

Bicycle Transport on Long Distance Trains in the European Union

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1.1 Management Summary: Reasons

The present study has been commissioned and financed by the **European Cyclists' Federation**, an umbrella organization representing 45 national member associations from 33 countries. The main goal of the European Cyclists' Federation is the promotion of the bicycle at European as well as international level and create a favourable climate in transport, environmental and tourism policies

Why this study?

- **Bicycle use is increasingly popular in Europe** and bicycle tourism is one of the most rapidly growing sectors in European economy.
- **Bicycle transport is a relevant issue** for the further development of the bicycle usage in Europe, allowing an optimal intermodal combination of friendly modes of transport and the creation of efficient mobility chains.
- If bicycle transport is already widespread in local and regional rail transport, the recent evolution of **long distance rail transport has not considered the needs of customers with bicycles** and has caused a relevant decrease of the offer and of the bicycle transported on long distance trains in the EU in the last years.
- **Several national and European bodies have recognized the relevance of this issue.** Among them, the European Parliament which has asked for bicycle transport facilities on long distance trains within the Regulations for Sustainable Tourism as well as in the Third Railway Package.

1.2 Management Summary: Goals

- **Both railway operators and the railway industry have in many cases not yet seriously considerate this issue, as it has happened in the automotive and airplane sectors.** Supposed disadvantages deriving from seasonality, reduction of capacity, delays at stations are often the consequence of an "a priori" closure toward the bicycle transport, without a global analysis of the opportunities and the challenges of this issue.
- **This is proved by the contradictions in the policies adopted by different operators** and by the presence of an increasing number of operators successfully allowing bicycles on long distance and high speed trains.
- In order to **stimulate a further debate on these issues**, the ECF has carried out a market analysis aimed at a deep knowledge and evaluation of the EU market for bicycle transport on long distance and international trains. This analysis involves technical and political aspects and provide useful elements for the further discussion of this issue at European level, with particular reference to solutions allowing the bicycle transport on High Speed Trains.
- Consequently, **this study has not been primarily thought as a timetable for bicycle users.** However the analysis follows the point of view of the final customer and contains interesting information also for the bicycle user.
- The content is based on **ECF internal know-how**, analysis of public available documents, information from Customer Offices of railway operators and rolling stock producers, united with the technical support of the German railway consulting company SCI Verkehr GmbH.
- **This study has been co financed by the European Commission.**

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2.1 Aim of the study

The aim of this study is:

- *to give an **overview** and an **evaluation** of the **current market***
- *to present the **relevant conditions** for developing the bicycle transport on long distance trains.*
- *to work out **development scenarios** for the **policies** and **technologies** being operated*

2.2 Object of the study

- The main focus of this study is on products and services of the **long distance railway passenger transport companies** in the **European Union (EU 25), Switzerland and Norway**. Long distance railway services include both national and international, as well as days and night services.
- **Bicycle rent, bicycle as unaccompanied luggage as well as bicycle of dismantled bicycles are not considered in the current study.** Due to the relevant differences in the demand and in the supply of these services, they have to be considered as complementary and not substitutive markets.
- **Regional railway services are not considered in this study.** This is mainly due to the fact that in the EU bicycle transport on local and regional railway services is all together satisfactory. Exceptions in particular countries or operators are a local issue that has to be handled with the involved regional transport authorities and operators.
- **Infrastructural services at stations are also not handled in this study.** They are competence of the station management bodies and also in this case a relevant role can be played by local authorities of the place where the station is located.

However, a clear separation among the different services is not always possible (for example ticket machines selling both long distance and regional tickets), so that it makes sometime sense to consider the railway system as a whole.

2.3 Methodology of the study: 4 categories (areas)

The core of the study is an analysis of **32 railway undertakings (RUs) offering long distance railway services** (Chapter 4). In order to achieve a comparable overview and evaluation of the services offered by the various operators, the study focuses on following **four categories**:

- ***Carriage Offer***: availability of bicycle carriage on long distance operated services. If operated, both high speed and international services are separately considered.
- ***Ticket and Reservation Schemes***: available ticket and reservation schemes in national and international long distance transport.
- ***Sales Channels***: availability of tickets and reservations at manned counters, automatic machines, online as well as through other channels (telephone, on board)
- ***Website Information***: availability of bicycle carriage query in timetable search engines and of information about bicycle carriage condition in country's and foreign languages. Information about the UIC Webpage Railpassenger.info as well as content of the information delivered to that website is also analyzed.

Each RU is then consequently evaluated according to **16 common indicators**, thus summarizing the complexity and variety of services offered by long distance RUs in Europe (bigger and smaller RUs, active countrywide or only on few relations, offering one or more categories of services).

2.3 Methodology of the study: 16 indicators

Carriage:

- *Availability of bicycle carriage on all train categories*
- *Availability of bicycle carriage on all train services*
- *Availability of bicycle carriage on High Speed Trains*
- *Availability of bicycle carriage on some international services*
- *Availability of bicycle carriage on some national services*

Sale (grouping "Ticket and Reservation Schemes" and "Sales Channels" categories):

- *Availability of bicycle space reservation when not compulsory*
- *Availability of bicycle ticket at automatic counters*
- *Availability of bicycle ticket online*
- *Availability of bicycle reservation at automatic counter*
- *Availability of bicycle reservation online*
- *Availability of free bicycle carriage*
- *Availability of bicycle international ticket*

Website:

- *Availability of timetable search engine with bicycle carriage query*
- *Availability of online information about bicycle carriage*
- *Availability of online information in English about bicycle carriage*
- *Availability of link to the Railpassenger webpage from the own bicycle webpage*

- For each indicator, the values **1**, **0** or **n** (not operated) are possible.
- The **area values** are a weighted arithmetical average of the numerical values (the carriage offer is weighted twice, due to the particular importance of this area).
- The **final values** are the sum of the area values.

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3.1. The European Market – Carriage Offer

- **Long distance railway passenger transport is basically a national issue.** Even there, where the European Union has tried to create an European framework, this has happened through directives which have been applied in different ways by the national countries.
- **Long distance services in Europe are offered by national operators.** International services are in the most cases offered by joint-ventures or regulated by bilateral agreements.
- **International railways' organization** (like UIC, CER, CIT, ...) are expression of the national railway companies and are mostly not able to efficacely intervene in their decisional processes. There are not international norms or guidelines concerning the organization of bicycle transport.
- The result is a **confused product policy**: different companies adopt different rules and offer
- Specifically concerning bicycle transport, two other aspects have to considered:
 - ***Bicycle transport policies** are mostly based on emotional decisions without market analysis*
 - ***Train producers** have not developed innovative systems for bicycle transport (see next page the „High Speed Train” issue and Chapter 5)*

An organic and attractive European transport offer is still missing. Only few long distance connections allow bicycle transport, resulting in lack of connections or unacceptable travel times.

3.1 The European Market: Examples of carriage offer

Relation	Without bicycle carriage	With bicycle carriage
Paris - Amsterdam	16 daily; min duration: 4h11m	8 daily; min duration: 12h12m
Vienna - Warsaw	4 daily; min duration: 7h27m	2 daily; min duration: 29h01m
Milan - Luxembourg	16 daily min duration: 8h49m	1 daily; min duration: 11h46m
Prague - Brussels	8 daily; min duration: 10h58m	1 daily; min duration: 14h35m

3.2. The European Market – Ticket and Reservation Schemes

- National long distance railway passenger transport is **based on national tickets and reservations schemes**. Bicycle tickets and reservations are normally not sold online nor by other companies.
- An **International Bicycle Ticket** has been created within the International Passenger Tariff (TCV): it is sold and accepted by only 10 European RUs (OBB-SNCB-CD-DB-DSB-CFL-MAV-NS-ZSSK-SBB). Its price varies from 5 to 12 Euro, depending to the selling RU.
- Other **RUs may issue other international tickets**, often valid only on international trains and not to the final destination.
- International tickets like **Interrail, Eurodomino and Eurail** do not consider the bicycle carriage.

3.3. The European Market: Sales Channels

- **Sales Channels are controlled by the national RUs.** Some few companies, mainly in the UK, offer free bicycle carriage with free compulsory reservation.
- Bicycle tickets and reservations are **often not available at automatic counters nor online.**
- It is **normally not possible to purchase a bicycle ticket and/or reservation for a foreign country**, even in the case of a return ticket.

3.4. The European Market: Website information

- The UIC maintains the Webpage **www.railpassenger.info** offering among other information for passengers with bicycles in the main EU-countries. Information is provided directly by the railway undertakings on voluntary basis. As a result, information is often generic, some RUs are not listed; others (Renfe, ZSSK) provide only a direct link with the own webpage offering information in the country language. Strategic information like an online timetable with bicycle query and possibility of bicycle space reservation is also missing (see also 6.1).
- There is not an official European database. De facto many online timetables are based on **common Hafas database**. This database has a bicycle carriage query but the data are unreliable, because often wrong or incomplete (see 6.3).
- As a result, even there where there is a carriage offer, **information is often insufficient, incomplete or even wrong.**

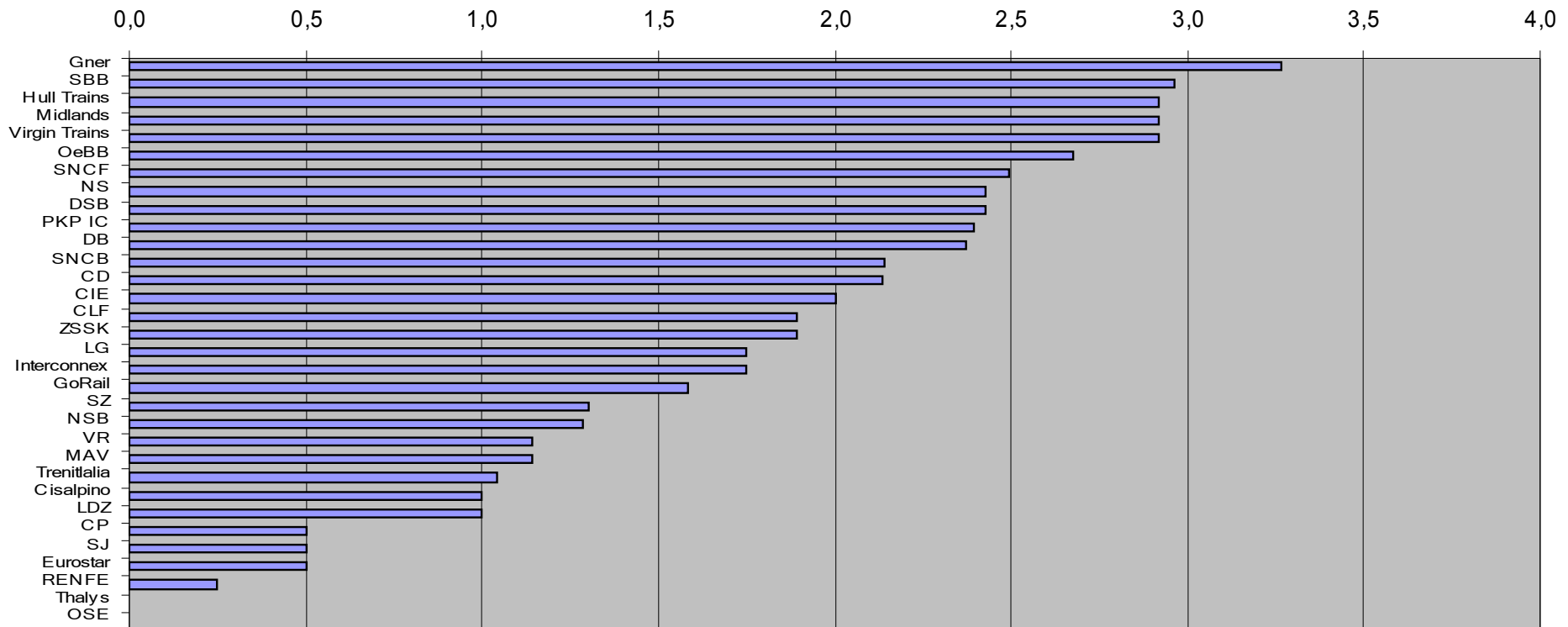
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4 Company Overviews

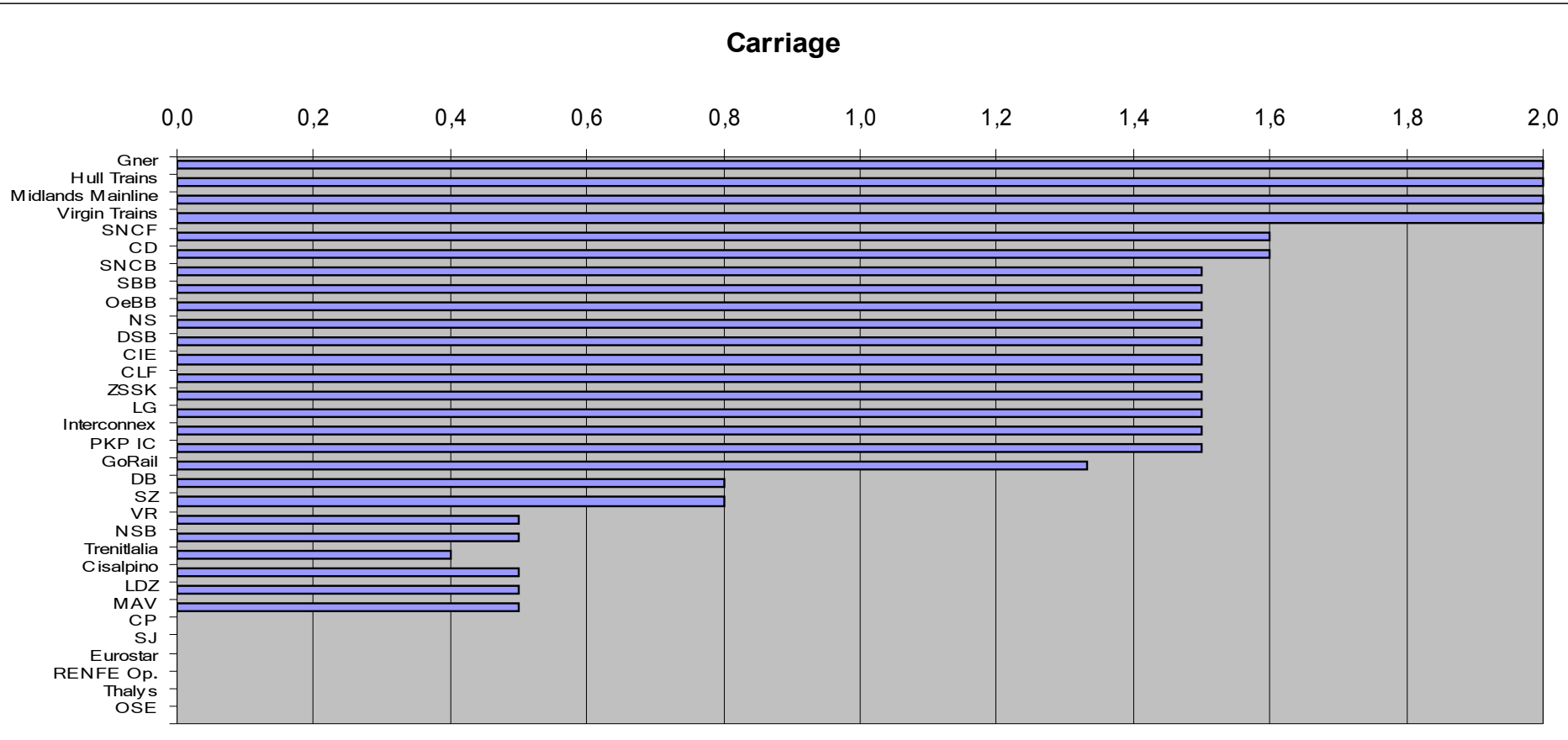
- This chapter contains reports from **32 European railway undertakings in alphabetic order according to the English countries and companies names.**
- *N.B: Some international relations are covered by Joint-Ventures owned by national railway undertakings (Artesia, Cisalpino, Elipsos, IntercityNightLines, Lyria, Thalys, ...). Cisalpino and Thalys play a relevant role in the contest of this analysis and are therefore considered separately from their shareholders. The other above mentioned Joint-Ventures are analyzed according to the countries in which the services are operated, jointly with the railway undertakings that provide traction and train drivers.*
- The following table describes the **comprehensive evaluation** of the 32 RUs: **GNER (UK)** is the most bicycle friendly long distance railway undertaking, followed by **SBB/CFF/FFS (CH)**. The list is closed by **Thalys (BE)** and **OSE (GR)**, where no bicycle carriage is possible and also sale and website information is unsatisfactory.

4 Company Overview: Comprehensive Evaluation

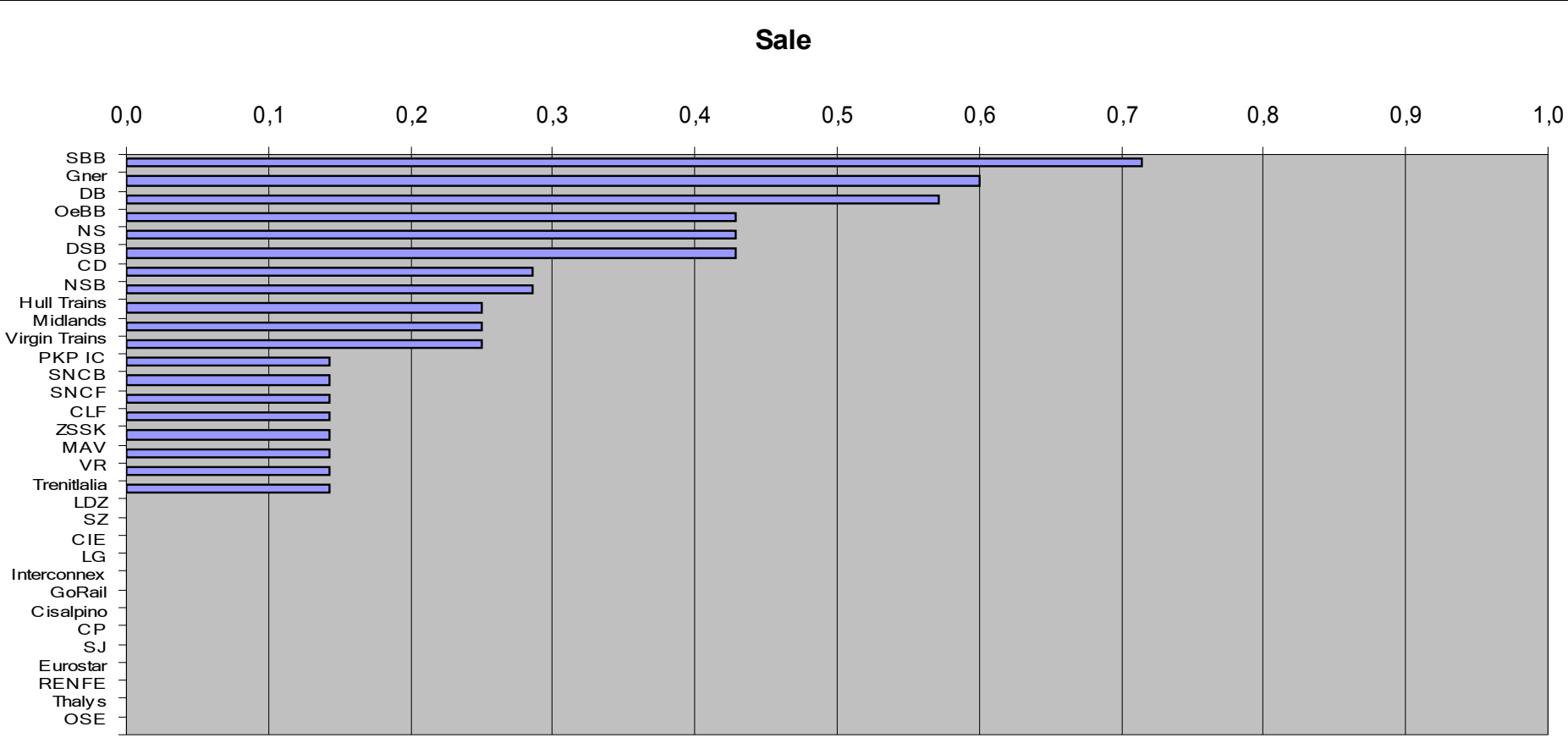
Comprehensive Evaluation (Carriage + Sale + Website)



4 Company Overview: Carriage

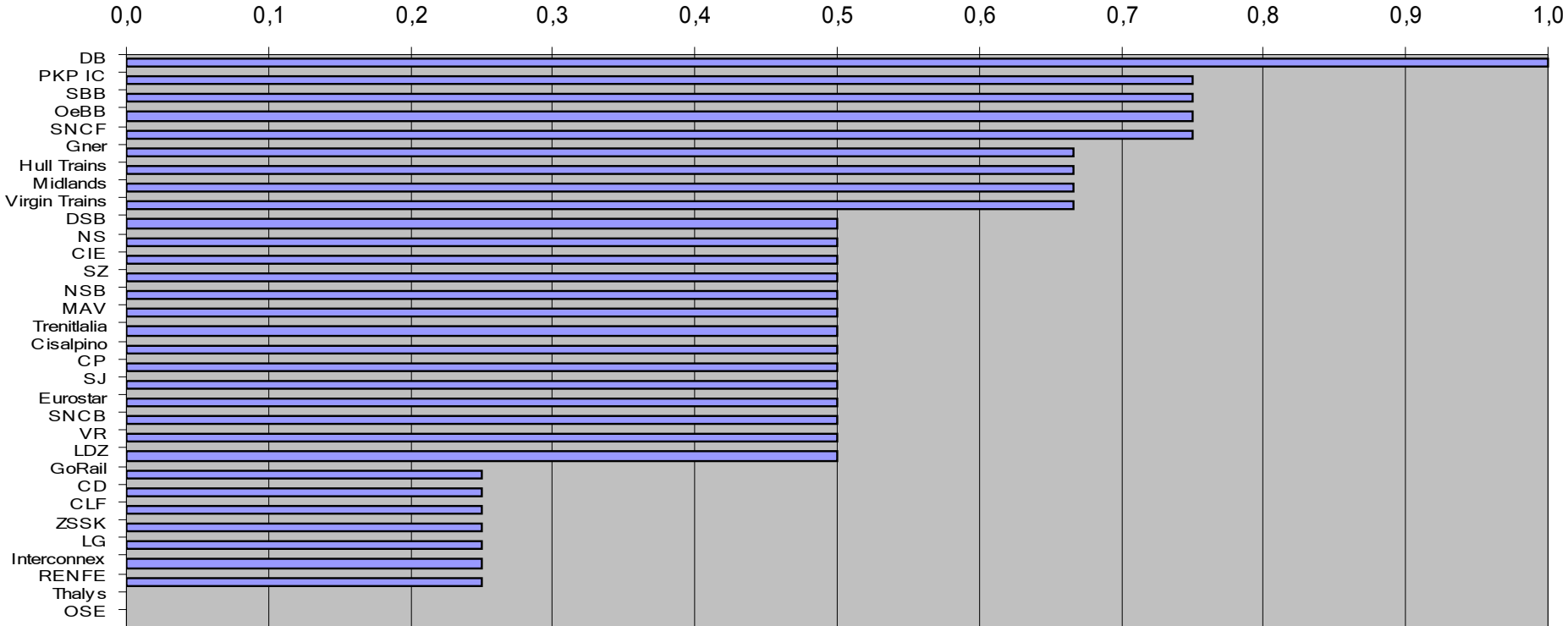


4 Company Overview: Sale



4 Company Overview: Website

Website



4.1.1 Austria (ÖBB): Carriage Offer

Conventional Trains: all four train categories - ÖBB EC/IC; EC/IC; D; EN - but not all train services allow bicycle carriage, with possibility of reservation.

High Speed Trains: German ICE-trains are operated between Vienna and several German cities. Hence, ÖBB has bought from DB in 2005 3 ICE-T trains, operated as "4011" on the relations Vienna-Munich and Vienna-Bregenz starting from December 2006. Further ICE-T trains will be operated by DB since December 2007 between Frankfurt/Main and Vienna. On these services, bicycle carriage is not allowed.

International Trains: around **40%** of long distance direct connections allow bicycle carriage. Reservation sometimes possible.

4.1.2 Austria (OBB): Ticket and Reservation Schemes

- A **bicycle daily ticket** in long distance transport costs Euro 6,80. The same ticket is valid also for tandems, trailers and tricycles. A regional transport daily ticket (Euro 2,90) can be upgraded paying the difference (Euro 3,90).
- A **free reservation** is recommended but not compulsory and has to be bought at least 3 hours before the train departure from the first station.
- **Week and month** tickets are available only in regional transport.
- The **special ticket** "1 Plus Freizeitticket" allows free bicycle carriage on EC/IC trains. A reservation can be bought for 5 Euro.
- **International bicycle ticket** costs 12,00 Euro.

4.1.3 Austria (OBB): Sales Channels

- Bicycle tickets are available at **manned counters**.
- Bicycle tickets and reservations are not available at **automatic machines** nor **online**. Only online request with post delivery is possible

4.1.4 Austria (OBB): Website Information

- **Timetable search engine:** available in German and English, with "bicycle carriage" query.
- **Information about ticket prices and reservation:** information available only in German. Bicycle ticket and reservation are not available online
- **Link to Railpassenger.info:** only from the German version of the Passenger Charter page. Not from the bicycle page.

4.1.5 Austria (OeBB) - Evaluation

6th place in the final ranking list, resulting from 7th in Carriage, 4th in Sale and 2nd in Website.

The main concern for the future is the consideration for bicycle carriage in the planned implementation of High Speed Trains (ICE-T and Railjet).

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5. Railway vehicles: overview

This chapter describes the **technical solutions** adopted by railway undertakings to allow bicycle carriage and explores **new trends** in the railway industry that may bring to the creation of innovative facilities for bicycle carriage on long distance trains.

There are two types of long distance trains:

- ***divisible train compositions** - formed by locomotive, several coaches and a second locomotive (or a driving trailer), which still constitute a relevant part of conventional Intercity trains and the totality of night trains.*
- ***blocked train compositions** - formed by multiple units, increasingly adopted on High Speed Train services*

New long distance trains are mainly purchased as multiple units, because they offer several advantages compared to locomotive-hauled trains (energetic efficiency, power distribution, comfort, ease in operation, ...). Traditional coaches are still purchased for Intercity relations (speed range 160–230 km/h). Even traditional locomotive-hauled trains are however increasingly operated as blocked composition, with the same coaches (and sometimes even the same locomotives) being always operated together. This allow a better rolling stock management and the elimination of cost- and time-expensive shunting.

5. Railway vehicles: bicycle carriage

Concerning the point of view of **bicycle carriage** it has to be noted that:

- ***luggage coaches** are progressively being eliminated and withdrawn; dedicated bicycle coaches are available only on some night trains;*
- *long distance passenger coaches are often fitted with **multifunctional spaces**, where also bicycles can be accommodated. Some companies, like PKP Intercity, allow bicycle carriage also without bicycle spaces, in the first and last vestibule of each train.*
- *multiple units have not been thought to offer bicycle carriage facilities, are "focused on businessmen, forgetting holiday and leisure customers". **Bicycle spaces, when available, have been retrofitted mainly directly by the RUs.** A reorientation towards these last categories is currently taken place.*

5. Railway vehicles: after-sale solutions

On High Speed Trains, some operators developed after-sale solutions:

- **SNCF** has transformed a technical space into four bicycle space with a cost of 6,604 Euro per train unit.
- **CD** has installed three vertical bicycle racks (similar to them adopted on car roofs) in one vestibule of each Pendolino train.
- **DB** decided 1994 to purchase ICE-2 and ICE-T with bicycle carriage facilities. This decision had been partially withdrawn, however between 1999 and 2002 ICE-T with bicycle facilities circulated between Stuttgart and Zurich. Since them, bicycle carriage is not possible on ICE trains
- **DB-Autozug and Trenitalia** are considering the possibility to carry bicycles on car carrying wagons
- **Thalys** is considering the creation of bicycle facilities in the frame of the announced fleet modernization

5. Railway vehicles: different policies

It is however interesting to note, that the presence or not of bicycle carriage facilities is not strictly depending from the type of rolling stock. Deciding is the approach of the RU towards bicycle carriage

This phenomenon is even more visible in divisible train compositions (coaches) where on some international trains bicycle carriage is allowed only to the border, even if the same are coaches travelling further.

	RUs not allowing bicycle carriage	RUs allowing bicycle carriage
Alstom Pendolino (ETR 460 and derived series)	VR (FI), Trenitalia (IT), CP (PT), SZ (SI), Cisalpino (CH),	CD (CZ), Virgin (UK)
Alstom TGV	Thalys (BE), Trenitalia (IT)	SNCF (FR), SBB/CFF/FFS (CH)
Alstom Eurostar	Eurostar	GNER (UK)

5.1 Railway vehicles: new rolling stock

New long distance conventional and high speed rolling stock is produced by few big companies with worldwide presence. In Europe are active mainly Alstom, AnsaldoBreda, Bombardier and Siemens. After an historical phase, where the main players cooperated to the development of new products (ETR 500, ICN), currently every producer is independently active on the market.

Alstom

- **passenger coaches:** not produced
- **multiple units:** **Coradia** regional platform up to 200 km/h; **Pendolino** (tilting and non-tilting) platform (450, Alaris; the new generation will be delivered to Trenitalia and Cisalpino in 2007). **TGV** (including Thalys and Eurostar) is the Alstom High Speed Train; a new generation called AGV is in preparation. Only Coradia is offering bicycle carriage as optional equipment. Some Pendolino and TGV have been adapted by the operators.

AnsaldoBreda

- **passenger coaches:** not produced
- **multiple units:** DMU IC4 for Denmark, EMU72 for Norway in conventional segment. ETR 500 and the new HSA train due to operate the Amsterdam-Antwerp-Brussels High Speed Line.

Bombardier

- **passenger coaches:** IC2000 for SBB and I11 for SNCB/NMBS
- **multiple units:** AM96, Contessa, Regina, Turbostar, Voyager and Meridian in conventional transport. In High Speed Train segment Bombardier has the experience of the Swedish X2000 as well as involvement in several projects (like the German ICE and the Italian ETR 500). It is currently developing a new train, named Zefiro

Siemens

- **passenger coaches:** are based on the Viaggio platform and are available as single- and double-deck coaches. The modular design of the coaches offers a huge number of design options, included bicycle carriage facilities. Viaggio coaches will be operated by ÖBB as Railjet up 2008. Hence Siemens offers passenger wagons for night trains.
- **multiple units:** as upgrade of the ICE3, Velaro is the High Speed Train platform. Venturio is the platform for conventional Intercity trains. Despite high flexibility, bicycle carriage facilities are not foreseen.

Other constructors

- Other relevant constructors active in the production of long distance rolling stock in Europe are the Spanish companies CAF (multiple units in Spain and Turkej) and Talgo (producing multiple units as well as passenger and night train coaches segment). They do not offer bicycle facilities as standard equipment.

5.1 Railway vehicles: modernization of rolling stock

The average life cycle of a railway vehicle is around **30 years**. During this life cycle, there is at least one **main interior modernization**: seats and interior lining are completely removed and substituted, new lay out and design solutions are adopted, electrical and communication systems are updated. After such a modernization the interior is completely new and comparable to a new railway vehicle. One or two **additional internal refreshments** are common in the life cycle of a railway vehicle.

In the frame of deep vehicle modernizations - like the undergoing renewal of the German ICE-1, the recently concluded of 900 Italian Trenitalia's Intercity coaches, the planned modernization of Thalys multiple units - the **introduction of bicycle facilities should be considered already in the planning phase**.

5.3 High Speed Trains: not only business customers

High Speed Trains are gradually replacing traditional long distance railway relations: in some EU countries (Belgium, France, Germany) the High Speed Train market share is **already above 50%** of the comprehensive long distance railway offer.

Several EU countries are actively investing in High Speed Train connections. In many cases the infrastructural efforts are financially supported by the European Union in the frame of the Trans European Network. According to the European Commission the network should increase from 3200 km in 2003 to 7500 km in 2010.

The High Speed Train offer is increasingly extended on the European core railway network, with conventional trains remaining as feeder services. Only the consideration of High Speed Trains guarantees timetable connections and attractive travel times.

This increasing integration of High Speed Trains in the comprehensive transport offer, the necessity of the RUs to find new customer targets, the lowering of ticket prices due to the concurrence of cheap airlines **are reducing the "exclusivity" of High Speed Trains. They are increasingly used by new targets of customers,** with beneficial economical effects for RUs. This trend will continue in the next years on the example of the Asian countries where High Speed Trains are used much more often by commuters and their share of first class seats is much lower than in Europe.

5.3 High Speed Trains: not only business customers

All in all, **the introduction of High Speed Trains has not considered the increasing trend in bicycle usage in Europe.** As a result, there has been in the last 10 years a rapid decrease of the offer replacement of traditional Intercity connections.

The trend is very visible in **Germany**, where following the replacement of IC trains with ICE trains, the number of bicycles carried by DB in long distance transport has dramatically declined. As a result many bicycle tourists are finding other ways: DB had 145 million passengers in 2000 and only 117 million passengers in 2004 (-20% in 4 years). A similar trend is clearly noticeable in several European countries.

It is not only a problem of bicycle transport: High Speed Trains have too small compartments for **big pieces of luggage or baby prams.** Train producers are starting to recognize the problem and are promising a **new generation of more flexible trains.**

Year	Bicycle carried by DB in long distance services	Reduction compared to 1995
1995	629,000	0%
1998	525,000	17%
2001	340,000	46%
2002	312,000	51%
2003	270,000	57%

5.3 High Speed Trains: flexible solutions

Convertible seating concepts are already common in the automotive sector: united to flexible interior designs and bicycle transport accessories, these solutions (Flexi-fix, Radfazz, Easy-Flat ...) are responding to the increasing demand of bicycle transport



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6.1. Railway organizations: UIC

UIC, CER and CIT are formally three separate organization but they can be seen as three parts of an unique body.

The **International Union of Railways** (UIC) is the world-wide organisation for international cooperation among railways and promotion of the rail transport mode. It groups 171 members on all 5 continents and is located in Paris.

- *The only body directly dealing with bicycle issues is a UIC "**Train +Bicycle Working Group**" set up in 2003 in the context of the dialogue with European consumer associations (among them the ECF) on implementation of the Passenger Charter. The goal was to better inform target customers about international travel possibilities for passengers with their bicycles and to harmonize the product. Due to very low participation (5 participating RUs: SBB/CFF/FSS, DB, SNCF, MAV, ÖBB) and lack of effective decisional power, the working group has had a very limited field of action.*
- *The only noticeable result has been the creation of the webpage **www.railpassenger.info** with information on bicycle transport in Europe (see also 3.4). Information here are however very generic, uncompleted and without any efficient coordination and lay-out work. Much more useful is for example the "**Cycling by Train**" guide edited regularly by the UK National Rail Enquiries (www.nationalrail.co.uk) with the sponsoring of Brompton cycles: a very simple and practical leaflet with all necessary information. It is today not clear which will be the activity of the UIC working group in the future.*
- *Other UIC working groups (price, rolling stock, ...) are dealing from time to time with the bicycle carriage issue, up to now without noticeable results._*

6.1. Railway organizations: CER and CIT

The **Community of European Railway and Infrastructure Companies (CER)** brings together 54 railway undertakings and infrastructure companies from the European Union and other European countries. CER can be considered as an "UIC embassy in Brussels", taking care of lobbying and public relations with the EU bodies and with the customer organizations like the ECF.

- *CER organizes twice a year meetings with consumers' organization, dealing mainly with the **CER/CIT/UIC Rail Passenger Charter issue (which doesn't consider the bicycle)** and connected issues. Requests are mainly forwarded to the competent UIC working groups.*
- *Bicycle has only been officially mentioned in two press releases (09.2005 and 01.2007) when CER has official critiqued the request of the European Parliament for bicycle transport on European trains contained in the first approval of Third Railway Package.*

The **International Rail Transport Committee (CIT)** aims to achieve the uniform application and practical implementation of the intergovernmental Convention concerning International Carriage by Rail (COTIF) with standardization of the legal relations between customers, railway undertaking and infrastructure operators. COTIF has not a direct relevance for bicycle carriage but it constitute the premise for the **TIV and the international bicycle ticket** (see 3.2).

6.2. Political organizations: the European Parliament

The European Parliament has repeatedly recognized the necessity to improve the condition for bicycle carriage on long distance trains in the European Union.

- *On **22.09.2005** the European Parliament has concluded the first reading of the Third Railway asking that railway undertaking "shall transport the bicycle of the passenger in all trains, including transborder and high speed trains, possibly on payment of a charge. The contract must be confirmed by one or more tickets issued to the passenger". The Third Railway Package has been modified by the European Council; a second reading in the Parliament is foreseen in late 2006.*
- *On **08.09.2005** the EU-Parliament has also voted in favour of the bicycle asking for bicycle carriage in all trains in the frame of a regulation of sustainable tourism with a resolution that "emphasizes the need to promote combined train and bicycle travel and considers the 'Eurovelo' network to be a good basis for this; also requests that railway enterprises allow bicycles on trains, including long distance and cross-border trains, as is already the case with the French TGV". This resolution has been forwarded to Council and Commission.*

The European Parliament is also engaged in the approval of a directive on Passenger Rights, that would indirectly affect also the bicycle carriage (ticket, reservation, information policies and rights).

6.3. Commercial organizations: HaCon

HaCon is not an international organization. It is a private German company, specialized in software solutions for transportation applications. Its main product is the **HAFAS timetable information system**, launched in 1989, is currently the leading timetable information system in Europe.

HAFAS has been adopted by several EU railway operators and provides the **timetables available online** and the **information delivered at counter desks**. HAFAS handles over 5 million enquiries per day, and can be accessed on a wide variety of platforms, from call centres to printed media, on the Internet or on the move via PDA or mobile phone.

The HAFAS timetable contains a bicycle carriage query and allows the research of transport solutions for customers with bicycles.

Unfortunately, the information concerning bicycle carriage is sometimes not accurate or even completely wrong. For example, the information about trains carrying bicycles on Trenitalia and GNER trains is completely missing (Stand October 2006).

According to HaCon, the information is provided by the operators to Deutsche Bahn and delivered from Deutsche Bahn to HaCon. The ECF has tried also in the past to get in touch with Deutsche Bahn and with Trenitalia to solve this problem, up to now without positive results.

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7.1.1. The point of view of customers

From customers' point of view, the current offer can be summarized as follows:

- **Poor transport offer in quantitative and qualitative terms** (*lack of connections offering bicycle carriage but also necessity to buy additional bicycle tickets during the travel as well as impossibility to reserve a bicycle space on the whole relation origin-destination*);
- **Complicated and unfriendly procedures for ticket and reservation purchase**
- **Difficult access to information**
- **International services as a weak point of the railway offer, also in countries where national services offer good standards.**

As a result in many cases customers are **not aware** of the possibility to carry their bicycle on long distance trains, **discouraged** from unclear rules and procedures, **afraid** of complications and failures in the service provision.

Potential customers are therefore increasingly looking at alternative forms of bicycle carriage (private car, bus trailers, ...)

7.1.2. The point of view of customers

Many RUs have admitted that they **never seriously investigated and analyzed the bicycle carriage market**. Other RUs stated that they developed bicycle carriage as a result of **spontaneous action of internal employees** or as **unorganised reaction to external lobbies and pressures**. In very few cases there is a specific know-how and planning.

Most companies see **bicycle carriage as a problem and not as an opportunity**. Main factors against bicycle carriage are:

Factors against bicycle carriage according to RUs	Some solutions adopted by other RUs
Costs of rolling stock adaptation	6604 Euro for 4 bicycle places on TGVs
Costs of capacity reduction	Not necessarily true for other RUs. Bicycle carriage has increased the loading factor and the number of sold tickets
Overcrowding and discomfort for other passengers	Not true for other RUs. Dislocation of bicycle spaces
Punctuality reduction due to loading/unloading of bicycles	Dislocation of few bicycle spaces on each train end. Platform announcements
Seasonality and consistence of the demand	Promotional and/or free bicycle carriage at offpeak times. Flexible rolling stock solutions
Cannibalisation of bicycle offer on regional services	Not true for other RUs. Better segmentation of the offer.

7.2. Bicycle carriage

The comprehensive evaluation of the European countries brings to two main needs:

- **Standardization of the offer**
- **Extension of the offer**

The following suggestions are mainly addressed to railway undertakings and to the organizations representing them.

However, a normative framework and support at European level would safeguard the passenger rights and facilitate a rapid implementation of the proposed measures.

***Rolling stock compatibility as a prerequisite ...
... for the creation of an attractive transport offer***

As a general rule, **bicycle carriage should be technically possible on all trains and allowed on all trains where the passenger loading factor make it reasonable** (outside peak hours - following the rules adopted in Netherlands).

At the same time, RUs should be incentivated to improve the sale system and to reduce the number of unsatisfied bicycle carriage requests

7.3. Ticket and Reservation Schemes

Each railway undertaking has the right to define its price and reservation schemes. However, it is common interest of the RUs to offer an integrated and attractive scheme.

The ECF proposal is to rapidly arrive to a mutual acceptation of an European Bicycle Ticket, valid on all European rail services allowing bicycle carriage. The proposed price is 10 Euro, reservation (if needed) included. Of course railway undertakings may continue to offer bilateral international tickets for cross border services at lower price.

Price differential among the European countries are not an issue: 10 Euro is a reasonable price for customers willing to carry its bicycle internationally.

European tickets like Interrail and Eurodomino should offer free or discounted bicycle carriage: negligible economic impact and relevant commercial and promotional value.

As general rule, **the reservation policy of bicycle spaces on long distance should follow the reservation policy of passenger seats: mandatory where also passenger reservation is mandatory, possible where also passenger reservation is possible.** Of course railway undertakings may incentive the reservation of bicycle spaces by offering it for free. On the other side, the experience shows that especially in case of delays passengers with bicycle should be able to board the following train even without purchasing a further reservation, if there are available spaces. Exactly as it works for passengers without bicycles.

7.4. Sales Channels

An European bicycle ticket would automatically solve the problem of the ticket availability in destination countries or on return travels. It will be possible to buy these tickets in advance and to validate them when needed.

This ticket, as well as national bicycle tickets, should be available at manned counters, automatic ticket machines and online. This should be easy reachable considered that bicycle tickets are independent from the travelled relations and could be easily standardized also at international level.

The possibility of bicycle space reservation on national and international routes should also be increased. **The European Union should support and require compatible database to allow the emission of international tickets and reservations.**

This is still a relevant problem also for customer without bicycle: how can the train compete with low cost aircarriers if it is not possible to rapidly check online the price of an international railway tickets?.

7.5. Website information

An international simplification and coordination of the bicycle carriage policies would indirectly make also their information and communication easier, both at stations and online. A reliable online information is today an essential tool to communicate the offered services. This should involve:

- ***Timetable search engine:*** should be available in the country language and in English, with "bicycle carriage" query. The HaFas timetable information system (see 6.3) is already used by many operators and could constitute the common basis. The reliability of delivered information should be improved and the price information (for passengers and for bicycles) should be enhanced
- ***Information about ticket and reservation schemes*** should be available in the country language and in English. Bicycle ticket and reservation should be available online.
- ***Railpassenger.info could be the basis of a common information platform***, if the information will be proved to be complete and reliable (see 6.1 also the confrontation with the UK National Rail Enquires guide). It should hence be integrated with timetable and price information, generated by a common European database.
- Website Information should also be a channel to communicate and promote ***special offers and schemes to further encourage the carriage of bicycles on long distance trains.***

7.6. An opportunity, not a problem

The comprehensive evaluation of the European countries brings to two main needs:

- **Integration of mobility chains:** only an integrated transport offer on the whole mobility chain origin-destination is able to be attractive and competitive
- **Exploitation of market niches:** necessity to fragment the transport demand and to capture niche markets with dedicated and flexible offers. Even if bicycle carriage on long distance trains is often not promoted and even discouraged, it is today - according to several railway undertakings - a niche market worth around 0,3 to 0,5 % of the total long distance market on annual basis and it is spontaneously increasing.
- **Bicycle carriage as a marketing tool:** as already mentioned, the sales volume of bicycle tickets has a low direct economical value, but it can allow relevant economical results thanks to the increased connected sale of additional passenger tickets. This fact give the opportunity to **utilize the bicycle ticket as a marketing and promotional tool to increase the loading factor.**
- **Price strategies:** empty bicycle spaces should be avoided at every costs, offering promotional or even free bicycle carriage at offpeak times. In the UK, where the railway undertakings are more exposed to the concurrence and therefore more sensitive to customer needs, most long distance railway undertakings are already offering free bicycle carriage on long distance trains. In Switzerland holders of some season tickets have free bicycle carriage in the evening.
- **Special offers:** unexplored is up to know the creation of "bike interrail" and "bike eurodomino" tickets. Targeted offers with bicycle carriage can be proposed in cooperation with local authorities and tourism boards on special relations and periods.

Thank You!