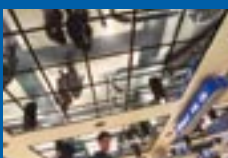




ANNUAL REPORT 2007/2008

1988 20 years 2008

The Voice of European Railways



COMMUNITY OF EUROPEAN RAILWAY AND INFRASTRUCTURE COMPANIES
COMMUNAUTÉ EUROPÉENNE DU RAIL ET DES COMPAGNIES D'INFRASTRUCTURE
GEMEINSCHAFT DER EUROPÄISCHEN BAHNEN UND INFRASTRUKTURGESELLSCHAFTEN

TABLE OF CONTENTS

FOREWORD	2
GUEST CONTRIBUTION	
Vice-President of the European Commission responsible for Transport	
Jacques Barrot	4
IN FOCUS	
Promoting rail freight corridors	6
Transport policy of the European Commission	6
Communication on a rail freight network	8
CER concept for a Primary European Rail Freight Network	9
Challenges for the future	11
External Costs of Transport and the Revision of the Eurovignette Directive	13
An unbalanced situation in the European freight market	13
The Eurovignette Directive – a tool for a solution?	14
Signs of progress – latest EU development	15
Follow the Swiss!	16
Interview with Werner Rothengatter	17
OTHER RAIL POLICY DEVELOPMENTS	
The risks of mega-trucks on Europe’s roads	19
Developments regarding rail passenger transport	20
Financing rail transport	23
Progress on social dialogue	25
Customs and security	27
Further progress on interoperability legislation	29
Chronology: Political events 2007/2008	30
CER EVENTS 2007/2008	
Conference “Fighting climate change – The potential of rail transport”	34
First European Railway Award	35
Chronology of CER activities	36
ABOUT CER	
Member railway and infrastructure companies	42
CER governance	46
CER Team	52
CER publications 2007/2008	54
RAILWAY STATISTICS 2007	55
LIST OF ABBREVIATIONS	58
20 YEARS OF CER: TIME LINE 1988 - 2008	61



FOREWORD

2008 is a significant year for CER and a crucial year for rail transport in Europe.

This year, CER and the European railway and infrastructure companies can look back on 20 years of cooperation with the European institutions in shaping European transport policy. In 1988, the European railways realised that the era of national business would come to an end in rail transport. After the signing of the European Single Act in 1987, other sectors were already preparing for the internal market, an “area without internal frontiers in which the free movement of goods, persons, services and capital is ensured.” Even if railways, at the time, were still state-owned public service providers with a clearly limited national area of activity, it became clear that EU legislators would shift their attention to rail transport.

The European railways prepared themselves for the EU’s political activities regarding their sector by setting up a joint office in Brussels, the “Community of European Railways” in 1988. The main task was and still is today to provide business expertise to staff in the EU institutions and to inform railway and infrastructure companies of the activities of the institutions in Brussels.

Since then, CER has grown from 12 to 70 members and became the “Community of European Railway and Infrastructure Companies”. This development not only reflects the enlargement of the EU from 12 to 27 Member States, but is also a result of the opening and liberalisation of the railway market, a key objective of EU rail transport policy over the last 20 years.

With the overall objective to create an integrated European transport area, a comprehensive European legislative framework was set up, ranging from the corporate structure of railway companies, their relation to the state and the infrastructure manager, to rules for competitive behaviour and harmonised technical standards.

CER has always been a reliable partner for the EU institutions, providing a single “voice of the European railways”. This annual report illustrates once again our activities and commitment to help bring about good policy. Conversely, even if the rail sector has not always agreed with certain political decisions, we have always felt that there was a basic consensus in Brussels, namely that one cannot think “Europe” without “rail transport”.

Today, with a growing awareness of the risks of climate change, this consensus is receiving more weight. Therefore, 2008 will be a crucial year for the future of transport in Europe. In June 2008, Commission Vice-President Jacques Barrot will present a proposal for another Eurovignette Directive revision. Afterwards the Parliament and the Council will discuss and fix their positions on the issue. Hopefully, Commission, Parliament and Council will pave the way for transparency and responsibility in the European transport system: supporting the principle of consumers paying for the impact of their choices on the whole of society; and rewarding those who contribute to the reduction of greenhouse gas emissions through the use of environmentally friendly modes of transport.

The introduction of the “polluter-pays” principle will significantly change the European transport system. Today, strawberries, yoghurt and other low-value products are transported by truck across the whole continent, contributing through their CO₂ emissions to climate change. The growing demand for passenger mobility in urban areas definitely increases the problem of congestion, local pollution and accidents in the cities. However, the bill for dealing with these external effects is paid by all taxpayers, not only by those who are using road transport services and causing the external effects.

The European Commission’s IMPACT study - of which the first deliverable was presented in January 2008 – clearly points out that these external effects carry a price tag which the polluter should pay for. If these costs were included, there would clearly be a “low-cost option”, namely rail transport. If one looks into freight traffic, transport by Heavy Goods Vehicles generates € 71 in external costs per 1000km, whereas rail transport accounts for only a quarter of it. For passenger transport, the low-cost argument applies as well: A railway passenger produces less than a third of CO₂ for a journey than a person using the car.

If polluters have to pay for these costs, it may give them an incentive to opt for a solution with lower external costs which would also be in the interest of society at large. If the polluter does not, society will also benefit: the additional funds could relieve national budgets by providing money for the necessary investments in environmentally-friendly transport infrastructure.

So let’s use the opportunity of the Eurovignette Directive revision to create a level playing field and ensure that society can benefit from the real low-cost mode of transport!



Aad Veenman
CER Chairman



Johannes Ludewig
CER Executive Director

VICE-PRESIDENT OF THE EUROPEAN COMMISSION RESPONSIBLE FOR TRANSPORT JACQUES BARROT



Since the creation of the European Community one of its principal goals has been to promote the efficiency and competitiveness of the common market notably through the opening up of national markets, the elimination of cross border barriers and closer economic integration. Efficient and reliable transport is a key factor and a necessary condition for achieving these objectives. Beside being efficient, a transport system shall however also be environmentally and socially responsible. Therefore, an important aim of the European transport policy has been to ensure that all modes are reducing their pollution and emissions and optimize to shift the transportation of goods and people from road to rail, which is a safe and environmentally friendly mode of transport. This means in particular, in all relevant cases the different transport modes need to be in combination with each other.

The European Community is strongly committed to strengthen the position of railways and to create an integrated European Railway Area. In order to achieve these goals, it has undertaken numerous initiatives aiming at opening the market for rail freight services, introducing a higher level of rail interoperability and a common approach to safety, and dynamically developing rail transport infrastructure. After the initial set of European legislative acts of the 1990s that prepared ground for the restructuring of the railway sector, the rail freight transport market has been fully opened to competition and a non-discriminatory access to rail infrastructure has to be implemented. Today, any railway undertaking which had been licensed in accordance with Community criteria may provide national and international rail freight services in the whole EU territory.

With the elaboration of the Technical Specifications for Interoperability of the high-speed and the conventional trans-European rail systems, the Community to a large extent addressed challenges arising from the technical incompatibility of the national rail networks. Moreover, the European legislator introduced a harmonised framework for rail safety throughout the EU. Since two years, the effective implementation of the Community's legislation in the field of railway interoperability and safety is being supported by the technical expertise of the European Railway Agency.

The European Community has been also actively assisting the development of rail infrastructure by co-financing numerous transport projects through the budget for the trans-European transport network, the Regional Fund and the Cohesion Fund. For the next programming period 2007-2013, the TEN-T budget will contribute with € 8 billion to funding investments primarily in the 30 priority projects which will mainly benefit to railways. In addition, the cohesion countries will receive around € 30 billion for transport projects.

Although the transformation process of the rail transport market is already at a very advanced stage, it is not yet completed. A full and correct implementation of the EC legislation, the development of a rail freight network ensuring more efficient and reliable rail freight services, facilitation of the cross-acceptance of rolling stock and a wide deployment of the single signaling and speed control system ERTMS remain the most important challenges in this respect which the European Community will be facing in the coming years.

VICE-PRESIDENT OF THE EUROPEAN COMMISSION
RESPONSIBLE FOR TRANSPORT JACQUES BARROT

Since its establishment in 1988, the Community of European Railway and Infrastructure Companies has been very actively following and assisting the process of restructuring the rail transport sector. For years, CER has helped its constituents to better understand and take into account the challenges they face as market actors. It has played an important role in shaping the European Community's rail policy by providing the relevant policy makers with constructive feedback on their initiatives and ensuring a regular information exchange between the representatives of the railway undertakings and the European institutions. I want to thank CER and Mr Ludewig personally for this contribution.

Me and my services are fully committed to pursue our efforts in developing an integrated and competitive European rail market which shall serve as a sound basis for a sustainable and efficient transport system. Based on the experiences of the last twenty years, I am confident that the Community of European Railway and Infrastructure Companies, as a strong voice of European railway undertakings, will further actively support the European policy makers in developing rail transport policy that will best reflect the needs of today's railways.

Jacques Barrot

PROMOTING RAIL FREIGHT CORRIDORS

Transport policy of the European Commission

In the past year, one of the most important issues for CER was the development of European rail freight corridors. CER first considered the idea for rail corridors in 2003, when it developed a diagnosis and action plan for three European cross-border corridors. Since then, this idea has been taken up by politicians too. For instance, the Trans-European Transport Network (TEN-T) and the six corridors which were chosen to implement the European Rail Traffic Management System (ERTMS) are illustrations of how a corridor approach is a necessary first step for the coherent development of any large investment project in a network. The European Commission is now making the development of rail freight corridors one of the cornerstones of its policy on rail transport.

Five years after the publication of its White Paper on “European Transport Policy for 2020: Time to Decide”, the European Commission is now dealing with the two – of the original three – remaining major pillars of its intended policy on revitalising rail freight. These three pillars are liberalisation, a fair treatment of different transport modes, and investments in a modern, interoperable rail infrastructure (cf. figure next page).

As the first pillar, liberalisation, has been the focus of European legislation in recent years, it is currently well under way. On 1 January 2007, the rail freight market was completely opened after several years of progressive liberalisation. Although it is yet too early to draw any conclusions, one can already see increased competition in the rail industry. The legal framework for market opening has also been put in place, thus encouraging competition. As interoperability is essential for an open market, we see that work in that domain is also progressing (see page 28 on interoperability).

With the first pillar firmly in place, the remaining issues of investments in rail infrastructure and fair charging for all transport modes are now on the political agenda. These issues are also clearly linked. On 4 February 2008, Vice-President of the European Commission, Jacques Barrot, announced in the French newspaper “Les Echos” that he intends to put the issue of investments on the agenda of the Transport Council this year¹. The other major issue that the Commission intends to address this year is the revision of the Eurovignette Directive and the internalisation of external costs in road transport through road tolls. (See page 13 on the Eurovignette).

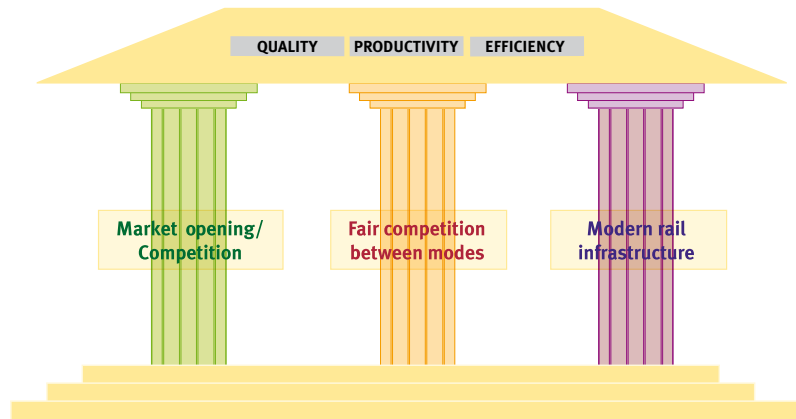


1. Les Echos, 4 February 2008.

PROMOTING RAIL FREIGHT CORRIDORS

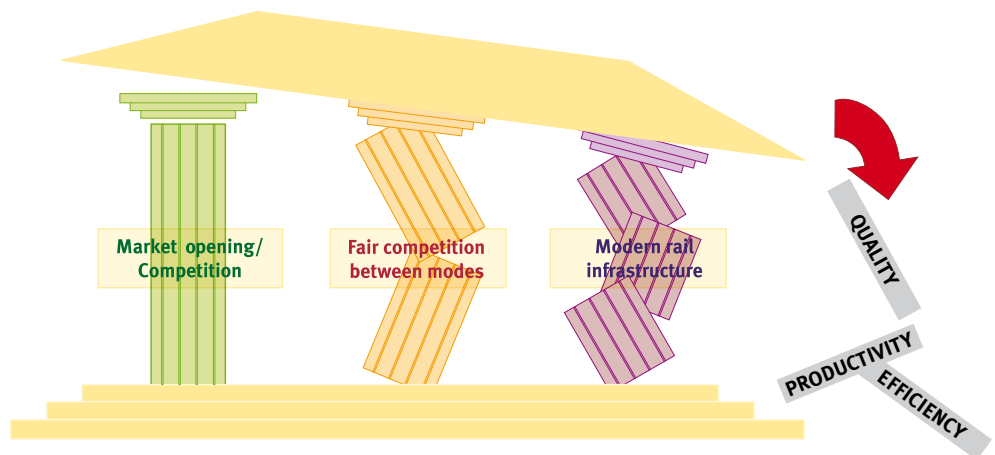
The original architecture of European transport and rail policy
(as set out in the “2001 White Paper”)

In the 2001 White Paper, the European railway policy rests on 3 pillars’



Six years on, the weak points of current European transport policy

One “almost” straight “pillar” and two neglected “pillars”



Until recently, the discussions on infrastructure investment and fair charging were running separately, as European politicians did not seem to make the link between the two dossiers. CER has always supported the idea that proceeds from road tolls – resulting from the internalisation of external costs – should be used to finance much needed infrastructure investments in environmentally less damaging modes. As the case of Switzerland shows, road tolls are a viable alternative to resorting to shrinking state and EU budgets. In the same article in “Les Echos”, Vice-President Barrot expressed his wish that “the future ‘Ecotaxe’, that will be imposed on trucks, is used for the modernisation of the road network and development of alternative modes of transport”.

Communication on a rail freight network

On 18 October 2007, the European Commission issued the Communication “Towards a rail network giving priority to freight” (COM(2007)608), setting its main political goals for the years to come. Generally, CER feels positive about this Communication. CER welcomes the fact that the Commission has given infrastructure investments more prominence in the measures considered in this Communication than it did in its consultation paper of May 2006. In the list of measures proposed, investments now rank third instead of second last as it did in the previous consultation paper. Infrastructure investments play an essential role in building a proper freight network. In this respect, the Communication could have focused more on the current insufficiencies of both EU and national budgets and could have been more daring in proposing at least indicative financial commitment levels.

CER also welcomes the Commission’s intention to create corridor structures. However, to be efficient, these corridors structures must be steered at the highest level. This is why CER is promoting the idea of organising ministerial conferences along each corridor, whereby ministers of countries along a corridor meet each other, e.g. at the margin of a Transport Council. This would give them the opportunity to discuss needs and give recommendations regarding the national investments to cater for the needs of international freight on corridors.

It is important to stress that there is no need for these structures to be defined legally: only political will is needed, with a clear political mandate from the ministers concerned. If a legal structure is necessary, this can be easily done by setting up a European Economic Interest Grouping (EEIG). Also, the corridors should not be defined by law. The best way to proceed would be to adopt a “learning by doing” approach, whereby the corridor structures define the exact perimeter of the corridor themselves to fit market realities. It is therefore essential that railway companies are represented in the corridor structures alongside Member States and Infrastructure Managers.

One of the other initiatives from the Commission’s Communication is to implement measures to harmonise priority rules at service planning level and to give more priority to freight in case of traffic disruptions. Priority rules, although necessary in all systems to handle conflict situations, should, in principle, not be used too often when planning operations. The frequent use of priority rules during the planning stage is a sign that the system is inadequate. CER recommends that priority rules are not fixed by European law following a top-down approach. Instead, CER proposes that priority rules are discussed at “corridor structure” level. In doing so, their impact on the network as a whole has to be taken into consideration; it is essential that a distinction between priority rules at planning level and priority rules at operational level is made.



CER concept for a Primary European Rail Freight Network

CER approves the Commission's approach, as mentioned in its Communication on a rail freight network, to analyse investment needs and coordinate national investment plans on corridors. As mentioned, CER started considering corridors in 2003 when the first corridor studies were published. This idea was further developed last year, when CER together with McKinsey ran business cases on six major trans-European corridors to demonstrate the benefits from investing in rail infrastructure. The selected corridors originated from the six ERTMS corridors.

Figure 1: Six corridors investigated to support the concept of a Primary Freight Network



The results of these business cases formed the basis of the CER concept for a “Primary European Rail Freight Network” (PERFN). This network would consist of a core rail network of freight-dedicated and mixed-traffic trans-European lines. It can be defined as the backbone of a wider network catering for rail freight needs. The PERFN should provide enough capacity to absorb rail freight growth of up to 72% until 2020. In the context of expected general transport growth of 30% to 43% during the same period, this would mean an increase of the rail modal share from 17% in 2006 to potentially 21% - 23% in 2020.

The 72% extra capacity would be obtained as follows:

- 20% through the productivity gains of the railway system (future technological advances and the optimisation of existing capacity);
- 41% through investments in relieving infrastructure bottlenecks; and
- 11% through infrastructure upgrades, notably, to accommodate trains of 750m and longer.

PROMOTING RAIL FREIGHT CORRIDORS



To achieve this, up to € 145.4 billion will be needed over the next 15 years for the six chosen corridors; of which € 35.5 billion has already been committed in existing budgets. Therefore, € 109.9 billion would have to be found over the next 14 years. Also, it is likely that an equivalent amount would be needed to change the rest of the freight-relevant network.

Of this € 145.4 billion, around 3.5% (€ 5.1 billion) would be spent on infrastructure upgrades, mostly to allow longer trains on the PERFN, and around 84.5% (€ 122.9 billion) would be spent on relieving bottlenecks (congested nodes and lines) and expanding existing freight terminals and marshalling yards.

About € 17.4 billion (12%) would be spent on ERTMS fitting (including adaptations of “interlockings” in relevant countries and on-board equipment)². In the years to come, ERTMS will play a major role as the common European signalling and train control system. The European ERTMS coordinator Karel Vinck points out that the benefits of implementing ERTMS can only be reached, if capacity is increased at the same time.



In October 2007, CER published the results of its analysis of 6 European freight corridors in a publication: “Towards a Primary European Rail Freight Network. The CER concept”. The publication is available for download on www.cer.be and can be ordered from cer@cer.be.

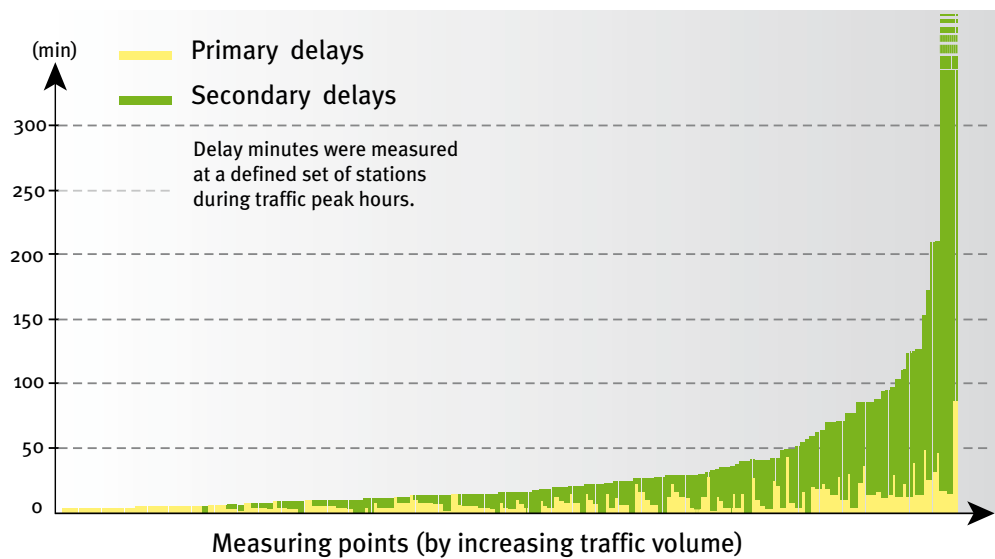
2. ERTMS investment data taken from the 2006 ERTMS corridor reports of the European Commission.

Challenges for the future

The limited infrastructure capacity remains a major bottleneck. Today, rail freight operators find it increasingly difficult to reconcile improving punctuality and growing freight volumes with increasing infrastructure congestion. A recent strategic research study by BSL Management Consultants – on behalf of CER – leaves no doubt about the role of infrastructure congestion in freight quality³. Working with 12 railways on infrastructure issues in the past few years, BSL found that 20% to 50% of quality failures can be directly linked to infrastructure problems. More importantly, BSL shows that the failures attributed to rail freight operators are often the “secondary” consequence of a “primary” infrastructure cause and that secondary delays grow as an exponential function of infrastructure utilisation (see chart below).

A concrete consequence of this phenomenon can be seen in the Netherlands, where punctuality of all trains (freight and passenger) during congested week days peaks at 83%, while reaching 90% during the less busy weekends.

Figure 2: Accumulated delay minutes caused by infrastructure failures



It is, therefore, essential that investments in infrastructure are better coordinated between Member States. Investments are already being made to improve rail infrastructure, but in a very isolated way. For example, on the most advanced rail freight corridor in Europe, Rotterdam-Genoa, projects such as the Betuwe route and the Lötschberg tunnel have been realised, but, in the intermediate sections, progress is limited. Existing corridor structures, such as ERTMS and some TEN priority projects, should be reinforced and, above all, placed under the leadership of the ministers responsible for that corridor, with the support of the European Commissioner for Transport. Regular reporting should be made to the ministers, for instance in a conference held at the margin of Transport Council meetings, enabling them to decide on next steps.

3. BSL Management Consultants GmbH & Co. kg, “Drivers and Challenges for Rail Freight Quality in the European Market”. Strategic Research Paper, Hamburg (August 2007).

PROMOTING RAIL FREIGHT CORRIDORS

Today, it is likely that such conferences will emerge. Slovenia, France and Sweden – Member States which hold the Council Presidencies today or in the near future – have already expressed their interest in such conferences. CER supports this process, and has been working with the Slovenian Presidency in recent months. CER will work in the second half of 2008 with the French Presidency to set up these conferences.



In January 2008, CER published an essay by Henry Posner III, Chairman of the US Railroad Development Corporation. Posner compares the rail freight markets in the US with those in continental Europe and provides some highly insightful analysis into why US rail freight market shares are significantly higher than those in Western Europe. The essay is available for download at www.cer.be and can be ordered at cer@cer.be.

EXTERNAL COSTS OF TRANSPORT AND THE REVISION OF THE EUROVIGNETTE DIRECTIVE

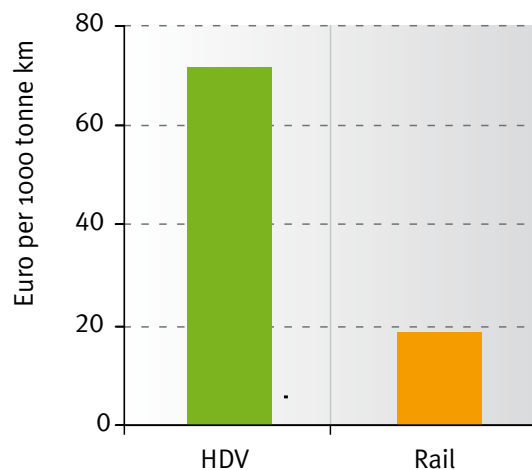
An unbalanced situation in the European freight market

Europe is literally on the move. According to the latest available EU data, freight volumes reached 3 900 billion tonne kilometres in 2005 for the EU-25⁴. Even more, freight transport is expected to follow a positive trend and grow between 30% and 43% for the period 2006 – 2020. Road freight has played an important role and will continue to do so in future. However, it is necessary to consider that the development of the transport modes in Europe is not balanced. This fact was acknowledged by the European Commission in the Mid-term Review of the 2001 Transport White Paper.

The projected increase in traffic demand can simply not be discussed without considering the real costs to society and the economy⁵. Every motorist has been in a traffic jam involving numerous lorries on the roads. While congestion is there for anyone to see, one should also consider the emissions from all these vehicles, the noise, and the risk of accidents. Awareness of these issues and the influence of transport on global warming have increased significantly over the last years. Nevertheless, these external costs are hardly ever included in the price that the user of transport services pays.

The high external costs of road transport have been well documented in numerous scientific studies. According to the INFRAS/IWW Study⁶ – shown in the figure – the average external costs of Heavy Goods Vehicles (HGV) amount to about € 71 per 1000 tonne kilometre, which is four times higher than that of rail freight. At the same time, the over-development of Heavy Goods Vehicles means that they are responsible for 25% of the total external costs compared to less than 1% for rail.

Figure 3: Average External Costs (2000 - without congestion)



Source INFRAS/IWW (2004)



4. European Union: Energy and Transport in Figures, 2006.
5. According to the UNITE study the environmental cost of transport has been estimated at 1.1% of GDP. For more information see: UNITE project – final report, www.its.leeds.ac.uk/unite/.
6. INFRAS/IWW (2004). For more information see: <http://www.uic.asso.fr/ef/publication/>.

The economic characteristics of rail (high fixed costs and low variable costs) show that – in the modern world of logistics and combined transport – rail offers a competitive advantage over long distances. At the same time, moving goods by rail minimises the external costs. Unfortunately, in many cases, lack of sufficient funding has not allowed the development of railways. An increase in investments is necessary to allow railways to improve their quality of service and utilise their full potential.

EXTERNAL COSTS OF TRANSPORT AND THE REVISION OF THE EUROVIGNETTE DIRECTIVE



The Eurovignette Directive – a tool for a solution?

The Directive on the charging of heavy goods vehicles for the use of certain infrastructures (the so-called Eurovignette Directive⁷) was first passed in 1993 to provide guidelines on charging trucks for road use. It sets a maximum level of tolls on European roads and was originally intended to prevent countries from charging road users excessively. Since then, it has been amended twice – in 1999 and 2006 – and the scope of the Directive widened.

However, apart from some minor exceptions (such as the EURO emission standards), the Directive does not allow for the internalisation of external costs, in other words, it is not applying the “polluter pays” principle. In contrast, Directive 2001/14 for the rail sector already allows for external costs to be taken into consideration in the infrastructure charges. This means that competition between rail and road is fundamentally distorted. Furthermore, road along with maritime transport are the only modes not participating in the Emissions Trading System (ETS). Airlines will be covered as of 2011 – 2012, while railways (with 80% of total traffic by electric traction) participate through the full inclusion of the electricity generating sector in the ETS.

In its current form, the Eurovignette Directive is contributing to the unbalanced situation in the European transport sector. This is because:

- The low road charges do not reflect real costs. This means that it is not the user that pays for the external costs of road transport but the European taxpayers in general.
- Little incentive is provided for logistic operators to use rail rather than road over long distances; railways are at a competitive disadvantage.

The absence of charging road users for external costs discriminates against rail and will prolong the environmental damage caused by road vehicles. CER believes that it is crucial to revise the Eurovignette Directive, thus allowing Member States to internalise the external costs of road freight. This would not only help to curb the external costs of transport, but also create a level playing field for all transport modes and allow the rail sector to compete on an equal footing with other modes.

7. Directive 2006/38/EC of the European Parliament and of the Council of 17 May 2006 amending Directive 1999/62/EC on the charging of heavy goods vehicles for the use of certain infrastructures.

Signs of progress – latest EU development

In the latest revision of the Eurovignette Directive, the Commission was asked to present, no later than 10 June 2008, “a model for the assessment of all external costs to serve as the basis for future calculations of infrastructure charges”, together with an “impact analysis on the internalisation of external costs and a strategy for a stepwise implementation of this model for all modes of transport”. The Commission could also decide to present a proposal for the revision of the Directive, if it deems it “appropriate”. To meet its obligations, the Commission launched a new study (‘IMPACT’) in 2007⁸. The aim was not to recalculate external costs, but to narrow down the wide-ranging estimates from previous research.

The Commission also organised two stakeholder workshops, on 15 March 2007 and 31 January 2008. During the second event, the Commission officially presented the “Handbook on estimation of external costs in the transport sector”, which is the first deliverable of the IMPACT study. CER welcomes the study, which provides the necessary first step and a good basis for internalising external costs. The study points out that “... there is consensus at scientific level that external costs of transport can be measured by best practice approaches and that general figures are ready for policy use ... the transfer of available values into transport price levels needs additional decisions made by the policy makers”⁹. It is also clearly underlined that rail transport is a much more environmentally friendly mode compared to road¹⁰.

During the previous process of revising the Directive in the period 2005 – 2006, CER worked to get support for the internalisation of external costs from the Commission, the European Parliament and the European Council. Following the disappointing end-result of this process, CER made a firm decision to keep the issue open, pushing for a new revision of the Directive. In this context, CER participated actively in the debates, highlighting the importance of revising the Directive to create a level playing field and reduce the external effects of transport, and urged the Commission to take action as soon as possible. The fact that it has taken a relatively short period (only 2 years) to convince the institutions that this is the way to proceed, confirms that CER’s position has been coherent and correct.

During the workshop on 31 January 2008, the Commission presented the results of its open consultation on external cost, made through internet submissions and completed on 31 December 2007. The results were generally positive as the majority of respondents (81%) supported the importance of internalising the external costs of transport.

The position of the European Parliament has been supportive to the inclusion of external costs in the Eurovignette Directive. This was shown during the latest process of revision in December 2005, when the European Parliament voted to include external costs up to 160% of the direct costs of transport – a position that later did not pass through the European Council. During last year, the European Parliament underlined the importance of the internalisation of external costs, on a number of occasions, and urged the Commission to proceed with revising the Eurovignette Directive¹¹. However, the most important development was Vice-President Barrot’s decision to complete the requested study and proceed with the revision of the Directive, with the objective to allow for charging of external costs. He communicated his decision in his address to the European Parliament in December 2007 and also during the stakeholder conference in January 2008. The revised Directive would provide an overall framework of differentiated access charging (depending on vehicle type, area, time of day) for the Member States, while respecting the subsidiarity principle. This means that it is up to each Member State to decide if it will apply the Directive or not. The internalisation methodology, although valid for all modes of transport, would first be applied to Heavy Goods Vehicles (HGVs), and – only in a second stage – to other modes of transport.



8. IMPACT stands for Internalisation Measures and Policies for All external Cost of Transport.

9. CE Delft (2007), Handbook on estimation of external costs in the transport sector, (p.13). The Handbook is available at: http://ec.europa.eu/transport/costs/index_en.htm.

10. According to the Handbook (p. 8) “The evidence shows that road transport has by far the largest share in total external costs of transport”.

11. The latest being:

- Plenary Session: Initiative report on the implementation of 1st Railway Package, July 2007,
- Committee on Environment, Public Health and Food Safety: Report on the Green Paper on market-based instruments for environment and related policy purposes, January 2008 and
- Committee on Transport and Tourism: Report on a sustainable European transport policy, 22nd January 2008.

EXTERNAL COSTS OF TRANSPORT AND THE REVISION OF THE EUROVIGNETTE DIRECTIVE

CER welcomes this development as a step in the right direction. Finally, a level playing field in the transportation market seems possible, and thereby also a more sustainable transport system. It is important to note that this is not primarily a question of competition between different transport modes. Rather, modern transport logistics is about combining road and rail into a low-cost high-quality solution for the customer. The aim of the road charges must be to confront long-distance transports with their full costs and, consequently, charges may increase for these journeys.

Follow the Swiss!

The experience of Switzerland is a valuable example. To proceed with the development of a sustainable transport system, a political commitment was made to shift freight crossing the sensitive Alpine environment from road to rail. This was approved repeatedly by the Swiss population in censuses and led to the introduction of tolls on trucks, including external costs.

The Swiss Heavy Vehicle Fee (HVF), covering the whole road network, was gradually introduced in 2001. This is a distance-based diversified charge (depending on weight and emissions) for all vehicles above 3.5 tonnes, amounting to 0.0275 Swiss francs per tonne kilometre.

The outcomes of this measure were positive, as the number of Heavy Goods Vehicles was cut by 16% between 2000 and 2006. Combined transport reached 17 million tonnes, while the modal split for transalpine rail freight reached 66%. The introduction of the fee has also led to a rise in productivity for road freight, as average load factors increased and the number of empty vehicles decreased. To improve the quality of rail services and facilitate the modal shift, the Swiss transport policy allocates two thirds of the revenues of the HVF to fund rail projects.



EXTERNAL COSTS OF TRANSPORT AND THE REVISION OF THE EUROVIGNETTE DIRECTIVE

Interview with Werner Rothengatter



Werner Rothengatter is Professor of Economics at the University of Karlsruhe. He is a well-known expert on transport modelling, pricing, environmental impact and assessment.

Why is the internalisation of external costs of transport such an important issue?

WR: External costs are not covered by their producer and, therefore, lead to wrong allocations and incentives in the economy. In the transport sector, they distort the competition between modes: those that are environmentally friendly and safe, and others that are not. Externalities can be local, for instance the emission of noise, or global, such as the emission of climate gases. They can influence the present generation or negatively affect future generations. There is a broad consensus that the global externalities of climate change have become the biggest challenge for mankind since the industrial revolution.

External costs result from problems such as climate change, air pollution, accidents, noise and congestion. Do all transport modes have the same impact? Where, do you believe, should a strategy for reducing external costs start?

WR: All transport modes have quite a different external impact. Focusing on the externalities of accidents and the environment only, about 92% of external costs of transport are contributed by road, 6% by aviation, and 2% by rail. Road transport produces about four times higher external costs per passenger or tonne kilometer compared with rail. Inland waterway shipping and coastal shipping could be environmentally much more efficient, if better quality fuel was used. The same holds for maritime shipping where the dirtiest fuel is burnt. It would be quite natural to start an internalisation strategy with those modes which are most problematic and show low marginal costs of mitigation. This means that road transport and partly the shipping industry (fuel quality) should have priority for internalisation measures. The railway industry would be affected insofar as there is some potential for cleaner transport through substituting old and inefficient diesel traction technology.

Recently, the Commission published its Handbook on the estimation of external cost of transport. Do you think this a good starting point to proceed with the internalisation of external costs?

WR: The Handbook is a good starting point insofar as it gives guidelines to calculate the external costs, and also shows in which sectors the highest reductions are possible. It summarises the results of the relevant studies in this field and gives intervals for the evaluation of different effects. This is important as the main argument of the opponents of the internalisation policy is that there is still much uncertainty about the extent of impacts and their evaluation. The Handbook shows, on the contrary, that the external cost estimations are accurate, which allows for building political strategies based on the data.





THE RISKS OF MEGA-TRUCKS ON EUROPE'S ROADS

In 2007, a debate started which, at first glance, seemed to be of little interest for the railway sector: the possible circulation of “mega-trucks”. Mega-trucks are trucks of up to 25.25 metre and 60 tonnes. Directive 96/53, which sets out the maximum weight and dimensions of road vehicles, offers Member States the possibility to allow such trucks to circulate in their country, provided they do not affect international competition. Only Sweden and Finland have made use of this possibility so far. At the time of adoption of Directive 96/53, all other Member States committed themselves to refrain from allowing such trucks on their territory until the European Commission had carried out a study examining the possible consequences of allowing mega-trucks.

In the mean time however, some Member States have started trial projects allowing mega-trucks in their country. On 10 October 2007, the German federal government decided, after trial projects in certain German states, not to allow mega-trucks in Germany. Following the increased interest, several studies were also launched looking into the issue in more detail¹².

It is clear that allowing mega-trucks would result in higher productivity and thus in better prices for those road hauliers who can afford incorporating such heavier and longer trucks in their fleet. In a short term perspective, two of these units would be able to transport the cargo of three conventional trucks. However, the studies also showed that in a medium term perspective, because of the cost and productivity advantage of mega-trucks, large quantities of freight would be shifted from rail to road. So, instead of offering benefits, mega-trucks would lead to more freight traffic on road than ever before.

Allowing mega-trucks would seriously affect all segments of rail freight (combined rail-road transport as well as conventional rail transport), as is clearly demonstrated by several studies, and could mean that as much as 55% of combined rail-road transport volumes would shift back to road. Furthermore, more road traffic, triggered by mega-trucks, would lead to an increase in CO₂ emissions, a decrease in road safety, and more congestion on the roads. There are also clear indications that road infrastructure is not capable of accommodating such long and heavy trucks, which means that large investments would be needed to adapt road infrastructure. In response, CER, together with the other rail associations – UIC, EIM, ERFA, UIRR and UNIFE – published a brochure on “Mega-trucks versus Rail Freight? What the admission of mega-trucks would really mean for Europe”.

The European Commission has also taken up the issue, launching a study in December 2007 to assess the consequences of a European-wide circulation of mega-trucks. The results are expected to be published in mid – 2008. CER will be following this study with great interest.

12. E.g.: “Competitive impact of the implementation of Gigaliners on Combined Transport in Europe”, TIM Consult for UIRR/ Kombiverkehr, September 2006; “Verkehrswirtschaftliche Auswirkungen von innovativen Nutzfahrzeugkonzepten”, K+P Transport Consultants, September 2006; “Longer, Heavier Road Vehicles Study by TRL/Heriot-Watt University - A response by English Welsh & Scottish Railway”, May 2007.



The publication “Mega-trucks versus Rail Freight? What the admission of mega-trucks would really mean for Europe” is available at www.cer.be or can be ordered from cer@cer.be.

DEVELOPMENTS REGARDING RAIL PASSENGER TRANSPORT

Third Railway Package

In the second half of 2007, the Third Railway Package was finally adopted after a very long legislative process lasting more than three years. The agreement between the Council and the European Parliament was informally reached in late June during the last possible phase under the co-decision procedure, namely the conciliation phase.

Negotiations were particularly fierce because of discussions involving the possible extension of the Passenger Rights Regulation's scope to include domestic transport services. The Council had been opposing this proposal right from the first reading. In contrast, negotiations on passenger liberalisation and the Directive on certification of train drivers seemed to be less problematic.

The Commission also supported opening up international passenger services by 1 January 2010 – including the possibility to serve more than one station in the same Member State (so called “cabotage”). The reason was that it seemed necessary to allow all market actors to gradually adjust to new market conditions.

It is important to bear in mind that, during the second reading, the European Parliament had already voted narrowly in favour of this balanced approach towards competition. No further negotiations were held on this issue.

One of the main concerns of the European legislators was that competition in international services could later have implications for the organisation and financing of rail passenger services provided under a public service contract.

The solution adopted grants Member States the possibility to limit the cabotage, in case it would compromise the economic equilibrium of a Public Service Contract. In addition, the text requests the Commission to present a report in 2012. This report will have to assess the development of the market, analyse the different models for organising this market and the impact of the Directive on public service contracts and their financing. The Commission shall, if appropriate, propose complementary measures to facilitate the opening up of the market.



In December 2007, CER published an essay by Yoshio Ishida, Vice-Chairman of JR East, on the success story of the Japanese railway system and JR East in particular. The privatization of JR East is an encouraging example of how to transform a heavily subsidised, loss-making company into a profitable modern service provider, which is the biggest rail passenger company in the world. The essay “The break-up and privatization of Japan National Railways and management reforms at JR East” is available at www.cer.be or can be ordered from cer@cer.be.



Unfortunately, the provision that allows Member States to impose a levy on railway companies that provide domestic and international passenger services to finance Public Service Contracts gives rise to some concern. This provision could hinder the healthy functioning of the competitive railway market which had just been opened.

Regarding the Passenger Rights Regulation, the final text approved by the European legislator was, by and large, influenced by the Council's position thanks to its increased negotiation power. Whilst the scope has been extended from international passenger traffic to domestic traffic, a series of exemptions may be granted by Member States. These would entail excluding urban, suburban and regional traffic, without any time limits, or the rest of domestic traffic for up to 15 years.

A preliminary examination of the new Regulation already suggests that it would not be easy for railway companies to deal with the increased legal complexity, whilst trying to simplify the rules for passengers, as set out in the philosophy of the Regulation.

More practical concerns raised during the negotiations were solved in a reasonable and well-balanced way in line with the requests of railway operators. These included the provisions on delay compensation, passengers with reduced mobility, designated areas in all trains for bicycles, and service quality standards.

Finally, the last piece of legislation within the Third Railway Package relates to the certification of train drivers operating locomotives and trains on the railway system in the EU. This text is in line with the agreement concluded between CER and the European Transport Workers' Federation (ETF) in January 2004. This agreement on a European driving licence for locomotive drivers in international services entailed the mutual recognition of health and competence requirements of drivers working on infrastructures abroad. It was the basis of the Directive which follows the main principles defended by CER since signing the agreement.

Regulation on Public Service Obligations

In parallel to the adoption of the Third Railway Package, the European Commission finally put an end to a seven year long battle over the revision of the Public Service Regulation. Discussions were eventually possible when the Commission decided to abandon the idea of using the Public Service Regulation as a tool for further opening up the passenger market to competition. It appears that the very politically sensitive field of public service transport cannot be opened up to competition today without a thorough appreciation of its political implications in the various Member States as it touches the heart of public welfare policy.

The revision of the Public Service Regulation was limited to simplifying the legal framework for the provision of public service transport.

Essentially, the text aims to secure that the relevant public authorities pay adequately for the services they require and receive. In other words, no over nor under compensation is allowed: railway companies must be paid for the services they deliver, as in any normal business relation. The compulsory conclusion of a contract between the public authority and the railway operator serves as a legal warrant for the appropriate compensation.

While the Regulation foresees awarding contracts following a competitive tendering process as a principle, there are some exemptions possible. These exemptions were introduced to ensure the full application of the subsidiarity principle, without which the Council would not have voted in favour of the text in the first place.

As a result, the relevant public authorities may decide to award their heavy rail transport contracts directly to the operator of their choice. The duration of such contracts will have to be shorter than those awarded following a competitive tendering procedure. The European institutions seem to have understood the commercial character of such contracts by stipulating that the price paid for the services required includes a “reasonable profit”.



FINANCING RAIL TRANSPORT



In the last few decades of the 20th century, investments in the inland transport sector in Western Europe have shown a steadily decreasing trend, resulting in inadequate and under-maintained transport infrastructure. However, recent figures show a turning point in this trend for Western Europe starting in 2001, with inland transport investments rising from 0.8% in 1998 to 1% of GDP in 2004. During this time, the rail sector in particular benefited from increased infrastructure spending, helping to contribute to the increased modal share which has been observed in recent years in the West!

Although the overall investment in inland transport infrastructure in Central and Eastern Europe increased from 1% of GDP in 2001 to 1.4% in 2004, financing of the rail sector has continued to deteriorate in this region. Scarcely available resources were allocated to the road sector in response to rapidly growing car ownership and congestion problems which triggered an overly focus on road investments. At the same time, an unequal treatment of road and rail modes in EU legislation created distortions in competitiveness in favour of road transport; the current Eurovignette discussion illustrates this well.

Within the framework of difficult transition processes from centrally led to market economies, Central and Eastern European (CEE) railways suffered even more. Irregular and inadequate maintenance budgets frequently allowed for not much more than 'stop-and-go' emergency repairs, and operations were characterised by cross-subsidisation, redirecting resources from viable freight operations to loss-making passenger operations.

Mindful of the challenges and confronted with growing transport impediments (e.g. congestion, pollution, safety) for sustainable economic growth, the European Commission embarked in 2001 on a new transport policy to address the modal imbalance and to define common principles for fair charging for the different modes of transport.

With the adoption of the Third Railway Package and the Public Service Obligation (PSO) Regulation, the European Commission has largely completed the legal framework for the envisaged railway reform, which it already started in the early 1990s when it was confronted with dwindling rail freight and passenger volumes in its Member States.

Despite rapid transposition of the new legal framework into national legislation, new Member States still find themselves facing a persistent, inadequate, and unreliable financial structure. Historic debts passed on from times of centrally led economies, continue to increase because of inadequate compensation for state imposed public service obligations. At the same time, insufficient state budgeting to cover the gap between revenues from rail user charges and maintenance costs contribute to these rising debts. The European Commission recently reported that infrastructure managers in certain Member States received no state transfers for infrastructure between 2003 and 2006. Revenues from user charges only cover about 30 to 50% of maintenance costs, with outliers between 10 and 100%.

Whereas most railway undertakings and infrastructure companies in CEE countries are not able to recoup their full costs from ticket sales revenues or user charges, transfers from Governments are needed to achieve the necessary financial stability. In preparation for inter- and intra-modal competition in an open market place, Central and Eastern European railways and infrastructure companies are pushing their governments to enter into multi-annual contracts for maintenance and compensation for public service obligations.



As demonstrated by experiences from some European countries, multi-annual contracts can enhance the transparency of mutual rights and obligations, while at the same time facilitating longer term planning of activities. However, railways are cautioned not to take multi-annual contracts as a foolproof guarantee for reliable financing: annual budget laws and/or fiscal limitations can still have a negative impact on longer term government financing. To mitigate this risk as much as possible, CER has requested the Commission to include careful monitoring of multi-annual maintenance and PSO contracts into the Rail Market Monitoring System (RMMS), and to take appropriate actions, such as exposure to peers, in case of non-compliance with multi-annual contracts or financing obligations. CER is cooperating closely with the Commission to develop the necessary parameters.

Apart from deficient infrastructure maintenance and under-compensation for public services, additional constraints for providing quality services are posed by a lack of new investments in infrastructure and the limited ability of operators to purchase new rolling stock. There are several instruments for financing new passenger rolling stock, for example by using Regional Funds or the inclusion of compensation packages in a PSO contract. Similarly, instruments are offered for financing new infrastructure – for example TEN-T or Cohesion Funds. However, it should be recalled that any public money provided to railway or infrastructure companies may constitute a so-called state aid.

Contrary to a commonly perceived fear, state aid is not necessarily bad for the economy. It is rather often considered essential to allow and facilitate the development of a region, of a certain type of industrial activity, of certain services, etc. provided it is granted following certain strict criteria in order not to affect competition on the market in an unacceptable manner.

The opening up of the rail sector to competition can only be fully achieved if and when Member States take up their responsibilities by adequately supporting railway undertakings and infrastructure companies operating on the market in order to put them on a competitive level playing field with other transport modes. This obviously implies important political and financial decisions, especially in the fields of debt cancellation, public service compensation, financing of rolling stock (especially in the New EU Member States where the average age of rolling stock is close to 30 years!) and financing of railway infrastructure.

In this context, Commission Vice President and Commissioner for transport, Jacques Barrot, announced the adoption of state aid guidelines aiming at clarifying the conditions under which public financial support to the rail sector would be considered favourably by the European Commission services. The Commission issued a set of draft guidelines which are still under consideration as this CER Annual Report went to press.

These guidelines will further facilitate the granting of adequate and well targeted public support to the revitalisation of the rail sector with the objective to support the creation of environmentally sustainable transport systems and the objective to create a level playing field for inter- and intra-modal competition.

PROGRESS ON SOCIAL DIALOGUE

Working conditions on international services: Revision of the 2004 CER-ETF Agreement

The Agreement on the working conditions of mobile staff in cross-border services, concluded between CER and the European Transport Workers' Federation in January 2004, was turned into Directive 2005/47/EC. Several revision dates were foreseen in the text, the main one coming two years after signing, i.e. February 2006, which was supposed to include a footnote to clause 4 (related to the rests away from home) and clause 11 (related to the evaluation of the whole agreement in the light of initial experience).

According to the Directive, in international services a day's rest away from home has to be followed by a day's rest at home. When necessary for transport needs, it offers the possibility of a second rest day away from home, if agreed by the social partners at national or company level. During discussions of the proposal in the Council, this clause received much attention. Some delegations expressed concerns about its adequacy, due to the length of some routes and the time needed to operate them. For this reason, the social partners have to evaluate the effects of this clause and revise the rule, if deemed necessary.

CER members have expressed similar concerns about the adequacy of this clause since the opening of the rail freight market. For many new routes, it is sometimes necessary to use the same drivers for longer distances. Some need more than two days of rest away from home.

Freight transport is particularly efficient on long distances and railway companies do not necessarily have relay stations for drivers located on all routes. Companies, particularly those taking advantage of the liberalisation of the European network, need flexibility as their business is developing. For many new routes, it is sometimes necessary to use the same drivers for longer distances. By limiting the rest to two days away from home, railway undertakings have a severe disadvantage compared to the freight haulage industry. It is also not compatible to the freedom of movement seen in other transport sectors across the European Economic Area.

The first appointment to discuss this issue with the social partners was planned for spring 2006. CER asked for more flexibility concerning the two-day maximum; by granting this request, it would be easier to develop new business across borders, thus exploiting the potential of the common EU rail freight market.

Over the past two years, CER tried to negotiate a change this rule with the ETF, offering what is believed to be adequate compensatory arrangements, but without any success. Transposing this particular rule into the national legislation of the Member States – without any change – will hinder the development of the recently opened rail freight market. However, CER continues to work towards finding an adequate solution.



Promoting the European Social Dialogue: Common CER-EIM-ETF recommendations on employability

The European Social Dialogue Committee for Railways conducted two studies on whether employability is a suitable and useful subject for the railway sector. The first study (2001–2002) resulted in a sector specific framework definition of the subject, while the second (2005–2006) examined the progress of implementing this subject in selected railway companies. The results of this last study led to the signing of common CER-EIM-ETF statement “Recommendations on the concept of employability in the railway sector”¹³ in December 2007.

Employability is a strategic subject based on prevention, aiming to create a working environment that maintains and improves the capacity of workers regarding qualifications, competences, health and fitness in order to be “employable” in general terms. The responsibility of ensuring employability is shared by the company, the employee, the work council and the trade unions.

The European Social Dialogue Committee for Railways intends to promote and facilitate the process of implementing and extending employability as a central theme of modern human resources policy.

13. See these recommendations on the CER website www.cer.be.



CUSTOMS AND SECURITY



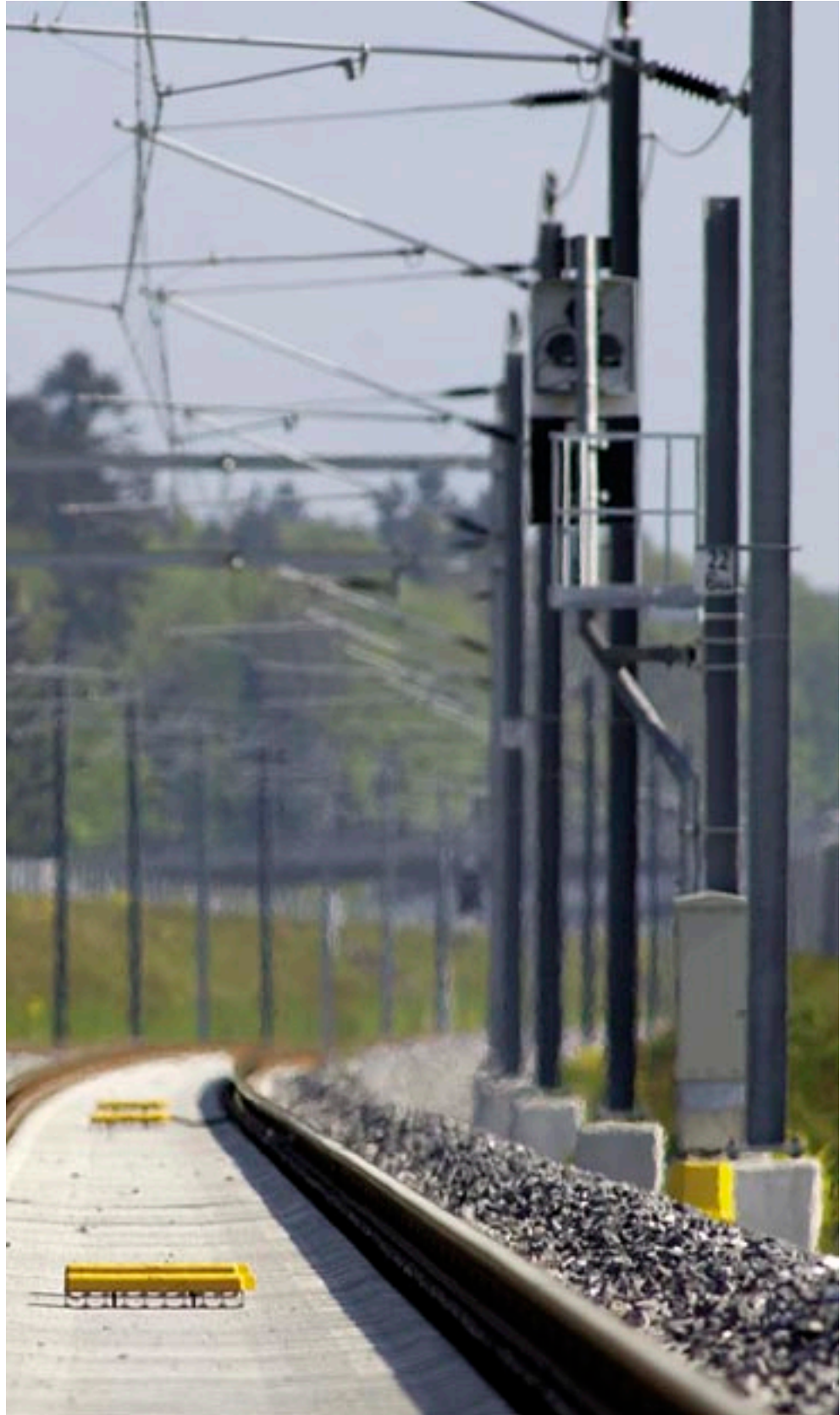
On 1 January 2008, provisions for the Authorised Economic Operator programme (AEO) entered into force. The AEO programme is part of a series of measures which were envisaged some years ago with the aim of improving security in customs. These security amendments to the Community Customs Code were adopted in Regulation 648/2005 of 13 April 2005. The follow-up to EC Regulation 648/2005 is the publication of the implementing provisions which set out the operational details in the customs processes for the above-mentioned measures.

The implementing provision, Regulation 1875/2006, entered into force on 26 December 2006 and sets out the following timeframe:

1. A common risk management framework was put in place in early 2007. The framework sets out uniform criteria for controls by customs authorities, targeting transports that have a higher security risk. The risk management system will be fully computerised by 2009.
2. The aim of the above-mentioned AEO programme is to strike a balance between increasing security requirements and facilitation for compliant traders. Member States can grant AEO status to any economic operator that meets common criteria relating to the operators' control systems, financial solvency and compliance record. Companies that are certified as AEO can benefit from trade facilitation measures in the field of customs and security.
3. On 1 July 2009, it will become mandatory for traders to provide customs authorities with advance information on goods brought into, or taken out of the customs territory of the European Union (for rail transport this would be two hours before crossing the EU border in electronic format or four hours in paper format).

These amendments to the existing customs legislation signify new obligations as well as new opportunities for the railway sector. It can require substantial investments in systems, particular for those railways which have not yet automated systems to meet customs obligations. To be able to fulfil these legal requirements, the European railways are starting to prepare themselves for a future with EDI (Electronic Data Interchange) based customs obligations. On the other hand, there are also benefits: transparency, more safety (creating "green lanes" which are very important and attractive for customers, and offer a basis for simplified procedures), more efficient declarations and a better connection with customers' data.

The CER Customs Group is currently working on ways to help railway companies meet these obligations, whilst also adapting optimally to the specificities of the rail sector. An important project of the CER Customs Group is NCTS-Rail (New Computerised Transit System) which aims at adapting the existing NCTS to the specific needs of rail transport. The e-RailFreight project, a joint initiative of several railway organisations (UIC, CIT, CER, RAILDATA), aims to move towards the exclusive use of electronic data records for international freight shipments in the whole COTIF zone in the longer term, replacing the current paper documentation (consignment note and accompanying documents).



FURTHER PROGRESS ON INTEROPERABILITY LEGISLATION

For many years, CER has worked relentlessly to simplify rolling stock cross-acceptance procedures. The current requirement that a locomotive has to be submitted to an authorisation procedure in every Member State – regardless of previous approvals in other Member States – is a huge practical obstacle for cross-border operation. It delays the entry into new markets for years and costs operators millions of euros, without adding any benefits.

In 2005, a CER/UNIFE letter was sent to Mr Barrot requesting him to apply a pragmatic approach for authorising vehicles in another Member State. CER was pleased with the Commission's proposal to revise the Railway Interoperability and Safety Directive presented by the Commission in December 2006. CER immediately reacted by submitting a set of amendments to the proposals, supported by a joint CER-UNIFE-EIM letter in March 2007.

The German EU Presidency (in the first half 2007) was determined to facilitate rolling stock acceptance in other Member States and progressed significantly. The Transport Council debate (June 2007) on a progress report dealing with negotiations for the revision of the Rail Interoperability Directive then confirmed the Member State representatives' understanding of the importance of rolling stock cross-acceptance for the railway operators in Europe and the competitiveness of the whole sector.

Both the Council and the European Parliament agreed to streamline the different legal texts dealing with rolling stock. Whilst rolling stock is dealt with in the Interoperability Directive and in the Safety Directive, the revised texts consolidate provisions concerning rolling stock in the Interoperability Directive.

The new Interoperability Directive will also replace the previously separate Directives on interoperability for the conventional and the high speed rail systems. Applying the revised Directive, bureaucracy should be significantly reduced with a clear impact on the dynamic of the market.

CER, together with UNIFE, reacted to the legislative proposals by suggesting that several adjustments be added and elaborating a voting recommendation in September 2007. During the process, Members of the European Parliament were contacted and briefed of the rail sector's position.

The report on the revision of the Interoperability Directive was finally adopted by the European Parliament plenary in Strasbourg on 11 December 2007. The revised Directive is a major step towards a truly European market without barriers. Railway operators will now save a lot of time and money when they prepare services in new markets with rolling stock which was already authorised in one of the EU Member States. The revised Directive underpins the principle of mutual recognition and the technical harmonisation of railway stock as well as setting clear time limits and criteria for granting an authorisation.

CER appreciates the acceptance of sector proposals for provisions related to vehicles types and the request for a reference document that classifies all national rules. As the European Parliament and Council agree fully on the matter, it is expected that the revised Interoperability Directive will be adopted by the Council in April 2008.

The revised Interoperability Directive is a remarkable success of all involved parties, including the sector organisations. It is a great example of swift, highly efficient cooperation as illustrated by the fact that the legislative procedure took only a year, despite its complexity.

CHRONOLOGY: POLITICAL EVENTS 2007/2008

2007

25 April	The European Parliament sets up a temporary Committee on Climate Change, in order to raise awareness for climate change by putting this issue high on the international agenda. The Committee mandate is for 12 months, but will be probably extended in May 2008.
9 May	The European Union celebrates the 57th Europe Day and its 50th anniversary: many events in the 27 Member States commemorate the Treaty of Rome, signed in 1957.
10 May	The European Parliament adopts the Public Service Regulation after seven years of difficult discussions between the European institutions. The revised Regulation concerns public passenger transport services by road and rail.
23 May	The European Parliament approves the Regulation setting out the general rules for granting funding to the Trans-European Transport Networks (TEN-T) and the Trans-European Energy Network (TEN-E).
6 June	The Transport Council adopts conclusions concerning a European energy strategy for transport, where it underlines the need for the transport sector to actively contribute to the achievement of the EU environmental targets.
8 June	The Transport Council agrees on the inclusion of aviation in the European Emissions Trading Scheme (ETS).
8 June	EU Transport Ministers accept the extension of the major trans-European transport axes to the neighbouring countries.
10 June	The European Commission launches a public consultation on “Rail noise abatement measures addressing the existing fleet”.
19 June	After more than three years of discussions, EU institutions finally agree on all three texts of the Third Railway Package.
1 July	Portugal takes over the Presidency of the Council of the European Union.
10 July	The European Parliament supports a soft approach on European critical infrastructure. The resolution voted in Strasbourg restricts the scope concerning the identification and the designation proposed by the Commission.
12 July	The European Parliament identifies environmental concerns as one of the major challenges for European transport policy. In the Report on the Mid-term Review of the White Book, the Parliament in particular called for the ambitious goal in terms of CO ₂ emission cuts by 20% in 2020 in the transport sector.
5 September	The Parliament approves a Report on Freight Logistics, requesting that the decision on mega-trucks be left to Member States on domestic routes, subject to approval by the Commission.
10 September	The six TEN-T Coordinators sent their second activity reports to the European Commission. The reports constitute an inventory of each of the six projects concerned.

CHRONOLOGY: POLITICAL EVENTS 2007/2008

22 September	Conclusion of the sixth European Mobility Week: 1300 European cities participate in the promotion of sustainable and smart travelling.
25-26 September	The three components of the Third Railway Package (the Directives on the liberalisation of international passenger services and on the certification of train crews, and the Regulation on passengers' rights) is finally approved by the European Parliament and the Council of the European Union.
25 September	The Commission publishes the Green Paper "Towards a new culture for urban mobility" after a broad consultation with stakeholders.
10 October	The transport ministers of the German Länder decide to reject the circulation of mega-trucks in Germany. Not only 60t trucks were rejected, but also the "light" version of 25.25m and 40t.
10 October	The Commission adopts a Communication setting out its vision for an integrated maritime policy for the EU.
18 October	The EU heads of state and government agree on the "Lisbon Treaty" to reform the EU's institutional architecture.
18 October	The European Commission adopts its "freight transport agenda", a series of initiatives aimed at improving the freight market in Europe. The new package contains proposals concerning logistics, a rail network giving priority to freight, and European ports, as well as two documents on maritime transport.
18 October	The European Commission publishes a Communication on Rail Market Development and its Monitoring. The Communication provides an interesting overview of the rail market.
24 October	The European Commission publishes the results of its first review of the renewed Sustainable Development Strategy. The review states that action to turn around persistent unsustainable trends must be significantly stepped up.
25 October	French government presents its "green revolution". Among the proposed measures: freezing the construction of new roads, and doubling the TGV network.
30 October	The Commission opens a public consultation on the internalisation of external costs, related to its obligation to present a comprehensive model for future calculations of infrastructure charges no later than 10 June 2008.
13 November	The European Parliament approves in first reading the Directive that includes airlines in the EU carbon emission trading system.
20 November	The European Commission completes the project selection process for the TEN-T multi-annual programme 2007-2013.
29 November	The Transport Ministers of the European Union adopt their conclusions on the European Commission's Freight Logistics Action Plan, supporting the Action Plan. Ministers also stress the importance of EU legislation to limit CO ₂ emissions from cars.
11 December	The Vice-President of the European Commission in charge of Transport Jacques Barrot, announces in front of the European Parliament a legislative revision of the Eurovignette Directive in June 2008, to allow the internalisation of external costs.

CHRONOLOGY: POLITICAL EVENTS 2007/2008

11 December	The European Parliament approves a Decision on paperless environment for customs and trade, which should enable to lodge electronically all the information required by customs legislation.
11 December	The European Parliament votes on the Report on the revision of the European Railway Interoperability Directive. The new Directive will replace the previously separate Directives on Interoperability in the conventional and in the high speed rail system and will facilitate the mutual recognition of rolling stock in EU Member States.
13 December	The heads of state and government of the 27 Member States of the European Union sign the new Treaty of the EU, the so-called "Lisbon Treaty".
20 December	The European Commission publishes the long awaited draft guidelines on state aid for railway companies.
20 December	The European Environment Ministers decided unanimously to include civil aviation in the EU's carbon emission trading scheme (ETS).
21 December	The Commission puts forward a proposal to reduce emissions from trucks and busses of nitrogen oxides by 80% and particulate matter by 66% compared to the Euro V stage.

2008

1 January	Slovenia takes over the Presidency of the European Union. It is the first Presidency of one of the 12 recent new Member States.
15 January	The European Commission publishes the first deliverable of the IMPACT study, the handbook on estimation of external costs in the transport sector.
15 January	The European Parliament adopts the European Commission's proposal to remove unnecessary burdens for transport companies. Freight carriers will no longer have to carry separate transport documents.
23 January	The European Commission publishes its long-awaited climate package, consisting in four legislative proposals aiming at reaching the EU's targets for reducing greenhouse gas emissions and enhancing energy efficiency.
31 January	A stakeholders' conference on the internalisation of external costs is organised by the European Commission. CER participates.
6 February	The Commission publishes its Communication on Multi-annual Contracts for rail infrastructure quality.
19 February	The European Parliament approves the Council Common Position of the Modernised Customs Code.
5 March	The European Commission adopts a package of measures aimed at improving transport connections between the EU and its neighbours.
11 March	The European Parliament adopts a comprehensive report on sustainable transport.
12 March	50 years anniversary celebration of the EU.
13-14 March	The European Council discusses the Climate Package during its spring summit.



CONFERENCE “FIGHTING CLIMATE CHANGE – THE POTENTIAL OF RAIL TRANSPORT”



The EU’s target of reducing greenhouse gas emissions by 20% by 2020 is only realistic if the emissions from the transport sector are drastically reduced. This emerged as the main message during the “Fighting climate change – The potential of rail transport” conference on 26 June 2007 in Brussels. More than 150 stakeholders from the transport sector and high-level politicians gathered to discuss the contribution the railways can make to the environment policy.

In his opening address, Jacques Barrot, Vice-President of the European Commission and Commissioner for Transport made clear that the development of more energy efficient technologies and use of “greener” energy sources in the road sector, together with the better use of existing transport capacities, will not be sufficient to tackle the problem of transport growth and its environmental impact. He emphasised that “We need to give priority to the most efficient and cleanest transport modes, and rail transport certainly has an excellent record on energy consumption and emissions.”

The panellists agreed that one way to bring about a modal shift is internalising external costs such as pollution in transport user’s charges. Wolfgang Tiefensee, the German Federal Minister of Transport, Building and Urban Affairs and then Head of the Council of the EU for Transport used the example of Germany. “In my country, the introduction of road tolls in 2005 clearly improved the capacity usage of trucks. In the same period, the volumes of goods transported by rail have significantly increased,” he said. He also emphasised that rail transport can only satisfy the growing transport needs of European citizens, if there is sufficient infrastructure investment available. Road tolls should be used for these investments.

Jannie Haek, CEO of SNCB Holding and CER Management Committee member, who chaired the conference, congratulated the rail sector on this joint conference. He pointed out that, in the past, the railways did not communicate sufficiently their outstanding performance in terms of environment.

The conference was part of CER’s efforts to raise the awareness for the rail transport’s contribution to the climate change challenge. With the same ambition, this year’s CER book is dedicated to rail transport and the environment. As all stakeholders in the rail sector share the responsibility to draw attention to their environmental credentials, CER organised the conference together with the European Infrastructure Managers (EIM), the International Union of Railways (UIC), the International Association of Public Transport (UITP) and the Association of European Railway Industries (UNIFE).



*Jacques Barrot,
Jannie Haek and
Wolfgang Tiefensee
at the CER environment
conference at
Concert Noble.*

FIRST EUROPEAN RAILWAY AWARD



Jean Dupuy receives the European Railway Award from Anne-Marie Idrac and André Navarri.

In 2007, CER in cooperation with UNIFE, launched an initiative to draw attention to personal achievements in promoting European rail transport. By introducing the “European Railway Awards”, the sector recognises that technical and political progress in developing an integrated European railway area require individuals with vision and determination to realise this.

At the first awards ceremony, that took place on 17 October 2007 in Brussels, Europe’s railway sector paid tribute to the achievements of two of Europe’s finest contributors to modern-day railway transport development. Two awards were presented: one for technical achievements in European railways, and the other for political vision and progress in the legal framework. The award for technical achievements was given to former SNCF Director General Jean Dupuy, who was responsible for the development and rollout of the first French TGV. The second award was given to the former EU Commissioner for Transport, Karel Van Miert, who is best known for laying down the foundations of an integrated European railway market.

In handing the award to Karel Van Miert, European Commission Vice-President, Jacques Barrot, underlined the importance of the recommendations for priority projects of the Van Miert group in 2003 which led to the current EU policy on sustainable transport. “Public bodies need to meet their responsibilities, and with the support of the European corridor coordinators have to engage in those projects which are crucial for sustainable development in Europe,” Mr Barrot said. He congratulated Mr Van Miert on his undiminished perseverance in supporting the important European Berlin – Palermo axis and the Brenner tunnel in his capacity as EU corridor coordinator.

Anne-Marie Idrac, member of the CER Management Committee and President of SNCF praised Jean Dupuy for personifying the high speed train TGV. “All through the development phase and in your different positions in SNCF, you managed the high speed train project with the utmost precision, persistence and will,” she said. “In the mid-1960s, at a time when priority was given to road and air transport projects, you succeeded in convincing people that there was room to develop passenger rail transport.”

Aad Veenman, CER Chairman concluded by underlining the role of the European Commission in putting rail high on the EU’s political and economic agenda. He concluded: “The modern world, and even the railway world, is made by man. People, both good engineers, good politicians but certainly also good train drivers, conductors, maintenance staff, station service staff, and so many more, are making the railways what they are.”



Dr. János Berényi Chairman and CEO of Hungrail at the Joint Hungarian members meeting on 21 May



Henri Kuitunen, VR, signing the resolution on 1520 gauge on 30 May



Hartmut Mehdorn, CEO of DB, welcoming the participants of the High Level Passenger meeting on 8 June in Frankfurt



Paolo Costa, TRAN Committee Chairman, Matthias Ruete, DG TREN Director General and Michael Robson, EIM Secretary General at the CER conference "Fighting climate change" on 26 June



German Transport Minister Wolfgang Tiefensee visiting the railway exhibition stands at the climate change conference on 26 June

CHRONOLOGY OF CER ACTIVITIES

21 May	High-Level meeting with Hungarian CER members (Hungrail, GySEV, MAV, MAV Cargo, VPE, CER) in Budapest.
22 May	CER organises a workshop in Brussels on "Rail contribution to the strategy for sustainable European transport and energy policy".
23 May	CER participates in a European Commission workshop on rail noise abatement measures addressing the existing rolling stock fleets.
29 May	CER takes part in the negotiation meeting of the Rail Transport Sectoral Social Dialogue Committee.
30 May	Baltic CEO's sign a common resolution on the interoperability considerations relating to the conformity requirement of rolling stock subsystem with the standards of the Commonwealth of Independent States (CIS).
31 May	The CER Human Resources Directors Group meets in Vienna.
4 June	CER participates in the European Commission stakeholder conference on the Green Paper on urban transport: "Towards a European policy for urban transport".
7 June	CER takes part in ERA ERTMS conference 2007.
7 June	The CER Management Committee meets for its 44th meeting in Paris.
8 June	CER and UIC organise the third High Level Passenger Meeting hosted by Deutsche Bahn in Frankfurt/Main.
9 June	Johannes Ludewig, CER Executive Director, represents CER at the official opening of the first cross-border ICE train from Frankfurt to Strasbourg.
12 June	CER participates in the final conference of the joint European project on "Recommendations for a better representation and integration of women in the railway sector".



CER/UIC High Level Passenger Meeting on 8 June in Frankfurt

CHRONOLOGY OF CER ACTIVITIES



ERRAC Chairman Åke Wennberg (right) handing over the SRRA II to Andras Siegler from DG Research on 27 June



CER member's Directors of International Affairs visit the Lötschberg tunnel on 29 June



Bulgarian Minister of Transport Mutafchiev, Ministry of Finance officials and the CEOs of NRIC and BDZ, Ginev and Petkov at the seminar with TEBODIN on 5 July in Sofia



From left to right: Jean-Paul Preumont, Johannes Ludewig, Sabine Trier (ETF Deputy Secretary General), Didier Le Reste (CGT Secretary General; France) and Guy Greivelding (Head of the ETF Negotiation Team; Luxembourg) at the ETF meeting on 10 July



CER Management Committee representatives meet with Jacques Barrot on 17 July. From left to right: Johannes Ludewig, Mauro Moretti, Jacques Barrot, Aad Veenman, Anne-Marie Idrac, Antoine Hurel and Jan Komárek



Panellists (from left to right): Olaf Krüger, Tamás Kozák, Nicolas Perrin, moderator Michael Cordes, Ferdinand Schmidt, Friedrich Smaxwil, Graham Smith, Friedrich Smaxwil, Christoph Wolff and Johannes Ludewig at the CER forum at transport logistic 2007 in Munich on 12 June

12 June	At the opening of the Transport Logistic 2007 fair in Munich CER organises a panel discussion on “The Full Opening of the European Rail Freight Market: First Assessment after Six Months in the light of the current climate change debate”.
15 June	Johannes Ludewig, CER Executive Director, is invited to the official opening of the Lötschberg base tunnel in Switzerland.
16 June	Johannes Ludewig representing CER assists at the official opening ceremony of the Betuwe route in the Netherlands.
18 June	CER participates in the UIC Executive Board and UIC General Assembly in Moscow.
26 June	CER organises the conference “Fighting climate change – the potential for rail transport” in Brussels.
27 June	The European Rail Research Advisory Council (ERRAC), representing the major stakeholders of rail research in Europe, including CER launches its updated strategic agenda 2020.
28 June	CER meeting of International Affairs Directors, Berne.
5 July	CER takes part in a seminar on options for enhancing the financial stability of Bulgarian Railways, organised in cooperation with the Bulgarian Ministries of Transport and Finance.
9 July	CER participates in a stakeholders meeting on developments in service quality of rail freight transport, organised by the European Commission.
10 July	CER meets ETF representatives on the future of negotiations on working conditions.
13 July	An agreement between CER and CENELEC on cooperation in the field of standardization of electrotechnica is signed.
17 July	Members of the CER Management Committee meet Vice-President of the European Commission Jacques Barrot in Brussels.
25 July	CER Executive Director Johannes Ludewig and Hana Rihovsky visit the Albanian railways HSH in Durres.
26 July	A first Freight Customers/Railways meeting takes place in Brussels.

CHRONOLOGY OF CER ACTIVITIES



Johannes Ludewig meets with HSH Director General Zamir Ramadanani on 25 July



Johannes Ludewig meets with Richard Fearn, IE Chief Executive (right) and Tom Finn, IE Manager Strategic Planning on 21 August



Supervisory board of Finnish VR visits CER office on 3 September



CER General Assembly in the Nicolae Iorga Hall in the Bucharest Parliament's Palace on 28 September



Romanian Transport Minister Ludovic Orban addressing the CER General Assembly on 28 September



Johannes Ludewig, Liudmila Zumerienė, Jurgita Skritaitė, Minister Algirdas Butkevičius, Arenijus Jackus, State Secretary Alminas Mačiulis at the Rail Baltica Conference on 4 October

21 August	CER Executive Director Johannes Ludewig visits CER Irish member company CIE.
3 September	The Finish railways VR Supervisory Board visits the CER office.
4 September	CER meets with Director General of DG TREN Matthias Ruete.
5 September	Johannes Ludewig, CER Executive Director, meets with the Director for Inland Transport Enrico Grillo Pasquarelli and Head of Unit for Rail Transport Maurizio Castelletti of the European Commission.
11 September	The 4th CER-UIC High level Freight meeting takes place in Brussels. At this occasion, the results of the CER Corridor Business Case Analysis are official presented to the European Commission and press.
17 September	CER Executive Director Johannes Ludewig meets with French Transport Secretary of State Dominique Bussereau.
20-21 September	Represented by Denise Kwantes, CER takes part in the COLPOFER conference organised in Lucerne.
21 September	CER takes part in the UIP congress organised in Cannes.
27 September	The 45th CER Management Committee takes place in Bucharest.
28 September	The 31st CER General Assembly takes place in Bucharest, and is opened by an introductory speech of the Romanian Transport Minister Orban.
4 October	Johannes Ludewig, CER Executive Director, chairs the second session of the Rail Baltica Conference in Vilnius.
9 October	CER Executive Director Johannes Ludewig is one of the speakers during a public hearing on "Sustainable European Transport Policy" organised by the Committee on Transport and Tourism of the European Parliament.
10 October	A meeting of the Working Party "Adaptability – Interoperability" of the European Social Dialogue Committee for Railways took place in Brussels on 11 October with representatives of ETF and CER.
10 October	CER presents European transport policy issues at the main seminar of the Elmia Nordic Rail fair in Jönköping, Sweden.
15-18 October	During the CEE Rail 2007 conference in Budapest, CER participated in the sessions which were focusing on the development of passenger services, rolling stock requirements, infrastructure development, marketing and finance and investment.
16 October	The CER Management Committee and the UNIFE Presiding Board meet for the first joint meeting in Brussels.
17 October	The CER Management Committee meets in Brussels.
17 October	Former SNCF Director Jean Dupuy and former EU Commissioner Karel Van Miert receive the first European Railway awards, presented by CER and UNIFE. The ceremony takes place in Brussels, in the presence of Vice-President of the European Commission Jacques Barrot.
23 October	The 16th liaison meeting with rail customer organisations takes place in Brussels.
6 November	The second Freight Customers/Railways meeting takes place in Brussels.
12 November	CER speaks at the informal transport ministers meeting at the occasion of the opening of the Railtec fair in Dortmund.

CHRONOLOGY OF CER ACTIVITIES



André Navarri and Aad Veenman at the first joint CER / UNIFE Board meeting on 16 October



Jacques Barrot handing over the European Railway Award to Karel Van Miert on 17 October



Informal European high level meeting of transport ministers at the Railtec 2007 fair in Dortmund, on 12-15 November



Visit of a JR East delegation to CER on 4 December.

From left to right: Naaya Koide, UITP Manager detached by JR East, Kazuhiko Aida, Manager of International Department, Johannes Ludewig, Yoshio Ishida, Vice-chairman JR East, Teruo Morita, Director of Paris Office and Yoko Kashiwabara (translator)



Participants at the CER CEEC Infrastructure CEO meeting on 6 December.

From the left: Konstantinos Tzanakakis, Vassilios Makantassis, Tomasz Lachowicz, Zbigniew Szafranski, Tadeusz Kaczmarek, Mirjam Kastelic, Peter Schara and Dalibor Zelený

16 November	The International Affairs Directors of CER members meet in Vilnius.
22 November	CER takes part in the RailNetEurope business conference in Vienna.
23 November	CER Executive Director Johannes Ludewig and Hana Rihovsky visit the State Secretary for Transport Peter Verlič in Slovenia.
27 November	The Bulgarian Minister of Transport meets CER in Brussels.
30 November	CER takes part in the meeting of the Working Group Rail Market Monitoring in the framework of the Developing European Railways Committee.
3 December	The first parliamentary symposium on “Promoting a sustainable transport policy” takes place in the European Parliament in Brussels, with CER as one of the panellists.
4 December	CER participates in the third annual meeting of Ministers on the development of the South East Europe core regional transport network, taking place in Tirana.
4 December	A delegation of JR East railway company from Japan visits the CER office in Brussels.
5 December	A meeting of the Steering Committee “Railways Sectoral Dialogue Committee” takes place, in which CER participates.
6 December	Several meetings take place in Paris, including a special meeting of the infrastructure CEOs of Central and Eastern European countries, the CER Management Committee and CER General Assembly.
7 December	CER participates in the UIC European Management Committee and UIC Regional Assembly for Europe taking place in Paris.



From left to right: Johannes Ludewig, Marie-Hélène Colle, Karel Van Miert, Tony Van Den Berghen and Niall Doheny (UNIFE) holding the Railway Award Prize on 7 December

2008



Louise Shaw, Roger Cobbe and Peter Dudáš at the CER General Assembly on 6 December in Paris



Johannes Ludewig meets with Polish State Secretary Juliusz Engelhardt on 16 January in Warsaw



Johannes Ludewig meets with Slovenian Transport Minister Radovan Žerjav and his staff at CER on 24 January



Central Eastern European railway CEOs meet with Transport Commissioner Jacques Barrot and Director General Matthias Ruete on 26 February



Jacques Barrot addressing the CEEC CEOs (on his left: Matthias Ruete) on 26 February

15 January	The Directors of International Affairs of CER member companies meet in Brussels for a special meeting on Eurovignette.
16 January	Johannes Ludewig, CER Executive Officer, and Hana Rihovsky visit Juliusz Engelhardt, the newly appointed Undersecretary of State for the Rail Sector in the Polish Ministry of Infrastructure.
23 January	The New Opera research project has its 4th stakeholders' conference in Brussels. CER is moderator of one of the panels.
24 January	CER participates in the International Transport Forum stakeholder information & consultation day on energy and greenhouse gas emission strategies in the transport sector.
24 January	Slovenian Transport Minister Radovan Žerjav and other representatives of the Slovenian ministry of transport visit the CER offices in Brussels.
25 January	CER participates in a stakeholders' consultation on state aid guidelines to railway undertakings, organised by the European Commission.
30 January	A meeting between CEOs of railway undertakings from South-Eastern Europe and Matthias Ruete, Director-General of DG TREN at the European Commission, takes place in Brussels.
31 January	The Commission organises a stakeholders' conference on the internalisation of external costs in Brussels. It was attended by the Commissioner for Transport Jacques Barrot and the Director General for Energy and Transport Matthias Ruete and CER participates.
1 February	CER meets with Laurens-Jan Brinkhorst, European coordinator of priority corridor 6 "Lyon-Turin-Milan-Venice-Trieste/Koper-Ljubljana-Budapest".
1 February	CER, EIM and UIC organise a workshop on targets for CO ₂ reduction in rail transport.
13-15 February	CER attends the International Regional Railways Business Forum "Strategic Partnership 1520: the Baltic Region" in Riga.
14 February	CER attends a public hearing on "Urban mobility – one size fits all?" organised in the European Parliament.
15 February	The European Commission organises a workshop on the RAILCALC project on rail infrastructure charges.
20 February	The CER Management Committee and UIC European Management Committee take place in Paris.
21 February	The Strategic Group on a "European Rail Freight Network" meets for the first time in Brussels.
22 February	CER meets with the cabinet of Stavros Dimas, EU Commissioner for Environment.
22 February	The Australian railway association visits the CER offices.
26 February	High-level CEO from Central and Eastern European countries meet in Brussels, and discuss with Transport Commissioner Jacques Barrot and Director-General Matthias Ruete.



Brett Hughes from the Australian railway association on 22 February at the CER office



Dinner at the high level conference on the Third Railway Package on 5 March in the Kolekcji Jana Pawla II Museum in Warsaw



The Directors of International Affairs say farewell to their colleagues Lennard Sparring, Walter Moser, Pal Bakos and Maria Wardal



The CER delegation visiting JR East visiting a Shinkansen maintenance workshop (in the middle: JR East Vice-Chairman Yoshio Ishida)



Johannes Ludewig meets with JR East Chairman Mutsutake Otsuka on 3 April

26/27 February	The 5th CER/UIC High Level Freight meeting brings together freight CEOs of CER and UIC member companies in Brussels.
4 March	A stakeholders' meeting on mega-trucks takes place in Brussels with CER as one of the speakers.
6 March	CER organises, together with Polish railways PKP and the Polish Ministry of Transport, a high level conference in preparing for the implementation of the Third Railway Package and the Public Service Regulation in the Polish Parliament building in Warsaw.
7 March	The Directors of International Affairs of CER members meet in Warsaw.
11 March	A TAF TSI Stakeholder day is organised in Paris. CER participates.
11-12 March	The European Commission organises workshops on Urban Mobility, with CER among the participants.
13-14 March	CER attends the European Commission Focal point meetings on Administrative and Operational bottlenecks.
15 March	A representative of CER attends the European Passenger Forum Conference in London.
17-19 March	CER Chairman Aad Veenman and Executive Director Johannes Ludewig participate in the 6th World Congress on High Speed Rail in Amsterdam.
2-3 April	A delegation of CER visits JR East railway company in Japan.
3 April	A representative of CER attends the ASTOC General Assembly in Stockholm.
3-4 April	CER participates at the COLPOFER Conference, taking place in Berlin.
























MEP Boguslaw Liberadzki speaking at the high level conference on the Third Railway Package on 6 May in Warsaw. In the background: Peter Faross, Johannes Ludewig, Juliusz Engelhardt, Andrzej Wach

MEMBER RAILWAY AND INFRASTRUCTURE COMPANIES

COUNTRY	Logo	NAME	ENGLISH NAME	ABBREVIATION	WEBSITE
Albania		Hekurudha Shqiptare	Albanian Railways	HSH	www.hsh.com.al
Austria		Österreichische Bundesbahnen	Austrian Federal Railways	ÖBB	www.oebb.at
Austria		Salzburger Lokalbahn	Salzburg Regional Railway	SLB	www.slb.at
Austria		Wiener Lokalbahnen Cargo	WLB Cargo	WLC	www.wlb.at/ cargo-home.html
Belgium		SNCB/NMBS Holding	Belgian National Railways Holding	SNCB/NMBS Holding	www.b-rail.be
Belgium		Société Nationale des Chemins de Fer Belges / Nationale Maatschappij der Belgische Spoorwegen	Belgian National Railways	SNCB/NMBS	www.b-rail.be
Belgium/France		Thalys International	Thalys International	Thalys	www.thalys.com
Bosnia-Herzegovina		Željeznice Federacije Bosne i Hercegovine	Railways of the Federation of Bosnia-Herzegovina	ŽFBH	www.zfbh.ba
Bosnia-Herzegovina		Željeznice Republike Srpske	Railways of the Republic of Srpska	ŽRS	www.zrs-rs.com
Bulgaria		Balgarski Daržavni Železnitsi	Bulgarian State Railways	BDŽ	www.bdz.bg
Bulgaria		Bulgarian Railway Company	Bulgarian Railway Company	BRC	
Bulgaria		Nacionalna Kompania Železopatna Infrastruktura	Bulgarian National Railway Infrastructure Company	NRIC	www.rail-infra.bg
Croatia		Hrvatske Željeznice	Croatian Railway Company	HŽ	www.hznet.hr
Czech Republic		České Dráhy	Czech Railways	ČD	www.ceskedrahy.cz
Czech Republic		Správa Železniční Dopravní Cesty	Czech Railway Infrastructure Administration	SŽDC	www.szdc.cz
Denmark		Danske Statsbaner	Danish State Railways	DSB	www.dsb.dk
Denmark		Railion Scandinavia	Railion Scandinavia	Railion Scan	www.railion.dk
Estonia		Eesti Raudtee	Estonian Railways	EVR	www.evr.ee
Finland		VR-Yhtymä Oy	VR-Group – Finnish Railways	VR	www.vr.fi
France		Société Nationale des Chemins de Fer Français	French National Railway Company	SNCF	www.sncf.fr
France		Veolia Transport	Veolia Transport	Veolia Transport	www.veolia-transport.com







MEMBER RAILWAY AND INFRASTRUCTURE COMPANIES

COUNTRY	Logo	NAME	ENGLISH NAME	ABBREVIATION	WEBSITE
Georgia		Saqartvelos Rkinigza	Georgian Railway	GR*	www.railway.ge
Germany		Deutsche Bahn	German Railway Group	DB	www.bahn.de
Germany		TX Logistik	TX Logistik	TX Logistik	www.txlogistik.de
Great Britain		Association of Train Operating Companies	Association of Train Operating Companies	ATOC	www.atoc.org
Great Britain		English, Welsh and Scottish Railways	English, Welsh and Scottish Railways	EWS	www.ews-railway.co.uk
Great Britain		Eurostar (UK)	Eurostar (UK)	Eurostar	www.eurostar.com
Greece		Organismos Siderodromôn Elladas	Hellenic Railways Organisation	OSE	www.ose.gr
Hungary		Central-European Railway	CER Central-European Railway Transport, Trading and Service Company	CER	
Hungary/Austria		Győr-Sopron-Ebenfurth Vasút / Raab-Oedenburg-Ebenfurter Eisenbahn	Győr-Sopron-Ebenfurth Railway Company	GySEV/RoeEE	www.gysev.hu
Hungary		Magyar Vasúti Fuvarozói Egyesülés	Hungarian Railway Association	HUNGRAIL	www.hungrail.hu
Hungary		Magyar Államvasutak	Hungarian State Railways	MÁV	www.mav.hu
Hungary		Magyar Államvasutak Cargo	MÁV CARGO – Hungarian Rail Freight Company	MÁV Cargo	www.mavcargo.hu
Hungary		MÁV-START	MÁV-START – Hungarian Rail Passenger Company	MÁV-Start	www.mav-start.hu
Hungary		Vasúti Pályakapacitás-Elosztó	Hungarian Railway Capacity Allocator	VPE	www.vpe.hu
Ireland		Iarnród Éireann	Irishrail	IÉ	www.irishrail.ie
Italy		Ferrovie dello Stato	Italian Railway Group	FS	www.ferroviedellostato.it
Latvia		Baltijas Ekspresis	Baltic Rail Freight Company	BE	www.asbe.lv
Latvia		Latvijas Dzelzceļš	Latvian Railways	LDZ	www.ldz.lv
Lithuania		Lietuvos Geležinkeliai	Lithuanian Railways	LG	www.litrail.lt
Luxembourg		Luxembourg Cargo	Luxembourg Cargo Company	CFL Cargo	www.cflcargo.eu
Luxembourg		Société Nationale des Chemins de Fer Luxembourgeois	Luxembourg National Railway Company	CFL	www.cfl.lu

* Associated member.

COUNTRY	Logo	NAME	ENGLISH NAME	ABBREVIATION	WEBSITE
Macedonia		Makedonski Železnici Infrastruktura	Railways of the Former Yugoslav Republic of Macedonia Infrastructure	RFYMI	www.mz.com.mk
Macedonia		Makedonski Železnici Transport	Railways of the Former Yugoslav Republic of Macedonia Transport	RFYMT	www.mz.com.mk
Montenegro		Železnice Crne Gore	Railways of Montenegro	ŽCG	www.zeljeznica.cg.yu
Netherlands		Nederlandse Spoorwegen	Dutch Railways	NS	www.ns.nl
Netherlands		Railion Nederland	Railion Netherlands	Railion NL	www.railion.nl
Norway		Norges Statsbaner	Norwegian State Railways	NSB	www.nsb.no
Poland		CTL Logistics	CTL Logistics	CTL	www.ctl.pl
Poland		Polskie Koleje Państwowe	Polish State Railways	PKP	www.pkp.pl
Poland		Rail Polska	Rail Poland	Rail Polska	www.railpolska.pl
Portugal		Caminhos de Ferro Portugueses	Portuguese Railway Company	CP	www.cp.pt
Romania		Compania Națională de Cai Ferate	Romanian National Infrastructure Company	CFR	www.cfr.ro
Romania		Grup Feroviar Roman	Romanian Railway Group	GFR	www.gfr.ro
Romania		Regio Trans Brasov	Romanian Transport Brasov	Regio Trans Brasov	www.regiotrans.ro
Romania		Servtrans Invest	Servtrans Invest	Servtrans Invest	www.servtrans-invest.com
Romania		Societatea Națională de Transport Feroviar de Călători	Romanian National Passenger Train Operating Company	CFR Călători	www.cfr.ro/calatori
Romania		Societatea Națională de Transport Feroviar de Marfă	Romanian National Freight Train Operating Company	CFR Marfă	www.cfrmarfa.ro
Serbia		Železnice Srbije	Serbian Railways	ŽS	www.serbianrailways.com
Slovakia		Bratislavská Regionálna Koľajová Spoločnosť	Bratislava Regional Railway Company	BRKS	www.brks.sk
Slovakia		Železnice Slovenskej Republiky	Slovak Infrastructure Company	ŽSR	www.zsr.sk
Slovakia		Železničná Spoločnosť Cargo Slovakia	Slovak Rail Freight Company	ZSSK Cargo	www.zscargo.sk
Slovakia		Železničná Spoločnosť Slovensko	Slovak Rail Passenger Operator	ZSSK	www.slovakrail.sk

MEMBER RAILWAY AND INFRASTRUCTURE COMPANIES

COUNTRY	Logo	NAME	ENGLISH NAME	ABBREVIATION	WEBSITE
Slovenia		Slovenske Železnice	Slovenian Railways	SŽ	www.slo-zeleznice.si
Spain		Administrador de Infraestructuras Ferroviarias	Spanish Railway Infrastructure Manager	ADIF	www.adif.es
Spain		RENFE Operadora	National Spanish Railway Operator	RENFE Operadora	www.renfe.es
Sweden		Sveriges Branschföreningen Tågoperatörerna	Association of Swedish Train Operators	ASTOC	www.tagoperatorerna.se
Switzerland		BLS Lötschbergbahn	Lötschberg Railway Company	BLS	www.bls.ch
Switzerland		Schweizerische Bundesbahnen / Chemins de Fer Fédéraux Suisses / Ferrovie Federali Svizzere	Swiss Federal Railways	SBB/CFF/FFS	www.sbb.ch
Turkey		Türkiye Cumhuriyeti Devlet Demiryolları	Turkish State Railways	TCDD	www.tcdd.gov.tr



CER GOVERNANCE

CER Presidency (2007 to 2008)				
Francisco José	CARDOSO DOS REIS	President of the Board of Directors	CP	Caminhos de Ferro Portugueses
Roger	COBBE	Policy Director Arriva Train, Member of the ATOC Board	ATOC	Association of Train Operating Companies
Jannie	HAEK	Chief Executive Officer	SNCB/NMBS Holding	SNCB/NMBS Holding
István	HEINCZINGER	Chief Executive Officer	MÁV	Magyar Államvasutak
Martin	HUBER	Director General and Chairman of the Board	ÖBB	Österreichische Bundesbahnen
Antoine	HUREL	Deputy Chief Executive Officer, CER Vice-Chairman	Veolia	Veolia Transport
Jan	KOMÁREK	Director General	SŽDC	Správa Železniční Dopravní Cesty
Constantin	MANEA	Managing Director	CFR	Compania Natională de Cai Ferate
Hartmut	MEHDORN	Chief Executive Officer	DB	Deutsche Bahn
Mauro	MORETTI	Chief Executive Officer, CER Vice-Chairman	FS	Ferrovie dello Stato
Jan	SUNDLING	Chairman of the Board	ASTOC	Branschföreningen Tågoperatörerna
Aad	VEENMAN	President, CER Chairman	NS	Nederlandse Spoorwegen
Andrzej	WACH	President and Chief Executive Officer	PKP	Polskie Koleje Państwowe
Dalibor	ZELENÝ	Director General, CER Vice-Chairman	ŽSR	Železnice Slovenskej Republiky



Members of the CER General Assembly (as on 4 April 2008)				
Matej	AUGUSTÍN	Chairman of the Managing Board and Director General	ZSSK Cargo	Železničná Spoločnosť Cargo Slovakia
István	BÁRÁNY	General Director	CER	CER Central-European Railway Transport, Trading and Service Company
János	BERÉNYI	Chairman and Chief Executive Officer	HUNGRAIL	HUNGRAIL Magyar Vasúti Egyesülés
Janis	BLAZE	Chairman of the Board	BE	Baltijas Ekspresis
Liviu	BOBAR	General Manager	CFR Marfă	Societatea Națională de Transport Feroviar de Marfă
Richard	BROWN	Chief Executive Officer	Eurostar	Eurostar
George	BURUIANĂ	General Manager	Servtrans Invest	Servtrans Invest
Francisco José	CARDOSO DOS REIS	President of the Board of Directors	CP	Caminhos de Ferro Portugueses
Sorin	CHINDE	General Manager	GFR	Grup Feroviar Roman
Milan	CHÚPEK	Chairman and Director General	ZSSK	Železničná Spoločnosť Slovensko
Roger	COBBE	Policy Director Arriva Train, Member of the ATOC Board	ATOC	Association of Train Operating Companies
Costel	COMANA	Chief Executive Officer	RegioTrans Brasov	RegioTrans Brasov
Stasys	DAILYDKA	Director General	LG	Lietuvos Geležinkeliai
Jean-Michel	DANCOISNE	Director General	Thalys	Thalys International
Marc	DESCHEEMAECCKER	Administrateur Délégué	SNCB/NMBS	Société Nationale des Chemins de Fer Belges/ Nationale Maatschappij der Belgische Spoorwegen
Nikola	DIMITROVSKI	Chief Executive Officer	RFYMI	Makedonski Železnici Infrastructure
Peter	DUDÁŠ	Director	BRKS	Bratislavská Regionálna Koľajová Spoločnosť
Vladimir	DUNCHEV	Executive Director	BRC	Bulgarian Railway Company
Narcis	DŽUMHUR	Director General, Chairman of the Board	ŽFBH	Željeznice Federacije Bosne i Hercegovine
Anastasios	EFSTATHIOU	Managing Director	OSE	Organismo Siderodromôn Elladas

Members of the CER General Assembly (as on 4 April 2008)				
Einar	ENGER	President and Chief Executive Officer	NSB	Norges Statsbaner
Søren	ERIKSEN	Chief Executive Officer	DSB	Danske Statsbaner
Irakli	EZUGBAYA	Director General	GR	Saqartvelos Rkinigza
Richard	FEARN	Chief Executive Officer	IÉ	Iarnród Éireann
Anton	GINEV	General Director	NRIC	Nacionalna Kompania Železoplatna Infrastruktura
Miodrag	GOMILANOVIC	President of the Board of Directors	ŽCG	Železnice Crne Gore
Antonio	GONZÁLEZ MARÍN	Chairman	ADIF	Administrador de Infraestructuras Ferroviarias
Jannie	HAEK	Chief Executive Officer	SNCB/NMBS Holding	SNCB/NMBS Holding
István	HEINCZINGER	Chief Executive Officer	MÁV	Magyar Államvasutak
Keith	HELLER	Chief Executive Officer	EWS	English Welsh & Scottish Railways
Detlef	HEYDT	Managing Director	Railion NL	Railion Nederland
Timothy	HOLLOWAY	President of the Board and Chief Executive Officer	Rail Polska	Rail Polska
Martin	HUBER	Director General and Chairman of the Board	ÖBB	Österreichische Bundesbahnen
Antoine	HUREL	Deputy Chief Executive Officer, CER Vice-Chairman	Veolia	Veolia Transport
Süleyman	KARAMAN	Chairman of the Board, Director General	TCDD	Türkiye Cumhuriyeti Devlet Demiryolları
Davorin	KOBAK	President of the Board	HŽ	Hrvatske Željeznice
Jan	KOMÁREK	Director General	ŠZDC	Správa Železniční Dopravní Cesty
Imre	KOVÁCS	Chief Executive Officer	MÁV Cargo	MÁV Cargo
Tamás	KOZÁK	Chief Executive Officer	MÁV-START	MÁV-START
Alex	KREMER	Director General & President of Committee of Directors	CFL	Société Nationale des Chemins de Fer Luxembourgeois
Blagoja	KRSTEVSKI	President of Managing Board and Director General	RFYMT	Makedonski Železnici Transport


Members of the CER General Assembly (as on 4 April 2008)

Henri	KUITUNEN	President and Chief Executive Officer	VR	VR-Yhtymä Oy
Stig	KYSTER-HANSEN	Chief Executive Officer	Railion Scan	Railion Scandinavia
Gunter	MACKINGER	Chief Executive Officer	SLB	Salzburger Lokalbahn
Uģis	MAGONIS	Chairman of the Board	LDZ	Latvijas Dzelzceļš
Constantin	MANEA	Managing Director	CFR	Compania Națională de Cai Ferate
Hartmut	MEHDORN	Chief Executive Officer	DB	Deutsche Bahn
Günter	MELZER	Managing Director	WLC	Wiener Lokalbahnen Cargo
Andreas	MEYER	Chief Executive Officer	SBB/CFF/FFS	Schweizerische Bundesbahnen/Chemins de Fer Fédéraux Suisses/Ferrovie Federali Svizzere
Karl Michael	MOHNSEN	Chief Executive Officer	TX Logistik	TX Logistik
Hristo	MONOV	Executive Director	BDŽ	Balgarski Darželeavni Železnitsi
Mauro	MORETTI	Chief Executive Officer, CER Vice-Chairman	FS	Ferrovie dello Stato
Krzysztof	NIEMIEC	Management Board Member, Development Director	CTL	CTL Logistics

Members of the CER General Assembly (as on 4 April 2008)

Alexandru	NOAPTEȘ	General Manager	CFR Călători	Societatea Națională de Transport Feroviar de Călători
István	PÁKOZDI	Managing Director	VPE	Vasúti Pályakapacitás-Elosztó
Ljubo	PAŠALIĆ	Managing Director	ŽRS	Željeznice Republike Srpske
Guillaume	PEPY	Président	SNCF	Société Nationale des Chemins de Fer Français
Zamir	RAMADANI	Director General	HSH	Hekurudha Shqiptare
Fernand	RIPPINGER	Chief Executive Officer	CFL Cargo	CFL Cargo
Blažo	ŠABAN	Executive Director	ŽCG	Železnice Crne Gore
José	SALGUEIRO CARMONA	President of the Board of Directors	RENFE Operadora	RENFE Operadora
Milanko	ŠARANČIĆ	Director General	ŽS	Železnice Srbije
Tomaž	SCHARA	Director General	SŽ	Slovenske Železnice



Members of the CER General Assembly (as on 4 April 2008)				
Kaido	SIMMERMANN	Chairman of the Management Board & Managing Director	EVR	Eesti Raudtee
Jan	SUNDLING	Chairman of the Board	ASTOC	Branschföreningen Tågoperatörerna
Csaba	SZÉKELY	Director General	GySEV/RoeEE	Győr-Sopron-Ebenfurth Vasút/Raab-Oedenburg-Ebenfurter Eisenbahn
Mathias	TROMP	Chief Executive Officer	BLS	BLS Lötschbergbahn
Aad	VEENMAN	President, CER Chairman	NS	Nederlandse Spoorwegen
Andrzej	WACH	President and Chief Executive Officer	PKP	Polskie Koleje Państwowe
Petr	ŽALUDA	Chairman of the Board and Director General	ČD	České Dráhy
Dalibor	ZELENÝ	Director General, CER Vice-Chairman	ŽSR	Železnice Slovenskej Republiky



CER TEAM



Front row :

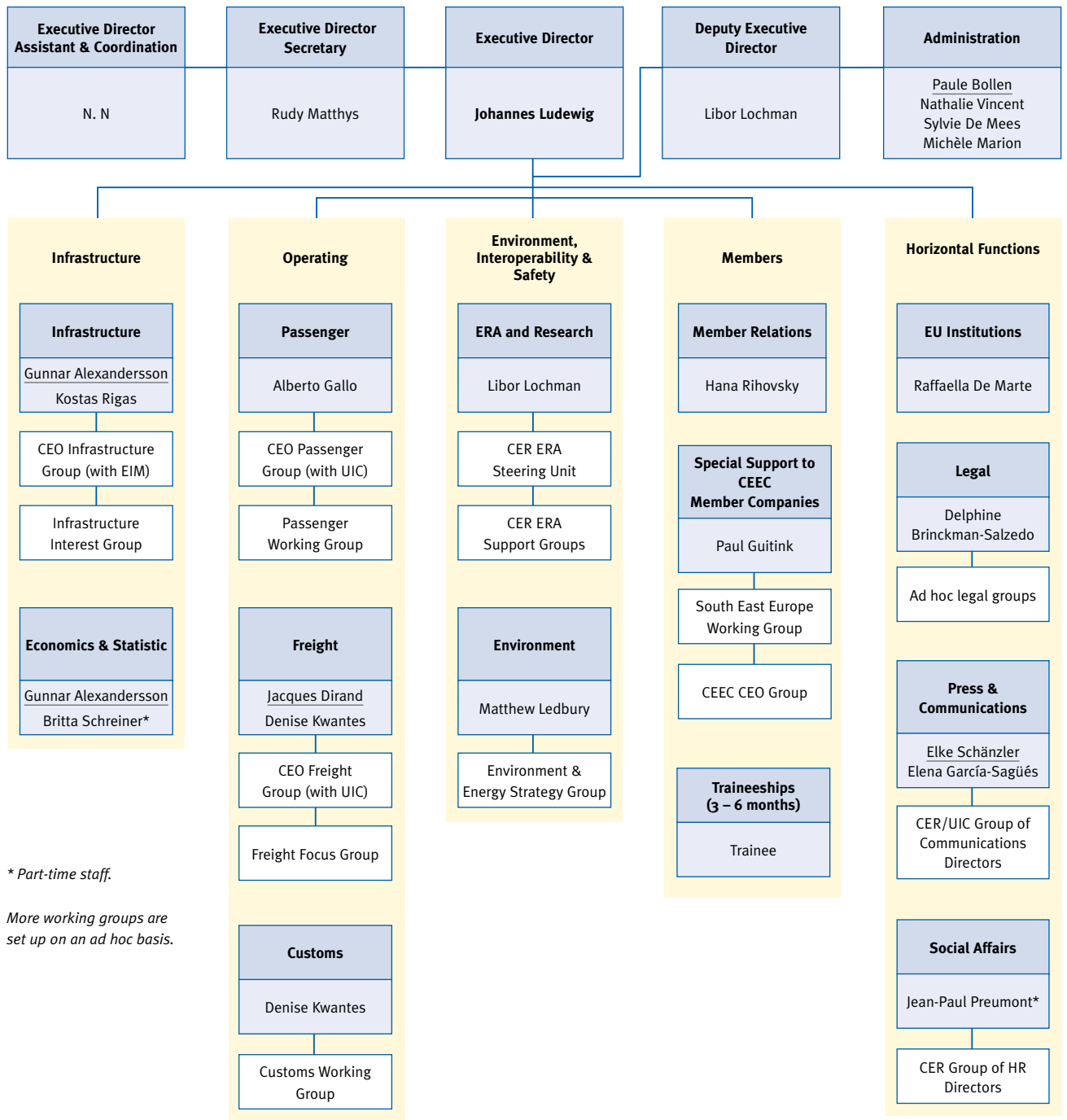
Jos Van Weyenberghe, Raffaella De Marte, Eva Barkley (trainee), Johannes Ludewig, Delphine Brinckman-Salzedo, Hana Rihovsky, Sylvie De Mees, Nathalie Vincent, Elena García Sagüés, Michèle Marion.

Back row:

Alberto Gallo, Denise Kwantes, Britta Schreiner, Elke Schänzler, Kostas Rigas, Jacques Dirand, Paul Guitink, Libor Lochman, Paule Bollen, Rudy Matthys, Gunnar Alexandersson, Matthew Ledbury.

(missing on the picture : Jean-Paul Preumont)

CER working structure



* Part-time staff.

More working groups are set up on an ad hoc basis.

CER PUBLICATIONS 2007/2008

CER Position Papers

- CER Position on ERTMS Consultation, February 2008.
- Sector position to the Safety Directive / wagon keeper issues, January 2008.
- CER Position Paper on the EC Communication on a Rail Network giving Priority to Freight, December 2007.
- CER Position Paper on the Freight Transport Logistics Action Plan, December 2007.
- Position of the sector to the draft Directive on the protection of soil, September 2007.
- CER response to the Commission consultation on Multiannual contracts, September 2007.
- CER Position Paper on the market-based instruments for environment and related policy purposes, July 2007.
- CER-UIC-ERFA-UIP-UIRR-EIM Joint Position Paper on Rail Noise Abatement, July 2007.
- Railways and the European Emission Trading Scheme - The review process, June 2007.

CER Essay Series

- Rail Freight in the USA: Lessons for Continental Europe, January 2008.
- The break-up and privatization of Japan National Railways and management reforms at JR East, December 2007.

CER Studies and Reports

- Towards a Primary European Rail Freight Network, October 2007.
- Business Case Analysis of the Major European Rail Freight Corridors, September 2007.
- Noise Reduction in European Railway Infrastructure, June 2007.
- Mega-Trucks versus Rail Freight, June 2007.

CER Charters & Agreements

- The Concept of Employability in the Railway Sector, October 2007.
- Agreement on Co-operation between CENELEC and CER in the field of Standardization of Electrotechnica, July 2007.
- Railway Community Aspiration on Climate Change, June 2007.
- CER ETF Joint recommendations for a better representation and integration of women in the rail sector, June 2007.
- Resolution of railway companies operating on 1520/1524 mm system, May 2007.

All publications, except for CER books, can be ordered for free from the CER office or downloaded from www.cer.be.

For further documents such as press releases or fact sheets and older publications please check the CER website www.cer.be.

RAILWAY STATISTICS 2007

CER Member	Country	Length of lines	Staff number	Passengers carried	Passenger-kilometres	Freight tonnes carried	Freight Tonne-km	Turnover	Profit
		km		millions	millions	millions	millions	million €	million €
ADIF	Spain	13 226	14 142	–	–	–	–	2 215.9 ^p	-84.7 ^p
ASTOC	Sweden	–	11 200	n/a	10 200	n/a	17 200	n/a	n/a
ATOC	Great Britain	15 795 ^p	n/a	1 213.0	48 448	–	–	7 906.0	n/a
BDŽ	Bulgaria	–	17 446	33.3	2 423	20.2	4 711	217.0	5.2
BE	Latvia	–	123	–	–	2.9	1 110	15.9	0.8
BLS	Switzerland	434	2 502	42.8	637	14.0	3 368	466.3	8.6
BRC	Bulgaria	–	116	–	–	1.4	528	9.6	0.8 ^h
BRKS	Slovakia	–	95	–	–	0.9 ^{a, x}	n/a	n/a	n/a
ČD ^o	Czech Republic	–	53 549	181.9	6 855	90.9	16 961	1 566.0	1.9
CER	Hungary	–	14	–	–	1.1	361	10.8	n/a
CFL	Luxembourg	275	3 018	16.4	316	0.3 ^m	9 ^m	434.0 ^p	3.9 ^p
CFL Cargo ⁿ	Luxembourg	–	381	–	–	8.4	361	120.0	n/a
CFR	Romania	10 777	28 730	–	–	–	–	329.9	-102.0
CFR Călători	Romania	–	17 078	85.8	7 417	–	–	569.3 ^p	-60.0 ^p
CFR Marfă	Romania	–	18 565	–	–	49.6	10 189	549.6 ^p	8.9 ^p
CP	Portugal	–	4 165	134.7	3 610	10.6	2 586	281.8	n/a
CTL	Poland	101	2 500	–	–	18.3	4 068	250.0 ^e	n/a
DB	Germany	33 896	237 078	1 835.0	74 791	312.8	98 794	31 309.0	1 716.0
DSB ^b	Denmark	1 730	9 196	168.3	5 851	–	–	1 424.5	102.3
Eurostar	Great Britain	115 ^y	1 673	8.3	950	–	–	804.0	n/a
EVR	Estonia	1 280	2 096	–	–	36.7	8 118	104.6	n/a
EWS ^c	Great Britain	–	4 767	–	–	74.1	14 066	n/a	n/a
FS	Italy	16 335	96 187	553.0 ^q	45 976 ^q	n/a	32 567 ^q	n/a	n/a
GFR	Romania	–	1 158	–	–	5.0	1 478	78.3	10.9 ^p
GR	Georgia	1 558	14 980	3.9	774	22.2	6 928	n/a	n/a
GySEV/ RoeEE	Hungary/ Austria	288	2 048	5.0	197	6.9	748	156.4 ^e	0.4 ^e
HUNGRAIL	Hungary	7 913	32 907	149.6	8 726	53.9	10 075	n/a	n/a
HSB	Albania	423	1 991	1.1	51	0.4	53	8.4	-1.9
HŽ	Croatia	2 722	13 503	63.1	1 611	15.8	3 574	508.4 ^p	3.6 ^p
IÉ	Ireland	1 713	4 985	45.5	2 007	0.8	129	230	n/a
LDZ	Latvia	2 269	13 620	27.4	983	52.2	16 735	254.1	n/a
LG	Lithuania	1 766	10 535	5.2	409	53.5	14 373	407.5 ^p	47.6 ^p
MÁV	Hungary	7 677	33 651	57.8 ^k	3 044 ^k	–	–	705.1 ^l	5.1
MÁV Cargo	Hungary	–	3 095	–	–	44.5	8 933	365.7	4.2
MÁV-Start	Hungary	–	6 913	54.4	2 987	–	–	136.5 ^j	1.3
NRIC	Bulgaria	4 143	16 660	–	–	–	–	138.1	33.6



— Not applicable

n/a Not available

^a 2006 data.

^b Length of lines only refers to lines served by DSB.

^c Staff numbers are full-time employees only. Volumes exclude rail industry movements. Freight tonne-km includes estimates for international traffic and Eurocargo Rail.

^d EBITDA.

^e Estimate.

^f VPE is a capacity allocation body for the Hungarian railway network. VPE does not provide passenger or freight services, nor is it an infrastructure manager.

^g Rented by RC CF TRANS SRL from CN CFR SA (REGIOTRANS and RC CF TRANS are the property of the same administrator).

^h EBT.

ⁱ Figures exclude Warsaw Commuter Railway (Warszawska Kolej Dojazdowa sp z o o – WKD), while figures for passenger operations and financial data include WKD.

^j Turnover does not include public budget contributions for passenger operations for the second half of 2007 (July-December). Public budget contributions awarded to MÁV-Start in 2007 amounted to € 261.1 million in total.

^k Passenger data only covers the first half of 2007 (January-June) but also includes data on narrow gauge lines for the second half of 2007 (July-December). This is due to the fact that MÁV-Start (passenger transportation activities) became an independent company on 1 July 2007.

^l Turnover does not include public budget contributions for infrastructure in 2007, as well as for passenger operations for the first half of 2007 (January-June). Public budget contributions awarded to MÁV Co in 2007 amounted to € 371,7 million in total.

^m Only includes data from CLB (Conteneurs, Logistique Bettembourg S.A.). Data from CFL Cargo is no longer included.

ⁿ CFL Cargo was founded in October 2006 by merging the transportation resources of the national railway company CFL and ArcelorMittal in Luxembourg.

^o Provisional data before both audit and consolidation. Subsidiaries not included. Based on a contract with SZDC, CD maintains and operates the infrastructure.

^p Provisional.

^q Includes traffic of subsidiaries.

^r Full Time Equivalent.

^s Total results.

^t Wiener Lokalbahnen Cargo (WLC) is the (100%) daughter company of Aktiengesellschaft der Wiener Lokalbahnen (WLB). WLC is a freight operator which was founded in 2007. It carries the cargo traffic which in the past had been carried by WLB.

^u The actual length of tracks (both single, double and multi-tracks) is 15,445 km.

^v Turnover = “Gesamterträge”.

^w Profit = “Ergebnis der gewöhnlichen Geschäftstätigkeit – EGT”.

^x Net tons.

^y 109 kilometres as of 14 November 2007.

RAILWAY STATISTICS 2007

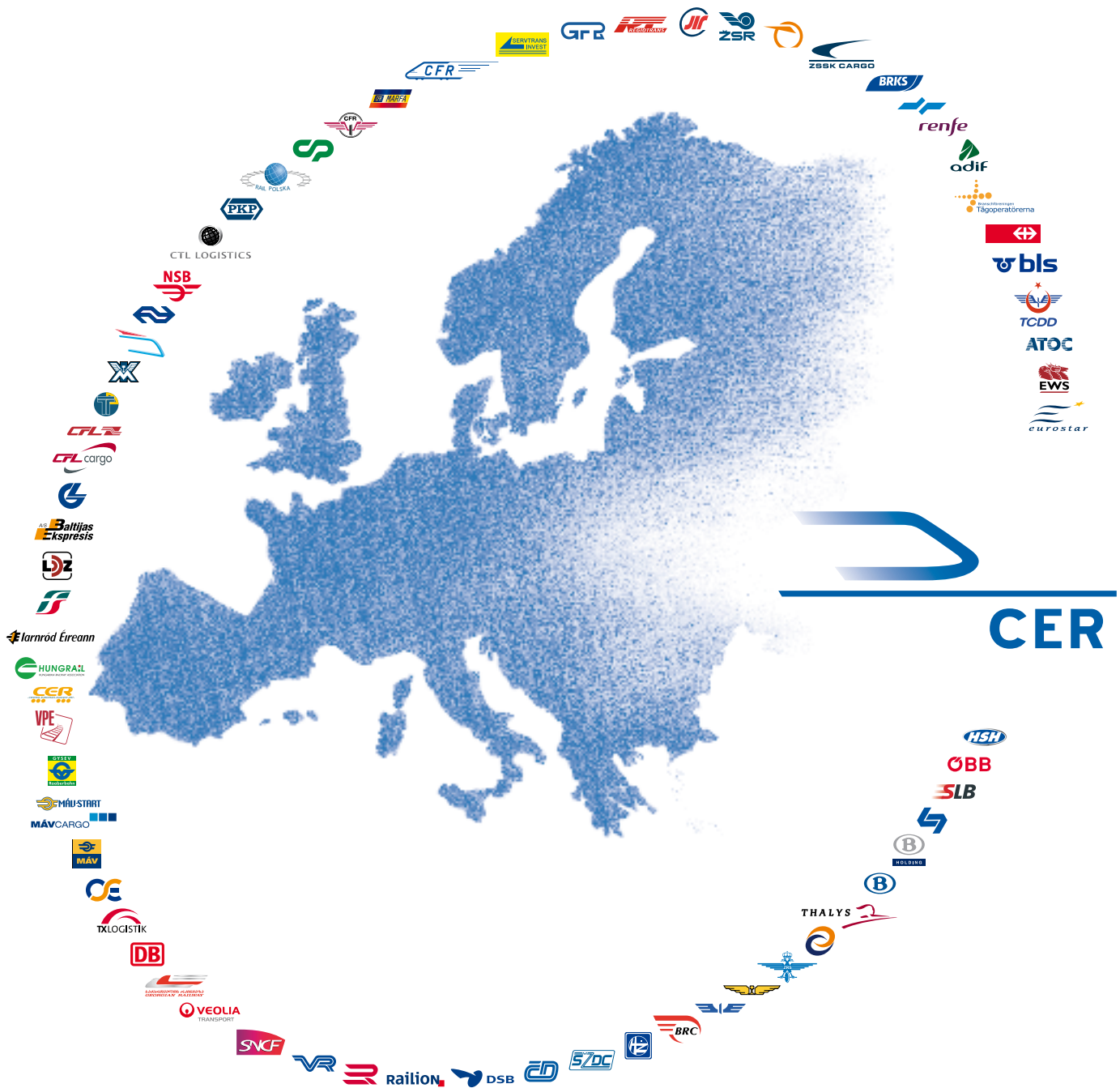
CER Member	Country	Length of lines	Staff number	Passengers carried	Passenger-kilometres	Freight tonnes carried	Freight Tonne-km	Turnover	Profit
		km		millions	millions	millions	millions	million €	million €
NS	Netherlands	–	16 539	333.4	15 546	–	–	2 413.0	337.0
NSB	Norway	4 087	2 461	49.0	2 567	–	–	506.0	30.0
ÖBB ^a	Austria	5 702	42 951	196.0	8 646	93.0	18 868	5 466.0 ^v	32.3 ^w
OSE	Greece	2 509	7 197	13.4	1 954	4.8	829	n/a	n/a
PKP	Poland	19 419 ⁱ	123 301 ⁱ	221.0	17 727	153.5	43 558	3 153.8 ^p	-11.1 ^p
Rail Polska	Poland	–	280	–	–	1.6	242	n/a	n/a
Railion Danmark	Denmark	–	332	–	–	6.6	1 735	62.7	0.4
Railion Nederland	Netherlands	–	988	–	–	31.9	4 689	134.4	n/a
RENFE Operadora ^p	Spain	–	14 338	507.0	19 966	25.0	10 547	2 157.6	125.7 ^d
Regio Trans Brasov	Romania	543 ^g	293	2.4	56	–	–	1.6	-0.1
RFYMI	Macedonia	699	1 497	–	–	–	–	n/a	n/a
RFYMT	Macedonia	–	1 419	1.1	109	4.7	779	n/a	n/a
SBB/CFF/FFS	Switzerland	3 011	27 438	306.7	15 134	53.7	13 370	4 887.5	51.2
Servtrans Invest ^p	Romania	71	763	0.1	3	5.2	1 321	43.0	-4.1
SLB	Austria	35	150	4.8	58	1.5	139	n/a	n/a
SNCB/NMBS Holding	Belgium	3 536	36 763	206.5	9 933	57.7	8 149	3 310.4	24.7
SNCB/NMBS	Belgium	–	18 676 ^r	206.5	9 933	57.7	8 149	2 157.8	-6.1 ^s
SNCF	France	–	161 656	1 043.5 ^p	81 608 ^p	105.7	40 635	17 406.0	997.0
SŽ	Slovenia	1 228	7 949	16.1	812	17.6	3 603	329.1	22.4
SŽDC	Czech Republic	9 483 ^u	622	–	–	–	–	n/a	n/a
TCDD	Turkey	8 697	31 244	81.3	5 553	20.8	9 755	253.0	-277.0
Thalys	Belgium/France	–	110	6 210.0	2 248	–	–	364.1	n/a
TX Logistik	Germany	–	151	–	–	4.3	1 949	107.9	n/a
Veolia Transport	France	–	3 088	53.0	1 691	36.0	1 800	458.0	n/a
VPE ^f	Hungary	–	12	–	–	–	–	1.5 ^p	0.3 ^p
VR	Finland	5 899	9 988	66.7	3 778	40.3	10 434	758.2	38.4
WLC ^t	Austria	–	45	–	–	2.7	645	33.2	0.5
ŽCG	Montenegro	330	1 954	1.2	135	1.8	183	26.2	-8.7
ŽFBH	Bosnia-Herzegovina	601	4 011	0.4	32	7.2	757	58.8	n/a
ŽRS	Bosnia-Herzegovina	416	3 415	0.7	36	4.9	369	34.0	-7.0
ŽS	Serbia	3 809	19 890	9.8	762	14.9	4 551	373.0	68.8
ŽSR	Slovakia	3 629	17 982	–	–	–	–	295.4	564.3
ZSSK	Slovakia	–	4 866	45.6	2 148	–	–	248.7	-1.7
ZSSK Cargo	Slovakia	–	10 968	–	–	49.2	9 331	495.5 ^p	-18.3 ^p

LIST OF ABBREVIATIONS

AEIF	Association Européenne pour l'Interopérabilité Ferroviaire/ European Association for Railway Interoperability
AEO	Authorised Economic Operator programme
CCS	Control Command and Signalling System
CEEC	Central and Eastern European Countries
CEN	Comité Européen de Normalisation/ European Committee for Standardisation
CENELEC	Comité Européen de Normalisation Electrotechnique / European Committee for Electrotechnical Standardization
CER	Community of European Railway and Infrastructure Companies
CIM	Convention internationale concernant le transport des marchandises par chemin de fer / International Convention concerning the Carriage of Goods by Rail
CIT	Comité International des Transports Ferroviaires / International Rail Transport Committee
EBU	European Blind Union
EC	European Commission
ECCP	European Climate Change Programme
EDI	Electronic Data Interchange
EEA	European Environmental Agency
EEIG	European Economic Interest Grouping
EFTA	European Free Trade Association
EIM	European Rail Infrastructure Managers
EP	European Parliament
EPF	European Passenger Federation
ERA	European Railway Agency
ERIM	European Rail Infrastructure Masterplan
ERTMS	European Rail Traffic Management System
ETF	European Transport Workers' Federation
ETS	European Emissions Trading Scheme
ETSI	European Telecommunications Standards Institute

LIST OF ABBREVIATIONS

EU	European Union
GDP	Gross Domestic Product
HGV	Heavy Goods Vehicles
HVF	Heavy Vehicle Fee
IPCC	Intergovernmental Panel on Climate Change
NAPs	National Allocation Plans
NCTS	New Computerised Transit System
PERFN	Primary European Rail Freight Network
PRM	Persons with Reduced Mobility
RMMS	Rail Market Monitoring System
RNE	RailNetEurope
SEDP	Strategic European Deployment Plan
SNCF	Société Nationale des Chemins de Fer Français
TAF TSI	Technical Specification for Interoperability on Telematic Applications for Rail Freight
TEN-T	Trans – European Transport Network
TGV	Train à Grande Vitesse / High Speed Train
TRAN	Committee on Transport and Tourism in the European Parliament
TSI	Technical Specifications for Interoperability
UIC	Union Internationale des Chemins de Fer / International Union of Railways
UIP	International Union of Private Waggon Owners
UITP	International Union of Public Transport / Union Internationale des Transports Publics
UNIFE	Union of European Railway Industries



Editorial deadline: 4 April 2008
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"GROUPE DES 6" – GROUP MEETS WITHIN UIC
 "GROUPE DES 9" – GROUP MEETS WITHIN UIC
 "GROUPE DES 12" – GROUP MEETS WITHIN UIC

1988 1989 1990 1991 1992 1993 1994 1995 1996

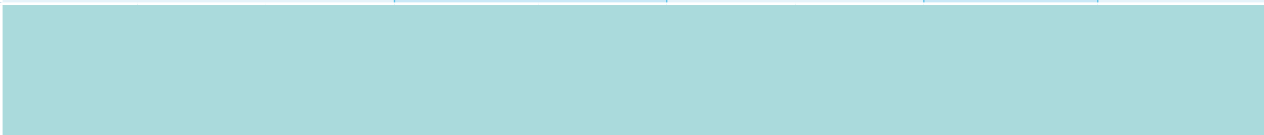
CER / CCFE / GEB - Community of European Railways / Communauté des Chemins des Fers Européens / Gemeinschaft der Europäischen Bahnen - becomes an independent grouping within UIC, with its own office in Brussels.
 A first request to change the status of CCFE / CER / GEB to become European grouping of economic interest is introduced in 1990 but is not approved

CER / CCFE / GEB - Community of European Railways acquires legal personality as an international association

 Bob Reid - British Rail 1988 - 1990	 Leo Ploeger - NS 1991	 Etienne Schouppe - SNCB 1992 - 1995	 Trevor Halvorsen - Secretary 1995 - 1998
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 Erik Van den Broele - Secretary General 1988 - 1995	 Trevor Halvorsen - Secretary 1995 - 1998
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14 members	15 Members (14 + 1)	16 Members (15 + 2 - 1)	17 members (16 + 1)	22 Members (17 + 5)
SBB (Schweizerische Bundesbahnen - Switzerland), CFL Société Nationale des Chemins de Fer Luxembourgeois - Luxembourg), CH (Hellenic Railway Organisation - Greece), CIE (Córas Iompair Éireann - Ireland), CP (Caminhos de Ferro Portugueses - Portugal), DB (Deutsche Bahn - Germany), DSB (Danske Statsbaner - Denmark), FS (Ferrovie dello Stato - Italy), NS (Nederlandse Spoorwegen - Netherlands), ÖBB (Österreichische Bundesbahnen - Austria), RENFE (Red Nacional de los Ferrocarriles Españoles - Spain), SNCB/NMBS (Société Nationale des Chemins de Fer Belges / Nationale Maatschappij der Belgische Spoorwegen - Belgium), SNCF (Société Nationale des Chemins de Fer Français - France), British Railway Board (UK)	DR (Deutsche Reichsbahn - Germany) joins CER	NSB (Norges Statsbaner - Norway) and SJ (Statens Järnvägar - Sweden) join CER as observers (as formal negotiation processes to become a member of EC have started) — DR (Deutsche Reichsbahn - Germany) joins DB	VR (VR-Yhtymä Oy - Finland)	BV (Banverket - Sweden), RT (Railtrack - UK), RHK (Ratahallintokeskus - Finland), BS (Banestyrelsen - Denmark) and JBV (Jernbaneverket - Norway) join CER



	First European-wide initiative to set the foundations for market opening, i.a. requirement to separate accounts for "Railway Undertakings" and "Infrastructure Managers" (Directive 91/440/EEC)		First Eurovignette Directive 1993/89/EEC provides guidelines on charging lorries for road use		Directive 95/18/EC, dealing with licensing of railway undertakings Directive 95/19/EC, dealing with details of path allocation and charging rail infrastructure fees Regulation 2236/95 dealing with financial aid for Trans-European Networks	Directive 96/48/EC on the interoperability of High-Speed rail system Decision 1692/96/EC dealing with TEN (Trans-European Network) guidelines
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Maastricht Treaty signed

Stanley Clinton Davis	Karel van Miert		Abel Matutes	Marcelino Oreja	Neil Kinnear
Delors Commission	Delors Commission II		Delors Commission III		Santer Commission

1988 1989 1990 1991 1992 1993 1994 1995 1996

ys / Communauté des Chemins des Fers Européens / Gemeinschaft der Europäischen Bahnen
 tion (aisbl) and is now independent of UIC

 <p>Heinz Dürr - DB 1996 – 1997</p>	 <p>Rob den Besten - NS 1998 - 1999</p>	 <p>Louis Gallois - SNCF 2000 - 2001</p>	 <p>Giancarlo Cimoli - FS 2002 - 2004</p>	 <p>Karel Vink - SNCB 2004 - 2005</p>
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<p>General</p>  <p>Anna Otavianelli - Secretary General 1999 – 2001</p>	 <p>Johannes Ludewig - Executive Director 2002 - Present</p>
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<p>24 members (22 + 2)</p> <p>RFF (Réseau Ferré de France - France) and REFER (Rede Ferroviária Nacional - Portugal)</p>	<p>32 Members (24 + 9 - 1)</p> <p>BLS (BLS Lötschbergbahn - Switzerland), ATOC (Association of Train Operating Companies - UK), CD (Ceské Dráhy - Czech Republic), EVR (Eesti Raudtee - Estonia), Eurotunnel (France / UK), MAV (Magyar Államvasutak - Hungary), GySEV (Győr-Sopron-Ebenfurth Vasút - Hungary / Austria), PKP (Polskie Koleje Panstwowe - Poland), and SZ (Slovenske Zeleznice - Slovenia) join CER</p> <p>British Railway Board (UK) is dissolved</p>	<p>Nordic Infrastructure Managers (NIM) meet occasionally within CER.</p>	<p>25 Members (32 - 7)</p> <p>European Infrastructure Managers (EIM) become independent organisation EIM comprises infrastructure companies of</p> <p>RHK (Ratahallintokeskus - Finland), BV (Banverket - Sweden), JBV (Jernbaneverket - Norway), BS (Banestyrelsen - Denmark), RT (Railtrack - Great Britain), RFF (Réseau Ferré de France - France) and REFER (Rede Ferroviária Nacional - Portugal)</p>	<p>34 Members (25 + 10 - 1)</p> <p>LDz (Latvijas Dzelzelš - Latvia), CFR (Compania Natională de Cai Ferate - Romania), Railion (Denmark), Railion (Netherlands), BDŽ (Balgarski daržavni Železnitsi - Bulgaria), LG (Lietuvos Geležinkeliai - Lithuania) and HZ (Hrvatske Željeznice, Croatia) join CER</p> <p>ŽSK (Železničná Spoločnosť Slovensko - Slovak Republic), ŽSR (Železnice Slovenskej Republiky - Slovak Republic), and SŽDC (Správa Železniční Dopravní Cesty, Czech Republic) join CER</p> <p>SJ (Statens Järnvägor - Sweden) is dissolved. Independent companies emerge after restructuring.</p>	<p>40 Members (34 + 6)</p> <p>Connex (France), SLB (Salzburger Lokalbahn - Austria), JZ (Zajednica Jugoslovenskih Železnica - Serbia/Montenegro) and ASTOC (Sveriges Branschföreningen Tågoperatörerna - Sweden) join CER</p> <p>Having emerged after the restructuring of the rail sector, NRIC (Nacionalna Kompania Železoplatna Infrastruktura - Bulgaria) and VPE (Vasúti Pályakapacitás-Elosztó - Hungary) join CER</p>
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	<p>CER/UIC/CIT Rail Passenger Service Charter 2002</p>	<p>CER/UIC/CIT Freight Quality Charter 2003</p>	<p>CER-ETF agreement on a European licence for train drivers CER-ETF agreement on working conditions for cross-border services</p>
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<p>Non road mobile machinery directive setting pollution levels of diesel engines in Directive 1997/68</p>	<p>First amendment of the Eurovignette Directive 1999/62/EC</p>	<p>First Railway Package First step towards rail market opening – international freight. Directive 2001/12/EC revises Dir 91/440, Directive 2001/13/EC revises Dir 95/18, Directive 2001/14/EC repeals Dir 95/19, Directive 2001/16/EC deals with interoperability of the conventional rail system</p>	<p>Noise Directive 2002/49/EC</p>	<p>Rail Statistics Regulation (EC) 91/2003</p>	<p>Second Railway Package Second step towards market opening – entire freight market. Directive 2004/51/EC revises Dir 91/440 ff, Directive 2004/49/EC on safety revises Dir 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</p> <p>TEN-T Decision No. 884/2004/EC revises the TEN Guidelines, whilst Regulation (EC) 807/2004 revises the TEN financial Guidelines</p> <p>Environmental liability is legislated in Directive 2004/35/EC Revised NRRM Directive 97/68, setting pollution levels of diesel engines in Directive 2004/26</p>
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Amsterdam Treaty signed	Treaty of Nice signed	European Constitution signed but sub in referendums.
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Prodi Commission	Loyola de Palacio
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2005	2006	2007	2008				
Community of European Railway and Infrastructure Companies				Development of CER			
 <p>Aad Veenman - NS since 2005</p>				CER Presidents			
				CER Secretary Generals / Executive Directors			
				CER MANAGEMENT			
<p>50 Members (40 + 10)</p> <p>ŽRS (Željeznice Republike Srpske - Bosnia Herzegovina), ADIF (Administrador de Infraestructuras Ferroviarias - Spain), Thalys International (Belgium), ŽFBH (Željeznice Federacije Bosne i Hercegovine - Bosnia Herzegovina) and EWS (English, Welsh and Scottish Railways - UK) join CER</p> <p>Romanian membership of CER is restructured to represent three separate companies: CFR (Infrastructure), CFR Marfă (Freight) and CFR Călători (Passengers) become separate members.</p> <p>JZ (Zajednica Jugoslovenskih Železnica - Serbia/Montenegro) is restructured to represent two different companies: ŽS (Željeznice Srbije - Serbia) and ŽCG (Željeznice Crna Gora - Montenegro).</p> <p>Further restructuring in the Slovak Republic leads to ŽSSK Cargo (Železničná Spoločnosť Cargo) joining CER The Georgian railway company GR joins CER as an associate member</p>		<p>54 Members (50 + 5 - 1)</p> <p>Eurostar UK (United Kingdom), HSH (Hekurudha Shqiptare - Albania), RFYROM (Makedonski Železnici - Macedonia), Rail Polska (Poland) and CER Central - European Railway - Hungary) join CER</p> <p>Due to financial difficulties, Eurotunnel leaves CER</p>		<p>70 Members (54 + 16)</p> <p>Baltijas Ekspressis (Latvia), BRC (Bulgarian Railway Company - Bulgaria), Servtrans Invest (Romania), CTL Rail (Poland), WLB (Wiener Lokalbahnen - Austria), HRA (Hungarian Railway Association - Hungary), TCDD (Turkish State Railways - Turkey), GFR (Grup Feroviar Roman - Romania), TX Logistik (Germany), Regio Trans Brasov (Romania) and BRKS (Bratislavská Regionálna Koľajová Spoločnosť - Slovak Republic).</p> <p>Restructuring of the rail sector means that</p> <p>RFYMI (Macedonian Railways Infrastructure - Macedonia), RFYMT (Macedonian Railways Transport - Macedonia), MAV Cargo (Hungary), CFL Cargo (Luxembourg), MÁV-START (Hungary) and SNCB/NMBS (Belgium) join CER</p>		CER Membership	
				CER voluntary commitments			
				Proposed Joint Commitment on sector wide reduction of carbon dioxide emissions (forthcoming)			
		<p>Third Railway Package Third step towards rail market opening – passenger market. Regulation 1371/2007 on Passenger rights, Passenger liberalisation Directive 2007/58 and Train crew certification Directive 2007/59</p> <p>Public Service Regulation Regulation 1370/2007 on public-service obligations (PSO)</p>		<p>Revised Directive for Interoperability to include the cross-acceptance of rolling stock – Directive 2008/xxx</p> <p>Expected legislation for 2008:</p> <ul style="list-style-type: none"> Revised Safety Directive. Revised ERA Regulation Guidelines for the application of state aid Framework Directive for the transport of dangerous goods New customs code European green house gas emission targets 		Milestones in European Rail Policy	
		<p>TAF TSI (Telematic Applications for Freight - Technical Specification for Interoperability) Regulation 62/2006</p> <p>Second revision of the Eurovignette Directive 2006/38/EC, allowing Member States to apply tolls on all roads, not just on the TEN road network</p>		Legal Developments			
<p>subject to ratification by all member states. France and Netherlands rejected it</p>				Treaties			
<p>Treaty of Lisbon</p>				EU Developments			
<p>Jacques Barrot</p>				Transport Commissioner			
<p>Barroso Commission</p>				Commission			
2005	2006	2007	2008				





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