

Market assessment international train services in open access regime in NL (from 2025)

The Netherlands aims to further improve the international train services to and from the Netherlands so train passengers can travel to and from the Netherlands in an affordable, convenient and comfortable way. As of 2025 there is more room for competition on the market of international train services. The Ministry of Infrastructure and Water Management has commissioned the consortium Berenschot, Arcadis and TÜV Rheinland to conduct a market assessment. The purpose of the market assessment is to determine the likelihood that international train services will be offered in an open access regime from 2025. National and international train operating companies are invited to express their ambitions (or conditions) to start offering international train services in open access to and from the Netherlands from 2025.

In the market assessment, three aspects are mapped out from the perspective of the train operating company. The first aspect is the attractiveness of the market and the strategic considerations of train operating companies whether to offer international train services. The second aspect is the feasibility. To what extent are train operating companies able to actually realize an international train service from a logistics-operational perspective? And which train services are offered? The third aspect concerns the affordability. For each international connection the financial aspects will be worked out on the basis of a business case (at a general level). The consortium will conclude the market assessment in June 2021.

Berenschot, Arcadis and TÜV Rheinland invite train operating companies to express their vision with regard to the opportunities to offer international connections in an open access regime from 2025. This concerns long distance and short cross-border distances, as well as open access services on current international train connections and potentially new connections and night trains to be introduced. The consortium would also like to know what challenges and obstacles train operating companies see in realizing international train services in an open access regime.

Train operating companies (and other interested parties) are cordially invited to contact the consortium before March 9th 2021 by sending an email to mrs. Vera Mulder (v.mulder@berenschot.nl). For further information, please contact project manager mr. Kaj Mook (+31 647272147).

This message is not part of a market consultation (Directive 2014/24/EC, article 40) with a view to preparing the procurement and informing economic operators of procurement plans and requirements of the ministry of Infrastructure and Water Management.