

The Consumer Voice in Europe

## RAILWAY TO (CONSUMER) HEAVEN

BEUC report on an "EU Masterplan for Rail"



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## Why it matters to consumers

Taking the train is a daily routine for many consumers, but it is certainly not yet a reflex for everyone when comparing with the predominance of car journeys. And for longer trips, the plane remains the go-to choice for many. That is because there are many barriers to modal shift, ranging from timetable coordination of railways or investment capacity to very practical issues such as comfort, frequency, and ticket prices. By focusing on improving the quality of rail service beyond the rationale of simply calling for large-scale investments, the EU and Member States will encourage more consumers to prefer the train every day, ultimately making the train more competitive and attractive vis-à-vis other transport modes.

## The policy measures of an “EU Masterplan for rail”

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### The quick fixes

- Make cross-border rail options visible and available to consumers
- Adopt truly effective cross-border passenger rights
- Promote healthy competition between rail operators and a greater rail offer for consumers
- Improve rail timetables and their coordination for cross-border trips

### The ambition for the next Commission mandate

- Set the rules for railway operators and platforms – establish an EU-wide passenger protection policy for consumers taking the train
- Engage with Member States – coordinate, enforce, and learn from each other
- Bring creative financing in – facilitate the purchase and lease of rolling stock
- Make it work – empowering the European Railway Agency
- Go beyond rail – develop urban nodes, connecting hubs and an integrated mobility offer around train stations

### The long-term planning (to prepare now)

- Make more funds available for the completion of the TEN-T network and ensure Member States commit to it
- Prepare a massive investment plan for a consumer-friendly rail system

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## Introduction: is rail all about investment?

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Making rail more attractive than the car and the plane for medium and long-distance trips is a multi-faceted equation. The need for greater investment in infrastructure (such as new high-speed lines) and rolling stock is often presented as the go-to answer to solve the problems of the EU rail network. As consumer organisations, we do subscribe to the need for more investment in rail. But it is not the only factor to consider, indeed far from it.

Because when consumers talk about rail<sup>1</sup>, their discussions revolve around more practical concerns. This includes greater comfort, frequency and range of timetables, attractive prices, the ability to take their bikes on board and find a seat for the whole family, services at stations or on trains, and the possibility to combine their journey easily with other transport modes. They also complain about the poor application of what they legitimately consider their passenger rights. All of these go beyond the “more investment” narrative.

A similar pattern concerns cross-border journeys by train, where any announcement of new high-speed connections or the reintroduction of night train services might certainly create enthusiasm, if not intense debates on the right level of investment needed to sustain these routes. But here again, more than at national level, there are multiple barriers to a decent consumer experience: poor timetables, complex booking and ticketing processes, long or non-existent connections, prices that are too high compared with air travel, passenger rights not protective enough and/or not correctly enforced, etc.

### The determinants of modal shift are to be found in consumers’ needs

A modal shift from cars and planes to rail (and public transport) is a *sine qua non* condition to mitigating the climate crisis.<sup>2</sup> Electric cars, although they bring financial benefits to consumers,<sup>3</sup> will not solve it all. Planes will have a very hard time decarbonising in the appropriate timeline to respect our climate goals.<sup>4</sup> All this while transport demand is set to increase.<sup>5</sup> The recent 2040 Climate Target Communication also makes it clear that the use of cars and planes is on a growing trend in a current policy scenario,<sup>6</sup> with transport being on track to represent close to 50% of the EU’s total greenhouse gas emissions by 2050.<sup>7</sup> **There is therefore no scenario where modal shift can be ignored in the policy portfolio.** The good news is that a consumer-oriented policy on a modal-shift to rail is a win-win for climate and consumers.

There are many determinants to the realisation of a modal shift, but the questions surrounding the convenience of rail are key factors to consider, whether they are linked to instrumental, symbolic, or affective aspects.<sup>8</sup> While some of these aspects (“is the train trendy?”, “what is my feeling about comfort, safety, ...”) are hard to quantify, they must

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<sup>1</sup> Eurobarometer (2018), [Survey on passenger satisfaction with rail services](#), consulted on 15 March 2024.

<sup>2</sup> We explore the potential of modal shift in reducing transport emissions in [our position paper](#) on the Multimodal Digital Mobility Services Initiative.

<sup>3</sup> See our [Total Cost of Ownership \(TCO\) studies](#) on the cost of electric cars in Europe.

<sup>4</sup> EASA Environmental report 2022, [Executive Summary and Recommendations](#), page 7.

<sup>5</sup> European Environment Agency, [Transport and environment report 2021](#).

<sup>6</sup> European Commission (2024), Climate Action, [2040 Climate target](#), consulted on 15 March 2024.

<sup>7</sup> Transport & Environment (20 March 2024), [Europe’s transport sector set to make up almost half of the continent’s emissions in 2030](#), consulted on 15 March 2024.

<sup>8</sup> See The Shift Project (2022), [Voyager bas carbone](#), pp. 88-89. Instrumental aspects relate to objective characteristics of the transport mode (travel time, frequency, costs...). Symbols relate to the social representations and affective aspects are linked to the emotions provided by the transport mode in question.

be addressed altogether in both a global policy framework and a positive narrative around rail.

Against this background, BEUC and its members have decided to deep-dive in the convenience of railways in Europe, looking at both domestic and cross-border routes and how consumer experience can be improved to contribute to this necessary modal shift.

### **BEUC research identifies consumer needs when taking the train**

Our research focuses on the analysis of railway systems starting from 11 European countries: Austria, Denmark, France, Germany, Greece, Hungary, Italy, Portugal, Slovenia, Spain, and the Netherlands. To allow comparison, BEUC and its members<sup>9</sup> have developed an analysis grid. The first entry of the grid considered the following parameters:

- Travel and train categories: national and cross-border high-speed trains<sup>10</sup>, national and cross-border regional trains<sup>11</sup>, and night trains. (Some countries do not have high-speed or night trains);
- Specific routes for each travel and train categories representative of journeys undertaken by commuters or occasional passengers.

For each category and route identified, we then categorised issues of importance for a consumer-friendly rail system:

- Frequency;
- Ticketing (format, transferability, combination with other modes, booking process);
- Price and special offers;
- Passenger rights;
- Flexibility and convenience;
- Level of service on board (possibility to hop on with a bike, suitability for families or people carrying large luggage, accessibility, access to Wi-Fi, possibility to eat, ...)

These parameters form a double entry table which we applied to each country, offering a methodological approach for analysing the national rail systems while leaving room for real-life consumer experiences to be reported. BEUC members also added concerns reported by consumers retrieved from their daily work (via consumer complaints for example) or when conducting this research.

The findings presented below obviously constitute a set of anecdotal evidence rather than scientific research on the state of European railways. They should be considered as a 'snapshot' of the state of the EU's rail systems, taking into account the qualitative and non-exhaustive aspect of this work. However, we showcase the reality of consumers' experience when taking (or trying to take) the train in their country, be it for daily commute or occasional, sometimes cross-border journeys. As such, this refocuses the debate on the passenger's needs, pointing at concrete action to be taken in the short term.

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<sup>9</sup> Our members involved in this project are ArbeiterKammer, Forbrugerrådet Tænk, UFC Que-Choisir, Verbraucherzentrale Bundesverband, EKPIZO, Tudatos Vásárlók Egyesülete, Adiconsum, Altroconsumo, Associação Portuguesa para a Defesa do Consumidor, Zveza Potrošnikov Slovenije, Federación de Consumidores y Usuarios, Organización de consumidores y usuarios, Consumentenbond.

<sup>10</sup> A high-speed train runs on a track built specially for high-speed travel or specially upgraded for high-speed travel, at a minimum speed of 250 km/h on lines specially built for high speed *and* of about 200 km/h on existing lines which have been specially upgraded. This must apply to at least one section of the line.

<sup>11</sup> Regional trains are trains connecting one city to another, therefore excluding intra-city train services.

## Main findings – analysing EU rail systems reveals a complex picture

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Is there such a thing as a “perfect” rail system? One does not need to be a rail expert to know that the answer is no. What is particularly striking about the evidence and comments from BEUC members is the clear lack of harmonisation of consumer service on national rail networks, be it for long or short distance. The problems and instrumental, symbolic, or affective aspects of rail vary from country to country and from one railway company to the other. Some national rail systems also offer levels of service in certain respects that could inspire other countries or be supported and extended on a European scale.

When going through the national realities with our analysis grid, our aim is to reveal the potential to improve the consumer-convenience of rail with the current infrastructure, and without massive amount of public money spent on ‘shiny’ initiatives. We therefore put these realities next to each other to then define what can be described as a consumer-friendly rail system. We also highlight striking examples (‘the bad’ and ‘the good’) and further explore the categories with other examples from our members.

### Frequency of long-distance/high-speed rail services

**The bad:** Athens-Thessaloniki is one of busiest domestic flight routes of Europe with around 15 round trips per day. Yet, there are only a few rail connections (four regional and two high-speed trains) throughout the day, without any option to stay late or arrive early at the destination. What is more, the price is not really competitive with air. Finally, the high-speed line (an example of the state of the Greek rail system) is not yet fully compliant with the highest standards of the European Train Control System and its speed is limited.

**The very good:** Rome-Milan provides much better frequency of services (every 10 to 15 minutes) with departures reasonably early when considering the distance between these cities (between 05.30 and 20.30).

### **The mixed picture:**

- *Denmark vs the Netherlands* – Most long-distance trains in Denmark run from 05.00 to midnight but show poor frequency. The Fredericia- Sønderborg connection only runs every two hours, despite competing time-wise with a journey by car. On the other hand, the only ‘long-distance’ high-speed rail in the Netherlands between Amsterdam and Rotterdam runs five times per hour throughout the day.
- *Germany vs France* – High-speed connections in Germany (we tested Hamburg-Munich, Berlin-Cologne and Berlin-Hamburg) are quite regular. In comparison, French railways can be rather disappointing, notably on the Bordeaux-Tours line: there are only two direct connections after 13.00 and the last train leaves Tours very early. Spending the early evening in a city and coming back later is not an option.
- *Portugal vs Austria* – Although competing with the car in terms of travel time, Portuguese railway offers quite poor high-speed connections between its major cities: from Lisbon, there are only two and four direct round trips per day with Faro and Braga. What is more, these are marginally faster than slower trains: for instance, compared to the “*Intercidades*” (a long-distance train for the Lisbon-Braga route), they are only 26 minutes faster. In Austria, a similar route between Wien and Innsbruck has 23 connections from two companies.

- *Spain vs Slovenia* – The very busy Madrid-Barcelona route shows how competition can work for consumers with almost 50 trains per day and new operators deploying their offer, largely competing with planes and cars. On the other hand, the Slovenian willing to join the seaside can rely on the Ljubljana-Koper train connexion only four times a day with many stopovers, making it uncompetitive with cars. The Italian company Trenitalia does run two trains a day to reach Trieste from Ljubljana but with the same result.

## Frequency of regional trains

**The bad:** Spain faces challenges to connect cities around Madrid where high-speed lines do not exist. The notion of “regional” trains can be tricky as it could mean routes such as Madrid-Salamanca or Madrid-Cáceres with rather long distances to cover. But the truth is that these lines are not regularly served, to say the least (between seven and ten trains per day). The picture is not much better considering much shorter routes such as Malaga-Granada or Murcia-Alicante. This is despite travel time being very competitive with cars.

Greece’s regional train connections are simply too poor. With the Athens- Halkitha connection running a mere ten times per day, Greece simply *“does not currently have fully functioning regional routes”* according to our member EKPIZO.

**The very good:** Germany’s regional trains are the clear contenders for being a standard-bearer of a reliable, efficient rail system at regional level. The Cologne-Dusseldorf route offers 61 trains on weekdays, well-spread throughout the day and night. Similar frequency can be found for Munich-Augsburg or Hannover-Braunschweig.

Other commuting trains do perform extremely well across Europe. For example, between Budapest and Vác, there are roughly 100 round trip connections per day with one train every ten minutes, basically running all day with only a three-hour time-gap between 01.00 and 04.00.

***“There are two different types of short distance trains between Cologne and Dusseldorf: Regionalbahn (Regionaltrain) and S-Bahn; the travel time with S-Bahn between the two cities is around 20 minutes longer than the Regionalbahn and is not even considered as part of the 61 train connections!” – vzbv (Germany)***

## The mixed picture:

- Some marginal improvements can also be reported. For example, *“not so long ago, there was only one regional train a day in each direction between Lisbon and Caldas da Rainha,”* our Portuguese member DECO notes. Even though there are now three connections per day, it is certainly not at the expected level.

## Ticketing, multimodality and pricing

Price is a difficult element to assess for such research. Several factors come into play to determine the price of a train ticket. And while we will explore some solutions to reduce it in our recommendations, we are not calling for a flat reduction of the price.

Rather, our intention is to highlight some good practises that go beyond the front-facing ticket price, such as discounts, flexibility, integration with other transport modes, and of course accessibility of tickets on multiple platforms.



**The bad:** Ticketing is the pain point across many countries. Admittedly, there is some integration at national level where a multimodal system has been put in place. And yet, this is not the case everywhere (combining local transport with regional trains is not possible in Hungary or Portugal, for example). Accessing all timetables and fares is close to impossible. Should a consumer be on holiday or crossing a country that is not theirs, the chances that they can find the best fares and the best itinerary are very small.

***"It is not possible to book Flixbus tickets on Deutsche Bahn's website (but the connection will be displayed), and it is not possible to book Deutsche Bahntickets on the Flixbus website (it's not even displayed) (...) Trainline shows tickets from all operators but does not offer the possibility to book all tickets."* – vzbv (Germany)**

***"SNCF Connect does not offer the option to book tickets from Trenitalia but used to offer the possibility to book Deutsche Bahn tickets. Trenitalia does not offer any SNCF tickets (neither high speed nor regional connections)." – UFC Que-Choisir (France)***

**The very good:** Some countries do perform well in terms of integration with other transport modes and dedicated discounts (which ideally should be more widely available, which is not always the case...):

- On top of very low prices for regional trains (going from Ljubljana to Kamnik, Borovnica or Litija costs around €2-4), *"there is a 75 % discount on regular prices during the weekends and holidays in connection with an integrated public transport card,"* our member ZPZ notes.
- *"In Denmark we have a national travel card (Rejsekortet) that can be used to pay for all public transport and all national, regional and local trains, buses, trams etc. Furthermore, on rejseplanen.dk you can find and buy tickets from A to B and in the new app Rejsebillet you can buy tickets for all public transport throughout the country,"* from our member FBRDK.
- Portuguese consumers have access to a monthly €49 pass giving access to all regional trains across the country. Discussions to extend the validity of the pass to long-distance trains are ongoing.

### **The mixed picture:**

- Looking for train tickets well in advance can be quite a challenge in Spain. In the routes our members looked at, tickets and timetables can be found at various time horizons, but often not more than a month in advance. Looking for a train ticket between Salamanca and Madrid *"can be done up until one month in advance. Then, there are only three timetable tickets available per day until the end of the year (...) We don't know if the deadline date is a period (one month, two months...) or a date"*, OCU and CECU noted. Other countries (Hungary, Portugal) also display timetables and tickets not more than two months in advance.
- Most regional trains apply a flat rate, regardless of the time of the booking.
- Flexibility of tickets is highly variable, with standards tickets being fully transferrable for many regional trains. However, many online tickets are personal. For high-speed, cancellation fees apply and vary between operators.



- The Frederica-Sønderborg connection in Denmark (120km) costs around €54, which, even for Danish standards, appears quite expensive. This is even more true as Denmark is considering making internal flights VAT-free.<sup>12</sup> One can therefore question whether it is the right approach in light of the Green Deal's objectives.

### Convenience and accessibility

**The bad:** The daily experience of commuters can be altered by lots of frustrating factors:

- Older trains do circulate on many routes, as reported by our members from Slovenia, Hungary, and Italy.

***"Trains from company X tend to be dirtier, with toilets not working on a regular basis" – OCU & CECU (Spain)***

***"The stations are often not staffed and, in many cases, consisting only of a platform with some rudimentary shelter" – EKPIZO (Greece)***

***"Regional trains used by commuters are often overcrowded, old and dirty, with few services on board. Timetables are not always respected and there are frequent missed runs, delays and cancellations, as well as technical failures on the railway line" – Adiconsum (Italy)***

- Carrying extra luggage or pushing a pram has repeatedly been reported as complex by BEUC members, notably due to high steps, older trains and narrow platforms. For some trains (in Slovenia and Spain), an extra fee is requested for large luggage.
- Hopping on a train with a bike, despite being a possibility by EU law, can be either promoted or very much restricted depending on the country or the operator:
  - o In Deutsche Bahn's ICE trains, a bike costs €9 per trip.
  - o In Spain, carrying a bike can cost up to €30 in high-speed trains while being free in so-called local "Cercanías".

***"For the Amsterdam-Rotterdam route, a special bike-ticket is needed (€7.50 per day) and bikes are only allowed outside of weekday rush hours" – Consumentenbond (the Netherlands)***

**The very good:**

- New trains in Slovenia provide Wi-Fi to all passengers without restrictions.
- In Slovenia's trains or in Denmark, the fee to hop on with a bike is very incitative (free of charge in the Danish S-Trains around Copenhagen, 3€ for other trains).
- All Germany's ICEs have dedicated areas for families and small children. In general, there is enough space for prams. Similar examples can be found in Denmark.

***"The latest 2nd class carriage on company X offers a 'Family Zone' with a children's cinema and table games. There are also wheelchair spaces, a wheelchair accessible toilet, vehicle-side boarding assistance, sockets for charging wheelchair batteries, service call button, tactile elements, acoustic and optical information, severely handicapped spaces, or space for assistance dogs" – TVE (Hungary)***

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<sup>12</sup> The Local (4 March 2024), [Danish government could make domestic flights VAT-free](#), consulted on 15 March 2024.

### **The mixed picture:**

- Despite some good examples, assistance for people with disability vary across countries. In accordance with Chapter V of the Rail Passenger Rights Regulation,<sup>13</sup> all operators must provide assistance should they have been notified. However, despite an indicative 24-hour timeframe, Member States do apply different periods and procedures. While they are allowed to do so until June 2026, the lack of common application of such basic right is unfortunate and must be changed.

***"Assistance for entering/leaving the train must be booked by 20:00 at the latest on the day prior to the journey – which is possible by phone, fax or e-mail. Due to personnel shortages and/or technical problems with mobile lifts, assistance at the station is not guaranteed" – vzbv (Germany)***

***"Older trains and wagons are not really suitable for people with reduced mobility (high steps, narrow corridors). They must inform the operator of the intended route and the necessary assistance at least 48 hours in advance" – ZPS (Slovenia)***

- The age under which children can travel for free varies across countries. In Germany's ICEs, kids under the age of 14 travel for free but pay only a reduced fee on regional trains. In Portugal, kids under the age of three travel for free as long as they do not occupy a seat. In Spain, discounts for children vary depending on the rail operator, with a one-year difference in the definition of a child.
- In Portugal, the transport of bicycles and scooters is free of charge, but before boarding the train, passengers must contact the Ticketing Operator, who will always be responsible for issuing their ticket and guaranteeing or not the transport of their bicycle, since this is subject to the limitations of the space available and the type of rolling stock used.

### **Cross-border trains**

BEUC members have highlighted some barriers to the use of cross-border trains. But the striking example is the overall lack of positive feedback from consumers taking longer and high-speed cross border trains, demonstrating the uncertainty about passenger rights and more ticketing issues.

### **The bad:**

- Clear missing links and degradation of pre-existing situation have been reported, notably in Greece and Portugal.
  - o *"Today, there are only two international railway connections between Portugal and Spain,"* notes our member DECO.
- A lack of frequency and of the possibility to hop on the next train, along with the poor coordination of timetables make it harder for many consumers to envisage cross-border trains as a go-to option.
- A key point identified by BEUC members refers to the difficulties for new and cross-border operators to operate in accordance with maintenance works foreseen by national infrastructure managers. This has notably been flagged in France where the

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<sup>13</sup> [Regulation \(EU\) 2021/782 of the European Parliament and of the Council of 29 April 2021 on rail passengers' rights and obligations \(recast\).](#)

infrastructure manager seems to not cooperate smoothly with operators other than SNCF.

- Ticketing is also the main issue in the case of long-distance or high-speed connections.

***"Eurostar does not include Deutsche Bahn's connection and Deutsche Bahn shows Eurostar connections but does not make it possible to book a ticket" – vzbv (Germany)***

***"When it comes to the cross-border Celta Train (Porto – Vigo), the Portuguese operator's website doesn't allow you to buy tickets, indicating a link to the Spanish operator's (RENFE) website" – DECO (Portugal)***

**The good:** For regional cross-border trains, ticketing integration is rather efficient. This is notably the case in the Netherlands and Germany.

### **Night trains**

When it comes to night trains, BEUC members have mixed experiences with this type of trains, due to the lack of consumer feedback and the scattered role of night trains across Europe.

**The good:** Our Hungarian member TVE described Budapest as well-connected (to Berlin, Munich, Prague, Zurich and Bratislava) with overall good quality of night trains and the possibility to book single, double, triple or four-bed coaches.

#### **The bad:**

- Some new night train operators rely on old rolling stock, making them rather uncomfortable or unsuited for passengers with a disability. Overall, BEUC members shared stories about the difficulties of night train companies to get the necessary financial resources and level of maturity to buy or build the necessary rolling stock or sustain their operation.
- Regarding the accessibility of tickets, once again there is a lack of information and ticketing options. As our Dutch member Consumentenbond notes: "[Both] night train services appear on the website of the incumbent operator, but no price information or information how to book is provided."

***"Night trains from Portugal stopped running in March 2020. The pandemic led to the closure of borders and the suspension of the service. COVID-19 is no longer in its urgency phase, but the Lusitania (to Madrid in Spain) and Sud Express (to Hendaye in France) trains never ran again" – DECO (Portugal)***

### **Reliability and safety of the rail system**

Issues related to reliability have been reported across BEUC members.

***"Overall, the Greek rail network is restricted and underfunded. Much of it is out of operation due to chronic shortages. It has also been mismanaged for a long period of time" – EKPIZO (Greece)***

***"The on-time performance of the high-speed train leaves a lot to be desired, for many years already. For example, the on-time performance of this line was just 51% last November"<sup>14</sup> – Consumentenbond (The Netherlands)***

***"The main problem is reliability (delays, cancellations, broken trains or line interruptions), quality and cleanliness of the wagons, on board services" – Adiconsum (Italy)***

Without pre-empting the solutions we are proposing, this shows the importance of the deployment of an efficient train management system (see sections 2.4 and 3.1). The deployment of European Standards should greatly improve the situation, although it requires large-scale investments.

### **Passenger rights remain variable and often out of reach for consumers**

In different countries, BEUC members reported very concrete issues consumers are also facing when hopping on one or several trains. These issues often relate to the (very) relative enforcement of passenger rights or the lack of proactive communication towards passengers regarding assistance and compensation. Some countries seem to show the way forward, although there can be some important caveats. For example:

- In Italy, it is rather easy to file a complaint and there are dispute resolution procedures. Normally, refunds are managed within a few days, although the refund automatically takes the form of a voucher that you can use for future ticket purchase within 12 months;
- In the Netherlands, the minimum delay to be eligible for a partial refund on the Rotterdam-Amsterdam high-speed line is only 15 minutes, and there is no reservation needed... but the on-time performance of the line was just 51% in November 2023;
- In Greece, tickets (which are transferable) can be fully reimbursed up until 48 hours before the journey begins. This is then reduced to 80% of the price for up to two hours, and then only 50%.

***"Amounts less or equal to €4 are not compensated" – EKPIZO (Greece)***

Just like for other parameters identified in previous sections, crossing a border often means falling into an insecurity hole for passengers. Indeed, while many BEUC members reported the possibility to hop on the next available train (of the same company) for high-speed and regional trains at national level, this possibility disappears or becomes unclear for cross-border journeys.

***"Handling times can be very long, especially when multiple carriers are involved in a single ticket (...) For ICEs, information on rights for delays is not available in Dutch (only English), which creates a barrier" – Consumentenbond (The Netherlands)***

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<sup>14</sup> Spoorpro (28 December 2023), [In november slechts 50,9 procent reizigers via HSL op tijd](#), consulted on 15 March 2024.

These examples are also representative of how rail passenger rights<sup>15</sup> apply differently across countries. The revised EU rules entered into force in June 2023 but fell short<sup>16</sup> in many aspects, notably in allowing a long list of exemptions<sup>17</sup> for Member States and railway companies.

Finally, our members' reports repeatedly show the importance of the quality of service within stations and the possibility for consumers to speak to an agent, either physically or on the phone. Online tools can be deceiving, and the closure of many station counters creates risks for the most vulnerable consumers and the less tech-savvy ones.

This is notably the case when we asked BEUC members to tell us if a passenger could easily hop on the next train in case of delay/disruption:

- In some countries, multiple companies operate on a route and this right cannot be guaranteed;
- For some operators, consumers have to buy a new ticket and ask for reimbursement;
- Some operators make it easier to hop on the next available train for passengers with a flexible ticket;
- For regional trains, while this is widely possible, a time-limit can sometimes be imposed on a ticket, creating confusion for passengers.

***"It is easy to raise a complaint, but it is very difficult to be refunded/get compensation. Consumers complain of a total lack of response or no response for long periods (sometimes months), despite complaining several times. Consumers also complain about being obliged to use the company's own form to complain, under penalty of not being considered, including in the context of mediation processes initiated by DECO (...)" – DECO (Portugal)***

***"To raise a complaint is not easy, you have to go in person to a certain train station (there are two in Budapest and one in nine other big cities in the country)" – TVE (Hungary)***

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<sup>15</sup> Your Europe, [Rail Passenger Rights](#), consulted on 15 March 2024.

<sup>16</sup> BEUC (1 October 2020), [Reform of rail passenger rights - EU policymakers fail to meet passenger expectations](#), consulted on 15 March 2024.

<sup>17</sup> Your Europe, Ibid.

## What can the EU do? A timeline for an EU Masterplan for Rail

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The data gathered by BEUC members shows that the rail system is not the same for all European consumers, or that conditions vary greatly even within countries (not mentioning that crossing a border complicates the assessment). But a host of good practices have been identified across countries and already point at solutions we would like to see emerge. The first ingredients for a consumer-friendly railway system are scattered around Europe, which could certainly drive policymaking at national level.

Yet it is the political leadership from the European Commission that is paramount to pursue the objective of a better rail system for all consumers. The European level has significant leverage in terms of harmonisation and standardisation of infrastructure or rolling stock, coordination, data exchange, passenger rights and investment capacity to complement Member States' policies. As our research shows, a certain level of harmonisation of the best practises can benefit consumers.

But more than that, there is still too little integration for a truly European rail system despite decades of promises. Beyond the scattered technical environments in which they operate, historic rail operators are mostly serving their national markets, or enter other markets where profits are within reach at low risk. New market players struggle to find their place into this fragmented ecosystem with numerous barriers to entry that could be lifted by EU-wide measures. At the end of the chain, passengers are benefitting neither from all the best practises being developed here and there within the current technical, financial and policy framework nor from the untapped potential that could emerge via EU measures.

**BEUC is therefore proposing the implementation of an ambitious, EU-led Masterplan for Rail** in the years to come, accentuating the impact of the policies deployed by the European Commission in recent years and exploring untouched policy areas to improve consumer experience.

Indeed, while the Commission has put forward several commendable initiatives and made 2021 the European Year of Rail, important measures have been discarded or could not be presented in the expected timeline. The most recent example comes from the presentation of the Action Plan to boost long-distance and cross-border passenger rail services in December 2021. Back then, the Commission concluded the European Year of Rail with the promise to implement new policies "as a matter of urgency"<sup>18</sup> and even published a study<sup>19</sup> sketching out lots of measures to improve the EU rail network. Yet the Action Plan has not been fully implemented, with flagship initiatives<sup>20</sup> being postponed *sine die* or proposed with very little ambition<sup>21</sup>.

The aim of an EU Masterplan on Rail, jointly led by the future Commissioner for Transport and the Executive Vice-President responsible for Climate Action, is to give rail a major new political impetus centred around consumers' expectations and needs. This requires going

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<sup>18</sup> European Commission (14 December 2021), [New Action Plan: boosting long-distance and cross-border passenger rail](#), consulted on 20 March 2024.

<sup>19</sup> European Commission (14 December 2021), [Long-distance cross-border passenger rail services](#), consulted on 20 March 2024.

<sup>20</sup> The Multimodal Digital Mobility Services initiative, despite many announcements, has not been proposed during this mandate.

<sup>21</sup> The passenger rights initiatives [failed short](#) to deliver on truly harmonised, multimodal passenger rights.

beyond the necessary technical harmonisation (safety, signalling, traffic regulation)<sup>22</sup> and adopting ambitious policies on numerous aspects.

Our proposed Masterplan for Rail aims at developing the "perfect" rail network for consumers according to a timeline of action which we present below. Some of the proposed solutions can be put in place relatively quickly. Others require long-term structural responses. But the next European Commission can get to grips with the issue as soon as it takes office and ensure that rail momentum remains constant over the next few years. Crucially, as the "implementation of the Green Deal" seems to have become EU and national policymakers' new mantra, this EU Masterplan on rail – with high-level political ownership – would be a perfect illustration of a consumer-centric "delivery agenda" – one that EU citizens can easily relate to.

## **1. The quick fixes: deliver on old promises (2024-2025)**

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### **1.1. Make cross-border rail options visible and available to consumers**

This is one of the most frustrating experiences for consumers looking to book a cross-border train ticket: jumping from one tab to another among the dozen or so sites open on their browser to try and find a coherent journey at the right price. As our members clearly detailed, the lack of visibility undermines the potential of cross-border rail journeys.

This reality is a real brake on any cross-border or multimodal journey venture for consumers. Not to mention the fact that the very absence of multimodal offers visible to consumers (unlike the many sites offering the possibility of finding tickets for several airlines) actually makes the potential of such journeys invisible to political decision-makers, and consequently the need for additional measures to develop cross-border journeys.

The crux of the problem has been widely identified by stakeholders, independent researchers, and the European Commission itself. The main barrier to the emergence of one or more "Skyscanner(s) for rail" lies in the lack of data sharing by rail operators vis-à-vis the ticketing and booking platforms. Initiatives<sup>23</sup> already in place to promote data sharing are a step in the right direction but their implementation is not yet to the level it should be.<sup>24</sup> They are also insufficient as standalone technical measures and need to be followed up by policies intervening in the ticketing and booking markets.

This is because the battle around common standards or the unwillingness to allow tickets to be resold by third parties are other major obstacles to facilitate consumers' life. One should also address the question of platforms' liability to ensure consumer protection and force incumbent railway companies to display competitors' options on their website upon request.

Since the first promises of change were made almost 15 years ago, it must be said that the situation has not really improved for consumers to easily book cross-border trains.

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<sup>22</sup> A lot has been done in terms of technical harmonisation, although the progress is way too slow. While we acknowledge the importance of this aspect, this paper discusses other initiatives to complement the work already undertaken. We briefly touch upon technical harmonisation in section 2.4 when discussing the role of the EU Railway Agency.

<sup>23</sup> The revised [Delegated act on Multimodal Travel Information Services](#), the proposal on a [common European Mobility Data Space](#), the [proposed Regulation on passenger rights in the context of multimodal journeys](#), and the [Telematics Applications for Passenger Service Technical Specifications for Interoperability](#).

<sup>24</sup> European Railway Agency (July 2023), [Interoperability Overview 2023](#).



Private initiatives have done very little. A political solution to this problem is therefore an essential starting point for a European rail strategy.

The European Commission's Multimodal Digital Mobility Services (MDMS) initiative has been under discussion for several years. BEUC has worked extensively on [recommendations](#) for this initiative to work. However, due to a lack of political will and the complexity of the file involving many transport modes, this initiative never saw the light of day (again, this is despite numerous studies, expert group meetings and impact assessments). The usefulness of such regulation in the rail sector keeps being demonstrated by the various competition cases opened by the national authorities.<sup>25</sup>

### Recommendation

As soon as it takes office, the European Commission should therefore take on the well-established and ambitious policy options for MDMS on the table and adopt a sector-specific regulation for rail. This should force railway operators to allow for the re-selling of their tickets (along with allowing competitors on the large operators' platform) and make all data, traffic information and fares available to trustworthy platforms. This would bring immediate benefits for consumers and form the basis for truly multimodal booking options to emerge.

## 1.2. Adopt truly effective cross-border passenger rights

In November 2023, the European Commission proposed a set of new initiatives to better protect passenger rights.<sup>26</sup> However, the package falls short in creating a truly safe environment for consumers, especially when they cross a border or take several transport modes. For example, the proposed Regulation on passenger rights in the context of multimodal journeys<sup>27</sup> leaves consumers widely unprotected, especially when using a 'combined multimodal ticket' which is, by far, the most common type of multimodal ticket on the market.

This even more important as the absence of clear liability mechanisms between railway operators and platforms (which would be part of the MDMS initiative) and the very limited offer of 'single multimodal ticket' only accentuates the insecurity for passengers.

### Recommendation

BEUC has a set of [recommendations](#) for policymakers to substantially improve the Commission's proposals as soon as they take office after the EU elections in June 2024. Our main asks are to ensure basic passenger rights across the board, insisting on assistance and re-routing in case of disruption, no matter the type of ticket consumers may have.

<sup>25</sup> The [Bundeskartellamt](#) called out Deutsche Bahn for imposing unlawful restrictions on platforms and the [European Commission](#) concluded a formal investigation over concerns that Renfe has abused its dominant position in the Spanish passenger rail transport market by refusing to provide rival ticketing platforms with full content concerning its range of tickets, discounts and features and real-time data (pre-journey, on-journey or post-journey) related to its passenger rail transport services.

<sup>26</sup> European Commission (29 November 2023), [Improved rights and better information for travellers](#), consulted on 22 March 2024.

<sup>27</sup> Idem.

### 1.3. Promote healthy competition between rail operators and a greater rail offer for consumers

In its 2021 Action Plan, the Commission stated it would “provide guidelines in 2023 for setting track access charges which support and encourage the development of long-distance and cross-border passenger services”. So far, these guidelines have not been published and are now expected by the end of 2024. Addressing this issue can help provide fair competition between railway operators, notably on high-speed lines and night train operations.<sup>28</sup>

Of course, reducing track access charges by X% might not always mean that ticket prices would become lower following a 1:1 ratio. Yet it allows for potential competitors to overcome an important barrier to entry (on top of a clear need of stability in the price to pay to the infrastructure manager), benefitting consumers thanks to lower prices and a wider offer of trains. Italy successfully improved the situation on these two aspects by lowering its track access charges on high-speed lines.<sup>29</sup> An analysis<sup>30</sup> by the association Back-on-Track.eu also estimates that a preferential treatment for night trains in paying track access charges could either improve comfort or lower prices while boosting the offer of night trains. In the long run, revenues for infrastructure managers could even be higher thanks to more traffic. Overall, the cost components of track access charges must be transparent and help maintain the network while encouraging more traffic.

Other tools could further strengthen competition and modal shift, notably the updated State Aid guidelines for rail transport. Greater alignment with the Green Deal’s objectives and greater aid intensities should benefit all rail actors while the purchase of rolling stock could be better supported, in the interest of a greater offer for passengers.

#### Recommendation

We call on the Commission to urgently publish guidelines for the reduction of track access charges. It should also pursue pilot projects with Member States, assessing the benefits and potential negative effects on subsidised and less profitable lines. As foreseen by the 2021 Action Plan, it should also explore an EU-wide VAT exemption for cross-border rail services. Finally, the long-awaited revision of State Aid guidelines for rail transport should even rail costs out vis-à-vis polluting transport modes. New market players should be supported in their operations and the purchase of rolling stock. Public support for interoperable rolling stock should be encouraged.

<sup>28</sup> Back on Track (18 October 2023), [Paving the way for more night trains – with fair track access charges](#), consulted on 22 March 2024.

<sup>29</sup> Raphaëlle Laurent – Les Echos (13 March 2024), [SNCF : la concurrence peut-elle faire baisser le prix des billets de train ?](#), consulted on 10 April 2024.

<sup>30</sup> Back on Track (18 October 2023), Ibid.

#### 1.4. Improve rail timetables and their coordination for cross-border trips

The availability of railways' timetables and the quality of the data published in common databases (such as MERITS<sup>31</sup>) is a major issue for the development of truly functional cross-border services.<sup>32</sup> With new legislation in place foreseeing the sharing of new datasets and plans to make them available to third parties<sup>33</sup>, the European Commission must hold railway operators accountable for sharing data of good quality well in advance.

Enforcing existing data sharing obligations can go a long way for proper consumer information: already today, planning tools could display all available routes and propose itineraries without missing links or options, avoiding consumers the hurdle of opening different tabs in their browser with the fear of not having all options displayed. The role of the European Railway Agency (see section 2.4) in overseeing and enforcing the quality of the data shared is crucial. The Agency should be equipped with the capacity to do so.

National access points which gather this data should also play their part in getting information from railway operators. As such, the definition of a minimum timeframe to share information should be put in place under EU oversight. This means that:

- The operators' timetables should be available to consumers well in advance;
- Consumers can buy their tickets at least four months in advance to compete with air travel. Information about that possibility should be available on all platforms.

The current discussion around the use of railway infrastructure capacity<sup>34</sup> determines the allocation of train schedules along the EU's rail infrastructure. This should give greater clarity for railway operators, especially newcomers, to plan their development on cross-border routes. The Commission and Member States should then oversee the bottlenecks in cross-border connections and take corrective measures. The definition of common connecting times at transport hubs (i.e. the necessary time to connect to stations in one city) would further harmonise and facilitate the availability of cross-border rail routes.

#### Recommendation

The Commission should strictly monitor and enforce the data sharing requirements, by giving the European Railway Agency the human and financial means to do so. Sanctions should be foreseen in addition to the current data sharing requirements. The Commission must also define a common minimum period (before the date of the journey) by which the timetable data must be shared and available to consumers. Consumers should ultimately be able to book any train ticket at least four months in advance to plan their journeys accordingly.

The Commission should also make use of the available data to identify bottlenecks and inefficiencies when crossing a border by train. Minimum connecting times at transport hubs should be clearly defined and be applied by all journey planners and platforms.

<sup>31</sup> UIC, [MERITS Database](#).

<sup>32</sup> Jon Worth (14 January 2022), [Skyscanner for rail? Before we can even build such a thing, we need a European rail timetable](#), consulted on 10 March 2024.

<sup>33</sup> European Commission (14 December 2021), Ibid.

<sup>34</sup> The [proposal for a "Single European Railway area"](#) is currently being discussed between the European Parliament and the Council.

## **2. The ambition for the next EU mandate: rally all stakeholders to put consumers' needs at the heart of rail policies (2025-2029)**

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While solving the well-identified issues for which the preparatory work has been done, we propose that the European Commission sketches out a plan to respond to the problems our research has pointed out, focusing on harmonising the consumer experience of train travel.

The European Commission does not have to start from scratch, however. A comprehensive report led by Steer and KCW<sup>35</sup> accompanied the Action Plan to boost passenger rail in 2021. Our recommendations align with the ambitious policy scenarios envisaged by this report and propose new, complementary measures to achieve the objective of boosting passenger rail. Our approach is to put the needs of consumers at the heart of the concerns of all those involved in the rail industry. Under the aegis of the European Commission and the European Rail Agency, we are proposing a series of obligations and targets to make rail an attractive and convenient experience for consumers.

### **2.1. Set the rules for railway operators and platforms – establish an EU-wide passenger protection and information policy for consumers taking the train**

Our first recommendation aims to establish a free, EU-wide passenger protection and information policy for rail passengers under the supervision of the European Railway Agency and a stakeholder consultative body, taking example of the European Parliament's proposal for a European Railway Platform<sup>36</sup>.

Indeed, all the problems we have identified in our review of the rail systems reveal the absence of any form of global protection and information policy for consumers. They need clarity about the conditions of travel in order to have:

- The assurance of finding the timetable and the tickets for regular trains from early morning until late evening, and to hop on the next available train in case of delay;
- The assurance of finding a seat for them and their family in a comfortable carriage;
- The assurance that they can take their bike or luggage on board at no or reasonable cost and under reasonable conditions;
- The assurance of finding assistance and service at the station, in-person or via a means of communication allowing for the discussion with a person;
- The assurance of easily (i.e. by proactive action from the operator or platform) obtaining the necessary information (delays, connections, assistance, reimbursement...) before, after, and at any point during their journey;
- The assurance to board a train regardless of their physical condition.

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<sup>35</sup> European Commission (14 December 2021), Ibid.

<sup>36</sup> This platform would gather railway operators, platforms, the European Commission, infrastructure managers and consumer/passenger organisations.

The European Railway Platform should monitor the implementation of this regulatory plan but could also promote good practises benefitting rail passengers. As a complement, an observatory of EU railway systems (looking at similar criteria as our research) could be a great addition to monitor the rail system. There is indeed a need to further improve journey quality through independent quality monitoring. In order to ensure comparability of the service quality of the various carriers over a longer period of time, external bodies should collect and process qualitative and quantitative information in accordance with scientific rules. In this way, carriers can further increase customer satisfaction and thus demand, making public transport more attractive overall.

### **Recommendation**

An EU-wide passenger protection and information policy would mean the review of Rail Passenger Rights Regulation to:

- Establish an EU-wide right to hop on the next available train, whatever the operator;
- Strengthen the accessibility requirements for people with disabilities and include the notions of comfort/ease of use (setting ambitious requirements for regular availability of trains, family space, strictly limited exemptions and maximum fares for bike and luggage accessibility, right to connect...);
- Define a common age limit under which children travel at no cost to promote rail travel for families;
- Make sure consumers have access to the information about disruption and re-routing options in real-time by various means and can rely on the assistance of a physical helpdesk at stations;
- Remove national exemptions to the application of passenger rights;
- Extend financial compensation in case of delay and delete the threshold under which payments for compensation are not paid.

BEUC long-standing [recommendations](#) on rail passenger rights remain valid.

### Recommendation

Other initiatives would fit into this EU-wide policy to ensure the availability of rolling stock and their user-friendliness or the right to accurate information. The EU should:

- Determine the conditions for the availability of timetables to consumers well ahead of a planned journey, along with the possibility to book a ticket at least four months before the trip (see section 1.4);
- Allow for greater flexibility for tickets purchased online and for high-speed lines;
- Ban the scrapping of old wagons when they are no longer in use and open them for auction;
- Adopt European comfort standards for the design of new rolling stock, especially for people with disabilities. New trains should *de facto* have greater space for luggage, bikes, and provide space for families;
- Mandate the inclusion of independent and affiliated rail/multimodal platforms on a European list to keep a register of compliance with legal obligations, particularly regarding pricing practices, consumer information, assistance provided, and display of competing transport options.

In order to systematically collect passenger preferences and support the planning and design of rail transport services, the Commission should make independent quality monitoring a mandatory part of the assessment of service quality.

## 2.2. Engage with Member States – learn from each other, coordinate, invest

Member States remain the key political actors to establish rail policies that deliver for consumers. Along with our members, we therefore call on national governments to adopt the best practises and develop their own ambitious plan for rail, as per the findings of our research. Member States could notably adopt ‘passenger convenience plans’ as part of their investment strategy, answering the concerns we identified, notably in terms of accessibility.

For example, some of the routes our members have been reviewing are clearly underused with a potential to expand the offer of trains. Some countries do better with lower track access charges and Public Service Obligation (PSO) contracts open to all operators. Replicating the good practises identified here and there is certainly a matter of resources, but there is a great variety of measures to be taken, from the Amsterdam-Den Haag almost 24/7 connection to the Danish system of integrated ticketing. Smaller trains could also be provided under favourable conditions from the infrastructure manager and the national authority to promote the use of rail on some routes.

Coordination is also a prerequisite for efficient cross-border rail, which appears as rather invisible (or their conditions are unclear) for consumers in many parts of Europe. With greater availability of data and the better capacity allocation should come the emergence of bi- and multi-lateral agreements to develop cross-border routes that are attractive to consumers. What is more, the cooperation between enforcement bodies is crucial to oversee the market and to allow consumers to direct their complaints to their own national authorities in case of a dispute during a cross-border trip.

### Recommendation

On top of their prerogatives, BEUC proposes to enhance the cooperation between Member States at different levels via a dedicated forum similar to the European Railway Platform. The exchange of good practises should be integrated into national investment plans to promote rail use by focusing on passenger convenience, frequency of services and easier connections.

Member States can also cooperate on the following:

- Developing common PSOs (open to all operators) between Member States to fill the gaps for a regular train schedule;
- The review of the Rail Passenger Rights Regulation should strengthen an institutionalised network of national enforcement bodies to pursue the objectives of a well-functioning market and a protective rail environment for consumers.
- The coordination between infrastructure managers and all rail operators should be better monitored to ensure the fair competition and easier trip planning for consumers.

## 2.3. Bring creative financing in – facilitate the purchase and lease of rolling stock

As the state of night trains shows, the availability of rolling stock is a major obstacle for newcomers in the rail market. As the European Investment Bank rightly points out: “once the rolling stock provision is decoupled from the operation of rail services, new market players can compete with incumbents on a level playing field.”<sup>37</sup>

New financing solutions have emerged to allow for the purchase of rolling stock<sup>38</sup> and the announcement of a Green Rail investment Platform<sup>39</sup> in 2021 was a promising venture. More needs to be done for these financing instruments to benefit new operators, with attractive leasing offers backed by financial institutions but also via the use of dedicated funds to develop new routes that would help consumers shift to rail.

<sup>37</sup> European Investment Bank (19 July 2022), [Transport Lending Policy 2022: The Way Forward](#), consulted on 10 March 2024.

<sup>38</sup> European Investment Bank (15 November 2023), [New trains, new lines, new technology](#), consulted on 10 March 2024.

<sup>39</sup> European Investment Bank (14 December 2021), [EIB launches “Green Rail investment Platform”](#), consulted on 10 March 2024.



### Recommendation

To pursue the efforts already undertaken, an EU-wide plan to purchase rolling stock of different categories (based on precise specifications for consumer-convenience), backed by the European Investment Bank, would be an ambitious project to kickstart under the next Commission mandate. Financial support for second-hand rolling stock and refurbishment should also be dedicated to new market players, with incentives to avoid the scrappage of existing rolling stock.

## 2.4. Make it work – empowering the European Railway Agency

The recommendations we have mentioned can only really be implemented if the European Commission gives the European Rail Agency the resources it needs to fulfil the ambition of an EU Masterplan for Rail. Making the European Railway Agency a 'Eurocontrol for Rail' to extend its powers beyond the supervision of the technical harmonisation and delegated regulations is essential to monitor the market and the implementation of the new set of rules to be adopted.

This is an ambitious yet necessary exercise. A starting point would be to empower the European Railway Agency with enforcement capacity for the technical harmonisation (as part of the "quick fixes" in section 1). Already today, the Agency recognises the slow implementation of the European Rail Traffic Management System (ERTMS) but can only regret the situation. Added to this is the lack of technical harmonisation of systems related to data exchange, safety or interoperability of rolling stock. The Agency also points to national barriers as an obstacle for a truly European rail system: "although interoperability of the Union railway system is improving, the progress has been slow so far and it appears to be unequal/uneven when looking at different areas (...) Existing national rules can represent an obstacle to interoperability and effective cross border traffic and should be limited to the minimum necessary."<sup>40</sup>

A next step would then be to enlarge the scope of the Agency's prerogative to oversee and enforce the implementation of the EU Masterplan for Rail. This certainly requires more human and financial resources to be allocated to the Agency. But giving it the power to be the *gendarme* of the railway sector is essential, be it on the quality of the data shared by market players, the coordination of timetables, the resolution of disputes, the management of new entrants or the development of quality standards for railway operators and platforms.

### Recommendation

The European Railway Agency should be given the necessary powers to effectively enforce the existing requirements (data sharing, technical harmonisation, ...) and oversee the implementation of the measures included in an EU Masterplan for Rail.

BEUC therefore calls on the European Commission to increase the European Railway Agency's resources in view of the growing regulatory oversight needed to make an EU rail system work for consumers.

<sup>40</sup> European Railway Agency (July 2023), Ibid.

## **2.5. Go beyond rail – develop urban nodes, connecting hubs and an integrated mobility offer around train stations**

Arriving at the station is usually not the end of the journey for passengers. Developing a mobility ecosystem around train stations will reinforce the attractiveness of rail. The main European cities are now obliged to adopt their 'Sustainable Urban Mobility Plans'<sup>41</sup> which require them to develop an integrated mobility offer in a defined geographic area.

Taking the example of Denmark and the integrated ticketing system in place, the deployment of rail connections and the greater data exchange between stakeholders should be the opportunity for cities to take part in a truly multimodal offer for passengers arriving at or leaving their train station.

### **Recommendation**

The MDMS initiative (see section 1.1) should therefore encourage the full integration of transport options (via data exchange from operators to third parties). Hub managers in cities, along with the Commission, should make available in a central database the various transport services available and define minimum connecting times between them.

Touristic offers around stations should also be developed, allowing consumers to rent an electric car and charge it at their holiday locations, or benefit from reduced tariffs for commuting with public transport around the station.

## **3. The long-term planning (2027-2035 and beyond) to prepare now**

Investments in infrastructure, technical harmonisation, safety systems and rolling stock are essential to complete a true Single Railway Area in Europe. This last chapter, peaking at the longer-term planning, does not diminish the urgency of investing in rail. Rather, we wanted to flag the lower-cost measures to be put in place, as many of them have a great added value for consumer convenience and the number of rail passengers, ultimately benefitting from the system as a whole.

In our view, the calls for investment should prioritise the reliability of trains to create a positive image of rail travel in the mind of consumers and make it appear as a credible alternative to planes and cars. Investments must also be linked to greater scrutiny and accountability vis-à-vis railway operators and platforms with regards to the policy measures we presented hereabove. BEUC therefore supports a 'give-and-take approach' on the matter, stressing nonetheless the importance of allocating greater investment capacity for rail in the next EU budget.

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<sup>41</sup> European Commission, [Sustainable urban mobility planning and monitoring](#), consulted on 15 March 2024.

### **3.1. Make more funds available for the completion of the TEN-T network and ensure Member States commit to it**

By 2030, the core Trans-European Network (TEN-T) – the most important connections between major cities – should be completed. For rail, this notably means further investments in infrastructure and on-board installations such as ERTMS and its European Train Control System (ETCS), improving safety and speed. This is a core battle for the global harmonisation and the proper deployment of reliable rail services. Yet ERTMS is far from being implemented<sup>42</sup> and it is widely accepted that further investment will be needed.<sup>43</sup>

The challenges are multiple as national investments in rail infrastructure compared to road have been decreasing over time in Europe,<sup>44</sup> leading to the delays and disruptions BEUC members have clearly identified. Member States must comply with their obligations to complete the TEN-T network by investing sufficiently and the EU should have the means to pursue them when it is clear they are not on track. Yet, this will not be enough.

The main EU budget instrument for transport, the Connecting Europe Facility (CEF),<sup>45</sup> has a budget of €25.81bn for the 2021-2027 period. This is only a slight increase compared to the previous period, while railway operators and infrastructure managers estimate that the 2020 decade requires more than €400bn of investment (EU, national and private combined) to complete the core TEN-T rail network. The EU's annual investment gap for rail is estimated at €29bn.

The next CEF period starting in 2028 will therefore be an important moment for the EU's investment capacity in rail. At that time, if implemented, the policy measures we presented should have delivered their first results. The support for more fund available to rail can only be greater should the market players have delivered on their old promises, supported by EU regulations.

### **3.2. Prepare a massive investment plan for a consumer-friendly rail system**

Railway operators call for high-speed rail to be doubled by 2030 and tripled by 2050.<sup>46</sup> While this is an appealing picture, the costs of high-speed rail are high. And as the European Court of Auditors<sup>47</sup> noted back in 2018: "There is no realistic long term EU plan for high-speed rail, but an ineffective patchwork of national lines not well linked since the European Commission has no legal tools and no powers to force Member States to build lines as agreed. (...) Cost-efficiency is at stake, because not everywhere very high-speed lines are needed, (...) while cost overruns and construction delays are the norm rather than the exception."

With scarce resources foreseen in the next EU budget, the Commission should support the construction of high-speed rail where it is the most relevant. It must also make its support conditional on the presence of a fair and competitive market to the benefit of EU consumers in terms of price, comfort, and accessibility. However, to further support rail vis-à-vis other

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<sup>42</sup> European Railway Agency (July 2023), Ibid.

<sup>43</sup> UNIFE (May 2018), [For a complete TEN-T, an increased EU budget is needed](#).

<sup>44</sup> Idem.

<sup>45</sup> European Commission (20 July 2021), [Connecting Europe Facility 2021-2027 adopted](#), consulted on 10 April 2024.

<sup>46</sup> Community of European Railways (9 November 2023), [Rail Sector presents High-Speed Masterplan for Europe & calls for significant extension of current infrastructure](#), consulted on 10 April 2024.

<sup>47</sup> European Court of Auditors (26 June 2018), [Special report n° 19/2018: A European high-speed rail network: not a reality but an ineffective patchwork](#), consulted on 10 April 2024.

transport modes which have been historically advantaged, fresh financial means should be directed to rail projects. The continuous development of new financing schemes (with the support of the European Investment Bank) must also be explored.

Consumers themselves should be supported. As they will also directly be affected by carbon pricing (with heating and mobility being integrated in the EU Emissions Trading System as of 2027), the EU and Member States could greatly help consumers in choosing sustainable transport options. This support could take several forms, taking example of some good practises we identified:

- Mobility budgets available to consumers who need it the most, fostering the use of rail for their daily mobility;
- Lower and fixed ticket prices for regional trains (avoiding last minute price surges) and greater scrutiny of pricing mechanisms for long-distance high-speed rail;
- Extension of the Interrail ticket to make it a truly European initiative valid throughout the entire railway network;
- Discounts widely available for families (and especially children) and lower-income groups to make rail competitive vis-à-vis the car for all trips;
- The establishment of more cross-border Public Service Obligations with public intervention in the ticket price.

### **Recommendation**

The EU should set up a massive investment plan for rail, starting now with the completion of the TEN-T core network and the implementation of ERTMS. Within the next EU budget, the Commission should propose to double the funds (the Connecting Europe Facility) dedicated to rail and deploy new financing tools along with the European Investment Banks such as the one we propose for rolling stock. Instead of solely promoting the creation of high-speed lines, the investment plan should primarily support the measures of the EU Masterplan for Rail aiming at easing consumers' experience when taking the train. The plan should focus on the reliability of existing lines and the missing links in the EU rail system. It should support regional lines and train services under Public Service Obligations while creating frequent/convenient connections between and around cities.

Consumers should also be directly supported through mobility budgets, lower prices, and discounts to encourage families to travel by train or climate tickets.

Member States should also commit to increase the investments in rail, as part of their national plans to increase passenger convenience (see section 2.2).

## Conclusion: putting consumer convenience at the centre of rail policies can go a long way

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The last five years have seen the emergence of numerous policies providing a technological response to the challenge of decarbonising transport. Yet, it is now clear that they won't be enough to achieve our climate targets. There is therefore an immediate need to make use of the potential of modal shift to reduce transport emissions. Reducing car use and plane journeys cannot just be a side measure.

The good news is that modal-shift oriented policies can deliver many benefits to consumers, along with tackling mobility poverty for those who cannot afford private transport modes. Encouraging modal shift would therefore lead to self-reinforcing social and climate effects. For this to succeed, however, rail policies must put consumer-convenience at the heart of a renewed political ambition. Here again, increasing the number of passengers via short-term measures designed to make rail more convenient, attractive, and competitive will reinforce the case for more long-term investment.

This is where we present our **EU Masterplan for Rail**, to be launched when the new Commission takes office in November 2024. Based on the findings of our members' survey of national rail systems, we propose a series of measures to be set out in detail for the period up to the end of the next Multiannual Financial Framework. This starts with quick fixes like easier cross-border ticketing, strong passenger rights, or the better coordination of timetables. The centrepiece of our Masterplan is the deployment of an EU-wide passenger protection and information policy whenever and wherever consumers are taking the train. This policy should cover aspects related to passenger rights, ticketing and booking, giving consumers access to all information, the easy right to hop on the next available train and a simple dispute mechanism.

We also propose measures involving Member States to improve passenger convenience, the exploitation of the full potential of the rail network, the development of a wider mobility offer around stations, or the involvement of financial institutions for the common purchase of rolling stock to help the promotion of new entrants.

This will require strict EU oversight which BEUC proposes to give to the European Railway Agency. As an enforcement agency, it would pursue the necessary work around technical harmonisation while monitoring policies and imposing sanctions where appropriate.

None of this can be achieved without political leadership from the European Commission, stepping up the efforts undertaken during the previous term. Our proposals put consumers at the centre of new policies and pave the way for a massive investment plan in the rail system. This investment plan must be prepared now (ahead of the next EU budget) and focus on creating the conditions for modal shift: this means investing in high-speed lines where necessary, but mostly supporting regional routes, fixing missing links, improving comfort, safety, and convenience as well as supporting consumers in taking the train.

A European Masterplan for Rail is a perfect fit in a political context where the focus should be put on translating the Green Deal's objectives to the benefit of consumers and defining the necessary measures following the 2040 Climate Target Communication. These measures build up to the core question of investments which are central to increase the capacity of the EU's railway network, but which can only deliver should a consumer-friendly framework be put in place in the years to come.

