

Report

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CER Ticketing Roadmap – 5th Implementation Monitoring Report Autumn 2024

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1. Summary

Highlights:

- Thanks to the ongoing implementation of the CER Ticketing Roadmap ("Roadmap"), European rail passengers will continue to benefit from improvements in the course of 2025.
- Passengers already benefit from Roadmap achievements to date when traveling across the Single European Railway Area, for instance from
 - More up-to-date timetable information: Most railways already upload their timetables to a central database at least weekly, thus significantly improving timetable accuracy and reliability
 - Extended booking horizons: Several railways already enable passengers to book rail tickets more than six months in advance, at least for specific services
 - Improved bookability of multi-carrier journeys: Passengers can book a continuously growing number of cross-border journeys that involve more than one railway
 - Enhanced cross-acceptance of online tickets: A substantial number of railways - and 50% more than in the previous report - are already able to "read" a ticket issued by another railway thanks to the Electronic Ticket Control Database (eTCD)
 - Better care in case of missed connections: Well over half of the CER members already subscribe to the Agreement on Journey Continuation (AJC), which offers practical journey continuation to passengers in case they miss their connections due to major delays and disruptions.
- Multilateral solutions, notably OSDM and eTCD, are fully available and individual implementation by the railways is ongoing. This will entail major improvements to the booking experience as notably OSDM, an important technical enabler, is being rolled out by more and more railways.
- A custom-built new real-time information exchange platform has been developed and is currently being tested. Once fully operational it will provide consistent real-time journey information across services in the Single European Railway Area.
- LTG Link will join the Agreement on Journey Continuation as from April 2025, making it the Agreement's 21st member railway and extending its application into the Baltics.
- Additional focus in 2025 will be on detailing and approving the work programme for the Roadmap's second phase (2026-2030): Strengthen rail in the multimodal context and improve the rail passengers' experience in multimodal journeys.

The Ticketing Roadmap ("Roadmap") is a high-priority initiative of the CER members. It was launched by the member railways in autumn 2021 and has since been high on their CEOs' agendas. 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 along the passenger experience from pre-journey information to support during delays and disruptions. Quality 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 European Commission's policy agenda, especially its aim to make digital booking and ticketing easier. Delivering the key milestones of the roadmap by the end of 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 significantly improved European ticketing experience.

Since the adoption of the Roadmap by the CER General Assembly in late 2021 concrete actions have been pursued both on a common level and on an individual railway level. Implementation work is in full swing; 2025 is the year of delivery.

To appraise implementation progress and to identify areas that need additional attention, the CER passenger railways are surveyed twice a year. Results are regularly presented to the CEOs at the CER General Assemblies. The report at hand presents a summary of the fifth such survey performed in November and December 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 18 February 2025. 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.

Survey turnout has again been high, and even further increased. Of the 29 CER member railways with passenger operations in the EU,

- 25 (i.e. 86%) have participated
- representing nearly 97% of CER members' intra-EU passenger traffic
- covering rail traffic in and between 22 EU Member States with rail operations on the Continent as well as the Eurostar operations to and from London.

Implementation monitoring coverage continues to be highly representative, both in terms of geography and in terms of ridership.

Roadmap delivery remains largely on track. Multilateral solution development is nearing completion. Their implementation by the survey respondents individually is progressing well. Individual implementation timelines have been largely reconfirmed. The few delays reported are being mitigated between railways in question and the central project team.

Responses to the fifth survey also reconfirm a solidly high awareness and confidence level by the participating railways. The number of inconclusive answers to what needs to be implemented is minute.

Major progress has been made by building a new real-time information platform; testing is ongoing. This platform will enable railways to share real-time data and integrate in a consistent manner with third-party systems, enhancing passengers' access to information across the European rail network.

Some good progress has been made by railways extending, for instance, booking horizons for certain services and product categories - unilaterally or in partnership with neighbouring operators. Railway CEOs have been asked to encourage additional such efforts with a goal to materialise in 2025.

Implementation of the Online Sales & Distribution Model (OSDM) remains a key technical enabler for several of the Roadmap's goals. In Sweden, one of the most competitive and open rail markets in the European Union, OSDM was rolled out countrywide in 2024 as the standard for national ticket distribution, both for rail ticket retailers and distributors. The other CER member railways, too, are investing into their OSDM readiness, by enhancing their sales and distribution systems. Project maturity differs from railway to railway, but important achievements will be communicated during the year. Use cases so far

demonstrate that OSDM, as a neutral, open and publicly available standard created by the rail sector in close collaboration with third party ticket vendors, is interoperable with other standards such as NeTeX for timetable data.

Lithuanian CER member LTG Link have announced to join the CIT Agreement on Journey Continuation (AJC) as from 1 April 2025. The AJC provides care to passengers on multi-carrier journeys in case of major delays and disruptions. LTG Link will join the ranks of 20 other railway companies¹ in this key Roadmap initiative. Consequently, LTG Link passengers will ultimately 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. The AJC represents over 90% of CER members' passenger traffic in the EU. CER invites and expects more railway undertakings to join, further fulfilling the goal of passenger protection across the EU.

CER and CIT members are, together with the UIC, also making progress in digitising their services by combining technical enablers for booking (OSDM, cf. above), timetables (MERITS), real-time information and online ticket status (eTCD). The number of railways that have already implemented eTCD has increased by 50% since the previous report. Work in all areas mentioned 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.

The survey responses at hand remind of the dependence on third parties such as infrastructure managers and national authorities for some of the Roadmap actions. The extension of booking horizons and the harmonisation of ticket conditions are particularly dependent on alignment with third parties, despite all efforts by the operators to accept, for example, a degree of additional commercial risks by unilateral improvement initiatives. 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 collaborate with the railways to extend such lighthouse initiatives to other RUs and to share best practices. Moreover, 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. This remains an important ongoing task, where the European institutions could facilitate by way of their regular interaction with Member States.

The next implementation progress monitoring survey will be carried out in April/ May this year. A report will then be done to highlight the Roadmap 2025 achievements and residual tasks, if need be.

2. Background and Purpose of this Report

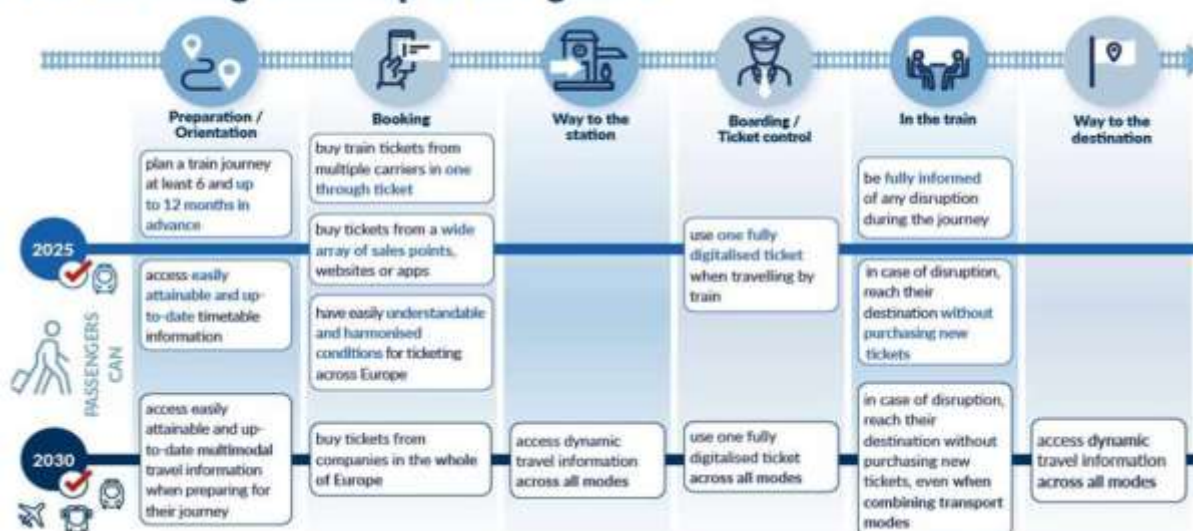
CER Ticketing Roadmap

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

¹ As of April 2025, the following companies will be members of the AJC: BLS and SBB, CD, CFL, DB, DSB, Eurostar (including Eurostar International Limited and THI Factory), GYSEV and MÁV-csoport, HŽPP, LTG Link, NS, ÖBB, PKP IC, Renfe, SJ, SNCB/NMBS, SNCF, SZ, Trenitalia, ZSSK.

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 and of course they expect continuous 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 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 API² 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

² Application Programming Interface that allows IT programmes to communicate with each other.

To make this a reality, the CER Ticketing Task Force³ 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 a key part in these sector associations' work programmes.

As a reminder, it was foreseen from the outset that the Roadmap shall address additional dimensions of European rail travel, focused on rail in a multimodal context, once the 2025 milestones have been achieved. The Ticketing Task Force is working to define the pertinent work programme geared to 2030.

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 fifth such report. The key findings and recommendations were presented in detail to, and endorsed by, the General Assembly on 18 February 2025.

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

3. Key Survey 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 throughout 2024.

The CER Ticketing Task Force is now made up of representatives from 15 RUs plus from CER and CIT, and is furthermore supported by UIC and FTE.

25 of the 29 CER passenger railways have participated in the fifth bi-annual monitoring campaign. This represents a solid turn-out. All responding railways have participated in at least one of the previous surveys. Three fifth have taken part in all five rounds. The results presented in this report can be considered authoritative and representative for the CER constituency at large.

The participating railways' internal projects are widely operational, and the RUs are implementing these to plan. An increasing number of railways report completion of specific elements of the Roadmap, especially regarding improved timetable and tariff data (notably by way of increased data upload cycles). This is in line with their previous planning.

Thanks to the Roadmap, European rail passengers will experience a solid amount of additional 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 sufficiently mature. It is also recommended that implementing railways follow an agile approach wherever possible. For example, increasing booking

³ The CER Ticketing Task Force consists of representatives from ČD, DB, MÁV-csoport, NS, ÖBB, PKP Intercity, Renfe, SBB, SNCF, Trenitalia, Trenord, VR and ZSSK and is supported by CER, UIC and CIT.

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, in line with project planning. 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 fifth bi-annual 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,
- UIC Electronic Ticket Control Database (eTCD) for cross-RU ticket inspection,
- CIT Agreement on Journey Continuation (AJC),
- And, since the previous report, the new real-time information exchange platform developed under the auspices of the UIC to facilitate the exchange of real-time traffic data between railways and between railways and third parties. The platform was built according to a UIC standard that was purpose-made under the Roadmap.

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 still 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. This will gain additional traction in the course of 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 has been made and will continue to be made in 2025. Further improving data quality and consistency needs ongoing attention, also post-2025.
2. Booking horizon	Progress with pragmatic and bilateral solutions. Major step-change dependent on implementation of the TTR ⁴ initiative.

⁴ Timetabling & Capacity Redesign for Smart Capacity Mgmt., a joint IM/ RU initiative to reform the sector's approach to European rail timetabling and capacity management.

	<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, also post-2025.</p>
4. Standardized API	<p>Solution in place (OSDM). SJ already live. More implementations on-going and planned during 2025.</p> <p>Long-term acceptance by the EU institutions of OSDM as a standard is key for the timely improvements for passengers that RUs and ticket vendors are about to realise.</p>
5. Harmonization of ticketing conditions	<p>Common development of solutions to this broad-scope Action remains in focus.</p> <p>Dependency on third parties (notably national bodies) presents a challenge; overcome this consistently presents a major challenge. Therefore, further alignment with national stakeholders needed.</p>
6. Digitalization of tickets	<p>Implementation by RUs has increased by 50% since the previous report: 9 RUs are already compliant.</p> <p>Action's benefit as a technical enabler for Action 8 has been recognised and is advanced by the UIC and CIT.</p> <p>Additional focus of multilateral work is on incremental improvements, also post-2025.</p>
7. Real time information	<p>New data exchange platform being tested, connections by individual railways and groups of RUs to be made in the course of 2025.</p>
8. Support during disruptions and delays	<p>Agreement on Journey Continuation (AJC) is prime example of CER member collaboration, subscribed to by an additional RU (LTG Link) as from April 2025, adding Lithuania to the AJC map.</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 RUs are urged to continuously follow such an agile implementation philosophy, geared towards bringing about tangible customer improvements within the 2025 milestone.

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, <https://tsga.eu/>). It was founded as a not-for-profit legal entity 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, MÁV-csoport, NS, ÖBB and SBB have joined since. 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. More RUs are encouraged to join as a member.

3.4. Concerted Effort with Stakeholders

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
 - Support OSDM as the technical enabler for easier booking of international rail tickets, and ultimately, of multimodal journeys.
 - Refrain from legislative proposals that impose new or conflicting requirements that may jeopardize railways' efforts and investments already made or on-going.
- 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.

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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