



**BEUC** The European  
Consumer  
Organisation

# Railway to (consumer) heaven

Executive Summary of BEUC report on  
an “EU Masterplan for Rail



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### **BEUC, The European Consumer Organisation**

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## Is rail all about investment?

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

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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.

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.

## **BEUC research identifies consumer needs when taking the train and provides recommendations to policymakers**

Our report is intended to inspire the next Commission mandate and give policymakers ideas on how to attract more consumers to rail. It provides concrete recommendations, from quick fixes to long term reflections, based on evidence gathered between 2023 and 2024 by eleven of our member organisations<sup>8</sup> across the EU.

The main recommendations emerging from our research are presented in three main chapters, reflecting a timeline of actions to be undertaken by the European Commission and Member States after the 2024 EU elections, as part of **an ambitious, EU-led Masterplan for Rail. Strict EU oversight and Member States' engagement are paramount to make this work.**

A European Masterplan for Rail is a perfect fit in a political context where the focus should be put on making the Green Deal real and defining the necessary measures following the 2040 Climate Target Communication. 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.

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<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> 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.

## 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

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

## BEUC RECOMMENDATIONS

### 1 Make cross-border rail options visible and available to consumers

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.

### 2 Adopt truly effective cross-border passenger rights

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.

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

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.

## **4 Improve rail timetables and their coordination for cross-border trips**

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.

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

### **BEUC RECOMMENDATIONS**

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

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.

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 Engage with Member States – learn from each other, coordinate, invest**

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.

## **3 Bring creative financing in – facilitate the purchase and lease of rolling stock**

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.

## **4 Make it work – empowering the European Railway Agency**

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.

## 5

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

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**

### **BEUC RECOMMENDATIONS**

## 1

### **Make more funds available for the completion of the TEN-T network and prepare a massive investment plan for a consumer-friendly rail system**

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.

## Main findings of BEUC research reveals a complex picture

Is there such a thing as a “perfect” railway 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 consumers’ experience with rail, 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 railway systems also offer levels of service in certain respects that could inspire other countries or be supported and extended on a European scale.

### 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. Finally, the high-speed line 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).



## 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.

### 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.



## Ticketing, multimodality and pricing

### The bad

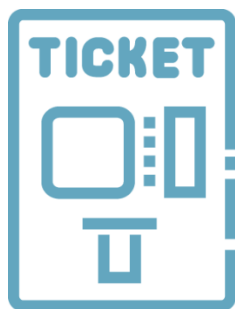
Ticketing is the pain point across many countries. Admittedly, there is some integration at national level where a multimodal system has been put in place. And yet, this is not the case everywhere (combining local transport with regional trains is not possible in Hungary or Portugal, for example). However, accessing all timetables and fares is close to impossible. Should a consumer be on holiday or crossing a

### 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

country that is not theirs, the chances that they can find the best fares and the best itinerary are very small.



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.

## 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.

### The very good

- New trains in Slovenia provide Wi-Fi to all passengers without restrictions.
- In Slovenia’s trains or in Denmark, the bike fee is much lower (free of charge in the

- 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.

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.



## Cross-border trains

### The bad

- Clear missing links and degradation of pre-existing situation have been reported, notably in Greece and Portugal.
- A lack of frequency and 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

### The very good

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



accordance with maintenance works foreseen by national infrastructure managers. This has notably been flagged in France where the infrastructure manager seems to not cooperate smoothly with operators other than SNCF.

## Night trains

### The bad

- Some new night train operators rely on old rolling stock, making them rather uncomfortable or unsuited for passengers with a disability.
- Regarding the accessibility of tickets, once again there is a lack of information and ticketing options. As our Dutch member notes: “[Both] night train services appear on the website of the incumbent operator, but no price information or information how to book is provided.”

### 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.



## 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 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%.