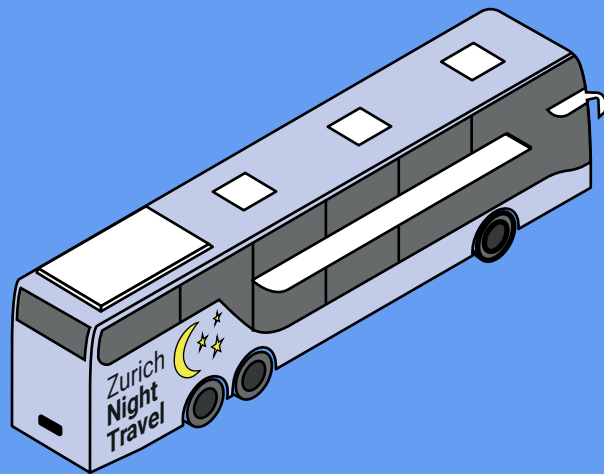


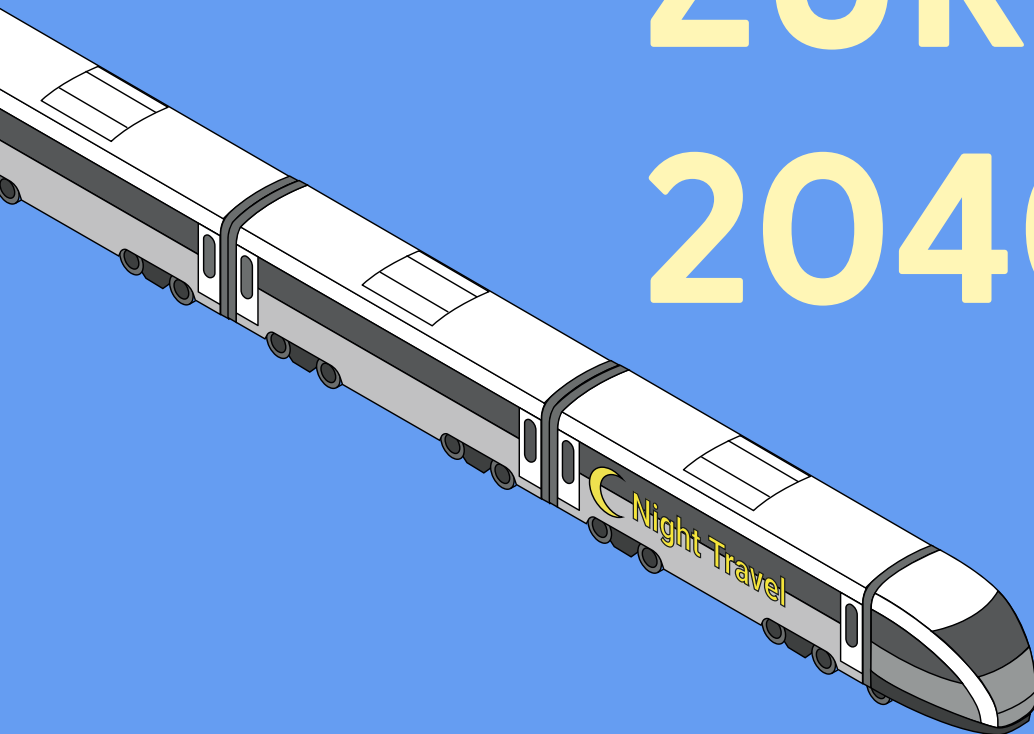
NIGHT TRAVEL



A study of future
developments

'Night Travel Zurich 2040' is a joint project of the City of Zurich's Environment and Health Protection Department and Zurich Tourism.

ZURICH 2040



IMPRINT

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NIGHT TRAVEL ZÜRICH 2040

A study of future developments

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This study would not have been possible without the valuable contributions of numerous experts

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‘Night travel offers enormous potential for Zurich as a tourist destination. It opens up new target groups and creates space for innovative travel experiences. Night bus and night train connections are a key component of a well-connected destination, ensuring that Zurich remains popular with travellers.’

Thomas Wüthrich

‘International travel still accounts for a huge proportion of our carbon footprint. As a city, we want to promote innovations such as KlimUp that massively reduce this footprint. Night travel is one building block. We want to work with innovative providers and other European cities to establish a night travel network.’

René Estermann

NIGHT TRAVEL ZURICH 2040

A STUDY OF FUTURE DEVELOPMENTS

René Estermann
**Director of the Zurich Environment
and Health Protection Department**

International travel still accounts for a huge proportion of our carbon footprint. As a city, we have set ourselves ambitious climate targets and are actively seeking innovations that will reduce our impact on the environment.

Night travel is an important component of this strategy. This study is more than a concept paper – it is a call for action. The challenges posed by the climate crisis require bold steps and new alliances. By working together with other European cities, innovative providers, and committed citizens, we can establish a night travel network that is not only ecologically sound, but also offers economic and social benefits.

We are at a turning point where visions can become reality. This study shows that night travel is not just a means of transport, but a key to a more sustainable and connected Europe – with Zurich as its central hub. Together, we can make night travel a success and thus make an important contribution to a climate-friendly future.

Thomas Wüthrich
Director of Zurich Tourism

The future of travel is not up in the air – it's on rail and road. As a tourist destination, Zurich strives to be not only a destination, but also a starting point for sustainable travel in Europe.

Night travel offers enormous potential for our city – it opens up new target groups and creates space for innovative travel experiences. Our central location in the heart of Europe makes us the ideal hub for a modern night travel network.

We do not only want to present visions, but also take concrete steps to position Zurich as a pioneer in the field of night train and night bus transport. By combining our traditional strengths in tourism with forward-looking mobility concepts, we are creating a unique selling point for our destination. Zurich can be a hub where travellers from all over the world arrive to discover Europe in a sustainable way.

02 FACTS & FIGURES

62%

BETWEEN DESIRE, PRAGMATISM AND CLIMATE IMPACT

High acceptance of night travel

Travelling by night train still requires a healthy dose of pragmatism. From booking to arrival, things don't always run smoothly. But change is noticeable: innovative start-ups are presenting new vehicle concepts and service ideas that promise a significantly improved user experience. Acceptance among the population is already impressively high.

Prof. Dr. Sauter-Servaes explains: 'We know from every survey that there is a difference between people liking night trains and actually using them. Experts call this the attitude-behaviour gap. However, the latest surveys show enormous approval for night travel, despite the current quality of service: 62% of Swiss people say they would like to travel by night train. That is a huge potential.'

The night train is experiencing a renaissance. The combination of

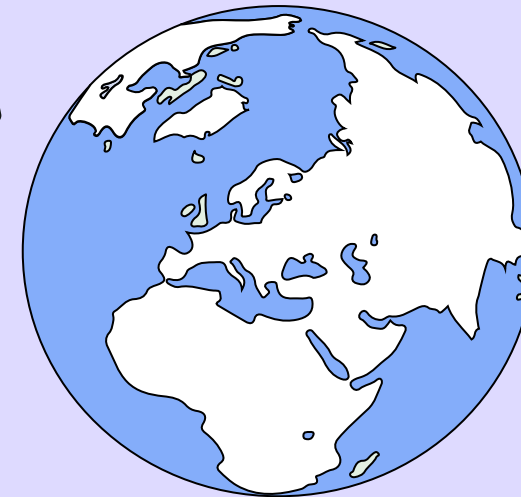
comfortable night travel and a low carbon footprint makes it very attractive. The climate benefit is a key argument.

Admittedly, a comprehensive comparison of the carbon consumption of different modes of transport is complex – there are too many parameters such as electricity generation, distance and capacity utilisation.

As a benchmark, it can be said that the carbon footprint of night buses and night trains is about 10 to 20 times smaller than that of airplanes.

HOW MUCH WILL TOURISM IN EUROPE GROW BY 2035?

The market will grow, we need different ways to get around.



+40%

growth in international arrivals in Europe by 2035

Forecast until 2035: Source: Oxford Economics, as of June 2025; excluding domestic tourism within the travellers' own country



'We expect continued strong growth in tourism. In order to manage this increase, we are also focusing on night trains and night buses.'

Thomas Wüthrich

02 FACTS & FIGURES

RANGE OF NIGHT TRAVEL

Destinations in Europe that can be reached within 10 hours by night travel



‘In addition to a massive expansion of European daytime public transport connections, night travel is one of the most important ways to achieve climate targets. We see this as a crucial opportunity not only for the city of Zurich, but for the whole of Switzerland and Europe.’

René Estermann

DESTINATION DEVELOPMENT AND NEW TRAVEL PATTERNS

Night travel connects Europe

Large parts of Europe would be reachable from Zurich by night travel. But accessibility is only part of the story. Prof. Dr. Sauter-Servaes explains: ‘What we are currently experiencing is possibly the beginning of a reorganisation of European travel patterns.’ Zurich’s central location opens up new opportunities for business tourism.

In the morning, the city can welcome business travellers from all over Europe, who start their appointments well rested. In the evening, they board the night train again and are back at their home office the next morning.

More and more Swiss companies are adapting their policies to this trend and encouraging their employees to use trains and night trains for business travel. Local authorities are also changing their travel policies. For example, the city of Zurich

determines that trains must be used for business trips of up to 8 hours. If a night train is available, this increases to 16 hours. This is not just political posturing – companies and local authorities have recognised that their employees can use their travel time productively or to relax.


This opens up new destinations: travellers flying to Zurich can continue their journey by night bus or night train, for example, to Tuscany or other regions, such as Sardinia, which can be reached by ferry.

02 FACTS & FIGURES

RETHINKING CAPACITY

Comparison of current night train capacity with future concepts


Austrian Federal Railways (ÖBB) Nightjet – New Generation

 **254 passengers**
200 m train length



- 1 carriage = 72 seats
- 1 multifunctional carriage = 22 seats
- 28 three-berth couchette carriages with mini cabins = 84 berths
- 3 couchette compartments = 36 berths
- 2 sleeping carriages = 40 berths


Austrian Federal Railways (ÖBB) Nightjet – New Generation Double

 **508 passengers**
400 m train length



- 2 carriages = 144 seats
- 2 multi-purpose carriages = 44 seats
- 56 three-berth couchette carriages with mini cabins = 168 berths
- 6 couchette compartments = 72 berths
- 4 sleeping carriages = 80 berths

Austrian Federal Railways (ÖBB) Nightjet – New Generation Jumbo

 **712 passengers**
740 m train length




- 2 sleeping cars = 40 berths
- 24 minicabin cars = 672 berths

LunaRail – Basic Concept

 **376 passengers**
200 m train length

- 2 HotelPod carriages = 76 berths
- 5 SeatPod carriages = 300 seats

LunaRail – Double concept

 **752 passengers**
400 m train length

- 4 HotelPod carriages = 152 berths
- 10 SeatPod carriages = 600 seats

LunaRail – Jumbo concept

 **1.516 passengers**
740 m train length

- 2 HotelPod carriages = 76 berths
- 24 SeatPod carriages = 1,440 seats



INNOVATION HAS NOT YET REACHED ITS FULL POTENTIAL

Innovation on the night train

Today's night trains can accommodate around 250 people – but their potential is far from exhausted.

With the growing interest in night travel, innovative companies are developing new carriage and operator concepts. They show impressively how leaps in capacity and comfort are possible. Prof. Dr. Sauter-Servaes comments: 'The current Austrian Federal Railways (ÖBB) Nightjet can carry 254 passengers in a 200-metre-long train.'

By implementing an innovative concept such as that presented by LunaRail, we can accommodate 376 passengers in a train of the same length.' But the possibilities go much further. If the train is twice the length, 752 passengers could be carried. A jumbo concept that fully utilises the

maximum train length of 740 metres determined by infrastructure restrictions would even offer space for over 1,500 passengers. This capacity could theoretically transport 75% of the daily air passengers between Berlin and Zurich in a single train.

The technical innovation for these jumbo concepts lies in intelligent train splitting: the train would be split before reaching the destination station in order to make optimum use of the limited platform length.

These solutions are not a pipe dream – they are technically feasible and are waiting to be implemented. A joint effort by all stakeholders, new carriage equipment, innovative services and intelligent operator concepts are needed. The foundations are in place; now it's time to put the plans into action.

02 FACTS & FIGURES

THE INNOVATIVE NIGHT BUS

Quickly scalable and versatile

In addition to night trains, night buses also have immense capacity potential. Prof. Sauter-Servaes explains:

‘Depending on the concept, a night bus can have up to 21 seats/berths, as seen in the concept developed by Swiss start-up Twiliner. We would need around 78 of these buses to match the capacity of a jumbo night train. That may sound like a lot at first, but in terms of daily traffic volume, it’s almost nothing. What’s more, night buses have two important advantages over night trains. They can serve destinations for which there is insufficient demand for a night train connection and a large and very efficient bus industry already exists. This means that we could build a large number of night buses very quickly thanks to existing production capacities.’

The night bus is still a young concept in Europe, but one with enormous potential. While night buses have long been established in other parts

of the world, Europe is only just discovering this form of travel. Night buses cost around CHF 750,000 per vehicle, which makes them significantly cheaper than railway rolling stock.

Their flexibility makes them particularly attractive: they can be deployed immediately because they don’t need track time, they can easily adapt to seasonal fluctuations, and they can access smaller destinations.

Night trains and night buses complement each other perfectly: trains efficiently connect the major centres on the main routes, while buses cover the surrounding areas and assure more calibrated distribution. Together, they can form a dense night travel network that reconnects Europe – sustainably, comfortably and accessible to everyone.

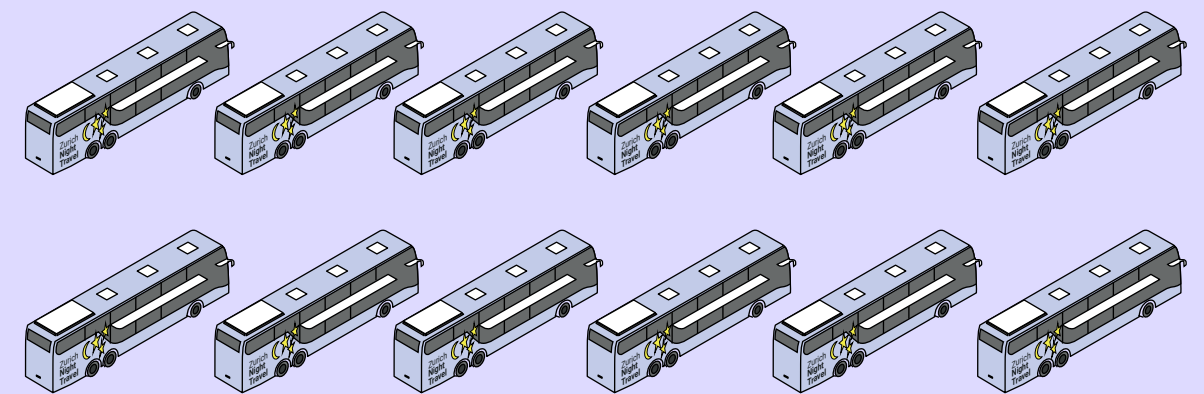
COMPARISON OF NIGHT BUS AND NIGHT TRAIN CAPACITIES

Comparison based on Twiliner & Austrian Federal Railways (ÖBB) Nightjet

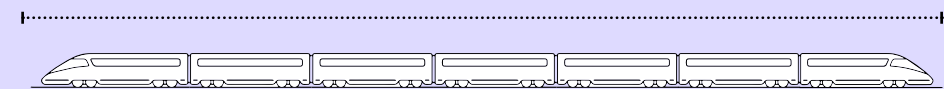
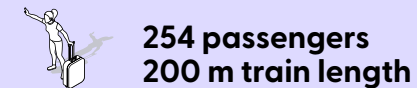
Night bus concept – Twiliner



12 night buses, each with 21 seats/berths



Austrian Federal Railways (ÖBB) Nightjet – new generation



- 1 carriage = 72 seats
- 1 multifunctional carriage = 22 seats
- 28 three-berth couchette carriages with mini cabins = 84 berths
- 3 couchette compartments = 36 berths
- 2 sleeping carriages = 40 berths

03 OVERVIEW

THE MOST IMPORTANT POINTS AT A GLANCE

'Night Travel Zurich 2040' examines the potential of night travel – using night trains and night buses for distances of up to 1,500 km, focusing not only on the means of transport themselves, but also on a comprehensive service ecosystem, involving luggage logistics, connecting services and digital integration.

As a joint project of the City of Zurich's Environment and Health Protection Department and Zurich Tourism, the study aims to establish Zurich as a central hub in a Europe-wide night travel network, thereby achieving climate goals and increasing the city's appeal to tourists.

The scenario methodology enables an emotional approach to a successful future in 2040, in which night travel has become a natural part of the European mobility system – as told through the fictional story of Brazilian journalist Carla Rodriguez, who travels around Europe at night.

This narrative approach makes the complex interplay of social, political, economic and technical developments understandable and converts abstract visions of the future into specific, everyday situations which clearly show the advantages of night travel.

'A joint project of the City of Zurich's Environment and Health Protection Department and Zurich Tourism - this study aims to establish Zurich as a central hub in a Europe-wide night travel network.'

'For Zurich as a tourist destination, night travel offers enormous potential. It can open up new target groups and create space for innovative travel experiences. Its central location in the heart of Europe makes Zurich the ideal hub for a modern night travel network.'

The study is based on a multi-stage process involving 48 experts from the fields of tourism, mobility, sustainability, politics and placemaking, whose knowledge and visions in surveys and workshops formed the basis for feasible and desirable future approaches.

Night travel can contribute to achieving the city's climate goals. Zurich can play an active and driving role through targeted initiatives and new alliances with other European cities. This study formulates ten strategic potentials which show how the vision of successful night travel can

become reality.

This study formulates ten strategic potentials which show how the vision of successful night travel can become reality.

As a basis for further discussion and activities, this study is aimed at decision-makers in politics, administration and business, as well as the interested public. In addition to creative impulses, it offers specific recommendations for action to promote and establish night travel as a sustainable travel concept.

04 THE STUDY

‘Our goal is to develop a narrative that shows how Zurich can become a central hub in a Europe-wide night travel network by 2040.’

BACKGROUND INFORMATION

Objective

‘Night Travel Zurich 2040’ is a joint project of the City of Zurich’s Environment and Health Protection Department and Zurich Tourism.

At a time when climate change and sustainability are key social challenges, this study examines the potential of night travel, i.e. utilising night trains and night buses for distances of up to 1,500 km.

A comprehensive strategic potential analysis was therefore carried out as part of the project. This analysis identifies opportunities for Zurich to become a central hub in a Europe-wide night travel network by 2040. The key recommendations and ideas from this process have been incorporated into this narrative as ‘strategic potentials’.

These potentials outline various development perspectives and provide

creative impulses for further discussion on the subject of night travel. They are intended as a contribution to the discourse on sustainable mobility and tourism development.

Methodology

This study is based on a multi-stage scenario process that was carried out between autumn 2024 and summer 2025.

At first, influencing factors for night travel were identified and condensed into key factors. Four possible future scenarios were then developed for each key factor. These were then evaluated in a survey of 48 experts from the fields of tourism, mobility, sustainability, politics and placemaking – both in terms of their positive impact on the success of night travel and their feasibility. The results were discussed with the experts in a design sprint

in April 2025 and converted into concrete measures. Based on these findings, a forward-looking scenario was developed that outlines a vision for night travel in 2040. In addition, a catalogue of ten strategic potentials was compiled, the implementation of which can support the success of night travel.

Stakeholders

The City of Zurich’s Environment and Health Protection Department is the municipal authority which coordinates the implementation of the City of Zurich’s climate targets. Night travel was identified as a strategic project to reduce CO₂ emissions in the transport sector and to position Zurich as a pioneer in sustainable mobility.

Zurich Tourism, as a destination development and management organisation, sees night travel as an opportunity to increase the city’s appeal as a travel destination while attracting new target groups. Night travel is an ideal way to position Zurich as a sustainable, well-connected and innovative destination in the heart of Europe.

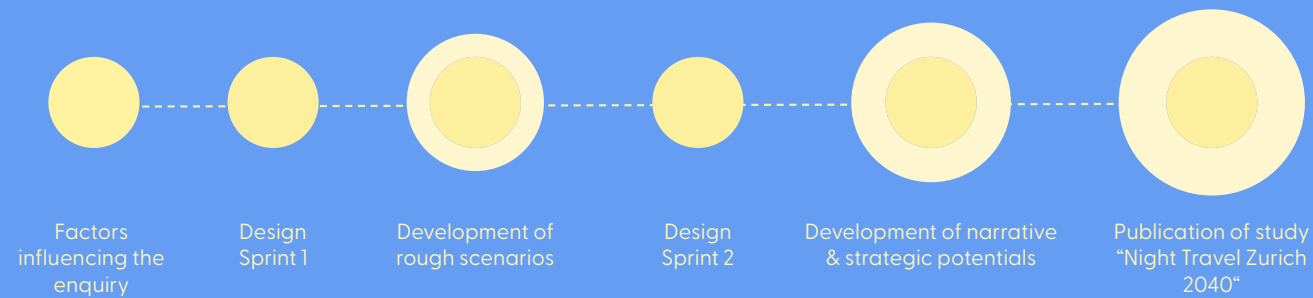
The network of experts: The study benefited from the knowledge and perspectives of numerous experts from various fields. Their contributions in surveys and workshops were crucial in identifying feasible and desirable future approaches for night travel.

Use of this study

This study is aimed at decision-makers in politics, administration and business, but also at the interested public. It not only provides creative impulses, but also offers concrete recommendations how night travel can be promoted and established as a sustainable travel concept. This study is intended to serve as a basis for further discussion and activities and invites all relevant stakeholders to participate in shaping a sustainable mobility future.

‘This study is aimed at decision-makers in politics, administration and business, but also at the interested public. It not only provides creative impulses, but also offers specific recommendations how night travel can be promoted and established as a sustainable travel concept.’

05 THE PROCESS



OVERVIEW OF THE PROCESS STAGES

Phase 1: Laying the foundations From idea to analysis

Through creative workshops, the project team collated numerous influencing factors that could shape night travel by 2040. The result was a comprehensive map of possible developments and influencing factors for sustainable night travel in Europe.

Phase 2: Focusing on key factors From the big picture to the essentials

The project team and the experts identified the decisive key factors from the multitude of influencing factors. These were structured and categorised in order to focus on the most important fields of action.

Phase 3: Developing strategic options Opening up future scenarios

The project team developed several alternative future projections for each key factor. These were collated in a range of options that highlighted the diversity of possible development paths.

Phase 4: Expert dialogue Combining knowledge and visions

In a comprehensive online survey, experts from the fields of tourism, mobility, sustainability and politics evaluated the future projections. The results were incorporated into a design sprint, which produced the first scenarios and visions of the future for Night Travel 2040.

Phase 5: Deriving measures From vision to implementation

In the form of a design sprint, the project team worked with experts to develop strategic potential and concrete measures to turn a desirable scenario into reality. The result was ten strategic potentials for Zurich.

Phase 6: Developing narratives Making the future tangible

Using all the insights gathered, the project team developed a narrative that vividly conveys the vision of Night Travel Zurich 2040. The story of Brazilian journalist Carla Rodriguez, who travels through Europe at night, makes the strategic potential tangible and emotionally accessible.

Phase 7: Publication Initiating dialogue and providing impetus

Following the publication of this study in July 2025, the project team provides impetus for European discussion on night travel. This study forms the starting point for the discussion of the potential identified and invites all relevant stakeholders to actively participate.

‘The story of Brazilian journalist Carla Rodriguez, who travels through Europe at night, makes the strategic potential tangible and emotionally accessible.’

05 STRATEGIC POTENTIAL

„One result of the study is strategic potential. This was identified in a comprehensive analysis and shows how Zurich can become a central hub in a Europe-wide night travel network by 2040.“

-  **EUROPEAN CITY ALLIANCE:** Zurich joins forces with leading European cities to provide creative and financial impetus for high-quality night travel services.
-  **PILOT PROJECT FOR NIGHT BUS CONNECTIONS:** Zurich establishes a scalable service supplementary to night trains by initiating test projects on selected European routes.
-  **NIGHT TRAVEL START-UP CLUSTER:** Zurich will develop into a dynamic ecosystem for innovative founders in the field of comfortable and sustainable night travel.
-  **INVESTMENT FUND FOR NIGHT TRAVEL INNOVATIONS:** Zurich will become a centre of night travel innovations through targeted investments in new vehicle concepts, services and infrastructure solutions.

-  **THE DEVELOPMENT OF NIGHT TRAVEL DESTINATIONS:** Zurich will establish itself as the central hub of a European night travel network through systematic analysis and the development of attractive connections.
-  **NIGHT TRAVEL LIFESTYLE CAMPAIGN:** Zurich establishes night travel as an attractive and sustainable lifestyle experience through contemporary positioning and targeted communication.
-  **NIGHT TRAVEL IN GLOBAL TRAVEL CHAINS:** Zurich positions itself as a gateway for international guests from other continents who explore Europe using night travel.
-  **INTEGRATION OF NIGHT TRAVEL POSSIBILITIES INTO DIGITAL BOOKING PLATFORMS:** Zurich benefits from integrated digital platforms that make night travel possibilities comparable in terms of actual travel times, comfort levels and CO₂ balances.
-  **ADDITIONAL SERVICES FOR NIGHT TRAVEL:** Zurich creates a seamless travel experience through integrated additional services such as showers, luggage logistics and breakfast catering.
-  **ZURICH NIGHT BUS FLEET:** Zurich enables new connections with low investment risk by providing modern, comfortable night buses.

‘The strategic potentials offer creative impulses for further discussion on the subject of night travel.’

07 SCENARIO 2040

NIGHT TRAVEL THROUGH EUROPE

SCENARIO AND DETAILED STRATEGIC POTENTIALS

Understanding the scenario

The following chapter presents our vision for night travel in 2040 in the form of a narrative scenario. We have chosen this form of scientifically based storytelling to make the complex interrelationships of a successful future for night travel tangible.

The narrative fulfils several functions: it allows us to immerse ourselves in a possible future world and makes abstract developments tangible. Through the story of Brazilian journalist Carla Rodriguez and her digital assistant João, we translate scientific and technical contexts into comprehensible everyday experiences. This creates an emotional connection to a successful future in which night travel has become a natural part of the European mobility system.

The scenario-based presentation enables us to illustrate the complex interplay of social, political, economic and technical developments.

We can see how various factors influence and reinforce each other – from the European city alliance to innovative start-ups and new booking platforms.

Distributed throughout the travel reports, you will find strategic potentials that are intended to pave the way to this vision. They show the steps we need to take today to make the future a reality.¹

¹In developing this scenario, we have based our approach on established quality criteria for futurology. See Gerhold et al. (2017) „Standards and Quality Criteria for Futurology. A Pocket Guide for Practitioners and Students,“ edited by Lars Gerhold, Dirk Holtmannspötter, Christian Neuhaus, Elmar Schüll, Beate Schulz-Montag, Karlheinz Steinmüller, Axel Zweck, Berlin

NIGHT TRAVEL THROUGH EUROPE

By 2040, Europe has found a new and strong unity. Almost 520 million people live in a sustainable and technologically flourishing region. Europeans have understood the central historical role they can play in the era of global warming and climate resilience. Europe is so successful in this regard that it attracts the interest of journalists and scientists from all over the world. How has Europe adapted to global warming? What innovations have been implemented in the mobility economy, in logistics and tourism?

Brazilian journalist Carla Rodriguez, who works for the daily newspaper O Globo, has answered these questions for us. She specialises in foreign reporting with a particular focus on innovative transport systems.

In the summer of 2040, she is working on a major research project on the spirit of optimism in Europe. She is concentrating on the significance of the fundamental modernisation of the European transport system. A network of night trains and night buses now connects the people and regions of Europe in a cost-effective, sustainable and customer-friendly way.

Carla Rodriguez is accompanied on her journey by her digital helper, an AI avatar named João. He is her all-round personal digital assistant and is particularly helpful with research and organising her night travels.

Carla, 14 July 2040,
Zurich... So this will be the topic for João and me over the next few weeks: climate-adapted Europe. I will conduct interviews with transport and urban planners, politicians and scientists across Europe, focusing on the new transport system and otherwise enjoying this beautiful continent.

Before we start our journey here in Zurich through the new Europe, let's hear from João. I have given him the job of gathering all the information about the mobility system which is known today as the 'European Night Travel System'.

EUROPEAN TRAVEL CULTURE – DAY AND NIGHT

Research João, 14 July 2040

The Night Travel System is a highly integrated digital system of coordinated night train and sleeper bus connections that links the whole of Europe – from the North Cape to Gibraltar, from Kyiv to Galway, from Stockholm to Barcelona. Not only nighttime connections are coordinated with each other, they are also coordinated with daytime services.

For distances of up to 1,500 km, night trains and night buses are an ecological and comfortable alternative to intra-European air travel. And, due to their high level of attractiveness, much longer distances are also travelled using the Night Travel System.

The Night Travel System is always powered by renewable energy.

Night travel and the spirit of European progress

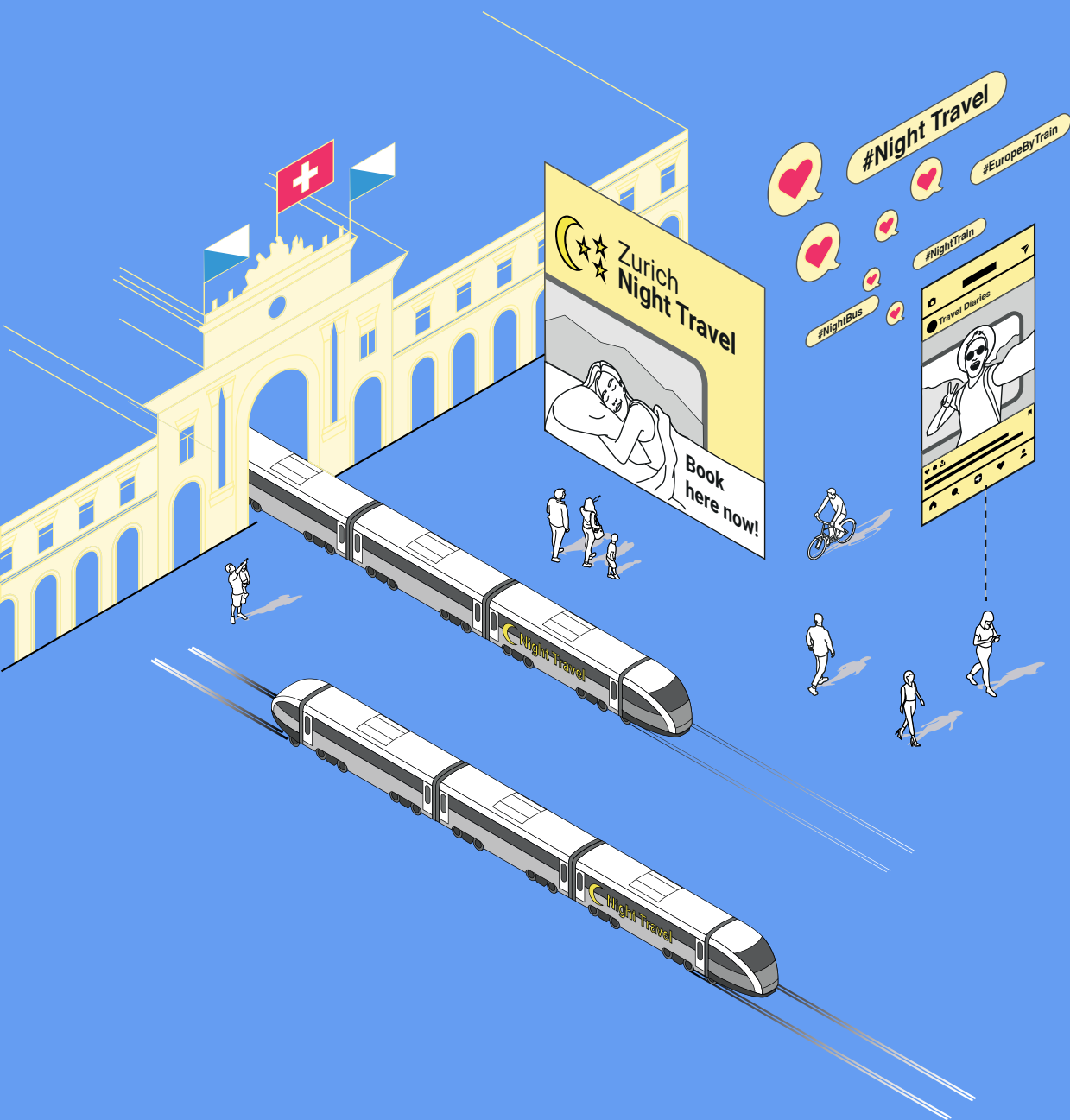
Night travel is not just a new transport option, but an expression of a new, overland travel culture. It combines digital modernity, sustainability and customer-oriented convenience with a growing desire for mindful travel experiences.

Mobility always reflects society. Night travel embodies the spirit of Europe's transition to a climate-resilient modernity, driven by an alliance of European cities – the 'Night Travel Alliance of Mayors'.

Europeans love their 'night travels'. Recently, numerous successful European Netflix productions have even used the night train as a plot element. It makes travel easy and affordable, competes successfully with air travel and cars, makes tourism green and has played an important role in re-establishing a common European identity.

NIGHT TRAVEL LIFESTYLE CAMPAIGN

NEW POSITIONING OF NIGHT TRAVEL AS AN ATTRACTIVE TOURIST EXPERIENCE



UNIFORM NIGHT TRAVEL DESIGN: RECOGNISABILITY IN THE EUROPEAN TRANSPORT NETWORK

The vehicles and infrastructure of Night Travel are characterised by a striking, uniform design. They are designed to be welcoming, and the visual identity extends to all points of contact: website, tickets, uniforms and the buildings of night travel hubs. All elements follow this common design concept.

It could be said that the vehicles are characterised by a versatile design in the form of themed carriages or entire themed trains: for example, a Western Express themed train, a 'Mare Nostrum' Express and many other such themed services.

A train can be supplemented with themed carriages which can be designed almost freely as long as they meet safety requirements. Night bus operators also use this principle and design themed vehicles.

STRATEGIC POTENTIAL: THE NIGHT TRAVEL LIFESTYLE CAMPAIGN

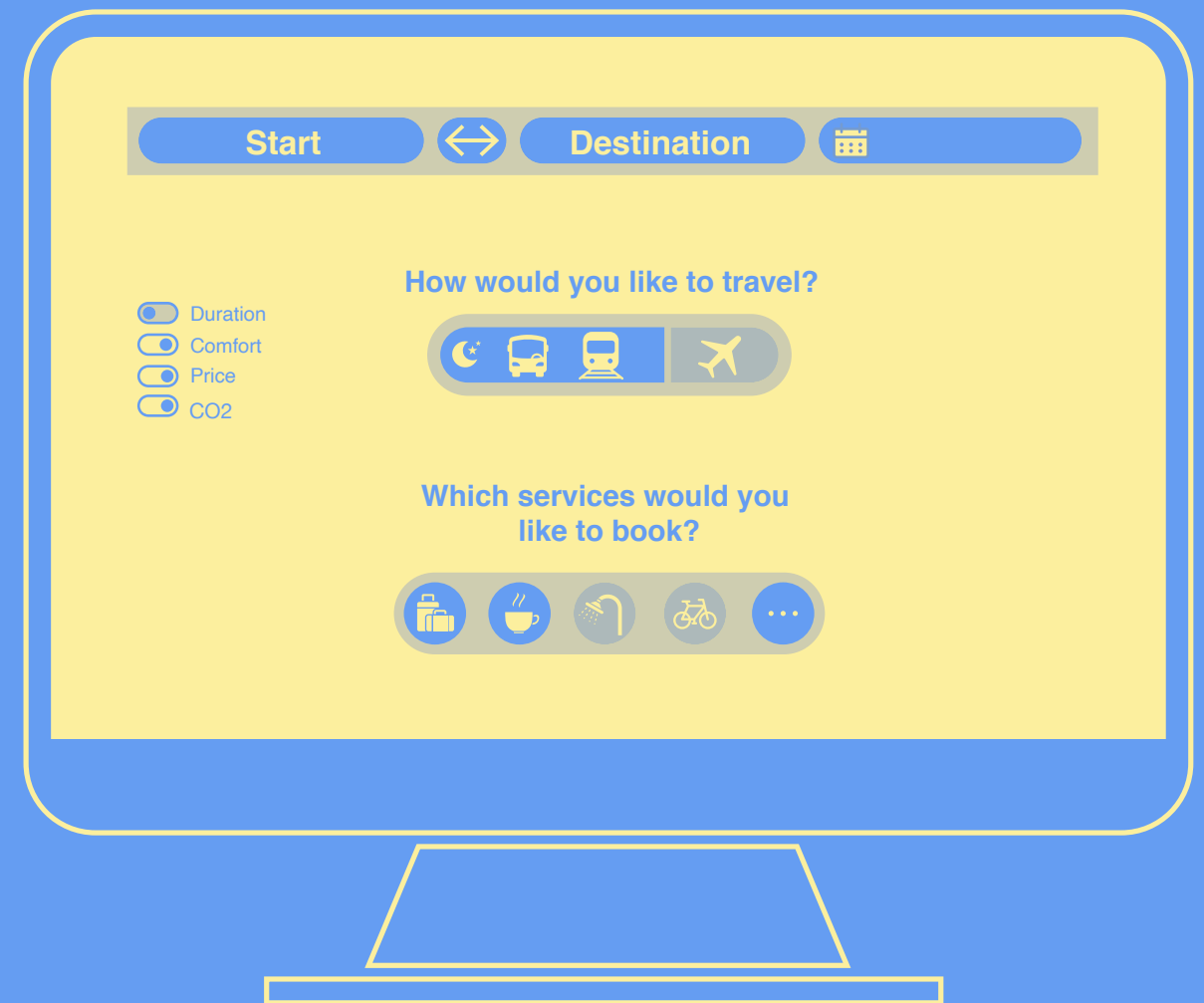
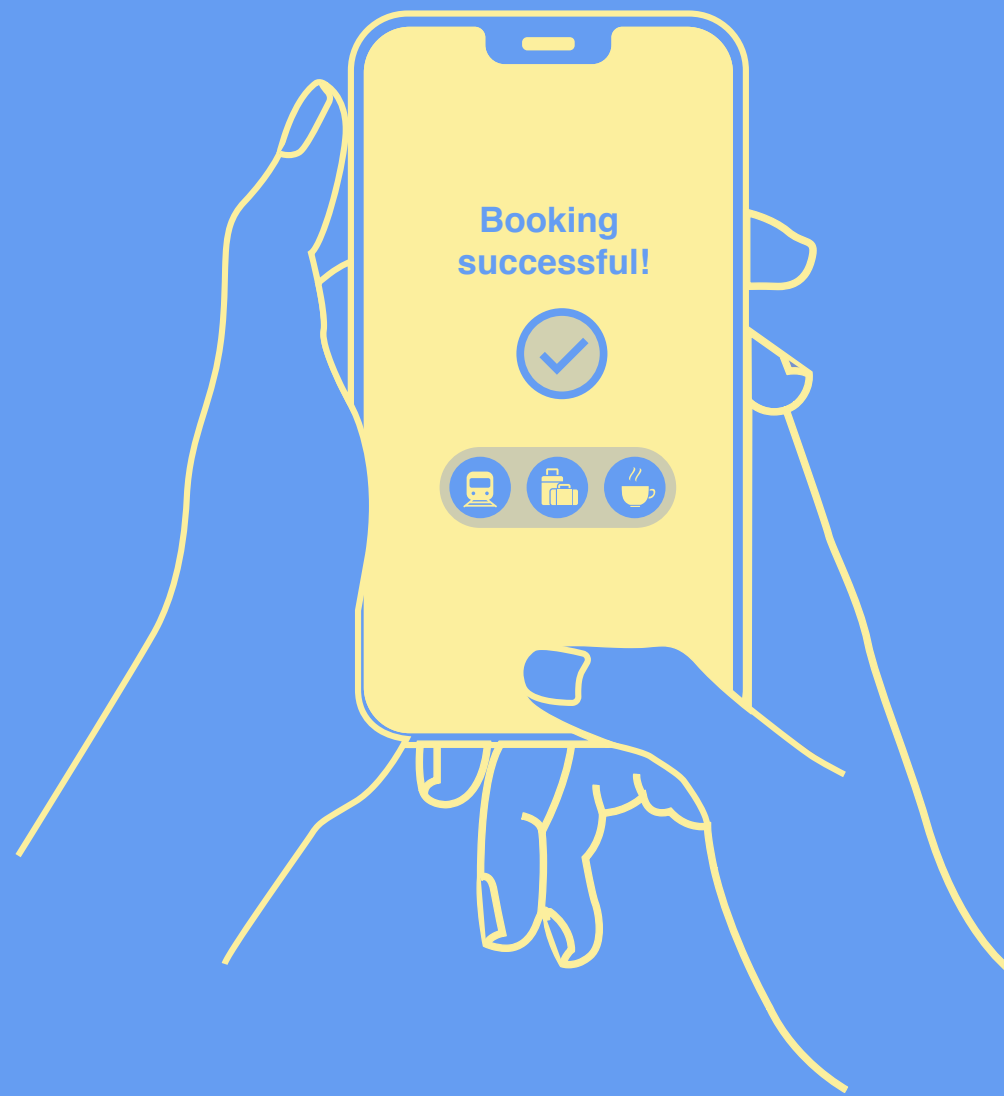
Establishing night travel as a new trend offers significant strategic potential. A lifestyle campaign shows how modern, relaxed and sustainable night travel is.

Night travel is positioning itself as an attractive travel experience through collaboration with tourism partners, travel influencers and city marketing.

Effective and coordinated communication creates a high level of recognition. Events, social media and experience reports help to make sustainable night travel an important statement.

INTEGRATION OF NIGHT TRAVEL POSSIBILITIES INTO DIGITAL BOOKING PLATFORMS

CREATION OF A SEAMLESS, DIGITAL ECOSYSTEM FOR BOOKING AND SERVICES



AI-CURATED MULTIMODALITY FOR A POSITIVE USER EXPERIENCE

The digitalised infrastructure and operating concept play a significant role in the return to overland transport. The most important innovation is the digital integration of the various national systems into a European ecosystem. The historical patchwork of national rail networks is now united by a virtual superstructure and linked to the road system.

The connections are perfectly coordinated digitally. Bus and train, road and rail merge into a hybrid entity of infrastructures, information flows and transport chains. Night trains and night buses meet high quality standards. The hardware is simple but comfortable, timeless and quiet, and the software is intuitive to use. Costs are low and prices competitive.

The success of night travel is also due to favourable regulatory conditions. As a form of sustainable mobility, night travel is exempt from CO₂ taxes. Adding to the innovative

strength of night travel providers regarding efficiency and competitiveness, the exemption from emissions trading reduces costs.

One focus of night train providers is service levels – i.e. hygiene standards, privacy, safety and sleep quality. These are high quality and are clearly communicated at the time of booking. Gone are the days when travellers did not know what kind of sleeping car compartment they would find.

In addition to competitive prices, the service thus meets travellers' expectations. New players have reinvented the night travel experience with expertise from other industries, such as hospitality and the automotive industry.

A strong user focus and innovative vehicle concepts and service offers are central. The main focus of product design is on mobility management and the travel experience, i.e. usability and design.

SIMPLY BOOK AND SET OFF: A MODEL OF DIGITAL INTEGRATION

A decisive factor in the success of night travel is the integration of all night travel connections into the major digital information and booking platforms.

This makes the night travel system more visible and enables it to develop into a widely accepted travel standard. The platforms not only compare prices, but also show door-to-door travel times, the comfort levels and CO₂ emissions of competing travel options at a glance. A special feature is the 'Sleep Quality Experience' rating, which gives travellers insight into the sleeping comfort. Another important factor is that the platforms do not only integrate night travel bookings, but also show all related services such as breakfast catering, luggage services and last-mile options.

In particular, the Europe-wide standardisation of digital travel booking has enabled a high level of user acceptance – even for spontaneous trips at short notice. This is because there is always high-quality capacity

available for last-minute travellers who want to go to another city overnight.

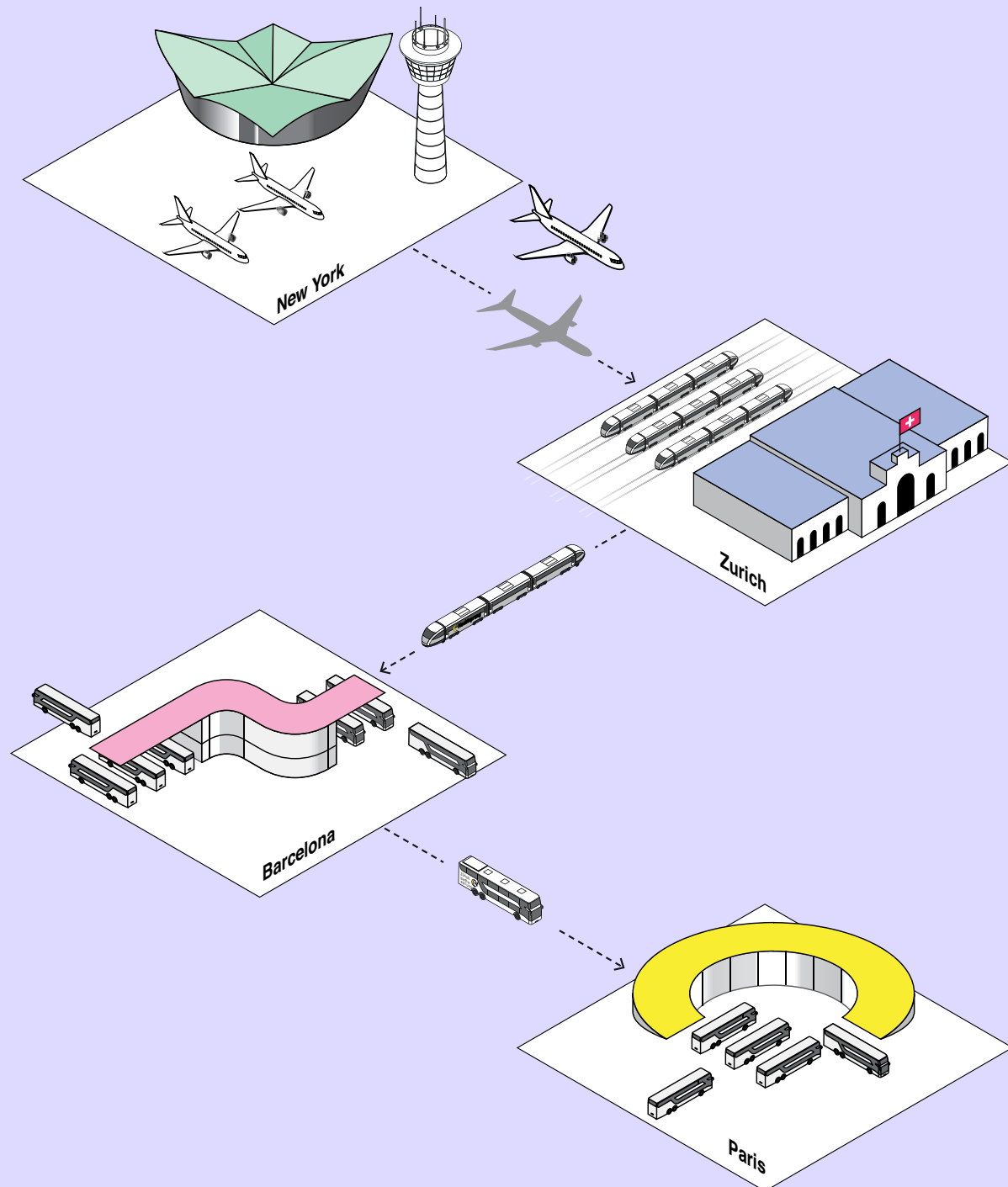
STRATEGIC POTENTIAL: INTEGRATION OF NIGHT TRAVEL INTO DIGITAL BOOKING PLATFORMS

Simplifying the booking of night travel opens up significant strategic potential. Night travel possibilities to and from Zurich are integrated into booking platforms as part of pilot projects that compare convenience and actual door-to-door travel times. This puts night travel on an equal footing with other travel options regarding the booking experience.

Users can see the duration, comfort, price and climate impact of each option at a glance. Linking night travel tickets with subsequent services such as breakfast catering or city transport promotes a digital ecosystem that makes night travel accessible, attractive and easy to book for everyone.

NIGHT TRAVEL IN GLOBAL TRAVEL NETWORKS

OFFERS FOR INTERNATIONAL OVERSEAS TOURISM



THE INTEGRATION OF LONG-DISTANCE MARKETS INTO THE NIGHT TRAVEL SYSTEM

Tourists from all over the world continue to fly to Europe. Once they have arrived, many tourists want to continue their journey by night train or night bus – not only because it is inexpensive and allows them to arrive in the city centre within a night, but also because it offers an attractive experience that is brought into focus by tourism marketing. Zurich Tourism was the pioneer in combining long-distance inbound travel to Europe with night travel and in marketing this as a combined package. Following Zurich's initial success, Berlin, Paris, Vienna and others adopted the idea of combining tourist air travel with night travel by train or bus. Today, many travellers come specifically to experience European night travel, which is considered a unique example of an interconnected transport system worldwide.

Focus on global youth – Tour d'Europe by night travel

The grand tour of Europe has always been an important biographical experience for young travellers from overseas. First it was young aristocrats from England, then high school graduates from the USA, and then young Asians. New night travel marketing builds on this tradition. Zurich's

tourism experts are particularly innovative, exploiting Switzerland's central location to create a major Tour d'Europe revival: fly to Zurich and back, and in between spend a few weeks travelling through Europe by night. From all-inclusive tours to customisable options, everything is possible. Appropriate capabilities have also been integrated into the night travel system for the Interrail's typically young clientele.

STRATEGIC POTENTIAL: NIGHT TRAVEL IN GLOBAL TRAVEL NETWORKS

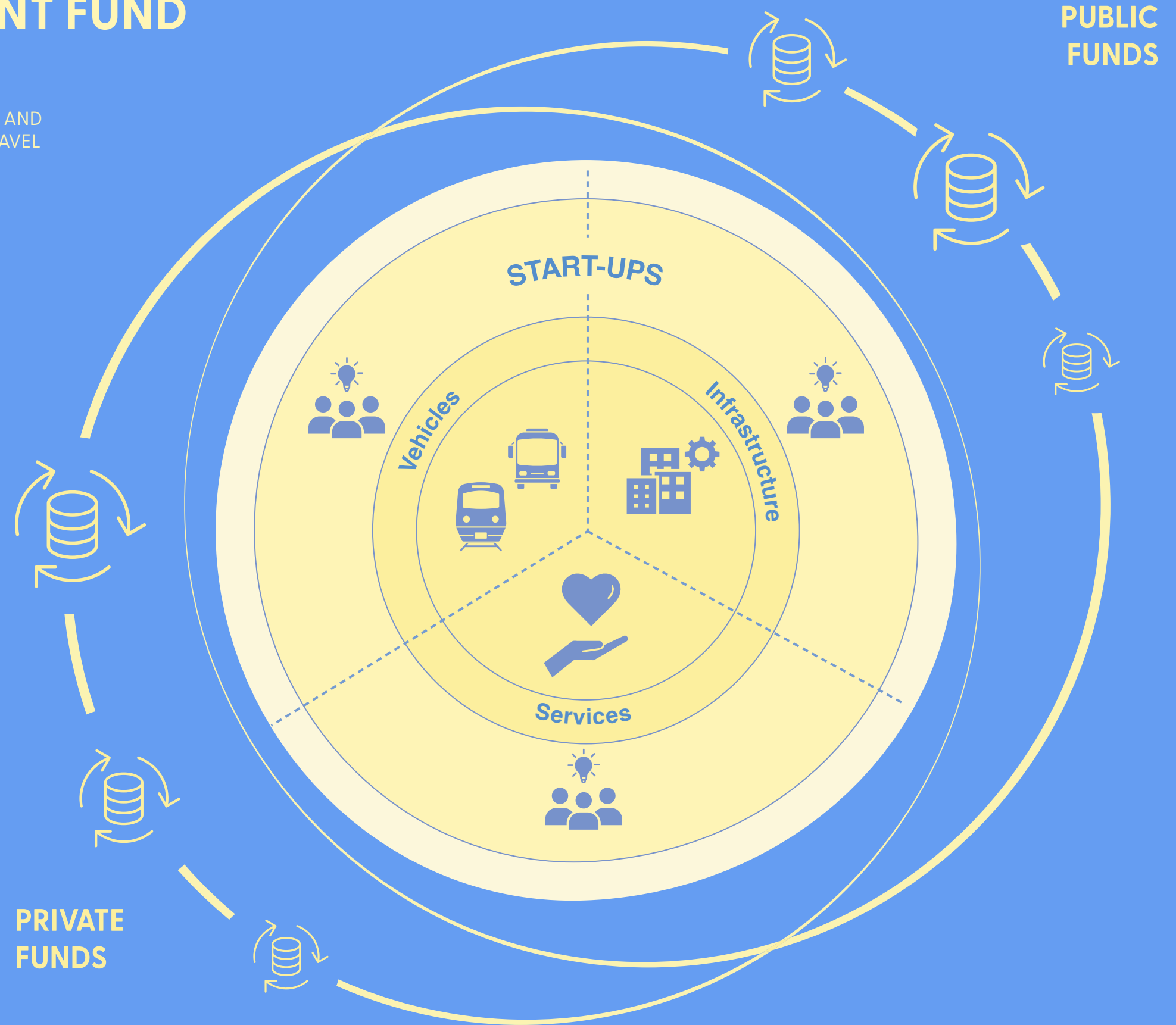
Linking night travel with international tourism opens up significant strategic potential.

Attractive 'Fly Once, Explore Widely' packages are available for guests from Asia, America or the Middle East: Fly to Zurich once using the most sustainable option and then discover Europe by night travel. This combination saves time, reduces CO₂ emissions and offers a unique travel experience.

These packages are developed and marketed internationally in collaboration with tour operators. This positions Zurich as the ideal gateway for sustainable discoveries in Europe, with destinations that can be reached by overnight travel.

INNOVATION INVESTMENT FUND FOR NIGHT TRAVEL

PROMOTION OF INNOVATIVE VEHICLE CONCEPTS, SERVICES AND INFRASTRUCTURE SOLUTIONS FOR COMFORTABLE NIGHT TRAVEL



Carla, 16 July 2040, 0.30 a.m.

I am on the night train from Copenhagen to Zurich and, after an exciting day, I cannot sleep.

Zurich is my next destination after holding talks in Copenhagen about the important European climate movement. The most important appointments for night travel research will be in Zurich, as the Swiss have been instrumental in driving the whole thing forward. After that, we will continue from Zurich to Vienna and Warsaw, where we will also research night buses.

We leave the night train terminal at Copenhagen Central Station. Admission with a digital ticket is automatic. You hand your luggage over to an autonomous logistics robot, who stores it in the mail car. Meanwhile, João guides me to the right compartment, which he has booked according to my preferences. I have a separate sleeping compartment, which gives me a pleasant feeling of security and privacy.

STRATEGIC POTENTIAL: INVESTMENT FUND FOR NIGHT TRAVEL INNOVATIONS

The establishment of a special investment fund for night travel offers promising strategic potential.

Targeted investments promote new vehicle concepts, service packages and infrastructure solutions that make night travel comfortable and economical. This type of fund enables start-ups to quickly develop prototypes and test them in real-world conditions.

This lowers market-entry barriers and accelerates innovation. The overall aim is to develop innovative solutions for a high level of travel comfort at competitive prices.

Pooling public and private funds will make Zurich the centre of night travel innovation.

A STRONG INVESTOR, THE NORWEGIAN GOVERNMENT PENSION FUND INVESTS IN THE NEW EUROPE

Research João, 16 July 2040

Norway's government pension fund, known as the Oil Fund, is one of the largest government funds in the world. It acts as a financial reserve for future generations when oil can no longer be extracted.

In light of the changed geopolitical situation, the Norwegians decided to invest part of this fund in Europe to strengthen the European project and support the European climate movement.

A systematic review of European investment options led fund managers to the European City Alliance and to the Swiss initiators of the Night Travel concept in Zurich.

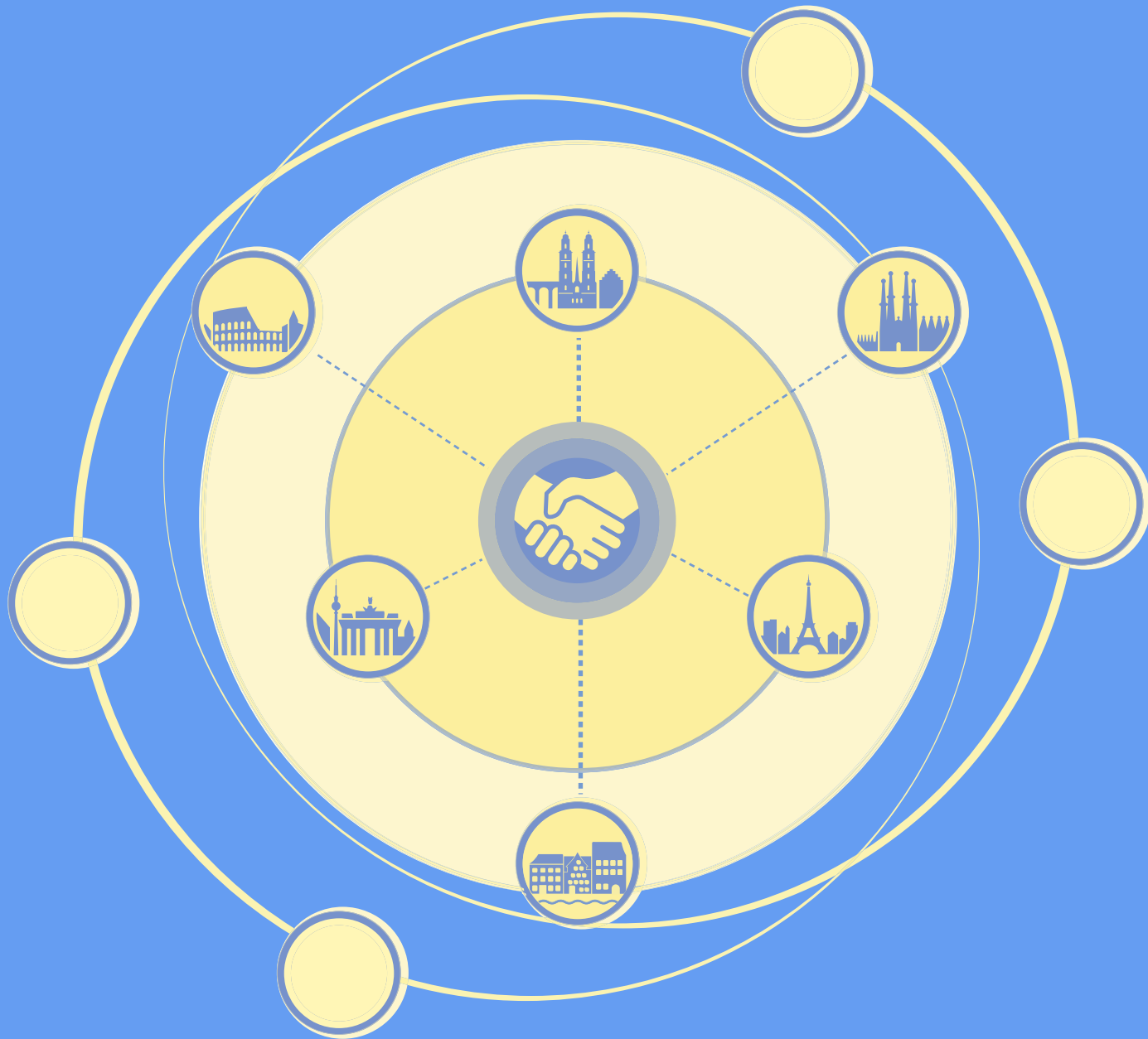
With this support, the Night Travel Alliance, which is managed from Zurich, initially enabled the Zurich Wagon Lits project, which is import-

ant for Swiss industrial policy, and involved the formation of a new European company making Night Travel carriages.

In addition, the government fund, together with Swiss pension funds, has invested in the development of a new night bus prototype by a Zurich start-up that set itself the goal of reinventing long-distance overland travel by introducing premium night bus journeys.

EUROPEAN CITY ALLIANCE

BUILDING A STRATEGIC ALLIANCE OF EUROPEAN CITIES TO PROMOTE NIGHT TRAVEL



THE 'PARLIAMENT' OF EUROPEAN MAYORS

Research João, 16 July 2040

In his book 'If Mayors Ruled the World', political scientist Benjamin Barber proposed the idea of establishing a world parliament of mayors. His argument was that cities respond more quickly and more closely to the major crises of the present day.

His idea has not been implemented on a global scale, but it did inspire mayors in Europe from 2025 onwards. Zurich, Copenhagen, Paris, London, Berlin and Vienna were the first to take up the idea, focusing on climate adaptability and urban mobility. Almost all other European cities later joined this movement. The city network was a civil society 'bottom-up' innovation whose initiatives had a major impact on night travel.

The city network initiated by the city of Zurich promoted the idea of a Europe-wide night travel network with Switzerland as its central hub from 2026 onwards. This involved the expansion of night travel network step by step, starting with the main well-frequented routes. Copenha-

gen, Berlin, Paris and Vienna were the first to join forces with Zurich. As capital cities, they served as show-cases and acted as catalysts for national governments. This made it possible to gain the support of national governments and later the European Commission.

STRATEGIC POTENTIAL: EUROPEAN CITY ALLIANCE

The creation of a strong alliance of leading European cities to promote night travel opens up significant strategic potential. As creative and financial driving forces, the cities achieve a new level of quality for European night transport through working together.

This network launches pilot projects and establishes city connections strengthening tourism, the economy and transport systems. Zurich initiates a powerful alliance with other cities and establishes itself as a central night transport hub.

ADDITIONAL SERVICES FOR NIGHT TRAVEL

DEVELOPMENT OF AN INTEGRATED ECOSYSTEM FOR ADDITIONAL SERVICES FOR NIGHT TRAVEL



ARRIVAL AS PART OF THE NIGHT TRAVEL SERVICE

Carla, 17 July 2040, 7:30 a.m.

Arrival in Zurich... I slept very well in the train, with no disturbances from noise or light. When I arrived, I had a breakfast of fresh pastries, fresh coffee and fresh fruit at a nearby partner hotel of the night train operator.

After getting off the train, João showed me the way to the service centre at Zurich main station. Here you can find information about service providers in Zurich that are of interest to night travellers: hotels or restaurants offering breakfast, luggage storage, gyms with showers and co-working spaces with meeting rooms.

After I have collected my luggage and João has rented me an autonomous electric logistics robot, he showed me the route to my meeting counterparts in the city on my glasses. The people of Zurich attach great importance to ensuring that service robots, rental bikes and rental scooters are well managed.

We're off to the Zurich Tourism office. There I will meet one of the former

managers who played a key role in establishing the Zurich night travel start-up cluster fifteen years ago. I will also meet the city's former Director of the Environment and Health Protection Department.

In addition to the obvious advantages of overnight transport for travellers, we will also discuss additional services that have contributed to the success of night travel – primarily logistics services for travellers, but also overnight logistics for postal and parcel service providers.

POSTAL TRAIN REVIVAL AND INTEGRATED LOGISTICS

A major advantage of the new night travel system is luggage logistics. The night travel system offers secure luggage transport for standard chipped luggage items. The favourable prices are made possible by effective AI logistics tools.

Passengers travelling with luggage give it to an electric logistics robot on the platform before departure, who loads it into a separate luggage carriage. When travelling overnight by bus, luggage is usually transported in a luggage trailer. In both cases, the sleeping compartment is freed from luggage storage, and passengers do not have to restrict themselves in terms of luggage.

In addition to luggage transport, a thriving business in goods transport has developed. The night travel logistics systems transport all kinds of goods overnight – from postal items and spare parts to fresh food.

This integrative approach makes optimal use of the existing infrastructure and generates additional revenue which helps to reduce passenger fares. This has enabled the highly successful 'belly load' concept from passenger aviation to be cleverly adapted for night trains, as already recommended by French studies in the early 2020s.

STRATEGIC POTENTIAL: ADDITIONAL SERVICES FOR NIGHT TRAVEL

Perfect night travel involves more than just the journey itself. Developing a complete service ecosystem has proven to be a strategic potential: showers and changing rooms in the morning, flexible luggage storage and logistics, first-class breakfast catering and seamless onward transport.

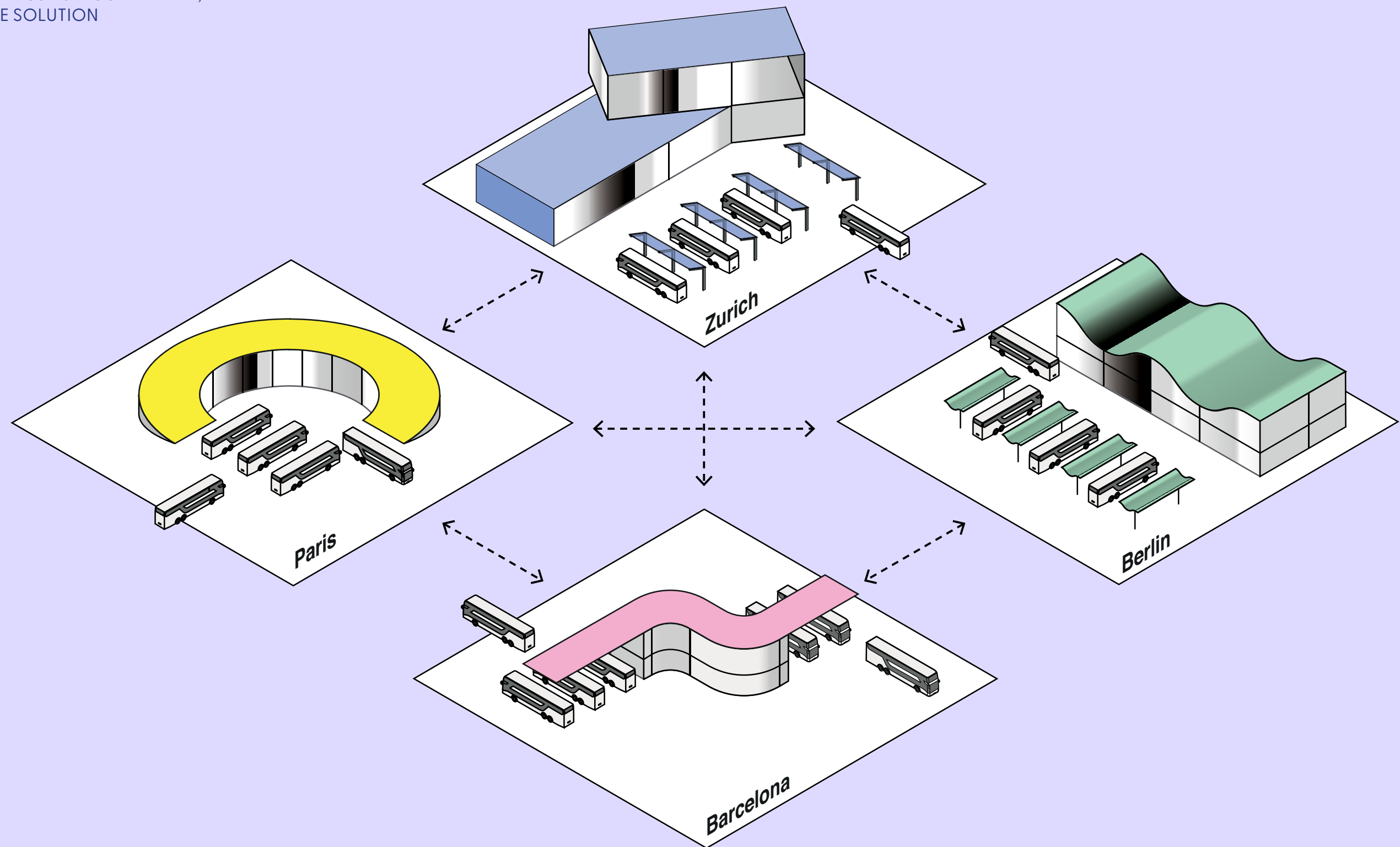
These services can be booked directly with the train or bus ticket.

Hotels near train stations and bus arrival points also offer these services, making them important partners.

These measures make night travel particularly attractive for business travellers and enhance the travel experience for all passengers. As an additional service, night travel also transports goods, thereby increasing its economic efficiency.

EUROPEAN PILOT PROJECT FOR NIGHT BUS CONNECTIONS

POSITIONING THE NIGHT BUS AS A CONVENIENT, FLEXIBLE AND QUICKLY SCALABLE SOLUTION



THE FUTURE IS BEING SHAPED IN ZURICH

From 2024 to 2025, partners from the city of Zurich and city marketing conducted a night travel study to examine the feasibility of night travel – with the idea of combining the interests of Zurich, of Switzerland and Europe as a whole. They sensed that something was ‘in motion’ in Europe.

The strategy project gave rise to a powerful vision for the future. This vision was expertly developed in the light of geopolitical upheavals and global warming. This led to greater involvement of the city of Zurich, which enabled a European city alliance for pilot projects and promoted the start-up cluster for night travel solutions. A night-time lifestyle campaign repositioned night travel as an attractive tourist experience.

Berlin, Paris, Vienna, Copenhagen and Zurich agreed to implement demonstration projects on test routes between their cities and, in addition to their own funds, obtained support from the Swiss national government and the EU Commission, which were

attracted by the potential for industrial policy and tourism policy.

Since night travel by bus was easier to scale than by rail, start-up financing for a night bus prototype was provided in the summer of 2026 with a Zurich-based night bus start-up. The aim was to test the market situation: How attractive is a night bus system in Europe? Which target groups are interested? Which aspects of convenience are decisive?

The launch of a pilot and demonstration project for night travel by rail took a little longer. In 2026, a cooperation was established with a Berlin-based night train start-up for a prototype between Berlin and Zurich, which then began operating in 2029.

Also important was the third research project, which involved the AI-based modelling of a pan-European night travel system. After two years of work, AI was used to create a convincing model for the compre-

hensive optimisation of accessibility throughout Europe by linking rail and road transport.

Despite longer journey times compared to air travel, rail and road transport promised better connectivity for all European regions and a fairer allocation of regional value creation. The key feature of the system lies in the combination of road and rail transport with mutual spillover effects.

Night trains and night buses did not create independent travel systems, rather, night bus and night train providers jointly developed a network of complementary services

STRATEGIC POTENTIAL: EUROPEAN PILOT PROJECT FOR NIGHT BUS CONNECTIONS

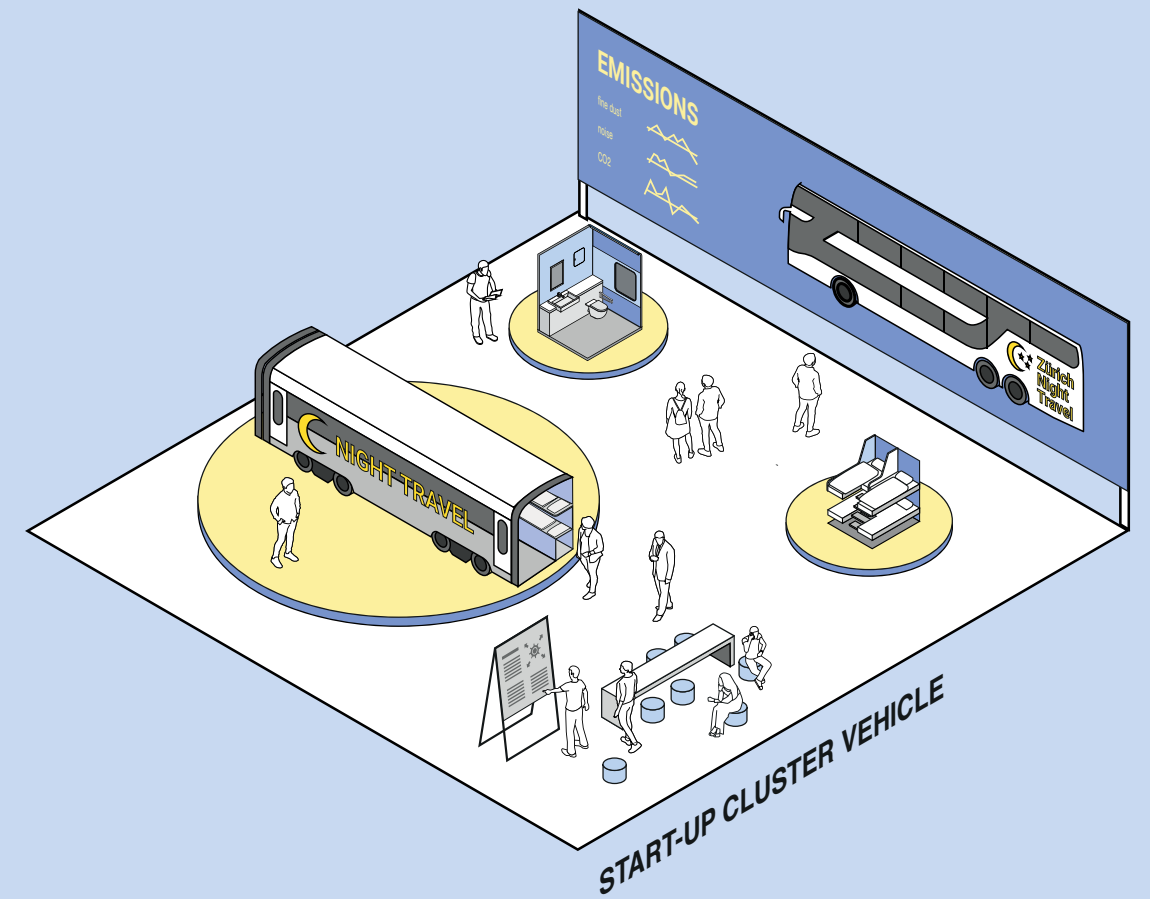
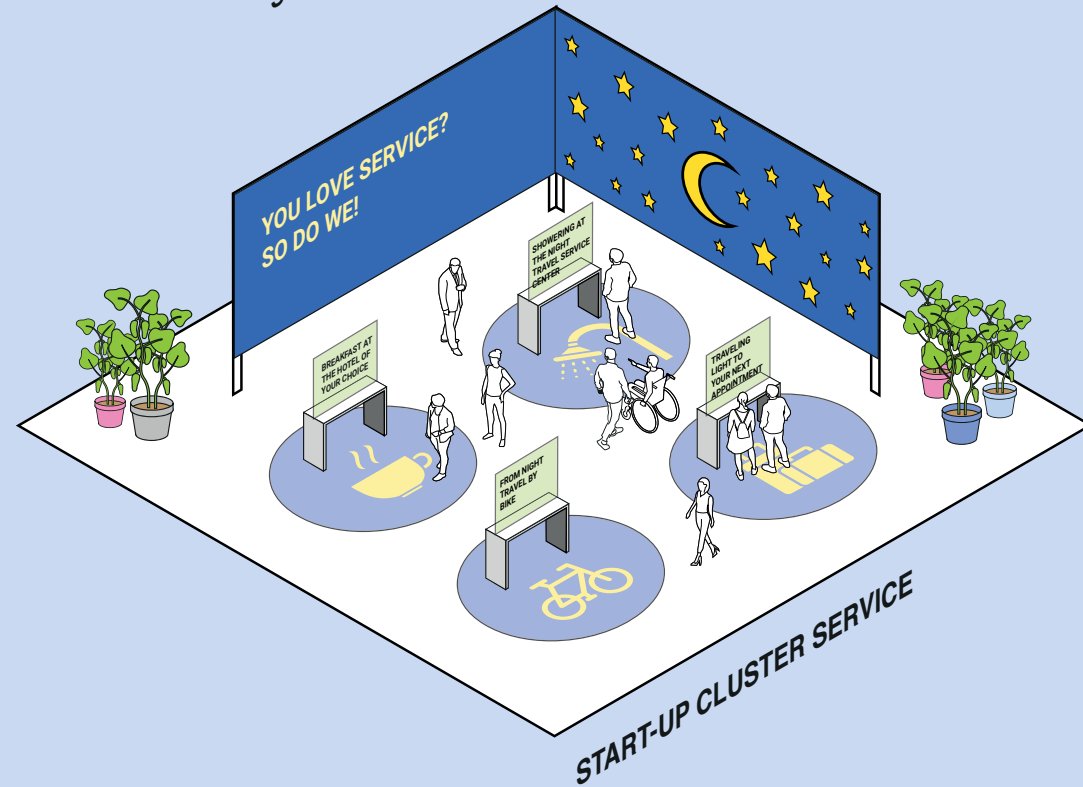
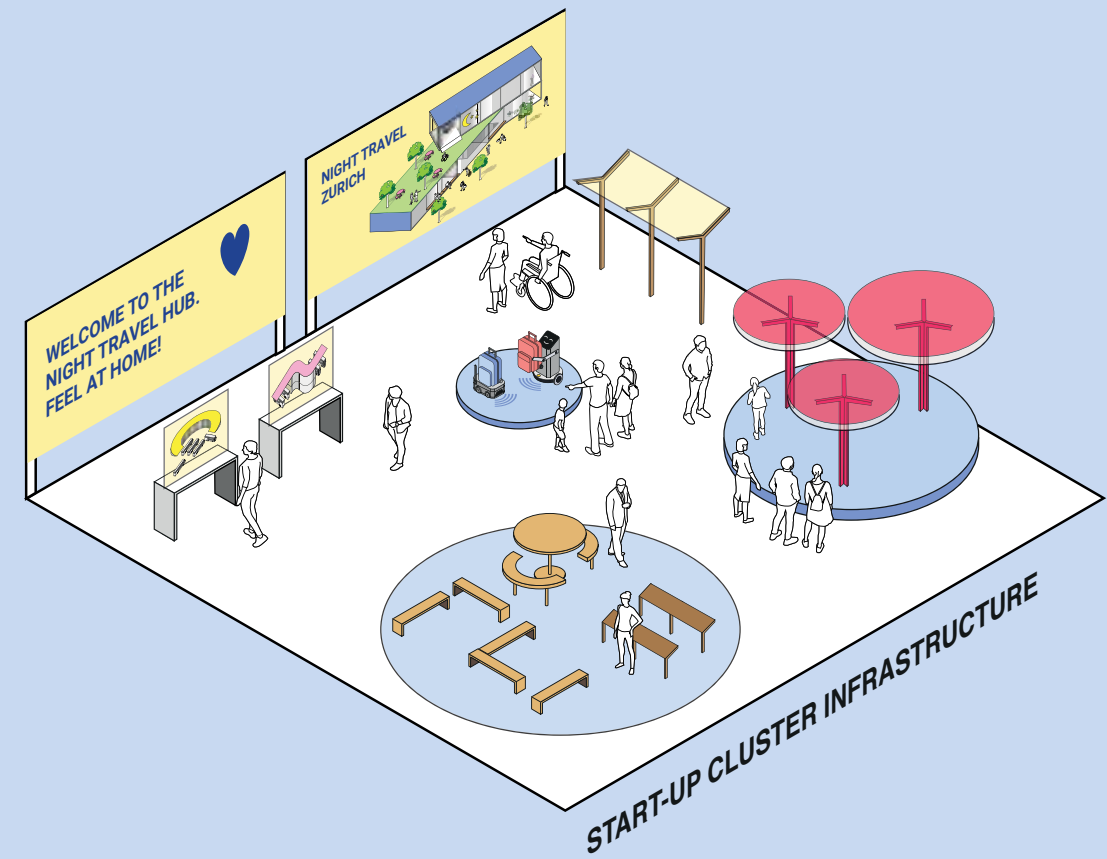
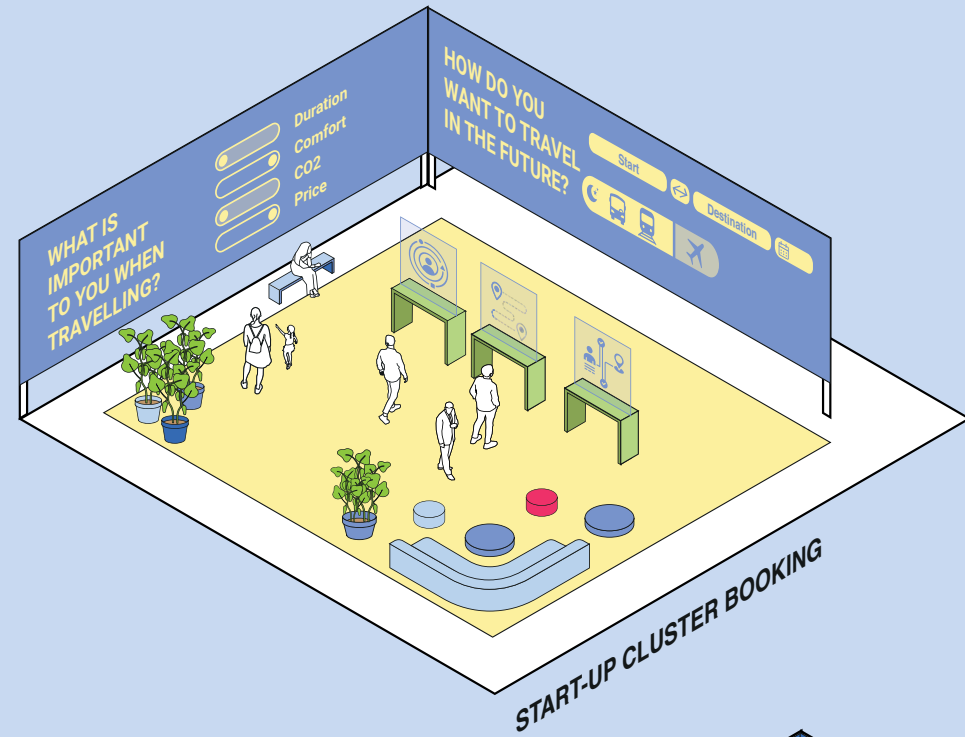
A European test project for the operation and comfort of night buses offers promising strategic potential. Night buses complement the night train network, open up new regions in a flexible manner and can be scaled up quickly.

Selected routes between Zurich and European destinations are being tested in a pilot operation. Night buses offer a high level of sleeping and travel comfort at attractive prices. The project shows which routes are particularly in demand and which comfort features travellers appreciate most.

This provides the basis for a Europe-wide night bus network with Zurich at its centre.

NIGHT TRAVEL START-UP CLUSTER

PROMOTING AN INNOVATION ECOSYSTEM FOR SUSTAINABLE
NIGHT TRAVEL SOLUTIONS



THE NIGHT TRAVEL START-UP CLUSTER ZURICH: INNOVATION FACTORY FOR NEW TRAVEL

Parallel to the initial successes of the demonstration projects, the city of Zurich founded the 'Night Travel Start-up Cluster' in 2027. A former industrial hall near the main railway station was converted into a centre for over 50 start-ups developing innovative solutions for night travel.

The cluster offered low-cost workspaces, specialised laboratories and a unique test field using old train carriages and buses as experimental platforms. The 'Sleep Lab', where companies could test sleep concepts under realistic conditions, was particularly innovative.

The combination of digital and physical innovations became a key fac-

tor for success. Software developers, designers, automotive engineers and sleep researchers created new solutions through interdisciplinary collaboration.

Among the most successful spin-offs were SleepTech, which develops innovative materials for noise-free travel, NightSync, with AI-controlled lighting systems adapted for biorhythms, and Connect Services, which has revolutionised the integration of connection services.

The cluster created numerous jobs and attracted several million euros of venture capital. Its success story has served as a model for similar centres in other European cities.

ZURICH-WAGONS-LITS (ZIWL)

Research João, 17 July 2040

ZIWL (Zurich Compagnie Internationale des Wagons-Lits) is a newly founded European sleeper carriage company based in Zurich, which operates under the trademark and tradition of the historic Compagnie Internationale des Wagons-Lits.

The aim of the new company is to develop contemporary equipment for the European night train system, initially with the support of the Norwegian Government Pension Fund to develop prototypes, test tracks and a digital ecosystem for booking and services.

ZIWL is a sustainable company that has aligned its production with the principles of the circular economy using sustainable and renewable raw materials. The design of the carriages is continuously tested and adapted in a user-centred approach.

STRATEGIC POTENTIAL: NIGHT TRAVEL START-UP CLUSTER

The establishment of a dynamic start-up cluster for night travel in Zurich opens up promising strategic potential.

Targeted funding supports innovative founders who are developing new solutions for comfortable and sustainable night travel. Coworking spaces, mentoring programmes and access to test markets help to achieve this.

The cluster connects start-ups with established companies, investors and research institutions. This makes Zurich an innovation centre for night travel and the city benefits from new jobs, technologies and international attention.

ZURICH NIGHT BUS FLEET

SECURING STRATEGIC CONNECTIONS WITH OUR OWN VEHICLES



THE CITY OF ZURICH'S NIGHT BUS FLEET: A MODEL FOR MUNICIPAL MOBILITY MANAGEMENT

One remarkable innovation is the City of Zurich's night bus fleet, which started with five vehicles in 2028 and now comprises over 30 vehicles.

The city recognised early on that the success of night transport could not depend solely on rail transport. The flexibility of night bus services was indispensable for a complete network and in order to make the testing of new city connections possible at short notice.

The fleet consists of various types of vehicles, from 20-seater buses with luxury reclining seats to double-deckers with various comfort classes. All the vehicles are distinctive and uniformly designed in the night travel style.

The special feature of the Zurich model is that the city owns the vehicles but does not operate them itself. The buses are leased to specialist opera-

ting companies on favourable terms, coupled with quality and service standards. The 'Züri-Nachtbus für alle' (Zurich night bus for everyone) programme, which allows schools, clubs and non-profit organisations to use the buses at reduced rates for group travel, remains particularly popular.

The Zurich model has been adapted by more than 40 European cities and is considered a prime example of municipal mobility management. The vehicles are manufactured in the region – in a cooperation between established bus manufacturers and start-ups from the night travel cluster.

Carla, 18 July 2040, 10:20 p.m.
Departure from Zurich to Vienna. Tonight, I will have a new experience travelling to Vienna, as I will be taking the night bus for the first time. I am travelling to Vienna to conduct research on climate adaptation in the Alpine Republic, which needs to reinvent itself economically due to the lack of snow in winter and the threat of severe weather in the mountains, by developing climate-adapted tourism strategies.

This evening, I will take the night bus back to Zurich. This means I will arrive in Vienna well-rested and can sleep again on the return journey tonight. The night bus is uncomplicated, functional and surprisingly roomy.

The seats are at the heart of the service experience. They can be converted into a bed at the touch of a button, offering enormous comfort for working, relaxing or sleeping – just like in business class on a long-haul aircraft.

Before retiring for the night, you can slip into something more comfortable in a changing room. There are functional rooms, e.g. a spacious toilet, a changing room and a snack bar.

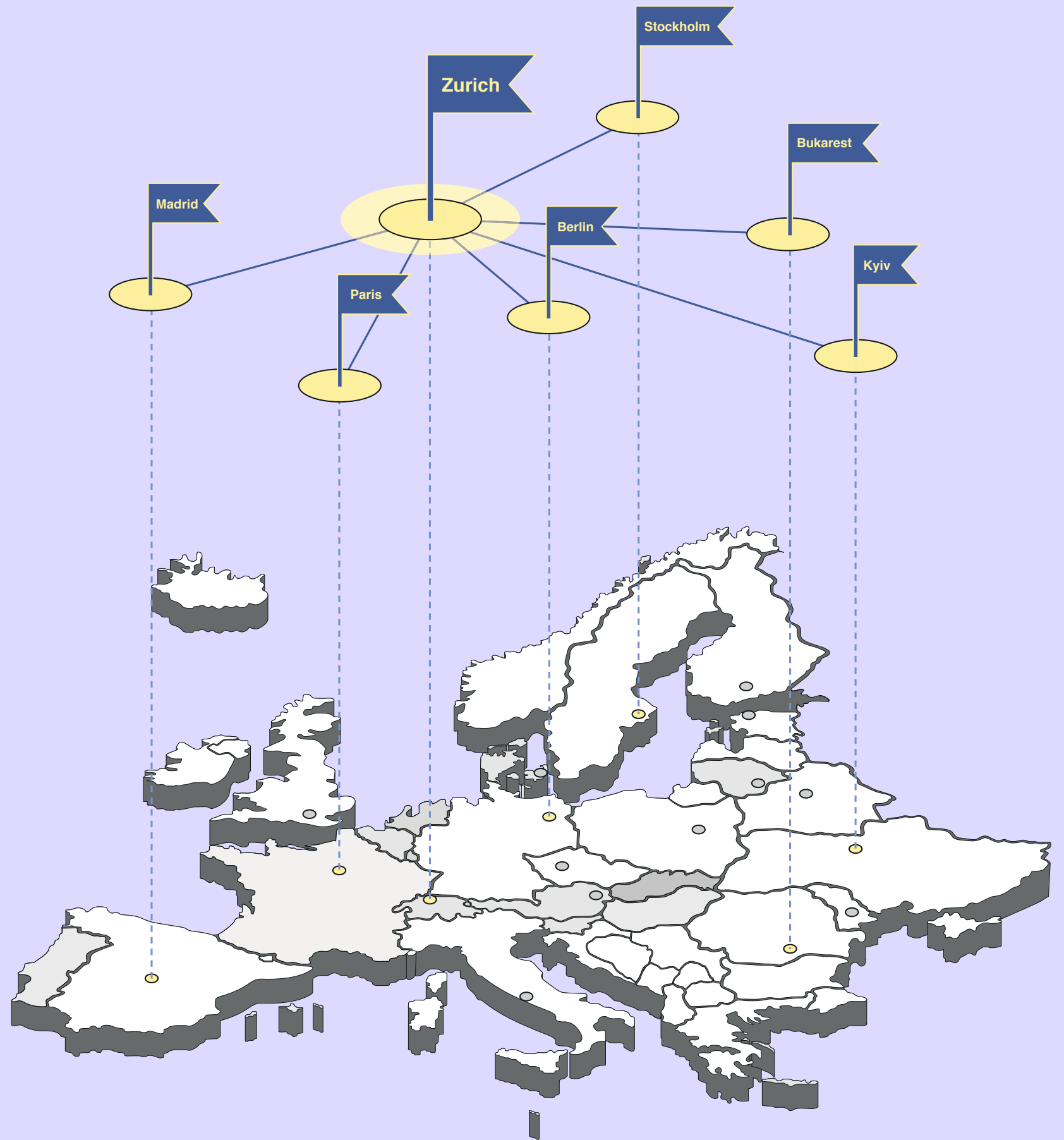
STRATEGIC POTENTIAL: ZURICH NIGHT BUS FLEET

The creation of an urban night bus fleet for Zurich offers interesting strategic potential. Modern, comfortable buses are available to operators at favourable conditions. These allow operators to test and establish new connections with low risk and low investment. Schools, clubs and cultural institutions also use the buses for group trips.

The fleet gains important connections, creates flexibility and makes night travel accessible to everyone. This makes Zurich a role model for the promotion of active urban night travel.

DESTINATION DEVELOPMENT FOR NIGHT TRAVEL

OPENING UP NEW TRAVEL DESTINATIONS



STRATEGIC DESTINATION DEVELOPMENT: ZURICH AS A HUB IN EUROPE

One of Zurich's most important strategic decisions was to actively develop new night travel destinations from 2029 onwards. A specialised team at Zurich Tourism identified the most promising connections based on business travel data, tourism trends and cultural links.

The strategy was based on the concept that demand could be actively created. Zurich and Zurich Tourism systematically contacted European cities and proposed tailor-made night-time connections.

The city created an attractive incentive programme for night travel operators: reduced terminal fees, attractive marketing measures and operating cost subsidies in the initial phase. A digital platform provided real-time data on trends, utilisation and customer feedback.

In 2030, Zurich became the leading hub in the European network with over 120 direct night travel connections. Night travel has not only physically reconnected Europe but also brought its people closer together.

Carla, 20 July 2040,
Departure from Zurich at 7.30 p.m.,
now to experience the flair of the
Swiss Express premium night train on
the journey to Warsaw.

I was told in Zurich that from a marketing perspective, it was a great idea to combine the relaunch of the night service with sending a themed demonstration train onto the rails.

In Warsaw, I will talk about Poland's role as a Baltic country and the efforts to restock and restore the Baltic Sea together with Finland, Sweden, Denmark, Latvia, Lithuania and Estonia, after its ecological balance had been severely endangered in the early 2030s.

SWISS EXPRESS – THE PREMIUM EXPERIENCE ON RAIL

Research João, 20 July

This premium night train is a niche product in the theme-tourism genre and is complemented by newly re-created, classic carriages.

The historic Orient Express is the model – a luxury train consisting of sleeper and dining carriages operated by the Compagnie Internationale des Wagons-Lits, which ran for the first time in 1883 from Paris to Constantinople. The Orient Express became famous not only for its luxury and its rich and titled European passengers, but also for its role in popular culture.

The Orient Express soon became known as the train of diplomats, spies and adventurers – the epitome of luxurious travel, combined with a mysterious charm.

The historic Orient Express was a superlative service, and the new Swiss Express is also equipped with modern amenities: luxurious water dispensers, the best air filters,

climate-neutral food at Michelin-star level, wellness treatments that can be booked in advance, excellent network connectivity, childcare and pet care, and much more.

Due to the wave of positive publicity of night travel, exclusive train journeys have once again become a symbol and medium of international diplomacy in Europe.

STRATEGIC POTENTIAL: DESTINATION DEVELOPMENT FOR NIGHT TRAVEL

Zurich's development into Europe's leading night travel hub offers significant strategic potential. Similar to the way airports introduced hubs, new destinations and routes are being actively developed.

Market analysis is carried out in collaboration with tour operators to identify the most attractive city connections for night travel. Operators receive support in developing these routes. Innovative offers are initially promoted to create a dense network of direct night travel connections from Zurich to destinations across Europe. Travellers benefit from a wider choice and better, new connections to attractive destinations.

08

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Véronique Stephan
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Market SBB

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