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MEDIUM-TERM FORUM DEVELOPMENT STRATEGY

**Deliverable D40
WP C.2**

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1 Introduction and guide to the document

EU activities in the area of passenger intermodality in long distance passenger travel started with the study '[Towards Passenger Intermodality in the EU](#)' (EUPI) in 2004 in which a kind of action plan for was elaborated. The LINK project (a "child" of EUPI) has continued with the set-up of an expert forum and preparation of concrete recommendations to enhance passenger intermodality and now is the time to take practical steps to ensure continuation of the work of LINK and help turn the recommendations into reality. This strategy document examines and proposes how we plan to go about this.

1.1 Guide to reading this strategy document

Chapter 1 - Introduction gives an overview of where LINK came from, what LINK has achieved, where it is now and which are the objectives of this strategy document.

Chapter 2 - Analysis contains a comprehensive analysis of options for a continuation including views of the LINK stakeholders and partners, the LINK policy advisory board and an overview of external funding sources. This chapter is intended to give a deep understanding of the options as well as the rationale and basis for the following vision and road map.

Chapter 3 - Vision gives a 2 page concise view on where we want LINK and its agenda to head and how this can be achieved. ***For the reader with little time, demanding a summary, this is the key chapter to read.***

Chapter 4 - Road Map gives a detailed view on what steps can/should be taken by whom, using what funding sources in order to move towards the LINK vision. This is essential reading for any readers who would like to get involved in developing the LINK vision

1.2 Where LINK is at end of project

The LINK project, funded by the European Commission (DG MOVE, formerly TREN), which finished in March 2010, has created a European Forum on Intermodal Passenger Travel. The specific LINK focus has been on long distance and cross-border travelling. The project has generated a network of stakeholders and experts, a best-practice database, a research Virtual library and the series of practical recommendations on how to further long distance passenger intermodality.

LINK has created a large community of stakeholders (through consultation processes, dissemination of information and best practice, participation in working groups etc.). Currently the contact database includes around 1300 entries.

LINK, however, is currently a project managed by a group of research organisations, networks and consultants with a high level of external stakeholder awareness. It is not yet a forum in the more precise sense of a formalised stakeholder membership with its own organisation and financing model.

The LINK working groups (further shortened to WG's) have provided a unique opportunity to bring together more than 100 intermodality experts with different scientific disciplines and institutional backgrounds such as public authorities, operators, operators groups, user groups, academia, politics, business and industry. The WG's also provided a forum for stakeholders (mainly at the expert level) to exchange and network.

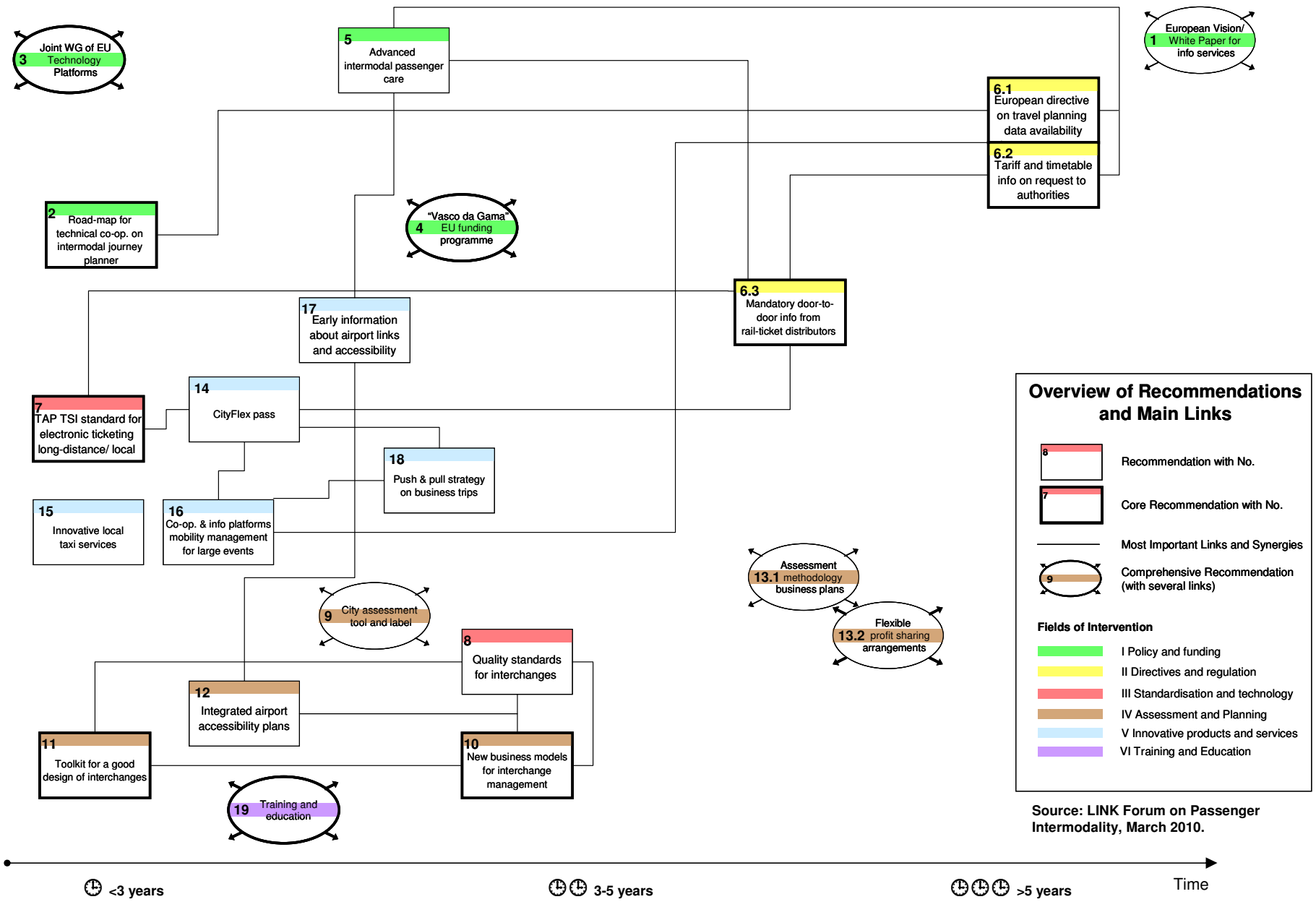
The participants overall have provided very positive feedback on the activities in the WG's and LINK Conferences. This shows that there is a desire for opportunities for discussion and the development of solutions to foster passenger intermodality in Europe.

The 19 key LINK recommendations¹ generated by the WG's (with many other ideas generated in the working groups) have been detailed by the WG leaders in close co-operation with external experts. These LINK recommendations present a rich pool of often genuine and concrete ideas on what should be done by a variety of stakeholders to enhance passenger intermodality mainly in the long distance sector in Europe. The list of recommendations is of course not comprehensive, but it covers many of the core areas that must be addressed. The following picture gives an overview of them.

These recommendations include policy and funding ideas for the EU, international standardisation themes and intermodal service/ product ideas, all of which can be taken up and developed further by the organisations they are aimed at and potentially promoted by platforms, networks and interest groups.

¹ The final report "Recommendations and Strategies for Passenger Intermodality in Europe" is available on www.linkforum.eu as summary (24 p.) and as full version (194 p.).

Selected interlinkages between LINK recommendations



Joint WG of EU
3 Technology Platforms

European Vision/
1 White Paper for info services

2 Road-map for technical co-op. on intermodal journey planner

5 Advanced intermodal passenger care

6.1 European directive on travel planning data availability
6.2 Tariff and timetable info on request to authorities

"Vasco da Gama"
4 EU funding programme

6.3 Mandatory door-to-door info from rail-ticket distributors

17 Early information about airport links and accessibility

7 TAP TSI standard for electronic ticketing long-distance/ local

14 CityFlex pass

18 Push & pull strategy on business trips

15 Innovative local taxi services

16 Co-op. & info platforms mobility management for large events

9 City assessment tool and label

Assessment
13.1 methodology business plans

Flexible
13.2 profit sharing arrangements

8 Quality standards for interchanges

12 Integrated airport accessibility plans

11 Toolkit for a good design of interchanges

10 New business models for interchange management

19 Training and education

1.3 WP C.2: Post-project medium-term forum development strategy

The objective of the Medium-term forum development strategy (further referred to as “the Strategy”) is to explore the options of continuing the LINK forum and/or its agenda and derive a continuation plan which is properly resourced.

The Strategy should include the following content:

- a brief but clear “5 years from now” vision statement of future end-objectives, activities, external links, size and stakeholder structure of the forum which will ensure an independent, useful, sustainable and truly intermodal organisation,
- a desired and feasible organisational and financing model,
- an achievable road map to go from the state of the Forum at the end of the project to the desired *modus operandi*.

Within the Medium-Term Forum Development Strategy task we have been conducting the following activities to provide these inputs:

C2.1 Continuous dialogue on the future of the Forum (on-going),

C2.2 Medium-term Forum strategy member questionnaire (report D35 December 2009),

C2.3 Workshop to create first draft of the medium-term Forum strategy (in February 2010, draft strategy D38 in early March 2010),

C2.4 Validation of draft medium-term Forum strategy via consultation to forum partners (in March 2010),

C2.5 Plenary panel discussion at final Forum conference (March 2010), finalisation of medium-term Forum strategy (final strategy report D40 at end of March 2010).

This Strategy is therefore based on

- the continuous dialogue about the future,
- discussions with the policy advisory board of the project,
- results of the questionnaire realised within the LINK forum and key stakeholders and
- a workshop amongst partners and stakeholders using the results of the LINK medium-term strategy questionnaire,
- other consultation documents from WP A.4 and
- brain-storming methods with the input of selected forum stakeholders and organisers.

2 Analysis

This analytical part of the Strategy provides 4 contributory chapters: Views of the LINK PAB (Policy Advisory Board), initial views of the LINK consortium, results of a stakeholder questionnaire, and results from the LINK partners and stakeholders continuation strategy workshop.

Each of the steps builds on the previous one and brings in different or supporting views, remarks and requirements to the basic organisational, financial model and technical content of future activities. This analysis is then used in chapter 3, where a concrete proposal for how to further implement and develop the LINK agenda is presented.

The draft strategy which follows from these findings was published as Deliverable D38 and consulted via email, on the final PAB meeting and on the final conference with interested experts.

Then the major comments were implemented into the text and resulted into the Medium term Forum strategy.

2.1 View of the LINK Policy Advisory Board

The LINK policy advisory board (PAB) gave the following view on continuation of LINK.

The main potential useful activities / profile of a stakeholder led LINK forum in the future were considered to be the following:

- “lobbying” for the subject and developing funding tools as a champion of intermodal passenger transport at European and national levels,
- maintenance of a best practice database,
- directly developing one or two low costs key projects based on LINK recommendations,
- an advisory board as “technology platform” for research priorities and identifying projects for funding for the EU.

The financial model for such a forum was seen as potentially difficult for the reason that a useful neutral forum directed at high level EU policy and funding influence / dissemination level could not be sustainably funded by a few champion partners from regional / national administrations or some national / local PT operators.

This model might suffice for an interim period based on the enthusiasm of motivated members or for a limited Euro-regional approach, but sustainably justifiable funding for an EU level service can probably only come from a European level source such as an EU fund or an associated agency. It is very important that the forum does not become dominated by any one section of the transport chain with vested interest, such as a specific transport operators group.

LINK joining or transferring its agenda to part of an existing organisation was seen more realistic than starting a new organisation. LINK would need to try to find an organisation with a good fit.

EPOMM plus² was mentioned as a possible host, but it is members only, it currently has a different subject and a different mission. They are key in some dissemination activities though and it is clearly a potential partner for mobility management of long distance door-to-door trips.

It was concluded that it is:

- important to ask a sample of current/potential stakeholders if and how much they might contribute to a forum in terms of activity and financing and under what conditions,
- furthermore there should be discussion with the European Commission on potential funding outside of the research framework and emphasis of the clear added value of LINK as envisioned by the PAB should be made.

² EPOMM+, the European Platform on Mobility Management, is driven by national ministries which was founded after EU research project funding, survived for some time with own funding and is currently receiving funding from the IEE energy efficiency program (sub-programme STEER).

These preceding 2 points are addressed in detail in the following chapters (2.2, 2.3).

2.2 Initial view of workpackage C.2 on LINK agenda continuation

Our view in mid-2009 on LINK - backed up by the views of the policy advisory board and on-going discussions with stakeholders - was that the LINK forum in its current form and scope would not be sustainably financeable with a main base of just operators, national, local or regional members and funding due to its intermodal, European and long distance orientation. It lacks a natural advocate because it is policy oriented and promotes causes which cross modal and national borders.

In other words there is no clear “business” case for any limited group of commercial and public sector actors (aside from the EU or one of its agencies) to take LINK forward in anything close to the form that it has been set up as a project (i.e. with a European agenda and significant requirement of resources).

This obviously makes it very hard to find a way forward particularly as setting up any sort of formalised forum is a very resource intensive activity which will require some sort of direct or expected future return to the active party (financial return for the private sector or with benefit to own policy implementation for the public sector).

Therefore we have, from the start of developing the Strategy to go forward with LINK, taken a broader view of this task to cover the pursuit of the LINK agenda (excluding the direct activities of EU organisations) without necessarily restricting it to a single stakeholder Forum.

The following options are in our view realistic (isolated or in some combination) for pursuing different elements of the LINK agenda:

A) Bottom up LINK+ forum with own and external EU funding

- A core organisation with membership and governorship from national ministries / infrastructure operators, selected EU city representatives, a balanced set of operator representatives, etc. with own and EU funding participation. This group would need to seek “top-up” EU funding as per the example of EPOMM+.
- Suitable short-term funding source could be the FP7 research programme or IEE STEER which could provide stable funding on the back of a bottom-up membership model. An application for STEER could be made for the call in mid 2010. For FP7 the timing would be perhaps later in 2010.
- A major risk is that funding is short-term only and lacks guaranteed continuity.
- Time-scale: short-term (with support from EC to catalyse involvement).

B) Tendered / awarded “horizontal” project activity of an intermodal funding programme

- Research programme, other existing programmes (e.g. FP7, IEE STEER)
 - Time-scale: short-term in next year or so.
 - There are issues with having suitable terms of reference in these programmes.
- New ‘Vasco de Gama’ programme (LINK recommendation 4 “Introduce a new EU funding programme ‘Vasco da Gama’ for long distance passenger intermodality”)
 - Introduce within the frame of the forthcoming Marco Polo III programme a new EU financing programme to support projects with European added-value, with main emphasis on improving intermodality and integration in international long distance passenger transport solutions.
 - Funding of specific passenger intermodal projects (focus on demonstration).

- 100 % EU funded horizontal supporting activity within a Vasco De Gama type programme. This would most likely either an activity for a grouping of consultants to meet the EC's requirements in the area of programme support, propagation and dissemination or might include public-sector backing / membership.
- Time-scale: medium-term (earliest 2013).
- A LINK+ forum such as is described in part A might be able apply for this funding (as described in part A), but it of course would be open to all sorts of groupings who could further pursue the LINK agenda.

C) Transferring parts of the LINK agenda to existing projects and platforms with a broader remit

- This might be an industry backed technology platform with EU funding (see chapter 2.4.1), or other networks such as POLIS or UITP.
- The important thing is to find funding for the extension of the remit of such organizations and find actual interest in the topic within these organisations.
- Time-scale: short - medium.

In the following chapters, we examine these options in more detail through the feed-back received from LINK forum stakeholders and the project partners.

2.3 LINK medium term strategy questionnaire survey results

The main aim of the questionnaire survey was to find out potential stakeholders' views and interest in supporting a future LINK+ Forum and to answer what activities and structures they think are relevant and desirable and how they/ their organisation might support the forum in terms of activities and financing.

The questionnaire survey was made during September – November 2009. More than 300 potential respondents were addressed in their national language (questionnaires were published in 10 European languages: English, French, Germany, Czech, Poland, Netherland, Hungary, Romania, Spain and Sweden). The list of potential respondents contained representatives from public and private transport companies, state and city authorities, research institutions and transport operators. Major international organisations with possible interest in long distance multimodal travelling were also addressed (e.g. UITP, UIC, CER, IATA, EPF, etc.) within the questionnaire survey by email.

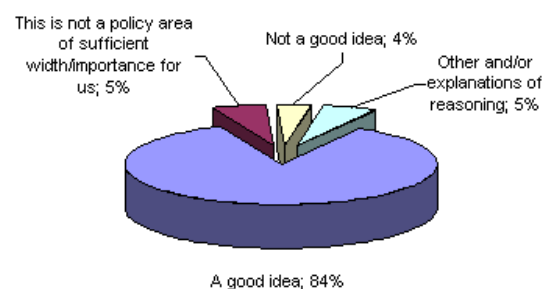
The sending sample was to a degree pre-selected to include individuals with a multi-modal interest. This was confirmed in the response rate with a majority of people with multi-modal interests. The target sample of 55 replies from 300 sent was reached. The majority of answers (60 %) but by no means all were received from those already acquainted with LINK in some way.

In the following pages we summarise the main findings of this survey, which are described more in detail in the Medium-term Forum Strategy Questionnaire Report (D35).

2.3.1 Benefits, popularity of LINK

The LINK+ Forum is considered to be a good idea worth continuing by the vast majority of questionnaire respondents (84%) as can be seen from the following pie chart.

7. What is your overall opinion(s) on continuing the LINK Forum?



2.3.2 Technical content of LINK+ forum

The respondents indicated that the future work should have a primary focus on

- Workshops, conferences and networking,
- Best practice documentation
- EU policy position papers and policy “lobbying”
- Developing pilot projects

The lowest support was shown for providing a research advisory base. Having said this, there was no really clear cut single priority and all activities had at least some support.

Thematic interests of the respondents were broadly in line with the wide scope of issues that we have covered in LINK with the highest interest shown in interchanges and integration of long distance transport with the last urban mile. The lowest interest was shown in information and ticketing.

2.3.3 Organisational models, membership

Respondents most indicated that transport service operators should be included in a future LINK Forum (73%). The second preferred group was of representatives from Ministries (almost 61%) and public transport authorities (52%). This answer expressed the general opinion that there is a need of strong stakeholder support to help implement any new solutions and ideas. Other groups were not excluded however although support for consultant, local authority membership and other government agencies was low.

Over 50% of respondents thought that it is necessary to maintain an equal partnership across the whole spectrum of stakeholders. Generally the respondents felt that the engagement of themselves or their companies is possible and desirable and over 70% of all respondents or their organisations were willing to engage in the future LINK forum activities. Nearly half of respondents were interested in active contribution to working groups and 10 % in the management of the forum itself with one candidate to lead the forum.

2.3.4 Financing models

The majority opinion on the financial model of the future LINK forum was that the Forum could work well only when additional external funding (e.g. EU funding) will be ensured. Only 1 respondent believed that such a forum could be self-financing.

From the 50+ respondents it would seem that we could raise up to circa 20 000 EUR per year. Few organisations would be willing or able to pay more than a few hundred EUR per year, which is enough only for a low level of activity without external funding. Strong support was given for seeking external funding.

From the comments, it seems the financial and economic crisis has also made it much less realistic to secure funds for such non-mainstream activities involving non-standard outgoings (ministries have trouble with paying membership fees).

As might be expected for a forum with a high-level European focus, we see little interest from respondents in substantially financing an organisation of a few, which would fund the interests of the many.

Partner participation in specific projects or programmes funded by the European Union seems more likely and perhaps this offers a way to continue some of the LINK activities in the short term through programmes such as IEE STEER, FP7 or a future passenger transport ‘Vasco de Gamma’ programme (analogue of Marco Polo programme for freight) as indicated in chapter 2.2. Willingness to substantially co-fund was still quite low however.

2.4 LINK continuation strategy workshop results

The LINK continuation strategy workshop was held on 22nd February 2010 in Brussels. The main aim of the workshop was to find out views on the open questions related to technical content, organisational and financial aspect from the side of the LINK consortium, representatives of experts and from the side of EC.

In general, the workshop participants supported the idea of a LINK+ forum but not copying entirely the current structure. In terms of technical activities, the project should focus more on some special topics and link them with practical aspects connected with best practise which will show really concrete experience. This is described in more detail in the next chapters.

2.4.1 Possibilities of LINK agenda transfer into the existing activities

The following chapter examines the serious options to transfer the LINK agenda at least in part with a prospect of attached funding:

A) Technology platforms funded by FP7

The main task of technology platforms (first founded in 2004), funded by the EU research framework programmes is to define technology research priorities, strategic research agendas in the related fields.

In the field of transport technology, platforms such as ERTRAC (European road transport research advisory council), ERRAC (European Rail Research Advisory Council), ACARE (Advisory Council for Aeronautics Research in Europe) and WATERBORNE (sea and inland sector) exist. In general, the stakeholders are mainly from the industry side and themselves fund their own costs in participating in technology platforms. Limited Community support for funding operational entities (for example a Secretariat) can however be mobilised.

The workshop participants agreed that:

- The current platforms are not seriously addressing the LINK agenda, they are modally focused or focused on intermodality in urban transport.
- Technology platforms have potential to attract key stakeholders, but it is not too feasible to create a dedicated technology platform for intermodal passenger transport given that there are a number of existing platforms with overlapping platforms.
- The only realistic way forward is to get the LINK agenda on the agenda of existing technology platforms.

A LINK recommendation³ has been proposed to establish a Joint Passenger Intermodality Working Group of the existing modally focused European Technology Platforms (ETP's)

The recommendation proposes the potential connection of existing ETP's in the field of passenger transport to support the elaboration of intermodality roadmaps, strategic research agendas and to foster networking between key stakeholders. The proposal to join existing platforms to set-up a joint working group on the topic of Passenger Intermodality suggests to include the

- European Rail Research Advisory Council (ERRAC)
- European Road Transport Research Advisory Council (ERTRAC)
- Advisory Council for Aeronautics Research in Europe (ACARE)

³ Recommendation 3 "Establish a joint Passenger Intermodality Working Group of existing European Technology Platforms in the field of passenger transport"

- Waterborne ETP
- + additional stakeholders (e.g. EPOMM plus)
- + representatives from DG MOVE, DG RTD, etc.

The suggested focus of this working group with a 2 person secretariat was the following:

- Elaboration of Intermodality Roadmaps;
- Definition of Passenger Intermodality Strategic Research Agendas as input to EU research programmes;
- Creation of effective links between the existing ETP's and channelling priority topics for passenger intermodality back into the ETPs' activities;
- Networking between key stakeholders in Passenger Intermodality;
- Connection to relevant standardisation activities (e.g. TAP-TSI) and UIC and UITP actions;
- Quantifying the benefits of Passenger Intermodality;
- Support in developing an implementation oriented Passenger Intermodality Programme (see LINK recommendation on "Vasco da Gama" programme);
- Support sharing of best practice examples between modes and across national boundaries.

The workshop participants expressed the following views on the joint working group:

- The full proposed activity list is unrealistic given that the platforms currently have a mandate to help with research strategy and priorities. This mandate may be extended in the future but it is not for sure. To have a one person secretariat in a joint working group is also unrealistic given the existing forums have much less support resource for a wider scope of subject matter.
- If the LINK agenda is to be pursued in such a joint group it should have strong support from someone in ERRAC (strong position of stakeholders). Two potential issues could be addressed: 1) control research and 2) co-ordinate development in the area of long distance intermodal passenger transport.
- In any case the platforms have their organisational structure and the role of LINK would be to make this suggestion and propose topics for the research agenda rather than assume the coordination role.

Conclusion: A joint working group between the existing technology platforms on intermodality would be desirable and feasible but could only address the research part of the LINK agenda and would not be driven by LINK members.

B) EPOMM+

EPOMM+ is a platform for mobility management driven by national ministries which was founded after various EU research project funding of mobility management, survived for some time with its own funding and is currently receiving funding from the IEE energy efficiency program (sub-programme STEER).

EPOMM+ is a legal entity and also it is the good example for LINK forum which can show the possible way for development of future activities and strategy. At the beginning the content of the group activities - mobility management - had a fuzzy definition (similar to intermodal passenger transport).

One key player (Dutch ministry) together with a private partner (FGM-AMOR) has driven the forum, not without risk, and has created a clear vision of mobility management and attracted more partners to be involved within this platform (ministries, agencies). Last year they received funding from the IEE

STEER. From this practical example follows one strong requirement: “The necessity to find a strong public sector and private partner to drive the action”.

Conclusion: EPOMM+ is a good example for LINK to take inspiration from. Some of the recommendations of LINK also might be interesting for EPOMM to pursue (e.g. mobility centres for large events), however it is unlikely that EPOMM+ could become a home for a large part of the LINK agenda.

2.4.2 Preferred focus and technical content of LINK+ forum, membership issues

The workshop participants took on board the questionnaire results and made the following points on the focus of LINK+:

- High importance can be seen in best practise examples. It is not easy to implement successful solutions wherever you want only copying the best practise solution. Local differences exist and it is necessary to understand the situation to transform it into an effective solution in another place: e.g. why do the conditions differ in UK and in Sweden? how to adapt conditions for feasible implementation?
- When we compare the LINK project with the long distance focus with project IFM (interoperable fare management project) realising the intermodality of all kinds of trips, the weakness of LINK is in the low number of trips involved but the importance of these trips is high. It is necessary within potential LINK+ forum to involve more trips and more influence and support also big cities, i.e. to move away from a purely long distance focus.
- LINK fills the gap between rail, bus and interurban (or large agglomeration) transport. With liberalisation of the market arises the question how to reach connection between these modes. It is not easy to reach interoperability in the country and even more in the international aspect. And this is the place for LINK+ forum activities.
- LINK also proposes the new design of interchanges. But to successfully implement proposed solutions it is necessary to be actively involved and engage ministries because they have power to act and decide.

The forum has to offer direct added-value to its members. Practical needs in the future LINK forum+ based around stakeholders should therefore include:

- Developing the details of and testing the more practical / localised recommendations (such as quality standards for interchanges, a city assessment tool and label for long distance intermodality development of a Toolkit for a good design of an interchange, etc.);
- Planning and developing common projects / co-operation between partners travel systems (e.g. information, ticketing, etc.);
- More descriptive benchmarking of best practice amongst forum member (involving analysis of transferability, site visits etc.).

A question which arose from this discussion is whether the long distance focus is too narrow for future activities. It may be wiser to extend it to include urban intermodality in particular for interchanges.

2.4.3 EU financing options for LINK+ and implementing the LINK agenda and recommendations

Possibilities of pursuing LINK+ and the LINK agenda are dependent on the size and priorities of possible external funding sources as it is already clear that LINK self-funding opportunities are limited (see chapter 2.3). Start-up and continued funding will require a source, ideally from the EU.

The main EU funding opportunities are now described in more detail but there are no *currently existing* funding tools which can currently fund a LINK+ forum with a scope as desired by LINK stakeholders. The funds mainly offer the chance to coordinate research, fund some of the LINK recommendations and develop intermodal products.

C) EU FP7 funds (EU research programme)

EU FP7 funds provide a possibility of research funds for coordination actions. There are no current calls open, however. There is an assumption that something might occur before the summer of 2010 but there is a limited amount of money within the programme budget of DG MOVE (new DG having taken over transport role of DGTREN).

The previous call of 2009 which is now closed and being evaluated may give rise to one or two projects addressing networking and research co-ordination in the area of intermodal passenger transport. The proposals that went in may take on some of the LINK agenda (at least development of research ideas), but this is not yet clear. At the moment no information on these proposals was available and so they can't be taken into consideration in the plan.

Two possible calls in 2010 will be for traveller services: Integrated intermodal traveller service and International cooperation (research and demonstration collaborative projects) with a strong ITS dimension. These may provide the opportunity to pursue some of LINK recommendations and some of the products promoted by LINK (e.g. a European travel planner service) and fund some research coordination.

The text of these calls is almost prepared within the programme for sustainable transport (DG Research), DG Research has the budget for these activities. DG Move has only role of consultation support and cannot easily change the text of the calls. The potential to influence calls more actively from DG Move is realistically from 2013.

D) IEE – STEER

Within the IEE - STEER programme for energy efficiency there is also a chance to gain funding.

STEER funds essentially « soft measures », such as:

- measures to increase the demand for sustainable transport (e.g. campaigns, information, dissemination);
- replication and gaining higher market penetration of successful experiences or policies;
- transfer of experience, promotion of best practices, education and training, capacity building.

STEER doesn't fund:

- Infrastructure investments;
- Research and development projects.

The proposal of the project has to strongly demonstrate encouraging of modal shift, estimates what will be the effects on energy savings, emissions and energy savings, etc. The effects of the project have to be clearly proved.

In the upcoming call in the spring of 2010, the only relevant priority is for urban transport, so the focus of any work would have to be closer to interchanges and must address the last-urban mile if it is to overlap with the LINK agenda.

Priorities of STEER for 2010 related to at least part of the LINK agenda include – **next calls will be published in late March 2010, with a deadline of June 2010:**

- Energy-efficient transport

- Promote, based upon common approaches, the auditing & certification of integrated urban mobility policies and plans, including Europe-wide information exchange to share experiences and best practices.
- Promote safe walking & cycling by:
 - › integrated planning approaches;
 - › awareness raising campaigns for sustainable mobility behaviour.
- Capacity building + learning
 - Promote mutual learning through staff exchanges (e.g. “shadowing”, on-the-job training or internships).
 - Support to teaching at academic level
 - › networking, staff exchanges, joint seminars, joint site visits, the development of joint teaching and information material.
- Dissemination and support initiative in the field of energy aspects on urban mobility
- Europe-wide awareness campaign on sustainable urban mobility

A project aspiring to funding within STEER has to address these programme priorities.

IEE - STEER provides a clear known short-term funding opportunity to continue LINK at least in some form.

E) INTERREG

INTERREG ("**European Territorial Cooperation**" objective) is an EU-funded programme that helps Europe's regions form partnerships to work together on common projects. By sharing knowledge and experience, these partnerships enable the regions involved to develop new solutions to economic, social and environmental challenges.

All EU Member States (and in some cases Switzerland, Norway and other non EU countries) can benefit from the cooperation programmes under the "European Territorial Cooperation" objective.

3 types of cooperation are supported under this objective:

- **Cross-border (INTERREG IV A):** Eligible zones lie along all interior borders of the EU. Each zone consists of two or more Member States and is managed by one Managing Authority. An example of such cooperation is the INTERREG IVA programme Czech Republic-Slovakia. Common cross-border investments are supported.
- **Trans-national (INTERREG IV B):** Pilot projects, investment preparation and light investments are allowed within this type of cooperation. Regions (cities) are committed to a joint action.

About 13 INTERREG IVB Operational Programmes were approved for 13 different zones within the EU. This includes:

- INTERREG IV B NORTH WEST EUROPE
- INTERREG IV B ALPINE SPACE PROGRAMME
- INTERREG IV B Central Europe Programme
- INTERREG IV B South-East Europe
- INTERREG IV B Baltic Sea Region
- INTERREG IV B North Sea Region
- INTERREG IV B Mediterranean Area

Currently within the call announced on 12th of March 2010 with a deadline for proposals on April 9th 2010, the INTERREG IVB Programme for North West Europe invites applications for Strategic Initiative projects in the following areas related to the agenda of LINK:

A: Innovative approaches to urban, inter-urban and rural public passenger transport. Projects could include a number of related dimensions:

- The development and testing innovative of passenger transport technologies and systems, which allow public authorities to address congestion-related, environmental and connectivity challenges in a more cost effective and environmentally sustainable way than conventional rail or light-rail solutions. This could include tram-train systems, high quality bus-based operations or waterway-based public transport. The focus should be on innovative technologies which can contribute clearly to reduction of CO2 emissions: heavy rail and “conventional” bus operations are excluded.
- Attracting (potential) public transport consumers, through effective marketing and awareness-raising approaches to encourage modal switch and greater usage of public transport and promote environmental and congestion-related benefits. Particular emphasis should be given to the contribution of increased public transport use to the reduction of CO2 emissions. Clearly defined outputs must be specified.
- Innovative approaches to financing passenger transport investment, taking into account (e.g.) congestion charging models, use of planning gain revenue and other factors. Projects could also examine modes of cooperation between levels of government, local authorities, particularly for financing inter-urban (or transnational) transport links.
- Innovative ICT solutions and non-technological approaches aimed at reducing the need to travel and replacing physical passenger mobility with virtual activity, by providing, for instance, easy access to services and information.

This instrument basically offers the chance to fund pilot implementations. The call is open to 9th of April which is very tight time to prepare any proposal from the current consortium of LINK but it gives clear view on what topic can be potentially called in future.

- **INTERREG IV C:** Regional Initiatives in Interregional INTERREG IV C could involve projects initiated by actors at the regional and local level aiming at exchange of experiences in a specific policy field and the development of new tools and approaches to policy.

The same LINK ideas and methods as have been proposed for a STEER proposal could be addressed given appropriate call priorities under priority 2 “environment and risk prevention” subtheme “energy and sustainable transport” and possibly in priority 1 “Innovation and the knowledge economy” subtheme ICT (in particular “promoting the use of new information and communication technologies by businesses, public services and the general public”), intermodal information and ticketing services promoted by LINK could be addressed.

No relevant calls for INTERREG IV C initiatives are currently open.

LINK partners are communicating with LINK stakeholders and monitoring opportunities for use of the INTERREG programme to pursue the LINK agenda at this regional cooperation level.

F) VASCO DA GAMMA (from 2014 - proposal)

‘Vasco da Gama’ is a LINK proposal of new funding programme for long distance passenger intermodality. The proposal suggests introducing within the frame of the upcoming Marco Polo III programme support for projects with European added-value with a main emphasis on improving intermodality and integration in international long distance passenger transport solutions.

This programme could finance not only pilots, but also a horizontal networking and policy think-tank organisation such as LINK, if so set-up.

Realistically the start of this programme will be at the earliest in 2014. This task requires finding relevant people interested in this idea who will be able to strongly support it. It is necessary to activate Member States, big transport operators, industrial representatives, and both sectors public and private representation are required to transfer this idea into reality.

Currently there are a lot of arguments supporting this idea and many excited experts from transport and service operators. Now the key point is to find strong arguments for this programme: cost benefit impacts, efficiency impacts, impact assessment, etc. and get support of the member states, which would have to back it.

The 'Vasco da Gama' programme proposal appears to be the best and currently only opportunity to fund both a made-to-measure LINK type horizontal activity covering the full scope of the LINK project and pilot projects which could be prepared under its umbrella.

2.5 Summary and conclusions of analytical part

This analytical chapter has shown that

- the LINK project has produced outputs and a network that are considered valuable and appreciated by its stakeholders,
- there is a desire from a number of stakeholders to continue with a stakeholder forum with a wide range of coordination and technical activities,
- as to be expected for a forum with a high-level multi-modal European focus, we see little interest from respondents in substantially financing such a broad reaching activity, which would benefit many without necessarily providing direct and intense commercial or even policy gains for individual stakeholders,
- there is therefore also a problem to find an organisation willing to drive the continuation of LINK without a clear promise or hope of sufficient funding or self-benefits,
- the most realistic short-term continuation option for parts of the LINK agenda, is therefore through the pursuit of external (EU) funding and a number of partial existing short and medium-term opportunities have been identified including FP7, IEE STEER and INTERREG,
- the conditions of such funding largely dictate what can be funded and none of them covers the full range of the current or proposed LINK agenda. Probably none could fund a LINK+ stakeholder forum as currently conceived,
- a joint working group between the existing technology platforms on intermodality (funded through FP7) would be feasible to define the research agenda but would not be driven by current LINK members,
- a made to measure programme for long distance passenger intermodality - Vasco da Gama has been proposed in LINK, which would fall under the existing MARCO POLO programme. This would provide the best opportunity to fund both the LINK+ forum and pilot implementation projects but if approved would only be realistic from 2014.

The following table provides a short summary of potential financial sources for financing of future activities of the LINK and also provides a brief description of what activities could be financed and what is the limitation of this funding source.

Source	Provides:	New possible call	Current options	possible LINK activities financing
Short or medium term				
EU FP7	research funds for coordination actions	no current call open call in July 2010	one or two projects addressing networking and research co-ordination in the area of intermodal passenger transport from last call in 2009. two possible calls in 2010 will be for traveller services pilots: Integrated intermodal traveller service and International cooperation (research and demonstration collaborative projects) with a strong ITS dimension.	networking and research coordination actions.
IEE-STEER	financing of « soft measures », such as: <ul style="list-style-type: none"> • measures to increase the demand for sustainable transport (e.g. campaigns, information, dissemination) • replication and gaining higher market penetration of successful experiences or policies • transfer of experience, promotion of best practices, education and training, capacity building 	in April 2010 - relevant priority Urban transport	<ul style="list-style-type: none"> • Energy-efficient transport • Capacity building + learning • Dissemination and support initiative in the field of energy aspects on urban mobility • Europe-wide awareness campaign on sustainable urban mobility 	
INTERREG	helps Europe's regions form partnerships to work together on common projects	The 6th Call for Proposals opens on Friday 12 March and closes on Friday 9 April 2010 at 12 noon. The Call is open for all 4 priorities and for Strategic Initiatives.	<ul style="list-style-type: none"> • cross-border (INTERREG IV A): • trans-national (INTERREG IV B): • interregional (INTERREG IV C): 	<p>pilot projects</p> <p>pilot projects, investment preparation and light investments are allowed</p> <p>exchange of experience and some light pilot initiatives - developing and testing methodologies and tools</p>
Long-term				
Vasco de Gama	for projects with European added-value with a main emphasis on improving intermodality and integration in international long-distance passenger transport solutions	Realistically the start of this programme is at the earliest in 2014		the relevancy depends on the final structure of the programme. Proposed to fund LINK+forum and pilot projects

3 Vision of how LINK will look like 5 years from now and how this will be achieved

This section takes the analysis of chapters 1 and 2 and the other experiences of LINK and turns it into a brief, practical vision and road-map for the further pursuit of the LINK agenda.

3.1 Why a LINK+ Forum

The LINK project forum has produced practical, focused outputs and a network that are considered highly valuable and appreciated by its stakeholders, which include transport policy makers and operators of many modes at international, national, regional and urban levels.

Door-to-door long distance European passenger intermodality, which is a key priority of EU transport policy, has no natural driver either in the public sector amongst national or regional policy makers or amongst operators/modes as it crosses many boundaries (national, regional, modal, private-public). Therefore it is essential that help is given at the right level to develop a strong stakeholder organisation that can support and promote the development of research, policy and pilot projects in this field.

To confirm this need, there is a clearly expressed desire from a number of LINK stakeholders to develop an even stronger stakeholder forum with a wide range of coordination and technical activities.

3.2 LINK - 5 years from now

5 years from now we envision the following future for the LINK forum (LINK+) and the pursuit of its agenda:

Objectives and Focus of LINK+ Forum

The main objective of LINK+ will be to further promote the development of intermodal passenger transport in support of developing more competitive and sustainable transport. LINK+ will therefore extend its focus to cover all areas of passenger intermodality including urban and regional trips but will retain its special identity with long distance passenger intermodality.

LINK+ will continue to address a wide range of topics but with a primary focus on promoting and developing passenger intermodality policy and projects for the last-urban mile, interchanges, urban and regional inter-modality and the planning of intermodal passenger transport.

LINK+ will focus mainly on the following activities subject to conditions of external funding allowing it which will serve the interests of its members:

- Workshops, conferences and networking,
- Best practice documentation
- Creating EU policy position papers
- Preparing and developing pilot projects
- Supporting development of the European research agenda

LINK + will move towards developing the ideas that have arisen in LINK by including in the technical work of its working groups and networking events the following activities:

- Developing the details of and testing the LINK recommendations which are aimed at national, regional and urban institutions,
- Planning common projects / co-operation between partner travel systems (e.g. information, ticketing, etc.),
- Initiating the development of pilot projects within the new 'Vasco da Gama' programme and other European and national funding programmes such as the framework programmes, INTERREG and IEE STEER;
- Descriptive benchmarking of best practice amongst forum member (involving analysis of transferability, site visits etc.).

Organisation of LINK+ Forum

LINK+ will be a forum with a formal organisational status of at least 20 members drawn from the LINK stakeholder base and others with a balanced membership of ministries, cities and regions, major long distance and local operators of a number of modes, research organizations and other partners which add value and are involved in intermodal transport. It will be governed by its members and have an executive secretariat of at least 1 full-time technical person and additional staff contracted based on project funding. Initially we would expect involved individuals to be experts at middle levels of management rather than senior decision-makers.

Financing and funding of LINK+ Forum

LINK+ will have nominal membership fees of not more than 2000 EUR per year on average but will be graded according to the size and type of member organizations. It will gain its main medium to long-term funding from the newly formed Vasco de Gama programme for intermodal transport which will begin in 2013.

The overall funding for LINK should be up to 1 million EUR per year and should cover the full period of the programme to ensure maximum stability.

LINK + Forum links and relationships

LINK+ will have strong relationships links with modal multi-national operator representative groups such as UITP, UIC, CER, IATA, EPF, ERA, POLIS, EMTA and others.

LINK+ will have a strong relationship with technology platforms such as the European Rail Research Advisory Council (ERRAC), the European Road Transport Research Advisory Council (ERTRAC) and the Advisory Council for Aeronautics Research in Europe (ACARE) and whatever new platforms arise.

Transferring the LINK agenda for research coordination

A Joint Passenger Intermodality Working Group of existing passenger transport orientated European Technology Platforms (ETPs) will be formed including at least

- The European Rail Research Advisory Council (ERRAC) and
- The European Road Transport Research Advisory Council (ERTRAC)

This Joint Passenger Intermodality Working Group would work closely with LINK+ to develop the European research agenda for passenger intermodality and will use the LINK deliverable "Identification of needs for further research" as a basis for its work.

Funding of development and implementation of the LINK recommendations and pilot intermodal passenger transport services projects

Various EU funding tools including EC contract funds, FP7, IEE STEER, INTERREG and the proposed new EU 'Vasco da Gama programme' (a recommendation of LINK) as well as national programmes will be used to implement the various LINK recommendations and pilot intermodal passenger transport projects.

4 Road map to achieve the Vision

This section takes the analysis of chapters 1 and 2 and the Vision of chapter 3 and other external inputs and creates a road-map for the further pursuit of the LINK agenda.

4.1 Starting point of the road map

As described in the analytical section, LINK is currently a project managed by a group of research organisations, networks and consultants with a high level of external stakeholder awareness. It is not yet a forum in the sense of a formalised stakeholder group with its own organisation and financing model.

The focus of LINK has been on policy for long distance passenger intermodality mainly on the European level. The intermodal long distance topic lacks a direct advocate amongst single mode operator groups or single governments / authorities. It promotes the common good and promises social and commercial benefits spread out across all the actors. The cost-benefit arguments of various intermodal passenger products however are still not clear or demonstrated and a lot of research still needs to be done.

The topic is also still at best a research priority of the European Commission and of the existing European or national transport policies. In this context, and in the light of evidence presented in chapter 2, to build up a stable LINK+ forum based on active stakeholder members will be impossible in the medium term without a strong and well aligned external funding mechanism to provide a sufficient level of motivation.

Based on the review of existing financing sources presented in chapter 2, there is currently no suitable source of funding for a continuation of the LINK forum which would allow it to develop its full agenda in anything close to its current or desired form.

There is however a number of funding opportunities which may allow pursuit of some parts of the LINK agenda and specific LINK recommendations.

4.2 Summary of the road map content and harmonogram

In the following sub-chapters we address the road-map for the following key topics for LINK development.

Short-term political marketing of LINK describes how we plan to address the essential task of raising the political awareness of the importance of the project and its output.

LINK+ Forum and initiation of 'Vasco da Gama' programme describes what needs to be done in the short and medium term to fund a continuation of the LINK forum and the funding of key pilot and demonstration projects.

Developing and transferring the LINK research agenda describes how we recommend transferring the care of the LINK research agenda to other actors.

Developing and funding implementation of the LINK recommendations and some networking activities describes in detail the short-term opportunities for funding and what actions can / are being taken to utilise these.

The following harmonogram summaries the timing of the key milestones and actions identified in these subsequent chapters.

2010	Political marketing and realistic project proposals
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1. LINK reception in Brussels the EP's Committee on Transport and Tourism sponsored by MerseyTravel to sell the LINK ideas – May/June 2010.
2. LINK partners and other stakeholders to contact member states representatives and support creation of Vasco da Gama programme within Marco Polo – May 2010.
3. Calls of IEE STEER and FP7 and possibly INTERREG IV B or C or with involvement and drive of some LINK partners.

2011 – 2013	Implementation of projects + other opportunities
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1. Implementation of any projects from 2010 funding calls.
2. Utilise any further as yet unknown relevant call opportunities in IEE STEER, INTERREG IV and the EU Framework Programme for Research to pursue parts of the LINK agenda.
3. Possible implementation of a Joint Passenger Intermodality Working Group of existing passenger transport orientated European Technology Platforms (ETPs) within FP7.

Latest mid 2013	EC Call for horizontal activity LINK+ in Vasco da Gama funding programme
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2014 – 2021	Vasco da Gama funding programme
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1. Intermodal pilot/demonstration project funding
2. LINK+ horizontal coordinating activity to Help to EC in stimulating and helping suitable projects, developing policy ideas, coordinate research agenda

4.3 Short-term political marketing of LINK

The LINK project and its outputs needs to be put higher up the political map, a process which was started with the final LINK conference in Brussels on the 30th of March 2010 which was attended by MEP⁴ Inés Ayala Sender.

The following short-term strategy is suggested:

1. A reception in Brussels will be held for the EP's Committee on Transport and Tourism, sponsored by Merseytravel, to sell the LINK ideas (possibly May/June 2010).

Key content to present:

- Present the main recommendations of LINK;
 - LINK is a successful project with practical ideas which should be integrated into EU policy and funding programmes;
 - Need to assure a prominent place for long distance intermodal passenger transport in the EU transport policy new White Paper;
 - Need to continue funding a LINK forum, set-up the 'Vasco da Gama' programme and to adjust the priorities of existing EU funding tools to allow funding of LINK recommendations and pilot intermodal products and services.
2. LINK partners and other stakeholders will contact member states representatives for the Marco Polo programme (funding of mode-shifting intermodal freight transport projects) and support creation of Vasco da Gama programme passenger intermodality funding within the funding base of this programme – May 2010.
 3. Individual dissemination of the LINK outputs and ideas to other selected influential high-level stakeholders – 2010.
 4. Other activities aimed at MEP's and high level EC decision makers - to be defined by LINK partners from 2010 onwards.

Action: LINK partners support these initiatives.

4.4 LINK+ Forum and initiation of the Vasco da Gama programme

4.4.1 Short-term funding options

There are no current short-term funding opportunities to set-up and operate a LINK+ forum with anyway near the scope desired in chapter 3.1. However some partial opportunities exist..

Self-funded work group meetings

Some work group leaders will examine the feasibility of running occasional expert workshops funded by a fee paid by the experts' organisations.

FP7 (EU Research Programme)

A partial continuation of LINK coordination activities (probably coordination of some research activities) may come through the bids of the last call in 2009 for FP7 if a number of projects proposals are merged.

Some coordination of passenger intermodality research may also be possible within the FP7 4th SST TPT.2011.2-1 call in July 2010: *"Integration of passenger transport modes and travel information*

⁴ MEP –member of European Parliament

services through the analysis of social behaviour mobility patterns and business models as basis for the decarbonisation of the European transport system”

4.4.2 Medium-term home of LINK+ Forum and funding of intermodal demonstration projects from 2014: the Vasco da Gama programme

As described in chapter 2, Vasco da Gama is a LINK proposal of a new funding programme for long distance international passenger intermodality. The proposal suggests introducing within the frame of the upcoming Marco Polo III programme support mainly for pilot and demonstration projects with European added-value with a main emphasis on improving intermodality and integration in international long distance passenger transport solutions.

This is essential for proving and establishing innovative products and concepts both in the private and public spheres.

Support for the establishment of a Vasco da Gama programme within the EC is currently unknown, but it can be expected that a strong lobby will grow for it amongst operators and possibly member states and that it is a realistic prospect. If successful it will also be a reflection of just how seriously this topic is being taken within the European transport policy.

In order to have a chance of effectively developing further as a forum in the medium-term, LINK+ needs its own specific external funding source, with programme priorities which fit its remit. No such funding source currently exists.

The LINK+ Forum should thus become an integral part of the Vasco da Gama programme as a horizontal coordinating activity with roles as highlighted in the vision of chapter 3.1. In this capacity it would greatly help the EC in stimulating and helping suitable projects, developing policy ideas and coordinate the research agenda alongside the project demonstration agenda. Given the lower maturity and lack of natural market advocacy of long distance passenger intermodality, this is an essential widening of the Marco Polo remit, which represents a mature freight market, where all projects are expected to be commercially viable beyond seed funding and where European policy is very clear and supportive.

The EC should make a call for this horizontal project as the first step of the Vasco da Gama programme. The call for proposals should require a strong stakeholder structure, with stakeholders as project partners and committed personnel resources of the stakeholders themselves:

- A condition of funding could be the requirement to go on to form a legal forum organization of partner stakeholders.
- The applicant should demonstrate a critical mass of stakeholder membership and cover all the key stakeholder groups (ministries, cities, major operators of all modes or mode / city representative groups). Funding should cover 100 % of costs and be circa 1 million EUR per year. This should provide sufficient motivation for stakeholder participation.
- In this way, the organizational structure of LINK+ could be migrated from a project organization to a legal entity of stakeholders after funding was secured in the first programme period.

This call would be feasible at the earliest in mid 2013 to cover the new funding period from 2014.

Action: *all LINK stakeholders will shortly be requested to actively support and promote this programme proposal at the national representative level.*

4.5 Developing and transferring the LINK research agenda

4.5.1 Future research idea base

LINK has done the „Identification of needs for further research“ (report/ Deliverable D23b). For this, five key researchers were interviewed, US-European research programmes were analysed and 120 responses from LINK's Mid-term consultation were taken into account.

The importance of standardisation and harmonisation were highlighted but also stressed as research issues:

- How shall we use infrastructures (in a broad sense, not just roads or railways) in a way that improves Intermodality
- How shall we overcome cross-border discrepancies
- How shall we create an intermodal culture
- How shall we integrate soft modes (walking, cycling, motorcycle use) with other modes
- How shall we make the best use of new IT solutions for intermodality

Action: *This report has been delivered to the EU (DG MOVE) as well as the recommendations, some of which will be considered individually by the EU for inclusion in the research programme.*

4.5.2 Joint Passenger Intermodality Working Group of the existing modally focused European Technology Platforms (ETPs)

As was described in chapter 2.4, a joint working group between the existing technology platforms on intermodality could be formed to address the research part of the LINK agenda but would not be driven directly by current LINK partners / stakeholders. This would adopt the LINK report - Identification of needs for further research as its basic starting point.

The recommendation proposes the potential connection of existing ETPs (technology platforms) in the field of passenger transport to support the elaboration of intermodality roadmaps, strategic research agendas and to foster networking between key stakeholders. The proposal to join existing platforms to set-up a joint working group on the topic of Passenger Intermodality suggests including the following organisations.

Essential existing technology platform members

- European Rail Research Advisory Council (ERRAC)
- European Road Transport Research Advisory Council (ERTRAC)

Possible supporting members

- EIRAC (European Intermodal Techn.Platform)
- Advisory Council for Aeronautics Research in Europe (ACARE)
- Waterborne ETP
- + additional stakeholders including EPOMM (European platform for mobility management), EIA (European Intermodal Association), EMTA, UITP, EIA, POLIS, UIC, EPF, CER, IATA and others
- + representatives from DG TREN, DG RESEARCH, etc.

Funding in the order of tens of thousands of EUROS per year could be applied for and secured within a future call for ETP funds within FP7. The timing of such a call is unknown.

Action: *The existing LINK members with a research or network background involved in ERRAC and ERTRAC are actively promoting this idea with these two organizations, as they will be the ones who will have to drive the idea to realization. Close cooperation with any future LINK+ would be expected.*

4.6 Developing and funding implementation of the LINK recommendations, other networking opportunities

4.6.1 Funding opportunities for developing the LINK recommendations - generally

The following short and medium-term options are suggested for potential development/implementation of the 19 LINK recommendations in the short and medium-term. More information about each recommendation is available in the “Recommendations and Strategies for Passenger Intermodality in Europe” (download from the project website www.LINKforum.eu).

Recommendation		Identified research / study need	Possible <u>existing</u> financing tools for implementation
1	Create a European vision/White Paper for a European door-to-door intermodal passenger travel information service	Study commissioned by the EC to assess what sort of long distance passenger travel information service is possible and realistic to deliver at the current time.	EC contractual task
2	Develop a road-map for technical co-operation in achieving a European door-to-door intermodal journey planner	Development of road-map could be part of feasibility study proposed in recommendation 1.	EC contractual task (possibly as part of ITS Action plan implementation or Transport White paper - see 1)
3	Establish a joint Passenger Intermodality Working Group of existing European Technology Platforms in the field of passenger transport	Definition of Strategic Research Agenda for the field of Passenger Intermodality.	EU research programme
4	Introduce a new EU funding programme “Vasco da Gama” for long distance, international passenger intermodality	Modal shift demonstration activities. Catalyst actions that focus on fostering innovation. Common learning actions to foster European exchange. Including monitoring and evaluation elements.	Is a special new EU programme, might be designed within an EC contractual task or with the EC research programme
5	Work towards advanced intermodal passenger rights	European platform on passenger rights as one source for all modes and all countries on a website. Studies on evaluation of regulations.	EU research programme or contractual task
6	Establish obligatory delivery of data and information in the field of ticketing and information	Requirements and standards of the directive	EU contractual task as part of directive development, standardisation, possible ground work within EU research programme
7	Develop standard for long distance electronic ticketing in TAP TSI to allow	Evaluation of willingness of long distance operators to pay for the extra cost for enabling standard long distance ticket	EU contractual task as part of standards development, work of standards committees,

Recommendation		Identified research / study need	Possible <u>existing</u> financing tools for implementation
	compatibility with local fare management systems	with e-ticket recognition equipment recognition. Possibly pilot project for commercial case.	ERA funding
8	Create common quality standards for interchanges	Create common and Europe-wide standards for the equipment of interchanges (focussing on interchanges which are important for long distance passenger travel).	EU research programme, EU contractual task as part of standards development, IEE STEER or INTERREG C
9	Develop and establish city assessment tool and label for long distance intermodality	Creating a common methodology for benchmarking and a European information system to collect data from each city involved.	EU research programme, IEE STEER or INTERREG or national research task
10	Elaborate and establish new business models for effective interchange management	Development of a draft business model (different alternatives). Test of business models in practice.	EU, national research programmes
11	Develop a toolkit for a good design of an interchange	Development of interactive and web-based standard toolkit by Working Group of experts.	EU research programme, IEE STEER or INTERREG C, national programmes
12	Develop integrated airport accessibility plans	Definition of integrated airport accessibility plans for all airports, to encourage smoother intermodal links between air travel and surface access to the airports and between the various modes for land access to the airport.	EU contractual task as part of directive development
13	Foster intermodal business plans	Recommendation 13.1: Development of a suitable framework methodology for the quantification and monetary assessment of intermodality impacts for business plans in the field of passenger intermodality. Recommendation 13.2: Elaboration of EU standard arrangement for flexible profit sharing.	EU research programme, national research programmes
14	Establish common "CityFlex pass" concept	CityFlex pass is a common concept of service provision within an integrated ticket for local transport services specifically designed for the long distance traveller.	EU research programme, INTERREG B or national / regional programmes, Vasco da Gama
15	Develop innovative local taxi services	Shared taxis well integrated into the public transport, especially long distance interchange hubs.	EU research programme, INTERREG B or national / regional programmes, Vasco da Gama
16	Integrate cooperation and information platforms into a mobility centre for the mobility management of large events	Creation of ICT tools to support the mobility centres and to provide tailor-made travel advice and information, possibly updated throughout the entire journey.	National research task, national programmes, INTERREG B, EU research programme, Vasco da Gama

Recommendation		Identified research / study need	Possible <u>existing</u> financing tools for implementation
		Development of marketing-based combined travel products, tailored to event target groups.	
17	Provide early information to travellers about airport links and accessibility	The information should be on the flight, on public transport options and on accessibility at the destination airport	EU research programme, INTERREG B or national / regional programmes, Vasco da Gama
18	Create push & pull strategy on business trips	An important lever to create supporting framework conditions is taxation for (company) cars and reimbursement rules for (private) car use for business trips. Complementary development of intermodal transport service offers by enlarging the approach of mobility management to long distances	EU contractual task or national / regional programmes
19	Foster training and education on passenger intermodality	Development of training contents. Pilot project to develop standardised training and educational elements. Seed funding for research in passenger intermodality.	EU or national contractual or research task, IEE STEER, INTERREG C, Vasco da Gama

4.6.2 Specific short-term funding opportunities to pursue the LINK recommendations, and other networking opportunities

As is described in chapter 2.4.3, a feasible financing model seems to be in possible usage of funding sources of the IEE programme within funding area of STEER (Energy-efficient transport) in short term period (2-3 years) or INTERREG.

IEE STEER is not an ideal option though as the next call for 2010 is according to set up priorities focused on urban transport and this covers at best only part of the LINK agenda. There is unknown how the priorities of this programme will look like in the next year. At best it would involve only some of the main LINK stakeholders to address the urban transport areas of the LINK agenda without an obvious place for ministries for example.

The various INTERREG programmes offer an opportunity to gain funding for inter-city, inter-regional and inter-national pilot projects and co-ordination, although again it is not possible that any one project could cover the whole LINK agenda and geographic coverage.

An anticipated call of FP7 in July 2010 may contain possibilities to pursue some of the LINK recommendations.

IEE-STEER proposal

In the upcoming call in the April of 2010 with deadline for bids in June, the only relevant priority is for urban transport, so the focus of any work would have to be closer to interchanges and the urban mile if it is to overlap with the LINK agenda.

The most relevant call priority is the following one for energy efficient transport:

- Promote, based upon common approaches, the auditing & certification of integrated urban mobility policies and plans, including Europe-wide information exchange to share experiences and best practices.

With regards to this it seems that it may be possible to pursue the development of several LINK recommendations with a strong urban dimension with a selection from or combination of

- Developing a toolkit for a good design of an interchange,
- Create common quality standards for interchanges,
- Create a city assessment tool and label (to assess how well it connects the last urban mile into long distance networks).

This would be achieved through the partnership of a number of cities including detailed best practice mapping with mutual site visits within a structure of working groups. The emphasis on the last urban mile of long distance trips would not be eliminated but would be relaxed to include all of the needs of urban transport areas (interchanges are not just about long distance trips in any case).

LINK could build on the existing LINK stakeholder pool which includes a number of cities including POLIS members (with the advantage that the pool is already created).

Key to a successful bid would be proof of impacts on energy use and modal split.

EC contribution max. EUR 1.4 Mio. could be realistic.

INTERREG IV B

The *trans-national* programme (*INTERREG IV B*) would be ideal for developing some of the LINK inter-regional project ideas as pilot projects within interregional partnerships including cities and regions. Priorities and timing of calls of trans-national programmes vary from region to region.

LINK project ideas addressed might include regional intermodal travel planners, the CityFlex pass described in the LINK recommendations and other intermodal, international ticketing products.

Currently within the call announced on 12th of March 2010, the INTERREG IVB Programme for North West Europe invites applications for Strategic Initiative projects could fund a whole range of LINK pilot projects.

The call is open until the 9th April 2010 which is very tight time-scale to prepare any proposal but it gives clear view on what topics can be potentially called in future. Given this timing and the lack of a pre-prepared project, we consider it unlikely that a project proposal is realistic at this stage, but is likely for future calls.

INTERREG IV C

Regional Initiatives in Interregional INTERREG IV C could involve projects initiated by actors at the regional and local level aiming at exchange of experiences in a specific policy field and the development of new tools and approaches to policy.

The same LINK ideas and methods as have been proposed for a STEER proposal could be addressed given appropriate call priorities under priority 2 “environment and risk prevention” subtheme “energy and sustainable transport” and possibly in priority 1 “Innovation and the knowledge economy” subtheme ICT (in particular “promoting the use of new information and communication technologies by businesses, public services and the general public”), intermodal information and ticketing services promoted by LINK could be addressed.

No calls for regional initiatives are currently open, the current call at the start of 2010 addresses only capitalisation projects.

FP7 (EU research) proposal

In the upcoming call in the July 2010 in priority *TPT.2011.2-1 "Integration of passenger transport modes and travel information services through the analysis of social behaviour mobility patterns and*

business models as basis for the decarbonisation of the European transport system", opportunities may arise to further develop a number of the LINK recommendations and conduct policy and market research.

Action: *No immediate interest in STEER bid leadership was found among the members of the LINK consortium or others present at the LINK strategy workshop, however it was considered a good idea by many who might join such a bid. POLIS has indicated that this could be interesting for their city members. Further discussions amongst possible leaders of such a bid are on-going.*

Action: *LINK partners communicate with LINK stakeholders and monitoring opportunities for use of the INTERREG programme to pursue the LINK agenda at this regional cooperation level.*

Action: *LINK partners communicate amongst themselves with LINK stakeholders and analysing opportunities within the FP7 SST 4th call in July 2010. TPT.2011.2-1.*

Action: *The existing LINK partners and stakeholders generally examine options to pursue recommendations within the funding programmes described above.*

Annex 1: D38 Draft medium term Forum strategy consultation results

The draft strategy was published as Deliverable D38 and then was consulted with interested experts and bodies via email, on the final PAB meeting and on the final conference.

This consultation brought many interesting and valuable inputs for improvement and comments on the draft strategy. Generally respondents thought the strategy is well defined and only some details should be clarified precisely. In the following paragraphs the major conclusions of the consultation are summarised.

- The draft of work programme 2011 in FP7 Cooperation propose for the next call topic related to passenger intermodality concretely: TPT.2011.2-1 “Integration of passenger transport modes and travel information services through the analysis of social behaviour mobility patterns and business models as basis for the decarbonisation of the European transport system”. The content of such a Coordination / Support Action would make it possible to:
 - federate, coordinate or feed various initiatives such as the Watford Group⁵ or the Intermodes yearly conference;
 - to get inside some relevant structures such as the UITP Transport and Urban Life Commission, the UITP Regional Rail Commission, the Civitas Initiative, ...
 - make the best use of the NFPs network created for the LINK project, either as individual partners or globally as a Users Group in the new project.
- The members of EU-SPIRIT could imagine to continue the working groups on a voluntary level. So e.g. one workshop per year where the WG meets for an exchange about a certain topic could be possible or realistic from the point of view. For such a workshop a certain payment would be appropriate - as one has to pay something for the participation in a commercial conference. But there should be a clear idea behind since there are already several different groups and conferences and regional entities always have to act economical. EU-SPIRIT group could act as one core-group for an annual or continuous exchange about intermodality in information. Besides the internal working meetings between the EU-SPIRIT providers one yearly workshop or event which is more open and is integrating LINK partners or specialists from the WGs.
- The European Intermodal Association (EIA) is open to discuss any form of cooperation to streamline efforts while saving budget at the same time, which would fit in LINK+ strategy option: “Transferring parts of the LINK agenda to existing projects and platforms with a broader remit”. EIA offered help in the form of physical aid (LINK should have its own small office at EIA, usage of EIA meeting room, sharing secretarial assistance), or via EU funded projects while having EIA as partner.
- The passenger intermodality was indicated (during the last Marco Polo committee) as one of the political priorities for Marco Polo III to be analysed. As the objective of Marco Polo is to move or avoid the freight traffic from the road, Vasco da Gama should probably have a similar vision: invite people to use public transport on long distance travel and not their private cars.

⁵ The Watford Group is an international voluntary association of architects, designers and other design professionals coming from railway-related companies and administrations, created in 1963. As an occasion for exchange and discussion between its members, the Watford Group holds an annual general assembly, the Watford Conference.

The creation of „Vasco da Gama” programme seems to be a good idea, but before any decision some analysis must be done:

- analysis of the interest of the EU member states
- analysis of the interest of undertakings and public authorities (if they are involved – in Marco Polo only the undertakings can participate actually)
- analysis of potential areas of financing (types of projects – as mentioned in LINK recommendations), the findings of LINK project could help to set the criteria
- analysis of the profitability of such projects

The LINK is concentrated on long distance travel – but the first/last “urban mile” and the interchanges are also important. It would be useful to see it in the context of the Communication/ Action Plan on Urban Mobility (COM 2009-490) from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions. Actually the working group works on the Council’s conclusions to this communication. Maybe some issues of passenger intermodality could be included in urban mobility plans mentioned in this document.

As the work on Marco Polo III regulation will start probably in 2011 (the regulation must enter into force before 2014) any analysis/consultations should start soon.

- The importance of a certain "international bottom-up" process should be underlined. Real long distance intermodality is a nice problem but for the regional players a problem of limited relevance. This traffic is under 1% of the whole volume - the most important cross-border traffic is usually the regional traffic across the next border. That means: If there is a relevant demand for international intermodality on a more or less regional level than there is as a base for international cooperation and work for regional players. Nevertheless regional or long distance international intermodality has to deal with the local or regional interchange points - in so far there is a strong need for the local and regional players (like authorities or infrastructure operators) to care about this more infrastructure related topics and to be involved so far.