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HIGHSPEED

Morocco 2023

HIGH-SPEED RAIL : THE RIGHT SPEED FOR OUR PLANET

Under the High Patronage of his Majesty King Mohammed VI

Session4.4 Room Karam4 Commercial / Tourism



Moderator : Ms. Inmaculada Gutiérrez CARRIZO,
Renfe, Spain



Session4.4 Commercial / Tourism Speaker Lists;

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Mr.Mario
Tartaglia

Italy

2



Mr.David
Martin

Spain

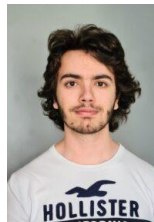
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Mr.Carles Casas
Esplugas

Spain

4



Mr.Lucas
Rabehi

France

5



Dr.Hulusi
Aydemir

Turkey



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11TH WORLD CONGRESS OF HIGH-SPEED RAIL

Marrakech, 7-10 MARCH 2023

Strategic Responses to COVID 19 by railway companies operating high speed services to touristic destinations in major European markets

Mario Tartaglia

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Session4-4.4 Commercial / Tourism





Strategic Responses to COVID 19 by railway companies operating high speed services to touristic destinations in major European markets

Context:

The COVID-19 pandemic has had a devastating impact on numerous industries across the world. One of the worst affected has been the high-speed services in Europe, which experienced dramatic drops in demand due to travel restrictions. High Speed Rail Services to touristic destinations outside functional urban areas. at EU level have suffered the most out of all HSR services, due to long periods of lockdowns and to retrenchment and exit strategies implemented by most of HSR operators. A FUA is composed of a 'city' and its surrounding, less densely populated local units that are part of the city's labour market, therefore in the paper are considered touristic destinations with less than 250.000 inhabitants.

Research questions:

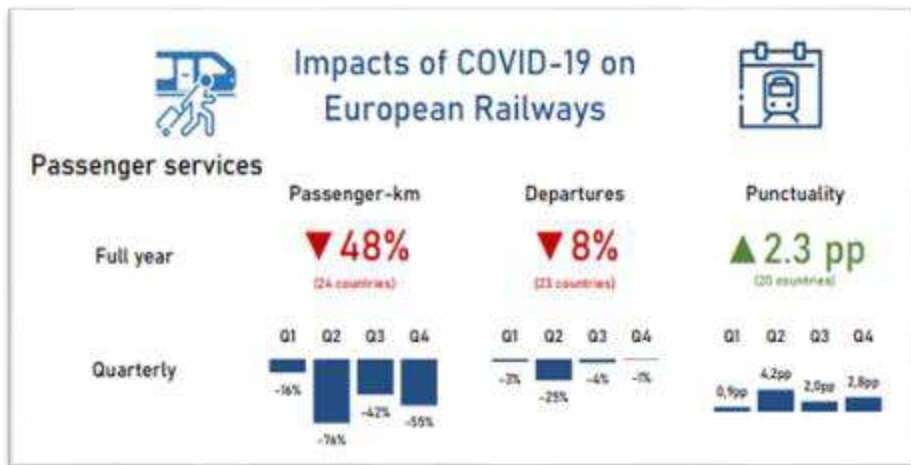
- 1) What are the overall patterns of strategies adopted by HS railway companies serving touristic destinations in Europe over time?
- 2) What are the main types of measures introduced within different categories of strategies?

Objective and methodology:

This paper aims to explore how these operators responded to pandemic, by analyzing the strategies implemented between March 2020 and end of September 2022 in the touristic destinations outside functional urban areas at Eu level.

The paper considers EU countries with HSR services and involves the categorization of these new items to six main strategies:

- 1) Retrenchment,
- 2) Persevering
- 3) Exit
- 4) Innovating
- 5) Relaunch
- 6) New brand



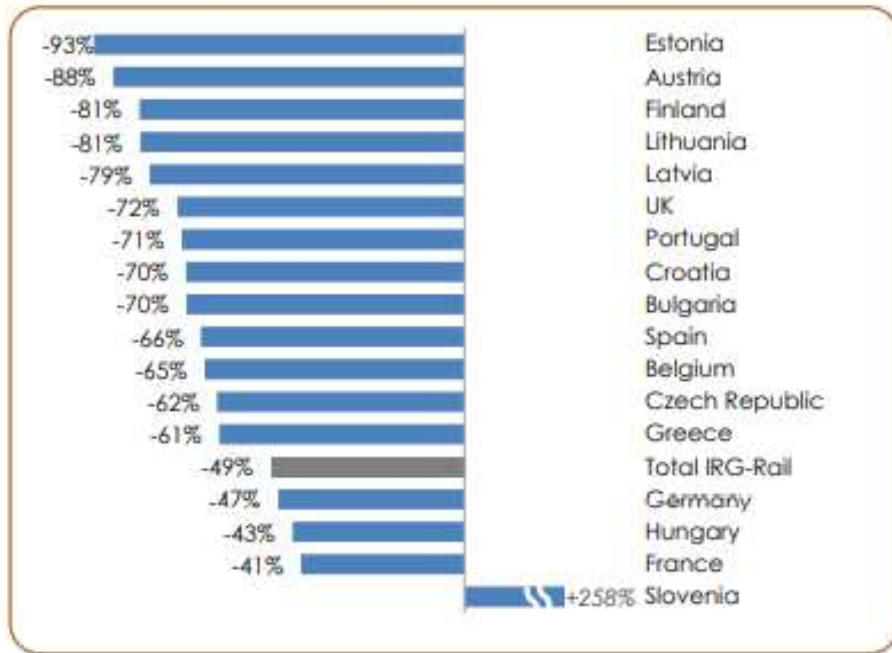


Retrenchment strategies

- Retrenchment strategies were adopted heavily at the onset of the pandemic
- Adoption decreases rapidly throughout 2020
- Peaks in adoption of retrenchment measures correspond to COVID-19 cases waves, particularly between March and July 2020, and between April and December 2021

Most articles refer to railway companies' decision to reduce capacity (e.g. adjusting service schedules, cancel services) or decision to award operators with temporary PSO (like in Austria, where the government decided to award both open access operators between Vienna and Salzburg - WESTbahn and ÖBB - with a temporary PSO order for the route) or reduction by law of the seats available for sale.

Figure 7 – Change in non-PSO passenger-km, comparison 2020/2019





Persevering strategies

The most powerful persevering measure was government assistance

In order limit the impact of the pandemic on the railway sector, some financial measures were adopted in 2020 by the states or infrastructure managers, such as:

- 1) adjustment of track access charges (Thanks also to EU regulation 2020/0127/COD;
- 2) state aids to railway undertakings;
- 3) state aids to the infrastructure managers.

Persevering strategies – financial measures adopted by states or infrastructure managers by category

NB there is still no uniform European strategy that supports all rail passenger rail companies fairly and equally - both operators and ticket vendors - both privately and publicly owned.

	Adjustment of Track Access Charges (TAC) and cancellation/reservation charges				State aids to the railway undertakings or infrastructure managers					
	Changes of the level of TAC	Postponing of the invoicing	Changes of the reference for TAC	Relaxation of cancellation charges / reservation penalties	Fundings of TAC	Compensation for the loss of revenue for the infrastructure manager	Compensations for the loss of revenue for the railway undertakings	Temporary PSO contract	Loan facilities, credit guarantees, or postponing of public charges or debts (or "tax vacation")	Temporary unemployment aid and short-term work
Austria				x	x	x		x		x
Belgium				x					x	x
Bulgaria										
Croatia				x			x		x	
Czech Republic										
Estonia			x				x			
Finland							x		x	
France					x		x			x
Germany				x	x	x	x		x	x
Greece							x			
Hungary						x	x			
Ireland										
Italy	x	x		x		x	x		x	x
Latvia									x	
Lithuania									x	
Netherlands							x			
Norway		x		x				x	x	x
Poland				x			x		x	
Portugal				x						
Romania						x	x		x	x
Serbia										
Slovakia	x									
Slovenia				x						x
Spain			x	x					x	
Sweden		x					x		x	x
UK							x			x



This overview of global impacts and measures taken by States / Regulatory bodies / Infrastructure managers is based on free text-field answers collected by IRG-Rail at the end of 2020 and the beginning of 2021 focusing on indicators which highlight the impact of the pandemic during 2020. This section aims to show a collection of factors cited by countries but does not represent an exhaustive overview of impacts and measures observed for every country in the panel.

The complete answers to these qualitative questions can be found in the dataset published with the report.



Exit strategies

- Exit strategies were mainly referred to in articles during the first year of the pandemic
- Despite catastrophic impact of the crisis, no railway companies exits
- The crisis presented an opportunity for railway companies to reconsider their portfolios to focus on core strengths and eliminate operations which were already performing poorly before the pandemic

NB in many countries non-PSO services are international trains which have to cross borders and therefore were the first to be stopped when countries announced their lockdown measures.

Innovating strategies

- Adoption of innovating strategies increased rapidly throughout 2020
- Dip in adoption between June and September 2021 is consistent with larger use of retrenchment strategies
- Increased focus on domestic market appeared the most in the articles included in the analysis

Most articles refer to railway companies' decision to offer new experience (e.g. offering free trips for local heroes) and new pricing schemes (launches flexible fares), with new train+bus combination (e.g. FrecciaLink) or new seasonal domestic destination (e.g. Cilento in Southern Italy)





Relaunch strategies

- Articles related to relaunching operations are mainly from the second year of the pandemic
- Majority of articles refer to railway companies re-starting international seasonal operations
- Relaunch strategies tended to follow government announcements regarding the opening of borders or the introduction of travel bubbles
- One group underwent restructuring processes (In March 2022, the alliance of Thalys and the international high-speed rail service Eurostar - the Green Speed project - was approved by the European Commission. This alliance has resulted in the creation of a holding company that owns 100% of the shares of Eurostar and Thalys. This holding company is owned by SNCF (55.75%), CDPQ (19.31%), SNCB (18.5%) and funds managed by Federated Hermes Infrastructure (6.44%).

New railways company

- Trenitalia France – serving Milano – Torino- Modane- Chambery – Lyon - Paris
- OUIGO España – serving Madrid and Valencia, Alicante, Cordova, Seville and Malaga



Conclusions

- Understanding the measures adopted by different players in the industry can serve as a benchmark for railways managers to compare own responses with those of competitors
- The analysis regarding the timing of different responses can allow managers to identify at which point of the crisis it is more appropriate to introduce different strategies
- The categorisation can serve as a reference for managers to consider multiple options and specific strategies to implement, according to the six macro categories



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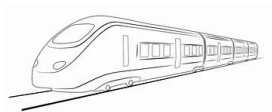
Renfe and Tourism

A sustainable and enjoyable way to travel

David Martin
Manager New Products and Tourism
Renfe, Spain
Session4-4.4 Commercial / Tourism



Tips about High Speed in Spain



- Largest HS network in Europe **4.000 kms**
- 3 gauges (UIC & Iberian & Metric)
- Rolling Stock Alstom, CAF, Siemens, Talgo, Bombardier
- Renfe brands: AVE, Avant, Alvia, AVLO + Regionals
- Multimodality High Speed & Commuter trains on one ticket
- + 45 cities connected by HS

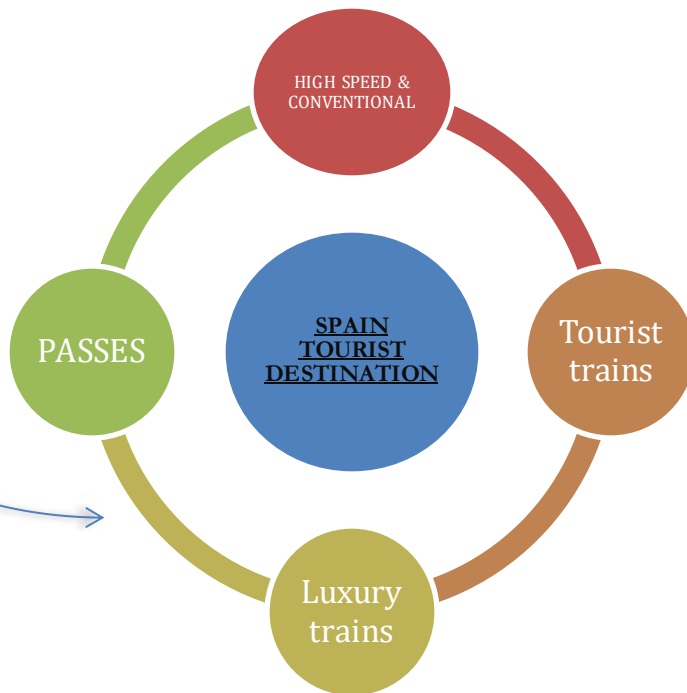
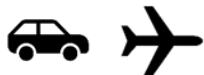




Renfe Touristic Products



72 Millions Tourists
(2022)



- Boost local economy
- “Green ways”
- Day or Themed Trains



Tourism & Renfe



A unique experience
Luxury Trains

Themed or **Day Trains** to
promote local tourism

→ 2022: 60 depart. (90% occup.)
2023: + 90 departures agreed



To Travel Freely

Aimed at foreigners to travel
(4 to 10 journeys in 1 month)



Around Europe & Spain

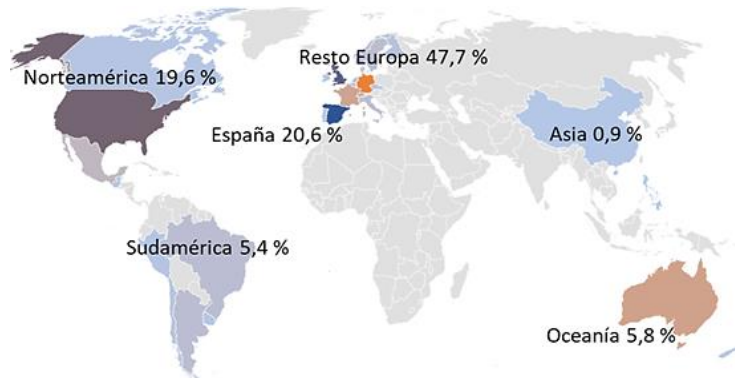




Luxury Trains in Spain



- ✓ 2023 sales trend show a growing interest in Luxury Trains (by January 50% season sold)
 - ✓ Trips based on 7-days experiences all-inclusive.
 - ✓ Nothing is easy: Train operation & maintenance are complex and highly specialized.
 - ✓ **Key to success**: High level of performance and professionalism of onboard staff (stewards, chefs, guide and train manager).
 - ✓ **A unique experience**: Customers travel/sleeps on the train. During the day visits with local guides. Breakfast and dinner are on the train. Lunch in finest cuisine and Michelin-stars restaurants.
-
- 2022 season: 61 departures. **All trains were fully booked**
 - In a **high inflation scenario** (energy, gastronomy, staff, ...) we have been pushed to extend trip period attracting more customers to ensure profitability.
 - 96 departures (+57%) are scheduled in 2023 (+Charters)



All cabins equipped with private bathroom/shower, kitchen, restaurants and lounge coaches



Soon destinations such as Lisbon, Porto or Barcelona will be added to the programs.





Main Goal is to promote sustainable tourism in small groups to do sightseeing (PPPs)

Operation started 13 years ago every year new routes and regions added.

Main features:

- ✓ They are based on one-day trips (Saturdays in spring, summer & autumn)
- ✓ Themed Trains include bus approaches with tourism, gastronomy, cultural heritage, wine and food tasting, tour by boat, ...
- ✓ Free ticket in local trains to arrive (and return) at the departure station.

Groups from 55-110 people (sometimes up to 200) accompanied by local guides

How the product is designed ?

Formally by signing an agreement between public and privates entities and Renfe.

Two main tasks:

- ✓ In-house such as scheduling, timetables, ensuring rolling stock and staff
- ✓ External: Bus/Boat rentals, agreement with vineyards, museums, ... hiring local guides



Main Goal is to promote sustainable tourism in small groups

Operation started 13 years signing an agreement with public and private (PPPs) Entities. Every year new routes and regions join the program.

Main features:

- ✓ They are based on one-day trip (Saturdays in spring, summer & autumn)
- ✓ bus approaches or tour by boat to get to places with no train tracks to enjoy wine and food tasting
- ✓ Free ticket in local trains to arrive (and return) at the departure station.


Groups from 55-110 people (sometimes up to 200) accompanied by local guides

Two main tasks:

- In-house such as scheduling, timetables, ensuring rolling stock and staff
- External: Bus/Boat rentals, agreement with vineyards, museums, hiring local guides, ...





- **Expreso de la Robla** (metric gauge night train 3 days journey) 
- Walking the **Pilgrim's Route** (Camino de Santiago) sleeper train cabins. 6 days
- **Green Ways** are old railway lines reconditioned for use by walkers and cyclists (+2.900kms of routes)

Projects under development:

- ✓ **LUNAE** or Night Train Tour to visit Barcelona – Madrid – Galicia – Portugal...
- ✓ **High Speed Tourist Tours** to visit Barcelona – Madrid – Seville – Valencia (Train & Hotel)
- ✓ **Green Spain** in cooperation with regions to Digital Tech for Tourism (Next Generation Funds)
- ✓ New routes for **AL ANDALUS** (Cataluña – Galicia – Portugal)
- ✓ “**AUN+ CERCA**” (High Speed + Commuter Pass)
- ✓ New platform to sale

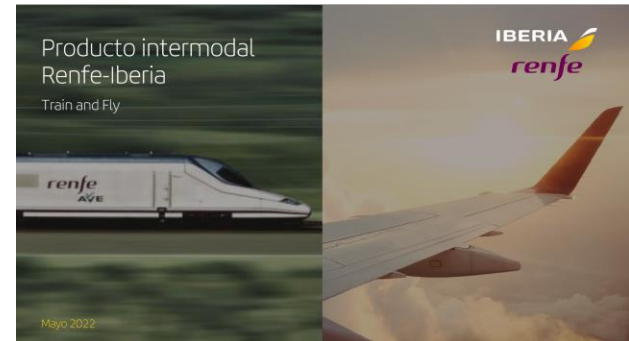


- ✓ In the face of the massive tourism of cruises, Renfe offers more sustainable trips in small groups.



- ✓ To Keep tourism actions over time by involving PPPs to boost local economy, while traveling in an **environmental and friendly means of transport**.
- ✓ Sightseeing to less known places to extend the benefits of tourism beyond season

- ✓ Renfe and Iberia share an intermodal product for international air passengers to travel in Spain by train (Train&Fly)





Conclusions

- ✓ Tourism by train was a great unknown, so there is still a long way to go.
- ✓ Improving communication and distribution of tourism products
- ✓ Trains are the best partner for seamless connections to international flights
- ✓ More than ever, railways must be the **backbone of mobility** helping to reduce carbon footprint.



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Thanks for your kind attention



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Fostering Rail Tourism: insights for high-speed services

Dr. Carles Casas Esplugas

Director, Strategic Planning & Prospective, Ferrocarrils de la Generalitat de Catalunya, Spain

Chairman, Toprail – UIC

Vanessa Pérez Miranda (UIC)

Ana García Pando, consultant (AGP)

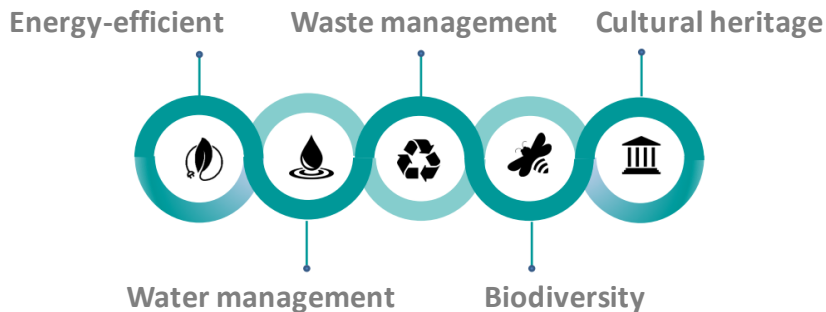
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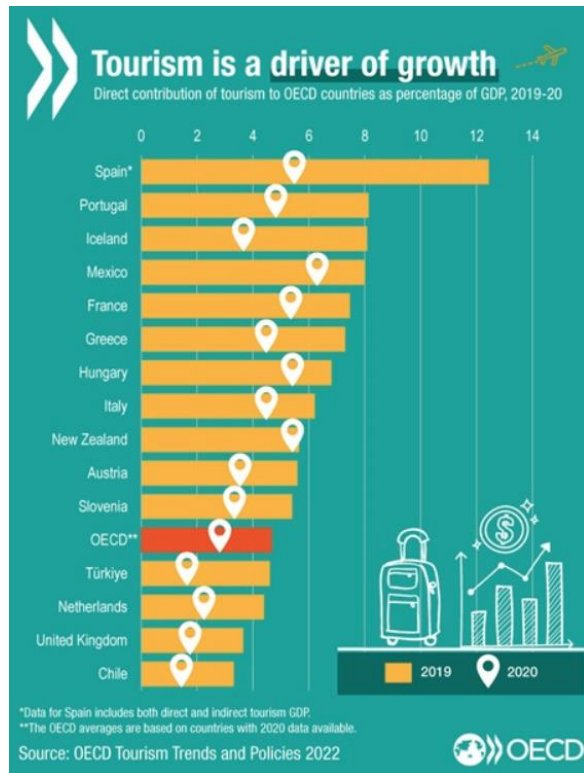


Tourism trends

- Tourism has been increasing in the last years, and it is a **driver of economic growth**; it accounted for 6.1% of the global GDP in 2021.
- In this context, it is necessary to **promote a competitive, sustainable and inclusive tourism** industry.



Mobility and tourism can be considered as inseparable concepts, and **tourist railways have much to contribute** to sustainable development, decentralization, diversification and management of tourist flows.





Rail & tourism

Tourist railways allow the creation of added value at economic, and social level through optimization of existing resources:

- ❖ **Sustainable tourism:** well-designed and well-managed railway tourism products are related to the three pillars of sustainable development (social, environmental, economic).
- ❖ **Regional development:** railways have a relevant impact on tourist destination choices regarding accessibility.
- ❖ **Heritage protection:** railway tourist projects enable an increased knowledge of nature and railway & industry heritage.

How Rail tourism can contribute to sustainability

- Better use of existing infrastructure: visitors and local community
- Product diversification and scalability
- Innovation and integration with other product
- Enable an experience which would otherwise be impractical
- Manage environmental impact: energy, route, on-board practice
- Increased focus on nature of journey rather than destination

However, tourist railways tend to be isolated products with few interconnections, and barely 2% of all international tourist journeys use railways as a mode of transport. To develop its full potential, **the railway must consider making their services more attractive**



TopRail: goals and scope



TopRail is a UIC initiative that actively promotes railway tourism products by **increasing the visibility of service offerings**. This is accomplished by providing a platform enabling close **collaboration between stakeholders** and their customers to encourage railway tourism opportunities.

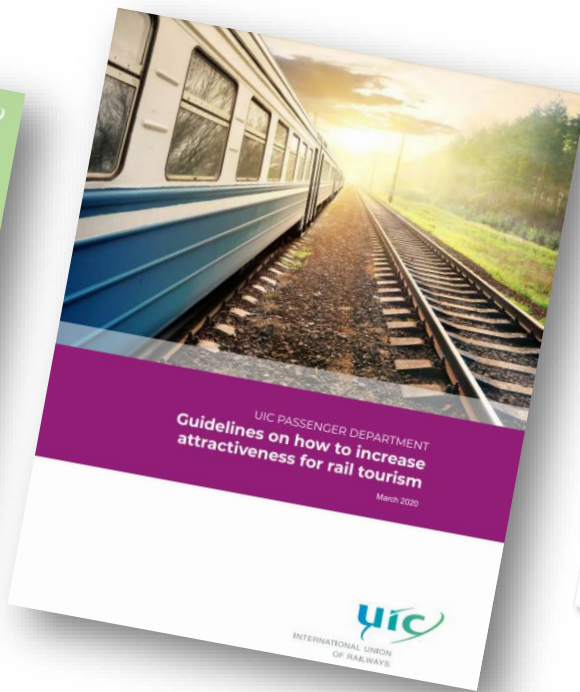
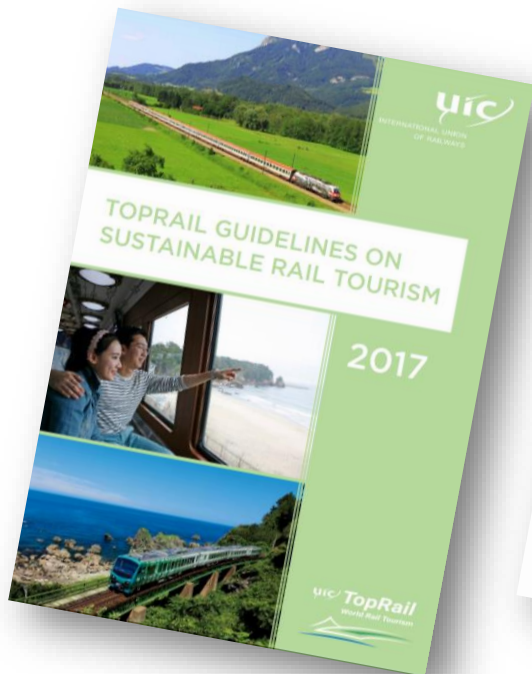
Tourism by railway is heterogeneous and attractive for all types of customers (youth, adults, active, retired, families, railway enthusiasts, people who discover railways, domestic and international tourists) and there are many opportunities to develop and enjoy leisure by rail, such as:

- ❖ Trains as tourism products
- ❖ Trains running in scenic areas
- ❖ Trains providing mobility at a tourist destination connected to the mainline lines
- ❖ Heritage railways





TopRail: developed studies





Guidelines on how to increase attractiveness for rail tourism

It is the purpose of these guidelines to **help railway operators to better understand the key elements and actions that can help rail companies increase numbers of passengers** and income through tourism. The guidelines contemplate the following aspects:

- ❖ **Tourist trends and how to match rail tourist products**
- ❖ **Attributes for creating attractive rail tourist products**
- ❖ **Strategies for increasing flows towards rail tourism products according to tourist patterns**
- ❖ **Strategies for creating specifically rail oriented tourist products**

Attributes for assessing attractiveness of rail products for tourists		
Tourist appeal	Existing tourist attractions	Number and typology of main tourist destinations served, attractiveness of the line (scenic), attractiveness of rolling stock, etc.
	Tourist-oriented amenities	Tourist lounge area and entertainments on stations, free Wi-Fi in stations/trains, more leg-room, electric sockets for charging appliances, premium class, themed cars, etc.
	Tourist activities	Escorted tours/visits to attractions close to stations, typical food in stations, tourist activities around and reached by train, etc.
Access	Accessibility	Intermodality with other modes, convenient access to stations by PT, punctuality, enough frequencies, adapted schedules to tourist behaviours, etc.
	Awareness of convenience	Tourist info on panels and screens in languages, tourist info on ticketing, friendly itineraries highlighted on website, guides, and general info, active marketing campaigns, presence in media, etc.
	Availability	Longer term booking horizons, convenient online booking system, convenient changes and cancellation policies, ticketing integration, etc.



Markets & Trends... opportunities for HSRail

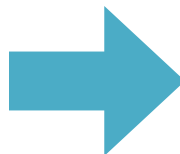
Two types of demands need to be considered:

- General Rail Tourism Demand (GRT)
- Specifically, rail-oriented tourism demand (SROT)



Some of the identified trend in tourism and rail opportunities:

- Rise of “experiential travel” and renewed interest in wellness, distant from hyper-connected, fast-paced lives
- Social and shared leisure
- New technologies
- Rise of young, urban populations and increase of middle class
- More ethical and resource-efficient lifestyles, conscious consumption



Is HS rail better positioned than other modes in order to capture market and take advantage of this opportunities?



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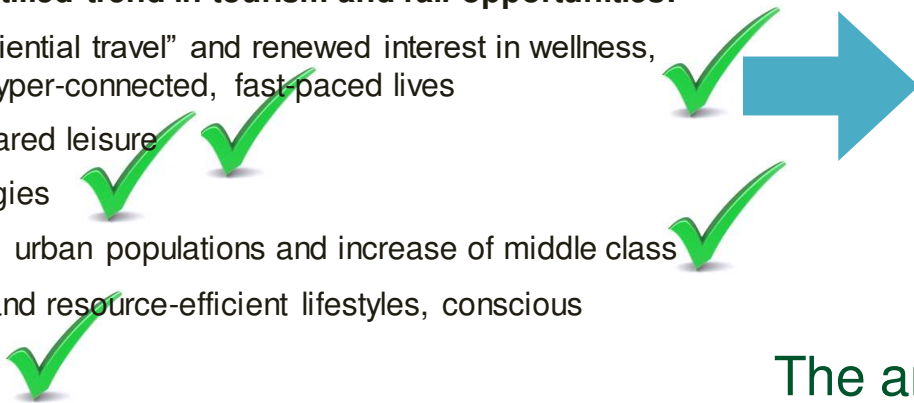
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Is HS rail better positioned than other modes in order to capture market and take advantage of this opportunities?

The answer is **YES!**

But work needs to be done both within and beyond the industry!



HS Rail will no longer be attractive “by itself”



but it still catches the eye!



HSRail has the potential to be a Tourist Game Changer

Both the academy (research), the tourist industry and the customers agree on this potential!

But the rail sector is not always able to overcome the hurdles that restrict market development.

Possible obstacles to success in market development

- Mismatch of process or product with booking patterns or demand
- Lack of progress in rail Technical Specifications for Interoperability
- Operational difficulty for trade buyers and resellers
- Insufficient scope for commercial margin and packaging
- Risk of missed connections and poor intermodal connections
- Risk to production given lack of comparable alternative(s)

ETOA

HIGH-SPEED RAIL SYSTEMS AND TOURISTS' DESTINATION CHOICE: THE CASE STUDIES OF PARIS AND MADRID

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³Centre of Transport Investigation (TRANSYT) - University of Madrid, Spain.

ABSTRACT

The analysis of how tourists select their holiday destinations along with the factors determining their choices is very important for promoting tourism. In particular, transportation is supposed to have a great influence on the tourists' decisions. The aim of this paper is to investigate the role of High-Speed Rail (HSR) systems with respect to a destination choice. Two key tourist destinations in Europe namely Paris, and Madrid, have been chosen to identify the factors influencing this choice. On the basis of two surveys to obtain information from tourists, it has been found that the presence of architectural sites, its and social events have an impact while make a choice of Paris and Madrid as tourist destinations in a mode alternative among tourists. On the other hand, an efficient HSR network. Data collected from the two Regression models have been specified and parametric holidaymakers to revisit Paris and Madrid and visit it.

Keywords: High-speed rail, Madrid, Paris, tourism.

DEMANDA Y VELOCIDAD

¿Puede la alta velocidad fomentar el turismo?

La experiencia del caso español

Can High Speed Rail enhance tourism?

The spanish experiences

Juan Luis de la Campa Cascabel

RESUMEN

España es uno de los países con más afluencia de turistas, ocupando el tercer lugar mundial por su red más larga de Alta Velocidad ferroviaria. El impacto de la A-V. en nuestro país sobre el

El tren de Alta Velocidad como factor dinamizador del turismo en el ámbito cultural de los museos. Análisis en tres comunidades autónomas españolas.



Juan Luis de la Campa Cascabel
Ingeniero de Caminos, Canales y Puertos



Rosa María Arce Ruiz
Doctora Ingeniera de Caminos, Canales y Puertos



María Eugenia López Lumbas
Doctora en Derecho

Resumen

España es una potencia turística a nivel mundial, que se ha debido de la mayor red europea de Alta Velocidad. Como esta puede servir como catalizador de desarrollo del sector turístico ha sido hasta la fecha poco estudiado y con resultados contradictorios. Este artículo, analizando la afluencia de visitantes a los museos de tres comunidades españolas, pone de manifiesto que en determinados destinos, el tren de Alta Velocidad sí que puede ser un factor potenciador de este sector económico tan importante para la economía española.

Palabras clave

Alta-velocidad ferroviaria, turismo, planificación de las infraestructuras de transporte, evaluación socio-económica, análisis de datos panel.

Abstract

Spain is a major world tourist destination and one provided with the largest High-Speed Rail network in Europe. While this network could serve as leverage for even further development in the tourist sector, it has received relatively little study to date and with varying results. On analysing the numbers of visitors to museums in three Spanish regions, this article considers that in certain destinations, the high-speed train could be an enabling factor for this economic sector that is so vital to the Spanish economy.

Keywords

High-speed rail, tourism, planning of transport infrastructure, socio-economic evaluation, panel data analysis.



Conclusions

- ❖ There is a **huge opportunity** in tourism for further development of HS Rail
- ❖ Current trends in both domestic and international tourism are **aligned with the product that HS Rail is able to deliver**.
 - ❖ **But speed, just by itself, its not enough.**
- ❖ HS Rail has the **capacity to be a game changer for some touristic markets** which were out of the circuit on the classical tourism provision.
- ❖ HS Rail is also able to create **synergies with the whole rail & public transport system** thus contributing to a more **sustainable tourism**.
 - ❖ The example of Japan, linked to international visitors is exceptional in this sense.
- ❖ But **HS Rail needs to evolve and adapt to Tourism needs** both from the technical and commercial point of view:
 - ❖ Real **interoperability** among systems and easier access to networks in order to generate an **attractive offer**.
 - ❖ Adaptation to the **commercial circuits** of travel agencies (for instance in terms of calendar and flexibility)



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ENGINEERING A HIGH-SPEED NIGHT TRAIN

Lucas Rabehi
Engineering Student, ESTACA, France
Session 1 – 2.1 Rolling stock / Design





AIM OF THE PROJECT

Cutting down the number of connections needed

Allowing for longer distance trips

More attractive to business travelers



More convenient, more durable





AIM OF THE PROJECT

Key innovations



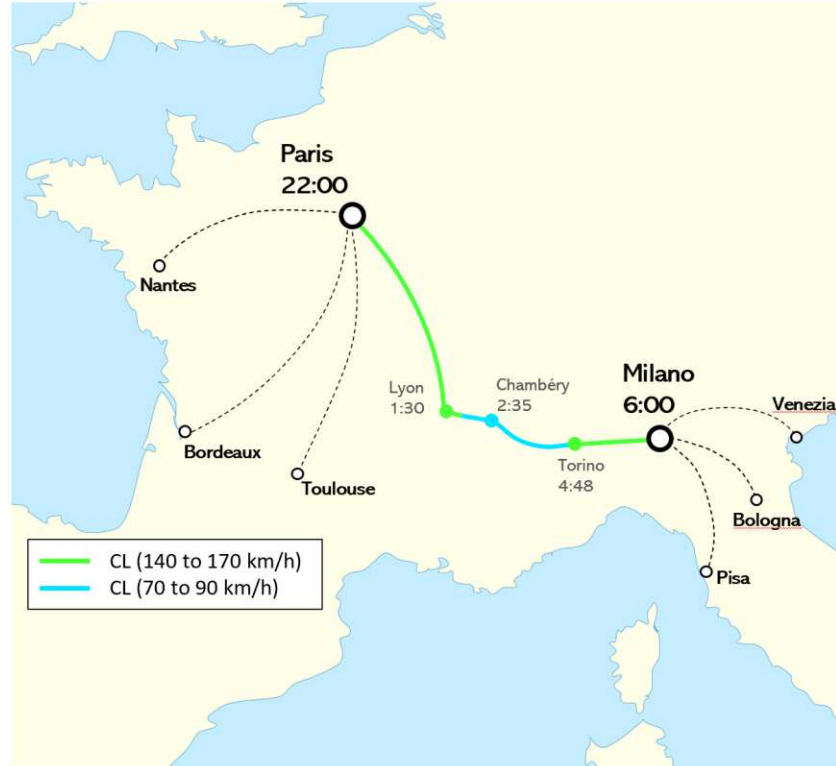
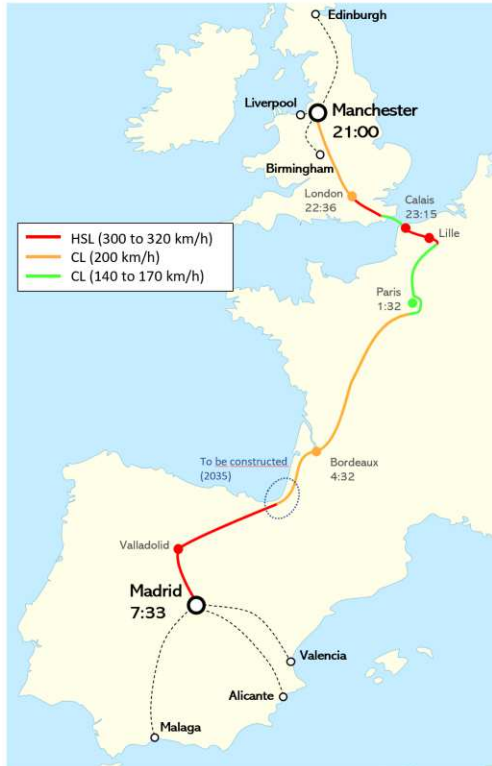
❖ Divisible triple unit



❖ Airline-type reclining seats



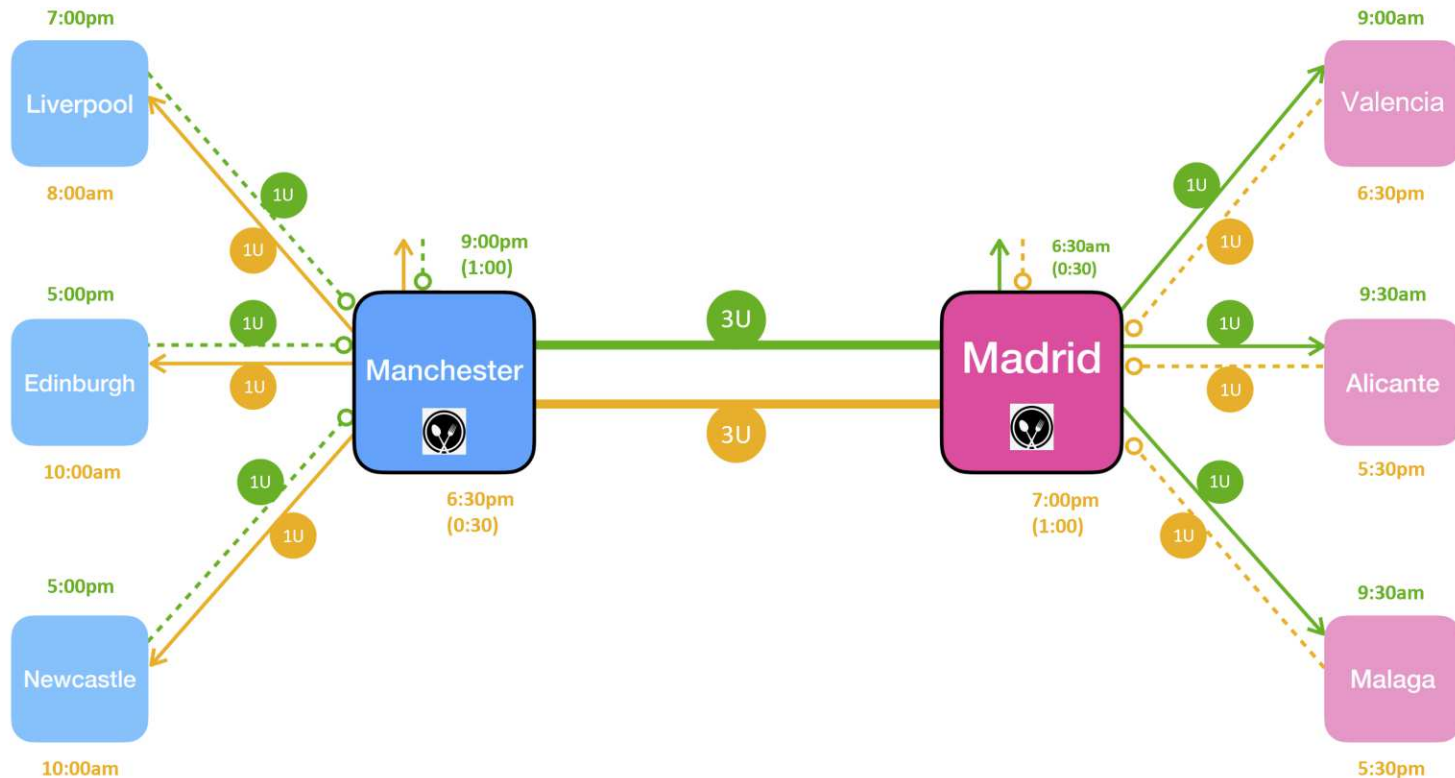
I – Identifying the requirements



- ❖ Able to use high-speed lines
- ❖ Space for many signaling systems
- ❖ Single level only
- ❖ Able to climb steep inclines in difficult conditions

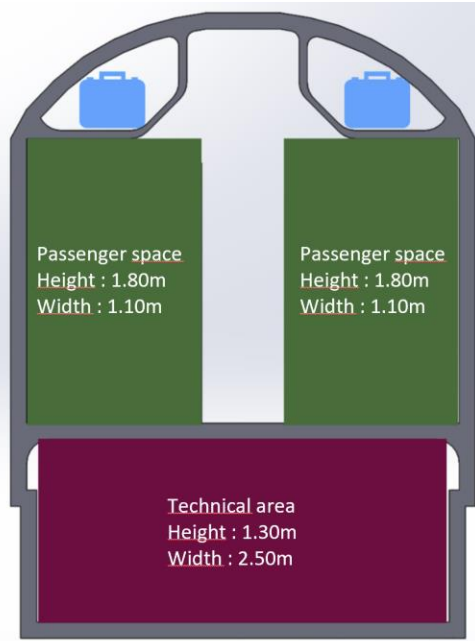


I – Identifying the requirements

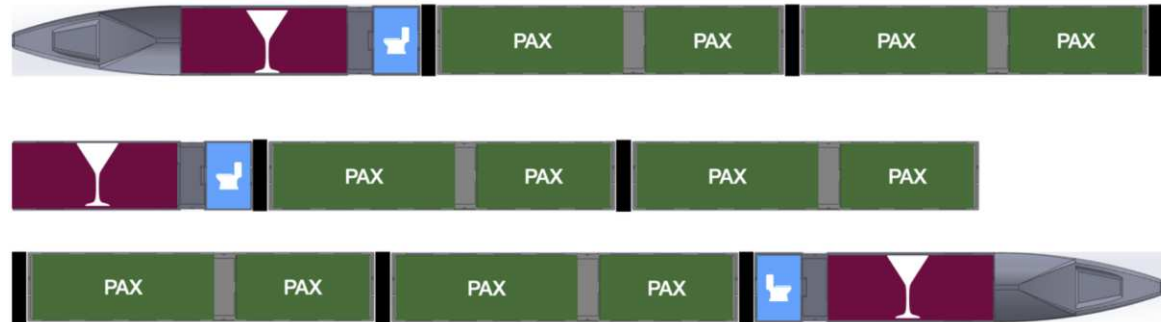




II – Interior architecture

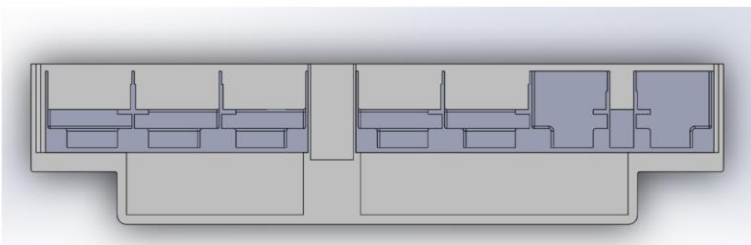
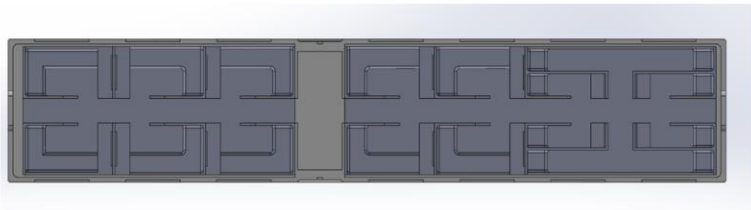


- ❖ 135m for a single unit
- ❖ 15m passenger coaches
- ❖ 10m bar coaches
- ❖ Space for traction and signalling equipment





II – Interior architecture

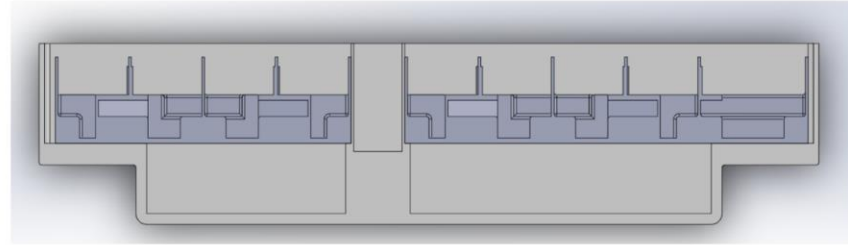
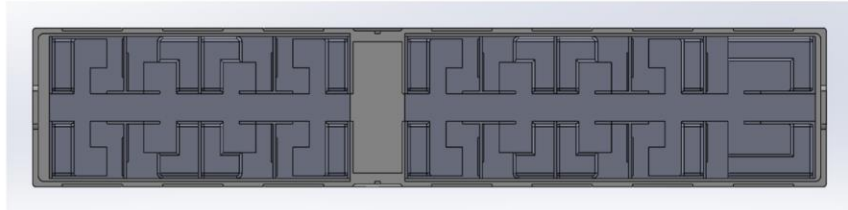


Second class

❖ 8 individual seats

❖ 10 double seats

❖ 28 pax per coach



First class

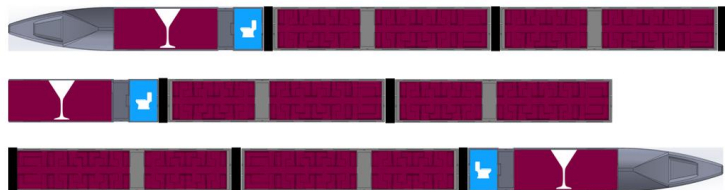
❖ 16 individual seats

❖ 1 double seats

❖ 20 pax per coach

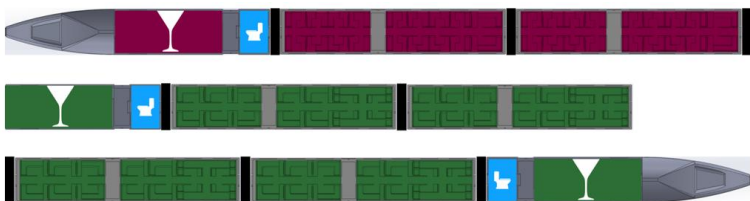


II – Interior architecture



Premium configuration

- ❖ 120 pax per unit
- ❖ 360 pax total



Mixed configuration

- ❖ 152 pax per unit
- ❖ 456 pax total



High-capacity configuration

- ❖ 168 pax per unit
- ❖ 504 pax total



III – Dimensioning the traction

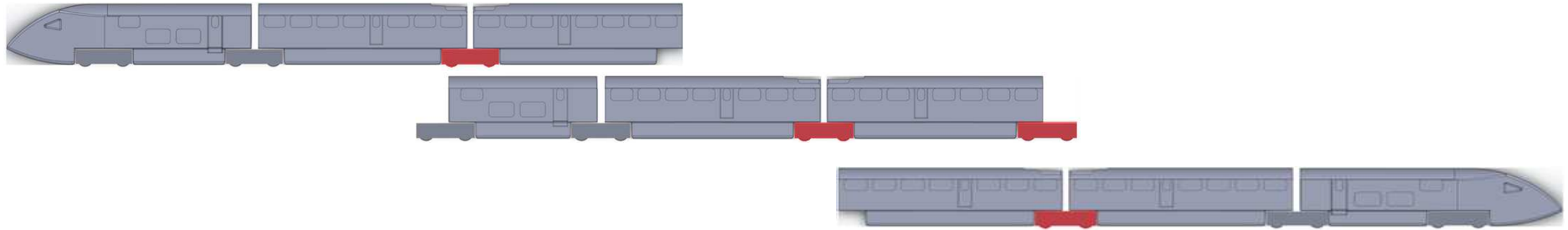
Requirements

- ❖ 280t mass per unit (without traction equipment)
- ❖ 17.5t/axle (HSL)
- ❖ 18 MW maximum under 25 kV
- ❖ 320 km/h on flat ground
- ❖ 160 km/h in a 35‰ incline



Specifications

- ❖ **8 motorised axles** (33% motorisation rate)
- ❖ Asynchronous permanent magnet motors from Alstom's AGV (**760 kW/motor**)
- ❖ **6080 kW per unit** under 25kV
- ❖ Maximum mass per unit with equipement : 340t





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HIGH-SPEED RAIL : THE RIGHT SPEED FOR OUR PLANET

Under the High Patronage of his Majesty King Mohammed VI

THANK YOU

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11TH WORLD CONGRESS OF HIGH-SPEED RAIL

Marrakech, 7-10 MARCH 2023

PROVINCE SELECTION FOR HIGH SPEED RAIL IN TÜRKİYE

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