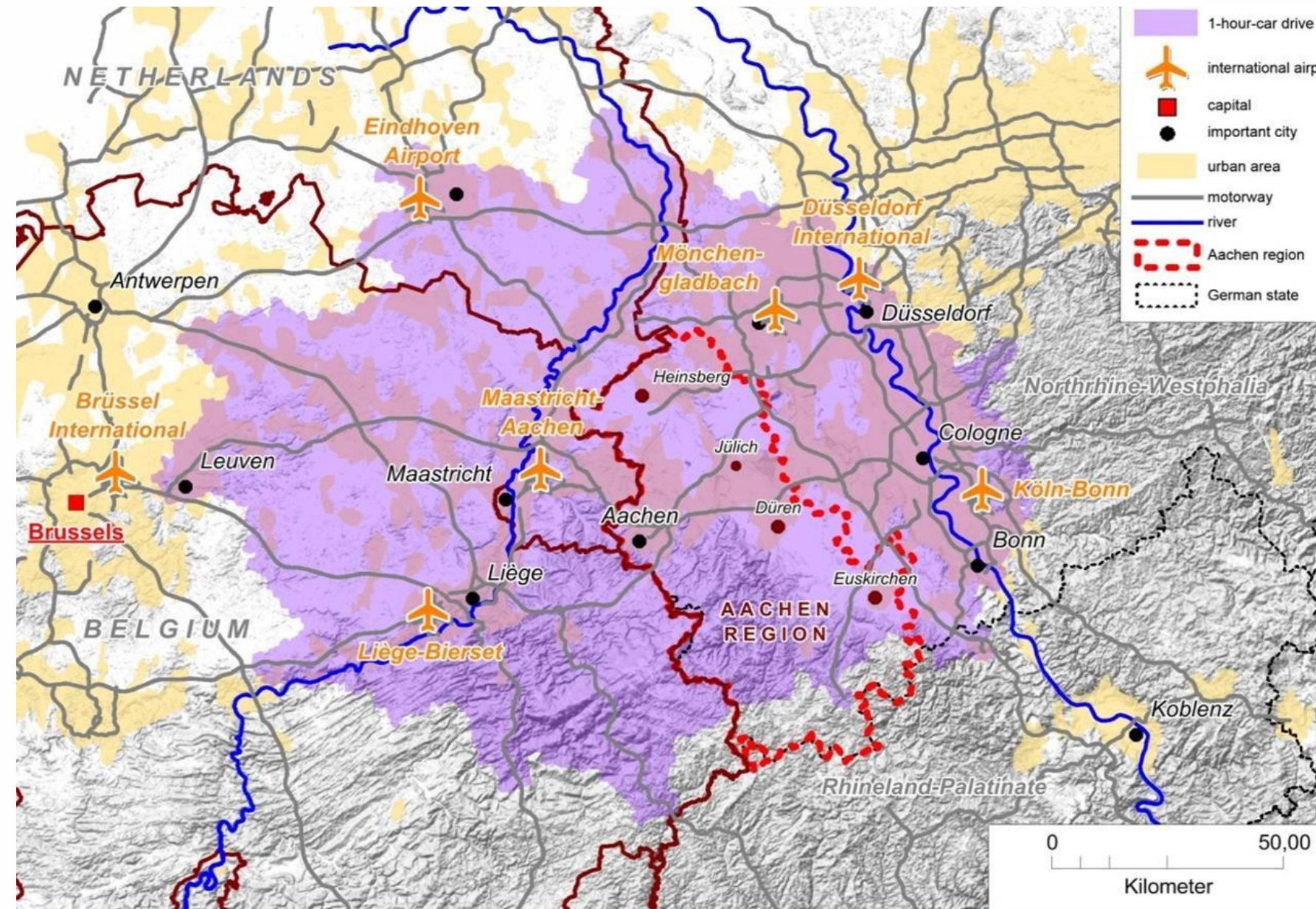
.....An interconnected region



The Euregio Meuse-Rhine (EMR)

...An interconnected region

- Liège - Aachen : **50 min**
- Liège - Maastricht : **40 min**
- Maastricht - Hasselt : **40 min**
- Eupen - Aachen : **30 min**





Interconnection without borders: why is this relevant?

- Cross-border commuters
- International and euregional student exchanges
- Leisure and tourism

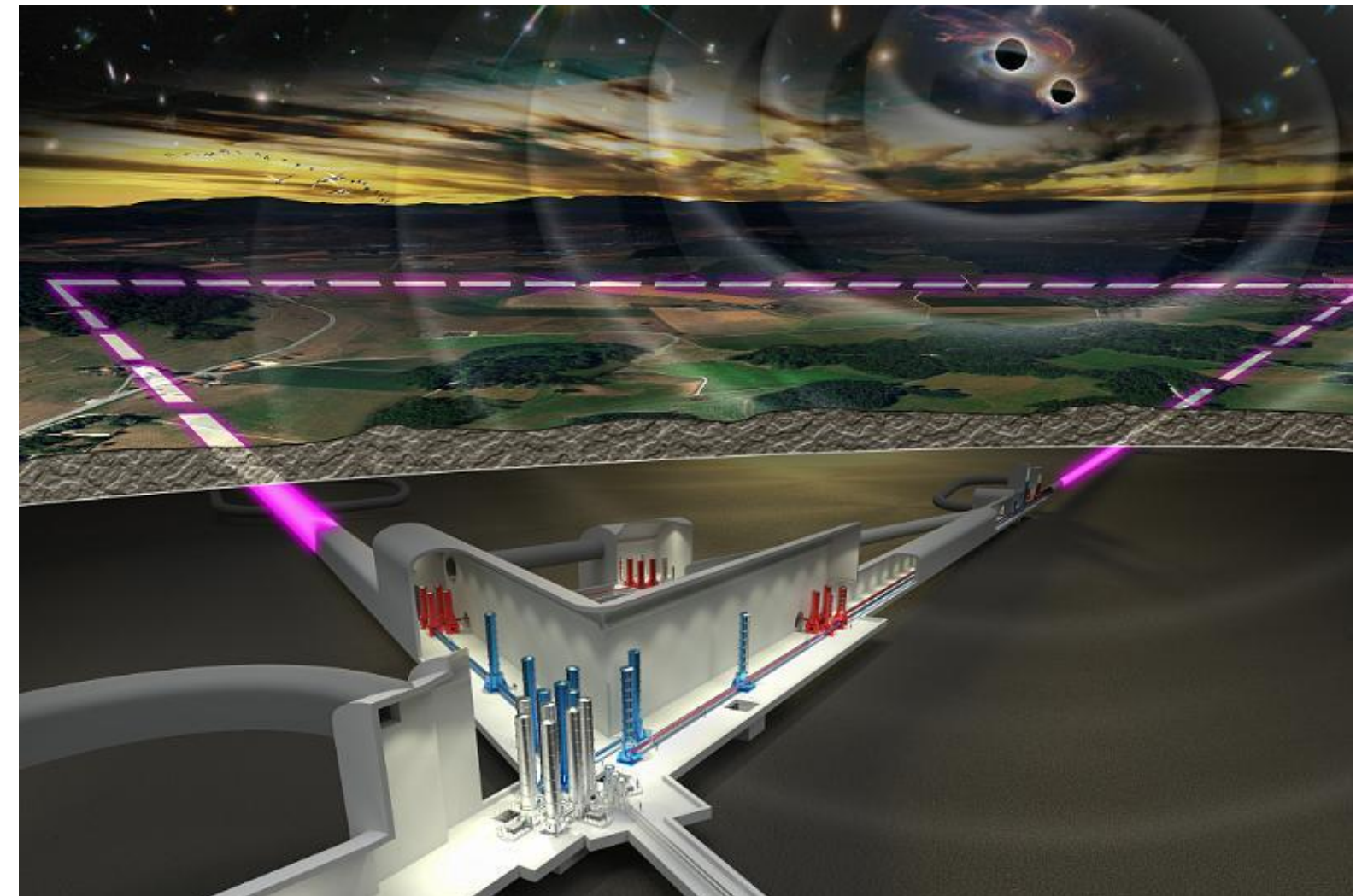
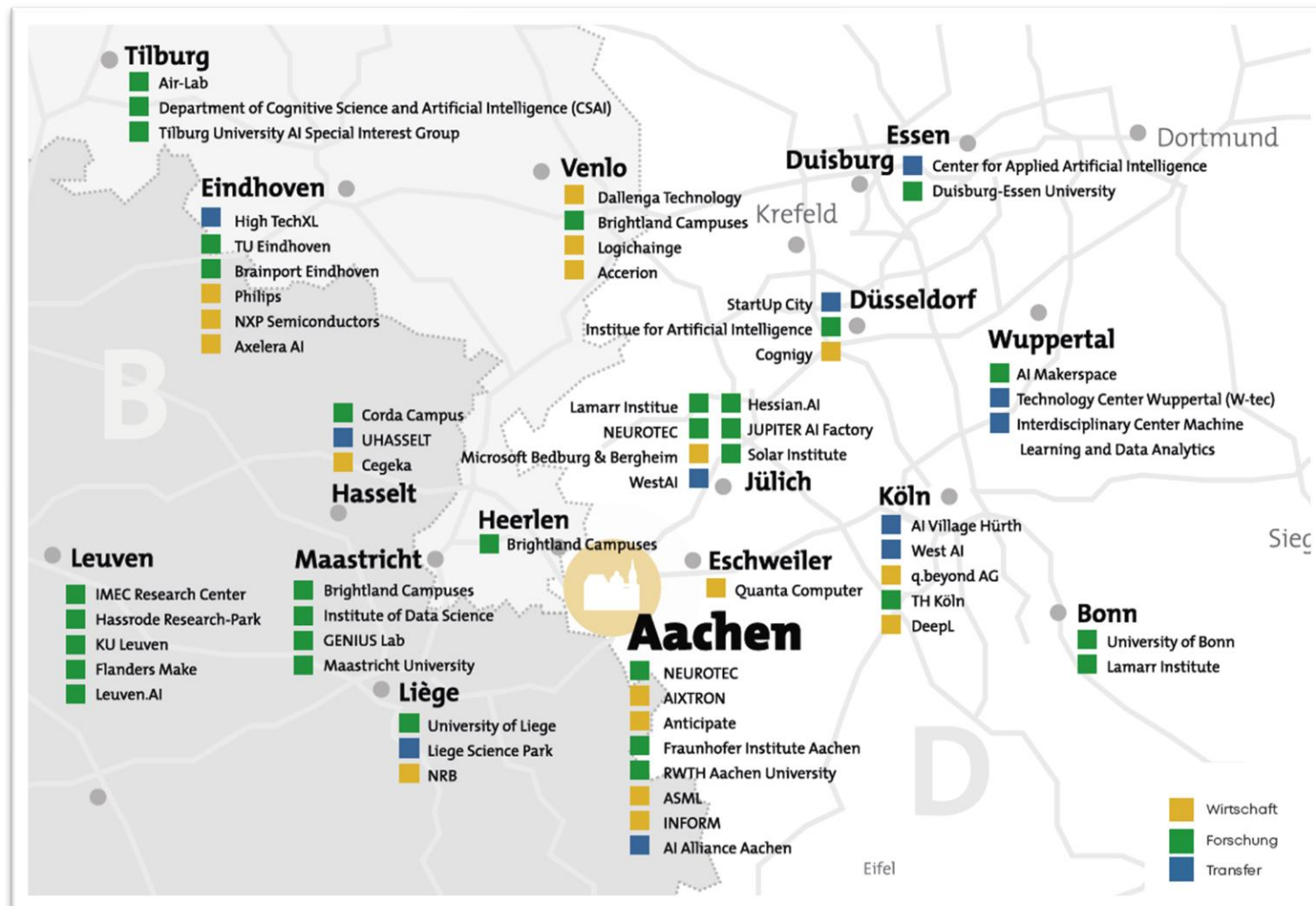
© AVV/Smilla Dankert

Interconnection without borders: why is this relevant?

- Cross-border commuters
- International and euregional student exchanges
- Leisure and tourism



A few examples...





Without commitment, you'll never start. But more importantly, without consistency, you'll never finish.

-Denzel Washington

info@euregio-mr.eu

www.euregio-mr.eu



CONFERENCE
2026
MAASTRICHT

KEYNOTE BY CHELLIE SOONS

REGIONAL DIRECTOR AT ARRIVA LIMBURG



epfconference.eu

Bridging borders

Arriva in Limburg
by Chellie Soons - Regional Director





CONFERENCE
2026
Maastricht

PANEL DISCUSSION: CROSS-BORDER PUBLIC TRANSPORT



ELISABETH KOTTHAUS

DG MOVE



DOMINIK ELSMANN

AVV



PETER MEUKENS

TreinTramBus/EPF



VINCENT DOUMAYROU

**Réseau #enTrain
Europe/EPF**

epfconference.eu

EPF conference 2027

Welcome to the center of Central Europe
June 4th and 5th, 2027.

06.06.2026

www.pro-bahn.de

Welcome to the center of Central Europe

EPF conference 2027 in Zittau



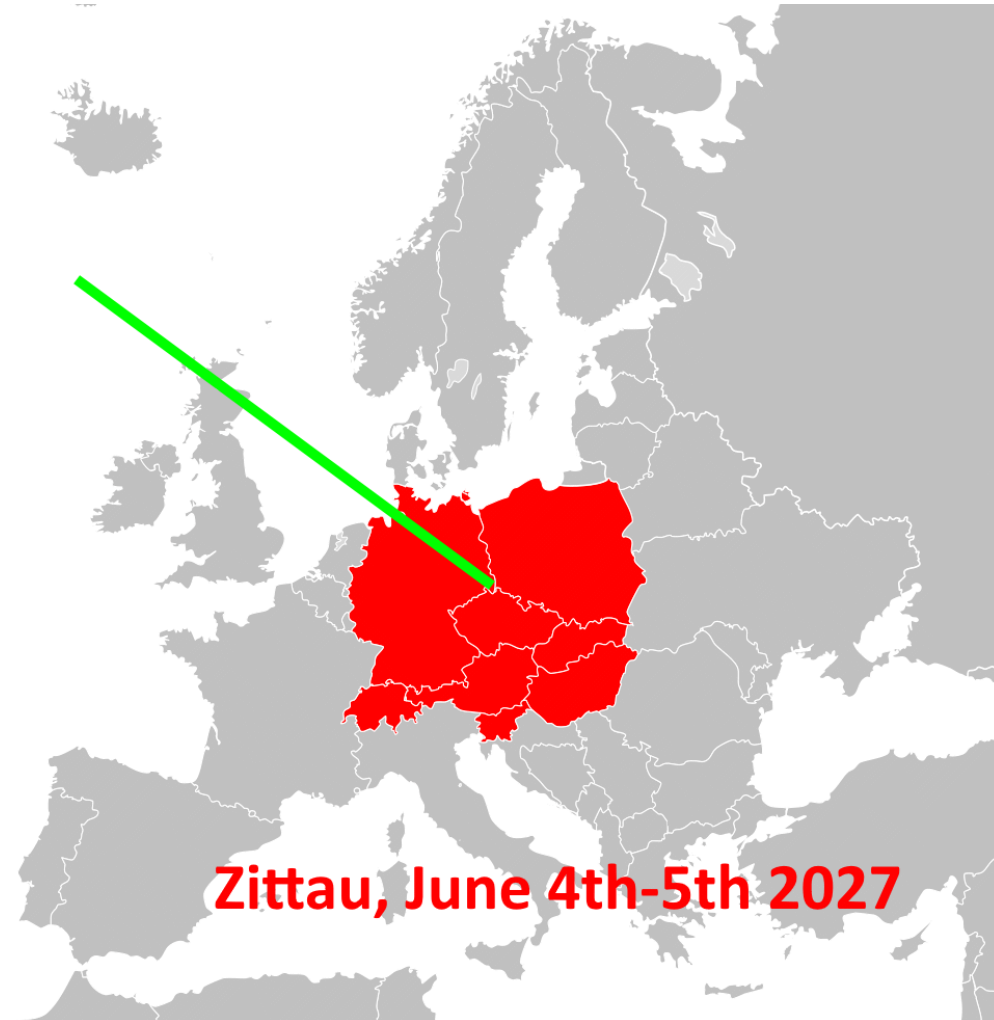
Located in the Euroregion Neisse – Nisa – Nysa, the tripoint between DE, CZ and PL.

Well connected by rail

- from BER via Cottbus and Görlitz (hourly)
- from WRO via Görlitz (two-hourly)
- from DRS via Dresden (hourly)
- from PRG via Liberec (Bus Praha – Liberec is faster) (hourly)

Main Operator: Trilex www.laenderbahn.com/trilex

Local transit information: www.zvon.de/de/fahrplanseiten



SVG trace of PNG of the same name. Original PNG based on CIA map The World Factbook (https://commons.wikimedia.org/wiki/File:Central_Europe_(Brockhaus).svg), https://creativecommons.org/licenses/by-sa/4.0/legalcode

Venue

EPF conference 2027 in Zittau



Bürgersaal im Rathaus / Citizens' Hall at City Hall



Pivovar / brewery Kocour Varnsdorf (CZ)

Impressions

EPF conference 2027 in Zittau



Manecke ([https://commons.wikimedia.org/wiki/File:Rathaus_\(Zittau\).jpg](https://commons.wikimedia.org/wiki/File:Rathaus_(Zittau).jpg)), „Rathaus (Zittau)“, <https://creativecommons.org/licenses/by-sa/3.0/legalcode>



Contact

EPF conference 2027 in Zittau

Jörg Bruchertseifer:

joerg.bruchertseifer@pro-bahn.de

Michael Koch:

michael.koch@mitteldeutschland.pro-bahn.de



Source: <https://www.zvon.de/de/euro-neisse-region?file=files/media/zvon/liniennetz/euro-neisse-region/2025/euro-neisse-linienverzeichnis-ent-2025-dt-cz-pl.pdf>



CONFERENCE
2026
MAASTRICHT

MAASTRICHT MANIFESTO FOR INTEGRATED, SUSTAINABLE AND INCLUSIVE MOBILITY

- 1. Make public transport more user-friendly, attractive and reliable**
- 2. Facilitate integrated and well-connected end-to-end journeys**
- 3. Ensure that public transport is inclusive and accessible to all**
- 4. Make sure that sustainable options are affordable, visible and price-competitive**
- 5. Make public transport a priority with stable long-term investment funding**

epfconference.eu



CONFERENCE
2026
MAASTRICHT



**13:15-15:00 #CrossBorderRail walking tour - the future of the Maastricht -
Lanaken - Hasselt line**

Now:

A packed lunch will be provided upon leaving!

Jon Worth (initiator of the #CrossBorderRail project), and Jan Lemmens (local Rover volunteer) will lead a walking tour to the railway bridge over the Maas, via the historic centre of Maastricht and along the Maas. Come along for a relaxed walk in the sunshine, and discussion about the future of the rail line and the railway bridge. Time: c. 90 minutes, 5 kilometres walk

epfconference.eu



CONFERENCE
2026
MAASTRICHT

CLOSING

#EPFCONFERENCE2026

Connecting Europeans

epfconference.eu