

# Annual Report 2012-2013



COMMUNITY OF EUROPEAN RAILWAY AND INFRASTRUCTURE COMPANIES

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# FOREWORD

**The past year was dominated by the Fourth Railway Package.** The technical pillar of the package in conjunction with generalised open access rights, will mark an important step forward for the Single European Railway Area. However, the principle of subsidiarity with respect to public service obligations and governance matters needs to be defended.

Adopted by the European Commission on 30 January, the Fourth Railway Package has three pillars: governance of the railway system, market opening, and a technical pillar. CER welcomes the technical component and the generalised open access rights. However the governance and PSO-related proposals lack justification, both economically and with respect to the legal principles of proportionality and subsidiarity. Frequent changes to the regulatory framework in last twenty years have substantially increased railway business risks. After the Fourth Railway Package is adopted, CER expects a regulatory pause for the following five to ten years.

The introduction of the Fourth Railway Package provides an opportunity to take stock of both positive and negative developments and to assess the effectiveness of measures introduced over the last decade to reinvigorate rail freight. In April this year, CER released a report which demonstrated that, although various policy measures and instruments have been introduced during the last decade with a view to reinforcing the competitiveness of rail freight, the overall impact of the measures has been very limited.

CER also paid great attention to the way the Recast of the First Railway Package would be implemented. The European Commission and the member states are invited to provide more details on how a number of critical aspects of the legislative text (noise and ETCS charging, economic equilibrium of public services, methods for calculating direct costs, etc.) will be implemented. These aspects will significantly shape the way rail business will be done in future years.

On another important subject, CER has been closely following the discussions on the European Commission's proposal for the Trans-European Transport Network (TEN-T) Guidelines and the Connecting Europe Facility (CEF) financial instrument linked to it. The TEN-T Guidelines set the strategic framework for transport infrastructure investment until 2050 and we are convinced that the TEN-T proposal will only be meaningful if it is backed by adequate funding. That is why we urge EU member states and the European Parliament to safeguard sufficient funding for transport infrastructure in the 2014-2020 budget.

Intermodal competition is just as important as intramodal competition. CER is very keen on the European Commission's proposal on the issue of road infrastructure charging for direct as well as external costs. This proposal is expected to be adopted in 2013. Furthermore, CER will keep a close eye on a new proposal to formalise the cross-border traffic of longer and heavier vehicles (LHVs, or 'megatrucks') between neighbouring countries. This proposal was published by the Commission in April this year.

As from July 2013, Croatia will join the EU: the Union will be even more diverse. CER's contacts will become more numerous and varied. The association has had a number of members with headquarters in Zagreb for some years. It looks forward to continuing its good work.

All these activities are associated with a single objective. With the help of our members, our goal is to complement the EU institutions and national governments – providing reliable input which is both critical and supportive at the same time. We will only succeed in our tasks if we work closely together with our members, the European institutions and national governments. We would like to use this opportunity to thank you for all your continued support of European rail transport throughout 2012.



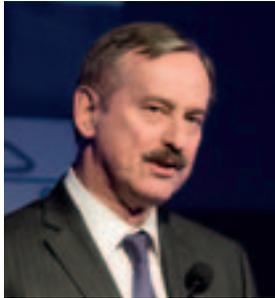
Mauro Moretti  
CER Chairman



Libor Lochman  
CER Executive Director

# Guest contribution by Siim Kallas

*Vice-President of the European Commission responsible for transport*



Europe's railways are on the brink of perhaps the most radical change in their history. People have dreamed of creating a unified railway in Europe ever since the start of modern train travel. Never have we been closer to making that dream a reality.

With more than 8 billion passenger journeys made by train each year, rail is the obvious choice to shift passenger and freight traffic away from congested roads. It has the in-built advantages of low land use, high energy efficiency and ability to run off clean fuels. Using rail more will help the EU to meet its wider climate change targets, especially since demand for transport is likely to grow further in the years ahead.

Unfortunately, too many of our railways today are in decline, swallowing more and more public money to keep running. Rail's share of European passenger transport is stable at just 6%. Freight's share of inland transport has fallen from 18.5% in 2000 to 16.2% today. Since 1990, the EU's rail network has shrunk by 6%.

Today, rail is a split and fragmented sector. It has to cope with diverging national rules, standards and a history of protected markets. More than 20 years after the first EU rail initiative, we still do not have a genuine internal market for railways.

We need to do something urgently to support and re-generate Europe's railways so that they achieve their full potential.

The European Commission's proposals on interoperability, market access and governance will put the regulatory structure in place that we need. They continue along the EU's existing path of gradual liberalisation as the means to promote rail's efficiency and competitiveness.

For rail to thrive, there must be a genuine single market. It should be possible to build a train to certain European standards, and then certify it to run everywhere in the EU. Today, that is prevented by our highly decentralised system, and worsened by compatibility problems arising from so many vehicle types, a bewildering array of technical and safety rules, and technical barriers such as different track widths and electricity systems.

It can also be a lengthy and costly process to get rolling stock authorised. This means that expensive new equipment sits idle for long periods for no good reason.

None of this helps to bring more innovation and new services into Europe's rail services, where one of the largest single barriers is access to rolling stock, particularly for newcomers.

Our proposal aims to reduce the cost and time taken to approve rolling stock, which should be built to a single set of standardised rules and receive a single EU certificate.

Rail markets need to be opened so that operators can offer domestic passenger services across the EU. At the same time, however, we need to put a strong mechanism in place to get public authorities to design effective public service obligations, looking closely at their longer-term needs. Public authorities will also play a key part in ensuring effective tendering processes – because it is today's lack of alternatives to existing operators that is a main reason why rail services are often of a lower quality and efficiency than they should be.

Competitive tendering will create a strong incentive for rail to perform better. It will introduce innovation to improve passenger services, which will then attract more customers. It will ensure optimal value for public money and proper compensation to railways for their services.

To make sure that the network is developed fairly in everybody's interests, we need strong infrastructure managers at the heart of Europe's railways. They have to be able to control, independently and neutrally, all essential functions related to managing networks – such as infrastructure charging and maintenance, renewal, upgrade and development; day-to-day traffic management and allocation of rail capacity.

The simplest and most effective way to ensure fair competition is to have a degree of institutional separation, with non-discriminatory rights for access to infrastructure. We have also proposed an option for retaining integrated structures during a transition period, because they can also deliver the necessary independence. But for this, there must be strict safeguards to ensure genuine legal, financial and operational separation, and no cross-subsidisation of transport operations with funds earmarked for infrastructure.

I know some in the rail industry view our proposals as a threat: unnecessary intervention by Brussels. They are mistaken. These changes are a vital – perhaps a last – new opportunity. If rail is made more attractive, this will lead to more traffic growth, more employment opportunities and better conditions.

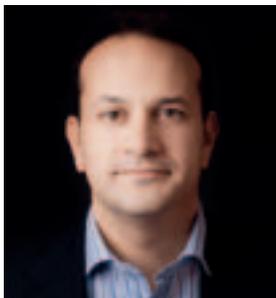
If we can unleash rail's true potential, and raise the quality of service so that it becomes a real and attractive alternative, that benefits everyone: the rail industry, freight businesses – and above all, passengers.

Siim Kallas

*Vice-President of the European Commission*

# Guest contribution by Minister Leo Varadkar

## *The Irish Presidency – placing the cornerstone of the Fourth Railway Package and future rail market reform*



The Irish Presidency is overseeing the new round of discussions on the future direction of Europe's railways. Significant progress has already been made in setting up a Single European Railway Area, and the Fourth Railway Package is a good opportunity for Europe to take this further.

The Recast First Railway Package Directive has now been finalised. We can now move on to the next stage in the form of the Fourth Railway Package. The discussions and debates which took place throughout 2012 on the Recast Directive have highlighted the challenges which lie ahead for the Europe's railways, which are going through a period of significant re-structuring and reform.

Ireland has been preparing for the end of our long-held derogation from the market aspects of the First Railway Package. The reform of Ireland's railways will see our national rail company being re-organised, the creation of an independent rail regulator, and new safeguards to ensure non-discriminatory access to the market.

In Ireland's case, we need to maintain a fine balance between ensuring that our railway can benefit from the single European railway, while ensuring that the changes reflect the characteristics and capability of the rail network in Ireland.

There is clearly a great deal of interest in the Fourth Railway Package proposal. The Irish Presidency is making progress on the technical aspects of the Commission's proposals, particularly in terms of railway interoperability. Overcoming the technical barriers by harmonising standards, and streamlining authorisation procedures, will create the right conditions for the sort of market reforms which are designed to achieve a fully-integrated rail system in Europe.

To date, the Irish Presidency has focused on recasting the Interoperability directive, which is regarded as a cornerstone of the Fourth Railway Package. A more central role for the European Railway Agency and the streamlining of processes, such as placing vehicles into service, has the potential for a much speedier approval process, especially for those vehicles travelling on international routes crossing several member states.

At the Council of Minister's meeting on 11 March, member states discussed the potential future roles and responsibilities of the European Rail Agency and National Safety Authorities in the context of the draft proposal. Member states broadly welcomed the initiative and voiced their support for the harmonisation of interoperability and safety standards in order to make rail a more attractive option.

The Fourth Railway Package also deals with more politically sensitive issues such as the competitive tendering of contracts for public service obligations, further opening domestic railway markets, and further structural reform. These matters are complex and show the diverse structural, demographic and market conditions that characterise the European rail system. That's why Ireland is using the Presidency to achieve consensus on those elements of the Fourth Railway Package where the objectives across the EU are most closely aligned, and where we believe tangible benefits can be achieved.

The core aim of the European proposals for a Single European Railway area is to allow railways to compete with other transport modes for market share in both passenger and freight transport. This requires railways which can deliver a high quality, reliable and efficient service that is also environmentally friendly. The focus of the Irish Presidency on removing administrative and technical barriers will pave the way for the future discussions on the further opening of railway markets.

Leo Varadkar  
Irish Minister for Transport, Tourism and Sport



## The voice of European railways

CER has been recognised as the voice of European railways for twenty-five years; CER represents the interests of its eighty-two members by making inputs to EU policy. It delivers practical and reliable information to EU stakeholders, in particular **to support an improved business and regulatory environment** for European railway and railway infrastructure companies.

The Community of European Railway and Infrastructure Companies (CER) is the leading European railway association. It was founded in 1988 with twelve members and now brings together **eighty-two railway undertakings, infrastructure companies and vehicle leasing companies**, including long-established bodies, new entrants and both private and public-sector organisations.

**CER members represent about 71% of the rail network length, more than 85% of the rail freight business and over 96% of rail passenger operations in EU, EFTA and EU accession countries. CER members have directly created more than a million jobs .**

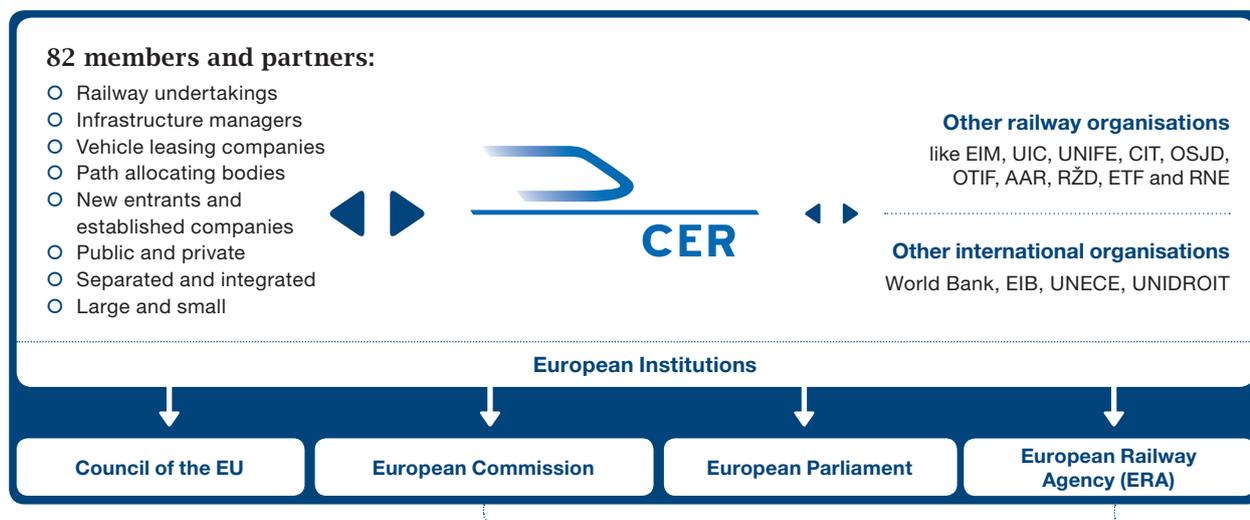
Geographically, CER members come from the European Union, Norway and Switzerland, the Western Balkan countries and Turkey. Among these eighty-two companies, seventy-seven have full or associate membership status and five enjoy partnership status.

### Lobbying by quality

CER is based in Brussels and represents the interests of its members to the European Parliament, European Commission and Council of Ministers, as well as to other policy-makers and transport stakeholders. CER's objectives are **to contribute to a regulatory environment enhancing business opportunities for European railway and railway infrastructure companies.**

CER's interests cover all policy areas that have the potential to impact transport by rail. CER monitors and evaluates the implementation of policies in close cooperation with its members. Through our permanent dialogue with policy-makers we propose new legislation and amendments to the existing law to address ongoing problems.

Figure 1: Who we work with



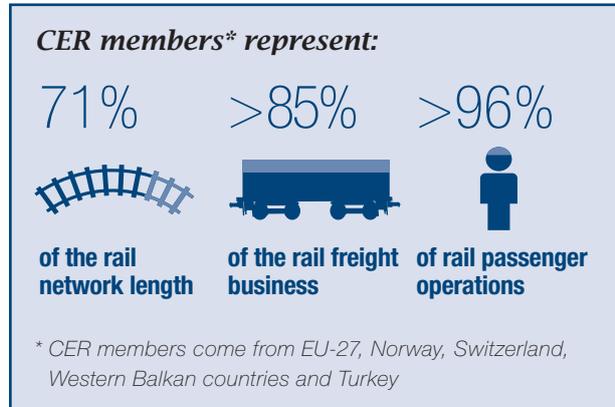
## Communicate the railways

Communication is the key to CER's activities. CER uses a **wide range of communication tools** to inform the European institutions, journalists, CER members and other important stakeholders about the sector's position and activities.

The main challenges for communications are building CER's reputation as a competent and reliable partner and bringing the railway message to the fore in a differentiated environment.

Good relations with the media and presentations are used to raise awareness of the CER's position on individual issues, whilst publications provide essential information on many fundamental issues. Internal communications tools, like the weekly newsletter, *CER Monitor*, keep CER members up to date on recent transport developments in the EU. In addition, the *CER Technical Monitor* informs members about ERA-related activities, the *CER Environment Monitor* focuses on rail-related environment issues and the newly established *Legal Monitor* informs about relevant cases in the field of legislation.

The CER website ([www.cer.be](http://www.cer.be)), which is regularly updated, provides easy access to position papers, brochures, press releases, events, fact sheets and much more. CER's latest publication *Rail Freight Status Report 2013* assesses the status of rail freight after a decade of EU rail policy. The newly created website [www.europeanrailwayaward.eu](http://www.europeanrailwayaward.eu) provides useful information about the European Railway Award which was initiated by CER in 2007 and is jointly organised with UNIFE.



Source: CER statistics

## Dialogue with partners

CER constantly strives to be a **reliable, competent and committed partner**, building stable relationships based on active and transparent dialogue between the sector and the European institutions. To achieve this, we are fostering a common and united European railway community.

Other rail organisations are regularly invited to **participate in CER working groups**. Discussions on infrastructure, freight, and passenger issues are frequently held between CER experts from the Brussels office and CER members and representatives from the European Rail Infrastructure Managers (EIM), the International Union of Railways (UIC), the Association of the European Rail Industry (UNIFE), the International Union of Wagon Keepers (UIP) and the International Union of Public Transport (UITP). Recent activities have also led to close co-operation between rail associations on technical issues. Since its creation by the EU in 2004, the European Railway Agency (ERA) has become another key partner in most technical harmonisation issues.

CER also maintains close relationships with the European Federation of Railway Trackworks Contractors (EFRTC), the European Transport Workers' Federation (ETF), the International Union of combined Road-Rail transport companies (UIRR), RailNetEurope (RNE), the International Rail Transport Committee (CIT), the European Centre of Employers and Enterprises providing Public Services (CEEP) amongst others. On specific issues, CER liaises with non-rail organisations too, including NGOs, such as Transport and Environment (T&E), road lobbying organisations, such as the International Road Transport Union (IRU) or the European Association with tolled motorways, bridges and tunnels (ASECAP), as well as financial bodies, such as the European Investment Bank (EIB), the World Bank (WB) and the European Bank for Reconstruction and Development (EBRD).

## The European Railway Award 2013

Jointly organised by CER and UNIFE, the European Railway Award 2013 was presented on 26 February to **Benedikt Weibel**, former CEO of the Swiss Federal Railways (SBB), for political achievements and to **Dr Johannes Nicolin**, Technical Director, AAE Holding AG, for technical achievements. The European Railway Award 2013 attracted more than 500 guests from all over Europe, including high-level politicians and transport stakeholders.

Keynote speaker of the gala evening was **European Commission Vice-President Siim Kallas**, who outlined key points of the recently released Fourth Railway Package. In his speech, he highlighted that “Europe’s railways are on the brink of perhaps the most radical change in their history”. Representing the European Parliament, **MEP Brian Simpson (S&D, UK)**, Chairman of the Committee on Transport and Tourism, remarked that “this Fourth Railway Package is an important piece of legislation for the future of European railways”.

### Political Award

Political Award Winner **Benedikt Weibel** had a major influence on the strategic direction of the Swiss Federal Railways in his fourteen years as CEO. Under his leadership, the density of trains per line kilometre increased by 25%.

In his laudatory address to Benedikt Weibel, **Moritz Leuenberger**, former Swiss Transport Minister and laureate of the European Railway Award 2009, said: “Benedikt Weibel has devoted his whole personality to the railways. He perfectly understands that railways are all about the people who use them. No public support, no railways.”

### Technical Award

The laureate of the Technical Award 2013 **Dr Johannes Nicolin**, was introduced by **Fernand Rippinger**, CEO, CFL Cargo. Dr Nicolin served as Director of Engineering for wagons and bogies at Waggonfabrik Talbot in Aachen, before he became Technical Director at AAE (Ahaus-Alstätter Eisenbahn AG). His impressive range of innovations, especially in intermodal wagons, helped to increase the customer value by reducing maintenance costs and enhancing handling efficiency. Johannes Nicolin always sought the overall improvement of rail freight competitiveness and system optimisation that went beyond the interests of a single company.



*From left to right: CFL Cargo CEO Fernand Rippinger, Technical Award Winner Johannes Nicolin, MEP Brian Simpson, European Commission Vice-President Siim Kallas, CER Executive Director Libor Lochman, CER Chairman Mauro Moretti, UNIFE Director-General Philippe Citroën, Political Award Winner Benedikt Weibel, UNIFE Chairman Henri Poupart-Lafarge, former Swiss Transport Minister Moritz Leuenberger*

The European Railway Award regularly honours outstanding political and technical achievements in the development of economically and environmentally sustainable rail transport. The award comes with prize money, which is donated to charity organisations of the laureates’ choice. The jury for the European Railway Award 2012 consisted of CEOs of rail and rail industry companies as well as stakeholders from the transport sector and the EU institutions.

Pictures of the European Railway Award 2013 and the CER and UNIFE Annual Reception are available on the [www.europeanrailwayaward.eu](http://www.europeanrailwayaward.eu) website.

## The European Railway Award – History

The European Railway Award was initiated by CER in 2007. It is now organised jointly with the Association of the European Rail Industry (UNIFE).

### European Railway Award winners:



Political Award Winner 2007  
Karel van Miert  
Former EU Commissioner  
responsible for transport



Technical Award Winner 2007  
Jean Dupuy  
Former Director General of SNCF



Political Award Winner 2009  
Moritz Leuenberger  
Former Swiss Transport Minister



Technical Award Winner 2009  
Bengt Sterner  
Inventor of the electronic train  
control system ETCS



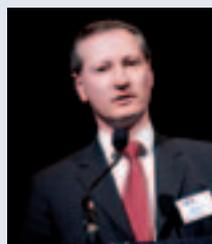
Political Award Winner 2010  
Felipe González  
Former Spanish Prime Minister



Technical Award Winner 2010  
Roland Heinisch  
Former Member of the Board of DB  
and former Chairman of DB Netz



Political Award Winner 2011  
Ken Livingstone  
British Labour politician and  
former mayor of London



Technical Award Winner 2011  
Stefan Haas  
Managing Director Knorr Bremse  
Austria



Political Award Winner 2012  
Karel Vinck  
European ERTMS Coordinator



Technical Award Winner 2012  
François Lacôte  
Senior Vice President and  
Technical Advisor Alstom



Political Award Winner 2013  
Benedikt Weibel  
Former CEO of the Swiss  
Federal Railways (SBB)



Technical Award Winner 2013  
Johannes Nicolin  
Technical Director,  
AAE Holding AG

## European Railway Award 2013 - Picture gallery



*CER Chairman Mauro Moretti*



*Benedikt Weibel, awarded in the political category*



*Joint CER-UNIFE Annual Reception*



*Dr Johannes Nicolin receiving his prize*



*Slim Kallas keynote speech*



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## Recovery in rail traffic interrupted as economy worsens

A survey<sup>1</sup> conducted by CER shows that the performance of the European rail sector declined in 2012. Whilst the European rail passenger sector experienced a small decline of 0.6%, European rail freight operators saw their performance decrease by 6.8% compared to 2011. This decline follows two years of sustained growth in both markets, especially in freight, as they recovered from the impact of the economic crisis in late 2008.

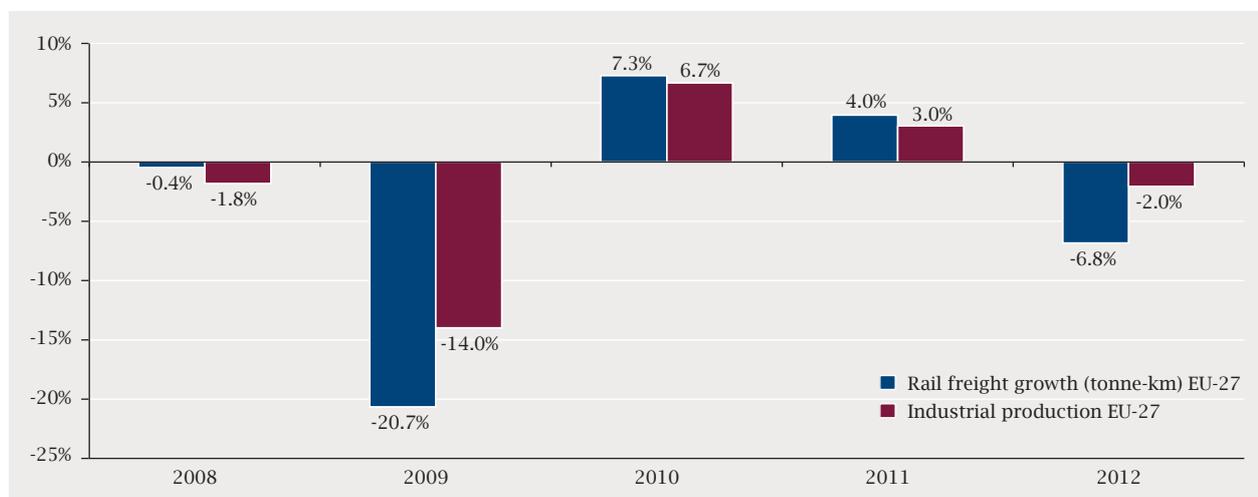
### Decline in rail freight performance across Europe

Following the economic crisis which struck Europe in late 2008 and continued throughout 2009, rail tonne-kilometres grew again in 2010 (+7.3%) and 2011 (+4%). The results for the full year 2012 show, however, that this recovery came to a halt in 2012. As indicated in Figure 2, tonne-kilometres in Europe in 2012 decreased by 6.8% compared to 2011 and thus fell more strongly than industrial production<sup>2</sup>, which declined by 2% compared to the previous year. The decline

was more pronounced in the second half of 2012, in which tonne-kilometres fell by 7.5% compared to a drop of 6.2% in the first half.

As shown in Figure 3, tonne-kilometres in the EU-15 (+CH) decreased by 6.3% in 2012 compared to the previous year. The decline was slightly higher in the CEEC, where tonne-kilometres decreased by 7.9% over the same period. Figure 4 shows that compared to October 2008, the month before the first impact of the crisis hit the rail freight sector, tonne-kilometres in October 2012 were 15.8% lower in EU-15 and 18.2% lower in CEEC.

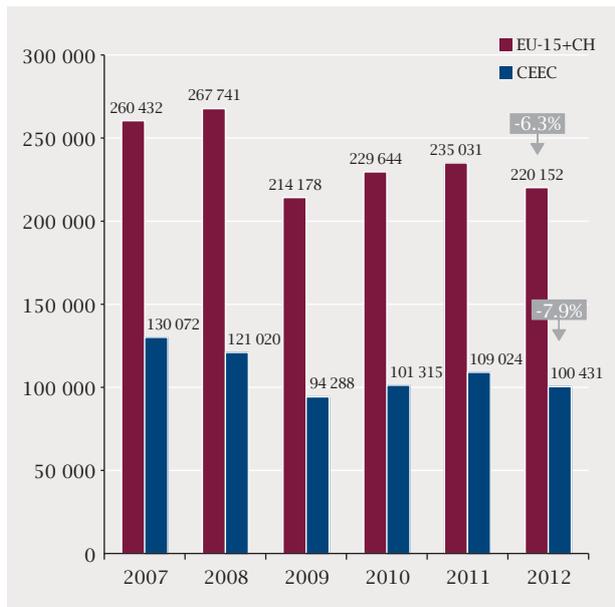
**Figure 2: Annual rail freight (in % based on tonne-km) and industrial growth (%)**



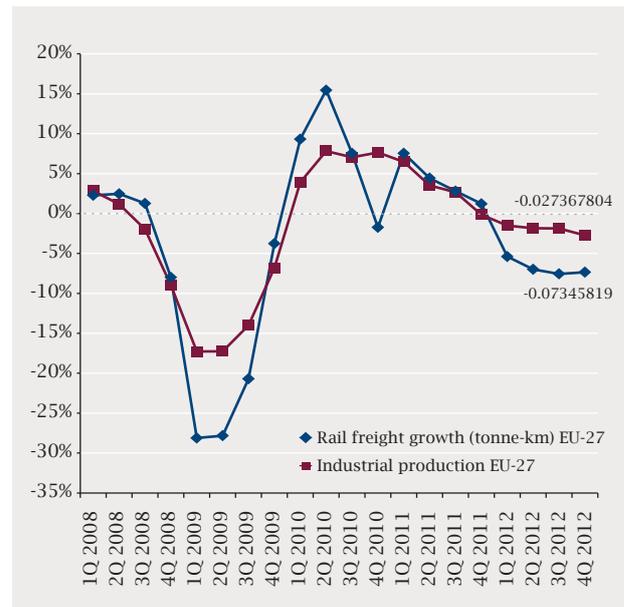
<sup>1</sup> CER conducts regular surveys among its members on the performance of rail passenger and freight sectors

<sup>2</sup> Industry Production Index (which includes mining and quarrying, manufacturing, electricity, gas, steam and air conditioning supply), Eurostat, April 2013

**Figure 3: Annual rail freight development in Europe (million tonne-km)**



**Figure 4: Monthly rail freight development (million tonne-km)**



**Decrease in rail passenger traffic in CEEC**

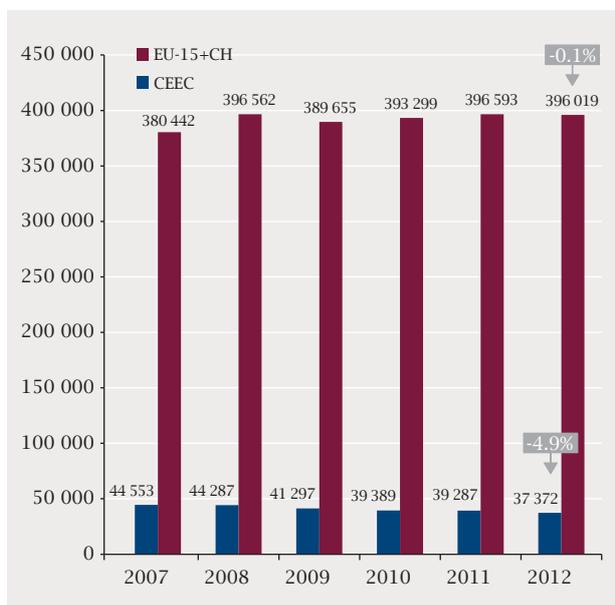
The performance of the rail passenger sector in Europe stagnated in 2012. Compared to the previous year, passenger-kilometres in Europe decreased by 0.6% in 2012. During the same period, the unemployment rate<sup>3</sup> for the EU-27 increased by 8%, from 9.7% in 2011 to 10.5% in 2012.

As shown in Figure 5, passenger-kilometres in EU-15 declined slightly by 0.1% in 2012 compared to 2011. This follows a long period of continued growth, which was only interrupted in 2009 as a result of the economic crisis.

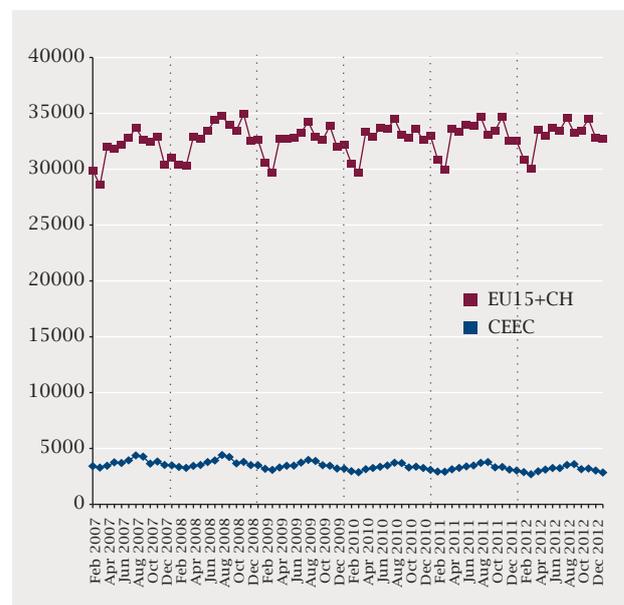
Despite some improvements in the CEEC rail passenger market last year when passenger-kilometres fell by only 0.3%, an achievement compared to previous years, this upward trend could unfortunately not be sustained in 2012. Rail passenger-kilometres in CEEC declined by 4.9% in 2012.

For both regions of Europe, the rail passenger sector was slightly better in the second half of 2012 than in the first (see Figure 6), possibly indicating that the decline in passenger-kilometres will not continue into 2013.

**Figure 5: Annual rail passenger development (million passenger-km)**



**Figure 6: Quarterly rail passenger development (million passenger-km)**



<sup>3</sup> Unemployment rate, Eurostat, April 2012

## CHAPTER 2

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## The Fourth Railway Package

**The European Commission adopted the Fourth Railway Package on 30 January 2013.** The Package consists of three pillars: governance of the railway system, market opening, and a technical pillar. CER welcomes the proposals for new technical approval procedures (technical pillar) and generalised open access rights. However the governance and PSO-related proposals lack justification, both in economic terms and with respect to the legal principles of proportionality and subsidiarity.

The European Commission adopted its proposals for a Fourth Railway Package on 30 January 2013. The Package proposes modifications concerning a number of legislative acts:

- The Recast directive, with proposed measures on the governance of the railway sector (in particular vertical separation) and on open access competition (generalisation of access rights to include domestic passenger markets);
- The PSO regulation, with proposed measures on public service obligations (including the introduction of transport plans, the imposition of open tendering, and the definition of size thresholds for PSO contracts);
- The interoperability directive, the safety directive, and the ERA regulation, with proposed measures to streamline the authorisation of railway vehicles and the safety certification of railway undertakings, based on an extension of the role of the ERA;
- Repeal of regulation 1192/69 on the normalisation of accounts of railway undertakings.

### Recast Directive

The Commission's proposed amendments to the Recast directive (Directive 2012/34/EU), which entered into force in November 2012, are of two main types: extremely strict new separation requirements between infrastructure managers and railway undertakings; and market opening measures in the sense of granting access rights for all types of domestic and international passenger services. In line with its very clear positions, CER has naturally welcomed the latter while strongly rejecting the former.

CER's views on structural models are clear: there is a diversity of organisational models in Europe, and this diversity should continue to be allowed under EU law, including in particular both the right to opt for full vertical separation, and the right to

move away from it. According to a comprehensive study on the economic effects of vertical separation that was commissioned by CER in 2012, full separation is not a necessary condition for successful market opening and there is no evidence that it leads to higher market entry, to a higher modal share for rail, or to better value-for-money for state budgets. Unfortunately, CER's views on this issue were disregarded by the Commission, in spite of sincere efforts to explain and document the lack of a sufficient evidential basis for a 'one-size-fits-all' policy – a problem that the Commission's relevant Impact Assessment fails to address.

### ***EVES-Rail study***

A study by an international consortium of transport economists has concluded that no particular structural model outperforms all others. No evidence that competition within the rail sector works better with vertical separation than with a holding company was found. The EU should therefore opt for a policy of free choice of structural model for the rail sector. The EVES-Rail study (Economic Effects of Vertical Separation in the Railway Sector) was carried out by an international research consortium headed by Inno-V (Netherlands) and included researchers from the Institute for Transport Studies at the University of Leeds (UK), the Free University of Amsterdam (Netherlands), Civity Management Consultants (Germany), and the universities of Kobe and Fukuyama Heisei (Japan). EVES-Rail was commissioned and financed by CER and is available at [www.cer.be](http://www.cer.be).



On 21 January, CER and the Irish Presidency of the European Union held a joint event in Brussels on the Fourth Railway Package. Ireland's Transport Minister, Mr Leo Varadkar, gave the keynote address. CER Executive Director Libor Lochman gave the welcome speech. The goal of the event was to highlight the needs and expectations in small and/or peripheral member states. Mr Leo Varadkar as well as Mr Richard Fearn, former CEO of Irish Rail, provided important insights from the Irish perspective. MEP Roberts Zile (ECR, Latvia) as well as contributions from the audience provided important insights into the situation in the Baltic States, and Mr Erich Forster, CEO of WESTbahn, presented the experience of a new entrant in Austria.

*From left to right: CER Executive Director Libor Lochman, Irish Minister of Transport Leo Varadkar, former Irish Rail CEO Richard Fearn*



The market access part of the proposal amending the Recast directive is, by great contrast, nearly identical to the views defended by CER in its position paper of September 2012. Essentially, open access rights should be universally adopted, to be limited only in case the economic equilibrium of PSO services is compromised. CER welcomes that part of the proposals, and wishes to suggest some adjustments that would facilitate market access even further.

## PSO Regulation

The Commission's proposal amending the PSO Regulation is centred on making open tendering the only accepted award mechanism for public service contracts (with only very limited exceptions), with accompanying measures designed to create a 'liquid market' by limiting the size of public service obligations and by imposing support measures with respect to rolling stock procurement. While the Commission's proposal might be well-intentioned, CER considers that the proposal is problematic in several key aspects.

First, while tendering is an important and useful mechanism that must be available to competent authorities, there are many more cases than those identified by the Commission where direct award can be effective. Second, there are serious doubts about the adequacy of the Commission's quantitative estimates regarding size thresholds. Third, and more fundamentally, CER considers that the proposals run against the legal principles of subsidiarity and proportionality and that, by way of consequence, they are not in conformity with the Treaty. Finally, one could even question whether this is the right time to propose amendments to this Regulation. While the Regulation came into force in late 2009, its concrete application is much more recent, and so there is a lack of experience and empirical data regarding its effects. More time would be needed in order to allow for an objective analysis of the need for further measures.

Available evidence suggests that it is possible to achieve high levels of service quality and passenger satisfaction both with and without tendering as the principal mechanism. Furthermore, there are major structural differences between member states, in particular due to the effect of country size. The Commission's analysis does not make any attempt to determine the optimal size of PSO contracts, save from the viewpoint of facilitating market entry in a tendering context. Efficiency considerations

### Joint position paper

The published dissemination material highlights CER's, UNIFE's, ERFA's and UIP's position how to shape the future European Railway Agency.



and network effects have not been sufficiently analysed, raising serious questions about the adequacy of this proposal.

### CER supports the Fourth Railway Package's technical pillar with the following key principles:

- Single European vehicle authorisation;
- European approach to safety certification;
- ERA as one-stop-shop and supervisor of procedures;
- ERA fully responsible for vehicle authorisation issued;
- Evolutionary approach towards European vehicle authorisation;
- Applicant to choose the area of use;
- Area of use fully covered by vehicle authorisation (technical compatibility).

### Technical pillar

The proposals aim at streamlining and accelerating the processes for the authorisation of railway vehicles and for the safety certification of railway undertakings, based on a stronger role of the European Railway Agency (ERA). CER, UNIFE, ERFA and UIP drew up a joint position paper on the new role of the ERA. In order to achieve a single European railway area CER and its partners call for a medium term target to set up a single European railway vehicle authorisation process. This would dismantle administrative and technical barriers and develop easy and common (member state neutral) procedures at European level.

## Interoperability

The present Interoperability Directive sets the conditions to be met to achieve interoperability within the Union's rail system by aiming to facilitate, improve and develop international rail transport services within the European Union and with third countries.

The high costs, long timescales and uncertainty of the various national authorisations require a simplified, harmonised and structured **European** approach. CER supports the objective to reduce the number of national rules and converge progressively toward a set of European interoperable rules.

## Safety

The present Safety Directive lays down provisions to ensure the development and improvement of safety of the Community's Union's railways and improved access to the market for rail transport services.

The long duration and uncertainty of the processes leading to issuing safety certificates require a simplified, harmonised and structured **European approach**. CER supports the objective to migrate towards a single safety certificate.

## ERA Regulation

The progressive establishment of a European railway area without frontiers requires Union action in the field of the technical regulations applicable to railways with regard to the technical aspects (interoperability) and the safety aspects, the two being inextricably linked and both requiring higher level of harmonisation at the Union level and the need for a European authority to ease this process.

The European Railway Agency being promoted to act as the single railway authority in the EU for issuing vehicle authorisation and safety certifications / authorisations will be the most promising way to achieve the key objectives of the European transport policy.

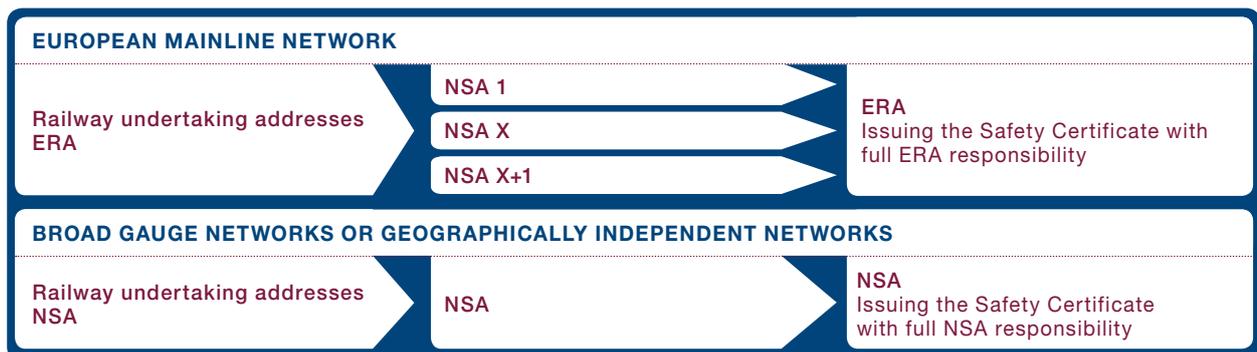
CER proposed amendments to the Interoperability Directive and the Safety Directive as well as the ERA Regulation to achieve the goal of the aforesaid simplified, harmonised and structured European approach.

**Figure 7: Vehicle Authorisation - Choice model for area of use**



*N.B.: TSI conformity assessment to be endorsed by either ERA or one of the NSAs involved*

**Figure 8: Safety Certification**



*N.B.: TSI conformity assessment to be endorsed by either ERA or one of the NSAs involved*

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## Recast of the First Railway Package: rail legislation is making good progress

Implementation of **the Recast of the First Railway Package** which was approved by Council on 21 November 2012 will **require a great deal of work on the part of both the European Commission and the member states**. CER and its members will contribute actively to the implementation process.

The Recast of the First Railway Package (now Directive 2012/34/EU), **was approved by the Council of the EU on 21 November 2012**, and published in the Official Journal of the EU on 14 December 2012. The new directive repeals Directives 91/440/EEC, 95/18/EC and 2001/14/EC and touches on five main topics:

- The requirements for separation between infrastructure managers and railway undertakings;
- The financing of the rail system;
- The role of the national regulatory bodies;
- The rules for access to rail related services;
- The rules for charging for access to rail infrastructure, for noise and for ETCS.

In the main, CER welcomes the compromise solution agreed by the European Parliament and the Council.

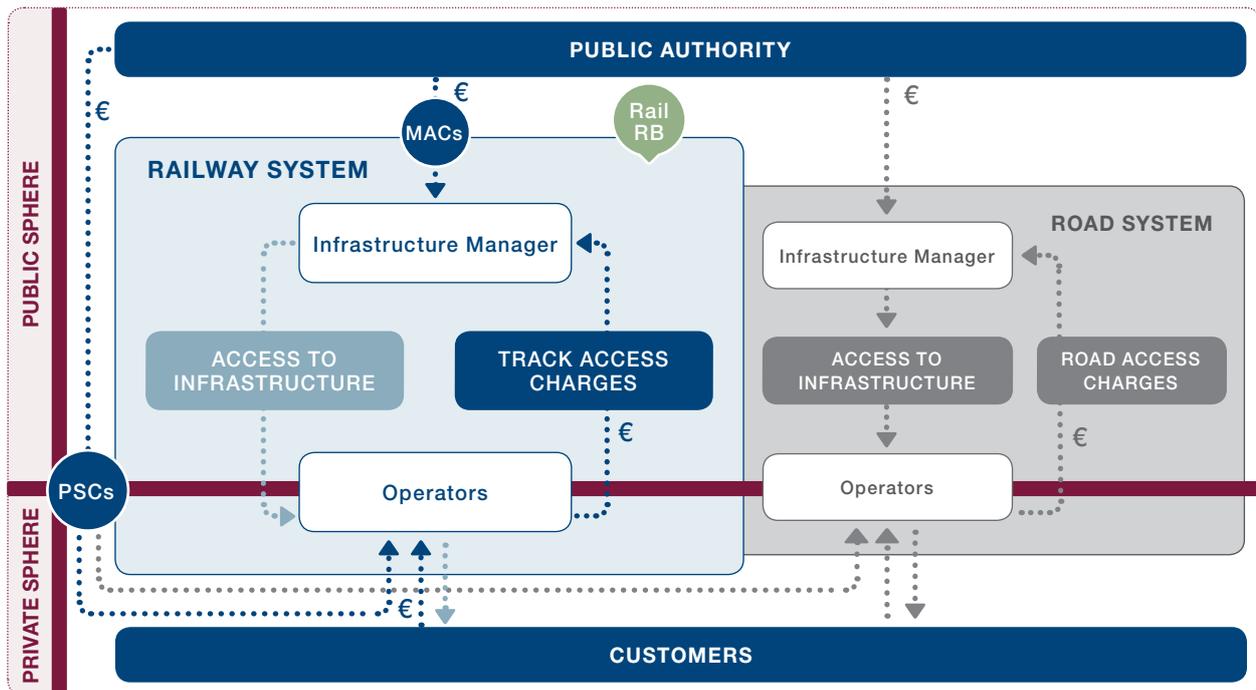
**Transparency requirements for railway accounts have been strengthened.** No further separation requirements have been added, and the option to structure railway organisations under a holding company has been retained.

When considering how **the rail system should be financed**, today member states are to ensure that infrastructure manager's profit and loss accounts are to be balanced over periods of no more than five years. Also, multi annual contracts are to be for a minimum of five years; that will provide a sensible time horizon for planning investments in infrastructure maintenance and development.

**Regulatory bodies** have been strengthened and **non-discriminatory access to rail-related services** has been granted. **Charging for noise** emissions remains voluntary, whereas **ETCS related charging** has become mandatory.

The directive provides **for five implementing actions which the member states are to undertake and twenty implementing actions which will be the responsibility of the European Commission**. CER is monitoring the work associated with the implementation closely, including important aspects such as the licensing of railway undertakings, the methods to be used for the calculation of the direct costs of operating the rail infrastructure, the variation in access charges to encourage ETCS onboard installation, the methods to be used to evaluate the economic equilibrium of public service contracts and other fundamental aspects of the rail business.

**Figure 9: Railway system's inputs, outputs and regulatory monitoring**



This CER diagram summarises how the railway system should ideally work. Access to rail infrastructure should be provided in return for track access charges set at the right level. Public authorities would grant infrastructure managers financial stability through multi-annual contracts that also allow the opportunity for medium-term planning. Public service contracts would be negotiated (avoiding both under- and overcompensation) between the relevant authorities and the public service operators. And if it is up to the regulatory body to make sure that rail market works in the right way, it is up to the public authority to make sure that intermodal competition (particularly with regard to road transport) is fair. At the end of the process, of course, there are the customers, who must be offered the best modal choice at the best price/quality ratio.

Source: CER

Implementing the directive will keep infrastructure managers and railway undertakings extremely busy. In the course of the next years, member states will gradually transpose all the new requirements which the Recast of the First Railway Package brings. However, and **with a most unfortunate timing, the European Commission published a proposal for a Fourth Railway Package in January 2013. This new proposal will amend the First Railway Package yet again** (see article on page 15).

The result is that while a number of provisions of Directive 2012/34/EU will be transposed into national legislation, in parallel those same provisions will be partially amended by the legislators in the context of the Fourth Railway Package.

It will be the **CER role** to contribute to the ongoing legislative debate whilst trying to ensure that what has been adopted recently and what will be the final outcome of the Fourth Railway Package are **consistent with each other**.

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## The making and financing of a modern and competitive Trans-European Transport Network

The last few years have been marked by lively discussions on determining Europe's infrastructure policy for the next few decades. These discussions were launched by the European Commission with the Transport White Paper published on 28 March 2011 including ambitious long-term targets for the rail sector. **In October 2011, the European Commission presented two of its instruments for reaching these goals: its proposal on TEN-T and the related financial instrument CEF.**

### TEN-T Guidelines

The aim of the review of the TEN-T Guidelines is to improve the **interoperability** and interconnections between transport modes. They will be designed to correct infrastructure disparities between and within member states, and ensure adequate planning of the future TEN-T network until 2050. The proposal defines the geographic layout and technical requirements for the future European transport network, and identifies the priorities for its development. One important aspect of the proposal is the focus on projects of high European added value, such as the removal of **bottlenecks** and the construction of **missing links**.

The proposal for the TEN-T Guidelines calls for a **dual layer approach**, consisting of a core network and a comprehensive network. In this dual layer approach the core network is to reflect the strategically most important parts of the TEN-T network and with some minor exceptions, will be the only part of the network eligible for EU co-financing. In order to improve the efficiency and interoperability of the rail infrastructure, the Commission proposal specifies principle technical parameters for the comprehensive and core networks, some of which are stricter than the current Technical Specifications for Interoperability for Infrastructure (INF TSI).

In its proposal, the European Commission identifies **ten multimodal core network corridors** (CNCs) for which member states are required to set up a corridor development plan, including an implementation plan and an investment plan. Whilst CER supports the idea of more comprehensive integration of all transport modes to the benefit of the customer, CER strongly feels that the governance structure specified in Regulation (EU) No 913/2010 which lays down rules for the management of international rail freight corridors (RFCs) should serve as a basis for the organisation of the rail part of the multimodal corridor structures. More specifically, CER believes that the rail part of the multimodal core network corridors need to be fully aligned geographically to the freight corridors as well as in terms of governance structure.

## Connecting Europe Facility

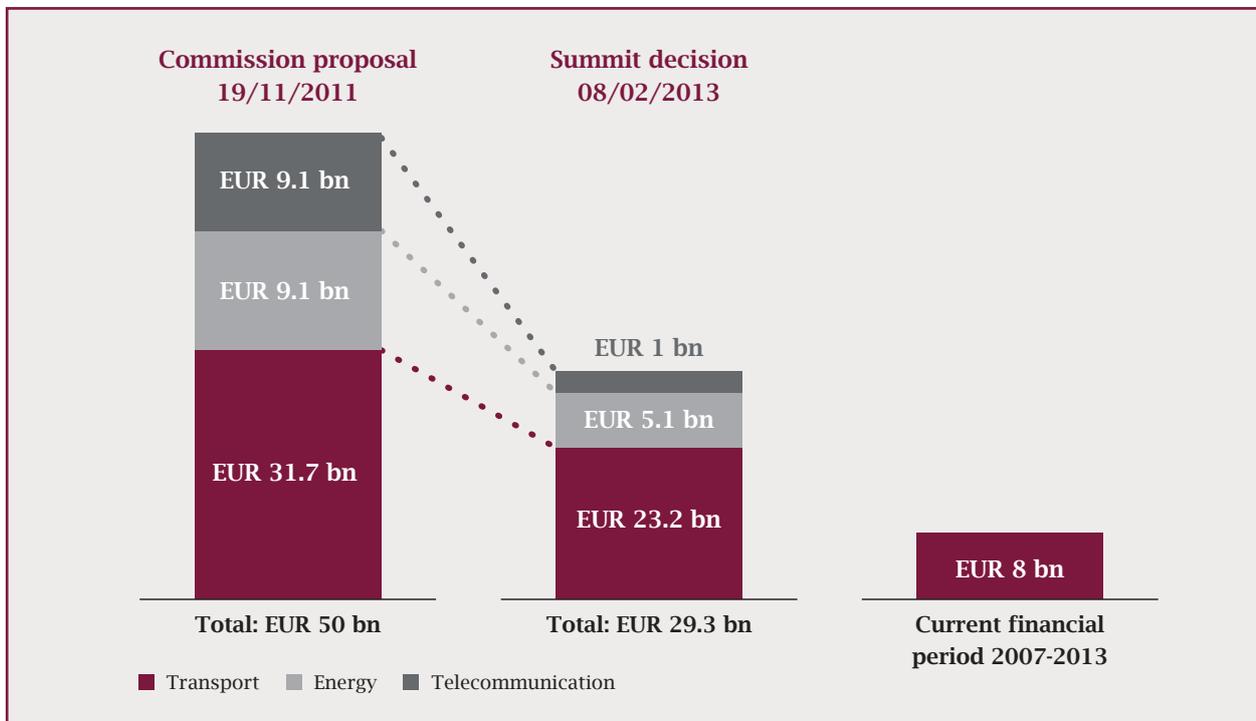
The Connecting Europe Facility (CEF) will be a new integrated financial instrument, which will form a common financial framework and be part of the Multiannual Financial Framework (MFF) 2014-2020. It will define the conditions, the methods and the procedures for providing European Union financial aid to support projects in the transport, energy and telecommunication infrastructure. The CEF proposal foresees a budget of **EUR 21.7 billion** for funding the TEN-T core network. In addition, **EUR 10 billion** from the Cohesion Fund is to be ring-fenced for transport under the central management of CEF.

The approach adopted in the CEF proposal is very positive for the rail sector. Out of the 101 pre-identified core network projects listed in the annex to the proposal, 72 are rail projects, and 27 out of the 28 cross-border projects are rail-oriented. Furthermore, the Commission proposes a **co-financing rate** of up to 20% for those costs of rail projects which are eligible, the 20% may be increased to 30% for rail projects addressing bottlenecks and to 40% for rail projects concerning cross-border sections. The proposal also provides for a co-financing rate of up to 20% for actions reducing **rail freight noise** by retrofitting of existing rolling stock, and up to 50% for the eligible costs of **ERTMS** projects.

## Views of the Council

The Transport Council reached a general approach on the TEN-T proposal on 22 March 2012, in which it introduced more flexible deadlines for completing the TEN-T network, and reduced the Commission's powers to set up and monitor the rail freight corridors by removing the concept of the corridor platform. Furthermore, the Council proposes to limit the technical standards, which are stricter than the current Infrastructure TSI, to the core network only.

**Figure 10: Connecting Europe Facility (CEF) as part of the Multiannual Financial Framework 2014-2020**



Source: CER

### ***Increased efficiency through the reduction of rail track maintenance costs***

CER, EIM and EFRTC organised a breakfast briefing on 2 October 2012 in the European Parliament to present a report on rail track maintenance works. The event, which was hosted by MEP Inés Ayala Sender (S&D, ES), was attended by politicians, journalists, rail sector representatives and other stakeholders. Rail infrastructure managers in Europe are spending over EUR 20 billion annually on railway infrastructure maintenance, and close to EUR 15 billion annually on railway infrastructure renewal. It is believed that these costs can be reduced significantly through the improvement of the logistics, planning and execution of track maintenance. In order to tap into such savings, CER, EIM and EFRTC set-up a working group aimed at developing a general methodology and identifying criteria to reduce the costs for maintenance and renewals. The work formed a follow-up to the European Commission co-funded project INNOTRACK, which identified tools for reducing life cycle costs. The main results of the working group were published in the *Track Maintenance & Renewal report*.



MEP Inés Ayala Sender (S&D, ES) hosted the briefing

In June 2012 the Council adopted a partial general approach (i.e. excluding any budget related discussion) on CEF, introducing several changes favourable to road, such as adding 10% co-financing to road projects at cross border sections in all member states, and allowing member states with isolated rail networks to be given grants for road projects. The budget part was voted at the European Summit in February 2013, when European heads of governments reached an agreement on the total EU budget 2014-2020. In accordance with the Council agreement, the overall CEF budget is to be reduced by roughly 40%, from EUR 50 billion to EUR 29.3 billion. Whilst telecommunication and energy see their budgets reduced by approximately 90% and 45% respectively, the 25% reduction in the transport budget, from EUR 31.7 billion to EUR 23.2 billion, is much less severe. As had been foreseen under the Commission proposal, the heads of government decided that the new transport budget of EUR 23.2 billion will include the EUR 10 billion to be transferred from the Cohesion Fund. Whilst the new transport budget remains below the level of ambition of the Commission proposal, it is an important improvement compared to the current financing period, where TEN-T receives a budget of EUR 8 billion (see Figure 1).

### **Views of the European Parliament**

The European Parliament is strongly supportive of both Commission proposals, including the CEF budget. Its views are largely in line with those of the CER members. This was confirmed by the vote in the TRAN Committee on TEN-T and CEF on 18 December 2012, which was favourable for the rail sector.

Ahead of the vote, there had been concerns that the European Parliament might remove the co-financing provisions for reducing rail freight noise by retrofitting of existing rolling stock. Together with some of its members, CER produced a video on noise which was circulated in the TRAN and ITRE Committees. The video, which can be found on CER's website, demonstrates the impact of retrofitting freight trains in terms of perceived noise reduction.

### ***Mind the Gap***

CER prepared a panel exhibition in the European Parliament on rail infrastructure financing, including TEN-T and CEF. The exhibition was hosted by MEP Dominique Riquet (EPP, FR) and inaugurated on 29 May 2012. The exhibition shows that in the past few decades the majority of EU transport infrastructure funding went to road projects. Numerous examples show that an adequate budget for transport infrastructure is a precondition for continued economic growth in Europe. This will be one of the main political challenges in the coming years. CER calls upon all decision makers to mind the gap. A brochure showing of the content of the panels can be found at [www.cer.be](http://www.cer.be).



With regard to the CEF budget, the European Parliament adopted a resolution on 13 March 2013 regarding the Multiannual Financial Framework (MFF) 2014-2020, in which it rejected the budget reduction agreed by the European heads of government in February 2013.

## On-going dialogue discussions

In early 2013 the European Parliament, Council and Commission entered the 'dialogue' discussions on TEN-T and CEF in an attempt to find agreement on important issues where diverging views still existed.

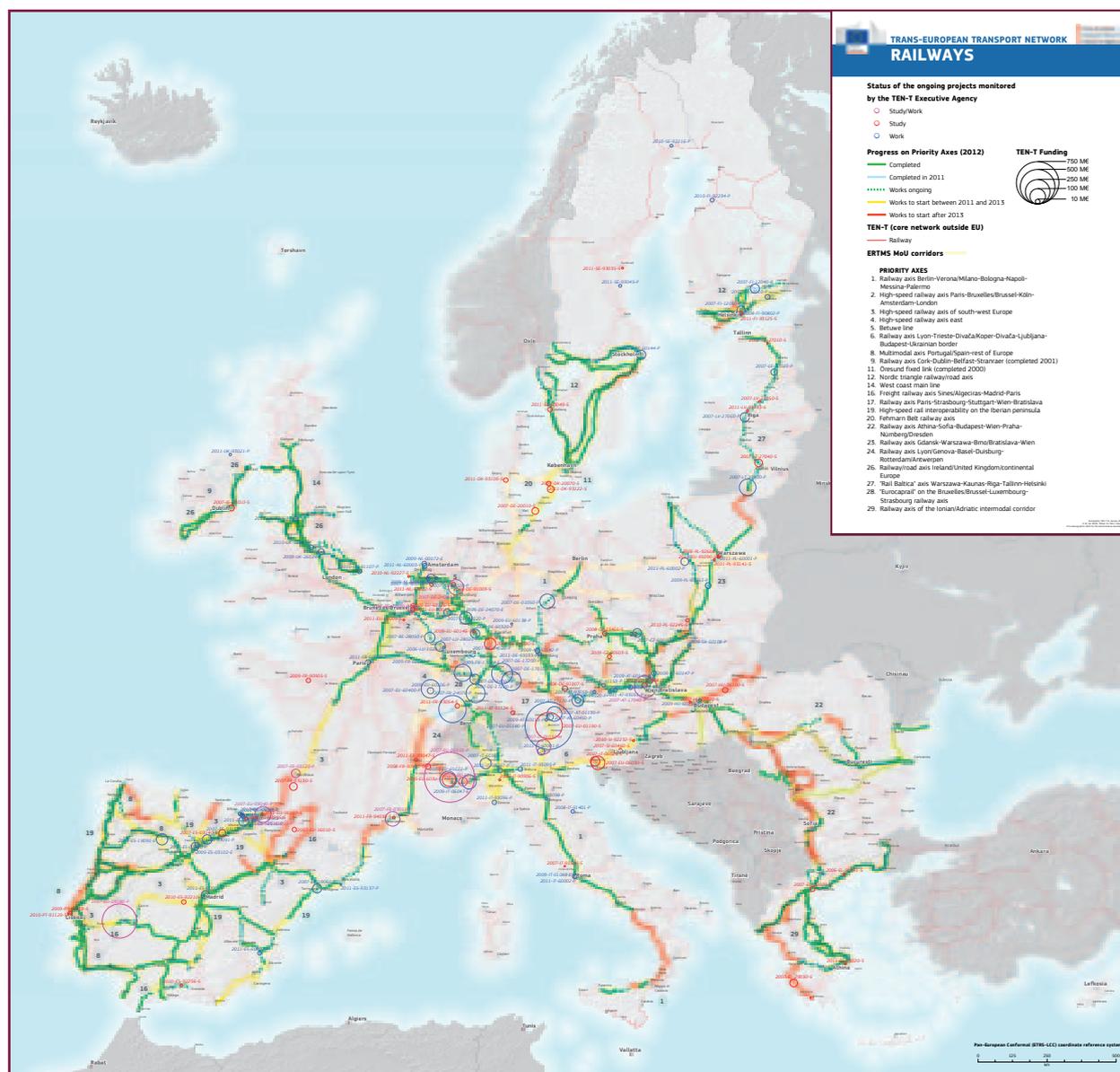
The first dialogue meeting on TEN-T took place on 20 February 2013. Agreement was reached on the methodology, the concept of European added value, and on adopting the TEN-T Guidelines as a regulation. Discussions in future meetings will focus predominantly on finding a common agreement on the technical standards, implementation deadlines, and corridors. With respect to the latter, the three parties appear to share a common view that there is a need for a geographic alignment of

the rail freight corridors (RFCs) and the core network corridors (CNCs), but there is not yet a common consensus on how this can be best achieved.

The latter point was the main subject of discussion at the second TEN-T dialogue meeting on 20 March. The European Commission was asked by the Council and the European Parliament to develop a proposal for the geographic alignment of the core network corridors to the rail freight corridors. Since such an alignment would mean adding additional sections to the already existing RFCs, the Commission was asked to investigate the legal implications of this proposal. The possibility of an extension of the deadlines for the implementation of the extended RFCs was also discussed.

The first Connecting Europe Facility dialogue meeting took place on 19 March, where generalities and the procedure for future dialogue meetings were discussed. The Irish Presidency aims to reach an agreement between Council and European Parliament before the end of its Presidency in June 2013.

**Figure 11: Railways - Status of the projects monitored by the TEN-T Executive Agency**



Source: European Commission, January 2013

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## Reform of public procurement policy

The Commission's proposal for a revision of the **Public Procurement Directives is intended to simplify and enhance the flexibility of the existing rules**. CER, however, fears that this objective is unlikely to be achieved, and is consequently making every effort to express the rail sector's concerns and have them reflected in the final legislative text.

The European Commission launched a recast of the public procurement legislative package in December 2011. The Commission's recast contained three proposals:

- A general Public Procurement Directive applicable to public administrations;
- An *ad hoc* directive which covers public undertakings in the 'utilities' sectors (rail, water, post and energy);
- A directive on the award of concessions contracts.

This legislative package is one of the priorities of the Single Market Act I.

The directives were under discussion all through 2012 and they are still being revised in both the Council of the EU and the European Parliament.

In the Parliament, the committee leading is the Internal Market and Consumer Protection (IMCO) Committee, whilst the Council Presidencies that chaired the discussions amongst member states were Denmark and Cyprus. Ireland led the discussions in the first half of 2013.

## The impact on railway activities

For railway undertakings and infrastructure managers, the revision of this package of directives is an important matter as most CER members are public undertakings. **That means that the Public Procurement 'Utilities' Directive is to be applied in the railway sector by all state-owned undertakings.**

CER welcomes the revision of these directives since they are intended to simplify and clarify the texts with a view to reducing unnecessary administrative and legal costs.

Nevertheless, during the legislative procedure, it became clear that both the European Parliament and the Council tried to **harmonise to the utmost 'classical and utilities procurement' rules** (e.g. with regard to framework agreements). In CER's view, however, the special characteristics of utilities procurement have not been taken into account sufficiently. In this regard, legislators should keep in mind that:

- Utilities operators carry out supply activities in line with entrepreneurial principles. In carrying out supply activities, utilities operators compete in many areas with private enterprises which are not subject to procurement law;
- The high percentage of the utilities procurement volume (more than 75%) exceeds the proposed thresholds and is awarded in accordance with the rules of Directive 2004/17/EC;
- As a result, companies in the utilities sector are bound by strict procurement rules which entail substantial additional costs. That does not contribute to putting them on a competitive level playing field with their competitors in the market.

## Some of the sector's concerns

When a market is opened to competition, the principle is that commercial rules apply. It is then not necessary to regulate the conditions under which a company purchases works, services and goods in the market.

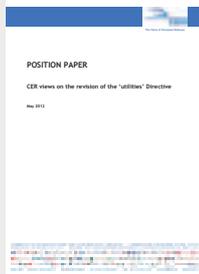
The Utilities Directive states clearly that it applies only to those transport activities where operating conditions are laid down by the competent authority.

The rail freight sector has been open to competition since 15 March 2007 (Directive 91/440/EC as amended by Directive 2001/12). It is not subject to any conditions imposed by any public authority.

The international rail passenger market is regrettably in a quite different situation although it has been opened to competition through Directive 91/440/EC as amended by Directive 2007/58 for the international passenger transport market, including cabotage.

### ***CER views on the revision of the 'Utilities' Directive***

In May 2012, CER published a position paper voicing its opinion on the revision of the Public Procurement Directives proposed by the European Commission. This position paper highlights issues with the proposed Utilities Directive, which the rail industry finds to be of major concern. The position paper is available on the CER website [www.cer.be](http://www.cer.be).



Given this background, CER was disappointed to read that **the Commission's proposal was only referring to Directive 91/440/EEC insofar as it relates to freight activities**. Directive 91/440/EEC also covers passenger traffic which has been partially opened to competition to date. This situation should be reflected fully. That would allow interested parties to obtain an individual exemption for the specific market, where appropriate.

CER also made a major effort to change the thresholds and time constraints especially insofar as they concern framework agreements and substantial amendments to the provisions of a contract.

## CER activities and the EU legislative process

In spring 2012, **CER made the industry's concerns known to key players in the EU Institutions**. CER also produced several 'ancillary' papers in support of its position, providing specific examples and simplified explanations to back-up its arguments.

The Council reached a general approach on the legislative package in December 2012 but it was not entirely satisfactory for the railway sector.

In parallel, the Transport and Tourism (TRAN) Committee of the European Parliament delivered its opinion to the Internal Market and Consumer Affairs (IMCO) Committee. In both documents the rail sector's concerns were taken into account.

The EU institutions are now involved in trialogues; they are trying to reach a first reading agreement by the end of the first half of 2013, as was suggested by the European Summit in November 2012.

CER continues to press to have the rail sector's concerns taken into account by policy makers.

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## Reinforcing rail freight's competitiveness

**A vibrant rail freight sector is a key element in a sustainable and efficient transport system, as was recognised by the European Commission in its 2011 Transport White Paper.** However, rail freight can only deliver on its promises if essential pre-conditions are in place. Throughout the year, CER has striven to highlight rail freight's potential whilst calling on decision makers to put these essential framework conditions in place.

### Rail freight after a decade of EU rail policy

More than ten years ago, the European Commission set an ambitious objective for rail freight. Numerous policy measures have been introduced over the last decade in an attempt to make this vision a reality, and a new Transport White Paper with even more ambitious objectives was adopted in 2011. **The introduction of a new package of measures for rail – the 'Fourth Railway Package' – provides an opportunity to take stock of both the positive and negative developments and to assess the effectiveness of measures introduced over the last decade.**

In April 2013, CER released a report which provided a snapshot of rail freight after a decade of EU rail policy. The report demonstrated that, although various policy measures and instruments to reinforce the competitiveness of rail freight have been introduced during the last decade the overall impact of these measures has been very limited. Modal shift towards rail is still far from being a reality and the situation has worsened during the last decade. This can be explained by several factors, all related to the fact that policy measures introduced during the last decade have not been accompanied by tangible action, such as appropriate investment in rail infrastructure and measures to put all modes on a level playing field.

**In spite of this unfavourable context, rail freight quality has been maintained and over the last few years in some cases has even improved. However, looking at the past decade, it is clear that positive efforts from the sector alone will not be sufficient.** Political decision makers should address a number of essential framework conditions at European and national or regional level as a matter of urgency:

The CER *Rail Freight Status Report 2013* is available on the CER website ([www.cer.be](http://www.cer.be)). Chapter 6 of the report contains a list of policy recommendations to achieve the full potential of rail freight and reach the ambitious targets set by the European Commission in its 2011 Transport White Paper.



The CER *Rail Freight Status Report* was officially launched during the High Level Freight dinner on 11 April 2013, in the presence of Keir Fitch, Deputy-Head of Cabinet of Commission Vice President Kallas, freight CEOs, Chairs of the boards of freight corridors and transport attachés from national permanent representations to the EU.

- 1. Sufficient investment in infrastructure**, to guarantee the availability of a well-connected and well-maintained infrastructure network for rail;
- 2. A framework in which all transport modes can compete on a level-playing field;**
- 3. Measures to remove technical and administrative bottlenecks.**



A snapshot from the site visit to the Port of Antwerp

## Multimodal freight: from policy to practice

Around ninety participants, mostly from the Permanent Representations of EU member states and from the Council, participated in a site visit to the Port of Antwerp jointly organised by CER and the Cyprus EU Presidency and greatly supported by SNCB on 6 November 2012. Participants discovered how maritime and rail transport can complement each other, with a site visit to a marshalling yard and a multimodal terminal inside the Port of Antwerp, and the main rail-based intermodal hub of the port. **The visit helped to highlight the benefits of multimodality with a rail component, at the time that crucial discussions were taking place in the Council and Parliament** regarding the next EU budget for the period 2014-2020, the Trans-European Transport Network (TEN-T) guidelines and the Connecting Europe Facility (CEF) funding instrument.

The visit ended with the distribution of two factsheets: the first on single wagonload traffic and the second on intermodal traffic in Europe. The two fact sheets put **what participants had observed during the day into perspective**. They provided factual data on single wagonload and intermodal transport and also contained essential policy recommendations to stimulate the development of multimodality and preserve the single wagonload offer in Europe.

CER has produced two factsheets on single wagonload, and on intermodal freight transport.

Both documents are available on the CER website [www.cer.be](http://www.cer.be).



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## Multi-modal distribution: yes, we can!

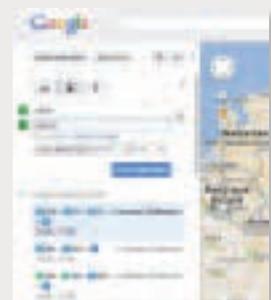
Seamless door-to-door mobility is one of the key objectives of the 2011 Transport White Paper. **Building on their unique experience in the field of complex journey planning, CER members have demonstrated they can rise to the challenge**, partnering with all kinds of third parties – such as Global Distribution Systems (GDSs) and search engines – and other modes, and developing their own innovative tools to enhance the travel experience of their customers.

### Railways: the 'backbone' of multi-modal journey planning and ticketing?

**Can rail be the backbone of multi-modal journey planning and ticketing?** This was the key question that the third CER Information Session on Journey Planning and Ticketing aimed to answer. The information session took place in December 2012 prior to the launch of the European Commission's various non-legislative and legislative initiatives on these issues.



Birgit Bohle, CEO of DB Vertrieb, presented DB's cooperative venture with Google in which DB's rail timetable and routes can be displayed alongside road routes on Google Map. This is the result of two years of work and cooperation between DB and Google.

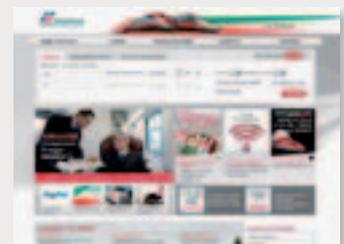


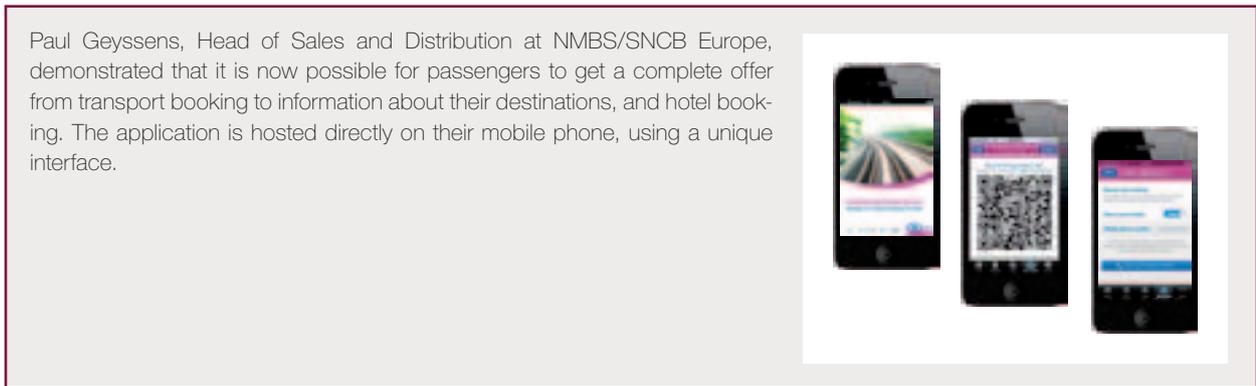
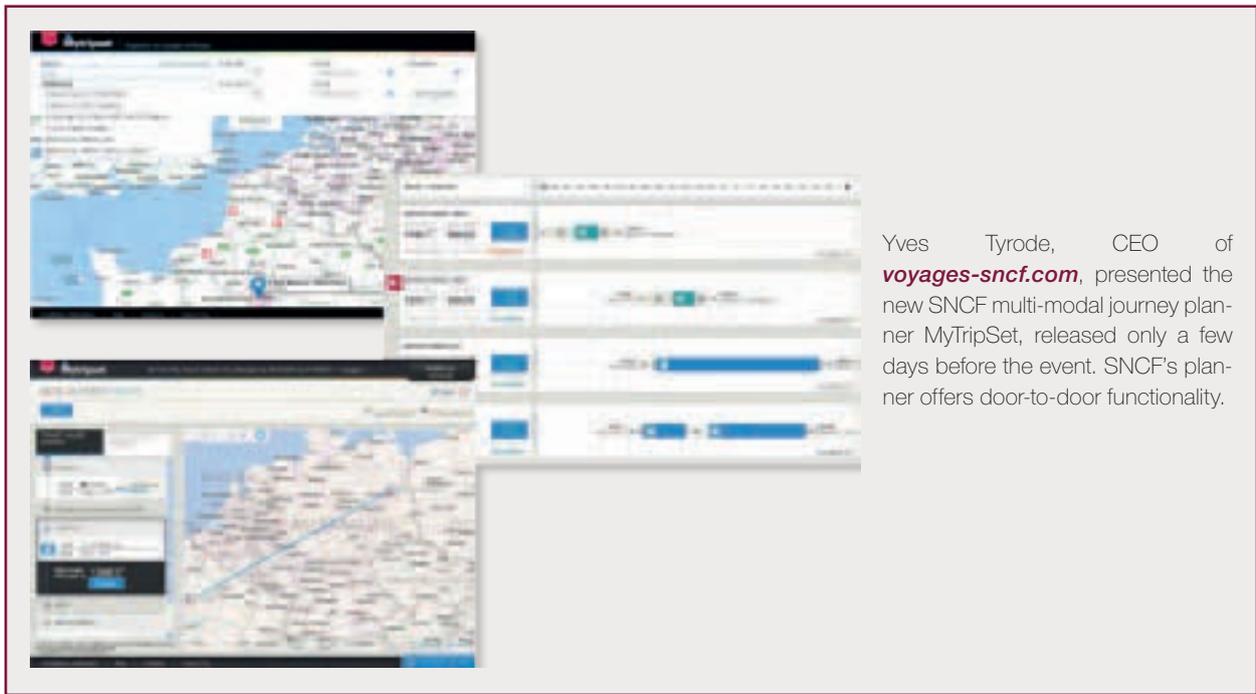
### Railways took up the challenge in full, with four examples of brand new products showcasing the dynamism and innovative capacity of the railway sector.

This information session allowed CER members to present the developments implemented in intra- and intermodal ticketing, one year on since the last CER ticketing event. Railways demonstrated that they could work with various third parties – from GDSs to search engines in order to reach new customers.

*MEP Mathieu Grosch (EPP, BE) hosted the lunch event*

An example of partnership between railway undertakings and GDSs was presented by Ernesto Sicilia, Head of the Strategic Planning Division of Trenitalia, and Jamel Chandoul, Head of Sales and Account Management at Amadeus. Railways also showed the strengths of their own distribution channels and their ability to integrate transport offers, starting with the example of Trenitalia's intermodal rail-bus offer.





Two of the companies presenting had won the first Mobility Challenge, a contest launched by European Commission Vice-President Siim Kallas - Trenitalia for the best journey planner and SNCF, for the best concept for a journey planner.

Concluding the discussion, CER outlined the rail vision for multi-modal distribution and emphasised the strong potential of rail to act as the backbone for multi-modal distribution in Europe. However, it will only be possible for railways to deliver their full potential if they retain the control of their distribution strategies and a wide choice of distribution partners and channels.

**Appropriate solutions should be sought in order to make this possible. To this end, CER will continue to engage in discussions with EU decision makers and regulators, passenger associations, and other stakeholders – including representatives from other modes and from ticket vendors throughout the forthcoming year.**

## Air/Rail distribution and ticketing: challenges and opportunities

Intermodality in the field of distribution and ticketing offers clear opportunities to both air and rail, and now is the time to seize them. The emergence of e-ticketing, of new forms of commercial partnership and new distribution models are facilitating the development of existing arrangements for air and rail operators to work together and the emergence of new partnerships. These arrangements will be for the mutual benefit of transport operators in both modes. **A workshop co-organised by the International Air Transport Association (IATA) and CER on 30 and 31 January examined the diversity of these partnerships and the potential for increased cooperation between air and rail.**

**This workshop, the first of its kind, also gave both sides the opportunity to identify their specific requirements for distributing their products and to learn from each other and from existing best practice.** The workshop was co-organised by IATA and CER under the umbrella of the IATA Travel Partners Standards Council and attracted more than sixty participants from railway undertakings, airlines, GDSs, travel agents, the ERA and the Commission.

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## Delivering on passenger rights and services

Implementation of the EU Rail Passengers' Rights Regulation demonstrates that European railways are progressing well towards meeting customers' expectations. **Protecting passengers' rights is one of the railway's traditional commitments.** Standardising the way the current regulation is interpreted and creating a level playing field between the transport modes will allow the railways to deliver even more consistently.

### Railways on track in implementing EU passenger rights

Three years after the Rail Passenger Rights Regulation (EC) No 1371/2007 (Rail PRR) entered into force, the European Commission has been busy; firstly in preparing its implementation report, due in 2013, and secondly in preparing interpretative guidelines to the regulation, due in 2014. The preparatory work which Steer Davies Gleave (SDG) did on behalf of the European Commission shows that railway undertakings have implemented most of the requirements of the PRR effectively. In particular they have been effective in providing compensation, reroute or refund, as well as satisfying the requirements for providing assistance to disabled passengers and persons with reduced mobility (PRMs). **The study even highlights the fact that some railway undertakings provide a better service than the regulation requires.**

**This positive outcome mirrors the analysis undertaken for the rail sector's own report on the implementation of the Rail PRR.** That report was published by CER and the International Rail Transport Committee (CIT) in 2012. It identified the action taken to comply with the Rail PRR as well as best practice - going beyond the regulation's

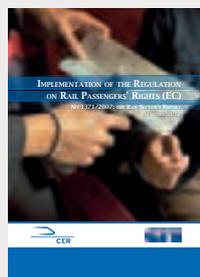
requirements. CER is also pleased to report quite respectable punctuality figures: passenger operators record levels above 95% on average. More precisely, 98% of all trains arrive within 15 minutes of their scheduled time and even using a 10 minute threshold, the figure is still 96%.

The positive performance of the sector shows that a revision of the Rail PRR is not necessary at this stage. However, it is also clear that a common interpretation of the key elements of the existing regulation is the way to deliver consistent rail passenger rights across the EU. CER thus calls on all the stakeholders involved to cooperate towards achieving this goal over the next few years.

### Standardising interpretation is the key to delivering on passengers' rights

Implementation of the regulation is at an early stage and a few elements of the Regulation are still unclear, for instance the procedural aspects of handling complaints and claims. In this regard, better dialogue between all the stakeholders, especially with the National Enforcement Bodies (NEBs), is key. **CER and the International Rail Transport Committee (CIT) therefore organised a workshop**

The report *Implementation of the Regulation on Rail Passengers' Rights (EC) No 1371/2007: the Rail Sector's Report* is available at [www.cer.be](http://www.cer.be).



CER and CIT organised a workshop with NEBs in 2012 to exchange views on the implementation of Regulation (EC) No 1371/2007.

**with NEBs in 2012 as a first step.** Representatives of the European Passenger Federation, members of the European Parliament and the European Commission participated as well. The positive outcome demonstrated a clear need to discuss issues in more detail. CER and the CIT therefore decided to continue to provide a forum for all stakeholders to exchange views. A second workshop will be held on 15 October 2013.

## Railways and passengers: one goal and the same concerns

Passengers are just as important to railways as rail is important to passengers. However, the levels of service and assistance provided to passengers are linked to a number of factors beyond the control of the railways (e.g. the level of infrastructure financing by national and European authorities, the level of compensation for public service obligations (PSO) by competent authorities, etc.) As a result, rail cannot offer the same level of service, the same level of assistance and satisfy passenger rights to the same degree in all the member states. For this reason, **the European Passenger Federation (EPF) and the European Disability Forum (EDF) and CER have produced a joint statement calling on the EU and member states to ensure a sufficient level of financing of the railway system across Europe in order to guarantee a consistent level of service.**

The common EPF/EDF/CER declaration *Railways and passengers: one goal, and same concerns* is available at [www.cer.be](http://www.cer.be).



## Cooperation to enhance accessibility

The rail sector shares the European Commission's aspiration to deliver a rail network that can be used by as many passengers as possible. Railways are developing innovative solutions to assist passengers with special needs (e.g. a common assistance booking tool) and are working with all the stakeholders to share best practice and to develop guidelines to improve the service to passengers with special needs.

At the same time, CER continues its efforts to remind policy-makers that a sustainable business environment is the key to improving access to rail services. For that reason, **CER joined enthusiastically with the AGE Platform Europe, the European Disability Forum (EDF) and the European Passenger Federation (EPF) to adopt a common declaration *Towards better accessibility of transport services.*** The declaration underlines that a financial commitment by public authorities to invest in accessibility is fundamental to delivering an accessible transport system. Furthermore, the declaration reminds to decision-makers that a level-playing field between modes of transport regarding accessibility of transport services needs to be established.

In this regard, CER joined forces with EDF in a number of common projects. In particular, on the proposed revision of the TEN-T guidelines and the Connecting Europe Facility (CEF). EDF and CER proposed an additional 10% co-financing rate to be awarded to projects enhancing the accessibility of transport infrastructure for persons with reduced mobility. Also, CER and EDF jointly organised an event in the European Parliament to stress that access conditions for transport as a whole need to be improved whilst ensuring the business environment for the rail mode is sustainable.

**CER will continue the dialogue with all the stakeholders i.e. European institutions, passenger associations and NEBs** to ensure that public decisions will help railway undertakings to deliver on passenger rights in a real spirit of service and with full consciousness of their social responsibility.



9 October 2012: MEP Georges Bach (EPP, LUX) (standing, left) welcomes the participants as well as CER Executive Director Libor Lochman (standing, right) at the CER/EDF event on accessibility of rail transport for disabled persons and persons with reduced mobility.

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## Achieving interoperability within the EU's rail system

**CER supports the European Railway Agency's (ERA) work to create the conditions for achieving interoperability within the Union's rail system.** These conditions will be further enhanced by the future role of the European Railway Agency envisaged in the proposed Fourth Railway Package.

### Interoperability

CER speakers act in ERA working parties to merge, revise and update the following Technical Specifications for Interoperability (TSI): Loc&Pas (rolling stock), INF (infrastructure), SRT (safety in railway tunnels), ENE (energy), WAG (wagons), NOI (noise) and PRM (passengers with reduced mobility).

The Loc&Pas (rolling stock), INF (infrastructure), SRT (safety in railway tunnels), ENE (energy) TSIs are expected to be voted by the RISC Committee in June 2013. CER will support the Agency's work on the application guides for those TSIs during the remainder of 2013.

### Cross Acceptance

National rules must be used for vehicle authorisation whenever TSIs are not applicable (such as where points have been left open, specific cases, or where the TSIs are geographically out of scope)

CER supported the ERA and the national safety authorities (NSAs) in 2012 in making all national technical rules and the national legal framework (vehicle authorisation processes) fully transparent in the ERA Reference Document Database (RDD).

### Safety

ERA set up the Joint Network Secretariat and defined a 'quick response' process to enhance fruitful discussions between national safety authorities (NSAs), the ERA and the Group of Representative Bodies (GRB) and to find appropriate solutions for urgent safety issues.

CER has been heavily involved in defining the JNS' working method and the 'quick response' process. CER also coordinates the communication between the JNS and the GRB. The GRB submitted several proposals to be dealt with by the JNS. CER will ensure that the topics are being handled properly.

CER will also continue to support the ERA's work in 2013, especially on the safety certificate process. CER will also start to collect feedback on the certification of entities in charge of maintenance.

### ERTMS

The ERA's main goals for 2012 were met:

- The new TSI CCS was adopted in January (2012/88/EU);
- The ERTMS baseline 3 was adopted in November (2012/696/EU).

The Memorandum of Understanding on ERTMS was signed on 16 April 2012 during a Danish Presidency event jointly chaired by Danish Transport Minister Henrik Dam Kristensen and Commission Vice-President Siim Kallas in Copenhagen. The MoU involves the European Commission, the European Railway Agency and the railway trade associations (CER, UIC, UNIFE, EIM, GSM-R Industry Group and ERFA) and concerns the strengthening of cooperation in the management of ERTMS.



A new ERTMS Memorandum of Understanding (MoU) was signed in Copenhagen on 16 April 2012 by the European Commission, the ERA and the representative associations for the rail sector. The memorandum of understanding lays down a specific work programme. The programme will allow progress to be made on five major issues in the coming years:

- Compatibility between on-board and trackside equipment;
- Consistent deployment plan;
- Free movement of ERTMS equipped locomotives on ERTMS equipped lines;
- Reduction of the cost of ERTMS equipment;
- Implementation of freight corridors.

CER takes an active role in the MoU Steering Committee to help steer the activities defined in the MoU (e.g. definition of guidelines and application guides).

GSMR baseline 0 was drawn up to be compatible with ERTMS baseline 3. A steering process is in place to monitor GSMR changes.

In 2013, CER will also help the ERA to revise the CCS TSI (extension of its scope) and to draw up a new release of CCS TSI (expected to be in 2015).

## Research

The ERRAC Roadmap project came to an end in 2012 and the technology roadmaps with an outlook until 2030/2050 were presented to the European Commission. CER carried out the task as the dissemination leader.

As a follow-up project to the ERRAC Roadmap project, the FOSTER RAIL project was submitted to the European Commission by the railway community (including manufacturers and academia). It is expected that a standardisation exploitation group will be set up. CER helped to shape the new FOSTER RAIL project in order to make it fit for HORIZON 2020.

The ERRAC Roadmap project was funded by the European Commission's Seventh Framework Programme for Research and Technological Development.



CER and UNIFE worked together to prepare amendments to HORIZON 2020 - the EU Framework Programme for Research and Innovation.

UNIFE submitted Shift<sup>2</sup>Rail as a Joint Technology Initiative (anticipating that it would be absorbed into the framework of Horizon 2020) to the European Commission.

CER (jointly with the UIC) kicked off discussions about an appropriate work programme for Shift<sup>2</sup>Rail IP 4 (telematic solutions) and IP 5 (freight). CER will continue to encourage CER members to discuss the IP 3 (infrastructure) work programme.

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## European social dialogue

**The creation of an integrated European rail transport market cannot exclude the social dimension.** Building an effective social dialogue is necessary to allow the structural changes which will make it possible for rail to compete successfully as well as to prevent social conflicts which cause significant economic losses. Social dialogue is essential for sustainable rail transport in Europe.

### CER-ETF Agreement on working conditions - Follow-up

The Agreement on the working conditions of mobile workers in cross-border services, signed on 27 January 2004 between CER and the European Transport Workers' Federation (ETF) was transformed into European legislation and is now known as Directive 2005/47/EC defining minimum working conditions for those staff.

In accordance with Article 3 of the directive, the European Commission presented a report to the European Parliament and the Council on the implementation of the directive in October 2012. As it was not possible to negotiate more flexible conditions for staff with our social partner (CER negotiated for three years, offering adequate compensation, but without any result), flexibility of mobile railway staff will either have to be increased through a new agreement with our European social partner or by means of normal European legislative procedures.

### Insecurity in local public transport

Security today is perceived as an issue that affects not only European governments but also social partners. Security is one of the fundamental pillars of society and the basis of freedom and equality for the full development of each individual. In that sense, security is not only a legal, regulatory or political value, but also a social value, because it is the foundation of the common good of society, the basis which enables all members of society fair and equal opportunities to develop.

That is why the European social partners of the rail sector developed a joint project on 'Insecurity and the feeling of insecurity in rail passenger transport' in order to prevent, manage and reduce insecurity caused by third-party violence. Their aim was to improve the personal security of workers and with it, the security of passengers. Therefore at European level, in addition to promoting the exchange of information and providing feedback, the social partners mobilised social forces and public transport companies to prevent major European cities from becoming a breeding ground for crime. They employed techniques to help identify the nature of the problem clearly and looked for ways of improving how employees and passengers, the people most exposed to the risk of aggression and violence, felt about security.

A conference on *Insecurity in Rail Passenger Transport* held in December 2012 together with the signature of the *Joint Recommendations of Social Partners* marked the final stage of this study.

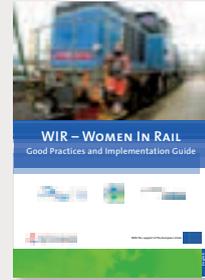
The joint declaration on *Promoting security and the feeling of security vis-à-vis third-party violence in the European railway sector - Recommendations of the European railway sector social partners* was signed by CER and ETF on 5 December 2012 and is available at [www.cer.be](http://www.cer.be)



## Women In Rail - Good Practices and Implementation Guide

Companies are confronted by a shortage of skills and have to present themselves as good employers to survive in the fight for talent. Against this background the potential of women has been recognised. They record higher educational attainment than men in almost all European countries and many studies show the advantages of mixed teams for business success. Furthermore a better balance in the gender of staff reflects the structure of most customers. In addition introducing different perspectives boosts innovation and has a positive impact on the social climate.

As the railway sector is one of the most traditional industries and one in which a male-dominated work culture persists, the European social partners published a *Good Practices and Implementation Guide*. This was one of the recommendations of the *Joint Recommendations for a better representation and integration of women in the rail sector* signed by CER and ETF in 2007. The publication is available at [www.cer.be](http://www.cer.be)



## Psycho-social risks

In order to contribute to identifying, preventing and reducing psychosocial risks within the European railway sector, the European social partners decided to carry out a joint project on psychosocial risks. Their objective was to ensure a fair working environment and decent working conditions and indeed to improve them since good conditions are necessary to provide a high quality of service. The project will identify railway-specific elements of psychosocial risks by analysing different railway professions.

Tackling psychosocial risks is necessary and useful in order to contribute to improving health and safety at work in the sector. Dealing with the problem will be beneficial for both the railway companies and for the workers. From a company perspective, reducing psychosocial risks means reducing hidden costs linked to these risks. Psychosocial risks cause between 50% and 60% of lost working days in the EU.

## Protection of staff in case of change of rail operator

In the light of the developing competition in the railway sector, particularly in regional rail transport, employees of many railway undertakings face the consequences of their employer not winning the renewal of its contract. In some countries, clear rules already exist for this issue for all business sectors. But for many member states, the relatively new Regulation (EU) No 1370/2007 (the PSO Regulation) in conjunction with EU Directive 2001/23/EC has brought this issue to the attention of human resources management. The EU Commission's proposal (in the Fourth Railway Package) to open domestic passenger markets in all member states will also imply more public competitive tendering processes in the member states.

In June 2012, CER and SNCF organised a debate and a lunch with the European Commission and members of the European Parliament on *Social harmonisation and transfer of staff in rail and urban transport – The Fourth railway package: what social dimension?* Afterwards, a CER-ETF joint working party was set up in order to get reliable information on *Social aspects and the protection of staff in case of change of railway operator* and to assess the current situation concerning the possible creation of a level playing field for social issues during competitive tendering in the various member states.

## Promoting security and the feeling of security vis-à-vis third-party violence in the European rail sector - A good practice guide

Violence is not only a problem for railway workers; it also causes high costs for the railway companies and for the public. Costs generated by absenteeism and illnesses, medical costs and, in extremis, pension costs for workers who become unable to continue to work. Not forgetting the damage to the image of the rail companies and public transport in general.

In the final stages of the joint CER-ETF project on *'Insecurity and the feeling of insecurity in rail passenger transport'*, a **Good Practices Guide** was published by the social partners. This guide promotes preventive measures to reduce and, if possible, to eliminate acts of violence to railway staff and passengers by presenting examples of various initiatives by CER members. The common objective is to reduce the widespread feeling of insecurity in the public transport sector by means of a shared approach.





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### Charging for transport's true impact

Since the last revision of the Eurovignette Directive was finally completed at the end of 2011, the EU has been working on the developments that are necessary if the 2020 goal of full internalisation of external costs in both road and rail is to be met. **CER has been helping to support the changes that are needed to meet this goal, which will help ensure that a more even playing-field in transport pricing is created.**

#### New proposals

In 2012, the European Commission launched a consultation on road charging that foresaw new legislation being put forward during 2013. **The consultation recognised many of the problems that CER has been pointing out for years.** These include the financing gap caused by the continuing drop in public expenditure on transport infrastructure and the crucial role that price signals can play in many decisions that have a long-lasting impact on the transport system.

In its response, CER took the opportunity to restate the key reasons why the sector remains strongly in favour of the internalisation of the external costs of transport. The primary motivation remains creating a more level playing-field between modes. **By charging for the full costs of transport, users are given a more accurate price that reflects the real impact of their transport choices.** Charging can encourage users to make more sustainable transport choices, and thus help to achieve the environmental goals on carbon reduction specified in the 2011 Transport White Paper.

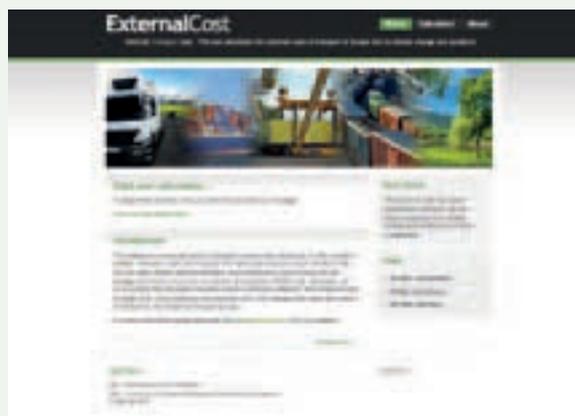
The ever-increasing pressure on public resources for infrastructure funding can also be partially relieved through internalising external costs, as **this generates new income streams which can then be reinvested in sustainable transport infrastructure** to help accelerate the political priorities of encouraging lower-carbon transport. The absence of a level playing-field in transport funding historically has meant that rail infrastructure has frequently suffered from under-investment compared to roads, particularly in Central, South and Eastern Europe. CER has been able to use a new study into the external costs of transport in Europe to support these arguments. The study, which was supervised by UIC, was undertaken by consultants CE Delft, INFRAS and ISI and completed towards the end of 2011.

Finally, the imbalance of cost-bearing between rail and road has led to an over-usage of road transport and exacerbated congestion problems. **Shifting more transport users to rail makes more efficient use of existing infrastructure capacity** and can help reduce congestion problems on overloaded roads.

#### ***The External Cost Calculator webtool***

The new rail sector web-based external cost calculator tool – available at [www.externalcost.eu](http://www.externalcost.eu) – has been designed to show the monetary value of climate change and accident costs on origin/destination routes for freight transport across Europe.

The tool, which is closely related to the EcoPassenger and EcoTransIT World tools and which uses the same routing mechanism, allows the impact of external costs on transport pricing to be demonstrated more clearly. Climate change and accident costs were selected as the first external costs to appear as they had been excluded from the 2011 revision of the Eurovignette Directive. Other external costs will be added as the tool is further developed.



## Analysis of recent changes

CER's views on the potential impact of charging were backed up in an analysis from the European Commission in January 2013. The analysis evaluated recent attempts to charge for external costs. It found that evaluation studies on the tolling systems in Austria, Germany and the Czech Republic suggest that **road freight transport is sensitive to changes in transport prices and the relevant actors respond to the price signals given by tolls**. Statistics on freight transport in Germany and Austria show that the introduction of the tolls coincided with a decrease in the average distance travelled by lorries. They also indicate that rail transport increased in Austria after the introduction of tolling in Austria and Germany, and in Germany the introduction of the road toll coincided with an increase in rail freight transport activity.

One example of how road tolls have been used to promote modal shift is the 'mark-up' levied on the Brenner motorway in Austria. The proceeds from the mark-up are being earmarked to contribute to the construction of the Brenner Base Tunnel, which forms part

of the TEN-T Priority Project 1, the rail route from Berlin to Palermo. **The mark-up therefore allows a form of pre-financing of important new infrastructure projects**. In 2011 the mark-up was extended to cover a longer section of the motorway across the whole sensitive region. The mark-up is expected to generate revenues which will account for about 25% of the total cost of the Brenner Base Tunnel. The resulting shift from road to rail will deliver significant environmental benefits for the region.

However, the report also highlighted the great diversity of approach to the charging of heavy goods vehicles that currently exists in the EU and that hinders a more coordinated approach to the issue (see Figure 12). The disparities in national road charging policies that exist can be attributed to many countries moving from time-based user charges to integrated network-wide electronic tolling more slowly than expected. Consequently, **users do not receive consistent price signals capable of steering them towards more sustainable use of the infrastructure**.

**Figure 12: The variety of methods for charging heavy goods vehicles in the EU**



### Legend

- Vignette (time-based charge)
- Electronic network-wide toll (distance-based charge)
- Toll with physical barriers (distance-based charge)
- Neither vignettes nor tolls
- ▨ Vignette (time-based charge) under preparation
- ▨ Electronic network-wide toll (distance-based charge) under preparation

Source: Commission staff working document: Ex-post evaluation of Directive 1999/62/EC, as amended, on the charging of heavy goods vehicles for the use of certain infrastructures, 11 January 2013.

## Roadmap to the future

A report on exactly how the full internalisation of external costs in all modes can be achieved is being produced by the European Commission in 2013. The report will plan out the work necessary over the next few years. As the Commission itself has admitted, “stakeholders and decision-makers do not have a clear picture of what is the situation of internalisation measures in all modes, and consequently there is no detailed timetable of measures which remain to be taken to address other modes and/or external cost elements”.

To support this work, a recent report produced for the Commission by a team of consultants led by CE Delft in 2012 produced an inventory of available measures for internalising the external costs of transport. Its conclusions were revealing. In all non-road modes, transport infrastructure use is charged on the basis of usage, and **specific charges or differentiated charges based on air pollution and noise are applied in various member states for rail transport, waterborne transport and aviation.**

However, charging in road transport is much less developed than in the non-road modes. Whilst it is applied on motorways in some member states, on all other parts of the road networks, infrastructure charging hardly exists. **In none of the member states, does road transport pay its full costs.**

“It is therefore important that correct and consistent monetary signals are given to users, operators and investors, so that their decisions on the mode of travel, on the technologies to deploy or on the type of infrastructure to invest in, are also the most desirable from the point of view of society. The internalisation of externalities is part of the effort to align market choices with societal concerns for sustainability.”

**European Commission, 2013**

The cost coverage ratios vary significantly between the various member states. They are the highest in Denmark (87%) and lowest in the Baltic States and Hungary (17% or less).

The consultants found that an indicative estimate of the total cost coverage of the infrastructure and external costs of road transport in the EU is just 38% (see Figure 13). In the event that fixed infrastructure costs are excluded, leaving external costs and variable infrastructure costs, still only half of the costs are covered – and that figure does not include the costs of congestion either.

**Figure 13: Cost coverage ratios for road transport, EU-25 (excluding Malta and Cyprus)**

Total revenues (M€/yr)	Total external costs (M€/yr)	Infrastructure & external costs of road transport (indicative) (M€/yr)		Cost coverage (indicative)	
		Excl. fixed infrastructure	Incl. fixed infrastructure	Excl. fixed infrastructure	Incl. fixed infrastructure
253 248	462 033	509 514	665 935	50%	38%

Source: *An Inventory of Measures for Internalising External Costs in Transport*, CE Delft et al., 2012

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### Further lowering the environmental impact

Rail plays an important role in reducing the environmental impact of transport, and European railways already have a good record in offering a low-carbon, energy efficient transport choice. As part of its response to EU targets, **CER is promoting the sector's interest to take the opportunity to improve its image as the greenest major form of transport.**

Reducing the environmental impact of transport remains one of the toughest challenges for the EU. The European Environment Agency warned in 2012 that transport energy consumption rose slightly in 2011 compared with 2010, whilst transport greenhouse gas (GHG) emissions were reduced by only 0.4% compared to 2009. It also pointed out that there has not been enough progress on reducing the consumption of oil in transport (see Figure 14) or on meeting the 2008 goal of sourcing 10% of transport fuel from renewable energy.

The environmental performance of rail, however, remains one of its strengths and it continues to contribute positively towards the EU reduction target. UIC's Energy and CO<sub>2</sub> Database collects data from members on a yearly basis in order to track progress towards the target agreed by CER members in 2008 to reduce the specific emissions of CO<sub>2</sub> by 30% by 2020 compared to 1990.

The 2012 report from the Energy and CO<sub>2</sub> Database showed continuing improvement towards this goal – **the emissions per passenger-km of passenger rail are now 27% below their 1990 level, whilst for freight the 1990 target has already been surpassed with emissions per tonne-km now 41% below.** Given this good work, the rail sector is already focussing increasingly on the longer-term 2030 and 2050 targets for CO<sub>2</sub> reduction and energy efficiency that were laid out in the 2010 CER/UIC sustainable mobility strategy, *Moving Towards Sustainable Mobility*.

### Electrification

A key action in reaching these targets is further electrification of the rail network. As well as the economic case, there are clear environmental reasons for this - electric trains are more energy efficient than diesel trains (see Figure 15), and their CO<sub>2</sub> emissions continue to fall as electricity generation continues to be further decarbonised. Slightly more than 50% of the European rail network is currently electrified and there are no technical obstacles to almost-full electrification of the European rail network.

The European Commission is actively supporting increased electrification of transport to reduce oil dependency and lower CO<sub>2</sub> emissions. It laid out its plans in the Clean Power for Transport Package published in early 2013. CER was disappointed that the proposal focussed largely on roads and ignored the role that rail can play in breaking the dependence of transport on oil. However, CER is working with other organisations in the Platform for the Electrification of Surface Transport to promote amendments to the package that encourage a more joined-up, intermodal, approach.

#### ***Moving Towards Sustainable Mobility: A Strategy for 2030 and beyond for the European Railway Sector - summary brochure***

Long-term targets for improving the environmental performance of the rail sector are outlined in the summary brochure published by CER in 2012. The targets represent the improvements rail aims to achieve through its own voluntary endeavours, and are separate from any requirements laid down by EU and member state legislation. They build on the agreement made by rail companies in 2008 to commit to a sector-wide cut of 30% in specific CO<sub>2</sub> emissions from rail traction over the 1990-2020 period. Available at [www.cer.be](http://www.cer.be).



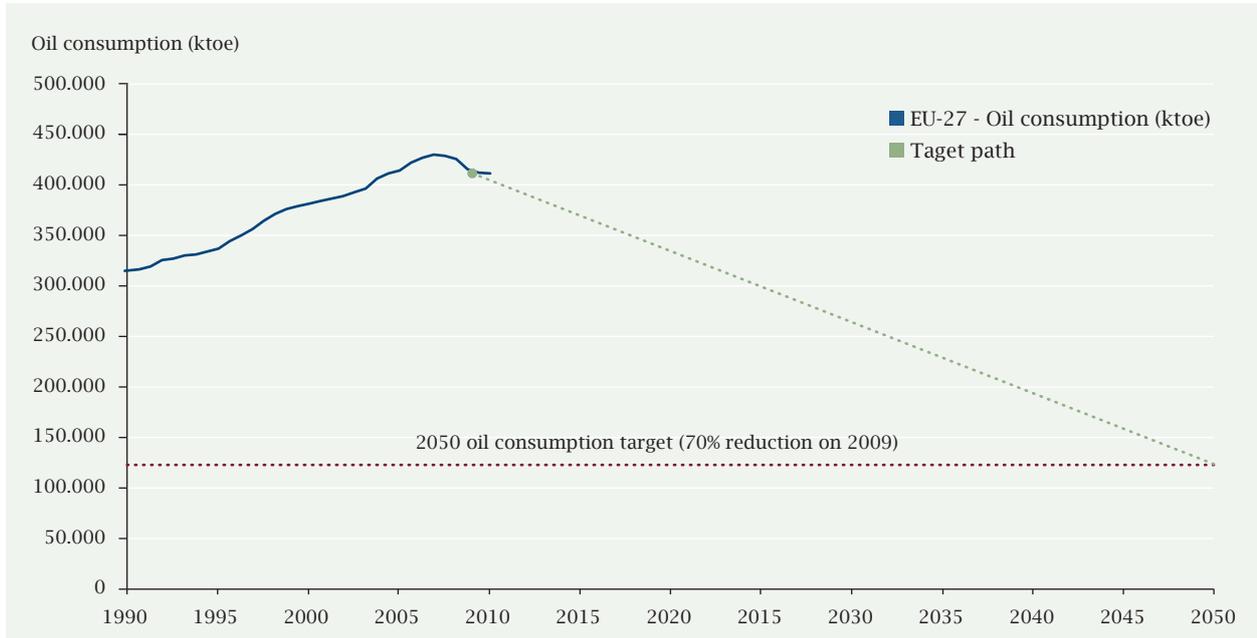
CER also supports the MERLIN project (Sustainable and intelligent Management of Energy for smarter Railway systems in Europe: an Integrated optimisation approach), begun in October 2012. The three-year project is intended to demonstrate the potential of an integrated management system for achieving more sustainable usage of energy in Europe's railway systems. Partly funded by the European Commission under the Seventh Framework Programme, one of the outputs is hoped to be the development of 'sector smart grids' which would use ICT (information and communications technology) to improve the efficiency of electricity use in rail even more.

## Fluorinated greenhouse gases

It is not only reductions in CO<sub>2</sub> emissions in transport that the EU is trying to achieve – **other greenhouse gases, some of which are thousands of times more potent than CO<sub>2</sub>, are being targeted too.** In November 2012, the European Commission adopted a proposal for a regulation on fluorinated greenhouse gases (also known as F-gases). The proposed regulation is designed to reduce their emissions by two-thirds of today's levels by 2030 by discouraging the use of those F-gases that have a very high impact on the climate in favour of alternatives. Additionally, further improvements would be made to the containment and end-of-life treatment of products and equipment that contain F-gases.

CER supports the attempt to step up efforts to reduce F-gas emissions within the EU in order to achieve climate change targets and agrees with the proposal to introduce quantitative limits on the supply of F-gases. However, such a move is not without its risks, and the rail sector is concerned that it may lead to a reduction in the availability of 'HFC-134a', the F-gas that railway undertakings use in the air conditioning systems of rail vehicles. For the strategy to work whilst not causing severe disruption to existing users, CER is arguing that the phase-down process has to be supported by a parallel 'migration strategy' to safe alternatives. It is now seeking to ensure that the Commission produces a review of the state of technology for safe, technically and economically feasible alternatives to existing F-gases. CER will also press for the Commission to have the power to amend the annual phase-down targets if it becomes clear that alternatives are not available in sufficient quantities.

**Figure 14: Reduction of transport oil consumption**



Source: TERM Report 2012, EEA

## Diesel emissions

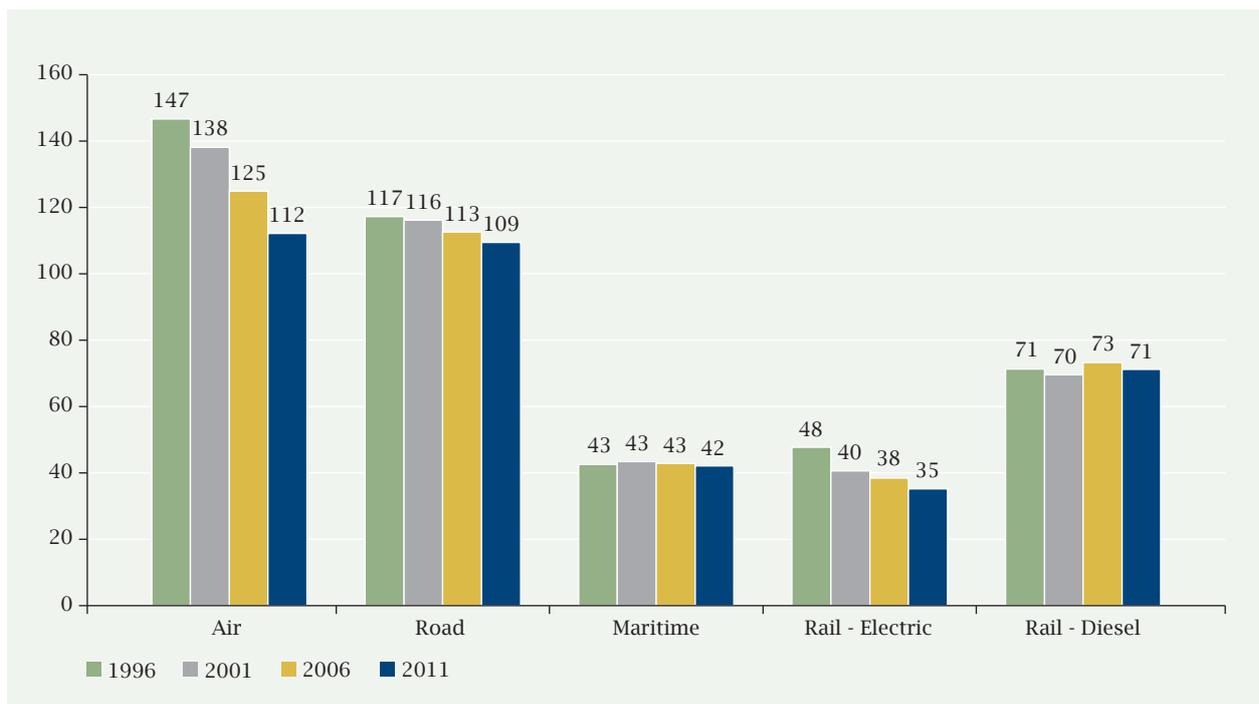
Another area where rail is ensuring that it continues to improve its act is the emissions from diesel engines. A strong political focus was put on rail exhaust emissions in the updating of the Non Road Mobile Machinery (NRMM) Directive in 2004. In early 2013, the European Commission launched a stakeholder consultation on a further revision of the NRMM Directive. The outcome of this consultation will be used to inform the Commission's legislative proposal which the Commission intends to present later this year.

Whilst the cleanest option would be to end diesel traction completely, **it is likely that rail diesel propulsion will still play its role in the European rail transport system for some years to come.** Demand should however gradually decrease: looking at future scenarios, the fleet composition projections expected in the coming years envisage that although the number of diesel multiple units will increase from around 9000 trainsets to approximately 11 250 by 2020, it will

be more than offset by the massive reduction of the number of diesel locomotives operated in the EU that is expected to be reduced from 13 700 in 2010 to approximately 9000 in 2020.

Clear improvements have been made in rail diesel use with regards to emissions of NO<sub>x</sub> (nitric oxide and nitrogen dioxide) and PM (particulate matter). The total emissions from rail diesel traction have continued to decrease since 1990 through the introduction of new engines and exhaust-after-treatment systems. Further improvements are now being developed as part of the CleanER-D (Clean European Rail-Diesel) Project. Funded in part by the European Commission, the project is designed to develop, improve and integrate emissions reduction technologies for diesel locomotives and rail vehicles. Intermediate scenarios from the CleanER-D project suggest that total NO<sub>x</sub> emissions should be reduced by around 30% between 2008 and 2020. The expected drop in emissions is due to the substantial decrease in diesel locomotive numbers linked with electrification combined with the efforts of the sector to further improve fleet quality.

**Figure 15: Specific CO<sub>2</sub> emissions per passenger-km by mode of transport in Europe (in gCO<sub>2</sub> per km), 1995-2011**



Source: European Environment Agency, 2012

## CHAPTER 3

# FOSTERING SUSTAINABLE MOBILITY ACROSS EUROPE

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## Platform for the Electrification of Surface Transport

**The Platform for the Electrification of Surface Transport is a multi-modal, multi-industry stakeholder platform that was initiated by CER and EURELECTRIC. The core idea is to integrate the future deployment of electric road vehicles into a multi-modal vision with the railways and public transport in a backbone role.**

Developing multimodal concepts for electrification will be particularly important for rail and public transport providers in order to avoid a scenario of a one-to-one replacement of standard cars with electric cars without any opportunity for modal shift. The political discourse on electric mobility so far has developed with little reference to rail, which is why CER decided to approach Eurelectric to develop a broader vision and to insert the railways into the analyses made by policy-makers. The first steps in that direction have been a success. **The Platform now counts twelve members from across industries and transport modes: Alstom, AVERE, CER, ETRA, EIA (NGO), EURELECTRIC, EUROBAT, Going Electric, Nissan, Polis, UITP, and UNIFE.** The Platform's members have signed up to a common public statement that supports electrified multimodality as the key vision for the future of transport.

The Platform's common assessment is that electrification is the key to achieving decisively lower greenhouse gas emissions while simultaneously strengthening energy security and improving air and noise quality in urban areas. This transformation of Europe's transport system should be based on natural complementarities between transport modes. In particular, existing and future electrified public transport infrastructure should serve as a mobility backbone also providing charging facilities for electric road vehicles, while facilitating seamless multimodal travel. Ultimately one should evolve towards fully electrified door-to-door multimodal transport.

The Platform's activities will develop over the course of 2013, with the specific goal of engaging with EU policy-makers on matters of common interest. This will include a formal position of the Platform with respect to the European Commission's proposed Clean Power for Transport Package which was adopted in January 2013. The Package contains a legislative proposal aiming at supporting the deployment of alternative fuels infrastructure.

On Tuesday 19 March 2013 the Platform for the Electrification of Surface Transport held its maiden event at the Renaissance Hotel in Brussels. The event was supported by MEP Gesine Meissner (ALDE, DE). The event underscored the major advantages and the potential of electrification of surface transport in both road and rail, highlighting how different modes can and should work together. Using electrified public transport infrastructure as a mobility backbone was one notable concept that attracted attention.



*CER Executive Director Libor Lochman speaking at the maiden event of the Platform for the Electrification of Surface Transport*



## CHAPTER 4

# CER IN 2012/2013

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## How does CER work?

**CER is the only organisation in the EU representing the entire European railway system.** Its diverse membership includes railway undertakings, infrastructure companies, path allocating bodies and vehicle leasing companies, including long-established companies, new entrants, and both private and public-sector organisations. CER currently has seventy-seven members and five partners.

The governance structure of CER is composed of three main bodies, ensuring a steady flow of communication between CER and its members. These bodies are supported by regular meetings at chief executive and working levels.

### CER General Assembly

The General Assembly is the CER's decision-making body. All member organisations take one seat and are represented by their chief executive or director general. The General Assembly gives the CER team guidance by taking decisions on how to advance on specific policy issues. Furthermore, it approves budgets, and accounts and the rules for calculating member fees, it elects the Management Committee and the Executive Director and decides on the admission and expulsion of members, the amendments of the statutes and the winding-up of the association.

### CER Management Committee

The Management Committee makes recommendations to the General Assembly. It consists of the CER Chairman, four Vice-Chairmen and further members elected by the General Assembly. The size of the Management Committee is limited to a maximum of 16 members.

### CER Assistants

CER members are represented by their International or European Affairs Managers in the CER Assistants group. This liaison group helps to facilitate the continuous exchange of information between CER and its members.

Beside these internal bodies, CER also arranges further meetings and working groups to discuss specific issues. Members affected are invited to take part in these discussions.

### High Level Meetings

Separate meetings are held at least once a year, with chief executives from passenger, freight and infrastructure companies to discuss specific issues affecting their business areas. There are also separate meetings for regional groups of chief executives such as those from Central and Eastern Europe.

### Working groups

The CER working groups are made up of members of the CER Assistants group or other experts delegated by member companies. The most important working groups are (in alphabetical order):

- Customs Group
- Economics and Taxation Group
- Environment Support Group
- CER ERA Steering Unit (and various working groups on interoperability and safety)
- Freight Focus Group (FFG)
- Human Resources Directors (HRD)
- Infrastructure Interest Group (IIG)
- Passenger Working Group (PWG)

All groups meet on a regular and ad-hoc basis.

### Building bridges

Internally CER follows the principle that all opinions are taken into account and that no member should feel dominated by others. CER believes that there is always a way to evaluate arguments properly and, if necessary, to find compromises in mutual respect. In the same spirit, every member has access to every working group in our association. CER is always open to new members.

## Members

Seventy-seven member railway and infrastructure companies and five partners (as of 27 April 2013)

COUNTRY	LOGO	Name <i>English Name</i>	Abbreviation	CER General Assembly Representative	Website
ALBANIA		Hekurudha Shqiptare <i>Albanian Railways</i>	HSB	Zamir RAMADANI	www.hsh.com.al
AUSTRIA		Fachverband der Schienenbahnen <i>Austrian Railway Association</i>	WKO	Robert WOPPEL	www.schienebahnen.at
AUSTRIA		Österreichische Bundesbahnen <i>Austrian Federal Railways</i>	ÖBB	Christian KERN	www.oebb.at
AUSTRIA		Salzburger Lokalbahn <i>Salzburg Regional Railway</i>	SLB	Gunter MACKINGER	www.slb.at
AUSTRIA		WESTbahn <i>WESTbahn</i>	WESTbahn	Erich FORSTER	www.westbahn.at
BELGIUM		Société Nationale des Chemins de Fer Belges /Nationale Maatschappij der Belgische Spoorwegen <i>Belgian National Railways</i>	SNCB/NMBS	Marc DESCHEEMAECCKER	www.b-rail.be
BELGIUM		SNCB/NMBS Holding <i>Belgian National Railways Holding</i>	SNCB/NMBS Holding	Jannie HAEK	www.sncb.be www.nmbs.be
BELGIUM		Thalys International <i>Thalys International</i>	Thalys	Franck GERVAIS	www.thalys.com
BOSNIA- HERZEGOVINA		Željeznice Federacije Bosne i Hercegovine <i>Railways of the Federation of Bosnia-Herzegovina</i>	ŽFBH	Nedžad OSMANAGIĆ	www.zfbh.ba
BOSNIA- HERZEGOVINA		Željeznice Republike Srpske <i>Railways of the Republic of Srpska</i>	ŽRS	Dragan SAVANOVIĆ	www.zrs-rs.com
BULGARIA		Balgarski Daržavni Železnitsi Patnicheski prevozi <i>Bulgarian Rail Passenger Operator</i>	BDŽ PP	Georgi IVANOV Metodi HRISTOV	www.bdz.bg
BULGARIA		Balgarski Daržavni Železnitsi Cargo <i>Bulgarian Rail Cargo Operator</i>	BDZ Cargo	Ivailo IVANOV Plamen DZUROV	www.bdz.bg
BULGARIA		Bulgarian Railway Company <i>Bulgarian Railway Company</i>	BRC	Nedyalka LULCHEVA RAYKOVA	www.brc-bg.com
BULGARIA		Bulmarket <i>Bulmarket</i>	Bulmarket	Stanko Dobrev STANKOV	www.bulmarket.bg
BULGARIA		Nacionalna Kompania Železopatna Infrastruktura <i>Bulgarian National Railway Infrastructure Company</i>	NRIC	Milcho LAMBREV	www.rail-infra.bg
CROATIA		Hrvatske Željeznice Putnički Prijevoz <i>Croatian Railway Passenger Company</i>	HŽ Putnički Prijevoz	Dražen RATKOVIĆ	www.hznet.hr
CROATIA		Hrvatske Željeznice Cargo <i>Croatian Cargo Railway Company</i>	HŽ Cargo	Ivan LEŠKOVIĆ	www.hznet.hr
CROATIA		Hrvatske Željeznice Infrastruktura <i>Croatian Infrastructure Railway Company</i>	HŽ Infrastruktura	Darko PERIČIĆ	www.hznet.hr
CZECH REPUBLIC		České Dráhy <i>Czech Railways</i>	ČD	Petr ŽALUDA	www.cd.cz
CZECH REPUBLIC		Správa Železniční Dopravní Cesty <i>Czech Railway Infrastructure Administration</i>	SŽDC	Jiří KOLÁŘ	www.szdc.cz

COUNTRY	LOGO	Name <i>English Name</i>	Abbreviation	CER General Assembly Representative	Website
DENMARK		Danske Statsbaner <i>Danish State Railways</i>	DSB	Jesper LOK	www.dsb.dk
DENMARK		DB Schenker Rail Danmark <i>DB Schenker Rail Denmark</i>	DB Schenker (DK)	Gottfried EYMER	www.rail.dbschenker.dk
ESTONIA		Eesti Raudtee <i>Estonian Railways</i>	EVR	Ahti ASMANN	www.evr.ee
FINLAND		VR-Yhtymä Oy <i>VR-Group- Finnish Railways</i>	VR Group	Mikael ARO	www.vr.fi
FRANCE		Société Nationale des Chemins de Fer Français <i>French National Railway Company</i>	SNCF	Guillaume PEPY	www.sncf.fr
FRANCE		Transdev <i>Transdev</i>	Transdev	Jean-Marc JANAILLAC	www.transdev.net/fr
FRANCE		Union des Transports Publics et Ferroviaires <i>French Union of Public Transport and Rail</i>	UTP	Bruno GAZEAU	www.utp.fr
GERMANY		Deutsche Bahn <i>German Railway Group</i>	DB	Rüdiger GRUBE	www.deutschebahn.com
GERMANY		TX Logistik <i>TX Logistik</i>	TX Logistik	Karl MOHNSSEN	www.txlogistik.de
GERMANY		Verband Deutscher Verkehrsunternehmen <i>German Railway Association</i>	VDV	Oliver WOLFF	www.vdv.de
GREAT BRITAIN		Association of Train Operating Companies <i>Association of Train Operating Companies</i>	ATOC	Roger COBBE	www.atoc.org
GREAT BRITAIN		DB Schenker Rail UK <i>DB Schenker Rail UK</i>	DB Schenker (UK)	Alain THAUVERTE	www.rail.dbschenker.co.uk
GREAT BRITAIN		Eurostar (UK) <i>Eurostar (UK)</i>	Eurostar	Nicolas PETROVIC	www.eurostar.com
GREAT BRITAIN		High Speed Two <i>High Speed Two</i>	HS2	Andrew MCNAUGHTON	www.hs2.org.uk
GREECE		Organismo Siderodromôn Elladas <i>Hellenic Railways Organisation</i>	OSE	Panayiotis THEOFANOPOULOS	www.ose.gr
GREECE		TRAINOSE <i>TRAINOSE - Greek National Passenger Train Operating Company</i>	TRAINOSE	Athanassios ZILIASKOPOULOS	www.trainose.gr
HUNGARY		Central-European Railway <i>CER Central European RailwayTransport, Trading and Service Company</i>	CER Cargo	István BÁRÁNY	www.cer.hu
HUNGARY		Magyar Vasúti Fuvarozói Egyesülés <i>Hungarian Railway Association</i>	HUNGRAIL	László MOSÓCZI	www.hungrail.hu
HUNGARY		Magyar Államvasutak <i>Hungarian State Railways</i>	MÁV	Ilona DÁVID	www.mav.hu
HUNGARY		Rail Cargo Hungaria <i>Rail Cargo Hungaria</i>	RCH	Imre KOVÁCS	www.railcargo.hu
HUNGARY		Győr-Sopron-Ebenfurth Vasút <i>Raaboedenburg-Ebenfurter Eisenbahn</i>	GySEV	Szilárd KÖVESDI	www.gysev.hu
IRELAND		Iarnród Éireann <i>Irish Rail</i>	IÉ	David FRANKS	www.irishrail.ie

COUNTRY	LOGO	Name <i>English Name</i>	Abbreviation	CER General Assembly Representative	Website
ITALY		Ferrovie dello Stato Italiane <i>Italian Railway Group</i>	FS Italiane	Mauro MORETTI	www.fsitaliane.it
LATVIA		Baltijas Ekspressis <i>Baltic Rail Freight Company</i>	BE	Janis BLAZE	www.asbe.lv
LATVIA		Baltijas Transita Serviss <i>Baltic Transit Services</i>	BTS	Ivars SORMULIS	
LATVIA		Latvijas Dzelzceļš <i>Latvian Railways</i>	LDZ	Uģis MAGONIS	www.ldz.lv
LITHUANIA		Lietuvos Geležinkeliai <i>Lithuanian Railways</i>	LG	Stasys DAILYDKA	www.litrail.lt
LUXEMBOURG		Société Nationale des Chemins de Fer Luxembourgeois <i>Luxembourg National Railway Company</i>	CFL	Alex KREMER	www.cfl.lu
LUXEMBOURG		CFL Cargo <i>Luxembourg Cargo Company</i>	CFL Cargo	Fernand RIPPINGER	www.cflcargo.eu
MACEDONIA		Makedonski Železnici Infrastructure <i>Railways of the Former Yugoslav Republic of Macedonia Infrastructure</i>	PE MZ Infrastructure	Irfan ASANI	www.mz.com.mk
MACEDONIA		Makedonski Železnici Transport <i>Railways of the Former Yugoslav Republic of Macedonia Transport</i>	PE MZ Transport	Oliver DERKOSKI	www.mztransportad.com.mk
MOLDOVA		Calea Ferată din Moldova <i>Moldovan Railways</i>	CFM	Vitalie STRUNA	www.railway.md
MONTENEGRO		Montecargo <i>Montenegro National Freight Operating Train Company</i>	Montecargo	Budimir ŠARANOVIĆ	www.montecargo.me
MONTENEGRO		Željeznicka Infrastruktura Crne Gore <i>Rail Infrastructure Montenegro</i>	ZICG	Milan ČOLAKOVIĆ	www.zicg.me
NETHERLANDS		DB Schenker Rail Nederland <i>DB Schenker Rail Netherlands</i>	DB Schenker (NL)	Aart KLOMPE	www.dbschenker.nl
NETHERLANDS		Nederlandse Spoorwegen <i>Dutch Railways</i>	NS	Bert MEERSTADT	www.ns.nl
NORWAY		Norges Statssbaner <i>Norwegian State Railways</i>	NSB	Geir ISAKSEN	www.nsb.no
POLAND		Polskie Koleje Państwowe <i>Polish State Railways</i>	PKP	Jakub KARNOWSKI	www.pkp.pl
POLAND		Rail Polska <i>Rail Poland</i>	Rail Polska	Timothy HOLLAWAY	www.railpolska.pl
PORTUGAL		Comboios de Portugal <i>Portuguese Railway Company</i>	CP	Manuel QUEIRÓ	www.cp.pt
ROMANIA		Compania Națională de Cai Ferate <i>Romanian National Infrastructure Company</i>	CFR	George MICU	www.cfr.ro
ROMANIA		Societatea Națională de transport Feroviar de Călători <i>Romanian National Passenger Train Operating Company</i>	CFR Călători	Valentin DOROBANȚU	www.cfr.ro/calatori
ROMANIA		Societatea Națională de Transport Feroviar de Marfă <i>Romanian National Freight Operating Train Company</i>	CFR Marfă	Alexandru Dragoș DRĂGHICI	www.cfrmarfa.cfr.ro

COUNTRY	LOGO	Name <i>English Name</i>	Abbreviation	CER General Assembly Representative	Website
ROMANIA		Grup Feroviar Roman <i>Romanian Rail way Group</i>	GFR	Sorin CHINDE	www.gfr.ro
ROMANIA		Regiotrans Brasov <i>Romanian Transport Brasov</i>	Regiotrans Brasov	Costel COMANA	www.regiotrans.ro
ROMANIA		SC Transferoviar Grup SA <i>Romanian Railway Company</i>	TFG	Kinga MADARASAN	www.transferoviar.ro
SERBIA		Železnice Srbije <i>Serbian Railways</i>	ŽS	Dragoljub SIMONVIĆ	www. serbianrailways.com
SLOVAKIA		Železnice Slovenskej Republiky <i>Slovak Infrastructure Company</i>	ŽSR	Štefan HLINKA	www.zsr.sk
SLOVAKIA		Železničná Spoločnosť Slovensko <i>Slovak Rail Passenger Operator</i>	ZSSK	Pavol GÁBOR	www.slovakrail.sk
SLOVAKIA		Železničná Spoločnosť Cargo Slovakia <i>Slovak Rail Freight Company</i>	ZSSK Cargo	Vladimir LUPTÁK	www.zscargo.sk
SLOVENIA		Slovenske Železnice <i>Slovenian Railways</i>	SŽ	Dušan MES	www.slo-zeleznice.si
SPAIN		Administrador de Infraestructuras Ferroviarias <i>Spanish Railway infrastructure Manager</i>	ADIF	Enrique VERDEGUER	www.adif.es
SPAIN		RENFE Operadora <i>National Spanish Railway Operator</i>	RENFE Operadora	Julio GÓMEZ POMAR	www.renfe.es
SWEDEN		Sveriges Branschföreningen Tågoperatörerna <i>Association of Swedish Train Operators</i>	ASTOC	Jan SUNDLING	www. tagoperatörerna.se
SWITZERLAND		BLS <i>Swiss Railway Company</i>	BLS	Bernard GUILLELMON	www.bls.ch
SWITZERLAND		Schweizerische Bundesbahnen/Chemins de Fer Fédéraux Suisses/Ferrovie Federali Svizzere <i>Swiss Federal Railways</i>	SBB/CFF/FFS	Andreas MEYER	www.sbb.ch
TURKEY		Türkiye Cumhuriyeti Devlet Demiryolları <i>Turkish State Railway</i>	TCDD	Süleyman KARAMAN	www.tcdd.gov.tr

## Partners

JAPAN		East Japan Railway Company <i>East Japan Railway Company</i>	JR East	Yoshio ISHIDA	www.jreast.co.jp
GEORGIA		Saqartvelos Rkinigza <i>Georgian Railway</i>	GR	Irakli EZUGBAYA	www.railway.ge
HUNGARY		Vasúti Pályakapacitás-Elosztó <i>Hungarian Railway Capacity Allocator</i>	VPE	Réka NÉMETH	www.vpe.hu
NETHERLANDS		Mitsui Rail Capital Europe <i>Locomotive Leasing Company</i>	MRCE Dispolok	Tetsu IKEDA	www.dispolok.com
SWITZERLAND		Trasse Schweiz AG <i>Swiss Train Path allocating Body</i>	Trasse Schweiz	Thomas ISENMANN	www.trasse.ch

## CER Management Committee (April 2012 - April 2013)



**Mr Mauro MORETTI**  
Ferrovie dello Stato Italiane, FS Italiane  
*CER Chairman*



**Mr Roger COBBE**  
Association of Train Operating Companies,  
ATO  
*Vice-Chairman*



**Mr Jan SUNDLING**  
Branschföreningen Tågoperatörerna, ASTOC  
*Vice-Chairman*



**Mr Jiří KOLÁŘ**  
Správa Železnici Dopravní Cesty, SŽDC  
*Vice-Chairman*



**Mr Andreas MEYER**  
Schweizerische Bundesbahnen / Chemins  
de Fer Fédéraux Suisses / Ferrovie Federali  
Svizzere, SBB/CFF/FFS  
*Vice-Chairman*



**Ms Ilona DÁVID**  
Magyar Államvasutak, MÁV  
*Member*



**Mr Marc DESCHEEMAECKER**  
Société Nationale des Chemins de fer  
Belges / Nationale Maatschappij der  
Belgische Spoorwegen, SNCB/NMBS  
*Member*



**Mr Rüdiger GRUBE**  
Deutsche Bahn, DB  
*Member*



**Mr Jakub KARNOWSKI**  
Polskie Koleje Państwowe, PKP  
*Member*



**Mr Christian KERN**  
ÖBB-Holding, ÖBB  
*Member*



**Mr Bert MEERSTADT**  
Nederlandse Spoorwegen, NS  
*Member*



**Mr Guillaume PEPY**  
Société Nationale des Chemins de Fer  
Français, SNCF  
*Member*



**Mr Oliver WOLFF**  
Verband Deutscher Verkehrsunternehmen,  
VDV  
*Member*



**Jérôme GALLOT**  
Veolia, Veolia Transport



**Kaido SIMMERMANN**  
EVR, Aktsiaselts Eesti Raudtee

Chief Executive Officers from CER member companies, who are elected as members of the Management Committee of UIC Europe but who are not members of the CER Management Committee are automatically associated to the CER Management Committee.

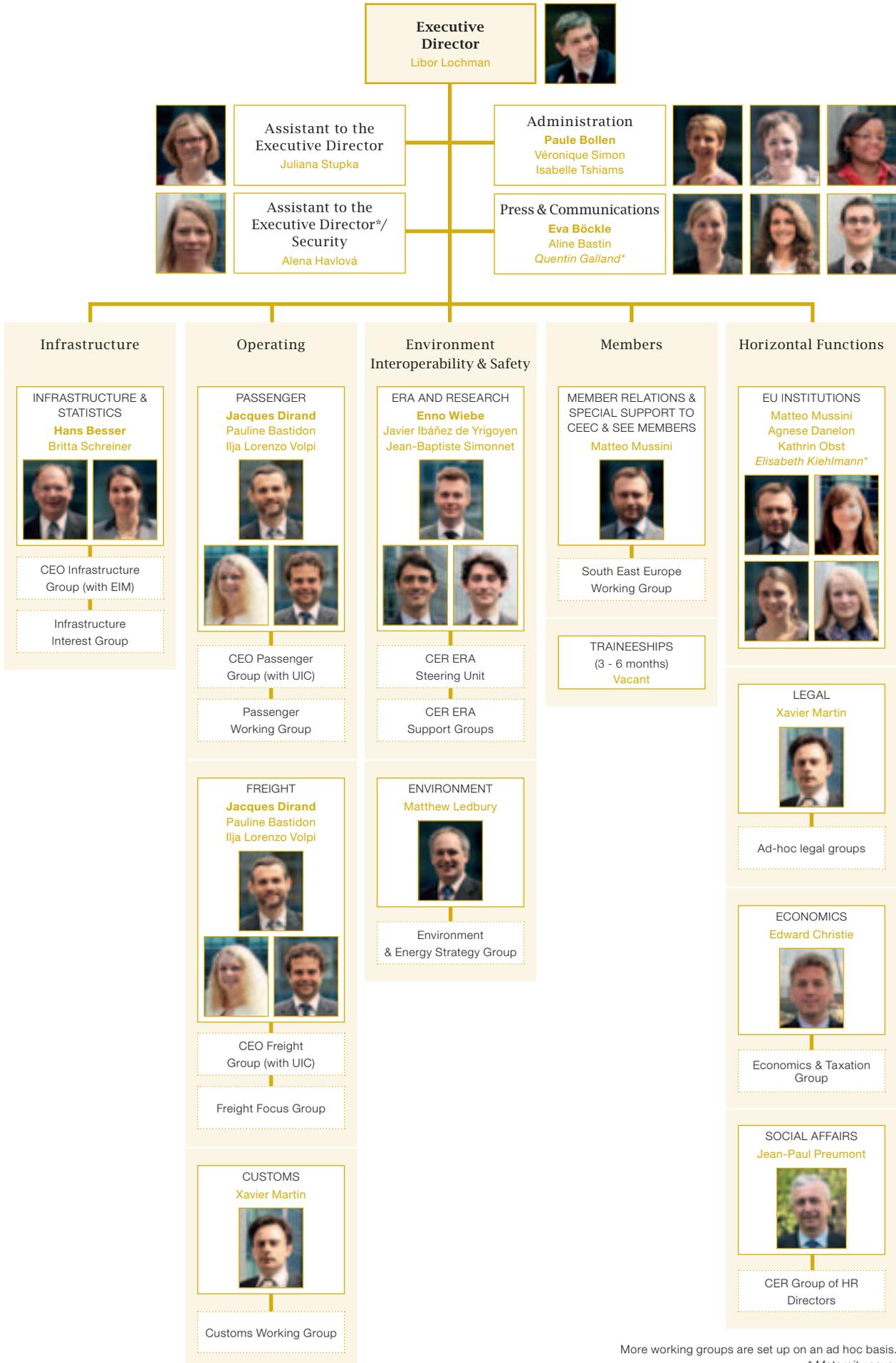


**Mr Bernard GUILLELMON**  
BLS, BLS  
*Associated Member*



**Mr Manuel QUEIRÓ**  
Comboios de Portugal, CP  
*Associated Member*

# CER working structure (as of April 2013)



More working groups are set up on an ad hoc basis.  
\* Maternity cover

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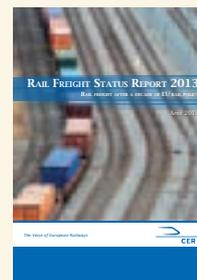
## List of CER publications

(April 2012 - April 2013)

### CER brochures

#### ***Rail Freight Status Report 2013 – Rail freight after a decade of EU rail policy*** – April 2013

Ambitious objectives were set for rail freight competitiveness by the European Commission's 2001 Transport White Paper. The *Rail Freight Status Report 2013* draws attention to the unsatisfactory state of rail freight in Europe after a decade of policy measures: competitiveness, market developments, progress of rail freight's quality over time. The report provides policy recommendations to create a level-playing field between transport modes and promote a modal shift towards rail, in order to meet the objectives set by the European Commission for more competitiveness, efficiency and sustainability in the transport sector.



#### Other brochures:

#### › ***Promoting security and the feeling of security vis-à-vis third-party violence in the European rail sector – A good practice guide*** – March 2013

This guide, available in English, French and German, is the result of a joint project developed by CER, together with the European Transport Workers' Federation (ETF), on insecurity and the feeling of insecurity in rail passenger transport. It includes good practice examples from CER members and promotes the adoption of preventive measures as a response to acts of violence committed on railway staff and passengers.

#### › ***Moving towards sustainable mobility – A strategy for 2030 and beyond for the European railway sector*** – November 2012

This brochure, endorsed jointly by members of UIC and CER, sets out objectives to meet by 2030 for the railway sector, as well as a long-term vision for 2050, in the fields of climate protection, energy efficiency, exhaust emissions and noise emissions. The strategy builds on the commitment already made by UIC and CER members in 2008 to achieve a reduction of 30% in the specific CO<sub>2</sub> emissions from rail traction over the 1990-2020 period.

#### › ***Implementation of the Regulation on Rail Passenger's Rights (EC) No 1371/2007: the rail sector's report*** – October 2012

This brochure, produced jointly with the International Rail Transport Committee (CIT), reviews the progress made in implementing the European regulation on the rights and obligations of rail passengers, three years after it came into force. It also includes a list of case studies showing how railways are working together to enhance the level of service and assistance to all passengers.

#### › ***WIR – Women in Rail – Good practices and implementation guide*** – September 2012

This guide, published by CER, the European Infrastructure Managers (EIM) and the European Transport Workers' Federation (ETF), looks at the representation of women in the railway sector. Through a series of case studies, it aims to inform on what is being done to integrate women in the railway sector more successfully and to promote gender equality in order to achieve a work environment, where women and men can develop their full potential under the same conditions.

#### › ***MIND THE GAP – An exhibition on railway infrastructure financing*** – May 2012

CER with the support of MEP Dominique Riquet (EPP, FR) put together an exhibition on the financing instruments for railway infrastructure offered by the EU and member states, showing best practices and suggesting how financing could be optimised. The exhibition, which was on display in the European Parliament from 29 May to 1 June, was accompanied by the *MIND THE GAP* brochure, providing facts and figures about railway infrastructure in Europe.

## CER position papers

### **Position paper on domestic passenger market opening in the context of the Fourth Railway Package** – September 2012

This document outlines CER position on the liberalisation of domestic passenger traffic. It states that market opening has to take place in a context where infrastructure and public service contracts are adequately financed, whilst respecting the economic equilibrium of such contracts in accordance with existing EU legal requirements and without preventing the development of competition on the market.



### **Other position papers:**

- › *Position paper on the NRMM Directive, April 2013*
- › *CER comments on the Commission staff working document on transport security, March 2013*
- › *Position paper on the public consultation on enablers for European multimodal travel planning and information services, March 2013*
- › *Position paper on the public consultation on the European Union e-Freight initiative, January 2013*
- › *Revision of Appendix T of TSI OPE (decision 2012-757/EU), January 2013*
- › *Climate change and standardisation – A sector position paper, January 2013*
- › *Position paper on the possibility to use smartcards combining train driving licences and complementary certificates, November 2012*
- › *Position paper on the revision of the Technical Specification for Interoperability/Energy (ENE)*
- › *Position paper on the revision of the Technical Specification for Interoperability/Locomotives and Passenger rolling stocks (Loc & Pas) , September 2012*
- › *Initial view on the European Commission guidelines on the interpretation of the Public Service Regulation, September 2012*
- › *Swiss federal law on railway noise – CER/UIP/ERFA comments on the consultation, September 2012*
- › *CER/UNIFE/UIP/ERFA position paper on the future role of ERA, July 2012*
- › *Position paper on standardisation and climate change, June 2012*
- › *Position paper on the ERA report on railway safety performance in the EU, June 2012*
- › *Position paper on CECM-NSA request for flexibility, June 2012*
- › *CER views on the revision of the 'Utilities Directive', May 2012*
- › *Position paper on the social consultation on the revised common safety method on risk evaluation and assessment, May 2012*

## CER studies

### **EVES-Rail study: economic effects of vertical separation in the railway sector** – November 2012

What are the net quantitative effects of structural reforms in the European rail sector to-date? Is any specific model systematically superior to the others based on the empirical record? Would a tightening of EU separation requirements be economically justified? The EVES-Rail study assesses the effects of different forms of vertical organisation in the railway sector in terms of railway system costs, rail modal share, state spending, competitive market entry, and alignment of incentives within the rail sector value chain.



### **Other studies:**

- › *Report from the EIM/EFRTC/CER Working Group on market strategies for track maintenance and renewal, October 2012*
- › *WIR – Women in Rail final report, September 2012*
- › *Rail sector study into the external costs of transport in Europe, May 2012*

## Charters and agreements

### **CHALLENGE 2050 – The rail sector vision** – March 2013

Challenge 2050 is the European rail sector's shared perception of where the rail system could be by 2050. The document first gives a brief overview of the rail sector and then sets out the sector's shared vision. It also identifies the many goals that are complementary to the vision and support a rail system that is responsive to the needs of Europe's citizens.



### **Other charters and agreements:**

- › *Joint declaration of the PSEF – Three elements for reshaping the future, March 2013*
- › *Joint statement – Towards better accessibility of transport services, February 2013*
- › *Common statement – Platform for the electrification of surface transport, January 2013*
- › *Promoting security and the feeling of security vis-à-vis third party violence in the European railway sector – recommendations of the European railway sector social partners, December 2012*
- › *Public Services Employers' Forum Joint Declaration – Thinking the future, May 2012*

### **Factsheets**

- › *Railways and passengers: one goal, and same concerns, October 2012*
- › *Factsheet on intermodal freight transport, November 2012*
- › *Factsheet on single wagonload freight, November 2012*

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## List of political events

(April 2012 - April 2013)

### 2012

#### 16 April

A European Rail Traffic Management Systems (ERTMS) conference was organised under the auspices of the Danish Presidency of the European Union. A new Memorandum of Understanding was signed by Vice-President of the European Commission Siim Kallas and Executive Director of ERA Marcel Verslype and rail sector's representatives, including the Executive Director of CER Libor Lochman, reaffirming the commitment of the stakeholders to cooperate closely in streamlining the ERTMS testing and authorisation processes together with strict application of the ERA change control management process so as to ensure that equipment already in place can continue to interface.

#### 24-25 May

The Danish Presidency of the EU organised an important conference on the financing of large transport infrastructure projects in Copenhagen. CER presented its position on the role of user financing in the railway sector.

#### 29 June

European Commission Vice-President Siim Kallas responsible for transport met with top-level representatives of the European transport and logistics sector, at the occasion of the launch meeting of the High Level Group on Logistics (HLGL), set up to provide strategic advice on the future transport policy measures with impact on logistics.

#### 1 July

Cyprus took over the rotating Presidency of the Council of the European Union from Denmark.

#### 3 July

The European Parliament approved the compromise text on the recast of the First Railway Package.

#### 3 July

The European Commission's Sustainable Urban Mobility campaign was launched. This three-year initiative is designed to support sustainable urban mobility campaigners in thirty-one countries and to promote the advantages of combining different modes of transport.

#### 6 September 2012

The European Economic and Social Committee (EESC) hosted a major conference on the upcoming Fourth Railway Package. CER Executive Director Libor Lochman presented CER's positions on the future of the ERA in the first afternoon session, and CER's position on market opening in the second afternoon session. Preliminary results from CER's study on unbundling were also presented for the first time at the event.

#### 10 September

The European Commission selected seventy-four projects that will receive almost EUR 200 million in EU co-financing from the trans-European transport network (TEN-T) programme to continue improving transport infrastructure across the EU.

#### 11 September

The European Parliament adopted the Regulation on European standardisation.

#### 24 September 2012

The European Commission organised a 'Stakeholder Conference on the Fourth Railway Package' in Brussels. CER Chairman Mauro Moretti outlined CER's priorities for the package.

#### 3 October

The European Commission published the Single Market Act II, a communication which identifies four drivers to strengthen the EU Single Market and generate growth in the future. The opening of domestic rail passenger services is considered to be a priority towards fully integrated networks in Europe.

#### 15 October – 20 October

The EU single market celebrated its twentieth anniversary.

#### 23 October

The European Parliament adopted the 'Resolution on passenger rights in all transport modes'. The resolution outlines that there should be no distortion between the rights for passengers applicable in different transport modes.

#### 29 October

European Transport Ministers at the Council meeting in Luxembourg put the official seal on the text agreed with the European Parliament regarding the proposal for a Directive establishing the Single European Railway Area – the Recast of the First Railway Package.

### **8 November**

Rail freight operators and infrastructure managers involved in the establishment of Corridor 1 Rotterdam-Genoa met in Brussels at CER premises and agree to strengthen their working relationship and ensure better coordination to prepare for November 2013, when the corridor is to become operational, and beyond.

### **27 November**

CER contributed to bringing together the views of the rail freight operators and infrastructure managers involved in Rail Freight Corridor 8 at a kick-off meeting for the Terminals Advisory Group (TAG) and the Railway Advisory Group (RAG).

### **27 November**

Vice-President Siim Kallas and the European Commission's Directorate-General for Mobility and Transport organised the first European transport business summit 'Connect to Compete' in Brussels. CER Chairman Mauro Moretti contributed to the debate.

### **10 December**

The Competitiveness Council reached an agreement on a general approach on the three proposals of the Public Procurement Package aiming at modernising EU public procurement rules.

### **15 December**

The Recast of the First Railway Package (Directive 2012/34/EU of the European Parliament and of the Council of 21 November 2012 establishing a single European railway area) entered in force.

### **18 December**

The European Parliament Committee on Transport and Tourism (TRAN) voted on the European Commission proposal on the revision on the Trans-European Transport Network (TEN-T) Guidelines and the related financial instrument, the Connecting Europe Facility (CEF).

### **20 December**

Council of Ministers in charge of Transport from Belgium, Germany, France, Italy, Luxembourg, the Netherlands and Switzerland, in the presence of Commission Vice-President Siim Kallas, signed an agreement on the allocation of capacity for international freight trains on two international rail freight corridors. The two corridors will link Rotterdam and Antwerp to Genoa and Lyon and Basel.

## **2013**

### **1 January**

Ireland took over the Presidency of the European Union.

### **24 January**

The European Commission adopted the Clean Power for Transport Package.

### **30 January**

The European Commission adopted proposals for a Fourth Railway Package.

### **28 February**

The European Court of Justice (ECJ) delivered its judgments on infringement actions brought by the European Commission against four member states concerning rail transport. The Court did not support the European Commission's submissions for the cases concerning Austria and Germany and declared that the First Railway Package does not require member states to have an institutional separation between the infrastructure manager and the incumbent operator in place.

### **26 March**

The European Commission launched a EUR 66.7 million call for proposals to fight road congestion and make freight transport greener in the framework of the MARCO POLO programme.

### **15 April**

The European Commission published a proposal to revise Directive 1996/53/EEC with the objective to allow megatrucks to cross borders between countries. CER expressed its opposition to this new proposal.

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## List of CER events

(April 2012 - April 2013)

### 2012

#### 2-3 May

About twenty railway delegates, more than twenty-five customs delegates and two representatives from the European Commission's Directorate General for Taxation and Customs Union (DG TAXUD) met in Sopron for their fifty-second joint CER/customs administration/TAXUD meeting.

#### 3 May

The CER General Assembly met in Paris and approved applications for membership from Calea Ferată din Moldova (Railways of Moldova) and HS2 (High Speed Two, UK).

#### 8 May

CER, in cooperation with the Danish EU Presidency, organised a conference at the Bibliothèque Solvay in Brussels. Entitled *Investing in European railways – Are the funds really there?*, the event focused on the targets set in 2011 by the Transport White Paper and the investments required to reach them.



From left to right: ASTOC Chairman and CER Vice-Chairman Jan Sundling, MEP Richard Seeber (EPP, Austria), CER Executive Director Libor Lochman, Permanent Secretary of the Danish Ministry of Transport Jacob Heinsen, DSB Vice-President Peder Nedergaard Nielsen, CEO of DB Schenker Rail Scandinavia Stig Kyster-Hansen, MEP Anne E. Jensen (ALDE, Denmark), European Commission Director European Mobility Network Jean-Eric Paquet

#### 10 May

CER co-organised a workshop in Brussels in conjunction with the International Rail Transport Committee (CIT). More than eighty experts from railway undertakings, national enforcement bodies, European institutions, and other transport stakeholders outlined their experience with Regulation (EC) No 1371/2007 on rail passengers' rights and obligations.

#### 29 May

With the support of MEP Dominique Riquet (EPP, FR), CER launched an exhibition on the financing instruments for railway infrastructure offered by the EU and member states. The objective was to showcase best practice and to suggest how financing could be optimised. *The Mind the gap!* exhibition was on display in the European Parliament from 29 May to 1 June.



From left to right: European Commission Director European Mobility Network Jean-Eric Paquet, MEP Dominique Riquet (EPP, FR), CER Executive Director Libor Lochman

#### 29-30 May

EIM and CER co-organised the annual High-Level Infrastructure Meeting in Paris. The meeting focused on the deployment of ERTMS/ETCS, the use of available funds during times of budgetary constraints and innovative financing instruments, such as PPPs, project bonds and property development.

#### 14 June

CEOs of European rail passenger operators met at the High Level Passenger Meeting in Helsinki to exchange views on further opening the rail passenger market in the EU.

#### 19 June

Together with SNCF, CER organised a debate and a parliamentary lunch on social harmonisation and transfer of staff, based on the results of a benchmark study for urban and rail transport in seven European countries.



From left to right: UITP Director General Alain Flauch, ETF President of the railway section Guy Greivelding, Consultant Stéphane Desselas, AGV MoVe Director General Werner Bayreuther, Director DG Employment and Social Affairs Armino Silva

### 27 June

Vice President of the European Commission and Commissioner for Transport, Siim Kallas, met Guillaume Pepy (CEO SNCF), Rüdiger Grube (CEO DB) and CER Executive Director Libor Lochman to discuss the sector's views on the upcoming Fourth Railway Package.

### 28 June

CER held an informal exchange of views in Brussels between the European Commission, small railway undertakings and several new entrants in the rail passenger market. This exchange focused on the future steps towards liberalisation.

### 5 July

CER and UNIFE held a workshop in Warsaw with the support of PKP. The workshop, entitled *Financing railways – How to make the best use of EU funds* addressed the issue of the absorption of EU funds by the new member states and was part of a series of annual workshops organised in Central and Eastern Europe by the two organisations.



About 100 participants attended the workshop organised by CER and UNIFE in Warsaw

### 17 July

CER Executive Director Libor Lochman met Nedeljko Čubrilović, Minister of Transport of Republika Srpska, and Dragan Savanović, Chief Executive Officer of ŽRS, the local railway company in Banja Luka.

### 17 September

CER General Assembly met in Berlin and approved the applications for membership of TFG (Romania) and UTP (France).

### 18 September

CER's Management Committee met European Commission Vice-President and Transport Commissioner Siim Kallas at the InnoTrans fair in Berlin – an opportunity to discuss all aspects of the upcoming Fourth Railway Package.



Vice-President of the Commission Siim Kallas was accompanied by Deputy Head of Cabinet Keir Fitch (left)

### 25 September

CER met a delegation from the Cypriot Presidency of the Council of the EU in order to discuss the association's views on the Fourth Railway Package.

### 27 September

CER event on TAF for freight new entrants.

### 2 October

CER Executive Director Libor Lochman met the Cypriot Minister for Communications and Works.



Cyprus Minister for Communications and Works Efthemios Flourentzou and CER Executive Director Libor Lochman

### 2 October

CER, EIM and EFRTC (the European Federation of Railway Trackworks Contractors) organised a breakfast briefing in the European Parliament to present a report on rail track maintenance works. Entitled *What is the rail sector doing on rail infrastructure maintenance to become more efficient?*, the workshop was hosted by MEP Ines Ayala Sender (S&D, ES).

### 5 October

CER participated in the European Rail Transport Regulation Forum, held at the Florence School of Regulation. Executive Director Libor Lochman presented the CER position on opening of domestic passenger market.

### 9 October

CER organised a lunch at the European Parliament on accessibility of rail transport for disabled persons and persons with reduced mobility. The lunch, hosted by MEP Georges Bach (EPP, LUX), brought representatives from the European railways, the European Commission and the European Disability Forum together. CER and railway representatives gave a presentation on progress in providing accessibility to the rail mode.

### 16 October

CER participated in the *Railways in Europe – General Mobilisation* Symposium. More than twenty influential leaders from the railway industry contributed to the debate. Amongst them were Mauro Moretti, Chairman of CER and CEO of FS Italiane, and Libor Lochman, CER Executive Director. European Commission Vice-President Siim Kallas, responsible for transport, addressed the audience at the end of the symposium.

## 18 October

Libor Lochman met PKP CEO Jakub Karnowski and PLK CIO Alexander Wołowiec in Warsaw. The meeting focused particularly on their analysis of the current EU legislative scenario, on the implementation of the Recast of the First Railway Package as well as on the European Commission proposal for a Fourth Railway Package.

## 5 November

CER officially published the EVES-Rail study on the economic effects of vertical separation in the railway sector in Brussels. A detailed technical presentation of the study is given, followed by a panel discussion with CER Chairman Mauro Moretti and CER Vice-Chairman Jan Sundling, Brian Simpson for the European Parliament, Keir Fitch and Jean-Eric Paquet for the European Commission, and Didier van de Velde and Professor Chris Nash for the EVES-Rail Consortium.



From left to right: MEP Brian Simpson (S&D, UK), Trasse Schweiz Managing Director Thomas Isenmann, CER Chairman Mauro Moretti

## 6 November

CER joined forces with the Cyprus Presidency to showcase how multimodality works in practice. Around ninety participants, mostly from the permanent representations of EU member states and from the Council, attended a site visit to the Port of Antwerp. Participants discovered how maritime and rail transport can complement each other, with a site visit to a marshalling yard and a freight terminal inside the Port of Antwerp, forming the main rail-based intermodal hub of the port.

## 5 December

The results of the project on 'Insecurity and the feeling of insecurity in rail passenger transport', aiming to prevent, manage, mitigate and reduce insecurity and the feeling of insecurity caused by third-party violence in rail passenger transport in Europe, were presented at a conference organised by CER and the European Transport Worker's Forum (ETF). It is also the occasion of signing the recommendations of the European railway sector social partners: *Promoting security and the feeling of security vis-à-vis third party violence in the European railway sector*.

## 18 December

The third annual CER Information Session on Journey Planning and Ticketing was organised at the European Parliament, under the patronage of MEP Mathieu Grosch (EPP, BE). CER outlined the rail vision for multi-modal transport and emphasised the strength of rail's claim to become the backbone of multi-modal transport in Europe.

## 2013

### 15 January

CER Executive Director Libor Lochman met the outgoing CEO of Irish Rail, Richard Fearn, and the incoming CEO of Irish Rail, David Franks, in Dublin.

### 21 January

CER Executive Director Libor Lochman met the Irish Minister for Transport, Leo Varadkar.



CER Executive Director Libor Lochman and Irish Minister for Transport Leo Varadkar

### 21 January

CER and the Irish Presidency of the European Union held a joint event on the Fourth Railway Package in Brussels, highlighting the needs and expectations in small and/or peripheral member states. The event brought together Ireland's Transport Minister Leo Varadkar (who gave the keynote address), outgoing CEO of Irish Rail Richard Fearn, MEP Roberts Zile (ECR, Latvia), European Commission Director European Mobility Network Jean-Eric Paquet, CEO of WESTbahn Erich Forster, and CER Executive Director Libor Lochman.

### 30-31 January

CER co-organised with the International Air Travel Association (IATA) a workshop about the diversity of partnerships and the potential for increased cooperation between air and rail.

### 20 February

CER held the first of a series of three workshops on the European Commission's proposal for a Fourth Railway Package; a workshop solely dedicated to the members of the European Parliament Committee on Transport and Tourism. A large number of MEPs took part in this first workshop, entitled *The Commission's proposals on ERA, interoperability and safety*, and hosted by MEP Gesine Meissner (ALDE, DE).

### 21 February

CIT and CER organised a kick-off meeting with representatives of NEBs in Bern to prepare for the second workshop with national enforcement bodies (NEBs) on the implementation of Regulation (EC) No 1371/2007 on rail passenger rights.

## 26 February

The European Railway Award 2013 was presented to Benedikt Weibel, former CEO of the Swiss Federal Railways (SBB), for political achievements and to Dr Johannes Nicolin, Technical Director, AAE Holding AG, for technical achievements. Keynote speeches were delivered by European Commission Vice-President Siim Kallas and MEP Brian Simpson (S&D, UK).



*Followed by the joint Annual Reception of CER and UNIFE, the ceremony attracts more than 500 guests from all over Europe, including high-level politicians and transport stakeholders.*

## 27 February

CER General Assembly met in Brussels and approved the full membership of HŽ Putnički Prijevoz and HŽ Cargo, with HŽ Infrastruktura taking over the membership of HŽ Holding.

## 5 March

CER held its second workshop on the Fourth Railway Package at the European Parliament. It was hosted by MEP Michael Cramer (Greens/EFA, DE). The CER position on market opening was presented in detail to MEPs, EP policy advisers and assistants.

## 8 March

CER Executive Director Libor Lochman met Ismet Duman, Deputy Director General of TCDD in Istanbul, to discuss the Railway Bill proposed to the Turkish Parliament. The bill marks a further step in closing the gap between the Turkish rail legislation and the EU rail acquis and is expected to be approved by the end of 2013.

## 13-14 March

The social partners of the railway sector, ETF and CER, organised a workshop in Berlin on competitive tendering and ways of protecting staff in the event of a change of operator.

## 19 March

The Platform for the Electrification of Surface Transport held its maiden event in Brussels. The event, supported by MEP Gesine Meissner (ALDE, DE), underscored the major advantages and the potential for electrification of surface transport in both road and rail, highlighting how different modes can work together.



*MEP Gesine Meissner (ALDE, DE)*

## 20 March

CER held its third workshop on the Fourth Railway Package in the European Parliament. The event focused on the governance of rail companies. The workshop was hosted by MEP Brian Simpson (S&D, UK).

## 21 March

CER organised a breakfast briefing together with other stakeholders representing the energy (EDF, CEZ, Edison, Enel, Iberdrola) and the transport sectors (Aéroport de Paris, CER, UITP/UTP). The debate focused on the possible consequences that the 'Procurement in the water, energy, transport and postal services sectors' Directive might have if not properly amended.

## 21-22 March

CER Executive Director Libor Lochman visited DSB headquarters in Copenhagen and NSB headquarters in Oslo and met Jesper Lok, CEO of DSB, and Geir Isaksen, CEO of NSB.

## 10 April

CER, together with FS Italiane, sponsored a dinner event organised by Rail Forum Europe, entitled *Fourth Railway Package - Towards a Single European railway market*.

## 11 April

Within the framework of the annual CER High Level Freight Meeting, the newly published *Rail Freight Status Report - Rail freight after a decade of EU rail policy* was presented to rail freight CEO's. The meeting focused on the results of the report, as well as the development and management of rail freight corridors and how to increase rail freight productivity with longer, heavier and faster trains. CER members also called on European decision makers to implement the right political measures so that a modal shift towards rail finally becomes reality.

## 23 April

CER and UNIFE organised a working lunch on the European Commission's proposal for a directive on the interoperability of the rail system within the European Union. The lunch brought transport attachés, national experts from EU member states and representatives from DG MOVE together.

## 30 April

The European Commission and CER organised their second annual Climate Change Adaptation Workshop and exchanged views on how to concretely implement the EU's climate change adaptation strategy in the rail sector.



*From left to right: DG Research Programme Officer Eleni Manoli, CER Executive Director Libor Lochman, DG Climate Action Head of Unit Rosário Bento Pais*

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## CER member statistics

CER publishes simple railway statistics of its members every year in order to give the reader a better overview of the activities of each member. The statistics table on the following page shows at one glance the broad range of CER's membership base, which mostly consists of integrated railway companies and railway undertakings of various sizes, including private freight and passenger operators, and others, in Europe.

### Did you know, that...

CER member companies were responsible for 180 266 kilometres or railway lines in 2012. This is equivalent to travelling around the Earth four and a half times.



180 266.3 km

1 333 million tonnes of cargo were transported by CER members in 2012. If this freight were transported by road, it would require over 100 million truck journeys.

1 332.9 million tonnes cargo



CER member companies carried 14.4 billion passengers in 2012. This is twice the entire population of the Earth.



14.4 billion  
passengers

1.2 million jobs are directly created by CER members. This equals 0.4% of the EU's working population.



1.2 million  
jobs

## 2012 CER member statistics

CER Member <sup>a/b</sup>	COUNTRY	Length of lines	Staff number		Passengers carried		Passenger-kilometres		Freight tonnes carried		Freight Tonne-km		Train-km (IM only)		Turnover		EBITDA <sup>d</sup>
		in km	FTE <sup>c</sup>	Δ% 11/12	millions	Δ% 11/12	millions	Δ% 11/12	millions	Δ% 11/12	millions	Δ% 11/12	millions	Δ% 11/12	millions €	Δ% 11/12	millions €
ADIF	ES	13 945 <sup>o</sup>	13 249 <sup>o</sup>	n/a	-	-	-	-	-	-	-	-	185.1 <sup>u</sup>	-2%	n/a	n/a	n/a
ASTOC	SE	-	11 000	-1%	n/a	n/a	11 400	11%	n/a	n/a	21 000	-6%	-	-	n/a	n/a	n/a
ATOC	GB (UK)	-	n/a	n/a	1 507.9	6%	58 708.8	4%	-	-	-	-	-	-	n/a	n/a	n/a
BDŽ Cargo	BG	-	4 057	-3%	-	-	-	-	9.8	-16%	2 043	-18%	-	-	82.9	-12%	3.4
BDŽ PP	BG	-	6 276	-3%	26.5	-10%	1 876	-9%	-	-	-	-	-	-	139.6	-4%	44.7
BE	LV	-	170	-33%	-	-	-	-	3	45%	1 196.5	78%	-	-	20.1	40%	2.9
BLS	CH	520	2 750	-3%	53.8	4%	905	5%	12.8	-13%	3 313	-13%	13.8	0%	640.5	7%	0.2
BRC	BG	-	265	5%	-	-	-	-	2.1	-2%	685	2%	-	-	17.4	-4%	0.5
BTS	LV	-	135 <sup>q</sup>	n/a	-	-	-	-	9.4 <sup>q</sup>	n/a	2 857 <sup>q</sup>	n/a	-	-	n/a	n/a	n/a
Bulmarket	BG	17	98	9%	-	-	-	-	0.7	38%	180	46%	0.4	60%	6.7	38%	1.5
ČD	CZ	-	24 882	-22%	169	2%	6 907	4%	73.4	-7%	13 044	-6%	-	-	1 288.6	-1%	219.2
CER Cargo	HU	-	15	-39%	-	-	-	-	1.9	48%	492.9	40%	-	-	10.7	45%	0.7
CFL	LU	275 <sup>o</sup>	2 895 <sup>o</sup>	n/a	19.7	8%	373	7%	-	-	-	-	8.6 <sup>u</sup>	-2%	n/a	n/a	n/a
CFL Cargo	LU	-	482 <sup>o</sup>	n/a	-	-	-	-	7.8 <sup>o</sup>	n/a	739 <sup>o</sup>	n/a	-	-	n/a	n/a	n/a
CFM	MD	1 157 <sup>o</sup>	10 963 <sup>o</sup>	n/a	4.7 <sup>o</sup>	n/a	363 <sup>o</sup>	n/a	4.6 <sup>o</sup>	n/a	1 172 <sup>o</sup>	n/a	3.6	n/a	n/a	n/a	n/a
CFR	RO	10 777	23 091	-4%	-	-	-	-	-	-	-	-	85.2	-5%	249.5	-8%	289
CFR Călători	RO	7 251	13 645	-2%	48.7	-9%	4 148	-14%	-	-	-	-	57.8	-6%	83.9	-31%	-18.8 <sup>p</sup>
CFR Marfă	RO	-	8 411	-8%	-	-	-	-	27.2	-16%	4 965.5	-10%	-	-	217.6	-17%	-9.2
CP	PT	-	2 924	-7%	112	-11%	3 443.4	-8%	8.7	-5%	2 020	-2%	-	-	236.3	-1%	45.6
DB	DE	33 505	287 508	1%	2 035	6%	82 366	4%	398.7	-3%	105 894	-5%	1 039	-1%	39 296	4%	5 601
DB Schenker DK	DK	-	243 <sup>q</sup>	n/a	-	-	-	-	7.1 <sup>q</sup>	n/a	2 836 <sup>q</sup>	n/a	-	-	n/a	n/a	n/a
DB Schenker NL	NL	-	745 <sup>q</sup>	n/a	-	-	-	-	26.5 <sup>q</sup>	n/a	4 102.7 <sup>q</sup>	n/a	-	-	n/a	n/a	n/a
DB Schenker UK	GB (UK)	-	4 000 <sup>q</sup>	n/a	-	-	-	-	n/a <sup>q</sup>	n/a	n/a <sup>q</sup>	n/a	-	-	n/a	n/a	n/a
DSB	DK	-	8 818	-12%	207.2	-6%	7 644	-24%	-	-	-	-	-	-	1 628.2	0%	316.5
Eurostar	GB (UK)	489 <sup>o</sup>	1 414 <sup>o</sup>	-5%	9.7 <sup>o</sup>	n/a	4 397 <sup>o</sup>	n/a	n/a	n/a	n/a	n/a	-	-	925 <sup>o</sup>	n/a	n/a
EVR	EE	1 280 <sup>o</sup>	1 796 <sup>o</sup>	n/a	-	-	-	-	26.1	-14%	4 823	-20%	n/a	n/a	n/a	n/a	n/a
FS Italiane	IT	16 741	71 930	-2%	512.6	-2%	37 489	-5%	39.5	-6%	11 249.3	-3%	316.4	0%	8 206 <sup>p</sup>	-1%	1 861 <sup>p</sup>
GFR	RO	216	2 511	-4%	-	-	-	-	13.5	10%	4 032	-16%	0.3	137%	182.1 <sup>p</sup>	1%	26 <sup>p</sup>
GySEv/RoeEE	HU/AT	509	2 007	5%	6.9	47%	265	37%	14.1	23%	688	20%	7.4	57%	129.2	18%	1
HSB	AL	424	1 334	-21%	0.4	-1%	15.9	-13%	0.1	-55%	15.3	-69%	0.8	14%	6.3	10%	2.7
HUNGRAIL	HU	-	2	-67%	-	-	-	-	1.4	42%	0.4	51%	-	-	0	10%	n/a
HŽ Cargo	HR	-	2 898	26%	-	-	-	-	11.4	-6%	2 422	-4%	-	-	81.8 <sup>p</sup>	-2%	1.5 <sup>p</sup>
HŽ Infrastructure	HR	2 722	6 436	n/a	-	-	-	-	-	-	-	-	24.8	-8%	134 <sup>p</sup>	n/a	-58.3 <sup>p</sup>
HŽ Passenger	HR	-	2 176	93%	27.7	-45%	1 104	-26%	-	-	-	-	-	-	105.8	-4%	-14.6
ÍÉ	IE	2 400	3 814	-8%	36.9	-1%	1 582.3	-3%	1.4	-7%	229.6	-13%	17.1	8%	387.5	4%	47.1
LDZ	LV	1 859	11 818	1%	0.3	3%	89	7%	60.6	2%	16 930	2%	20.3	2%	96.7 <sup>p</sup>	5%	19.4 <sup>p</sup>
LG	LT	1 767	10 601	1%	4.8	3%	403.2	4%	49.4	-6%	14 172	-6%	14.9	-3%	500.2 <sup>p</sup>	6%	152.5 <sup>p</sup>
MÁV	HU	7 385	37 214	0%	111	0%	5 621	1%	-	-	-	-	97	-6%	447.6 <sup>p</sup>	-5%	227.7 <sup>p</sup>
Montecargo	ME	-	204 <sup>q</sup>	n/a	-	-	-	-	1.2 <sup>q</sup>	n/a	150.7 <sup>q</sup>	n/a	-	-	n/a	n/a	n/a
NRIC	BG	4 070	12 803	-7%	-	-	-	-	-	-	-	-	27.8	-11%	272.4	14%	-8.7
NS	NL	-	9 383 <sup>o</sup>	n/a	313.6 <sup>o</sup>	n/a	16 808 <sup>o</sup>	n/a	-	-	-	-	-	-	n/a	n/a	n/a

## 2012 CER member statistics

CER Member <sup>a/b</sup>	COUNTRY	Length of lines	Staff number		Passengers carried		Passenger-kilometres		Freight tonnes carried		Freight Tonne-km		Train-km (IM only)		Turnover		EBITDA <sup>d</sup>
		in km	FTE <sup>c</sup>	Δ% 11/12	millions	Δ% 11/12	millions	Δ% 11/12	millions	Δ% 11/12	millions	Δ% 11/12	millions	Δ% 11/12	millions €	Δ% 11/12	millions €
NSB	NO	-	10 875	4%	53.8	2%	2 827	4%	-	-	-	-	-	-	1 843.5	17%	349.3
ÖBB	AT	4 894	41 558	-2%	224.1	7%	10 226.7	-1%	106.4	-8%	21 674	-6%	142	-1%	5 244	0%	1 443
OSE	EL	2 554 <sup>p</sup>	2 401	-9%	-	-	-	-	-	-	-	-	12.3 <sup>p</sup>	-2%	66.2	-21%	29.7
PE MZ Infrastructure	MK	699	1 287	-10%	-	-	-	-	-	-	-	-	2.2	-10%	15.9	0%	-0.1
PE MZ Transport	MK	-	1 295	-8%	1	-29%	99.2	-32%	2.5	-8%	423	-12%	-	-	18	-12%	-2.7
PKP	PL	19 617	98 803	-2%	172.8	-6%	14 720	-6%	126.7	-10%	32 904	-12%	160.9	-9%	n/a	n/a	n/a
RCH <sup>w</sup>	HU	-	2 257 <sup>h</sup>	n/a	-	-	-	-	29.1	n/a	5 920	n/a	-	-	n/a	n/a	n/a
Rail Polska	PL	28	330	-6%	-	-	-	-	3.2	-7%	751.7	-13%	1	-12%	n/a	n/a	n/a
RegioTrans Brasov	RO	-	958	n/a	7.8	n/a	391.9	n/a	-	-	-	-	-	-	204.5	n/a	-39.5
RENFE	ES	-	13 893	0%	463.6	-1%	21 143.8	-1%	17.1	-1%	7 049.2	-7%	-	-	1 983.1	-2%	385.6
SBB/CFF/FFS	CH	3 138	29 240	2%	353.8	-1%	17 545	-1%	43.7	-10%	12 123	-2%	170.5 <sup>i</sup>	0%	6 039.2	4%	1 811.2
SLB	AT	-	138	0%	4.7	-1%	n/a	n/a	2.5	39%	n/a	n/a	-	-	n/a	n/a	n/a
SNCB/NMBS	BE	-	18 643	-3%	231.2 <sup>m</sup>	1%	10 857 <sup>m</sup>	0%	34.3	-17%	5 220	-12%	-	-	n/a	n/a	-45.1
SNCB/NMBS Holding	BE	3 592	34 703	-2%	231.2 <sup>m</sup>	1%	10 857 <sup>m</sup>	0%	34.3	-17%	5 220	-12%	99.3	-2%	3 583.1	2%	115.8
SNCF	FR	-	150 652	0%	1 124	2%	85 587	0%	n/a	n/a	n/a	n/a	-	-	19 978	3%	1 885
SŽ	SI	1 209	8 263	-6%	15.5	-1%	742	-4%	14.8	-9%	3 227	-10%	18.9	-3%	449.4 <sup>p</sup>	-6%	48.1 <sup>p</sup>
SŽDC	CZ	9 468	17 399	49%	-	-	-	-	-	-	-	-	161.4	1%	277.5	1%	262.6
TCDD	TR	9 646	26 230	-1%	70	-19%	4 598	-22%	25.7	1%	11 670	0%	35	-13%	356.2	5%	387.3
TFG	RO	-	135 <sup>r</sup>	n/a	-	-	-	-	0.7 <sup>r</sup>	n/a	319 <sup>r</sup>	n/a	-	-	n/a	n/a	n/a
Thalys	BE	-	n/a	n/a	6.6	n/a	2 410	n/a	-	-	-	-	-	-	475.6		n/a
TRAI NOSE	EL	-	1 532 <sup>q</sup>	n/a	15.3 <sup>q</sup>	n/a	1 413.9 <sup>q</sup>	n/a	3.2 <sup>q</sup>	n/a	392.9 <sup>q</sup>	n/a	-	-	108.6 <sup>q</sup>	n/a	n/a
TX Logistik	DE	-	241 <sup>o</sup>	n/a	-	-	-	-	3.8 <sup>o</sup>	n/a	2.7 <sup>o</sup>	n/a	-	-	150 <sup>o</sup>	n/a	-
UTP <sup>i</sup>	FR	-	n/a	n/a	1 124	n/a	85 587	n/a	78.5 <sup>j</sup>	n/a	30 543 <sup>j</sup>	n/a	-	-	n/a	n/a	n/a
Transdev	FR	-	2 736	25%	100.9	30%	4 251	65%	-	-	-	-	-	-	515.1	3%	n/a
VDV <sup>n</sup>	DE	127 002	40 506	n/a	2 204 <sup>o</sup>	n/a	81 751 <sup>o</sup>	n/a	626.2 <sup>o</sup>	n/a	107.5 <sup>o</sup>	n/a	n/a	n/a	n/a	n/a	n/a
VR	FI	-	8 786	-2%	69.3	1%	4 035	4%	35.3	1%	9 275	-1%	-	-	981	1%	143.2
WESTbahn	AT	316	190	n/a	n/a	n/a	505.4	n/a	-	-	-	-	2.9	n/a	n/a	n/a	n/a
WKO	AT	-	n/a	n/a	23	0%	n/a	n/a	4.5	0%	n/a	n/a	n/a	n/a	n/a	n/a	n/a
ŽFBH	BA	601	3 795	0%	0.5	4%	34.7	4%	8.3	-8%	749	-14%	2.7	-4%	68.5	7%	8
ŽICG	ME	249 <sup>o</sup>	812 <sup>o</sup>		-	-	-	-	-	-	-	-	0.9 <sup>u</sup>	-16%	n/a	n/a	n/a
ŽRS	BA	426	3 436	-1%	0.3	-5%	22	5%	5.3	4%	452.3	8%	2.1	5%	36.5	-100%	-1
ŽS	RS	3 809	18 356	-1%	16.6	77%	700	19%	9.5	-25%	2 769	-23%	19	-7%	82.9	-20%	-48.1
ŽSR	SK	3 631	14 474	-9%	-	-	-	-	-	-	-	-	45.1	-1%	215.9 <sup>k</sup>	448%	15.6
ZSSK	SK	-	5 486 <sup>e</sup>	14%	43.4	-5%	2 413	0%	-	-	-	-	-	-	277.8	-3%	-11.6
ZSSK Cargo	SK	-	6 822	-15%	-	-	-	-	35.3	-6%	6 853.8	-6%	-	-	315.2	-15%	58.4

GR	GE	1 566	n/a	-	3.1	n/a	626	n/a	17.1	n/a	5 417	n/a	-	-	n/a	n/a	n/a
JR East	Japan	7 513 <sup>t</sup>	59 130	-1%	6 038 <sup>v</sup>	1%	125 064 <sup>v</sup>	2%	-	-	-	-	-	-	26 069.1 <sup>s</sup>	14%	n/a
TS	CH	-	10	11%	-	-	-	-	-	-	-	-	165.6 <sup>f</sup>	0%	1.6	-5%	0.1
VPE <sup>g</sup>	HU	-	34 <sup>p</sup>	3%	-	-	-	-	-	-	-	-	-	-	2.2 <sup>p</sup>	-3%	0.5 <sup>p</sup>

- Not applicable  
n/a Not available

- a MRCE Dispolok (NL) is also member of CER, but as rolling stock leasing company, it is not listed in the table.
- b High Speed 2 (HS2) is also a member of CER but cannot be listed in the table since operations have not yet begun.
- c Full Time Equivalent
- d Earnings Before Interest, Taxes, Depreciation and Amortization
- e Increase in staff number is a result of the reintegration of maintenance facilities.
- f Path kilometres allocated
- g VPE is an independent capacity allocation body and therefore cannot present traffic data.
- h Includes 1 517 apprentices.
- i The Union of Rail and Public Transportation (UTP) is the organization of urban transport companies and railway companies (freight and passenger) in France.
- j Since the UTP freight was not available, the freight data listed for UTP includes all RU operating freight in France.
- k Income exclusive of subsidies for railway infrastructure operation
- l IM train-km include train-paths used by the infrastructure manager.
- m Passengers carried and passenger-kilometres do not include Eurostar for the years 2012 and 2011, but the Eurostar data was included in the figures for 2010.
- n The Association of German Transport Companies – VDV - is the organisation for Germany's public transport companies and rail freight transport companies
- o 2011 data
- p provisional
- q 2010 data
- r 2009 data
- s The 14% increase in turnover is partially a result the exchange rate conversion. In local currency (YEN) turnover increased by 5.5%.
- t As of 1 April 2012
- u UIC 2012
- v The passenger data corresponds to the fiscal year 2012, which refers to the period 1 April 2011 to 31 March 2012.
- w Rail Cargo Hungaria is a wholly owned subsidiary of ÖBB

# ABBREVIATIONS

<b>ASECAP</b>	European Association with Toll Motorways, Bridges and Tunnels
<b>AVERE</b>	European Association for Battery, Hybrid and Fuel Cell Electric Vehicles
<b>CEEC</b>	Central and Eastern European Countries
<b>CEF</b>	Connecting Europe Facility
<b>CER</b>	Community of European Railway and Infrastructure Companies
<b>CIT</b>	International Rail Transport Committee
<b>CO2</b>	Carbon Dioxide
<b>CNCs</b>	Core network corridors
<b>DG MOVE</b>	Directorate-General Mobility and Transport, European Commission
<b>EBRD</b>	European Banks for Reconstruction and Development
<b>EC</b>	European Commission
<b>EDF</b>	European Disability Forum
<b>EEA</b>	European Environment Agency
<b>EESC</b>	The European Economic and Social Committee
<b>EFRTC</b>	European Federation of Railway Trackwork Contractors
<b>EIA</b>	Environment Impact Assessment
<b>EIB</b>	European Investment Bank
<b>EIM</b>	European Rail Infrastructure Managers
<b>EPF</b>	European Passenger Federation
<b>EPP</b>	European People's Party, European Parliament Political Group
<b>ERA</b>	European Railway Agency
<b>ERTMS</b>	European Rail Traffic Management System
<b>ETCS</b>	European Train Control System
<b>ETF</b>	European Transport Worker's Federation
<b>ETRA</b>	European Tyre recycling Association
<b>EU</b>	European Union
<b>EURELECTRIC</b>	Electricity for Europe
<b>EUROBAT</b>	Association of European Automotive and Industrial Battery Manufacturers
<b>FFG</b>	Freight Focus Group
<b>GRB</b>	Group of Representative Bodies
<b>GHG</b>	Green House Gas
<b>HLGL</b>	High Level Group on Logistics
<b>HRD</b>	Human Resource Directors
<b>IIG</b>	Infrastructure Interest Group
<b>IATA</b>	International Air Transport Association
<b>IM</b>	Infrastructure Manager
<b>IMCO</b>	Committee on Internal Market and Consumer Affairs in the European Parliament
<b>INF TSI</b>	Technical Specifications of Interoperability for Infrastructure

<b>IRU</b>	International Road Transport Union
<b>LHV</b>	Longer and/or Heavier Vehicles
<b>MEP</b>	Member of the European Parliament
<b>MMF</b>	Multiannual Financial Framework
<b>MoU</b>	Memorandum of Understanding
<b>NEBs</b>	National Enforcement Bodies
<b>NRMM</b>	Non Road Mobile Machinery (NRMM)
<b>NOx</b>	Nitrogen Oxides
<b>NSA</b>	National Safety Authority
<b>PSO</b>	Public Service Obligation
<b>PWG</b>	Passenger Working Group
<b>RFCs</b>	Rail freight corridors
<b>RISC</b>	Railway Interoperability and Safety Committee
<b>RNE</b>	RailNetEurope
<b>S&amp;D</b>	Progressive Alliance of Socialists and Democrats, European Parliament Political Group
<b>SBB</b>	Swiss Federal Railways
<b>TAG</b>	Terminals Advisory Group
<b>TAF TSI</b>	Technical Specification for Interoperability on Telematic Applications for Rail Freight Transport
<b>TAP TSI</b>	Technical Specification for Interoperability on Telematic Applications for Rail Passenger Transport
<b>T&amp;E</b>	Transport and Environment
<b>TEN-T</b>	Trans-European Transport Network
<b>TRAN</b>	Committee on Transport and Tourism in the European Parliament
<b>TSI</b>	Technical Specifications for Interoperability
<b>UIC</b>	International Union of Railways
<b>UIRR</b>	International Union of combined Road-Rail transport companies
<b>UITP</b>	International Union of Public Transport
<b>UNIFE</b>	European Railway Industry Association
<b>WB</b>	World Bank

# GLOSSARY

## **Directive 91/440**

Mother Directive 'on the development of the Community's railways', which laid down the foundations for the creation of a European railway market.

## **First Railway Package**

First step towards rail market opening: international freight. Directive 2001/12/EC revises Directive 91/440, Directive 2001/13/EC revises Directive 95/18, Directive 2001/14/EC repeals Directive 95/19, Directive 2001/16/EC deals with interoperability of the conventional rail system.

## **Second Railway Package**

Second step towards market opening – entire freight market. Directive 2004/51/EC revises Directive 91/440 ff, Directive 2004/49/EC on safety revises Directive 95/18 ff, Directive 2004/50/EC combines the high-speed and conventional interoperability Directives, Regulation (EC) 881/2004 establishes the European Railway Agency ERA.

## **Third Railway Package**

Third step towards rail market opening – for passenger market. Regulation 1371/2007 on Passenger rights, Passenger liberalisation Directive 2007/58 and Train crew certification Directive 2007/59.

## **Recast of the First Railway Package**

The Recast of the First Railway Package (now Directive 2012/34/EU), was approved by the Council of the EU on 21 November 2012, and published in the Official Journal of the EU on 14 December 2012. The new directive repeals Directives 91/440/EEC, 95/18/EC and 2001/14/EC.

## **Fourth Railway Package**

The European Commission adopted the Fourth Railway Package on 30 January 2013. The Package consists of three pillars: governance of the railway system, market opening, and a technical pillar.

## **Transport White Paper**

Commission Communication setting out the EU transport policy for the next ten years, including perspectives up to 2050.

## **TEN-T Guidelines**

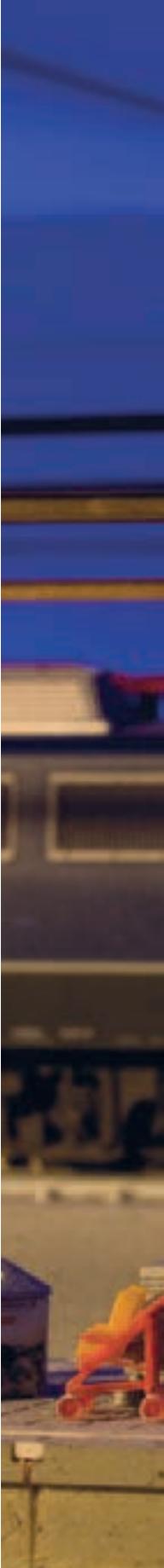
European Commission proposal that sets the strategic framework for transport infrastructure investment until 2050.

## **Connecting Europe Facility**

Related to TEN-T, new integrated financial instrument which defines, as a common financial framework and part of the Multiannual Financial Framework (MFF) 2014-2020, the conditions, the methods and the procedures for providing European Union financial aid to support projects in the transport, energy and telecommunication infrastructures.







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