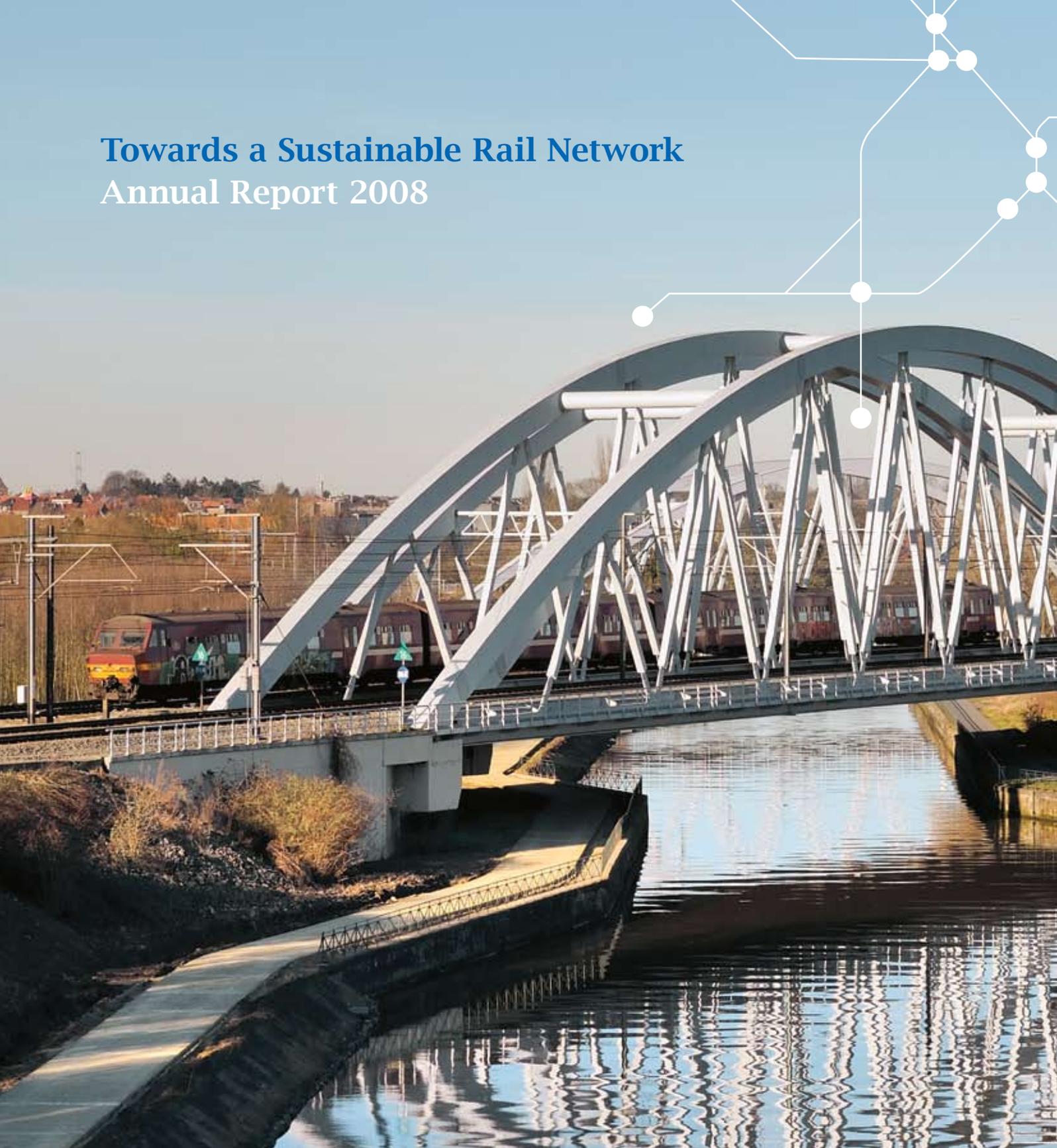


Towards a Sustainable Rail Network

Annual Report 2008



COMMUNITY OF EUROPEAN RAILWAY AND INFRASTRUCTURE COMPANIES

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STRASBOURG

STUTTGART

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ZÜRICH

BERN

FOREWORD

2008 will be remembered as the year in which the global financial and economic crisis hit Europe. The recession is having a major impact on European railways, particularly in the rail freight sector. We have seen a progressive decline in freight traffic since mid-2008 throughout Europe. The figures worsened in January 2009 with freight traffic volumes declining by about 35% compared to January 2008.

Growth is not expected to resume in Europe before 2010. As rail freight traffic is closely correlated to overall economic growth, we expect that **growth will not return to the rail freight sector before 2011.** Railways throughout Europe are responding to the downturn by cutting or postponing investments and seeking new sources of finance. There is a risk that some railways will collapse or that the loss of service quality will lead to a massive and irreversible loss of traffic.

The European Union is struggling in its response to the problems of the transport sector and railways in particular. The European Commission has brought forward some funds for the trans-European transport network (TEN-T) from 2010 to 2009. However, big economic stimulus packages announced by the European Union (EU) and its member states do not adequately address infrastructure for green transport. Even worse, the plans focus too much on retaining the current unsustainable structure of the transport sector, and give too little thought to restructuring the sector for a more sustainable future. This runs contrary to the EU's efforts to meet long-term greenhouse gas emission reduction targets.

Before the economic crisis hit, the environmental crisis in shape of climate change was at the top of the European agenda. The EU committed itself to reducing overall emissions to at least 20% by 2020. However, greenhouse gas emissions in the EU from transport have been steadily increasing and are projected to continue to do so. CO₂ emissions from transport are currently increasing at around 2% a year, 70% of which comes from road transport. One reason is that **economic growth is still too transport intensive.**

The rate of growth in emissions from transport will significantly undermine the EU's efforts to meet long-term reduction targets unless action is taken. We believe that it is essential to put in place proper pricing mechanisms that reflect the real costs of transport. The debate on a revision of the Eurovignette directive will continue in 2009 with the aim of making the true cost of transport more transparent.

In the reporting period covered by this annual report (January 2008 to January 2009) we have seen the publication of the Commission's package on greening transport as well as the adoption of important dossiers like the package on European railway safety and interoperability. Important initiatives have also come from within the rail sector.

During 2008 the rail sector decided to lead by example when the chief executives of 70 railway and infrastructure companies committed themselves to a 30% cut in the specific CO₂ emissions for trains over the period 1990 to 2020. This agreement was reached just before CER's 20th anniversary celebrations, which were attended by more than 400 guests including European Commission President José Manuel Barroso, leading MEPs and European transport ministers.

In 2009, CER's work programme is no less ambitious. We will continue to drive the debate on the internalisation of external costs, advance the issue of financing rail infrastructure and rail freight corridors in times of crisis, further raise the sector's environmental profile, increase awareness on the critical situation of rail transport in Central and Eastern Europe and further stress the problem of undercompensation regarding public service obligations. These are just some of the challenges our industry faces. **We will only succeed in our task if we work closely together with our members, the European institutions and national governments.**

We would like to use this opportunity to thank you sincerely for all your continuous support of European rail transport throughout 2008. We would also like to express our gratitude towards Aad Veeman, who recently resigned as CER Chairman, for the excellent work done in the last years and for his contribution to the development of the railway sector.

Despite the upcoming European elections and a slowing down of the political process in Brussels, we are hoping that 2009 will be remembered as the year when the EU mastered the crisis and made transport more sustainable – both ecologically and economically.



Mauro Moretti
CER Chairman



Johannes Ludewig
CER Executive Director

Towards a sustainable rail transport

Vice-President Antonio Tajani, Commissioner for Transport

The European Commission is working towards sustainable mobility – mobility that not only ensures the efficient and safe transportation of goods and people, but also meets our common economic, social and environmental needs.

The Greening Transport Package, adopted last year by the European Commission, aims to tackle pollution and climate change by making the polluter, not the taxpayer, pay for environmental damages. The package included a strategy on internalising external costs, a proposal to revise the so-called Eurovignette directive to charge heavy goods vehicles for infrastructure use, and a communication to reduce the noise from rail freight trains. These initiatives are just part of the Commission's contributions to the goal, promoted by the European Community, of a more competitive, efficient and interoperable European rail transport.

Over the last few years, we have witnessed increased competitiveness and improved performance within the railway sector, which demonstrates we are beginning to reap the benefits of the Community's three-pillared approach: opening rail markets to competition, promoting interoperability and common safety standards across Europe and contributing to the development of high-quality European rail infrastructure and rolling-stock. Here, I highlight just a few examples of recent successes and upcoming initiatives from our policy agenda.

The national rail freight transport markets have been open since 1 January 2007 and the international market since 2006. As a result, after years of decline, freight transport by rail started to increase again. The coming year will be crucial in realising our rail policy objectives. At the end of 2009 new regulations on public services and rail passenger rights come into force, while on 1 January 2010 the market for international passenger services will be opened.

The implementation of the First Railway Package clearly showed that, despite progress, considerable efforts are still necessary. National implementing measures reveal several key areas requiring further change including:

- Management independence for railway undertakings and the separation of accounts for subsidised and non-subsidised activities.
- Neutrality of essential functions with capacity allocation and infrastructure management to prevent distortion of the market and conflicts of interests between new railway undertakings and incumbents.

- A framework for infrastructure charging and financing with appropriate incentives for all actors to optimise their use of the network.
- An effective administrative and institutional framework for the railway sector in the EU member states to guarantee a level playing field for all.

The Commission intends to put together all rail legislation on market access in a single Community act. We are currently evaluating ways to best simplify, and further enhance, provisions on market access in order to support the development of a truly European rail transport market. In June 2008 the Commission launched infringement procedures against 24 member states to push them to comply with their EU treaty obligations on matters such as the independence of essential functions, charging principles and the authority of the regulator. We intend to pursue the infringements vigorously.

New provisions adopted at the end of 2008 on the cross-acceptance of rolling stock will reduce repetitive, lengthy and costly safety-certification procedures in individual member states by implementing the principle of mutual recognition.

Great progress is being made in the deployment of the European Rail Traffic Management System (ERTMS), a major European industrial project to improve the competitiveness and safety of rail transport. In July 2008 I signed a Memorandum of Understanding, on behalf of the European Commission, with six organisations from Europe's railway sector, including CER. This document is aimed at speeding up deployment of the ERTMS and it demonstrates a common ambition to collaborate across Europe. In 2009 we intend to adopt a binding European deployment plan for ERTMS. It will not only ensure interoperability of national railway systems but will also reduce the purchasing and maintenance costs of signalling systems and enhance safety.

Another Commission proposal aims to boost the capacity, quality and reliability of rail freight in Europe and foresees the creation of a light but effective corridor governance structure, a European core network of international freight-oriented corridors. It also envisages co-ordination mechanisms for infrastructure maintenance and investment as well as good and adequate capacity for priority freight trains on the corridors.

In order to promote development of high-performance rail transport infrastructure, the Community provides considerable financial support to member states through the trans-European transport network (TEN-T) budget and the regional and cohesion funds. The recently published Green Paper on the future of TEN-T policy reflects upon future guidelines and funding instruments for the long-term, and we look forward to your contributions during the consultation process.

The current economic climate is a critical factor for Europe's railways and is causing a financial strain, particularly on rail freight operators. Nevertheless, with a coordinated response at member state and European level, it has also triggered unprecedented investment in infrastructure and has resulted in extraordinary opportunities for the development of Europe's railways. Under the European Economic Recovery Plan, €500 million of Community co-financing for infrastructure projects was made available.

The transformation of Europe's railway markets is already at a relatively advanced stage, but is not yet complete. However, a single interoperable European railway area is emerging. The Community of European Railway and Infrastructure Companies is one of the key players that can contribute to its realisation. Today's environment is one of opportunity and I would like to emphasise that CER and the railways can count on the support of the European Commission as much as we count on theirs.



Antonio Tajani, European Commission Vice-President and Commissioner for Transport, at the European Railway Award 2009



ZÜRICH

BERN

LYON

MARSEILLE



CHAPTER 1

INTRODUCING CER

The Voice of European Railways

Around 15,000 lobbyists and 2,500 lobby organisations are based in Brussels. All of them are trying to articulate and represent various interests during the political decision-making process. For 20 years CER has been recognised as the voice of European railways in this competitive environment - delivering practical and reliable information to all European institutions in the debate about the future of (rail) transport.

The Community of European Railway and Infrastructure Companies (CER) is the leading European railway organisation. It was founded in 1988 with 12 members and now brings together 72 railway undertakings and infrastructure companies – private and state-owned, large and small. Our members come from the European Union, the candidate countries (Croatia, Macedonia and Turkey) as well as from the Western Balkan countries, Norway, and Switzerland. CER is based in Brussels and represents the interests of its members to the European Parliament, Commission and Council of Ministers as well as to other policymakers and transport actors. CER's main focus is to promote a strong rail industry that is essential to the creation of a sustainable transport system which is efficient, effective and environmentally sound.

Lobbying by quality

A key priority for CER is to achieve a more balanced split between the different modes of transport. We believe a better modal split will eliminate high external costs to society and improve economic efficiency. In parallel to the railways' own initiatives for improving the quality of rail services, CER sees mobilising adequate investments in rail infrastructure as a prerequisite for achieving a sustainable modal split. In June 2008 CER joined the European Commission's online register of interest representatives. By registering, CER has enhanced the transparency of its relations with the Commission as with other European institutions before. CER's interests cover all policy areas that have the potential to impact on railway transport. In close cooperation with its members, CER monitors and evaluates the implementation of policies. Through our permanent dialogue with policymakers we propose adjustments of legislation to address remaining problems.

Communicate the railways

Using a wide range of communications tools, CER aims to present the positions of railways to European institutions and the public and to inform CER members about recent developments in European transport policy. Our website (www.cer.be) is the easiest way to find our position papers, brochures, press releases, event information and more. The main challenges for communications are building the reputation of CER as a competent and reliable partner and

bringing the railway messages to the fore in a complex environment. Events and media relations are used to raise awareness for CER's positions while publications provide essential information on many issues. Internal communications tools, like the weekly newsletter, CER Monitor, ensure that CER members are up-to-date on recent transport developments in the EU.

Dialogue with partners

CER wants to be a reliable, competent and committed partner, building stable relationships on the principle of active and transparent dialogue between the industry and the European institutions. To achieve this aim we foster a common and united European railway community. A number of other rail organisations are regularly invited to participate in CER working groups. Discussions on infrastructure, freight, and passenger issues are regularly held between CER experts from the Brussels office and CER members and representatives from the European Rail Infrastructure Managers (EIM), the International Union of Railways (UIC), the European Rail Industry (UNIFE) and the International Union of Public Transport (UITP). Since its establishment in 2004 by the EU, the European Railway Agency (ERA) has become another key partner in all technical harmonisation issues (see article page 14). CER also maintains close relationships with the European Federation of Railway Trackworks Contractors (EFRTC), the European Transport Workers' Federation (ETF), and the International Union of combined Road-Rail transport companies (UIRR) among others. On specific issues CER also liaises with non-rail organisations including non-governmental organisations such as Transport and Environment (T&E) and road lobby organisations such as the International Road Transport Union (IRU) or the Federation Internationale de l'Automobile (FIA). More information on how CER works can be found on page 37.



MIDDLESBROUGH

HULL

HARWICH

THAMESPORT

ROTTERDAM

ZEEBRUGGE

LILLE

PARIS

PERPIGNAN

GENOA

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Promoting rail freight through corridors

The creation of pan-European rail freight corridors has been supported by CER for many years. Corridors are expected to increase the speed and capacity of rail freight and to improve its reliability – resulting ultimately in reduced costs and an increase in the competitiveness of the sector. This will further promote the modal shift from road to rail and help to absorb the projected growth in general transport demand, which studies estimate will double by 2020.

In 2008 the political desire to make rail freight more competitive resulted in the Commission's regulation proposal concerning a European rail network for competitive freight. CER followed the debate closely and voiced early concerns that legislation on rail freight will not be sufficient to remove existing bottlenecks. We believe the legislation only regulates scarce capacities when investment is needed to expand or upgrade infrastructure. The Green Paper on the revision of the TEN-T policy, published in February 2009, offers another good opportunity to further promote investment in sustainable rail infrastructure during this year. However, in addition to any European legislation or funding, the political will of national governments to coordinate investment behaviour at the member state level is needed to create successful rail freight corridors.

The priority rail freight network

The European Commission first introduced the concept of a dedicated European freight network in its 2001 White Paper on Transport Policy, which stated that efficient international train paths should be allocated to freight. But it was October 2007 before the Commission presented an initiative to make the transportation of goods by rail more attractive. The communication on a freight-oriented railway network aims to boost Europe's rail sector by tackling problems of efficiency, reliability and competitiveness. Proposed measures include the harmonisation of train lengths and loads to increase interoperability.

5 years

Time it took the Commission to step back from earlier plans to legislate on rail freight quality. The Parliament and the Council had doubts whether quality could really be regulated by law. CER shared these doubts: quality can only result from a combination of internal and external factors, such as the introduction of competition and the provision of an infrastructure free from bottlenecks.

The Commission's intention to boost international rail freight traffic was largely supported by European transport ministers at a Council meeting in April 2008. Governments invited the Commission to take further measures to achieve the efficient operation of international rail freight services by reinforcing cooperation between infrastructure managers and by identifying cross-border corridors, taking into account the particular circumstances in any section of a corridor. The Council in addition sent a clear signal to member states that they must improve coordination of national investment plans if they want to establish high-quality international corridors for freight. The transport ministers also acknowledged their readiness to promote the governance of corridors through corridor structures, that is, decision-making bodies made up of representatives from national transport ministries, infrastructure managers and railway undertakings.

After the Council meeting in April 2008, the Commission started to prepare a regulation proposal to support the development of rail freight corridors. Stakeholders were asked to share their expertise and views through a public consultation which was run in summer 2008. CER responded to the consultation and encouraged its members to complete the questionnaire. The Commission received more than 300 replies from the transport and logistics sector, including 20 from railway operators and 16 from infrastructure managers. Results of the consultations showed that most stakeholders identified the lack of interoperability, insufficient network capacity and cross-border operations as the main obstacles to the development of rail freight. The opinion that corridors need to be established according to market needs, rather than according to political definitions, was also widely shared.

In parallel to the public consultation process, the Commission set up a strategic consultation group to investigate how to implement a dedicated freight network. The group included experts from member states, railway undertakings, infrastructure managers, freight forwarders, ports and

regulatory bodies. CER commented on the group's final report, highlighting that networks should remain open to all freight-relevant lines, and that railway undertakings should be involved in the corridor's governance at the same level as infrastructure managers. CER believes this is essential to ensure the market-orientated development of corridors.

Coordination of investments

To highlight the need for coordinated investment when establishing international corridors, CER organised a meeting in April 2008 of 35 European rail freight companies with representatives from the Slovenian EU presidency, European parliamentarians and the European Commission. The chief executives of CER freight operators consequently wrote personal letters to their national transport ministers inviting them to set up ministerial corridor conferences. Many ministers reacted positively, showing a keen interest in the CER approach.

By mid-2008 some national transport ministries were tending to evade the issue, saying that they would prefer to defer launching ministerial conferences on the corridors until the Commission has published its proposed regulation on rail freight corridors. Convinced that coordinated political action is required more than legislation to promote rail freight corridors, CER developed a *Corridor Tool Kit to further push the bottom-up approach*. The kit provides railways with a practical seven-step process to coordinate the establishment of ministerial conferences and corridor governance structures. The first training seminar based on the Corridor Tool Kit was successfully organised for CER members in November 2008.

'The CER Corridor Tool Kit is a valuable support tool for organising international corridor conferences.'

Jan Komárek

Czech Railway Infrastructure Administration (SŽDC) Director General and CER Vice-Chairman

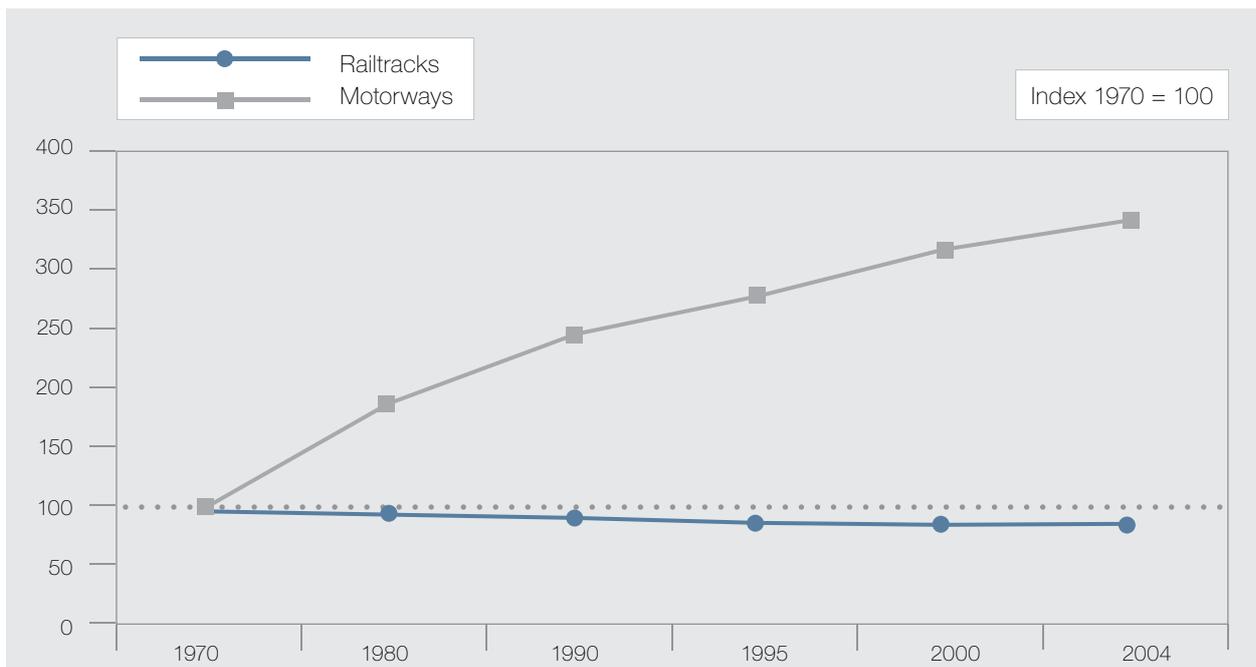
The need to mobilise activities around rail freight infrastructure development and strong international coordination of infrastructure capacity improvement for rail corridors were also highlighted at the *CER Eurailfreight conference* in January 2009. More than 250 high level representatives from European institutions, railway companies and customer organisations discussed the challenges of rail freight transport beyond liberalisation. Many speakers, including the Deputy Minister for Railway Transport in the Czech Republic's Ministry of Transport (representing the Czech EU presidency) pointed out that investment in rail is the basic requirement to boost the development of rail freight (see graph).

Parliament gets involved

The European Parliament adopted its own initiative report "Freight Transport in Europe" in September 2008. The report, which was drafted by Green MEP Michael Cramer, was very favourable towards railways. Following CER's input, the report demanded that the EU and its member states should promote the "polluters pay" principle for all modes of transport. It also stressed that the rail freight network should be based on the most market-relevant freight corridors.

Development of railway lines and motorways (in km)

Between 1970 and 2005, the length of motorways has increased 350% in the EU15 whereas the length of railway tracks has diminished by 14%. This also explains the dramatic reduction in rail freight's market share over the past 40 years.



Source: European Commission, *Energy and Transport in Figures*, 2008

Regulation on rail freight corridors

In December 2008 the Commission published its regulation proposal concerning a European rail network for competitive freight. The proposal contains very bureaucratic elements which could endanger the market success of rail freight corridors. Beside strict provisions for priority rules and capacity reserves for freight trains it foresees the creation of a one-stop shop for ordering train paths. It also proposes that corridors be governed through corridor structures that comprise of infrastructure managers and national governments but exclude the main users, railway undertakings.

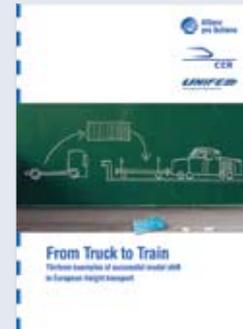
In an early response, CER sent a letter to the Commission and the European transport ministers to ensure that railway undertakings are fully involved in the implementation of European corridors. The letter was jointly signed by chief executives of more than 30 CER rail freight companies. Further activities were carried out by CER in the lead-up to the vote in the European Parliament. In April 2009, MEPs voted to reduce the bureaucratic hurdles of the proposed regulation. Unlike the Commission, the Parliament recognised the need for a flexible approach towards establishing rail freight corridors and demanded the inclusion of railway operators in the governance bodies.

There is great interest in how the debate will progress through the Council. CER will continue to voice its opinions and ideas in 2009 through its publications and media work as well as through personal meetings with key political actors.

Publication: From Truck to Train

Forecasts widely predict a growth in transport demand, raising the question of how a balance can be achieved between business needs and social and environmental responsibility. Worldwide, major economic regions rely on railways to transport their goods. This is not the case in Europe where, for decades, road networks have received a larger share of public investments. However, the opening of the European rail network to freight, the numerous measures for increased interoperability between Europe's railways, and the growing emphasis on the energy efficiency of rail transport show that change is possible.

The From Truck to Train brochure provides thirteen examples of successful shifts towards sustainable transport modes which contribute to the EU's environmental objectives. It is available for download at www.cer.be.



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Achieving an interoperable railway system

Interoperability is the key to achieving a single European railway market. Creating an integrated European railway area calls for improved technical compatibility of infrastructure, rolling stock, signalling and other rail systems. Less complex procedures are also required to approve rolling stock for use across the European rail network. The European Union has taken decisive steps during 2008 in cooperation with the European rail sector.

The Technical Package was finalised by the European Commission in July 2008. The package covers the new interoperability directive, a revision of the safety directive and amendments to the European Railway Agency (ERA) regulation. It was initiated after a formal request from CER and UNIFE in 2005, when both associations felt that there was a need to improve the interoperability of European railways. Political agreement was then quickly found among all stakeholders so that, despite the very technical nature of the subject, the entire package could be finalised in less than two years.

Impact of the Technical Package

The new directive introduces the principle of “cross-acceptance through mutual recognition.” Rolling stock which has been authorised for use in one member state must also be recognised in other states. Although national safety requirements would be harmonised some additional safety requirements are allowed in some cases. However, safety issues in general cannot be used as an excuse to hinder the approval of rolling stock. These are important steps that will promote the development of rail transport in Europe.

The new interoperability rules require the railways to move towards the harmonisation of systems and operations through the progressive adoption of Technical Specifications of Interoperability (TSI). The new directive consolidates and merges two older directives for high speed and for conventional rail. It aims to simplify the legislative framework and reduce administrative costs.

Mandatory certification of entities in charge of maintaining freight wagons is also required by the revised safety directive. Details of the certification process will be prepared by ERA in 2009. An example assessment will be created, providing a basis for potential extension to the other vehicle categories.

The amended ERA regulation requires the agency to play a coordinating role in efforts to streamline national safety rules. ERA will play a central role in the development of recommendations for cross-acceptance, certification and mutual recognition of rolling stock. Furthermore, the role of ERA as the authority for the European Rail Traffic Management System (ERTMS) is underlined.

Common vision on ERTMS

In July 2008 the European Commission and six organisations from Europe's railway sector, including CER, met in Rome to sign a Memorandum of Understanding (MoU) aimed at speeding the deployment of the European Rail Traffic Management System (ERTMS). ERTMS is a major industrial project to improve the competitiveness and safety of rail transport in the EU. It will further strengthen cooperation between the Commission and the railway sector and confirms the common ambition to accelerate ERTMS deployment across Europe. The new agreement follows a previous MoU, signed in March 2005, to study the viability of ERTMS deployment on the trans-European transport (TEN-T) network priority axes.

The new MoU aims to:

- Use a single technical baseline for all railway lines equipped with ERTMS in the European Union up to the end of 2012.
- Obtain manufacturer agreement to include software updates in new contracts at a client's request. Clients (rail companies and infrastructure managers) currently complain about the excessive costs imposed by manufacturers.
- Agree on a programme to enable a new version of the specifications to be drawn up by the end of 2012. A requirement is that trains equipped with the new version can run on lines equipped with the pre-2012 version.

- Improve and harmonise test procedures for checking the compatibility and compliance of equipment.
- Accelerate deployment of ERTMS, particularly by adopting a binding European plan and equipping new models of engine.

ERTMS needs cost-benefit approach

The new ETCS Baseline is addressed together with the European ERTMS deployment plan. The Commission published a working document on the EC decision amending the TSI on control-command and signalling in conventional rail during September 2008. After studying the document, CER submitted a position paper to the Commission in October. In the paper, CER states that the Commission must adopt a sound cost-benefit approach when dealing with ERTMS and consider the global competitiveness of the sector. The paper also reminds the Commission of the need for capacity investments in international corridors, better coordination of international freight train operations, better access to ports as well as the possibility of running longer and heavier trains. CER believes that addressing these needs will contribute to a substantial improvement in the competitiveness of rail freight transport. In this context, ERTMS should be seen as one element among others and be considered from an economical point of view.

CER also stated that the deployment of ERTMS should be based on the core ERTMS corridor network. CER has strongly supported this concept and promoted corridor conferences to bring together ministers of transport involved (see article page 11).

Interoperability and TSIs

The former two interoperability directives set out a number of essential requirements to be met for interoperability. These include safety, reliability and availability, health, environmental protection and technical compatibility along with others specific to certain sub-systems. The directives also require the production of mandatory Technical Specifications for Interoperability (TSIs) which define the technical standards

required to satisfy those essential requirements. Development of the TSIs is the responsibility of the ERA.

Already adopted in December 2007, the following TSIs were finally published by the European Commission in 2008:

- COMMISSION DECISION C(2007)6633 - Final. The technical specification of interoperability relating to “persons with reduced mobility” in the trans-European conventional and high speed rail system.
- COMMISSION DECISION C(2007)6450 - Final. The technical specification of interoperability relating to “safety in railway tunnels” in the trans-European conventional and high speed rail system.
- COMMISSION DECISION C(2007)6440 – Final. The technical specification for interoperability relating to the “infrastructure” sub-system of the trans-European high-speed rail system.

CER offers technical expertise

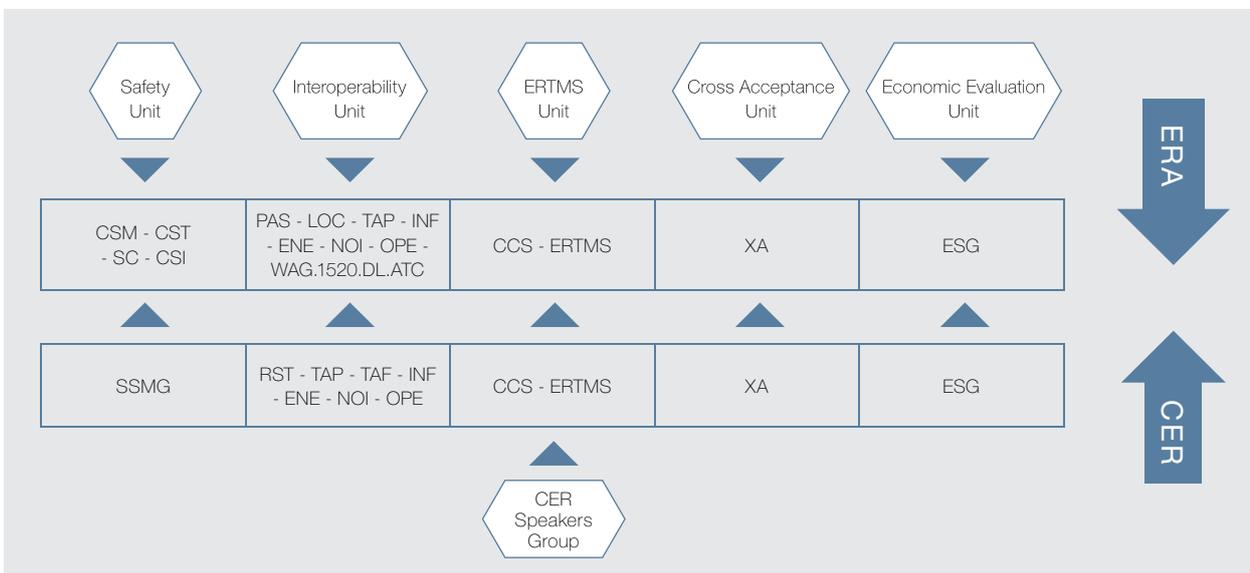
To provide its members’ expertise to the various ERA units on safety, interoperability, ERTMS, cross acceptance and economic evaluation, CER created 15 working groups before 2008 to mirror the proposed structure of ERA. Following the adoption of the Technical Package, a sixteenth working group on cross acceptance was established. The interaction of all groups was coordinated by the ERA speakers group, which meets quarterly at CER to ensure that important information is shared among all members (for details on working groups see graph below).

CER also provided two experts to help ERA to kick-off its activities on cross acceptance. In April 2008 the ERA cross-acceptance unit was launched. By the end of the year the unit had achieved its first success with the publication of a draft of annex VII to the new interoperability directive checklist.

The other CER working groups focused on defining the principal content, interoperability constituents, basic parameters and open points. They also produced position

Cooperation between CER and ERA

The ERA unit structure is mirrored by CER working groups (for acronyms see page 57)



papers for the following TSIs, of which the first was finalised and published by the ERA in early 2009:

- TSI Subsystem Infrastructure and Energy
- TSI Rolling Stock (traction units and passenger coaches)
- Certification of Maintenance Workshops.

In summer 2008 the European Commission also conducted a public consultation on the progress to develop an integrated, safe and interoperable European railway area. It aimed to assess stakeholder satisfaction with the current state of the interoperability legislation and its implementation. In response, CER produced a position paper which re-stated that EU railway legislation should always have the goal of increasing the competitiveness of rail and recognise that it is a particularly safe and environmentally friendly mode of transport. This would make it crucial that the benefit of EU legislation (including TSIs) must be proven by a profound cost-benefit analysis which also embraces implementation phases and not just the potential positive effects (like economies of scale) in the long-term.

The challenge of NRMM

Non-road mobile machinery (NRMM) contributes to emissions of air pollutants. Diesel engines in this type of equipment emit nitrogen oxides (NOx) and particulate matter. From 2012, emissions from these engines will be regulated before they are

placed on the market. The NRMM directive poses a number of challenges to the rail sector.

In 2008 the European Commission carried out an analysis of the impact of applying stage IIIB emission limits for diesel locomotives and railcars as of 2012 with the aim of revising the directive. The impact assessment was focused towards the possible economic, social and environmental effects of different policy options. Valuable information from CER members provided the data to assist in this assessment, delivering a true picture of the effects it would have on the industry from the rail perspective. While waiting for the results of the assessment, CER will continue to raise awareness on the implementation effects to the European Commission.



Signing the ERTMS MoU: Transport Commissioner Antonio Tajani, CER Deputy Executive Director Libor Lochman, CER Executive Director Johannes Ludewig and EIM Secretary General Michael Robson (from left to right)

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The flipside of European railway reform

Since 1991, the European Union took successive steps to opening up the rail market to competition. Member states transposed EU legislation and made impressive progress in railway reforms. In particular, the scope of reforms achieved by Central and Eastern European countries is impressive given the historical situation they come from and the shorter timeframe available. However, many rail and infrastructure companies remain chronically under-financed, contrary to clear EU requirements. To reverse the downward spiral of indebtedness, national authorities – scrutinised by the European Commission - must respect the existing EU legislation demanding adequate financing of railways.

EU legislation clearly shows that public authorities have a number of financial obligations towards railway undertakings and infrastructure managers operating on their territory. In turn, railways must improve performance by enhancing accountability, efficiency and client orientation among other things. However, without the strong commitment of governments and railway undertakings as well as infrastructure managers to establish a reliable and transparent relationship, only cosmetic railway reform can be achieved.

Infrastructure

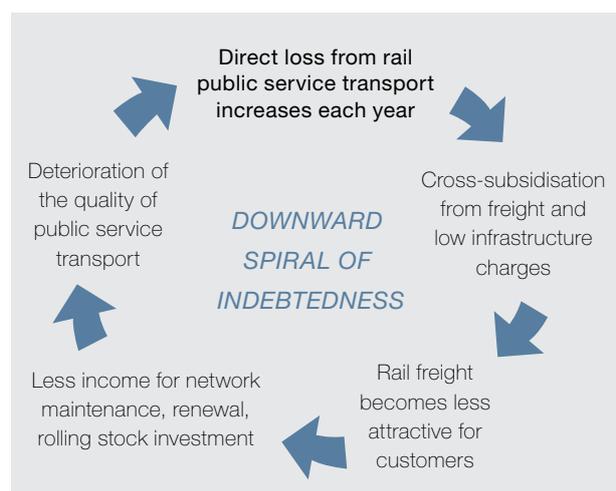
A well-maintained and safe rail infrastructure network provides the foundation for an efficient and effective rail transport system. The European Commission only recently observed that the maintenance of infrastructure does not always get the attention and finance required to enable railway operators to compete with other modes of transport. This observation implicitly acknowledges that member states are not complying with EC legislation. Comparison of rail infrastructure expenditure in the EU15 and the new EU12 reveals that very large discrepancies persist. Average running, renewal and new investment expenditure is much higher in the EU15 member states than in the new ones.

At the same time, track access charges in most Central and Eastern European (CEE) countries are relatively high, in particular for freight transport. While high track access charges reduce the need for State budget contributions, such charges further distort competitiveness. Road transport for example faces much lower charges for use of infrastructure.

CER advocates that state budget contributions for rail infrastructure maintenance and renewal are made in the form of Multi-Annual Contracts (MAC). This ensures reliable and transparent financing over a longer term (usually running

for four or more years). Constructive dialogue between the European Commission and CER has led to an agreement whereby monitoring of the contracts will be implemented through the Railway Market Monitoring System (RMMS). In addition, CER promotes the consideration of maintenance conditions in loans and grant agreements with the EU and international financing institutions to protect investments made in rail infrastructure. For example, by making evidence of sufficient maintenance financing a pre-condition to loan approval, financiers receive a reassurance that the assets they have funded will be maintained.

Within the framework of Eurovignette (see article page 27), CER has advocated that the internalisation of external costs for all modes of transport can generate additional revenue sources. CER believes that these resources should be earmarked for investments in sustainable modes of transport.



Public service

According to EU legislation (regulation 1191/69 and regulation 1370/2007), railway undertakings should operate as any commercial company on the market. To achieve this, railway undertakings must obviously be properly paid for the services they provide. A key issue of concern is the [under-compensation of public service transport obligations](#) that are imposed by public authorities.

The requirement for public authorities to compensate for the costs (including a reasonable profit) of providing public services is clearly stated in EC legislation.

The results of a CER member survey show that public service obligations met by railway operators in many EU member states and in particular the CEE countries are not adequately compensated, leading to unacceptable losses. Data collected by CER shows that for the period 2003 to 2008, [compensation covered only 57 to 75%](#) of the shortfall between expenses and the ticket revenue received by the companies examined. This left the railways with substantial losses each year. Expensive short-term debt financing frequently has to be used to cover these losses, further aggravating the debt burden of railway operators.

The provision of reliable and high-quality passenger services is intrinsically linked to substantial upfront capital investments in modern rolling stock. Although compensation for rolling stock investments can be allowed under EU legislation, only a few investments were possible because of under-compensation for public service obligations. Rolling stock fleets in CEE countries are mostly over 20 years of age, with several countries reporting that the age of half of their [fleet exceeds 30 years](#). While EU15 member states recently showed annual investments in rolling stock of €6.3 billion, new member states invested less than 25% of this amount (€1.4 billion annually).

In its dialogue with the Commission, CER has advocated that new financing instruments should be explored for rolling stock compliant with State aid limitations. Options to be considered may include public-private partnerships that combine EU grants with private financing, as well as the development of new rolling stock ownership structures, such as rolling stock pools and/or leasing. CER has also advocated the re-allocation of otherwise unused funds (for example, special EU funds such as instruments for pre-accession assistance) for rolling stock investments without putting those infrastructure investment funds at risk.

Historical debts

Historical debts are a problem for both railway undertakings and infrastructure managers. In the CEE countries, the debts have mostly been inherited from previous political structures and following difficult transition periods with no support at all for railways. Member states have [clear obligations to provide assistance to alleviate these debts](#) (as stated in a directive from 1991) in a way that does not impede sound financial management and improves the financial situation. However, to date, not much has been done in this regard.

The economic and financial crisis that started in mid-2008 has triggered requests from several new member states for debt restructuring assistance and balance of payment support.

Within this context, CER has requested that the Commission include railway debt reduction options in its discussions with international financing institutions and new member states.

Competitiveness of CEE railways

While the share of rail freight transport was much higher in the CEE countries than that of the EU in 2000 (44% versus 16%), it has been seriously declining during the last decade. Rail's share of the freight market had dropped to 30% by 2007 (see graph). [If this trend continues, rail's freight share would be 24% by 2010 and 16% \(the average EU15 level\) by 2015](#). While this shows a severe discrepancy with the 2001 White Paper target to keep rail share above 35% by 2010, it clearly demonstrates a serious problem in CEE countries. This problem is due to the severe lack of financing of railway undertakings and infrastructure companies in the region.

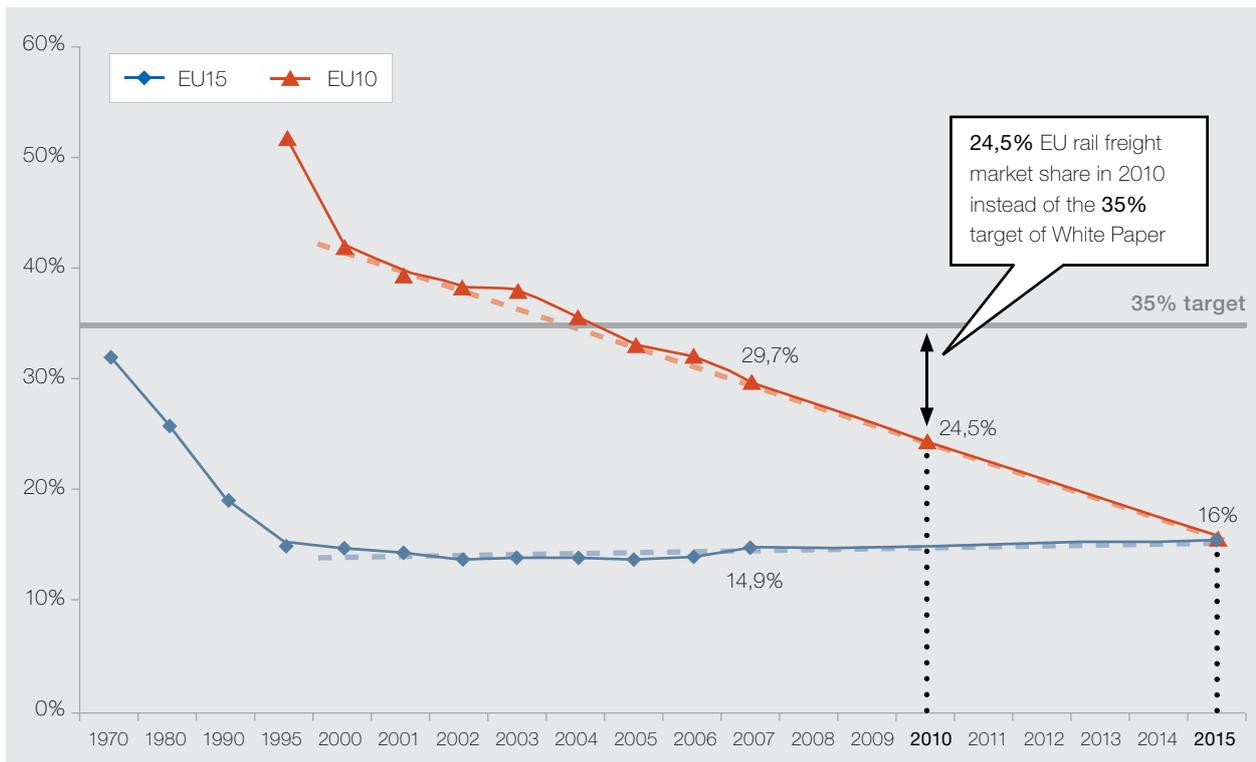
CER expects a range of factors to lead to a continued [deterioration of rail's competitive position against road](#) in CEE. State road investments, low wages and limited social and health protection will continue to keep road costs low. At the same time, the modest Eurovignette proposal may, at least in the foreseeable future, have little or no effect on road costs. Even if it is passed, new directives (such as those relating to telematic applications and noise reduction measures) may exert upward pressure on rail costs.

Investment and EU programmes must play a major role to reverse the move of freight from rail to road. Mindful of the modal split targets included in EU transport policy documents, CER has asked the Commission to reconsider transport investment programmes in order to close the gap between policy targets and the actual situation.

CER has organised several meetings for railway CEOs from Central and Eastern European and South-Eastern Europe with DG TREN Director General Matthias Ruete. All participants appreciated the constructive dialogue and underlined the importance of continuous cooperation to establish stable framework conditions for market openings. Matthias Ruete stressed that, despite the economic crisis, the Commission has not lost its ambition to develop a more sustainable transport system, and emphasised the key role railways have to fulfil this ambition.

Freight market share in EU member states

The Commission White Paper in 2001 set an objective of keeping the rail freight market share of new member states to 35%. However, the new member states rail freight market share has already fallen below this target.



Sources: ETIF 2007/2008, Eurostat, CER

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Putting passenger services on track

Two out of every three trains in Europe today are passenger services. To increase the attractiveness of passenger railway services - especially in competition with other modes of transport - fair regulatory and sound financial frameworks are needed. In anticipation of the opening of the market for international passenger services in 2010, CER has focused on implementing rail passenger rights and ensuring adequate compensation for public service obligations.

Three legal texts, adopted partly in the 2007 Third Railway Package, set the framework for CER's passenger activities over the past year. The regulations on rail passenger rights and public service obligations as well as the directive on market opening for cross-border railway services aim to:

- Increase the attractiveness of passenger railway services (by guaranteeing uniform and transparent passenger rights)
- Improve the financial situation of railways (through the requirement to conclude public service contracts for services ordered by government)
- Introduce cross-border competition (through market opening)

New rail passenger rights

Since the adoption of new rail passenger rights in 2007, CER has turned its attention from lobbying the European institutions to supporting its members' efforts to implement the regulation. Activities carried out included:

- Channelling feedback from the European institutions to member companies
- Conducting several surveys which provided useful peer-practice information
- Coordinating the relationship with European customer organisations.
- Developing TAP TSI as the leading railways representative together with ERA
- Organising a benchmarking study tour together with UIC for senior executives from passenger railways to Japan Railways East to offer firsthand observations of customer treatment practices in Japan
- Contributing to the development of new General Terms and Conditions of Carriage (GTC) under the International Conditions of Sale (CIV). An initial draft of the new GTC CIV/Passenger Rights Regulation (PRR) was unveiled in the first weeks of 2009

Competition needs interoperability

The aim of the Telematic Applications for Passengers (TAP) Technical Specifications of Interoperability (TSI) is to define a common info-communications standard for systems that provide passengers with information before and during the journey, reservation and payment systems, luggage management and the management of connections between trains and other modes of transport.

CER is the official representative of the railway sector in the development of the TAP TSI working in cooperation with the European Railway Agency (ERA), the entity responsible for the development. With the support of its members, CER worked throughout 2008 to draft, continuously review and evaluate the interoperability texts developed by ERA.

The final preliminary draft of the TAP TSI was announced in late February 2009. In this form the TAP TSI draft constitutes a good compromise to maintain the commercial freedom of railways, while creating the common technical platform for the provision of information to passengers and ticketing. CER will now focus on developing the strategic deployment plan for TAP TSI.

'2008 was an important year of preparation to implement the railway passenger rights regulation. Railways throughout Europe performed substantial progress in this respect. Now, they expect all modes of transport to be put on an equal footing in the future'

Guillaume Pepy
CEO of French Railways (SNCF)
and member of the CER Management Committee

Public services and market opening

In 2008 CER supported European lawmakers in adopting the regulation to reinforce the legislative requirements for the establishment of public service contracts between responsible authorities and railways, as this is an absolute pre-requisite to any opening of the public service passenger market. In parallel, CER continued to push for the implementation of the legislative requirement, existing since 1969, to conclude public service contracts necessary to reaffirm the financing of public service railway transportation (see article page 17). In the meantime, based on national initiatives, some member states decided to open their public service markets through employing public procurement tenders for the selection of their public service providers. This effectively resulted in the entry of several new passenger railway companies to the market.

CER will continue to advocate for adequately financed, multi-year public service contracts and to create the conditions for fair competition in this segment of the market. We strongly believe that these measures are required to enable the survival of a sustainable passenger rail public service in Europe.

92.76%

Proportion of passenger railway services performed as a public service in the new member states (compared with 60.79% in the EU15 countries).

CER position paper: Passenger rights

The CER position paper on the Commission's Passenger Rights Package (covering the rights of bus and coach as well as maritime passengers) argues for the creation of a level regulatory playing field to allow fair competition between the various modes of transport. To achieve this goal, CER sees the need to strengthen the provisions of the proposals covering delays, and the consequences of delays (compensation payments and in-kind assistance), as well as transparency on complaint handling and quality performance of operators. The European legislator should not compensate the deficiencies of one mode over another by establishing different rules for them in topics such as passenger rights.

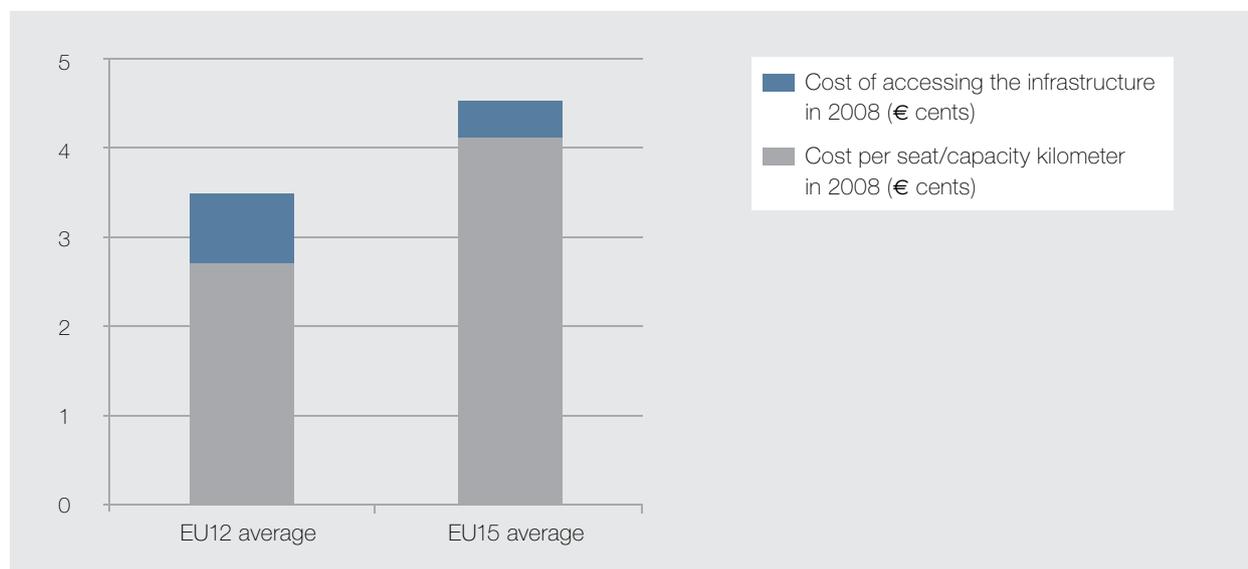
International passenger services

The directive liberalising the market for international passenger trains that cross borders between member states will come into force on 1 January 2010. CER supported the implementation of this new legal setup by participating in the development of new General Terms and Conditions (GTC) for the use of railway infrastructure, a task which will be completed in 2009.

Infrastructure and traffic related issues top the list of causes for delays of service. Establishing a performance regime for infrastructure managers is seen as key to elevating the quality of service provided by passenger trains. CER has also worked to increase financial outlays for rail infrastructure development through the various programmes of the European Union, and pointed out the need for increased investments by member states themselves.

Cost of a railway seat-kilometer in 2008

While passenger railways in new member states pay on average 50% more for accessing the infrastructure, their outlay to produce a seat-kilometer was 35% less than their Western counterparts', resulting in a severely curtailed ability to offer quality. Without a substantial increase to their budgets, new member states (EU12) will not be able to fulfill their obligations to grant the passenger rights requested under regulation 1371/2007.



Source: CER survey

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Seeking social dialogue

Railways directly employ more than 1.2 million people in Europe. Rail transport is not only about locomotives, wagons and infrastructure, but also about the people working within the sector. The human dimension of an integrated European rail transport market has always been very important to CER. Train drivers and conductors need to be adequately trained and staff productivity needs to be competitive. Both are essential prerequisites for a sustainable rail transport in Europe.

The creation of an integrated and competitive railway area in Europe calls for effective interoperability rules and common technical standards (see article page 14). These common standards must also include [minimum working conditions for staff in cross-border services](#) in order to overcome differences that might otherwise prevent or impede exchanges. This is why CER signed two important agreements in 2004 with the trade unions represented by the European Transport Workers' Federation (ETF). The first agreement relates to working conditions in cross-border services, while the second concerns a common license for European train drivers.

Working conditions

According to the CER-ETF agreement on working conditions of mobile staff in cross-border services (now directive 2005/47/EC), a daily rest away from home has to be followed by a daily rest at home. There is the possibility to include a second rest away from home through agreements between social partners at the national or company level.

This clause dates from a time when the rail freight market was not yet open. For many of the new longer routes it is sometimes necessary to use the same drivers and some of them will need [more than two rests away from home](#). The limit of two rests away from home may affect the competitiveness of railway undertakings and is not comparable to the freedom of movement seen in other transport sectors across the European economic area.

CER was asked to negotiate a limited extension of this clause, in return offering adequate compensation for the flexibility requested. The first appointment with the social partners on this issue took place in spring 2006. For more than three years, CER has tried to negotiate a change of this rule with the ETF without success. Regretfully the negotiations failed in early 2009 despite offers of expensive compensation in return for more flexibility on the number of rests.

Agreement on train driving licenses

The CER-ETF agreement on a European train driving license, signed in 2004, was replaced by directive 2007/59 on the [certification of train drivers](#) operating locomotives on the European railway system. The scope of the directive covers all train drivers (the agreement negotiated with ETF only related to cross-border services) but some provisions of the agreement are not covered by the directive. The social partners are currently examining issues that should be applied by railway undertakings in addition to the requirements of the directive.

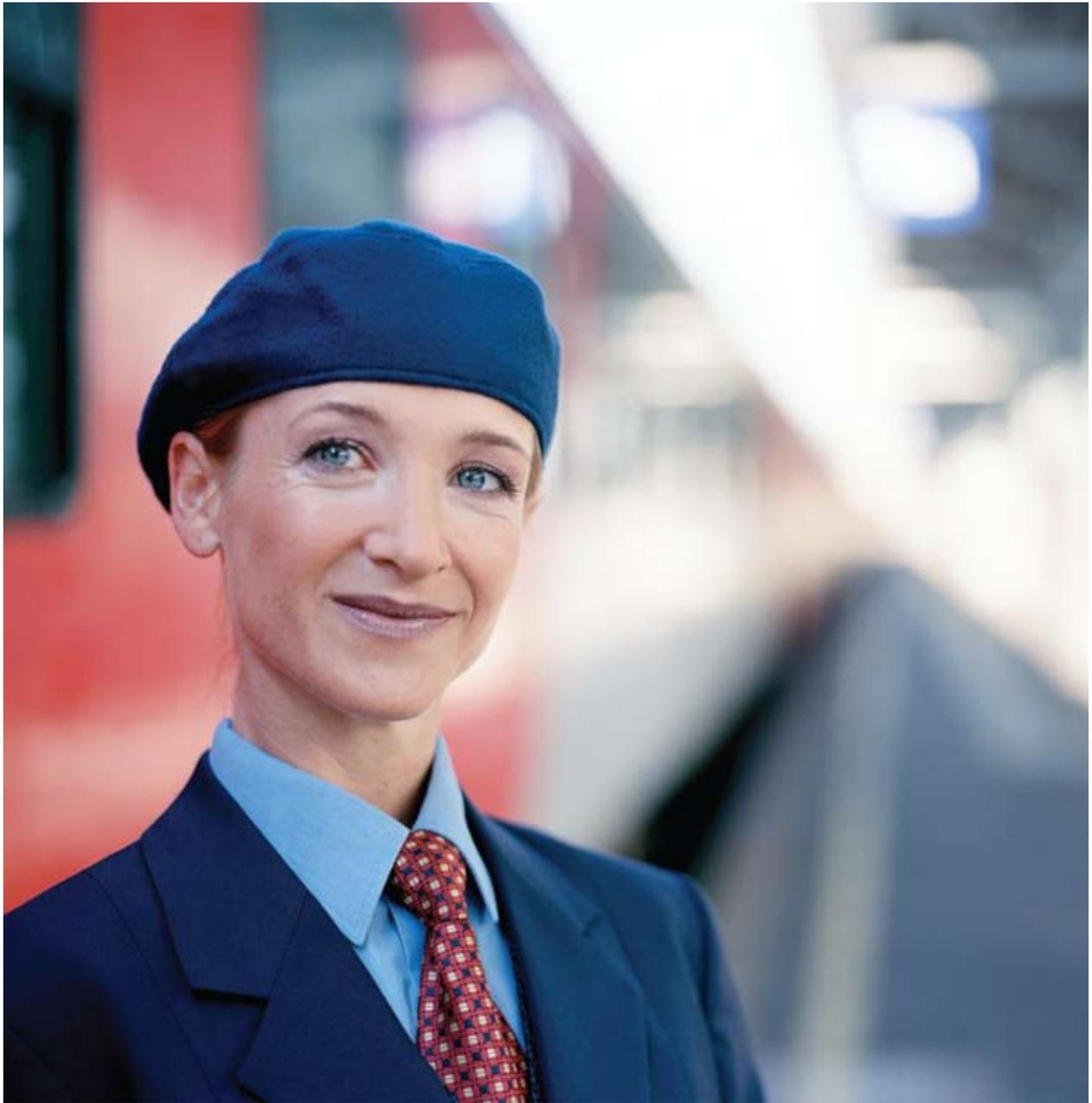
'In a more competitive market due to the challenge from road transport, we regret the decision of the trade unions not to retain the flexibility of organisations which are solely able to revitalise the railways and to establish new operators.'

Antoine Hurel
CEO of Veolia Cargo and CER Vice-Chairman,
active participant in the negotiations
between CER and ETF

Promoting European social dialogue

Employability is a strategic concept that aims to create a working environment which maintains and improves the qualifications and competences of workers while maintaining their health and fitness so they remain employable. Responsibility for employability is shared by the company, the employee, the work council and the trade unions.

In October 2008 the European social partners ETF, CER and EIM organised a high-level [conference on "Employability – a human resources strategy for shaping change in the railway sector"](#) in Potsdam, Germany. This conference was hosted by the German railways Deutsche Bahn, in the framework of the European Social Dialogue for the railway sector.



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Modern and safe customs procedures

An efficient customs process eases sustainable rail freight shipments into the European hinterland. It also considerably contributes to boosting the security of transports. CER has worked in partnership with the European Commission to develop and implement new customs procedures, and to identify to EU legislators the unique aspects of railways which best lend themselves to innovation.

CER's main customs and security objective is to bring together existing national regulations at European level. While the main text of the modernised customs code has been enacted, the implementation provisions must be finalised by the end of 2009 (for approval in 2010). This leaves important room for further efforts to align modernised practice with the unique features of railways.

Modernised transit procedure

Drafting of a new specification for a rail-specific customs transit procedure is well under way based on the existing New Customs Transit System (NCTS). This electronic system has to replace the simplified paper-based rail transit procedures that are in use today. NCTS-Rail will incorporate the requirements of the modernised customs code and other security-related legislation. CER will advocate the incorporation of the NCTS-Rail project's results into the implementing provisions of the modernised customs code.

Control of imports and exports

The use of the Import Control System (ICS) and phase 2 of the Export Control System (ECS) was originally planned to occur from 1 July 2009. This deadline has always been considered very ambitious, especially in light of the delays experienced in several member states in announcing their national frameworks. Subsequently, CER aimed to extend the deadline. This was finally achieved in early 2009, when the European Commission agreed to postpone the deadline by 18 months to the end of 2010.

Scanning of containers

Another important security aspect of rail freight relates to the scanning of all containers that are to be shipped across the Atlantic Ocean, a requirement demanded by the United States. With the cooperation of CER, good progress was made on establishing the protocol railways should use to fulfil this requirement without the risk of any major disruption to the flow of rail freight traffic.

Improved security

The contribution of CER, in collaboration with the rail safety organisation COLPOFER, and various other European security initiatives on behalf of railways have continued to improve the image of railways as a vital part of supply chains, particularly in respect to the security of shipments. Measures ranging from anti-terrorism activities to increasing traffic safety and the prevention of theft of precious metals along railways have continued to contribute to their competitiveness in 2008.

'The peculiarities of the railway sector are beginning to be recognised by the European Commission resulting in the gradual alignment of customs and security procedures with rail needs.'

Andrzej Wach
CEO of Polish Railways (PKP)
and CER Vice-Chairman





KLAIPEDA
LITOUWEN

ROTTERDAM

KÖLN

GENOA

MILANO

PADOVA

ROMA

BARI

BRINDISI

ISTANBUL

PATRA

CHAPTER 3

MAKING EUROPEAN TRANSPORT SUSTAINABLE

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Driving the market towards greener transport

Greening the transport sector is vital for the EU to meet the ambitious environmental targets it has set itself to reach by 2020. Transport is responsible for over a quarter of all CO₂ emissions and is the only sector where greenhouse gas emissions continue to rise. A shift from polluting road to greener rail transport based on fair competition is needed. In 2008 the Greening Transport Package marked an important landmark in the drive to internalise the external costs of road transport.

In its Greening Transport Package the European Commission put forward a number of initiatives to steer transport towards adopting sustainable business practices. Part of the package, published in July 2008, is a strategy to ensure that the price of transport better reflects its real cost to society. Environmental damage and congestion should gradually be reduced in a way that boosts the efficiency of transport and ultimately the economy as a whole. The package also contains a communication to reduce noise from rail freight and an inventory of existing EU measures on greening transport.

Make the polluter pay

The Commission's intention to apply the "polluter pays" principle to the road sector is the most important part of the package. The proposed revision of the Eurovignette directive on charges for heavy goods vehicles aims to unlock restrictions and finally allow member states to internalise the various elements of external costs into prices for the use of road infrastructure. Trucks are legally protected currently and therefore in a privileged competitive situation. For rail there is already provision to pay for its external costs through specific legislation and indirectly through participation in the European Emissions Trading Scheme (ETS). This distorts competition and slows down the much needed modal shift.

'Rail transport still lacks a level playing field with regard to other modes of transport. It is an important task for EU policy makers to tackle these distortions in order to promote sustainable transport in Europe.'

Hartmut Mehdorn

Chairman and CEO of DB, member of the CER Management Committee (until 30 April 2009)

The Commission's proposal identifies road freight transport as a key sector which requires economic and other regulations to address a range of issues including environmental damage. The most relevant elements of the proposed revision to the Eurovignette directive are:

- An enabling, non-mandatory framework, allowing (but not demanding) that member states levy an external cost charge on trucks through tolls.
- An extension of the trans-European transport networks (TEN-T) to enable charges on all roads. Member states may freely choose on which roads they apply the external cost charge.
- Internalisation of external costs is only allowed for air pollution, noise and congestion. CO₂ and accidents may not be included in the charging scheme, but accidents will be considered by the Commission in the next revision.
- External cost charges must be differentiated (varying according to vehicle, time and location of use) based on external costs.
- Revenues from external cost charges are to be earmarked for measures to promote sustainable transport, such as facilitating efficient pricing and developing alternative infrastructure for transport users.
- Charges for external costs can be calculated according to local circumstances but must follow a common methodology. Resulting values for each external cost category may not exceed the maximum values presented in an annex to the directive.

CER has long acknowledged that charging heavy goods vehicles for the external costs they impose on society and the environment would provide a major opportunity for a modal shift towards rail freight. While the Commission's proposal was welcomed as an important step in the right direction, it was also criticised for falling short of expectations. With climate change considered as the number one long-term challenge by the Commission and no other proven way of recovering the external cost of accidents, it seemed difficult to understand why CO₂ emissions and accidents were excluded from the proposal.



Commission President Barroso gives the green light to the railways at CER's 20th anniversary reception in May 2008 (see also chronology of CER events on page 48)

Study: Are trucks taking their toll?

The "Are trucks taking their toll?" study from the Dutch consultants CE Delft, published in 2008, shows that trucks cause far more environmental damage and congestion than previously thought. CO₂ emissions from European road freight are predicted to increase 54% by 2030. The report, published by the non-governmental organisation Transport & Environment (T&E), also found that lorries are responsible for 30% of road congestion in the EU, despite representing just 3% of road vehicles. Shocking data on the safety record of lorries has also been revealed. Per kilometre driven, trucks were found to be responsible for twice the number of deaths caused by passenger cars.

The study also debunks the road haulage industry's claim that trucks pay their full costs through existing taxes and charges. It found that existing charges of around €50 billion only cover infrastructure costs. External costs such as pollution, congestion, noise and accidents are not covered. In the debate on a revision of the Eurovignette directive, congestion charges for trucks have proved particularly controversial because they are seen as a small portion of the overall vehicle fleet. But the study's finding that trucks are responsible for 30% of congestion, suggests that tackling this relatively small number of vehicles would be an effective way of tackling the problem.

Key political players need to know

During the whole process of revising the Eurovignette directive, CER built and maintained close relations with all EU institutions. In February 2008 CER and chief executives of 35 rail freight companies met with representatives of the Slovenian EU presidency, the European Parliament, the Council and the European Commission and urged them to press for an ambitious revision of the Eurovignette directive.

When Jacques Barrot was replaced by Antonio Tajani as the Commissioner responsible for transport in May 2008, CER undertook specific actions to ensure the new Commissioner and his cabinet were aware of the need to level the playing field between road and rail. Meetings between Antonio Tajani and CER were held on several occasions. At the fringe of the Innotrans rail fair in Berlin in September 2008, CER arranged an ad-hoc meeting of more than 30 railway chief executives with the new Commissioner and his cabinet.

CER's close links to the highest levels in the European institutions also became clear in May 2008 when the conference "A market-based instrument approach to sustainable transport" was organised. The conference was held prior to CER's 20-year anniversary reception and became the first European transport association event ever attended by a Commission President. Addressing around 400 guests, including key players from all European institutions, José Manuel Barroso pointed out the role that railways could play as the most environmentally friendly mode of land transport. He pointed to rail's ability to tackle climate change and improve sustainability, particularly with regard to freight (see picture above).

During the year CER also encouraged and supported its members to influence the [Eurovignette debate at member state level](#). Chief executives were briefed with customised background papers and contacted their national ministries when discussions were about to take place in the Council. CER Executive Director Johannes Ludewig also met personally with a number of national transport ministers and gave presentations on the effects of introducing external cost charges in the specific country (see graph example).

‘Coordination and cooperation have become key elements of the rail sector’s public affairs campaign on the revision of the Eurovignette directive. It helped to communicate our commonly shared key messages in a very effective way.’

Michael Clausecker
UNIFE Director General

During the second half of 2008 CER maintained close liaison with the French EU presidency of the Council which clearly backed a revision of the Eurovignette directive. With support from the presidency, the rail sector addressed several leading MEPs as well as national and European officials in a [dinner event in Strasbourg](#).

Speaking at the event, Saïd El Khadraoui, the European Parliament’s rapporteur on the revision of the Eurovignette directive, welcomed the Commission’s initiative, including the proposal to earmark revenues to develop more sustainable

mobility. He expressed the view that this was a much needed first step to bring the road sector in line with other modes. Marc Papinutti, Director of Transport and Infrastructure at the French Ministry of Ecology, Sustainable Development and Land Planning, reconfirmed that the French EU presidency was aiming to achieve progress on the revision of the directive in order to make an agreement possible before the end of the legislative period in June 2009. Unfortunately this hope was shattered soon after by the emerging financial crisis.

The effect of the economic crisis

At the Council meeting in December 2008 member states only approved some general conclusions on the Greening Transport Package including the general strategy to internalise external costs of transport. In the debate on the revision of the Eurovignette directive, the main unresolved issues remain the [inclusion of congestion as a chargeable external cost and the earmarking of revenues](#). Given the current economic situation and the resistance of the road sector, governments appeared to be afraid of taking any measure that could result in negative public reactions, and preferred to just take time and postpone the entire process.

Despite a favourable first reading at the European Parliament in March 2009 and efforts to formulate a compromise text by the Czech EU presidency, widely differing views remain among member states. The Czech presidency finally decided to hand this dossier over to the Swedish government, which takes over the presidency in July 2009. CER has now focused on [building relations with the Swedish administration](#) to ensure that the aim of greening Europe’s transport will continue to stay at the top of the EU’s transport policy agenda in the second half of 2009.

The impact of external cost charges is minimal

The charge on the cost of tomatoes transported over 2,000 km would represent only 1.2% of transport cost and only 0.12% of the overall cost of production



Source: CER

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The giant problem of megatrucks

Pressure has been growing from the road haulage industry to allow the use of megatrucks for freight journeys anywhere in the EU. The European Commission is currently considering whether to allow giant trucks, up to 25.25 metres long and 60 tonnes in weight, across European borders. CER has warned that such megatrucks are incompatible with EU policy on co-modality, CO₂ reduction, combined transport and road safety, and should therefore be rejected.

Two years ago, the European Commission announced that it was considering revising directive 96/53 on the size and weight of trucks permitted to operate across the EU. Longer Heavier Vehicles (LHVs), also known as gicaliners and megatrucks, have been in use in Sweden and Finland for a number of years. These trucks are up to 25.25 metres long and 60 tonnes in weight. Current regulations limit trucks to 18.75 metres in length and 44 tonnes. Pressure has been rising from the road haulage industry to allow the use of LHVs in other countries and on journeys across the EU. Countries including the Netherlands and Denmark have been experimenting with their use. Others, among them Germany and the United Kingdom, have chosen to reject them after test trials.

A study going wrong

The debate remained mainly at the European Commission's working level until a study on the effects of a wider use of these vehicles was published in January 2009. Requested by the European Commission, it was carried out during 2008 by consultants Transport & Mobility Leuven (TML). The study claimed that allowing megatrucks to travel across Europe would be beneficial to Europe's citizens and the environment. It was heavily criticised by CER for understating many of the potential effects that they could have, including the negative effect on rail freight. Combined transport, which brings together the strengths of road and rail freight together, would be particularly vulnerable to competition from megatrucks.

Time to take action

Reacting to the European Commission study, CER asked the Fraunhofer Institute in Karlsruhe to carry out a separate study looking into the expected long-term effects of megatrucks on modal shift and CO₂ emissions. The Fraunhofer report paints a much grimmer picture. The Institute found strong evidence that the introduction of megatrucks would lead to negative impacts in the medium term that far outweighed any initial positive effects (see interview next page).

The report estimates that in the high-value goods and container transport markets, up to 30% of rail freight transport

could be shifted back onto the roads. The Institute warns that the slump in some parts of the combined freight transport market may be as high as 85%. The report concluded that longer and heavier road freight vehicles should be rejected, not least because of their effect on climate protection policy. The modal shift effects would run counter to the EU's CO₂ reduction targets with an additional 2 million tonnes of CO₂ produced each year if the LHVs were introduced.

CER strongly believes that allowing megatrucks on all European roads would be a negative move. It would inevitably produce a shift from rail back to road, both in terms of freight quantities and investment. Infrastructure investment would need to be focused on upgrading roads to cater for the new vehicles. It would also allow one particular transport mode to optimise its costs at the expense of society as a whole.

2 million tonnes

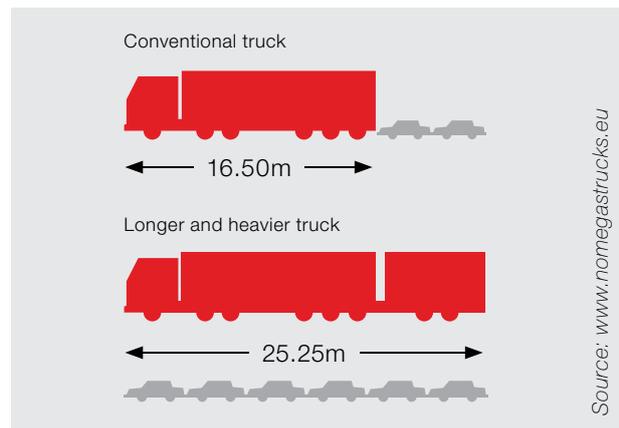
Additional amount of CO₂ per annum that is expected in Europe if megatrucks are introduced.

Widespread opposition

CER is not alone in opposing megatrucks. Around 150 organisations across Europe have stated their opposition, including more than 50 environmental groups, 22 road and rail traffic associations, and 18 trade unions. The reasons for their opposition vary. Safety is of particular concern for many road users as the severity of road accidents becomes worse with increasing vehicle weight (see graph). Transport workers are concerned about the effects on employment and the European Transport Workers' Union (ETF) fears for thousands of jobs in the rail freight industry if the widespread use of megatrucks is permitted.

Even Transport Commissioner Antonio Tajani recently rejected plans for the possible introduction of megatrucks in the near future. In an interview, published in March 2009, Tajani explained that it will be 2010 before a final decision on

introducing megatrucks will be taken at the European level. Tajani also believes that the idea of allowing cross border journeys by megatrucks in a few EU member states is neither compatible with current EU legislation nor desirable. The idea of bilateral agreements between member states on such a question contradicts the idea of the single market and raises also questions about a possible distortion of competition, the Commissioner said. Facing such widespread opposition, the European Commission services have recently accepted that the study by TML is flawed and are currently preparing a new study.



Interview: Professor Claus Doll, Fraunhofer Institute (ISI), Karlsruhe

Has the environmental impact of megatrucks been properly assessed before?

From the beginning of discussions in Europe, environmental impact has been a selling point for the concept of extra-long and extra-heavy vehicles. The assumptions are rather simple: per litre of fuel a megatruck can transport up to 20% more freight if it is fully loaded. But if it is not, the balance is negative. The TML study carried out for the European Commission did not take into account the long-term dynamic effects, nor did it look at logistics processes in detail.

What would the effect of introducing megatrucks be on emissions from road transport?

The effect consists of a number of aspects that would most likely develop in several phases. Shortly after their introduction, the improved efficiency of road cargo will reduce air pollutants and CO₂ emissions – supporters of megatrucks claim that two fully loaded megatrucks could transport the same amount of cargo as three normal trucks. But this only considers the short-term effects. In the medium term, the attractive loading conditions of megatrucks will cause a modal shift from rail to road. As rail on average is two to three times more energy efficient per ton of cargo than road, the overall balance of greenhouse gas emissions will become negative.

How would megatrucks affect the targets for the reduction of greenhouse gases that the EU has set?

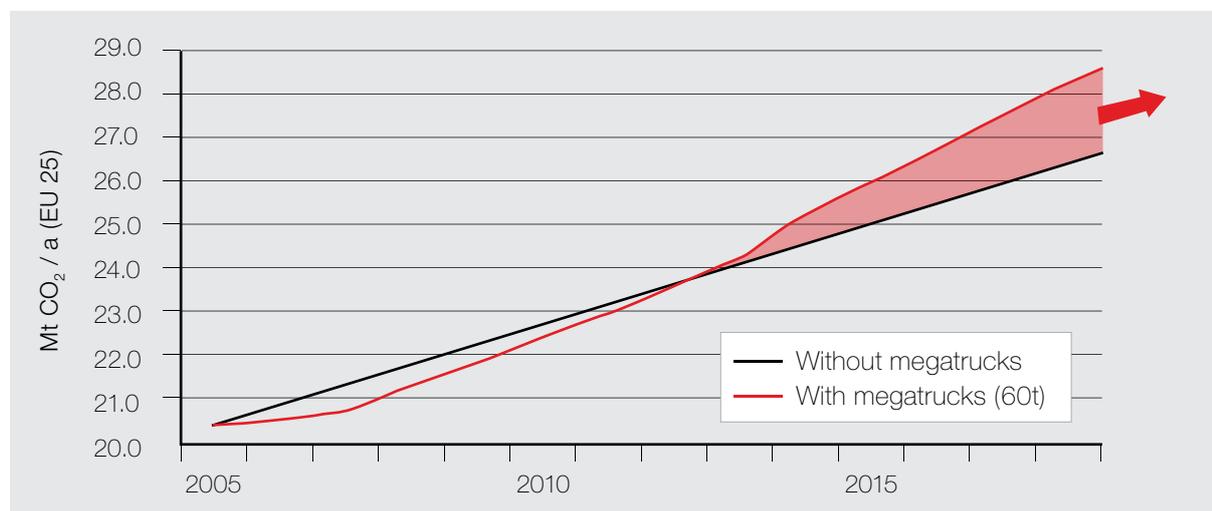
The uncertainty associated with the analysis is high, as in many markets we have only a vague idea of how logistics patterns may change due to the presence of longer and heavier lorries. Nonetheless, the results of our model simulations clearly reveal that the use of megatrucks across the EU must not be considered an instrument to achieve the EU's climate targets.

How would rail traffic be affected by their introduction?

The impact on the railways depends greatly on the market segment affected. Most vulnerable is combined transport, as megatrucks can carry three instead of two Twenty-foot Equivalent Unit (TEU) containers, thus making the handling of smaller shipments considerably easier. We expect megatrucks to replace up to 30% of combined transport volumes on rail. On longer distances, above 1,000 km, megatrucks will replace nearly all conventional 40 tonne trucks on the trans-European road network if their introduction is not regulated. But there is also strong evidence that bulk goods markets, such as agricultural products, will be affected too. While we estimate only five to ten percent of the rail bulk markets going over to megatrucks, given the high importance of this segment to the railways, this is a considerable shift of bulk goods from rail to road.

Negative environmental impact of megatrucks

CO₂ emissions will fall in the short term but then rise in the medium and long term



Source: Fraunhofer Institute 2008

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Rail's positive effect on climate change

As one of the most efficient and environmentally friendly ways to move people and goods, railways have a tremendous potential to reduce the environmental impact of transport and improve the quality of life of EU citizens. Until now, European policy has failed to properly address the impact of increasing transport demand, which is a major source of greenhouse gas emissions and a driver of global climate change. Throughout 2008 CER urged EU institutions to take action on cutting transport-related CO₂ emissions.

Today, reducing the environmental impact of virtually every activity forms a key part of modern European policy making. In early 2008 the proposal for a climate change package was described by Commission President José Manuel Barroso as "the most far-reaching legislative proposal to be made by the European Commission for many years."

In the proposal, the European Commission put forward a package of measures, including four directives, aimed at meeting the target of a 20% cut in greenhouse gas emissions by 2020 set by the EU heads of state in 2007. This package became law at the end of 2008. Attention is now shifting towards the UN climate summit in Copenhagen in December 2009, where the EU may raise its 20% target to 30% if other industrialised countries agree to do the same.

2020 targets need rail transport

In the battle to reduce greenhouse gas emissions, it is transport that clearly stands out as the biggest problem area. While emissions in other sectors have been falling across the EU since 1990, in transport they have risen significantly. Between 1990 and 2005, emissions from the transport sector increased by 26% in the EU27. By 2006 they represented 25% of total EU27 greenhouse gas emissions.

It is widely accepted that a modal shift towards railways can contribute to meeting EU targets on climate protection and reducing greenhouse gas emissions. A stronger role for rail will help to achieve real progress towards the 2020 target of a 20% cut in EU greenhouse gas emissions. However, concerted action must be taken by governments and policymakers to help bring this about.

While there are no specific targets for the transport sector, member states will be looking to cut emissions from transport in order to meet their own individual targets. Rail transport is already acknowledged as the most sustainable major transport mode because it has the lowest specific emissions (that is, emissions per passenger kilometre or freight tonne kilometre) of CO₂ compared to other transport modes. With

average loadings, travelling by rail is between three and ten times less CO₂ intensive than road or air transport.

During 2008 the European Parliament's Temporary Committee on Climate Change (CLIM) completed its work under the chairmanship of German MEP, Karl-Heinz Florenz. The final report, which Florenz and other MEPs discussed intensively with CER, outlines what parliamentarians consider are the priority future policy actions for countering climate change. It acknowledges the potential of rail transport as a low-carbon, energy-efficient mode of transport, both for long-distance freight haulage and for short- and medium-distance regional and commuter traffic. The report also states that the most efficient way of reducing transport-based emissions is to decrease transport growth as a whole by making public transport a more attractive alternative, increasing the volume of rail transport.

30%

Voluntary target of CER member companies to cut rail's specific CO₂ emissions by 2020.

Rail is doing its part

With the EU slowly developing concrete policy measures for its new 2020 climate change targets, CER continues to emphasise rail's natural advantages and its efforts to become more efficient. To help drive change and show commitment to the concept of reducing emissions, the CER General Assembly agreed in May 2008 to set a voluntary sector-wide target for cutting specific emissions from rail by 30% over the period 1990-2020. Progress towards the target is being helped by EU-funded projects such as Railenergy and TRAINER. Railenergy develops solutions ranging from the introduction of innovative traction technologies, components and layouts, to the development of rolling stock, operation and infrastructure management strategies. TRAINER is a project to teach train drivers energy-efficient driving techniques.

No alternative to greener transport

The Copenhagen climate summit is expected to give further impetus to measures aimed at reducing the environmental impact of transport. The Commission's Directorate General for Transport and Energy will issue a communication on the *future of transport 2050* in June 2009, which will be followed by a White Paper in 2010. The Directorate General for Environment is funding a study that looks at the changes needed to cut emissions from transport by 50% by 2050. A separate study for freight, called Freightvision, aims to create a vision for sustainable long-distance freight transport.

Given current political priorities, the imperative of developing and reorganising existing transport systems into modern, energy-efficient and environment-friendly forms is an environmental necessity that will only continue to intensify. There is clear potential for the rail sector to experience a revival in its fortunes by helping to meeting this challenge. The shift to a lower carbon world offers obvious opportunities, and the sector now needs to ensure that it makes the most of this opportunity.

Publications: Transport and the Environment

CER has published a broad range of publications on railways and the environment throughout the year. In addition to position papers and fact sheets on specific topics, such as the climate change package or the pesticides directive, a book and two brochures have been published which provide a comprehensive overview of the rail industry:

Rail Transport and the Environment: Meeting the Challenge

In this 200-page book, 15 transport and environment specialists take an in-depth look at how rail transport can help in the shift towards a cleaner transport future.

Rail Transport and Environment: Facts & Figures

The statistical and factual evidence behind the environmental strength of rail is laid out in this pocket-sized booklet that covers a range of areas including climate change, energy efficiency, land use, air pollution, noise, and external costs.

Railways and the Environment: Building on the Railways' Environmental Strengths

As one of the most efficient and environmentally friendly ways to move people and goods, this new publication, issued in January 2009, outlines the tremendous potential of railways to reduce the environmental impact of transport and improve the quality of life of EU citizens.

The brochures are available for download at www.cer.be.

The book can be ordered online from the publisher at www.landorbooks.co.uk.



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Good practice in multimodal transport

The greater use of combined transport allows each mode of transport to use its strengths, and allows road and rail to complement rather than to compete with each other. Combined transport is sustainable in both an environmental and economic sense. French supermarket chain Monoprix demonstrates the good practice of using combined transport.

Monoprix, a pioneering company, began considering fair trade initiatives in 1990 before making sustainable development a cornerstone of its strategy. This is now an integral part of its brand identity and personality.

Since 2000, the Monoprix Group has been considering its logistics and transport options and their impact on the environment. In cooperation with its partners and local and public authorities, Monoprix is exploring all possible alternatives to enable it to optimise its flow of goods and to use cleaner forms of transport.

One ambitious project that was launched in 2004 by Monoprix and its partners culminated in 2007 and 2008 with the supply of its Paris stores by rail – an innovation with concern for the environment and the inhabitants of Paris at its core.

Reducing congestion in Paris

This marks an end to 12,000 trucks entering Paris each year thanks to supply by rail to 80 Monoprix, Monop' and Beauty Monop' stores in the capital. 120,000 tonnes of goods (non-alcoholic drinks, textiles, beauty, leisure and household products), equating to 210,000 palettes, are involved. This corresponds to 30% of the total volume of goods transported into the capital by the Group. In addition to the reduction in CO₂ emissions and local pollutants (NOx, CO, VOC and particulates), this new system enables concrete and effective solutions to be applied to the issues of congestion and noise pollution, the effects of which are felt increasingly by city dwellers, while guaranteeing the quality of service that the stores and customers expect from the company.

12,000

Number of truck trips saved into Paris per year by the Monoprix combined transport scheme.

The project was launched in 2004 when Monoprix agreed to experiment with transporting goods by rail at the request of the Regional Public Works Directorate for Ile-de-France. A

feasibility study followed in 2005 undertaken on behalf of the partners of the project: the Paris City Hall, the Ile-de-France region, the French Railway Network, the Regional Public Works Directorate for Ile-de-France and Monoprix. In 2006, Monoprix signed a "Charter of Good Practice for Transport and Goods delivery in Paris" and chose Fret SNCF as its rail operator.

Developing infrastructure

From Monday to Friday, a rail shuttle service now runs on line D of the RER (Regional Express Network) to transport goods stocked in the Combs-la-Ville and Lieusaint (Seine-et-Marne) warehouses, operated by Samada, a logistics subsidiary of the Group, to the Gabriel Lamé depot at Bercy station. In this vast 3,700 m² area, which was specially developed for Monoprix, the goods are unloaded, sorted by store location and then reloaded onto 26 lorries which run on natural gas; this is the first private fleet of NGV delivery vehicles. Equipped with noise reduction equipment, they travel the final kilometres within Paris.

In October 2008, Monoprix joined together with the SNCF, GNVert, a subsidiary of the GDF SUEZ Group, and Paris City Hall, to inaugurate the first NGV service station designed for urban goods vehicles in Paris. Situated in the 12th arrondissement, near to Bercy station, it provides fuel to the first private fleet of NGVs in service in the retail supply sector; the fleet's 26 lorries deliver to Monoprix's stores in Paris.

After the development of a river transport system for bulk import goods and the operation of Haute Qualité Environnementale (HQE® – High Quality Environmental standard) warehouses in Combs-la-Ville and Marly-la-Ville, the use of trains represents a major step forward in the implementation of a supply chain that shows greater respect for the environment. It demonstrates Monoprix's desire to be an active and inventive retailer and a pioneer in sustainable development issues.





MÜNCHEN

ZÜRICH

BERN

GENÈVE

LYON

MONTPELLIER

MARSEILLE

CHAPTER 4

CER IN 2008

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How does CER work?

CER is the only organisation in the EU representing the entire European railway system. Its diverse membership includes railway operators and infrastructure managers across Europe. CER represents private operators and state-owned railways irrespective of their size, structure, or main business area. CER currently has 72 members.

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

CER General Assembly

The General Assembly is the decision-making body of CER. All member companies take one seat and are represented by their chief executive or director general. The assembly gives the CER team guidance by taking decisions on how to advance on specific policy dossiers.

CER Management Committee

The Management Committee prepares the decisions of the General Assembly. It consists of the CER Chairman, three Vice-Chairmen and further members elected by the General Assembly. The size of the Management Committee is limited to a maximum of 14 members.

CER Assistants

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

Beside these internal bodies, CER also establishes further meetings and working groups to discuss specific issues. Affected members are invited to take part in these discussions.

High Level Meetings

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

Working Groups

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

- Customs Group
- Directors of Communications Group (DCG)
- Environment Support Group
- ERA Steering Unit (and various working groups on interoperability and safety, see also chart on page 15)
- Freight Focus Group (FFG)
- Human Resources Directors (HRD)
- Infrastructure Interest Group (IIG)
- Passenger Working Group (PWG)

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

Building bridges

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

CER is always open to new members.

72 member railway and infrastructure companies (as of 1 May 2009)

COUNTRY	Logo	Name <i>English Name</i>	Abbreviation	CER General Assembly Representative	Website
ALBANIA		Hekurudha Shqiptare <i>Albanian Railways</i>	HSH	Zamir RAMADANI	www.hsh.com.al
AUSTRIA		Österreichische Bundesbahnen <i>Austrian Federal Railways</i>	ÖBB	Peter KLUGAR	www.oebb.at
AUSTRIA		Salzburger Lokalbahn <i>Salzburg Regional Railway</i>	SLB	Gunter MACKINGER	www.slb.at
AUSTRIA		Wiener Lokalbahnen Cargo <i>WLB Cargo</i>	WLB Cargo	Gerald RETSCHER	www.wlb.at/cargo-home.html
BELGIUM		Société Nationale des Chemins de Fer Belges /Nationale Maatschappij der Belgische Spoorwegen <i>Belgian National Railways</i>	SNCB/NMBS	Marc DESCHEEMAECKER	www.b-rail.be
BELGIUM		SNCB/NMBS Holding <i>Belgian National Railways Holding</i>	SNCB/NMBS Holding	Jannie HAEK	www.sncb.be www.nmbs.be
BELGIUM		Thalys International <i>Thalys International</i>	Thalys	Olivier POITRENAUD	www.thalys.com
BOSNIA-HERZEGOVINA		Željeznice Federacije Bosne i Hercegovine <i>Railways of the Federation of Bosnia-Herzegovina</i>	ŽFBH	Narcis DŽUMHUR	www.zfbh.ba
BOSNIA-HERZEGOVINA		Željeznice Republike Srpske <i>Railways of the Republic of Srpska</i>	ŽRS	Ljubo PAŠALIĆ	www.zrs-rs.com
BULGARIA		Balgarski Daržavni Železnitsi <i>Bulgarian State Railways</i>	BDŽ	Hristo MONOV	www.bdz.bg
BULGARIA		Bulgarian Railway Company <i>Bulgarian Railway Company</i>	BRC	Vladimir DUNCHEV	www.brc-bg.com
BULGARIA		Bulmarket <i>Bulmarket</i>	Bulmarket	Stanko Dobrev STANKOV	www.bulmarket.bg
BULGARIA		Nacionalna Kompania Železopatna Infrastruktura <i>Bulgarian National Railway Infrastructure Company</i>	NRIC	Anton GINEV	www.rail-infra.bg
CROATIA		Hrvatske Željeznice <i>Croatian Railway Company</i>	HŽ	Zoran POPOVAC	www.hznet.hr
CZECH REPUBLIC		České Dráhy <i>Czech Railways</i>	ČD	Petr ŽALUDA	www.ceskedrahy.cz
CZECH REPUBLIC		Správa Železniční Dopravní Cesty <i>Czech Railway Infrastructure Administration</i>	SŽDC	Jan KOMÁREK	www.szdc.cz
DENMARK		Danske Statsbaner <i>Danish State Railways</i>	DSB	Søren ERIKSEN	www.dsb.dk
DENMARK		DB Schenker Rail Danmark <i>DB Schenker Rail Denmark</i>	DB Schenker (DK)	Stig KYSTER-HANSEN	www.rail.dbschenker.dk

COUNTRY	Logo	Name <i>English Name</i>	Abbreviation	CER General Assembly Representative	Website
ESTONIA		Eesti Raudtee <i>Estonian Railways</i>	EVR	Kaido SIMMERMANN	www.evr.ee
FINLAND		VR-Yhtymä Oy <i>VR-Group- Finnish Railways</i>	VR	Pertti SAARELA	www.vr.fi
FRANCE		Société Nationale des Chemins de Fer Français <i>French National Railway Company</i>	SNCF	Guillaume PEPY	www.sncf.fr
FRANCE		Veolia Transport <i>Veolia Transport</i>	Veolia Transport	Antoine HUREL	www.veolia- transport.com
GERMANY		Deutsche Bahn <i>German Railway Group</i>	DB	Rüdiger GRUBE	www.deutschebahn. com
GERMANY		TX Logistik <i>TX Logistik</i>	TX Logistik	Karl MOHNSSEN	www.txlogistik.de
GREAT BRITAIN		Angel Trains International <i>Angel Trains International</i>	Angel Trains	Timothy JACKSON	www.angeltrains. com
GREAT BRITAIN		Association of Train Operating Companies <i>Association of Train Operating Companies</i>	ATOC	Roger COBBE	www.atoc.org
GREAT BRITAIN		DB Schenker Rail UK <i>DB Schenker Rail UK</i>	DB Schenker (UK)	Keith HELLER	www.rail. dbschenker.co.uk
GREAT BRITAIN		Eurostar (UK) <i>Eurostar (UK)</i>	Eurostar	Richard BROWN	www.eurostar.com
GREECE		Organismo Siderodromôn Elladas <i>Hellenic Railways Organisation</i>	OSE	Georgios YANNOUSSIS	www.ose.gr
GREECE		TRAINOSE <i>TRAINOSE - Greek National Passenger Train Operating Company</i>	TRAINOSE	Stavros KALOGIANNIS	www.ose.gr
HUNGARY		Central-European Railway <i>CER Central European RailwayTransport, Trading and Service Company</i>	CER	István BÁRÁNY	www.cer.hu
HUNGARY		Magyar Vasúti Fuvarozói Egyesülés <i>Hungarian Railway Association</i>	HUNGRAIL	János BERÉNYI	www.hungrail.hu
HUNGARY		Magyar Államvasutak <i>Hungarian State Railways</i>	MÁV	István HEINCZINGER	www.mav.hu
HUNGARY		MÁV CARGO <i>MÁV CARGO - Hungarian Rail Freight Company</i>	MÁV Cargo	László ÁTAL	www.mavcargo.hu
HUNGARY		MÁV-START <i>MÁV-START - Hungarian Rail Passenger Company</i>	MÁV-START	Tamás KOZÁK	www.mav-start.hu
HUNGARY		Vasúti Pályakapacitás-Elosztó <i>Hungarian Railway Capacity Allocator</i>	VPE	István PÁKOZDI	www.vpe.hu
HUNGARY/ AUSTRIA		Győr-Sopron-Ebenfurth Vasút/Raab- Oedenburg-Ebenfurter Eisenbahn <i>Győr-Sopron-Ebenfurth Railway Company</i>	Gysev/ RoEE	Csaba SZÉKELY	www.gysev.hu

COUNTRY	Logo	Name <i>English Name</i>	Abbreviation	CER General Assembly Representative	Website
IRELAND		Iarnród Éireann <i>Irish Rail</i>	IÉ	Richard FEARN	www.irishrail.ie
ITALY		Ferrovie dello Stato <i>Italian Railway Group</i>	FS	Mauro MORETTI	www.ferroviodellostato.it
LATVIA		Baltijas Ekspresis <i>Baltic Rail Freight Company</i>	BE	Janis BLAZE	www.asbe.lv
LATVIA		Latvijas Dzelzceļš <i>Latvian Railways</i>	LDz	Uģis MAGONIS	www.ldz.lv
LITHUANIA		Lietuvos Geležinkeliai <i>Lithuanian Railways</i>	LG	Stasys DAILYDKA	www.litrail.lt
LUXEMBOURG		Société Nationale des Chemins de Fer Luxembourgeois <i>Luxembourg National Railway Company</i>	CFL	Alex KREMER	www.cfl.lu
LUXEMBOURG		CFL Cargo <i>Luxembourg Cargo Company</i>	CFL Cargo	Fernand RIPPINGER	www.cflcargo.eu
MACEDONIA		Makedonski Železnici Infrastructure <i>Railways of the Former Yugoslav Republic of Macedonia Infrastructure</i>	RFYMI	Besir DEARI	www.mz.com.mk
MACEDONIA		Makedonski Železnici Transport <i>Railways of the Former Yugoslav Republic of Macedonia Transport</i>	RFYMT	Blagoja KRSTEVSKI	www.mz.com.mk
MONTENEGRO		Željeznice Crne Gore <i>Railways of Montenegro</i>	ŽCG	Savo PARAČA	www.zeljeznica.cg.yu
NETHERLANDS		Nederlandse Spoorwegen <i>Dutch Railways</i>	NS	Bert MEERSTADT	www.ns.nl
NETHERLANDS		DB Schenker Rail Nederland <i>DB Schenker Rail Nederland</i>	DB Schenker (NL)	Detlef HEYDT	www.dbschenker.nl
NORWAY		Norges Statsbaner <i>Norwegian State Railways</i>	NSB	Einar ENGER	www.nsb.no
POLAND		CTL Logistics <i>CTL Logistics</i>	CTL	Krzysztof NIEMIEC	www.ctl.pl
POLAND		Polskie Koleje Państwowe <i>Polish State Railways</i>	PKP	Andrzej WACH	www.pkp.pl
POLAND		Rail Polska <i>Rail Poland</i>	Rail Polska	Timothy HOLLOWAY	www.railpolska.pl
PORTUGAL		Caminhos de Ferro Portugueses <i>Portuguese Railway Company</i>	CP	Francisco José CARDOSO DOS REIS	www.cp.pt
ROMANIA		Compania Națională de Cai Ferate <i>Romanian National Infrastructure Company</i>	CFR	Viorel SCURTU	www.cfr.ro
ROMANIA		Societatea Națională de Transport Feroviar de Călători <i>Romanian National Passenger Train Operating Company</i>	CFR Călători	Răzvan Laurențiu STOICA	www.cfr.ro/calatori

COUNTRY	Logo	Name <i>English Name</i>	Abbreviation	CER General Assembly Representative	Website
ROMANIA		Societatea Națională de Transport Feroviar de Marfă <i>Romanian National Freight Operating Train Company</i>	CFR Marfă	Grațian CĂLIN	www.cfrmarfa.ro
ROMANIA		Grup Feroviar Roman <i>Romanian Railway Group</i>	GFR	Sorin CHINDE	www.gfr.ro
ROMANIA		RegioTrans Brasov <i>Romanian Transport Brasov</i>	RegioTrans Brasov	Costel COMANA	www.regiotrans.ro
ROMANIA		Servtrans Invest <i>Servtrans Invest</i>	Servtrans Invest	George BURUIANĂ	www.servtrans-invest.com
SERBIA		Železnice Srbije <i>Serbian Railways</i>	ŽS	Milovan MARKOVIĆ	www.serbianrailways.com
SLOVAKIA		Bratislavská Regionálna Koľajová Spoločnosť, a.s. <i>Bratislava Regional Railway Company</i>	BRKS	Roman FILISTEIN	www.brks.sk
SLOVAKIA		Železnice Slovenskej Republiky <i>Slovak Infrastructure Company</i>	ŽSR	Štefan HLINKA	www.zsr.sk
SLOVAKIA		Železničná Spoločnosť Slovensko <i>Slovak Rail Passenger Operator</i>	ZSSK	Milan CHÚPEK	www.slovakrail.sk
SLOVAKIA		Železničná Spoločnosť Cargo Slovakia <i>Slovak Rail Freight Company</i>	ZSSK Cargo	Matej AUGUSTÍN	www.zscargo.sk
SLOVENIA		Slovenske Železnice <i>Slovenian Railways</i>	SŽ	Matic TASIČ	www.slo-zeleznice.si
SPAIN		Administrador de Infraestructuras Ferroviarias <i>Spanish Railway infrastructure Manager</i>	ADIF	Antonio GONZÁLEZ MARÍN	www.adif.es
SPAIN		RENFE Operadora <i>National Spanish Railway Operator</i>	RENFE Operadora	José SALGUEIRO CARMONA	www.renfe.es
SWEDEN		Sveriges Branschföreningen Tågoperatörerna <i>Association of Swedish Train Operators</i>	ASTOC	Jan SUNDLING	www.tagoperatörerna.se
SWITZERLAND		BLS Lötschbergbahn <i>Lötschberg Railway Company</i>	BLS	Bernard GUILLELMON	www.bls.ch
SWITZERLAND		Schweizerische Bundesbahnen/Chemins de Fer Fédéraux Suisses/Ferrovie Federali Svizzere <i>Swiss Federal Railways</i>	SBB/CFE/FFS	Andreas MEYER	www.sbb.ch
TURKEY		Türkiye Cumhuriyeti Devlet Demiryolları <i>Turkish State Railway</i>	TCDD	Süleyman KARAMAN	www.tcdd.gov.tr

Partners (as of May 2009)

GEORGIA		Saqtartvelos Rkinigza <i>Georgian Railway</i>	GR	Irakli EZUGBAYA	www.railway.ge
JAPAN		East Japan Railway Company <i>East Japan Railway Company</i>	JR East	Yoshio ISHIDA	www.jreast.co.jp

CER governance

CER Chairman & Management Committee



Mauro MORETTI
FS, Ferrovie dello Stato
CER Chairman as of January 2009
CER Vice-Chairman during 2008



Aad VEENMAN
NS, Nederlandse Spoorwegen
CER Chairman until December 2008



Antoine HUREL
Veolia, Veolia Transport
CER Vice-Chairman



Peter KLUGAR
ÖBB, Österreichische Bundesbahnen
Board Member as of January 2009



Jan KOMÁREK
SŽDC, Správa Železniční Dopravní Cesty
CER Vice-Chairman as of May 2008



Francisco José CARDOSO DOS REIS
CP, Caminhos de Ferro Portugueses
Associated Member



Andrzej WACH
PKP, Polskie Koleje Państwowe
CER Vice-Chairman as of January 2009
Board Member during 2008



Martin HUBER
ÖBB, Österreichische Bundesbahnen
Board Member until May 2008



Roger COBBE
ATOC, Association of Train Operating Companies
Board Member



Anne-Marie IDRAC
SNCF, Société Nationale des Chemins de Fer Français
Board Member until May 2008



István HEINCZINGER
MÁV, Magyar Államvasutak
Board Member



Dalibor ZELENÝ
ŽSR, Železnice Slovenskej Republiky
CER Vice-Chairman until May 2008



Jan SUNDLING
ASTOC, Branschföreningen Tågoperatörerna
Board Member



Constantin MANEA
CFR, Compania Natională de Cai Ferate
Board Member until January 2009



Jannie HAEK
SNCB /NMBS Holding
Board Member



Tomaž SCHARA
SŽ, Slovenske Železnice
Board Member until March 2009



Guillaume PEPY
SNCF, Société Nationale des Chemins de Fer Français
Board Member as of May 2008

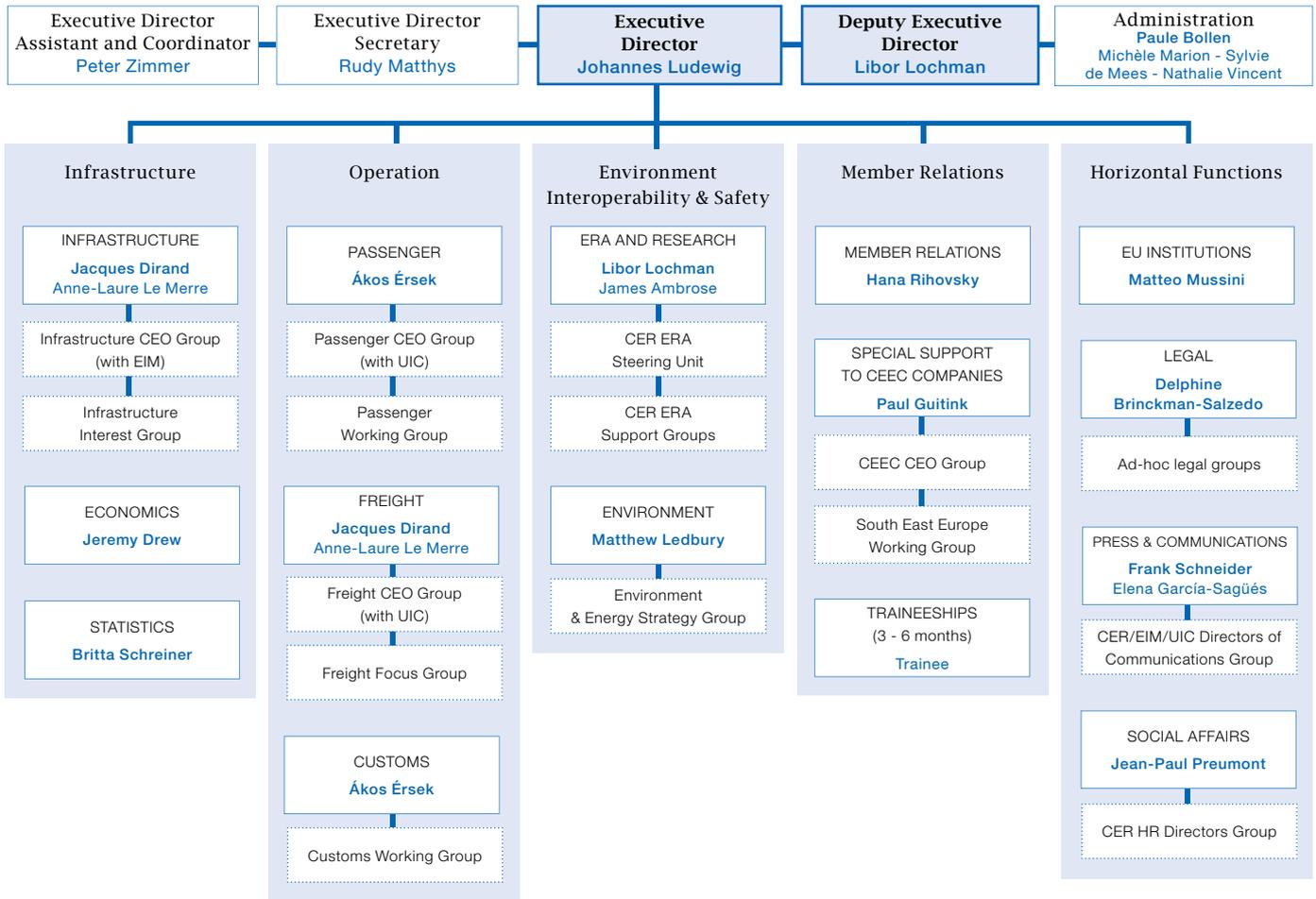


Hartmut MEHDORN
DB, Deutsche Bahn
Board Member until April 2009



Andreas MEYER
SBB/CFF/FFS, Schweizerische Bundesbahnen/Chemins de Fer Fédéraux Suisses/Ferrovie Federali Svizzere
Board Member as of May 2008

CER working structure



CER team



Front row: Raffaella De Marte, Sylvie De Mees, Johannes Ludewig, Nathalie Vincent, Elena García Sagüés, Libor Lochman.
Second row: Britta Schreiner, Delphine Brinckman-Salzedo, Paule Bollen, Michèle Marion, Ákos Érsek, Jean-Paul Preumont.
Third row: Rudy Matthys, James Ambrose, Paul Guitink, Frank Schneider, Jeremy Drew.
Back row: Jos van Weyenberghe, Hana Rihovsky, Anne-Laure Le Merre, Jacques Dirand, Matthew Ledbury, Peter Zimmer.
(Missing on the picture: Matteo Mussini and Philippe de Smeyter)

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List of CER publications

In 2008, CER produced various kinds of publications on a regular basis, including seven (multilingual) brochures, one booklet, seven position papers and numerous fact sheets on European rail policy issues. In addition, two books, two essays and several studies provided readers with specific background information. The list below only comprises the most important publications and does not take into account fact sheets, ad-hoc papers or presentations and articles which CER regularly produces to fully cover the various information levels of all stakeholders in order to efficiently support the lobbying activities on European level.

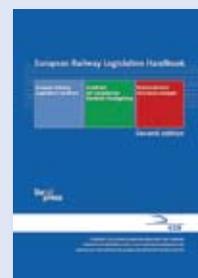
All publications can be ordered from the CER office or downloaded at www.cer.be. Here you also find further documents such as press releases or fact sheets and publications from previous years.

CER Books

New European Railway Legislation Handbook - September 2008

This handbook comprises a comprehensive collection of European railway legislation as it stands today.

Compared to the first edition of the European Railway Legislation Handbook in 2004, this standard work has been updated on important legislation. It now includes legal texts such as the directive on market opening for international passenger transport ('Third Railway Package') and the new interoperability directive, aimed at facilitating cross-border services through technical harmonisation ('Technical Package'). As a result the volume of the handbook has increased by almost 300 pages to 844 pages.



› *Rail Transport and the Environment: Meeting the Challenge*, May 2008

CER Essays

Aad Veenman

Rail-Related Services: Evolving markets in Europe - May 2008

This essay presents the problems of access to rail related services in the European Union as well as the tools currently at the disposal of operators to secure full and non-discriminatory access. Aad Veenman takes the reader through the intricacies of EU transport and competition legislation and outlines his position on discussions underway at EU level relating to a potential 'recast' of EU railway legislation.



› Henry Posner III - *Rail Freight in the USA: Lessons for Continental Europe*, January 2008

CER Brochures

- › *Railways and the Environment: Building on the Railways' Environmental Strengths*, January 2009
- › *Rail Transport and Environment. Facts & Figures*, June & November 2008

Rail Freight Quality Progress Report 2007/2008 - September 2008

In order to monitor recent developments in the market, CER regularly produces its own Rail Freight Quality Report since 2003.

The report shows that quality improvements within the rail sector are happening, in a context where environmental concern has become more acute. Rail is increasingly seen as an alternative to more environmentally damaging transport modes. The European railways are determined to play their full role in reducing the environmental impact of transport in Europe, and in first place, through continuous quality improvements.



- › *Eurovignette Brochure and Fact Sheet*, September 2008
- › *Noise Reduction in Rail Freight* - 23 July 2008
- › *Megatrucks vs. Rail freight?*, July 2008
- › *Rail Charging and Accounting Schemes in Europe: Case Studies from Six Countries*, June 2008
- › *From Truck to Train* - June 2008

CER Position Papers

- › *CER Position on Rail Freight Corridor Regulation*, February 2009

CER Position on the Internalisation of External Costs and the Revision of the Eurovignette Directive - January 2009

The updated position paper, agreed upon with seven transport associations, looks at the internalisation of external costs and the revision of the Eurovignette directive following the adoption of the Greening Transport Package by the European Commission on 8 July 2008. It also takes into account results of the debate in Parliament following the presentation of the rapporteur's report.



- › *Sector Position on Rail Noise Communication*, October 2008
- › *CER Position to the Second Strategic Energy Review*, September 2008
- › *CER Position on the Internalisation of External Costs and the Revision of the Eurovignette Directive*, July 2008
- › *CER Position on the Ban on the Use of Creosote: Possible Consequences for the Railway Sector*, June 2008
- › *CER Position on ERTMS Consultation*, February 2008
- › *Sector Position on the Safety Directive / Wagon Keeper Issues*, January 2008

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List of political events

In compiling the chronology below we have concentrated on main political events which took place in 2008 at European level with relevance to transport, focusing on the three European institutions.

1 January

Slovenia takes over the presidency of the European Union. It is the first presidency of one of the 12 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 of four legislative proposals aiming at reaching the EU's targets for reducing greenhouse gas emissions and enhancing energy efficiency

31 January

A stakeholder conference on the internalisation of external costs is organised by the European Commission

6 February

The Commission publishes its communication on Multi-Annual Contracts for rail infrastructure quality

19 February

The European Parliament approves the final version 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

7 April

EU Transport Council conclusions on the communication on a European rail freight network support rail freight network initiatives

23 April

The European Commission adopts an amendment to the European standard for train signalling and speed control - the European Train Control System (ETCS) - which guarantees a common standard that enables trains to cross national borders and enhances safety

30 April

The European Commission adopts guidelines on state aid to railway undertakings bringing enhanced legal certainty and transparency of public financing provided to the sector

9 May

Antonio Tajani replaces Jacques Barrot as European Commission Vice-President and Commissioner for Transport

26 June

The European Commission sends letters of formal notice to 24 member states regarding the implementation of the First Railway Package

1 July

France takes over the presidency of the European Union

4 July

The European Commission and the rail industry (manufacturers, infrastructure managers and undertakings) sign a Memorandum of Understanding in Rome aimed at accelerating deployment of the European Rail Traffic Management System (ERTMS) throughout Europe

8 July

The European Parliament votes in favour of including aviation in the Emissions Trading System (ETS)



8 July

The European Commission adopts the highly anticipated Greening Transport Package, which includes a proposal to revise the Eurovignette directive on charges for heavy-goods vehicles

9 July

The European Commission finalises the Technical Package which covers the new interoperability directive, a revision of the safety directive and amendments to the European Railway Agency (ERA) regulation.

22 July

The European Commission publishes the new Community guidelines on State aid for railway undertakings

4 September

The European Parliament unanimously votes in favour of the Cramer Report on freight transport in Europe calling for the Commission to take action to reduce emissions and other external costs, by ensuring the full implementation of the polluters pay principle for all modes of transport

8 September

The European Commission publishes the communication on the quality of rail freight services which acknowledges

continuous quality improvements in rail freight services. As a result, the Commission announces to step back from regulating on rail freight quality

11 December

The European Commission publishes a regulation proposal concerning a European rail network for competitive freight with the intention to increase the competitiveness of rail freight in Europe

17 December

The European Parliament adopts the Climate Package, consisting of four legislative proposals aiming at reaching the EU's targets for reducing greenhouse gas emissions and enhancing energy efficiency

2009

1 January

The Czech Republic takes over the presidency of the European Union

16 January

The European Commission releases a study on megatrucks carried out by consultants Transport & Mobility Leuven (T&M Leuven)

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List of CER events

CER organises several events each year and regularly meets with key stakeholders in the transport sector in order to represent the European railway sector. In compiling the chronology below we have concentrated on our high-level meetings and other events with relevance to transport, in which CER was involved.

16 January

CER meets Juliusz Engelhardt, the then newly appointed Undersecretary of State for the rail sector in the Polish Ministry of Infrastructure

24 January

The New Opera research project holds its 4th stakeholder conference in Brussels. CER moderates one panel

24 January

Slovenian Transport Minister Radovan Žerjav and other representatives of the Slovenian ministry of transport visit the CER offices in Brussels (at the beginning of the Slovenian presidency)



Johannes Ludewig at a working meeting with Slovenian Transport Minister Radovan Žerjav and his staff at CER

25 January

CER participates in a stakeholder consultation on State aid guidelines to railway undertakings, organised by the European Commission

29 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

30 January

CER meets with Romanian Transport Minister Ludovic Orban

31 January

CER participates in the Commission stakeholder conference on the internalisation of external costs in Brussels at the invitation of Commissioner for Transport Jacques Barrot and the Director General for Energy and Transport Matthias Ruete

1 February

CER meets with Laurens-Jan Brinkhorst, European coordinator of TEN-T priority project 6, i.e. the corridor "Lyon-Turin-Milan-Venice-Trieste/Koper-Ljubljana-Budapest"

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

22 February

CER meets with the cabinet of Stavros Dimas, EU Commissioner for Environment

22 February

The Australian Railway Association visits CER

26 February

CEOs from Central and Eastern European countries meet in Brussels with Transport Commissioner Jacques Barrot and Director General Matthias Ruete

28 February

CER/UIC High Level Freight meeting brings together the European Commission and freight CEOs in Brussels



DG TREN Director Enrico Gillo Pasquarelli, DG TREN Director General Matthias Ruete, Commissioner for Transport Jacques Barrot and CER Executive Director Johannes Ludewig

4 March

CER participates at a stakeholder meeting on megatrucks in Brussels

7 March

CER organises, together with Polish railways PKP and the Polish Ministry of Transport, a high-level conference on the implementation of the Third Railway Package and the public service regulation in Warsaw



Festive dinner opening of the high-level conference on the Third Railway Package in the Kolekji Jana Pawla II Museum in Warsaw

11 March

CER participates at a TAF TSI stakeholder day in Paris

11 - 12 March

CER participates in European Commission workshops on urban mobility.

13 - 14 March

CER attends the European Commission focal point meetings on administrative and operational bottlenecks

17 - 19 March

CER attends the 6th World Congress on High Speed Rail in Amsterdam

3 - 4 April

CER visit to JR East railway company in Japan



Visiting a Shinkansen maintenance workshop (Head of JR East maintenance workshop, Johannes Ludewig, JR East Vice-Chairman Yoshio Ishida, Hana Rihovsky and Libor Lochman)

3 - 4 April

CER participates in the COLPOFER conference in Berlin

8 April

Lunch debate on the climate change report in the European Parliament with MEP Karl-Heinz Florenz

16 April

An Azerbaijan ministry railway delegation visits CER

16 - 17 April

CER meets with German Länder Transport Ministers in Brussels

18 April

CER meets with Czech Vice-Transport Minister Vojtech Kocourěk

6 May

CER organises a conference on Eurovignette. Hans Joachim Schellnhuber, from the Potsdam Institute for Climate Impact Research, is a guest speaker.

6 May

CER was honoured with an address by the president of the European Commission, José Manuel Barroso, at its annual reception on 6 May. The event, held in Brussels' historic town hall in the Grand Place, marked the 20th anniversary of CER and was the first transport stakeholder event to be attended by the Commission President.

The reception attracted around 400 guests, including many representatives from the European institutions, CER's member companies, as well as other railway associations and companies.

Addressing the guests, Mr Barroso said that the railways were as important to Europe today as ever. Describing the railways as "the glue that binds the internal market together", he emphasised the role that the Commission could play in establishing a suitable framework, while allowing the sector to be responsible for its competitiveness.



CER Chairman Aad Veenman, European Commission President Jose Manuel Barroso, and Johannes Ludewig

7 May

CER General Assembly in Brussels

8 May

European rail sector commits to cut CO₂ emissions of trains voluntarily by 30% over the period 1990 to 2020

21 - 22 May

CER/EIM CEOs from European rail infrastructure organisations meet in Brussels with Director General Matthias Ruete

22 May

Social Dialogue Committee plenary meeting in Brussels

27 - 30 May

International Transport Forum in Leipzig. CER co-organises the panel on "The challenge of climate change"

30 May

Launch of CER book "Rail Transport and the Environment: Meeting the Challenge" by Wolfgang Tiefensee, German Minister of Transport



German Federal Minister of Transport Wolfgang Tiefensee, presenting the CER book at the 2008 International Transport Forum in Leipzig

7 June

CER/UIC High Level Passenger Meeting brings together European passenger CEOs in Ljubljana

4 July

Signing ceremony of the ERTMS Memorandum of Understanding between CER, EIM, ERFA, UIC, UNIFE and the European Commission in Rome

14 July

A number of CER freight CEOs visit important rail freight sites in the USA



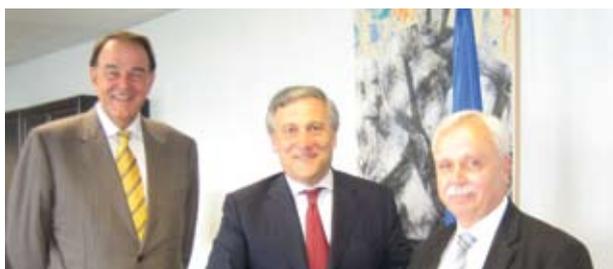
Technical expert Libor Lochman (CER) only apparently setting an American freight train on fire

16 July

CER organises a lunch event with Antonio Preto, Head of Cabinet of Transport Commissioner Antonio Tajani

23 July

CER Management Committee meets with the new Commissioner for Transport Antonio Tajani



Ad Veenman (CER President), European Commissioner for Transport Antonio Tajani and Johannes Ludewig (CER Executive Director) in the Commissioner's office

9 September

CER participates in the TAF TSI steering board meeting with DG TREN

15 September

CER meets with Czech Vice-Transport Minister Vojtech Kocourěk

18 September

CER meets with French State Secretary for Transport Dominique Bussereau



CER Executive Director Johannes Ludewig and French State Secretary for Transport Dominique Bussereau

19 September

CER presents the Fraunhofer megatruck study to DG TREN

22 September

CER General Assembly takes place in Berlin

23 September

The new European Commission Vice-President and Commissioner for Transport, Antonio Tajani, met with 32 CEOs of European railway and infrastructure companies at the margin of the InnoTrans rail industry fair in Berlin to discuss recent developments in European rail and transport policy.

Addressing 32 CEOs from the rail sector, Mr Tajani acknowledged that more investments in rail infrastructure are needed to further promote the revival of rail. He continued by saying that in recent years the Commission has most importantly contributed to such a revival through introducing market liberalisation, promoting interoperability and further initiatives in its three railway packages.



Commissioner Tajani meets CER CEOs at the Innotrans fair in Berlin

23 September

German Transport Minister Wolfgang Tiefensee launches the new European Railway Legislation Handbook published by CER at the InnoTrans rail industry fair in Berlin



Johannes Ludewig and German Federal Transport Minister Tiefensee during the presentation of the CER Legal handbook at the InnoTrans fair in Berlin

6 October

CER meets with Romanian Transport Minister Ludovic Orban

7 October

CER meets with Bulgarian Transport Minister Petar Mutafchiev

7 October

CER/EIM/ETF high-level conference on employability in Potsdam

9 October

European transport ministers meet in Luxembourg. Johannes Ludewig, invited by the French EU presidency, presents to the Council the role of rail freight corridors as the backbone of combined transport

16 October

CER meets with Serbian Vice-Prime Minister Mladjan Dinkic



Vice-Prime Minister Mladjan Dinkic and CER Executive Director Johannes Ludewig

21 October

CER meets with Estonian Transport Minister Juhan Parts

29 October

CER participates in the French presidency's "Freight without frontiers" conference in Paris

3 - 4 November

A Hungarian CER member delegation visits Brussels with the aim of meeting EU staff working particularly for Hungary in Brussels

3 - 4 November

CER/UIC High Level Freight meeting brings together European freight CEOs in Brussels

7 November

CER participates in a stakeholder meeting on the recast of the First Railway Package in Brussels

18 November

CER, EIM and UNIFE organise a dinner debate on the revision of the Eurovignette directive with Members of the European Parliament

24 November

CER meets with Polish Transport Minister Cezary Grabarczyk

1 December

A Chinese railway delegation visits CER

4 December

CER participates at the 4th Annual Meeting of Ministers on the Development of the South East Europe Core Regional Transport Network (SEETO).

5 December

CER CEOs from CEE rail companies meet in Brussels with DG TREN Director General Matthias Ruete

11 December

CER organises a lunch event with Antonio Preto, Head of Cabinet of Transport Commissioner Antonio Tajani

12 December

CER meets with Latvian Transport Minister Ainars Šlesers

2009

20 January

CER organises the Eurailfreight 2009 conference "New challenges of rail freight transport beyond liberalisation" in Brussels with the support of the Czech presidency of the EU



Left to right: Peter O'Donnell (moderator), Hans-Jörg Bertschi (Bertschi AG), Wojciech Balczun (PKP Cargo), Antoine Hurel (Veolia Transport) and Christoph Wolff (Railion)

20 January

Swiss Transport Minister Moritz Leuenberger and Bengt Sterner, a rail engineer from Sweden, receive the European Railway Awards 2009



European Railway Award 2009 laureate for the political category, Moritz Leuenberger, Minister for Transport in Switzerland, giving his acceptance speech



European Railway Award 2009 laureate for the technical category, Bengt Sterner, chief architect of ETCS / ERTMS, giving his acceptance speech

21 January

CER General Assembly takes place in Brussels. Mauro Moretti becomes the new CER Chairman.

30 January

Financial experts from the European Commission and the rail sector discuss practical ways to promote the use of public-private partnerships (PPPs) in rail infrastructure projects in a jointly organised workshop in Brussels.

The European Commission and the European Investment Bank are undertaking a number of initiatives aimed at promoting PPPs. The Loan Guarantee Instrument for TEN-T projects (LGTT) aims at facilitating the setting up of TEN-T projects under PPP schemes. The European PPP Expertise Centre (EPEC), launched in September 2008, allows PPP taskforces in EU member states and candidate countries to share experiences, expertise, analyses and best practices.

CER and EIM confirmed that PPPs provide innovative financial engineering opportunities, which could mobilise funding for key rail infrastructure projects. In order to reach this goal, building transparent partnerships with private contractors is of the utmost importance for rail companies. The private sector, represented by the companies Eurailtest, Global Infrastructure Service and Alstom, furthermore emphasised the need for clear and simple commercial structures and contractual frameworks.



Participants at the joint PPP workshop with the European Commission

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CER member statistics

CER regularly collects basic railway statistics of all CER members to provide European decision makers and the public with a more concrete picture of the railway sector in Europe. The following facts and figures give a brief overview of our members' activities in the European Union and beyond.

Infrastructure

In 2008, CER infrastructure companies managed 206,101 km of railway lines. This stands for a slight increase of 0.1% compared to the previous year. As 178,438 km (87%) of these lines are located within the EU25 (Malta and Cyprus do not have railway lines), CER represents 84% of all railway lines in the European Union.

Operating results of CER members

Passenger and freight operations

	2007 millions	2008 millions	_% 08/07
Tonnes carried	1,479.2	1,465.5	-0.9%
Tonne-kilometers	436,452	437,608	0.3%
Passengers carried	7,703	7,936	3.0%
Passenger-kilometers	541,012	552,776	2.2%

Passenger

Overall, private and state-owned CER rail passenger operators developed well in 2008: the total number of passengers carried went up by 3%, from 7.7 billion passengers in 2007 to 7.9 billion in 2008. Likewise, passenger-km increased by 2.2%, from 541 billion passenger-km in 2007 to 553 billion in 2008. However, latest figures, which CER has collected from its members in spring 2009, show a fall in numbers related to the current economic crisis: for countries in Central and Eastern Europe passenger-km fell by 5% in January 2009 compared to January 2008, while for the EU15 countries it was around 2% less.

Freight

Despite of the difficult economic conditions, private and state-owned CER rail freight operators were able to widely maintain their performance until the end of the year 2008. While the total number of freight tonnes carried decreased by 1%, from 1.48 billion tonnes in 2007 to 1.47 billion in 2008. At the same time tonne-km increased by 0.3%, from 436.5 billion tonne-km in 2007 to 437.6 billion in 2008. However, also for rail freight the figures have worsened according to the latest CER survey: tonne-km of European rail freight companies has declined by an average of 35% in January 2009 compared to January 2008.

Employment

The total number of employees in CER member companies decreased by 2.3% in 2008, from 1.315 million in 2007 to 1.284 million in 2008. This is an impressive number of jobs depending directly on the railways: staff employed by all CER members slightly surpassed the population of Estonia, which counted 1.341 million citizens in 2008. Considering also those jobs that depend indirectly on the railways, such as the rail supply industry or track maintenance companies, this number can most likely be doubled. The railways clearly remain an important employer in Europe.

CER Member	COUNTRY	Length of lines	Staff number		Passengers carried		Passenger-kilometres		Freight tonnes carried		Freight Tonne-km		Turnover		EBIT	
		in km		Δ% 08/07	millions €	Δ% 08/07	millions €	Δ% 08/07	millions	Δ% 08/07	millions €	Δ% 08/07	millions €	Δ% 08/07	millions €	Δ% 08/07
ADIF	ES	13,383	13,872	-2%	-	-	-	-	-	-	-	-	n/a	n/a	n/a	n/a
ASTOC	SE	-	11,300	1%	n/a	n/a	10,300	7%	n/a	n/a	17,400	1%	n/a	n/a	n/a	n/a
ATOC	GB/UK	15,814 ^p	55,454	1%	1,256.0	4%	50,442	4%	-	-	-	-	5,943.0	10%	n/a	n/a
BDŽ	BG	-	16,888	n/a	33.8	2%	2,335	-4%	17.6	-13%	4,031	-14%	288.0	0%	-47.0	▼
BE	LV	-	131	7%	-	-	-	-	3.7	30%	1,022	-9%	17.1	8%	0.23	▼
BLS	CH	434	2,541	2%	47.1	10%	740	16%	15.0	7%	3,697	10%	536.4	15%	1.3	▼
BRC	BG	-	210 ^c	81%	-	-	-	-	1.6	20%	640	21%	11.8	23%	0.02	▼
BRKS	SK	-	95 ^a	n/a	-	-	-	-	0.9 ^b	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Bulmarket	BG	6	160	n/a	-	-	-	-	n/a	n/a	2 ^b	n/a	n/a	n/a	n/a	n/a
ČD	CZ	-	46,404	-18%	175.2	-4%	6,759	-1%	86.0 ^p	-6%	15,961 ^p	-6%	1,608.5 ^p	-4%	-155.2 ^p	▼
CER ^a	HU	-	14	n/a	-	-	-	-	1.1	n/a	361	n/a	10.8	n/a	n/a	n/a
CFL	LU	275	2,993	4%	17.7	8%	345	9%	0.3	0%	9	-98%	428.9	-1%	15.3	▲
CFL Cargo	LU	-	534	11%	-	-	-	-	8.3	4%	271	-3%	134.0	12%	n/a	n/a
CFR	RO	10,777	28,215	-2%	-	-	-	-	-	-	-	-	285.8	-13%	-181.3	▲
CFR Călători	RO	-	17,075	0%	75.3	-12%	6,877.0	-7%	-	-	-	-	571.0 ^p	-2%	670.5 ^p	■
CFR Marfă	RO	-	17,985	-4%	-	-	-	-	44.5	-10%	9,002	-12%	468.8 ^p	-15%	-42.9 ^p	▼
CP	PT	-	4,169	0%	135.5	1%	3,814	4%	10.4	-2%	2,550	-1%	290.2	3%	-130.5	▼
CTL ^a	PL	101	2,500	n/a	-	-	-	-	18.3	n/a	4,068	n/a	250.0	n/a	n/a	n/a
DB	DE	33,862	240,242	1%	1,919.0	5%	77,791	4%	378.7	21%	113,634	15%	33,452.0	7%	2,483.0	▲
DB Schenker DK ^e	DK	-	311	-6%	-	-	-	-	6.6	0%	1,789	3%	61.0	-3%	3.3	▲
DB Schenker NL ^f	NL	-	893	-10%	-	-	-	-	31.2	-2%	4,830	3%	141.3	5%	n/a	n/a
DB Schenker UK ^g	GB/UK	-	5,013 ^c	3%	-	-	-	-	75.3	2%	16,645	11%	n/a	n/a	n/a	n/a
DSB	DK	1,711 ^d	9,229	0%	173.6	3%	5,974	2%	-	-	-	-	1,463.2	3%	171.5	▼
Eurostar	UK	109 ⁱ	1,684	1%	9.1	10%	993	5%	-	-	-	-	793.0	-1%	n/a	n/a
EVR	EE	1,280	1,821	-13%	-	-	-	-	26.1	-29%	5,581	-31%	105.4	1%	10.2	▼
FS	IT	16,529	91,442	-5%	584.0 ^j	6%	45,765 ^j	-0.5%	n/a	n/a	34,800 ^j	6%	10,216.0	7%	201.0	▼
GFR	RO	-	1,348	16%	-	-	-	-	6.8	36%	1,663	13%	92.7	18%	7.0	▼
GySEV/RoeEE	HU/AT	288	1,902	-6%	5.0	1%	195	-8%	6.4	-8%	708	-5%	118.7	-4%	1.0	▼
HUNGRAIL ^a	HU	7,913	32,907	n/a	149.6	n/a	8,726	n/a	53.9	n/a	10,075	n/a	n/a	n/a	n/a	n/a
HSB	AL	423	1,908	-4%	0.8	-25%	41	-20%	0.4	-13%	52	-2%	10.7	27%	7.4	▼
HŽ	HR	2,722	13,372	-1%	71.0	13%	1,810	12%	14.9	-6%	3,312	-7%	494.2	-2%	-8.4	▼
IÉ	IE	1,713 ^k	4,905	-2%	44.6	-2%	1,976	-2%	0.7	-13%	103	-20%	221.0	-4%	-197.0 ^l	▲
LDz	LV	2,263 ^p	13,520 ^p	-1%	20.4 ^p	-26%	751 ^{p,m}	-24%	56.1 ^{p,m}	7%	17,704 ^p	6%	n/a	n/a	n/a	n/a
LG	LT	1,765	10,717	2%	5.1	-2%	398	-3%	55.0	3%	14,748	3%	461.6	13%	41.3	▼
MÁV	HU	7,607	20,566 ^o	-40%	0.4 ⁿ	-99%	4 ⁿ	-100%	-	-	-	-	794.5 ^q	11%	170.8 ^q	▲
MÁV Cargo	HU	-	3,139	1%	-	-	-	-	41.9	-6%	8,380	-6%	347.2	-5%	-28.4	▼
MÁV-Start	HU	-	7,025	2%	107.9	98%	5,697	91%	-	-	-	-	258.7	90%	2.2	▼
NRIC	BG	4,144	16,381	-2%	-	-	-	-	-	-	-	-	139.1	1%	56.4	▲
NS	NL	-	16,817	2%	339.1	2%	16,180	4%	-	-	-	-	2,472.2	2%	281.0	▼
NSB	NO	4,114	2,397	-3%	52.0	6%	2,763	8%	-	-	-	-	436.0	-15%	5.7	▼
ÖBB	AT	5,664	43,069	-1%	208.0	4%	10,159	14%	98.5	2%	19,242	-1%	5,831.0	6%	51.2	▼

CER Member	COUNTRY	Length of lines	Staff number		Passengers carried		Passenger-kilometres		Freight tonnes carried		Freight Tonne-km		Turnover		EBIT	
		in km		Δ% 08/07	millions €	Δ% 08/07	millions €	Δ% 08/07	millions €	Δ% 08/07	millions €	Δ% 08/07	millions €	Δ% 08/07	millions €	Δ% 08/07
OSE	EL	2,552	6,771	-6%	13.3 ^s	49%	1,501 ^s	4%	3.2 ^s	-11%	575 ^s	-4%	n/a	n/a	n/a	n/a
PKP ^t	PL	19,627	121,663	-1%	223.3	-1%	17,961	1%	142.8	-7%	39,374	-10%	n/a	n/a	n/a	n/a
Rail Polska ^a	PL	-	280	n/a	-	-	-	-	1.6	n/a	242	n/a	n/a	n/a	n/a	n/a
RENFE Operadora	ES	-	14,364	0%	499.7	-1%	22,074	11%	22.0	-11%	9,737	-8%	1,941.0	20%	-141.6	▲
RegioTrans Brasov ^a	RO	543	293	n/a	2.4	n/a	56	n/a	-	-	-	-	1.6	n/a	-0.1	n/a
RFYMI	MK	699	1,530	2%	-	-	-	-	-	-	-	-	989.9	-5%	-933.4	▲
RFYMT	MK	-	1,396	-2%	1.5	32%	148	35%	4.2	-10%	743	-5%	2,174.7	-6%	-536.1	▲
SBB/CFF/FFS	CH	3,005	27,822	1%	322.6	5%	16,144	7%	54.4	1%	12,531	-6%	5,375.0	16%	320.3	▲
Servtrans Invest	RO	71 ^a	763 ^a	n/a	-	-	-	-	5.1 ^u	-2%	1,276 ^u	-3%	n/a	n/a	n/a	n/a
SLB	AT	35	138	-8%	4.8	-1%	58	1%	1.5	-2%	84	15%	n/a	n/a	n/a	n/a
SNCB/NMBS Holding	BE	3,513	36,991	1%	216.7	5%	10,403	5%	55.5	-4%	7,880	-3%	3,456.7	4%	-13.9	▼
SNCB/NMBS	BE	-	20,060 ^w	8%	216.7	5%	10,403	5%	55.5	-4%	7,880	-3%	2,213.0	3%	-75.5	▼
SNCF	FR	-	158,378	-2%	1,075.5	4%	86,325	6%	95.8	-9%	37,030	-9%	18,518.8	6%	856.0	▼
SŽ	SI	1,228	7,984	0%	16.7	4%	834	3%	19.0	-1%	3,873	-2%	398.7 ^p	13%	1.3 ^p	▼
SŽDC	CZ	9,487	10,545 ^x	1553%	-	-	-	-	-	-	-	-	705.0 ^p	33%	699.0 ^p	▲
TCDD	TR	8,697 ^a	31,244 ^a	n/a	79.3	-2%	5,164	-7%	22.7	9%	10,422	7%	n/a	n/a	n/a	n/a
Thalys	BE/FR	-	n/a	n/a	6.4	5%	n/a	n/a	-	-	-	-	392.0	9%	n/a	n/a
TRAIROSE ^v	EL	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TX Logistik	DE	-	174	20%	-	-	-	-	2.4	-4%	1,591	-7%	n/a	n/a	n/a	n/a
Veolia Transport	FR	-	1,504	-28%	60.8	15%	1,920	14%	-	-	-	-	n/a	n/a	n/a	n/a
VPE	HU	-	19	58%	-	-	-	-	-	-	-	-	1.9 ^p	23%	0.3 ^p	■
VR	FI	5,919	7,479	1%	69.9	5%	4,052	7%	41.9	4%	10,777	3%	819.6	8%	2.8	▼
WLB Cargo ^a	AT	-	45	n/a	-	-	-	-	2.7	n/a	645	n/a	n/a	n/a	n/a	n/a
ŽCG ^a	ME	330	1,954	n/a	1.2	n/a	135	n/a	1.8	n/a	183	n/a	n/a	n/a	n/a	n/a
ŽFBH	BA	601	4,067	1%	0.5	25%	39	24%	8.4	17%	918	21%	68.7	17%	n/a	n/a
ŽRS ^a	BA	416	3,415	n/a	0.7	n/a	36	n/a	4.9	n/a	369	n/a	34.0	n/a	-7.0	n/a
ŽS	SP	3,809	20,131	-4%	8.9	-10%	648	-15%	14.1	-5%	4,339	-5%	329.1	-12%	195.1	▲
ŽSR	SK	3,659	17,724	-1%	-	-	-	-	-	-	-	-	310.9	5%	-36.5 ^y	▼
ZSSK	SK	-	4,947	2%	47.2	4%	2,278	6%	-	-	-	-	284.3 ^z	14%	-22.5 ^z	▲
ZSSK Cargo	SK	-	10,499	-4%	-	-	-	-	44.5	-9%	8,910	-5%	n/a	n/a	n/a	n/a
GR ^a	GE	1,558	14,980	n/a	3.9	n/a	774	n/a	22.2	n/a	6,928	n/a	n/a	n/a	n/a	n/a
JR EAST ^f	JP	7,527	61,900	-2%	n/a	n/a	129,655	-1%	-	-	-	-	15,569	28%	2,094	▲

n/a Not available
- Not applicable

▲ Increase
■ No change
▼ Decrease

- a 2007 data
- b 2006 data
- c Average annual number of staff – full time equivalent
- d Length of lines only refers to lines served by DSB
- e DB Schenker Rail Danmark was formerly known as Railion Scandinavia.
- f DB Schenker Rail Nederland was formerly known as Railion Nederland.
- g DB Schenker Rail (UK) was formerly known as EWS.
- h Volumes exclude rail industry movements; Freight tonne-km includes estimate for international traffic and Eurocargo Rail
- i 109 kilometres as of 14 November 2007
- j Includes traffic of subsidiaries.
- k Active lines only.
- l Excludes grants of €222m (2007) and €203m (2008). These represent state grants for Public Service Obligations and Safety, a subvention from CIÉ and a release of provisions for liabilities.
- m 2008 data for passengers carried and passenger-kilometres are only for 9 months due to separation of subsidiary company "Pasazieru vilciens" from LDZ group in October 2008.
- n The Passenger Business Unit of MÁV Co. became independent company on 1 July 2007.
As a result, data referring to passenger transport concerns exclusively the volumes of the narrow gauge lines in the second half of 2007 and between January 2008 and December
- o MÁV Maintenance Co. and Záhony-Port transshipping company become independent companies in 2008.
- p Provisional
- q The sale of MÁV Cargo and the different amounts of public service contributions for passenger transport and infrastructure had an impact on the financial data during this period.
- r Fiscal year 2008 refers to the period 1 April 2008 to 31 March 2009. Likewise, fiscal year 2007 refers to the period 1 April 2007 to 31 March 2008.
- s Passenger and freight operating data only covers the first nine months of 2008 (and 2007 for the percentage calculation).
- t 2007 data covers data from Warsaw Commuter Railway (Warszawska Kolej Dojazdowa– WKD) until 30.09.2007 while 2008 data refers to data from PKP Przewozy Regionalne.
- u UIC data 2008
- v TRAINOSE, the Greek passenger and freight operator, became independent from the OSE Group on 01.01.2009.
- w Transfer of personal between Infrabel and SNCB.
- x As a result of the ongoing railway transformation, 10,000 employees were transferred from Regional Infrastructure Departments to SŽDC since 1 July 2008.
- y 2007 data includes consolidation of ŽSR
- z In local currency, turnover increased by 1.9% in 2008 compared to 2007. Turnover was 11.8 times better in 2008 than in 2007 in local currency, and 13.2 times better in EUR.

ABBREVIATIONS

AEO	Authorised Economic Operator
CEE	Central and Eastern European
CER	Community of European Railway and Infrastructure Companies
CLIM	European Parliament Temporary Committee on Climate Change
CO₂	Carbon Dioxide
CO	Carbon Monoxide
EC	European Commission
ECS	Export Control System
EIM	European Rail Infrastructure Managers
ENVI	European Parliament Committee on Environment
ERA	European Railway Agency
ERTMS	European Rail Traffic Management System
ETCS	European Train Control System
ETF	European Transport Worker's Federation
ETS	European Union Emissions Trading Scheme
EU	European Union
FIA	Federation Internationale de l'Automobile
ICS	Import Control System
IMF	International Monetary Fund
IRU	International Road Transport Union
MEP	Member of the European Parliament
NCTS	New Computerised Transit System
NOx	Nitrogen Oxide
OECD	Organisation for Economic Co-operation and Development
RER	Regional Express Network
RMMS	Rail Market Monitoring System
RNE	RailNetEurope
SEDP	Strategic European Deployment Plan
TAF TSI	Technical Specification for Interoperability on Telematic Applications for Rail Freight Transport
TAP TSI	Technical Specification for Interoperability on Telematic Applications for Passenger Transport
TEN-T	Trans-European Transport Network
TEU	Twenty Foot Equivalent Unit
TGV	Train à Grande Vitesse / High Speed Train
TRAN	Committee on Transport and Tourism in the European Parliament
TSI	Technical Specifications for Interoperability
UIC	International Union of Railways
UIP	International Union of Private Wagon Owners
UIRR	International Union of combined Road-Rail transport companies
UITP	International Union of Public Transport
UNIFE	European Railway Industry Association

CER ERA WORKING GROUPS

Safety Unit

CSM	Common Safety Methods (SSMG)
CST	Common Safety Targets (SSMG)
SC	Safety Certification (SSMG)
CSI	Common Safety Indicators (SSMG)
CMW	Certification of Maintenance Workshops (SSMG)
CECM	Certification of the Entity in Charge of Maintenance (SSMG)
SSMG	System Safety Management Group

Interoperability Unit

PAC/LOC	Passenger Carriages/Traction Units and Locomotives
TAP	Telematic Applications for Passenger
INF	Infrastructure
ENE	Energy
NOI	Noise
ERATV	European Register for Authorised Types of Vehicles
OPE	Operations and Traffic Management
WAG	Freight wagons
1520	1520/1524 mm rail system
DL	Driver Licence / Vocational Competences
ATC	Accreditation of Training Centres
RINF	Register of Infrastructure
RST	Rolling Stock
HR	Human Resources

ERTMS Unit

CG	Control Group
CCS	Control-Command & Signalling
ERTMS	European Rail Traffic Management System
OPEERTMS	Operations and Traffic Management / European Rail Traffic Management System

Cross Acceptance Unit

XA	Cross Acceptance
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Economic Evaluation Unit

ESG	Economic Survey Group
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Other

SP	Speakers' Platform (Safety+Interoperability+Economic)
SU	CER ERA Steering Unit
CSG	Conformity Survey Group
ERA	European Railway Agency
CER	Community of European Railways and Infrastructure Companies
RRB's	Railway Representative Bodies
TMP	Technical Management Platform
JPCR	Joint Programming Committee Rail
SG	Support Group

CER

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