

Report

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CER Ticketing Roadmap – 4th Implementation Monitoring Report Spring 2024

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1. Summary

Highlights:

- Solid CER Ticketing Roadmap implementation progress in all critical areas.
- The Open Sales and Distribution Model (OSDM) has been implemented in Sweden. This constitutes the first nation-wide, multi-party implementation of the new technical enabler for exchanging sales and distribution related data between rail carriers and distributors of rail tickets (“ticket vendors”).
- Eurostar became the latest party to the CIT Agreement on Journey Continuation, joining the ranks of 19 other railways.
- The AJC now represents over 90% of the CER members’ passenger traffic in the EU.
- A vendor has been selected to custom-build a new real-time information exchange platform by 2025. Passengers will benefit from more widely available real-time information during their journeys in the Single European Railway Area.

The CER Ticketing Roadmap (“Roadmap”) that was approved by the member railways’ CEOs in autumn 2021 remains a high priority for the railways. The Roadmap focuses on improving the passenger experience across Europe. Since its launch, it has been a key vehicle for CER members to significantly simplify passenger journeys in the Single European Railway Area by the implementing deadlines 2025 and 2030, respectively. To this end, the Roadmap establishes concrete actions. Timely implementation is a key token of the sector’s commitment to the European Union’s climate and growth goals.

With the Roadmap, the CER members actively support the new European Commission’s policy agenda for 2024-2029, especially its aim to make digital booking and ticketing easier. Delivering the key milestones of the roadmap by 2025 will fundamentally help reach this goal. CER members are working hard to implement the Roadmap so that passengers in Europe can benefit from a much-improved European ticketing experience already in 2025.

Since the adoption of the Roadmap by the CER General Assembly in autumn 2021 concrete actions have been launched both on a common level and on an individual railway level. With 15 months to go until the end of 2025, solution development and implementation work is in full swing. To gauge implementation progress and to identify areas that need special attention, the CER passenger railways are surveyed twice a year. Results are regularly presented to the member railways’ CEOs at the CER General Assembly. The report at hand presents a summary of the fourth such survey performed in April and May 2024. It summarises the state of play and highlights where efforts should be reinforced or re-calibrated.

The survey findings and recommendations were endorsed by the CER General Assembly on 23 September 2024. As a token of transparency and commitment, it was decided to make the key elements of the underlying report available to the wider public in a concise manner.

The fourth survey's turnout has again been high. Of the 29 CER member railways in question,

- 24 have participated
- representing 96,4% of CER members' intra-EU passenger traffic
- covering rail traffic in and between 21 EU Member States with rail operations on the Continent as well as the Eurostar operations to and from London.

Implementation monitoring coverage can be considered highly representative, both in terms of geography and in terms of ridership.

Roadmap delivery by the survey respondents remains largely on track, both regarding multilateral solution development and implementation by the railways individually. Individual implementation timelines have largely been re-confirmed and implementation work has been reported to be mostly on track. On balance, there were more material project accelerations than delays.

Responses to the fourth survey also show a solidly high awareness and confidence level by the railways. The number of "not sure" and similarly inconclusive answers to what needs to be implemented is negligible. Moreover, a previous observation has been reconfirmed: Those railways who are actively involved in the development of common services and in the CER Ticketing Task Force are generally more advanced in their implementation work. In response to this finding, railways are encouraged to continue their active participation in the established Roadmap related working groups and in the regular dissemination and facilitation formats.

Major progress has been made by launching the development of a new real-time information platform, scheduled for completion in early 2025. This platform will enable railways to share real-time data and integrate with third-party systems, enhancing passengers' access to information across the European rail network.

The Actions related to extending booking horizons and to harmonizing ticketing conditions are still the ones that deserve special attention. However, some good progress has been made by railways accepting some commercial risk by extending, for instance, booking horizons, or by bringing about customer improvements bilaterally with partner railways. It is proposed that such efforts are further encouraged by the railways.

For the first time, the fourth implementation monitoring survey additionally enquired about the railways' multimodality capabilities and goals. This was done to collect input for the 2030 time horizon of the Roadmap. Whilst the focus of Roadmap related activities remains on implementing the 2025 goals, railways are already preparing for the next phase, i.e. 2026-2030. The survey findings yielded a heterogeneous picture regarding the railways' current coverage of multimodal timetable information, the bookability of multimodal journeys and related matters. What it takes to harmonise the capabilities is being assessed and will be reflected in the 2026-2030 work programme.

With the official countrywide rollout, mid-April, of OSDM in Sweden, a significant leap forward in implementing the Ticketing Roadmap was made. Sweden, which has one of the most competitive and open rail markets in the European Union, has adopted OSDM as the standard for its national ticket distribution, for rail and other transport modes, both for rail ticket retailers and distributors. Moreover, the use case in Sweden shows that OSDM, as a neutral and open standard, is also interoperable with other standards like NeTeX for timetables. More OSDM implementations and OSDM-supported connectivity projects between railways and ticket vendors are imminent.

On 1 September 2024, Eurostar became the latest party to the CIT Agreement on Journey Continuation (AJC), joining the ranks of 19 other railway companies¹ in this key Roadmap initiative. Consequently, Eurostar passengers will be able to continue their journey in case of a missed connection, and without any extra cost if this is due to a delay or cancellation. With the addition of Eurostar, the AJC now represents over 90% of CER members' passenger traffic in the EU. CER expects more railway undertakings to join by the end of the year and in the course of 2025, further fulfilling the goal of passenger protection across the EU by 2025.

CER and CIT members are, together with the UIC, also working to digitalise their services by combining technical enablers for booking (OSDM), timetables (MERITS), real-time information and online ticket status (ETCD). This will further deliver a seamless ticketing experience to support passengers in case of delays and disruptions. In parallel, CIT is also working on improving the AJC, making it easier to understand and more accessible for passengers. Working together with the European Passengers' Federation, an explanatory leaflet was published on 15 April 2024².

The survey at hand highlights once again the dependence on third parties such as infrastructure managers and national authorities for some of the less mature Roadmap actions. The extension of booking horizons and the harmonisation of ticket conditions are particularly dependent on alignment with third parties. Some benchmark initiatives by individual RUs aimed at accelerating implementation in close collaboration with domestic stakeholders, or to take a degree of commercial risk to bring about customer improvements, have been reported. The Ticketing Task Force will further explore to what extent such lighthouse initiatives can be adopted by other RUs. CER members have been asked to address with national stakeholders the need for convergence between national legacies and the requirements of the Single European Railway Area as featured in the Roadmap.

The next implementation progress monitoring survey will be carried out in November/December this year. The key results will be reported accordingly once endorsed by the CER General Assembly.

2. Background and Purpose of this Report

CER Ticketing Roadmap

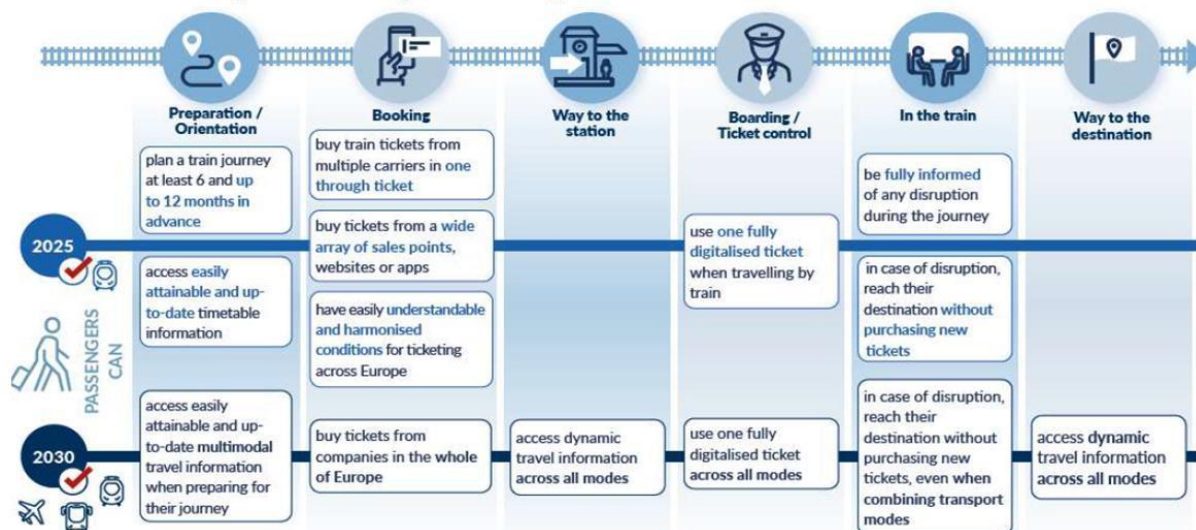
In September 2021 the CER General Assembly adopted the CER Ticketing Roadmap ("Roadmap"). The Roadmap encapsulates a vision of railway ticketing and distribution by 2025 and 2030, respectively, summarizing concrete actions to further improve the customer experience from planning and booking to travelling internationally by rail. It is therefore in line with the European Commission policies. The Roadmap is thus a key token of the sector's commitment to a truly Single European Railway Area and to meeting its own and the European Union's climate and growth goals. The effort of the CER member railways has so far been received well by stakeholders. However, they expect continuous

¹ As of September 2024, the following companies are members of the AJC: BLS and SBB, CD, CFL, DB, DSB, Eurostar (including Eurostar International Limited and THI Factory), GYSEV and MÁV-START, HŽPP, NS, ÖBB, PKP IC, Renfe, SJ, SNCB/NMBS, SNCF, SZ, Trenitalia, ZSSK.

² Cf. <https://www.cit-rail.org/en/passenger-traffic/products/#content-378627>

and tangible progress and customer improvements. Delivery on the roadmap is not only a pledge but also in the railways' very own interest.

The Ticketing Roadmap at one glance



Important Roadmap milestones are to be achieved by 2025 in each of the eight core areas of action:

#	Action (Focus: implementation by 2025)
1	More up to date timetables
2	Being able to buy train tickets at least 6 and up to 12 months in advance (booking horizon)
3	More up to date tariff exchange, enabling through tickets
4	European wide standardized API³ for selling train tickets
5	Increased harmonization of ticketing conditions (general conditions of use)
6	Full digitalization of tickets
7	Real time information during the journey
8	Better support during disruptions and delays

³ Application Programming Interface that allows two IT programs to communicate with each other.

To make this a reality, the CER Ticketing Task Force⁴ has published an Implementation Handbook and set up suitable governance structures for each of the core action areas of the Roadmap. The actions draw on already established sector working bodies, notably at UIC and CIT. The Roadmap is an integral, key part in these sector associations' work programmes.

Implementation Monitoring

To add weight to its Roadmap commitment and to ensure timely delivery, the sector has decided to monitor and report progress continuously. For this, and to drive and steer implementation, CER has contracted a consultant. In collaboration with the Ticketing Task Force and CER members, comprehensive progress reports are presented bi-annually to the CER General Assembly. The document at hand is a synthesis of the fourth such report. The key findings and recommendations were presented in detail to, and endorsed by, the General Assembly on 23 September 2024.

The synthesis was produced for a broader audience such as the European institutions.

3. Key Results and Recommendations

3.1. Overall Findings

Overall, implementation of the CER Ticketing Roadmap's 2025 milestones is on track.

CER members' awareness of and involvement in Roadmap related activities has further improved, as demonstrated by a further increased participation in international working groups and dissemination formats in the first half of 2024.

With PKP IC, an additional railway has joined the CER Ticketing Task Force. It is now made up of representatives from 13 railways plus from CER and CIT, and is furthermore supported by UIC and FTE. Approximately half of the CER member railways in question are therefore continuously involved in steering and further developing the Roadmap.

Several meetings with nominated company contacts were held to further disseminate Roadmap matters. There will be additional such interactions on a regular basis to ensure the Roadmap stays high on everyone's agenda.

24 of the 29 CER passenger railways have participated in the fourth monitoring campaign. This represents a solid turn-out. The results presented in this report can be considered authoritative and representative for the CER constituency at large.

The participating railways' internal projects are largely operational, and - depending on the maturity of the common services of specific actions - the RUs are implementing these projects to plan. Some railways report completion of specific elements of the Roadmap, especially regarding improved timetable and tariff data (notably by way of increased data upload cycles).

Thanks to the Roadmap, European rail passengers will experience tangible improvements by the end of 2025. RUs and groups of, for example, neighbouring RUs, are urged to accelerate implementation of all common services that are already available or that are

⁴ The CER Ticketing Task Force consists of representatives from ČD, DB, MÁV-START, NS, ÖBB, PKP Intercity, Renfe, SBB, SNCF, Trenitalia, VR and ZSSK and is supported by CER, UIC and CIT. Participation is open and encouraged to all CER member railways.

sufficiently mature. It is also recommended that implementing railways follow an agile approach wherever possible. For example, increasing booking horizons or timetable and tariff data upload frequencies to the respective UIC databases in steps constitutes tangible customer improvements.

Development of new and enhancement of existing common services that railways need to implement is making solid progress as well. The multilateral working groups that are tasked with specific actions of the Roadmap continue, overall, to work to plan. Together with the Ticketing Task Force, the Action owners have paid additional attention to activating resources and to de-risking their areas of responsibility.

The fourth survey reconfirmed that sector solutions, which need to be implemented by the RUs to become Roadmap compliant, are considered mature and fit for purpose. This refers specifically to the following initiatives:

- UIC MERITS database for timetable data exchange,
- Open Sales and Distribution Model (OSDM) protocol as a technical enabler for the sale of integrated and through-tickets,
- Electronic Ticket Control Database (eTCD) of the UIC for cross-RU ticket inspection,
- CIT Agreement on Journey Continuation (AJC).

Hence, it is generally accepted that there is a suitable portfolio of solutions at an implementing RU’s disposal. This also implies that the key tasks to ensure broad compliance with the Roadmap are indeed to be performed at an individual company level. Exceptions are, nonetheless, the Actions related to harmonization of ticketing conditions (Action 5) and the extension of booking horizons (Action 2). Here, the Ticketing Task Force made, and supports on an ongoing basis, an extra effort by the topical multilateral working bodies, notably at the UIC.

Significant progress has been made regarding the exchange of real-time information between railways and between railways and third parties: With the selection of an IT provider for a new real-time information exchange platform, based on a new UIC standard, a major milestone to provide consistent quality real-time data to passengers during their whole journey has been achieved. The new platform is planned to be available early 2025.

3.2. Risk Assessment

CER Ticketing Task Force risk assessment of Roadmap implementation status as planned, based on the survey responses and additional insights into the maturity of sector solutions:

Action	Assessment
1. Timetables	Further progress in increasing RUs’ frequency of making timetable data available. Further improving data quality and consistency needs ongoing attention.
2. Booking horizon	Progress with pragmatic and bilateral solutions.

	<p>Dependency on third parties (notably IMs, national bodies) to be managed.</p> <p>Booking horizons for domestic and cross-border services to be harmonized, where applicable.</p>
3. Tariff exchange	<p>Already solid use of established sector solution.</p> <p>Focus on incremental improvements.</p>
4. Standardized API	<p>Solution in place (OSDM). SJ went live as first RU. Various others have substantiated plans to do so in due time.</p>
5. Harmonization of ticketing conditions	<p>Common development of solutions to this broad-scope Action gained traction.</p> <p>Dependency on third parties (notably national bodies) presents a challenge; overcome this consistently presents a major challenge. Further alignment with national stakeholders needed.</p>
6. Digitalization of tickets	<p>Six RUs are already compliant, several others with concrete plans to become so shortly.</p> <p>Focus of multilateral work is on incremental improvements.</p>
7. Real time information	<p>Vendor selection by the UIC is completed. Systems development ongoing, based on new UIC standard. New real-time information exchange platform planned to be available early 2025.</p> <p>RUs' real-time data being tested against the new standard.</p>
8. Support during disruptions and delays	<p>Agreement on Journey Continuation (AJC) applied by additional RUs (notably Eurostar Group), making AJC a prime example of CER member collaboration.</p> <p>Incremental enhancements defined and generally supported by the railways. Additional activities to better take care of international passengers in case of disruptions and delays launched.</p>

3.3. Recommendations to CER Member Railways

The aspired step changes entail a degree of dependency on third parties such as Infrastructure Managers and on national or European legislation. Railways and groups of, for example, “neighbouring” railways, are urged to accelerate implementation of all common services that are already available or that are sufficiently mature.

The railways are urged to follow such an agile philosophy of Roadmap implementation, geared towards bringing about tangible customer improvements ahead of the 2025 milestones.

To support the Roadmap Actions it was recommended in previous CEO meetings that more railways join and use the data management services of the sector-led TAP TSI Services Governances Association (TSGA)⁵. This would allow it to leverage on additional established sector work and to better link Roadmap activities with European ticketing regulation obligations, which the railways are subject to anyways. The TSGA is stipulated in the TAP TSI Regulation and was founded as a not-for-profit legal entity (a Belgian “aisbl” like CER) by the sector as a response to regulatory obligations related to certain reference data that are also key for the success of the Roadmap. It is managed by several RU representatives who are also deeply involved in the Roadmap. The TSGA founding members, in 2016, were DB, SNCF and Trenitalia. CFL, DSB, NS and SBB have joined since.

The community is grateful that with MÁV-Start and ÖBB two more railways have meanwhile joined the TSGA. More RUs are encouraged to follow suit.

3.4. Concerted Effort

The survey respondents reiterated previous remarks about the dependencies on third parties and required stakeholder support to help facilitate Roadmap implementation and overcome barriers to implementation.

Suggestions were made specifically regarding:

- a) European Commission and ERA
 - Refrain from legislative proposals that impose new or conflicting requirements that may jeopardize railways’ efforts and investments already made;
 - Support OSDM as the technical enabler for easier booking of international rail tickets, and ultimately, of multimodal journeys.
- b) Sector bodies (Action Owners, Ticketing Task Force, rail sector associations)
 - Foster dialogue, alignment and synchronization between multilateral working bodies and RUs as well as between RUs;
 - Take the diversity and specificities of CER passenger RUs, for instance of open-access international high-speed operators, into account.
- c) Others
 - National governments to support the Roadmap consistently and refrain from contradictory or additional legislation in that field;
 - National bodies and stakeholders to align national standards and requirements with the Roadmap; overcome the patchwork of conflicting national or even regional approaches and solutions.

⁵ Also cf. <https://tsga.eu/>

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Meeting the quality and timeline goals of the Roadmap will greatly benefit from a concerted effort, building on the CER members' commitment and the recommendations presented to and endorsed by their CEOs.

About CER

The Community of European Railway and Infrastructure Companies (CER) brings together railway undertakings, their national associations as well as infrastructure managers and vehicle leasing companies. The membership is made up of long-established bodies, new entrants and both private and public enterprises, representing 78% of the rail network length, 81% of the rail freight business and about 94% of rail passenger operations in EU, EFTA and EU accession countries. CER represents the interests of its members towards EU policy makers and transport stakeholders, advocating rail as the backbone of a competitive and sustainable transport system in Europe. For more information, visit www.cer.be or follow us on Twitter [@CER_railways](https://twitter.com/CER_railways) or [LinkedIn](https://www.linkedin.com/company/cer).

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