

TECHNOLOGY, INNOVATION & STRATEGY FOR THE ENTIRE RAIL SUPPLY CHAIN

Rail technology is changing

Rail Live! is an exhibition and sponsored conference that brings together an all encompassing rail show with a high level, strategic conference about all that is exciting and innovative in the rail sector.

The exhibition will showcase the full range of innovation in the sector from civil engineering, to construction, track innovation, new machine tools and rolling stock.

The conference will concentrate on how new technologies (such as machine learning, BIM, IoT and additive manufacturing) are being applied to a very traditional industry (from construction to tracks to stations and maintenance) with revolutionary new outcomes for operators and their partners.

Join us at Rail Live! 2023 to

- **Showcase** your rail services and innovations to a busy exhibition of 10,000 visitors looking for solutions to streamline their operations.
- **Share** your big picture insights on the keynote stage, to an audience of 2,000 rail operators, government agencies and infrastructure managers.
- **Dive** deeper into the issues in our 12 focused conference themes, full of decision makers from the global rail industry.
- **Benefit** from one-on-one meetings with rail leaders from the global industry throughout the 3 days of Rail Live!
- **Position** your brand as a leader in rail technology.

For world-class solutions providers from the entire value chain

Rail Live! offers outstanding opportunities for solutions providers, from senior sponsorship to a range of exhibition booths on a fantastic floor plan. If you are looking to the future of the rail industry, then this will be your best ROI in 2023.

RAILLIVE!

FEATURES

- | | | | |
|---|---------------------------------------|---|--|
|  | 350+
Expert
Presenters |  | 12
Conference
Themes |
|  | 250+
Exhibitors |  | 50+
Start-Ups |
|  | 10,000
Visitors |  | 90+
Countries
Represented |
|  | 750+
Companies
Attending |  | Academic
Poster Zone |
|  | Site
Visits |  | Careers
Zone |

AND A WHOLE LOT MORE...

is the must attend event for operators, infrastructure managers, rolling stock manufacturers and their suppliers, academia and government seeking to make rail the go-to mode of transport on a global scale. It is the place for market knowledge, innovation and new business for the entire supply chain.

WHAT'S NEW FOR 2023

World Class Exhibition

Rail Live! brings together 250+ innovation driven exhibitors who provide solutions tailored to your company's needs. It is the place for the rail community to create new partnerships, demonstrate new capabilities and unveil new innovative technologies.

Careers Zone

Recruitment, training and retention at all levels remains a huge struggle for the industry. Rail Live will serve as a place where people can explore what a career in rail entails and give companies the opportunity to attract new talent.

Academic Poster Zone

Innovation comes from the partnership between academia and industry. We will be featuring a poster zone where academics can showcase the latest research areas they are working on and how these ideas will make it onto the track.



WHO ATTENDS

RAIL OPERATORS



METRO RAIL & TRAM



INFRASTRUCTURE MANAGERS



FREIGHT



INDUSTRY



ATTENDEES ACROSS THE VALUE CHAIN

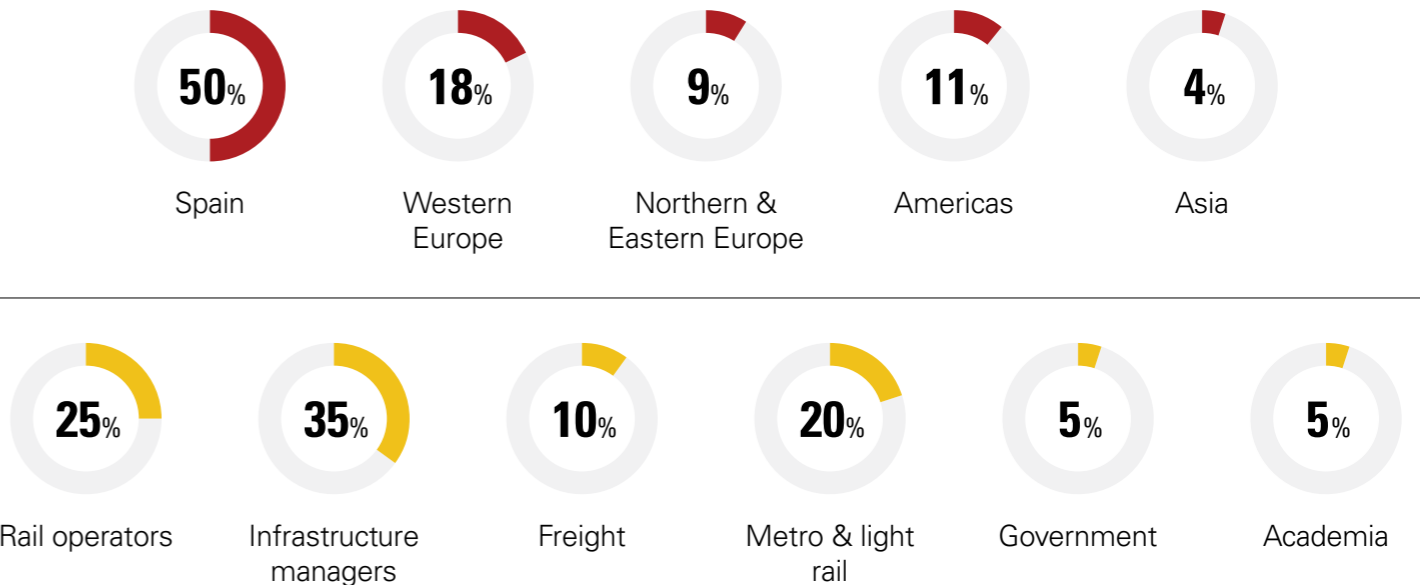
SECTORS

- Infrastructure managers
- Rail operators – commuter, passenger, high speed
- Metro and light rail
- Freight, ports, logistics
- Financiers
- Asset managers and maintenance
- Smart infrastructure
- Construction and engineering
- Integrators
- Signalling and communications
- Energy & power
- Rolling stock
- Fixed infrastructure and track
- Digital
- Station infrastructure
- Machine tools and components
- Cyber security

JOB TITLES

- Chief Executive
- Managing Director
- Director General
- Chief Technology Officer
- Chief Engineer
- Strategy and Business Development Director
- Asset Management Directors and Engineers
- Project & Construction Directors
- Metro Director
- Director of Innovation
- Sustainability Director
- Project Management Director
- Cybersecurity Director
- Signalling & Train control Directors
- Operations and Planning Director

OUR ATTENDEES COME FROM



GLOBAL INVESTMENT IN RAIL

In 2021 alone, 276 rail construction projects broke ground, at a combined cost of \$500bn. The most common type of rail construction projects were mass transit or metro projects. A third of all railway projects across the globe were mass transit or metro projects, costing a total expenditure of over \$221bn. Rail Live! is the place to learn, share and network so that the industry can showcase the innovation which is making rail the go to mode of transport.

1



24.2bn Euros

2



1.2bn Euros

3



7.5bn Euros

4



5.4bn Euros


5



22.6bn Euros



6



9.5bn Euros

7




8bn Euros

8



28bn Euros

9



8.2bn Euros

10




2.8bn Euros

11



1.7bn Euros

12



4.2bn Euros

16



86bn Euros

15



104bn Euros

14



18bn Euros

13



5.5bn Euros

MEET THE BIG PLAYERS IN THE GLOBAL RAIL INDUSTRY



MARIA LUISA DOMINGUEZ
President, **ADIF**




ISAÍAS TÁBOAS
President, **Renfe**




AGNIS DRIKSNA
CEO, **Rail Baltica**




DYAN CROWTHER
CEO, **HS1**




JOHN VOPPEN
CEO, **ProRail**




SILVA ROLDAN
CEO, **Metro de Madrid**




MIKE COOPER
Group CEO, **Arriva**




JAVIER MARTINEZ OJINAGA
CEO, **CAF**




LEOPOLDO MAESTU
Managing Director, **Alstom España**




KAROLIS SANKOVSKI
CEO, **LTG Infra**




KRISTIAN SCHMIDT
Director Land Transport, **European Commission**




MANEL VILLALANTE
General Manager Strategy & Development, **Renfe**





MIKOŁAJ WILD
CEO, **Solidarity Transport Hub**





PHILIPPE CITROEN
Director General, **Unife**




CARLO BORGHINI
Executive Director, **Europe Rail**

EVA KREIENKAMP
CEO, **BVG**




MICHAEL RÜFFER
Chief Technical Officer, **VGF**




ANA MORENO
CEO, **Tranvías de Zaragoza**




HÉLÈNE VALENZUELA
Managing Director, **Ouigo**




RUBÉN LEONOR BRAVO
Chief Strategy Officer, **RENFE**




FABRICE MORENON
Managing Director, **SNCF Hubs & Connexions**




DARREN KETTLE
CEO, **Metrolink**




BRIAN KELLY
CEO, **California High Speed Rail Authority**




SONIA ARAUJO
Directora General, **Renfe Viajeros**




DAS MOOTANAH
CEO, **Metro Express**





PABLO PASTEGA
Managing Director, **FlixBus Spain & Portugal**





GONZALO URQUIJO FERNÁNDEZ DE ARAZ
CEO, **Talgo**




ADOLFO REBOLLO
CEO, **Ingeteam**

MANUEL FRESNO
Chief Financial Officer, **ADIF**




OSCAR PLAYÀ
Director de Metro, **TMB**




JÖRN SCHWARZE
Member of the Board, **KVB**




DIRK BECKERS
Director, **CINEA**





TOBIAS FISCHER
Head of Technology at Teclab, **Deutsche Bahn**





RICARDO MACHADO
Senior Director of Project Development, **Metropolitano de Lisboa**





CARSTEN WIEBERS
Global Head Aviation, Mobility & Transport, **KfW IPEX-Bank**


THOMAS KRITZER
Division Tramway Operation Head, **Wiener Linien**





DAVID PANG
Treasurer, **MTR Corporation Limited**




MIGUEL NUÑEZ FERNÁNDEZ
General Director of Collective Transport Infrastructures, **Comunidad de Madrid**

DAVID BARNETT
Head of Engineering, Rail & Bus, **Translink**




ÁNGEL MUÑOZ HERNÁNDEZ
Jefe de Servicio – Área de Material Rodante, **Agencia Estatal de Seguridad Ferroviaria**




ANGELES TAULER
Gerente PTFE-Subdirectora Estrategia, Innovación y Formación, **FFE**




RAQUEL CALVO ALLER
Responsable del Área de Gestión Operativa de Líneas, **Metro Madrid**





JESSICA OUTERIÑO
Directora de Planificación Estratégica de Metro, **TMB**






DANIEL QUINTERO
Director de Ferrocarriles, **GlobalVia**





ANDREW MCNAUGHTON
Chairman, **Network Rail High Speed**

TERESA BENET
Head of International Business Development, **Metro Tenerife**

STEVE DUCKERING
Head of Operations, **UKTram**




TAMI BULLER
Tel Aviv Metro Planning and Design Director, **NTA Tel Aviv**



TECHNOLOGY. INNOVATION. STRATEGY.

METRO & LIGHT RAIL

The backbone of mobility within cities. As these systems grow and expand their thoughtful and inclusive design is key to ensuring citizens choose this mode of travel.

DIGITAL TRANSFORMATION

Digital products and key innovations continue to push the boundaries of the rail industry to perform better, more efficiently, and more cost effectively.

SMART INFRASTRUCTURE

Railway infrastructure is under incredible pressure to optimise capacity and reliability while simultaneously reducing costs.

SAFETY, SECURITY & CYBER

Safety has always been a priority of the rail industry. Today this priority has expanded well beyond the physical and into the digital realm.

SMART MOBILITY

By integrating first-and-last mile options and allowing for multimodal journeys, rail can ensure that the journey to and from our stations are just as sustainable as everything in between.

SIGNALLING & TRAIN CONTROL

Cutting-edge train controls and innovative signalling systems are at a critical turning point in their development whilst the rollout of CBTC, ETCS, and ATO, will revolutionize track capacities.

FREIGHT

We explore how the Rail Freight market can compete more effectively against other modes, including road. Commercial and technical challenges are critical to increase competitiveness and enable this modal shift.

FUNDING & FINANCING

The funding and finance of rail remains a challenge for government at all levels. Exploring ways new, innovative funding models are being deployed by institutional investors will guarantee that necessary funds are accessible.

ENERGY & CLIMATE RESILIENCE

As governments around the world implement net zero targets, we'll showcase how the rail industry is meeting the need to further reduce carbon emissions and adapt to new sustainability standards.

SPANISH SYMPOSIUM

Highlighting the main challenges facing the Spanish rail market and what the countries metros, infrastructure manager and operators are doing to overcome these.




TRAINING & DEVELOPMENT

How does a career in rail become an attractive and rewarding career? We'll explore the role of government, academia, industry, operators, and infrastructure managers in training and developing the rail leaders of the future.






MEGA PROJECTS

Investment in rail is key to ensuring economic growth and prosperity. Ensuring these projects move beyond the drawing board and are built at pace remains challenging for all of those involved.

CONFERENCE TOPICS

											
5G	Accessibility	Additive manufacturing	Advanced Mechanics	Architecture & Design	Artificial Intelligence	Asset Maintenance	Autonomous Vehicles	BIM	Blockchain	Connectivity	Construction & Engineering
											
Cyber Security	Data Analytics	Digital Analytics	Digital Logistics	Digital Twin	Diversity	Drone Inspection	Electrification	Energy & Power	Future Stations	Hydrail	Infrastructure Inspection
											
IoT	Logistics & Freight	Liberalisation & Competition	Machine Tools	Motive Power	Project Financing	Rolling Stock	Safety, Security & Equipment	Signalling & Train Control	Smart Mobility	Sustainability	Telecommunications

CONFERENCE THEMES

			
Digital Transformation	Energy & Climate Resilience	Freight	Funding & Financing
			
Mega Projects	Metro & Light Rail	Safety, Security & Cyber	Signalling & Train Control
			
Smart Infrastructure	Smart Mobility	Spanish symposium	Training & Development

WHY SPONSOR OR EXHIBIT

RAILLIVE!

Presents unique annual opportunities across several event channels, all designed to deliver business development and thought leadership opportunities.



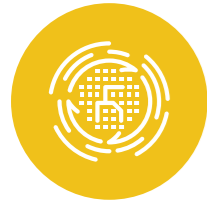
THOUGHT LEADERSHIP PRESENTATIONS

Build trust in your product and solutions by demonstrating your pre-eminence among the leaders in the rail sector.



SHOWCASE

The exhibition floor is the place to showcase new technology and build new business connections: establish a base so your clients can find you easily.



BRANDING AND SIGNAGE

Develop awareness of your brand before, during and after the event.



USE CASE PRESENTATIONS

Demonstrate your success stories and show how your solutions can be applied in other settings.



NETWORKING AND SOCIAL

Impress the world with your hospitality across our networking tools and social events.



LEAD GENERATION

Gain new business opportunities across the whole highways value chain.

SPONSORSHIP OPPORTUNITIES

BENEFITS	TITLE	DIAMOND	PLATINUM	GOLD	SILVER	BRONZE
Keynote Speech	Day 1	Day 2 or 3				
Track Presentation	3	2	2	2	1	1
Theme track Sponsor			Yes			
Stand	54	48	48	36	24	
1-2-1 Meetings	Yes	Yes	Yes	Yes		
Cost	€ 55,000	€ 35,000	€ 25,000	€ 18,000	€ 13,000	€ 8,000

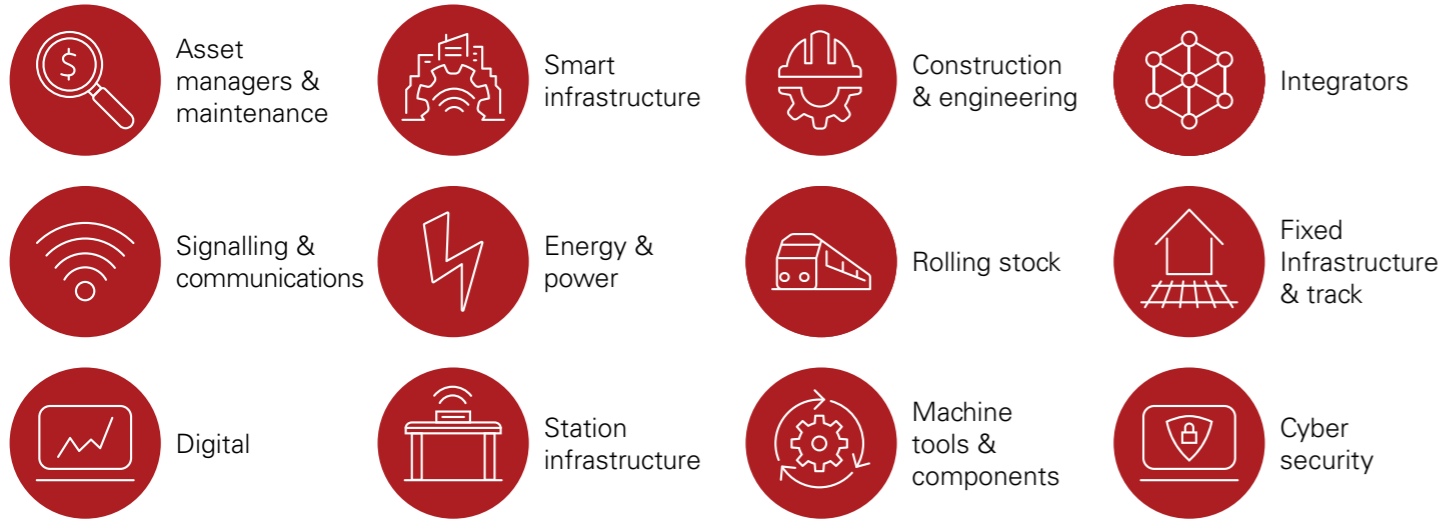
EXHIBITION PRICING

Shell	€490 per sqm
Space	€395 per sqm
Space (Over 48sqm)	€295
Registration Fee (Waived for stands over 12sqm)	€695

EXAMPLES

Booth Dimension sqm	Price per sqm €	Registration Fee €	Total Price €
12sqm Shell	490	695	6,575
24sqm Space	395		9,480
36sqm Space	395		14,220
48 sqm space	395		18,960
54sqm Space	395(48) + 295(6)		20,730
96sqm Space	395(48) + 295(48)		33,120
192sqm Space	395(48) + 295(144)		61,440

OUR SPONSORS & EXHIBITORS ARE WORLD CLASS SOLUTION PROVIDERS



Previous Sponsors & Exhibitors



CALL FOR START-UPS

Digitisation and technology are speeding up changes across industries, and rail is no different. Innovative new ways of thinking are key to making this transformation real. If you have a product or service which is poised to alter the trajectory of rail, then join the industry at Rail Live and have the chance to showcase your idea to key stakeholders.

BENEFITS OF PARTICIPATION:

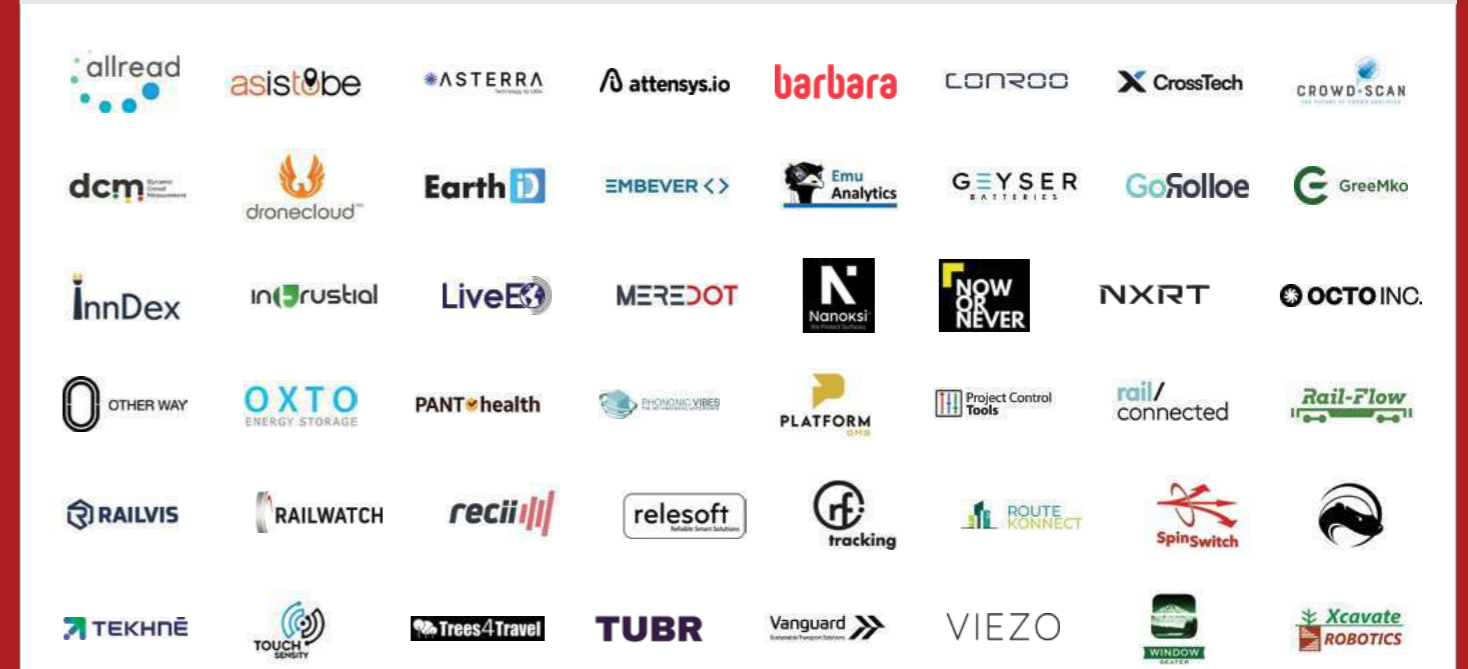
- 1m² booth
- X5 full access passes to the event exhibition and conference
- Networking application to pre arrange 1-1 meetings at the congress on private bookable tables
- Branding on event materials
- Marketing from Terrapinn
- Listing on event web page

Qualifying start-ups need to be founded no earlier than 2019.

Are you a start-up interested in presenting your solutions to the rail industry? To discover if you are eligible for a free start up pod at Rail Live 2023, please get in touch with: charlie.abrines@terrapinn.com



Previous start-ups



RAILLIVE!



IN MADRID

As one of the key transport hubs in Europe, our location is no coincidence. Having partnered with many of the operators, infrastructure managers and metros in Spain and neighbouring countries, we have an excellent network of professionals for you to engage with.

Madrid is Spain's capital and most populous city. Its location at the centre of the Iberian Peninsula is no coincidence as it has historically served as the connecting node bringing north, east, south and west together. Given its location it's no surprise that it's home to the country's national operator Renfe and infrastructure manager ADIF, whilst also hosting the largest metro system, Metro de Madrid. As the capital city, it hosts key government departments like the Ministry of Transport and other arms-length bodies such as La Fundación de los Ferrocarriles Españoles who are responsible for promoting rail.

Since the first high-speed journey connecting Madrid and Sevilla was accomplished, the Spanish railway industry has grown from strength to strength creating an ecosystem which is noted for its high degree of internationalisation and innovative technology.

FACTS

- 40% of the world's transport concessions are managed by companies in Spain
- 83% of Spain's rail related products are exported
- Spanish companies are present in 5 continents

CONTACT US NOW

SPEAKING OPPORTUNITIES

Charlie Abrines

T +44 20 8164 3039

E charlie.abrines@terrapinn.com

MARKETING OPPORTUNITIES & PRESS RELATIONS

Lauren Pears

T +44 20 8164 3017

E lauren.pears@terrapinn.com

SPONSORSHIP & EXHIBITION OPPORTUNITIES

Adam Hayward

T +44 20 8164 3072

E adam.hayward@terrapinn.com

CUSTOMER SERVICE

Javed Ahmed

T +44 20 7864 6795

E javed.ahmed@terrapinn.com

Rail Live 2023

Promoting rail on a global scale
Charlie Abrines & Ainara González

Session overview



The banner features the event title 'RAILLIVE!' in large, bold, white and red letters. Above the title are two circular icons representing the flags of Spain and the United Kingdom. Below the title, the text reads 'TECHNOLOGY, INNOVATION & STRATEGY FOR THE ENTIRE RAIL SUPPLY CHAIN'. The dates and location are listed as '29 November - 1 December 2023 | IFEMA, Madrid' and 'Three Day Exhibition & Conference'. At the bottom, there are two yellow buttons: 'RESERVE A STAND' and 'GET FREE TICKETS'.

RAILLIVE!

TECHNOLOGY, INNOVATION & STRATEGY
FOR THE ENTIRE RAIL SUPPLY CHAIN

29 November - 1 December 2023 | IFEMA, Madrid
Three Day Exhibition & Conference

RESERVE A STAND GET FREE TICKETS

- What is Rail Live! - objectives, scale and outreach
- Floorplan, largest sponsors and sponsorship opportunities
- Conference themes, speaker profiles and agenda deadlines
- International outreach
- Networking and learning opportunities
- Event promotion, marketing & attraction



What is Rail Live! - objectives, scale and outreach

Rail Live is Spain's leading rail-focused international conference and exhibition which brings together the global supply chain across 3 days of networking, site-visits, and knowledge sharing. The event covers the full supply chain and addresses issues such as funding & finance, skills & talent, digital transformation, climate change & adaptation, and energy efficiency amongst others. We are proudly supported by MITMA, Renfe, ADIF, ICEX, Comunidad de Madrid, Ayuntamiento de Madrid & Metro de Madrid.

Targets

Speakers: **350**

Stands: **323**

Start-ups: **100**

Academic poster zone: **100**

Hall size: **16,200m²**

Available space for stands: **5,100m²**

Attendees: **7,000-10,000**

Current vs target

Confirmed speakers: **100**

Sold stands: **152**

Confirmed Start-ups: **59**

Academic poster zone: **10**

Hall size: **16,200m²**

Sold space: **2,600m² (152 companies)**

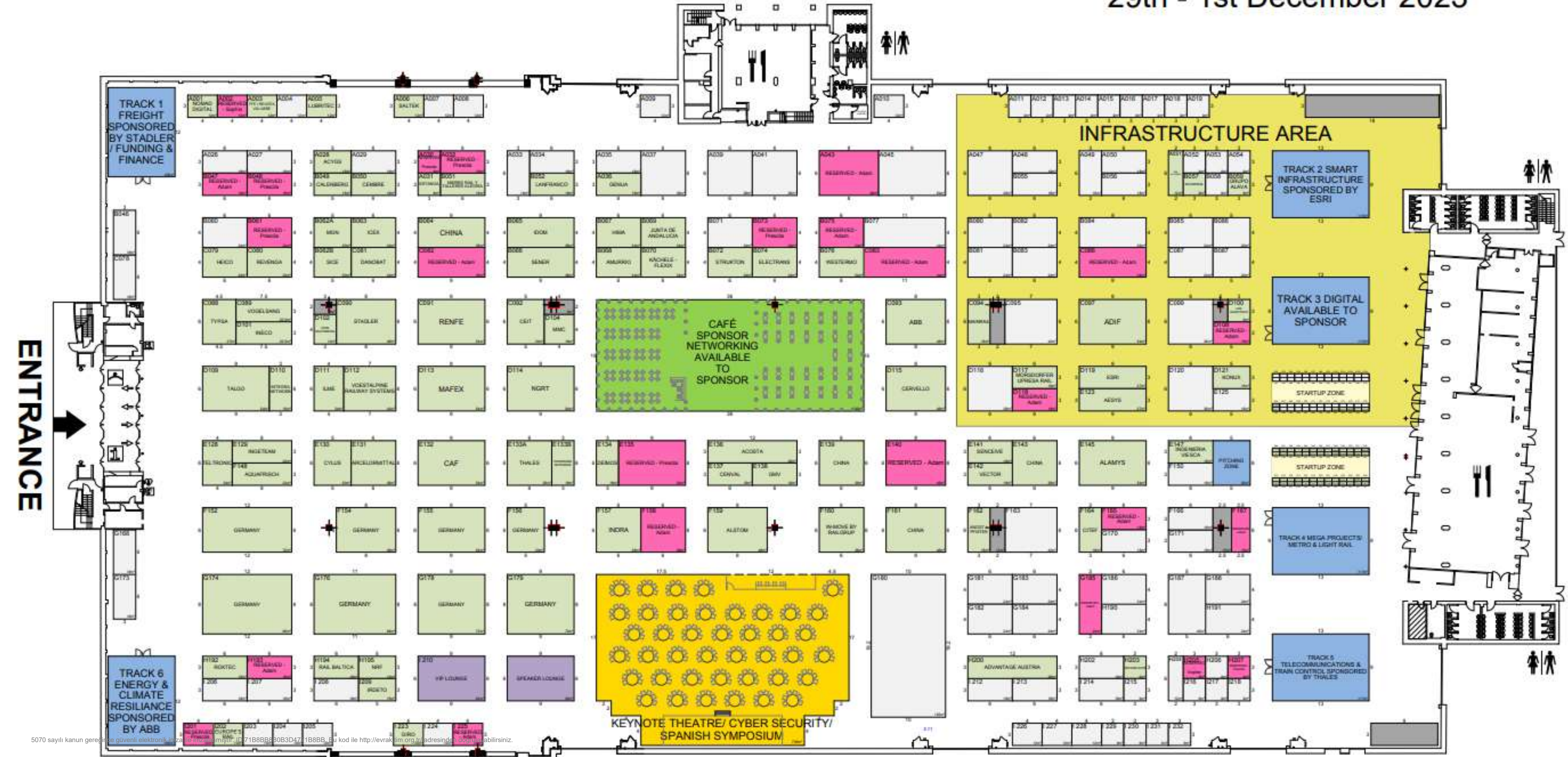
Confirmed attendees: **500**



MADRID

RAILLIVE!

29th - 1st December 2023



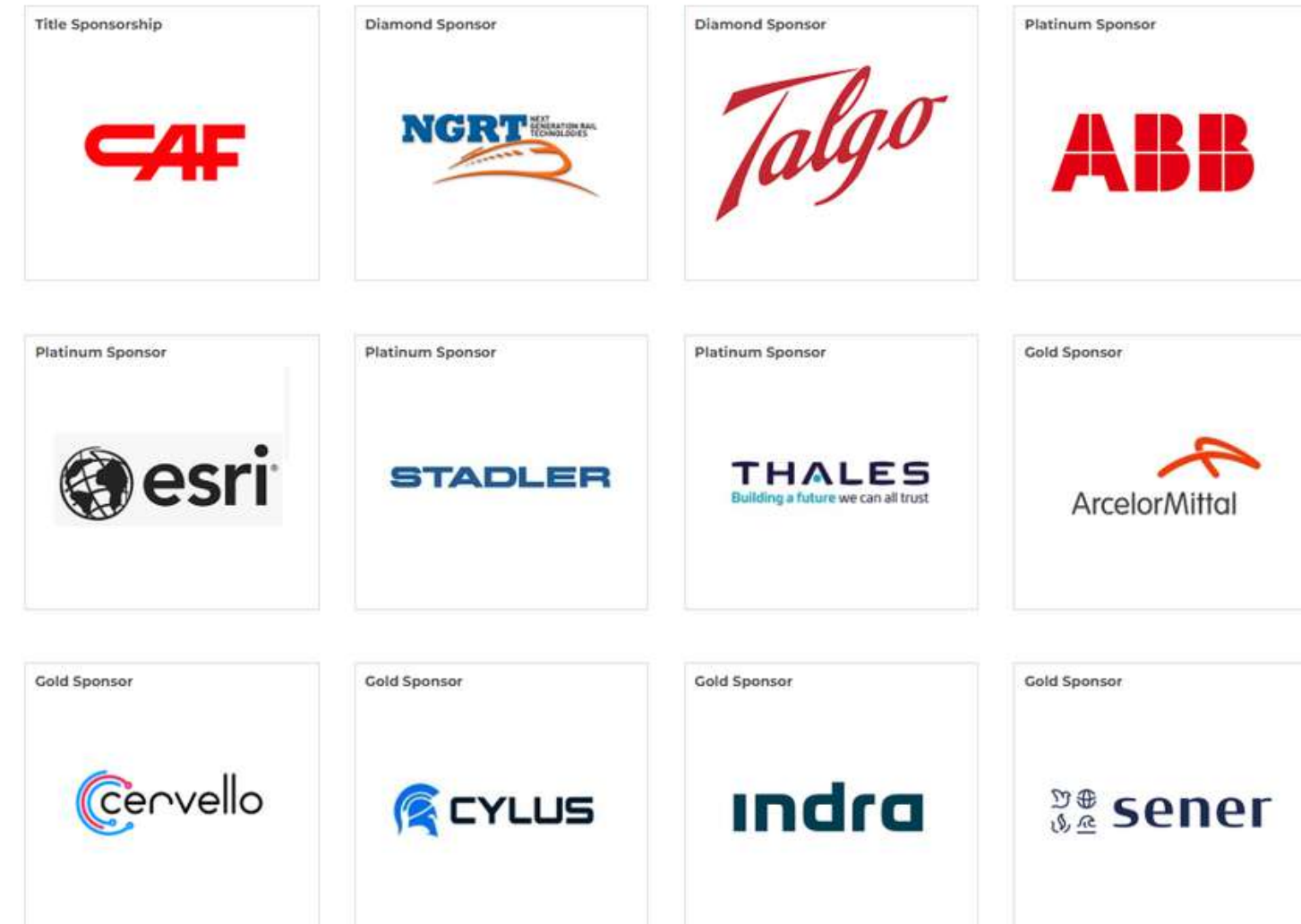
Largest sponsors & strategic partners

- Renfe (Spain): **54m2**
- Adif (Spain): **54m2**
- CAF (Spain): **54m2**
- Talgo (Spain) : **54m2**
- Alstom (France): **TBC**
- AlamyS (9LATAM): **54m2**
- Cervello (Israel): **48m2**
- Stadler (Switzerland): **48m2**
- Saudi Arabia Railways: **48m2**
- Acosta (Spain): **36m2**
- Cylus (Israel): **30m2**
- German Pavilion: **530m2**
- Chinese Pavilion: **150m2**
- Austrian Pavilion: **30m2**

Collaborating Entities



Main sponsors



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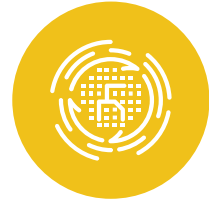
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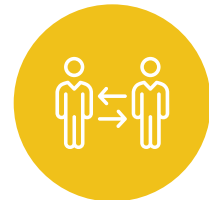
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THEMES & FOCUS

RAILLIVE!

Day 1 – Wednesday 29th November 2023

Official Welcome & Keynotes – THE FUTURE OF RAIL IN SPAIN AND INTERNATIONALLY

Exhibition, Conference, Networking, Start-up Zone, Poster Zone & Refreshments

End of day one & drinks reception



Day 2 – Thursday 30th November

Keynotes & Interviews – SMART INFRASTRUCTURE, SUSTAINABILITY & ENERGY TRANSITION

Exhibition, Conference, Networking, Start-up Zone, Poster Zone & Refreshments

End of day two and drinks reception



Day 3 – Friday 1st December

Keynotes & Interviews – FUTURE TECHNOLOGY, SKILLS, DIVERSITY, & TALENT

Exhibition, Conference, Networking, Start-up Zone, Poster Zone & Refreshments



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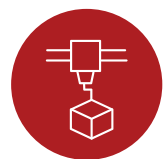
CONFERENCE TOPICS



5G



Accessibility



Additive manufacturing



Advanced Mechanics



Architecture & Design



Artificial Intelligence



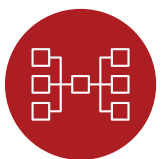
Asset Maintenance



Autonomous Vehicles



BIM



Blockchain



Connectivity



Construction & Engineering



Digital Transformation



Energy & Climate Resilience



Freight



Funding & Financing



Cyber Security



Data Analytics



Digital Analytics



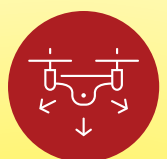
Digital Logistics



Digital Twin



Diversity



Drone Inspection



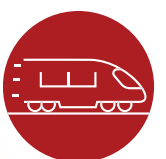
Electrification



Energy & Power



Future Stations



Hydrail



Infrastructure Inspection



Mega Projects



Metro & Light Rail



Safety, Security & Cyber



Signalling & Train Control



IoT



Logistics & Freight



Liberalisation & Competition



Machine Tools



Motive Power



Project Financing



Rolling Stock



Safety, Security & Equipment



Signalling & Train Control



Smart Mobility



Sustainability



Telecommunications



Smart Infrastructure



Smart Mobility



Spanish symposium



Training & Development



SPEAKER PROFILES

RAILLIVE!



MIKE COOPER
Group CEO, Arriva



JAVIER MARTINEZ OJINAGA
CEO, CAF



LEOPOLDO MAESTU
Managing Director, Alstom España



KAROLIS SANKOVSKI
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BRIAN KELLY
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DAS MOOTANAH
CEO, Metro Express



PABLO PASTEGA
Managing Director, Flixbus Spain & Portugal



GONZALO URQUIJO FERNÁNDEZ DE ARAOZ
CEO, Talgo



ADOLFO REBOLLO
CEO, Ingeteam



MANUEL FRESNO
Chief Financial Officer, ADIF



OSCAR PLAYÀ
Director de Metro, TMB



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Member of the Board, KVB



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Director, CINEA



TOBIAS FISCHER
Head of Technology at Teclab, Deutsche Bahn



RICARDO MACHADO
Senior Director of Project Development, Metropolitano de Lisboa



CARSTEN WIEBERS
Global Head Aviation, Mobility & Transport, KfW IPEX-Bank



THOMAS KRITZER
Division Tramway Operation Head, Wiener Linien



DAVID PANG
Treasurer, Corporation Limited MTR



MIGUEL NUÑEZ FERNÁNDEZ
General Director of Collective Transport Infrastructures, Comunidad de Madrid



DAVID BARNETT
Head of Engineering, Rail & Bus, Translink



ÁNGEL MUÑOZ HERNÁNDEZ
Jefe de Servicio - Área de Material Agencia Estatal de Seguridad Ferroviaria



ANGELES TAULER
Gerente PTFE-Subdirectora Estrategia, Innovación y Formación, FFE



RAQUEL CALVO ALLER
Responsable del Área de Gestión Operativa de Líneas, Metro Madrid



JESSICA OUTERIÑO
Directora de Planificación Estratégica de Metro, TMB



DANIEL QUINTERO
Director de Ferrocarriles, GlobalVia



ANDREW MCNAUGHTON
Chairman, Network Rail High Speed



TERESA BENET
Head of International Business Development, Metro Tenerife



STEVE DUCKERING
Head of Operations, UKTram



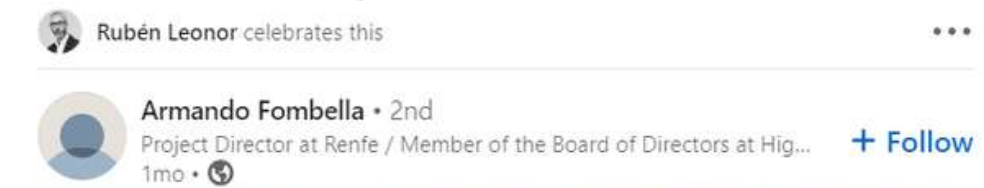
TAMI BULLER
Tel Aviv Metro Planning and Design Director, NTA Tel Aviv



International outreach

Rail Live is the central meeting point for both the Spanish and international railway sector, bringing together operators, infrastructure managers, public transport agencies, industry, academia and financiers.

Given that Spain is a leader in this sector many international companies use Rail Live as an opportunity to benchmark against the likes of Renfe, Adif & MDM whilst also using it as an opportunity to establish business relationships with these given their purchasing power.



El AVE a La Meca de Renfe dispara el tráfico y alcanza al Madrid-Barcelona

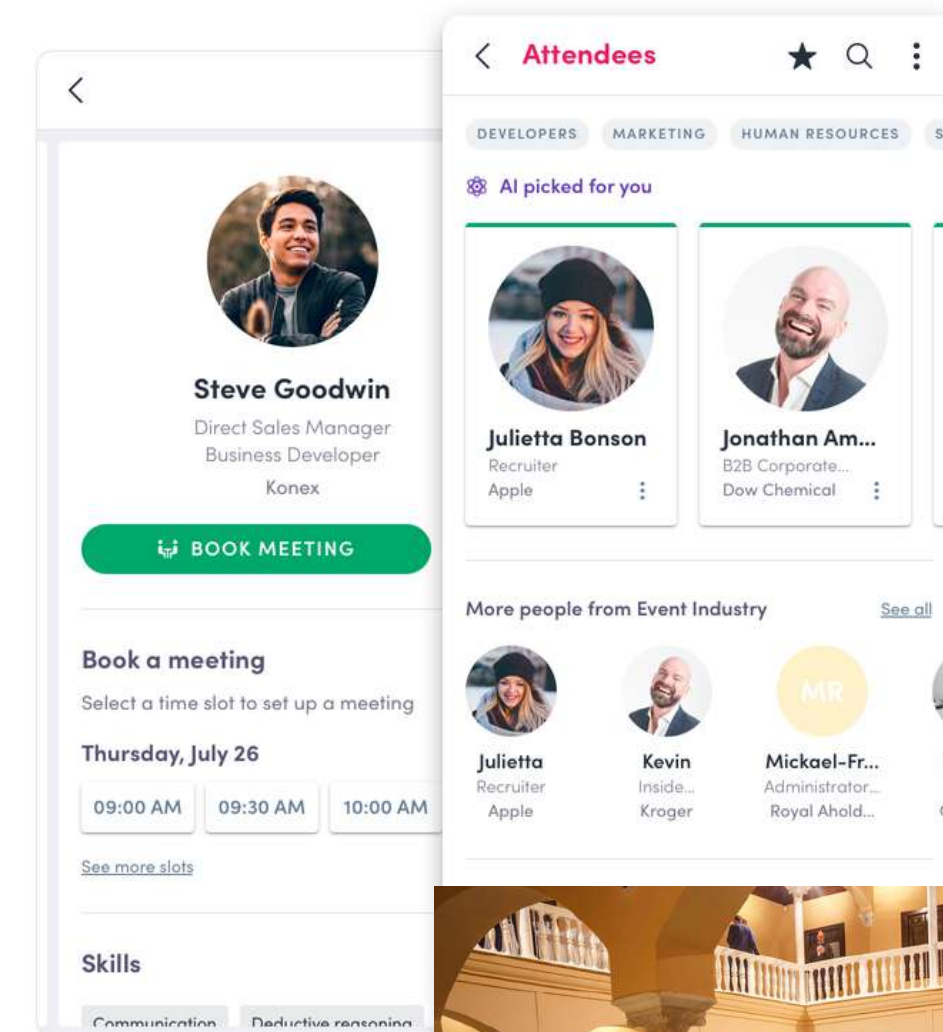


Networking and learning opportunities

Networking is key to Terrapinn events and Rail Live is the perfect opportunity to engage with current business partners and establish new connections.

We facilitate networking through a variety of platform:

- 1 to 1 business meetings (arranged either via the event app or through our dedicated networking team)
- Site visits (these are organised by our strategic partners - Renfe, Adif, MdM & Fundación de los Ferrocarriles Internacionales)
- Drinks receptions (there will be two official drinks receptions for all our VIP delegates. One will take place off-site whilst the other will happen at IFEMA)



Event promotion, marketing & attraction

Channels:

- Email
- Signature banners
- Social media
- Industry journals
- General media

Key dates

- Late May - agenda release and site-visits open
- September - visitor campaign begins to attract 3000-4000 visitors



La expo ferroviaria líder del sector vuelve a Madrid

ÚNETE A ADIF EN RAIL LIVE! 2021

What people can expect when visiting their stand (to add)

Main contact at the stand:

Meet us at Stand 139

PASE GRATIS



STAND 139

VENUE

Pavilion 5
IFEMA, Madrid
Av. del Partenón, N° 5
28042 Madrid, Spain



INECO in Rail Live



➤ INECO's participation

- Attendeessincethebeginningin Bilbao
- Sponsors withstand in Madrid

• Engineering partner

➤ Institutional support

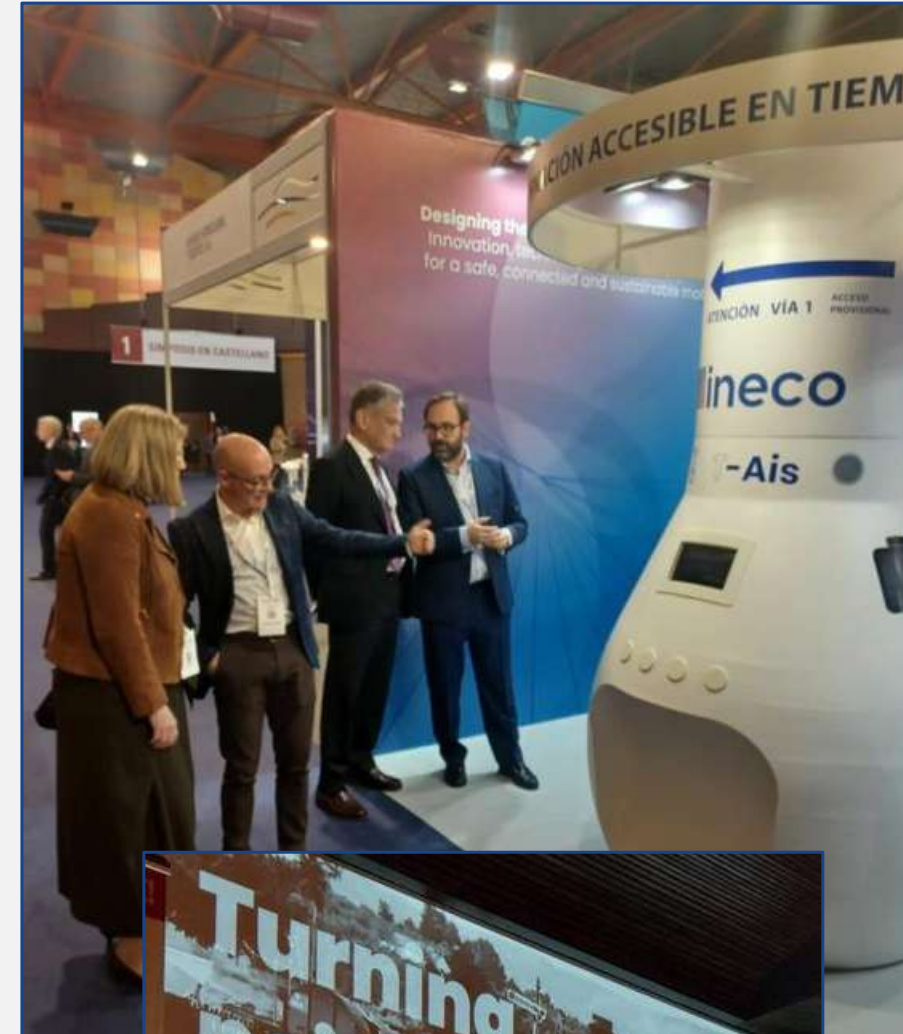
- Ineco's shareholders: ADIF and RENFE
- Ministry of Transport
- MAFEX –ImportanceofSpanish Railway Industry

➤ Knowledge hub

- Conferences, techincalsessions
- Universitiesand educationalinstitutions
- Innovationsand new trends

➤ International exposure

- Networking: administrators& managers, operators, manufacturers& suppliers, engineering& consultancyfirms
- Business opportunities



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RAILLIVE!

CAF

**TRUST
IN MOTION**

QUESTIONS?