

Annual Report 2010-2011



COMMUNITY OF EUROPEAN RAILWAY AND INFRASTRUCTURE COMPANIES



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FOREWORD

The last 12 months have been marked by a number of key policy milestones, in particular the long anticipated Transport White Paper which set out EU transport policy for the next ten years and beyond. The focus must now be on how to implement the proposed measures if this vision is to become a reality in the next decade. The European Commission also adopted a proposal to recast the first railway package. CER hopes that decision-makers will not only acknowledge the importance of this dossier but also carry the recast proposal as quickly as possible through Parliament and Council, so that the important improvements it offers for the rail sector can be implemented as soon as possible.

On 28 March 2011, the European Commission published the long anticipated White Paper on transport. In particular, the White Paper set for the first time an overarching goal of reducing greenhouse gas emissions from transport by around 20% below the 2008 level by 2030, and by at least 60% on the 1990 level by 2050. CER strongly welcomes the Commission's long-term goals for Europe's transport system: we have long supported the need for greater attempts to be made to tackle the environmental impact of transport, and we believe that firm targets will help to ensure that action actually takes place in the transport sector. CER is calling upon European decision-makers to implement the listed measures as quickly as possible in order to achieve these goals. The experience of the Transport White Paper of 2001 clearly showed that there can be a big and ever-growing discrepancy between outlined political objectives on the one hand and real progress achieved by implementing concrete measures on the other if sufficient steps are not taken. This must not happen again. The key challenge is whether there is the political will on the side of European Commission, European Parliament and member states to really implement the necessary measures.

In a market economy it is obvious that prices must play a key role in achieving such targets. The Commission underlined in the White Paper the importance of giving the right price signals and internalising external costs. Reaching an agreement on the revision of the Eurovignette Directive is essential to show that there is sufficient support to take these wider proposals forward. While CER would like to have seen as strong a revision as possible of the Eurovignette Directive, it is essential that an agreement is now reached soon between Parliament and Council. This will then allow member states to get on with implementing charging for external costs, and demonstrate the role that economic tools can play in creating a more sustainable transport system.

The last months of 2010 were marked by CER members working on a common position on the European Commission's proposal to recast the first railway package and allow the creation of a Single European Railway Area. We hope that decision-makers will not only acknowledge the importance of this dossier but also carry the recast proposal through the Parliament and Council as quickly as possible. The proposal brings about important and much-needed improvements, especially with respect to multi-annual contracts for the financing of rail infrastructure, non-discriminatory access to rail-related services and strengthening of regulatory bodies so as to ensure more effective competition in all EU countries. These last elements are of fundamental importance for a stable business environment for the rail sector, which however still needs to be completed to realize the Single European Railway Area.

In the months ahead, CER will continue to pro-actively drive forward the debate on a more sustainable future for European transport. We will also raise the key issues of financing rail infrastructure and the rail sector's crucial importance in Central and Eastern Europe. In addition, we will strongly articulate the case for rail as the Commission revises the TEN-T guidelines: under this proposal, the EU will take its first step towards re-defining the shape of EU transport networks. CER supports developing a wide and comprehensive transport network, while concentrating efforts on a core network of the highest strategic importance. Moreover, we believe that future TEN-T policy should, as one of its main priorities, promote the use of energy-efficient and environmentally-friendly modes of transport in order to help meet Europe's goals of reducing transport-related CO₂ emissions.

Finally, CER improved its already close cooperation with the European Railway Agency (ERA) in a number of areas over the past year. However, the competence of ERA is not yet strong enough to enforce the cleaning up of superfluous national technical rules, nor to audit National Safety Authorities in order to prevent possible disruption to the internal market for EU rail caused by new national safety rules.

Railways are more than just high-quality locomotives, wagons or tracks. CER members employ more than one million employees who take their business a step further forward every day. That is why we placed them not only at the heart of our 2011 calendar but also at the centre of our annual report.

In all these activities, alongside our members, CER aims to be a reliable partner for the EU institutions as well as for national governments – a partner who is both critical and supportive at the same time. We will continue developing new ideas and proposals, reflecting the experience and the needs of the European railway sector, and we will put forward these ideas and proposals to European political decision-makers to help contribute constructively to the debates on European legislation and its implementation, and ensure a better transport system for the future.



Mauro Moretti
CER Chairman



Johannes Ludwig
CER Executive Director

Guest contribution by Siim Kallas

European Commission Vice-President, responsible for transport

It is only fitting that an annual report offering a glimpse of the recent past should start off with a vision for the future. The European Commission recently unveiled its White Paper "Roadmap to a Single European Transport Area"¹ offering a vision of European transport that is highly competitive but also addresses the challenges of climate change and reducing oil dependency. We expect much from rail, so the White Paper includes concrete initiatives that will help give rail back its lustre.

In the 19th century the advent of rail with its speed and convenience ushered in the industrial age. Today rail presents one of the best chances for unlocking a new age of sustainability. However, before rail can live up to its full potential, a lot of work will still need to be done. Despite its theoretical advantages, rail still suffers from a fragmented rail market with divergent standards as well as from a lack of competitiveness compared to other transport modes. To enhance the appeal of rail the rail transport market will need to be fully opened to competition, the interoperability of national networks will need to be improved and infrastructure will need to be substantially developed.

The new White Paper develops these three. It recognises that we cannot grow transport while reducing its impact on the environment and reducing congestion, simply by relying on road and air: rail will have to take on a significantly greater proportion of medium and long distance traffic. This will involve considerable investment to expand or upgrade the capacity of the rail network. An important part of this will be high-speed railway lines. High-speed rail is already an attractive alternative to aviation for trips between many cities within Europe. The length of the existing high-speed rail network shall be tripled by 2030, while the European high-speed rail network should be completed by 2050.

To ensure the innovation needed to expand quality services and attract new customers, a true internal market will be needed for rail services. This includes opening domestic rail passenger services to competition, including mandatory award of public service contracts through competitive tendering. In addition the role of the European Railway Agency (ERA) must be reinforced to achieve a single process of vehicle type authorisation and railway undertaking certification across the EU. An integrated approach to freight

corridor management should be developed, including track access charges, while an effective and non-discriminatory access to rail infrastructure should be ensured, including rail related services. In this context we have also to deal with structural separation between infrastructure management and service provision. Technology will play a vital role in improving the efficiency, safety and quality of rail services. Once the European Rail Traffic Management System (ERTMS) has been fully implemented, Europe will enjoy a common standard that will enable trains to cross national borders while enhancing safety.

Our transport strategy also requires better integration of different transport modes to make it easier for people and goods to switch between them. Thus we need to ensure all key airports enjoy access to the rail network by 2050, preferably to high-speed lines. All important seaports should also have rail freight connections. A better integration of the different modes will make rail more attractive to many passengers.

Finally the White Paper highlights the need to ensure sufficient financing for transport developments and the challenges to be overcome to achieve this. Currently prices do not reflect the cost of the negative effects transport has on the environment, such as noise, pollution and congestion. More accurate pricing should ensure that in choosing between modes, customers consider the real costs involved – which is likely to increase the appeal of more sustainable transport modes such as rail.

Let me also use this opportunity to thank CER for our good and constructive cooperation and for your contributions during the preliminary consultations on our new White Paper.

Carrying out this ambitious strategy for transport in the coming decades means challenging but exciting times are ahead for rail.



Siim Kallas

European Commission Vice-President



CER Chairman Mauro Moretti, European Commission Vice-President Siim Kallas and CER Executive Director Johannes Ludewig

¹ http://ec.europa.eu/transport/strategies/2011_white_paper_en.htm

Guest contribution by Pál Völner

Hungarian Minister of State for Infrastructure and current Chairman of the Transport Council



The years 2010-2011 are very important milestones in the European rail sector. Just a few days after the adoption of the regulation of the European Parliament and of the Council concerning a European rail network for competitive freight on the 22 September 2010, the Council started the debate on the draft directive on

the establishment of the single European railway area. On 28 March, the Commission published the Transport White Paper and continues preparing the proposal for a revision of the guidelines on the Trans-European Transport Network (TEN-T) policy expected to be published later this year. These are all key milestones in the development and competitiveness of the railway market in the coming years, and even decades. In this context, the Hungarian Presidency together with CER recently organised an event to discuss the future shape of TEN-T which will certainly contribute to this debate.

One of the main messages of the White Paper is that the reduction of environmental pressure and the development of environmentally friendly means of transport are essential in long-term planning, and this will enable future generations to live a healthier and more sustainable life. As Vice-President Siim Kallas noted in his contribution, rail will play a key role in the implementation of this task.

Rail transport is one of the least polluting forms of transportation. It cannot always substitute the various forms of road transport, but for longer distances or suburban transport – assuming a service of adequate quality – rail offers an appropriate alternative to road transport, and high speed networks represent competition for air travel.

Beyond reshaping the legal and administrative framework for railway transport, we should not forget the technological obstacles either. Recently, national rail companies have developed unique, individual technological solutions that currently pose an obstacle to the creation of a real single European rail transport area. The elimination of these obstacles will demand more patience, time, and even more money from the member states.

The long-term target, however, is clear. Passengers and goods will be carried across Europe on safe railways of identical technological standards, providing high level services, without putting more pressure on the environment than necessary.

Currently, our Eastern European railway infrastructure does not match Western European standards, but conscious development will support the growth of the railway sector, with a fast and safe network composed of the major railway lines.

Hungary does not wish to miss out on the renaissance of rail transport, which will storm not only across Europe but also other parts of the world. In the near future, our rail development focuses on two key European axes crossing Hungary: railway corridor No. 6 (Lyon-Milan-Ljubljana-Budapest-Záhony railway line) and No. 22 (Athens-Sofia-Budapest-Vienna-Prague-Nuremberg/Dresden). Beyond the urgent task of implementing the technical conditions of interoperability long-term concepts have also been identified in relation to future high speed railway axes running from Vienna to Athens through Budapest or from Venice to Kiev through Budapest.

Nevertheless, long-term visions are not enough; we need precise plans. A new transport development concept is under preparation in Hungary, which, divided into chapters, also serves as a sectoral strategy for detailed railway development. This concept is being constructed with a bottom-up approach, and integrates corporate strategies of large infrastructure management companies (MÁV and GySEV), together with the national railway development strategy that is based on it. This allows optimal, efficient distribution of resources – in other words, quality infrastructure development based on an economical approach.

In conclusion, in the next years and decade, we need to make serious efforts to boost the position of the rail transport sector, both on a member state and an EU level, to ensure that it becomes an energy efficient, environmentally friendly, safe means of transportation in the European Union, which, on the one hand, promotes economic growth, and, on the other, acts as a driving force behind regional development. I wish all of us success in achieving these goals!



Pál Völner
Hungarian Minister of
State for Infrastructure



CHAPTER 1

INTRODUCING CER

The voice of European Railways

For 23 years, CER has been recognised as the voice of European railways – **delivering practical and reliable information to the European institutions** in the debate about the future of transport. As such, CER represents the interests of its 78 members contributing to an informed decision-making process in the EU.

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 **78 infrastructure companies, railway undertakings and vehicle keepers** – new entrants and established companies, public and private, separated and integrated, large and small. CER members represent 75% of the rail network, 85% of the rail freight business and 90% of the rail passenger business in Europe. In fact, CER members directly create 1.2 million jobs.

Members come from the European Union, Norway and Switzerland, the candidate countries (Croatia, Macedonia and Turkey) as well as from the Western Balkan countries. Among these 78 companies, 76 have full membership status. JR East (the East of Japan railway company) and Georgian Railway Ltd are formal CER partners and collaborate with CER on a number of issues.

CER is based in Brussels and represents the interests of its members to the European Parliament, European Commission and Council of Ministers, as well as to other policy-makers and transport actors. **CER promotes a strong rail industry** that is the basis of a **sustainable European transport system**.

Lobbying by quality

CER's interests cover all policy areas that have the potential to impact on railway transport. In close co-operation with its members, CER monitors and evaluates the implementation of policies. Through our permanent dialogue with policy-makers we propose adjustments to legislation to address ongoing problems.

CER in brief

CER brings together 78 infrastructure companies, railway undertakings and vehicle keepers – new entrants and established companies, public and private, separated and integrated, large and small. CER members represent 75% of the rail network, 85% of the rail freight business and 90% of the rail passenger business in Europe; 1.2 million jobs are directly created by CER members.

CER joined the European Commission's online register of interest representatives. By registering, CER enhanced the transparency of its relations with the Commission as it has done with other European institutions before.

Communicate the railways

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

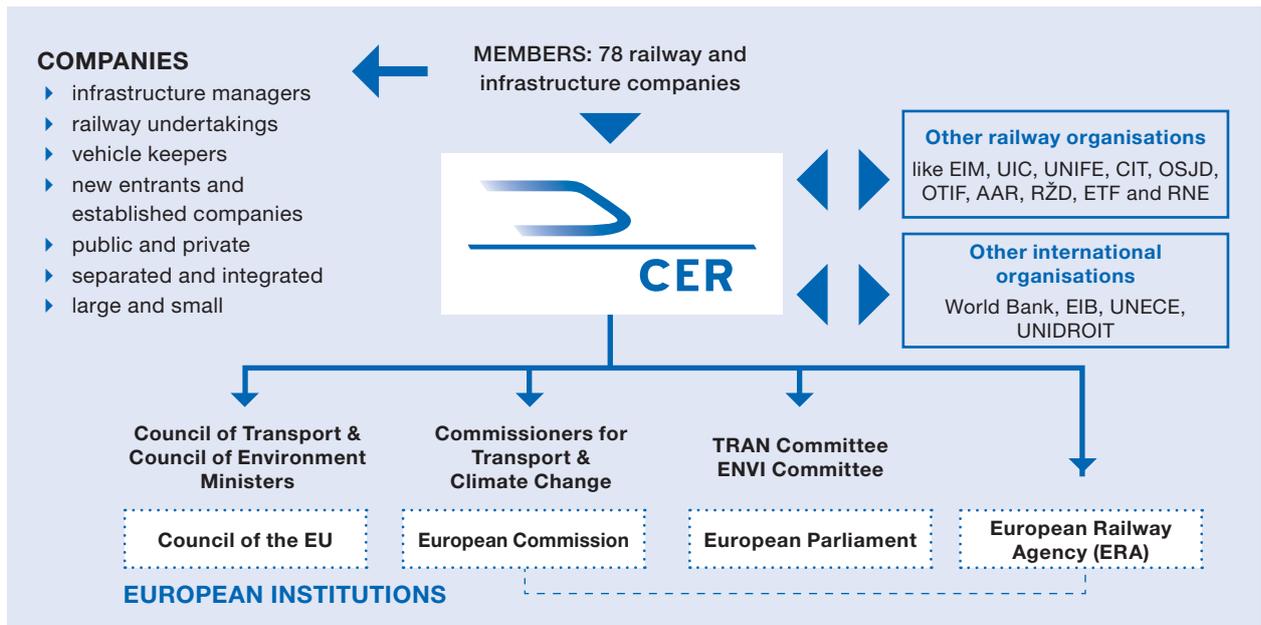
Using a wide range of internal and external communication tools, CER aims to present the sector's positions to European institutions, the public and CER members.

Events and media relations are used to raise awareness of CER positions, while publications provide essential information on many issues. Internal communications tools, like the weekly newsletter, *CER Monitor*, keep CER members up to date on recent transport developments in the EU. Over the past year, two new information tools have been launched on a monthly basis. **The CER Technical Monitor informs members about ERA-related activities, and the CER Environment Monitor focuses on rail-related environment issues.**

From a peak of over 1,000 journalists in Brussels in 2005, the number of journalists has decreased to about 850 in recent years. Those who stayed have continued to make an impact on influencers and decision-makers. However, having to cover more and more sectors they have become increasingly selective. To meet their needs, CER has revamped some communication basics, focusing increasingly on how and when it engages with the media.

The regularly updated CER website (www.cer.be) provides easy access to position papers, brochures, press releases, events and much more. **Our monthly electronic newsletter, CER Newstrack**, keeps all stakeholders up to date on European rail transport policy and the rail business. A **new CER book *Reforming Railways – Learning from Experience*** gives a comprehensive overview of railway reforms in Europe and worldwide.

Figure 1: Who we work with



Dialogue with partners

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

Other rail organisations are regularly invited to **participate in CER working groups**. Discussions on infrastructure, freight, and passenger issues are frequently held between CER experts from the Brussels office and CER members and representatives from the European Rail Infrastructure Managers (EIM), the International Union of Railways (UIC), the European Rail Industry (UNIFE), and the International Union of Public Transport (UITP). Recent activities have also led to close co-operation between rail associations on technical issues. Since its establishment by the EU in 2004, the European Railway Agency (ERA) has become another key partner in most technical harmonisation issues (see more on page 25).

CER also maintains close relationships with the European Federation of Railway Trackworks Contractors (EFRTC), the European Transport Workers' Federation (ETF), the International Union of combined Road-Rail transport companies (UIRR), RailNetEurope (RNE) and the International Rail Transport Committee (CIT), among others. On specific issues, CER liaises with non-rail organisations too, including NGOs, such as Transport and Environment (T&E), road lobby organisations, like the International Road Transport Union (IRU) and the Federation Internationale de l'Automobile (FIA), as well as financial bodies, such as the European Investment Bank (EIB). CER is also a member of the Centre of European Policy Studies (CEPS) and Friends of Europe, two Brussels based think-tanks as well as Rail Forum Europe, an MEPs' platform dedicated to rail transport.

Ken Livingstone and Stefan Haas receive European Railway Award

The European Railway Award 2011 was presented to former Mayor of London, **Ken Livingstone**, for political achievements, and to Knorr-Bremse Austria Managing Director **Dr Stefan Haas** for technical achievements. Since 2007, the European rail sector has honoured outstanding achievements in the development of competitive and environmentally sustainable rail transport. The European Railway Award 2011 attracted more than 500 guests from all over Europe, including high-level politicians and transport stakeholders.

As the keynote speaker, **European Commission Vice-President Siim Kallas** spoke of the future of European competitiveness and the critical role that railways will play in confronting tomorrow's environmental challenges. Addressing the audience, he stated that, "Railways are an essential part in responding to global competition and they should play a major role in reducing the dependency of Europe on fossil fuels and the reduction of our emission of greenhouse gases".

The former Mayor of London Ken Livingstone received the European Railway Award 2011 for his decision to implement the congestion charge in inner London on 17 February 2003, a scheme that was instrumental in setting an example of how to improve the sustainability of transport. When accepting the award, Mr Livingstone outlined his thoughts behind the decision to implement such a revolutionary policy. "The London congestion charge has been clearly effective in encouraging people to switch to public transport and less-polluting alternative modes of transport. Applying the 'polluter pays' principle clearly demonstrates the benefits that can be achieved through the proper charging for external effects of road transport, and I encourage other cities to follow."

The European Railway Award 2011 for technical achievements was presented to the Austrian rail engineer Dr Stefan Haas. In a personal laudatory speech, UNIFE Chairman Dr Hans-Jörg Grundmann said: "Dr Haas made the Eddy Current Brake become a successful, reliable and cost-efficient product that has exceeded all expectations by far. With this he contributed substantially to building a Single European Railway Area without market and technical barriers."

The European Railway Award was initiated in 2008 by CER and is now jointly organised with the European Rail Infrastructure Managers (EIM) and the Association of the European Rail Industry (UNIFE).

Pictures of the European Railway Award 2011 and the CER, EIM and UNIFE annual reception are available at www.annualreception11.eu

European Railway Award Winners



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



Technical Award Winner 2007
Jean Dupuy
Former Director General of SNCF



Political Award Winner 2009
Moritz Leuenberger
Former Swiss Transport Minister



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



Political Award Winner 2010
Felipe González
Former Spanish Prime Minister



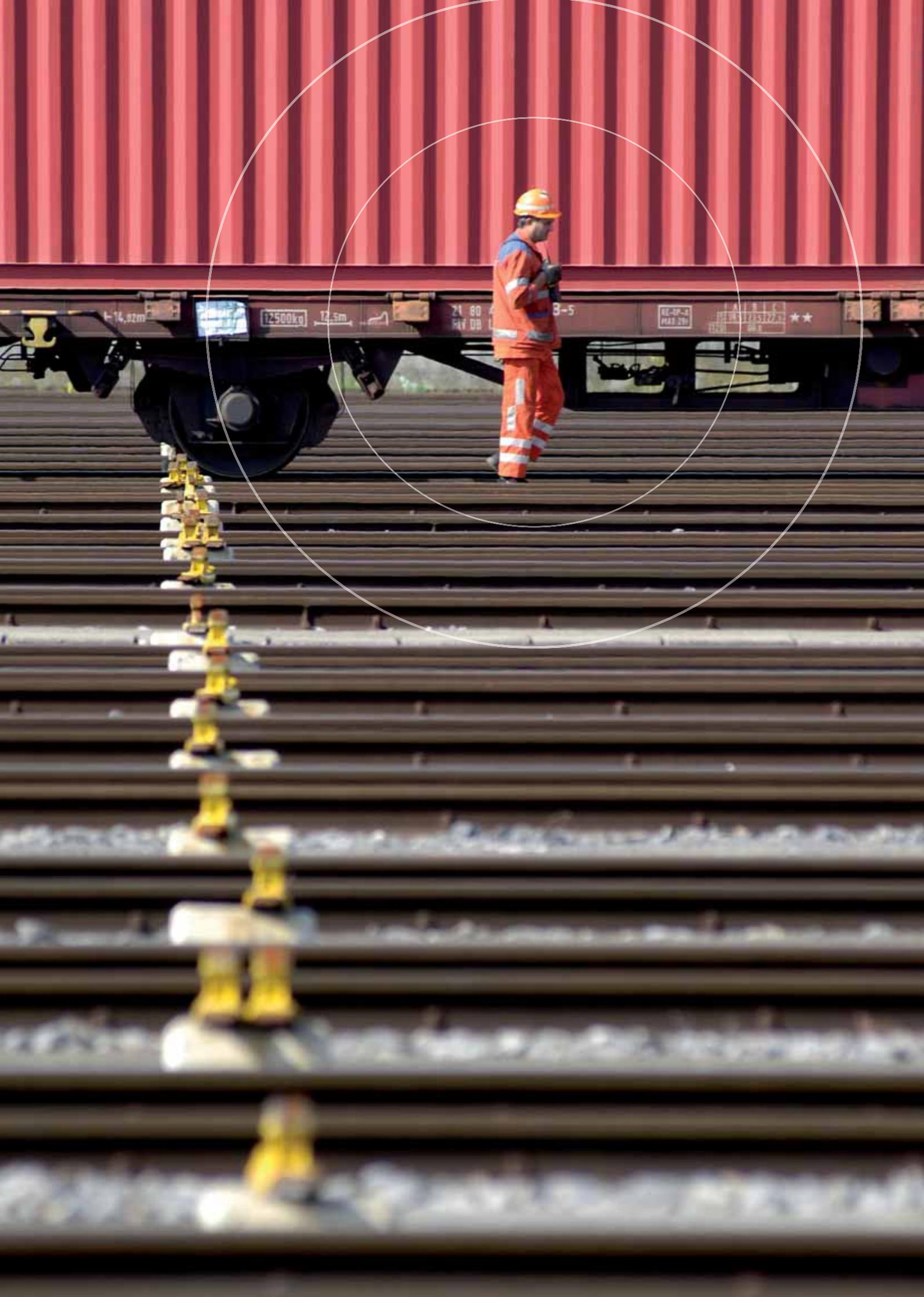
Technical Award Winner 2010
Roland Heinisch
Former Member of the Board of DB and former Chairman of DB Netz



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



Technical Award Winner 2011
Stefan Haas
Managing Director Knorr-Bremse Austria



CHAPTER 2

IMPROVING THE BUSINESS ENVIRONMENT FOR RAILWAYS

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Railways on track to recovery

After a difficult year in 2009, which saw rail passenger companies losing revenue and rail freight performance decline by over 20%, recent CER data shows that rail transport volumes are growing again across Europe.

For the full year 2010 compared to 2009, rail freight increased by 5.4% in Western Europe and by more than 7% in Eastern Europe. The rail passenger sector in Western Europe also grew by nearly 2% in 2010 compared to 2009, although it contracted by 4.5% in Eastern Europe. With the exception of the passenger data from Eastern Europe, the CER data shows that the sector is recovering from the economic crisis. The data presented here is the result of a questionnaire on the performance of the rail passenger and freight sectors conducted by CER on a quarterly basis.

Strong growth in rail freight sector

The results of 4Q2010 show a mixed picture for the rail freight sector in Europe. Compared to the same period in the previous year, tonne-kilometres in Western Europe decreased by 5.5% in 4Q2010. In particular, October 2010, and to a lesser extent December 2010, saw reduced

freight performance by a large number of freight operators. These reductions are partially the result of extraordinary occurrences unrelated to normal rail freight activities, such as harsh weather conditions, social movements, etc. Nonetheless, for the full year 2010 compared to 2009, tonne-kilometres increased by 5.4% because of the strong performance of the first three quarters in 2010.

In Central and Eastern Europe, the recovery in 2010 was more pronounced. In 4Q2010, freight operators were able to increase tonne-kilometres by 4.2% compared to the same period in the previous year. Building on the strong performance of the first half of 2010, the results for the full year 2010 in Central and Eastern Europe saw tonne-kilometres increase by 7.6% compared to 2009. This is particularly promising considering that tonne-kilometres in Eastern Europe have been declining in the 1990s and stagnating since 2000.

Figure 1: Quarterly Rail Freight Development (million tonne-kilometres)

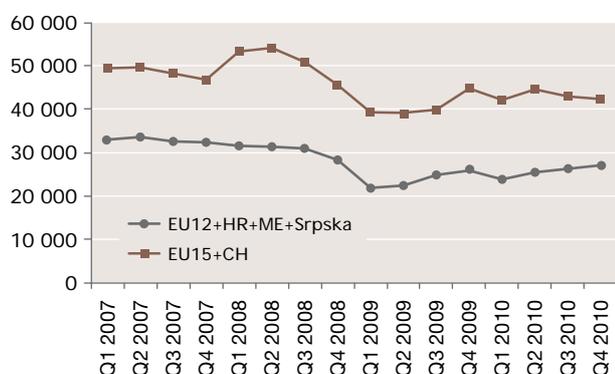
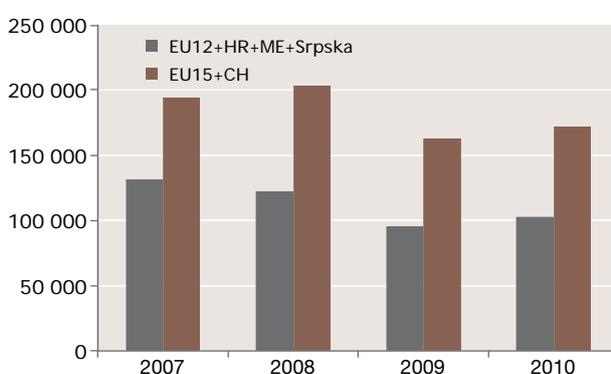


Figure 2: Annual Rail Freight Development (million tonne-kilometres)



Adverse development of passenger traffic

The rail passenger sector in Western Europe continued to grow for the fourth consecutive quarter. Compared to the same period in the previous year, passenger-kilometres in 4Q2010 increased by 1.9%. After a slight contraction in 2009, passenger-kilometres increased by 3.1% for the full year 2010, and surpassed the 2008 level.

In Eastern Europe, the rail passenger sector continued to contract in 4Q2010. Compared to the same period in the previous year, passenger-kilometres decreased by 0.8% in 4Q2010. Nonetheless, this contraction is an improvement on the performance of the previous quarters in 2009 and 2008, where much larger reductions in passenger-kilometres were recorded. For the full year 2010, passenger-kilometres decreased by 4.5% compared to 2009.

The continued decline of passenger traffic in Eastern Europe is, however, a reminder of the severe financial problems rail companies face in this region. In Eastern Europe only 70% of public service obligations are reimbursed by governments, and rail infrastructure continues to be chronically underfinanced. This has not only led to speed reductions and quality problems, but has also led to exceedingly high levels of track access charges, making rail transport in Eastern Europe less competitive vis-à-vis their West European counterparts and other modes.

Figure 3: Quarterly Rail Passenger Development (million passenger-kilometres)

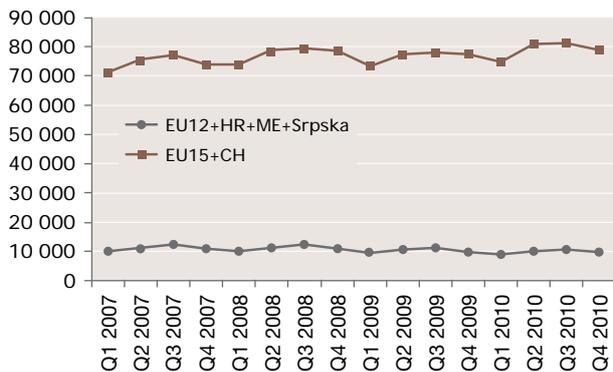


Figure 4: Annual Rail Passenger Development (million passenger-kilometres)

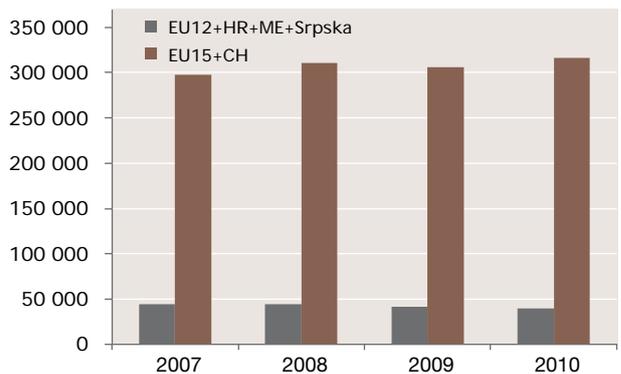
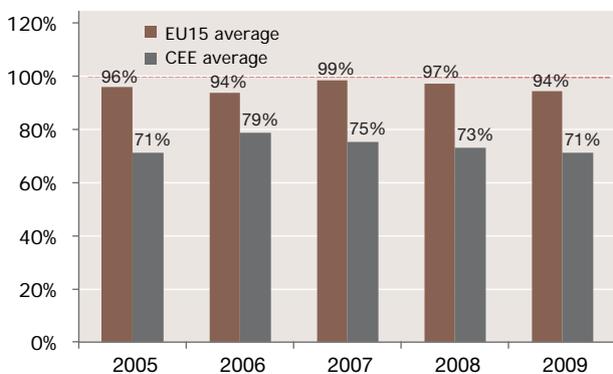
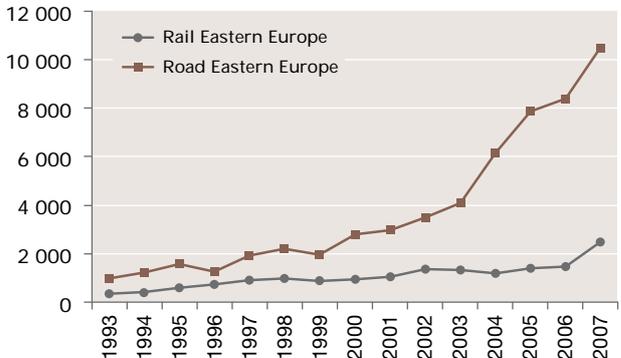


Figure 5: Public Service Obligations in EU15 and CEE (% of state compensation of total cost minus sales)



Source: ITF 2009

Figure 6: Infrastructure financing (excluding maintenance) in Eastern Europe (million EUR, at current prices)



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The recast of the first railway package: an opportunity not to be missed!

In September 2010, the European Commission published a proposal to recast the first railway package. Its aim is to strengthen the foundations upon which an open, competitive rail transport market can work effectively. The chart below gives an overview of the elements necessary for the railway system to function. The proposal, which is strongly supported by CER, is now being discussed by the European Parliament and Council. **CER strongly supports the European Commission's proposal and is even more ambitious on some points.**

The first railway package adopted in February 2001 contains three directives on market opening (2001/14), licensing (2001/13), and on the allocation of infrastructure capacity (2001/14). These texts aimed to set out the groundbreaking elements **for an open and competitive rail transport market.**

Ten years later, the European Commission is proposing to recast the first railway package with a view to clarifying certain provisions while reinforcing others. During these ten years, two additional legislative packages were adopted as well as a series of legislative texts on technical aspects, such as technical interoperability, etc.

CER welcomes the publication of the recast and supports its content to a large extent. The proposal deals with a number of

issues which have been on CER's agenda for several years. It is high time that the European institutions focused their efforts on the framework conditions which are necessary for the creation of an effective European railway area.

Improving the financial architecture

As in every network industry sector, healthy financial framework conditions are the **cornerstone of any successful business activity**. For years, CER criticised the fundamental imbalance of financial framework conditions applying to the rail sector. As a result, the European Commission picked up CER's concerns and now proposes to reinforce the rules relating to infrastructure financing in Europe in the recast proposal.

Figure 1: Timeline



These improved conditions relate to:

- The compulsory conclusion of multiannual contracts between member states and infrastructure managers. Such contracts are to be concluded within the context of an overall strategy plan developed by the member state concerned;
- Incentivising additional investments in the sector tailoring particular concerns on noise and ETCS;
- Obliging public authorities to face their responsibilities with regard to the treatment of historical debt; and
- Clarifying rules related to track-access charging with a view to avoiding major differences in charging levels throughout the European Union.

In full agreement with the Commission's position, CER believes that **all parties concerned must face their financial responsibilities in a fair and balanced manner** to ensure that expectations for the creation of a European railway area can become a reality.

Recast of the first railway package

CER has produced a series of position papers covering the wide range of issues which were expected to be dealt with in the recast. **These papers provide a good source of background information helping the reader to understand the intricacies of the recast proposal.**

An umbrella paper gives a summary of all positions and a global overview of CER views on a successful recast of the rail sector.

The individual position papers concentrate on the necessity to reinforce the existing financial architecture (in particular, the position papers on financial architecture, multiannual contracts, track-access charges and noise-related track-access charges). They provide input on how to further enhance competition within the rail sector by addressing the issues of access to rail-related services, the need for enhanced transparency of network statements, and strong and well-staffed regulatory bodies as guardians of fair competition in the market.

All position papers are available in the publications section of **www.cer.be**.

Clarifying access to rail-related services

With regard to the issue of non-discriminatory access to rail-related services – those services that are ancillary to operation – CER and the European Commission do not agree on all aspects of this issue. While CER supports the European Commission's wish **to achieve non-discriminatory access to rail-related services**, CER does not believe that the European Commission's proposed approach is suited to the development of these services. While the Commission would like to oblige service operators holding a dominant position to provide unconditional access to their service facilities, CER believes that unconditional access should be limited to

those services that are 'essential' (services for which access is 'essential' to be able to enter a market and for which there exists no viable alternative). For example, if a railway undertaking needs to have access to the only maintenance shop in a specific geographical area to be able to enter the related market, it is likely that the maintenance shop will be considered 'essential'.

CER notes that the market for rail-related services is currently booming, with private innovative initiatives developing wherever business opportunities can be found. Imposing a systematic access to all services provided by incumbent rail operators will invite new entrants (private companies as well as incumbent companies in other member states) to act as 'free riders' on the market without making any reasonable investment themselves. Such a systematic access could also backfire by putting an end to recent market initiatives developing throughout the EU. Regulatory control can help to overcome fears about discrimination as well as fears of abusive conduct on the market

Overall, CER believes that the recast of the first railway package should favour and facilitate innovative market investments which are of interest to all market players while, at the same time, supporting the creation of a European railway area.

Regulatory bodies – the guardians of fair competition

One of the reasons triggering the recast of the first railway package was the fact that many operators have complained that the package was not properly implemented. Some of these complaints have led the European Commission to launch formal investigation procedures against 13 member states. The European Court of Justice is expected to publish a ruling at the end of this year.

Beyond these disputes on the interpretation of European legislation, **it is essential to have strong and independent regulators throughout the EU** to which parties may complain if they feel that their activity is affected by another stakeholder. While the first railway package put into place rail regulators, in many cases their powers appear to be too limited and their independence relative.

The Commission proposes to reinforce these aspects. CER adds to the Commission's proposal that these regulators should co-operate closely with the existing competition authorities, which have a long-standing experience in dealing with anti-competitive behaviour, and should be at the heart of any discussion relating to market access to rail-related services.

CER believes that it is only under the supervision of a strong and independent 'policeman' that competition can develop in a fair manner in Europe. This policeman should however confine its activities to ensuring the law is applied and not meddle in companies' business activities.

Future outlook

The rail market has undergone many changes since the adoption of the first railway package. CER recently published a book describing the latest state of the market and the different models that coexist in Europe (see box). CER is convinced that diversity should be safeguarded as such as it does not prevent the creation of a European railway area.

The recast is undergoing its first reading in the European Parliament and in the Council. It is likely that both institutions will have opposing views on some of the key aspects of the text. CER will focus its activities in the coming year to ensure that the interests of the sector eventually prevail in the political arena. To feed into the discussion, on 24 May 2011, CER organised a debate with Debora Serracchiani (S&D, IT), the European Parliament rapporteur on the recast dossier. In any case, given its complexity and its impact on the sector, it is to be expected that this recast will take some time to unfold. CER will keep the recast on the top of its agenda.

New Reforming Railways – Learning from Experience – February 2011

This book gives a comprehensive overview of the state of play of reforms in the railway sector in different countries, inside and outside Europe. The sheer pace of reform and the fact that much of the material is only available in the national language make it difficult to keep up. These are just two reasons why, in 2011, CER invited distinguished national experts to write an overview on reforms within their countries for a second edition of this publication. The first version was published in 2005.

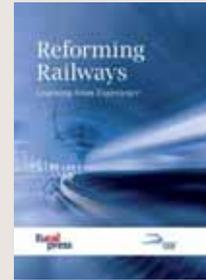
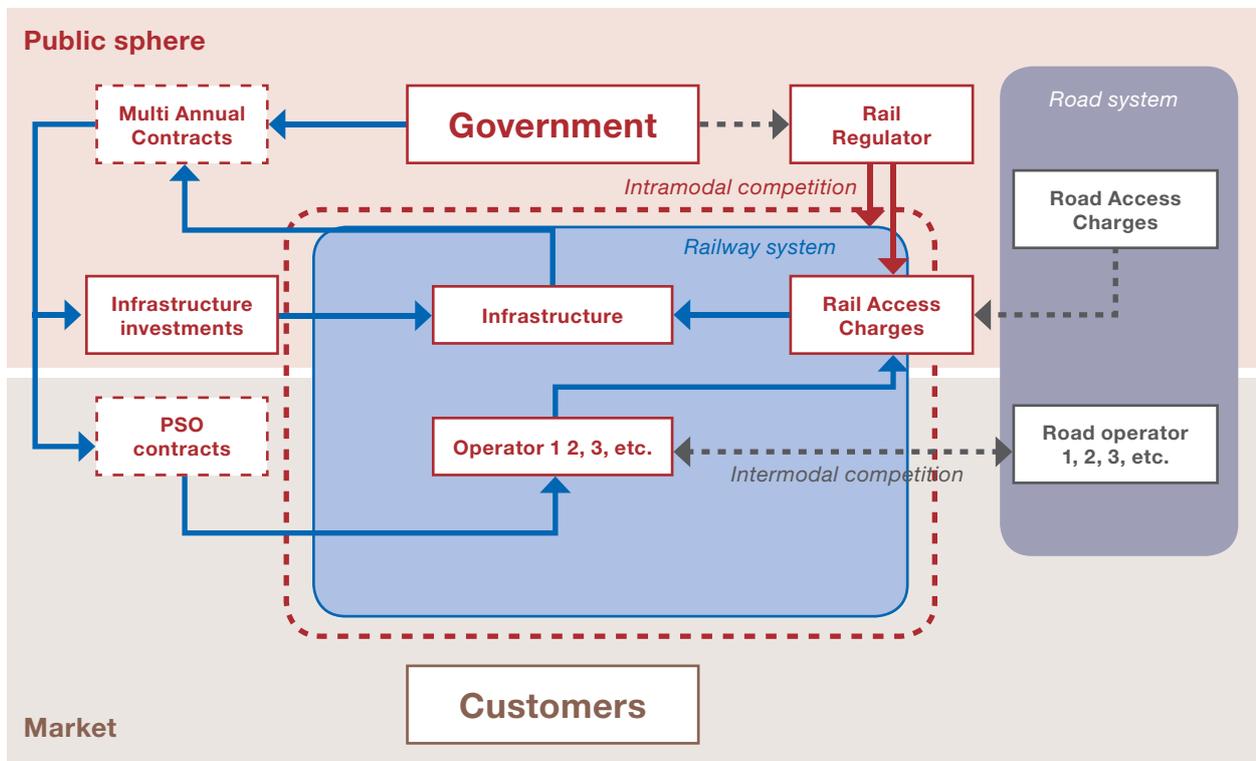


Figure 2: Functioning of the railway system



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Passenger needs are taken seriously by European railways

In 2010, rail passenger transport was marked by the implementation of the passenger rights regulation, and the opening of the international rail passenger market. But passenger transport was also affected by two crises: **the volcanic ash cloud in April 2010 and heavy snow falls last December**. These developments opened up new opportunities for railways to demonstrate how socially responsible they have been, and will continue to be.

On 3 December 2009, the rail passenger rights regulation (PRR) 1371/2007 entered into force, together with the regulation 1370/2007 on public service obligations. Both regulations **set up a European framework for the opening of the international rail passenger services starting on 1 January 2010**. The European Commission used this opportunity to express its views at a press conference. At the same time, CER underlined that European railways had started implementing passenger rights well before EU legislation came into force, and in many cases defining rights that go beyond PRR requirements.

An unbalanced European framework for passenger rights

In addition, passenger rights were also defined for the maritime (in 2007) and road (in 2010) sectors. While passenger rights are now defined in all modes, it is regrettable that **the legislation concerning the various transport modes is unbalanced**. For instance, the bus & coach passengers' rights regulation applies to services of at least 250km. This leaves a considerable number of bus services out of the requirements of the bus regulation, while equivalent rail services are applying the rail PRR. As a result, European passengers are not protected equally when travelling by rail or bus. Taking into account this new legislative framework, **rail remains the transport mode which guarantees the highest level of rights to travellers in Europe**.

Looking ahead, the European Commission intends to publish a Communication on passenger rights in all transport modes in autumn. This may open the way to a more uniform framework that would be easier to understand for passengers using different modes of transport.

Overall, the introduction of PRRs raised passengers' expectations regarding the transport sector in general. In addition, the two crises that affected the transport sector in 2010 – the ash cloud crisis and the snow fall crisis – triggered a debate in two

CER information session on ticketing in the European Parliament

On 16 November 2010, MEP Mathieu Grosch (EPP, BE) kindly invited CER to present the state of the art of current ticketing systems in the railway sector to representatives from the EU institutions. The meeting also aimed to set the basis for a sound and informed debate on a political level in the future. Presentations made during the conference are available in the press section at www.cer.be.

areas: ticketing and crisis management. In this context, railways, more than any other mode, must continue to demonstrate how seriously they take their responsibilities towards society.

Any ticket, for any destination, available anywhere?

From 16 to 28 April 2010, the ash cloud crisis paralysed the whole aviation sector, creating massive flows of stranded air passengers to railway stations. In order to help them, European railways made available more than 400,000 extra seats, extra information and assistance to passengers, as well as special phone numbers and price offers.

On 18 May 2010, following the ash cloud crisis, European Commission Vice-President Siim Kallas and several members of the European Parliament's Transport Committee recognised railways as a viable and effective alternative to air transport. They also expressed the wish to do more on interoperability, information provision and international ticket reservation systems, opening up the debate on ticketing.

Kallas' call was echoed in the following months by EU politicians who, since then, have raised the ticketing flag as the solution to enhancing passenger mobility in Europe.

Recent EU regulations at a glance

- Regulation 1371/2007 of the European Parliament and of the Council on rail passengers' rights and obligations
- Directive 2007/58/EC of the European Parliament and of the Council of 23 October 2007 amending Council Directive 91/440/EEC on the development of the Community's railways and Directive 2001/14/EC on the allocation of railway infrastructure capacity and the levying of charges for the use of railway infrastructure
- Regulation (EC) 1370/2007 of the European Parliament and of the Council of 23 October 2007 on public passenger transport services by rail and by road
- Regulation (EU) 1177/2010 of the European Parliament and of the Council of 24 November 2010 concerning the rights of passengers when travelling by sea and inland waterway
- Regulation (EU) 181/2011 of the European Parliament and of the Council of 16 February 2011 concerning the rights of passengers in bus and coach transport

Just the ticket

In order to respond to political expectations, on 16 November 2010 CER organised an information session in the European Parliament on ticketing, presenting the state of the art in cross-border and intermodal ticketing to high-level representatives of the European institutions. Contrary to what some may believe, cross-border ticketing and intermodal ticketing is widely used. In any case, CER is committed to continuing internal discussions about ways to develop the significant offer of cross-border and intermodal ticketing which already exists. Moreover, CER strives to conduct a regular dialogue with passenger associations and other interested parties to better understand customers' views.

The heavy snow falls that affected the transport sector in a number of European countries just before Christmas accelerated the internal discussions. High-level experts at CER are currently assessing various options for an industry initiative to further develop through-ticketing, in a way that fulfills the expectations of politicians and passengers, while making sense from an economic point of view.

But CER is concerned that ticketing may have blown into a much bigger issue than it actually is. **Cross- and intermodal ticketing on long-distance journeys represents less than 5% of the overall transport demand.** At the annual conference of the European Passenger Federation (EPF) in early March, CER noted that expectations and concerns from national passenger associations mainly focused on regional transport, notably in terms of frequency of services. In other words, the majority of passengers seem to be more concerned about how they commute between home and work every day whereas the demand for cross-border and intermodal ticketing appears to express the needs of a smaller share of the market.

Passengers always come first

The ash cloud and the snow fall crises not only triggered discussions on the availability of tickets, but also on the mobility of passengers in Europe. Whenever the transport sector faces a crisis, politicians expect rail to be a robust and reliable alternative to other modes, reinforcing the expectation that rail should remain an instrument of social cohesion.

After the ash cloud crisis, Vice-President Kallas requested an assessment of the contingency measures railways had taken to help stranded air passengers. As a short-term action, railways decided to put in place a procedure which allows the European institutions to be informed about contingency measures taken in case of a crisis. Moreover, the railways contributed to the European Commission's consultation on mobility at the end of last year. The results of the consultation were used as the basis of a Commission note sent to the Council¹ last November, which suggests reflecting on certain areas where progress could be achieved, among which is "the sharing and communication of relevant information".

In order to find long-term solutions, European railways are discussing internally how to enhance their co-operation so as to better handle future crises in the transport sector, with the ultimate goal of transporting passengers to their destination. CER has invited actors from the aviation sector to join the discussions and exchange views on how major future air crises can be handled.

Enhancing mobility: yes, but in a pan-European network

However, enhancing cross-border ticketing, on its own, is not relevant if the infrastructure that makes these tickets attractive is not available. Investments in infrastructure are necessary to complete the European high-speed network between, on the one hand, major European cities and, on the other hand, airports and main railway hubs.

Table 1: An unbalanced European framework for passenger rights

| | RAIL | AIR | SEA | ROAD |
|-----------------------------|--|--|---|---|
| LIABILITY FOR DELAYS | | | | |
| abandon / return + refund | <ul style="list-style-type: none"> ○ if expected delay of more than 60 minutes at (final) destination | <ul style="list-style-type: none"> ○ if denied boarding, cancellation or delay over 5 hours | <ul style="list-style-type: none"> ○ if expected cancellation or delay at departure more than 90 minutes | <ul style="list-style-type: none"> ○ if expected cancellation, overbooking or delay more than 120 minutes at departure |
| continuation / re-routing | <ul style="list-style-type: none"> ○ if expected delay at (final) destination of more than 60 minutes: <ul style="list-style-type: none"> - as soon as possible - at a later date at the passenger's convenience | <ul style="list-style-type: none"> ○ if denied boarding or cancellation: <ul style="list-style-type: none"> - as soon as possible - at a later date at the passenger's convenience | <ul style="list-style-type: none"> ○ if expected cancellation or delay at departure more than 90 minutes: <ul style="list-style-type: none"> - as soon as possible | <ul style="list-style-type: none"> ○ if expected cancellation, overbooking or delay at departure more than 120 minutes: <ul style="list-style-type: none"> - as soon as possible |
| compensation | <ul style="list-style-type: none"> ○ if delay at arrival between 60 and 119 minutes: 25% of fare actually paid for delayed service ○ over 120 minutes: 50% of fare actually paid for delayed service ○ 3 general grounds for relief: <ul style="list-style-type: none"> - "force majeure" - fault of the passenger - behaviour of third party (other RUs and IM are not considered as third parties) ○ 2 special grounds for relief: <ul style="list-style-type: none"> - passenger was informed before buying his/her ticket, - delay caused outside EU ○ no compensation under 4€ ○ payment within 1 month | <ul style="list-style-type: none"> ○ if involuntary denied boarding, cancellation or delay of more than 3 hours (based on case law <i>Sturgeon</i>): compensation of: <ul style="list-style-type: none"> - 250€ for flight <1,500km - 400€ for flight >1,500 <3,000km - 600€ for flight >3,000km ○ 1 ground for relief: force majeure | <ul style="list-style-type: none"> ○ 25% of fare actually paid for delayed service: <ul style="list-style-type: none"> - after 1 hour if journey <4h - after 2 hours if journey >4<8h - after 3 hours if journey >8<24h - after 6 hours if journey >24h ○ 50% of fare actually paid for delayed service: <ul style="list-style-type: none"> - after 2 hours if journey <4h - after 4 hours if journey >4<8h - after 6 hours if journey >8<24h - after 12 hours if journey >24h ○ grounds for relief: <ul style="list-style-type: none"> - fault of the passenger, - "weather conditions endangering the safe operation of the ship" - force majeure - passenger was informed before buying his/her ticket - no compensation under 6€ | <ul style="list-style-type: none"> ○ if expected cancellation, overbooking or delay at departure over 120 minutes and if continuation from terminal not provided, compensation of 50% of fare on top of refund ○ payment within 1 month |

¹ 'Strengthening the resilience of the European transport system: ensuring the uninterrupted mobility of passengers and goods in the event of a sudden transport crisis', briefing by the Commission to the Council 16879/10.

Source: Comité international des transports ferroviaires (CIT)

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Rail freight corridors: a new European regulation to finally build a pan-European network?

Regulation 913/2010 concerning a European rail network for competitive freight entered into force on 9 November 2010. With this, the European Commission aims to set out a framework for the establishment of international rail freight corridors. Will this Regulation on its own be able to fulfill the objective of creating a competitive rail freight network?

Regulation 913/2010 lays down rules for the establishment and organisation of international rail corridors for competitive rail freight, with a view to the development of a European rail network for competitive freight. The Regulation sets out rules for the selection, organisation, management and the indicative investment planning of freight corridors. CER is constantly advocating the importance of high-level political involvement in these procedures, notably through the organisation of corridor conferences at ministerial level.

First steps towards a rail freight corridor

According to the Regulation, member states should send a joint letter of intention to the European Commission, following consultation of the corridor's infrastructure managers and users. Besides the initial corridors defined in the annex (see table 1), the Regulation sets out criteria a corridor should meet. It also defines the corridor's governance structure:

- An executive board of the member states concerned, to approve the implementation plan;
- A management board of infrastructure managers, to draw up the implementation plan;
- Two advisory boards, one comprising railway undertakings using or likely to use the corridor, and one made up of terminal's owners and managers.

Existing structures (e.g. created for the ERTMS corridors) may be used.

One-stop shop: an ambiguous role

The management board's responsibility is to design or respectively set up the corridor's one-stop shop (OSS). The role of an OSS is to handle applications for international pre-arranged train paths for freight trains as well as capacity reserved for ad hoc requests. **Although CER recognises the role of the corridor's OSS, it fears that making its use mandatory for the application of a certain**

category of paths may be challenging. In fact, most railway undertakings will issue many applications in terms of preferred time slots, without knowing whether they are applying for pre-arranged, reserved, or unreserved capacity. In most cases, railway undertakings will ask for a path whose origin and destination are outside the corridor, which cannot be covered solely by the OSS. The Commission tried to clarify the complex interactions between the OSS and the other entities (railway undertakings and infrastructure managers) in a handbook to support the implementation of the Regulation (see figure 1) However, as CER has consistently advocated, it remains unclear how the OSS will cope with its ambivalent responsibilities in reality.

Nine initial corridors (see table 1) must be established by November 2013. Moreover, each member state with a rail link to another member state will have to establish at least one corridor.

Member states interested in but not concerned by the list of initial corridors can send a letter of intent to the Commission by 10 November 2012. The Commission then has nine months to assess the proposal. If the feedback is positive, member states will establish the corridor within two years following the Commission's decision.

The way forward

Besides the European top-down legislative approach, CER continues to promote its idea of arranging **ministerial conferences to mobilise transport ministries from member states involved in the respective corridor.** Meetings at ministerial level were encouraged and supported by CER throughout 2010. For example, one in Rotterdam on 14 June gathered together transport ministers from Belgium, Czech Republic, France, Germany, Italy, Lithuania, Luxembourg, the Netherlands, Poland and Switzerland on the three corridors in the Regulation annex (Corridors 1, 2 and 8). Here, ministers signed a declaration stressing

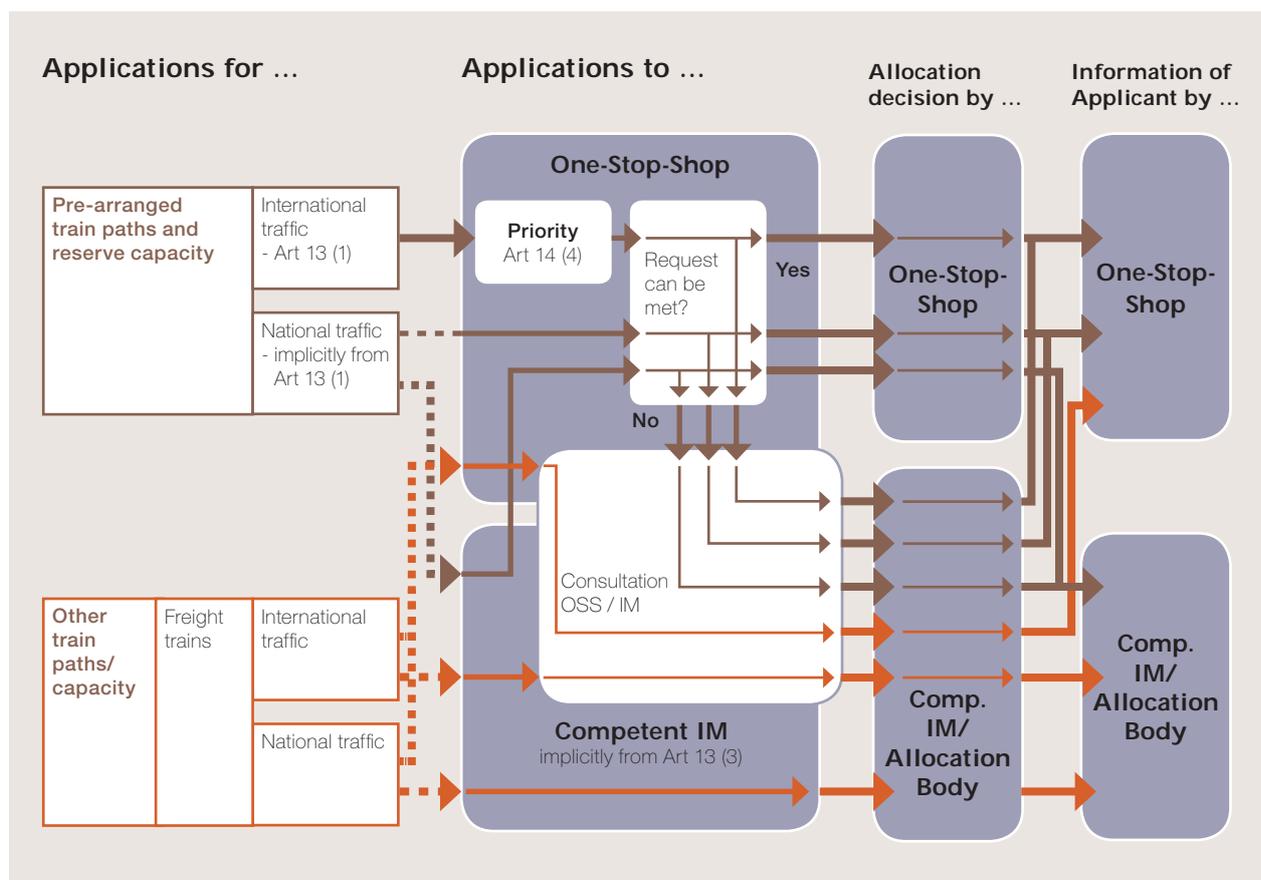
that “the development of rail freight corridors should be properly funded”. A follow-up conference on the same corridors will be hosted by Belgian Secretary of State, Etienne Schouppe in Antwerp on 27 June 2011. With specific reference to Corridor 1 from Rotterdam to Genoa, it is worth mentioning the involvement of European Commission Vice-President Siim Kallas who invited the transport ministers concerned to report on progress on interoperability at the margins of the Transport Council of 10 December 2010.

Representatives of transport ministries and infrastructure managers from Bulgaria, Czech Republic, Germany, Hungary, Romania and Slovakia and the European Commission met on 25 March in Prague for the Corridor 7 ministerial conference. CER’s Deputy Executive Director Libor Lochman participated as coordinator for interoperability (ERTMS) work on the corridor. Once again, ministers underlined and strengthened their common views by signing a memorandum of understanding.

CER welcomes and supports this continuous political follow-up by member state transport ministers directly concerned by a corridor. Together with EIM and RNE, CER organised the first Rail Freight Corridors conference on 6 May 2011. Infrastructure managers were invited to discuss practical steps for fulfilling Regulation 913/2010 and to share experience with existing corridors.

In the framework of a high-level corridor meeting on 14 June 2010 in Rotterdam, transport ministers from Belgium, Czech Republic, France, Germany, Italy, Lithuania, Luxembourg, the Netherlands, Poland and Switzerland signed a declaration stressing the fact that “the development of rail freight corridors should be properly funded”.

Figure 1: Role of the corridor One-Stop-Shop in processing applications for rail freight capacity



Source: European Commission Handbook on the Regulation concerning a European rail network for competitive freight

Table 1: List of rail freight corridors to be established initially, as in the annex to Regulation 913/2010

| | Member States | Principal routes ¹ | Establishment of freight corridors: |
|----|----------------------------|---|-------------------------------------|
| 1. | NL, BE, DE, IT | Zeebrugge-Antwerp/Rotterdam-Duisburg-[Base]/Milan- Genoa | By 10 November 2013 |
| 2. | NL, BE, LU, FR | Rotterdam-Antwerp-Luxembourg-Metz-Dijon-Lyon/[Base] | By 10 November 2013 |
| 3. | SE, DK, DE, AT, IT | Stockholm-Malmö-Copenhagen-Hamburg-Innsbruck- Verona-Palermo | By 10 November 2015 |
| 4. | PT, ES, FR | Sines-Lisbon/Leixões – Madrid-Medina del Campo/ Bilbao/ San Sebastian-Irun- Bordeaux-Paris/ Le Havre/Metz Sines-Elvas/Algeciras | By 10 November 2013 |
| 5. | PL, CZ, SK, AT, IT, SI | Gdynia-Katowice-Ostrava/ Žilina-Bratislava/Vienna/ Klagenfurt- Udine-Venice/ Trieste/ /Bologna/ Ravenna/ Graz-Maribor-Ljubljana-Koper/Trieste | By 10 November 2015 |
| 6. | ES, FR, IT, SI, HU | Almería-Valencia/Madrid-Zaragoza/ Barcelona-Marseille- Lyon-Turin- Milan-Verona-Padua/Venice-Trieste/ Koper- Ljubljana-Budapest-Zahony (Hungarian-Ukrainian border) | By 10 November 2013 |
| 7. | CZ, AT, SK, HU, RO, BG, EL | – Bucharest-Constanta Prague-Vienna/Bratislava-Budapest – Vidin-Sofia-Thessaloniki-Athens | By 10 November 2013 |
| 8. | DE, NL, BE, PL, LT | Bremerhaven/Rotterdam/Antwerp- Aachen/Berlin-Warsaw- Terespol (Poland-Belarus border)/Kaunas | By 10 November 2015 |
| 9. | CZ, SK | Prague-Horní Lideč-Žilina-Košice-Čierna nad Tisou (Slovak/Ukrainian border) | By 10 November 2013 |

¹ "/" means alternative routes. In line with the TEN-T priority projects, routes 4 and 6 should in the future be completed by Project 16, the Sines/Algeciras-Madrid-Paris freight axis which takes in the central Pyrenees crossing via a low elevation tunnel.

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New shape of TEN-T and the role of rail

The main objectives of the future TEN-T policy are to construct new infrastructure in the EU-12, and to make better use of the existing network in the EU-15 through modernisation, improving interoperability, upgrading, removal of bottlenecks, and construction of cross-border sections.

The European Commission has been planning the review of the trans-European Transport Network policy (TEN-T guidelines and TEN-T financial regulation) since 2009. The reasons for launching a review of the current TEN-T policy are mainly to integrate the networks of the new member states, and to bring TEN-T policy in line with the EU's commitment to decarbonise transport, and to climate change. In an attempt to create one single modern trans-European transport network, the Commission intends to move away from the current concept of more or less isolated priority projects.

The Commission revealed its first indicative thoughts on the definition of the future TEN-T network in a staff working document presented to the European transport ministers at the Council meeting in Hungary on 7-8 February 2011.

Future TEN-T guidelines

The future TEN-T policy is likely to focus on constructing new infrastructure in the EU-12 while making better use of the existing network in the EU-15. The comprehensive network will essentially reflect the existing and planned TEN-T network, but will be updated and adjusted to create missing

links and to modernise it. The **core network** will reflect the strategically most important parts of TEN-T and will be drawn up on the basis of a European planning methodology. The main criteria for planning this network include transnational traffic flows, territorial cohesion and economic development, spatial planning, environmental and climate change objectives, and connections to neighbouring countries.

The degree of 'European added-value', which refers to projects that are not sufficiently attractive to be financed by national governments, is expected to determine the eligibility of projects for EU co-funding. Likewise, **the impact of projects on the environment (measured, for example, by CO₂ emissions) is also likely to be a factor** in determining EU co-funding. There will be a much stronger focus on multi-modality (which we understand to mean that each mode is to operate on the market segment where it is most advantageous), and on creating better interfaces between modes, which the Commission hopes will lead to a more efficient and modern transport network.

Hopefully, CER objectives of **including high-speed lines and rail freight corridors in the core network** will be taken up by the Commission proposal.

Table 1: Financial perspective 2007-2013 (EURbillion)

| | Total | Road | Rail | Other* |
|--|-------|------|------|--------|
| TEN-T Budget | 6.7 | 0.3 | 4.4 | 2.3 |
| Cohesion Funds transport plans | 74.0 | 40.6 | 23.9 | 10.0 |
| - of which TENT-T | 36.9 | 17.4 | 18.4 | 1.1 |
| Total EU funds available for transport | 80.7 | 40.9 | 28.3 | 12.3 |
| - in percentage | | 51% | 35% | 15% |

Source: TEN-T EA January 2011; Cohesion Policy: Strategic Report 2010 (annex V)

* Airport, ATM, ERTMS, Galileo, ITS, IWW, MOS, Multimodal, Port, and RIS

Future TEN-T financial regulation

In order to finance this network, the Commission is proposing **to better coordinate available sources of financing** and to simplify their use. More specifically, it is planning to pool European and national, public and private sources of funding and financing. In this context, the Commission has started an in-depth analysis on how to better coordinate the Cohesion and Structural Funds with the transport policy objectives. It is also likely to propose greater reliance on private capital financing, such as EIB lending, PPPs and project bonds.

On the issue of funding, CER feels that **more weight should be given to environmental and safety criteria in the selection of EU-funded infrastructure projects from TEN-T and other EU funds**, such as Cohesion and Structural Funds, in order to rebalance the current distribution of EU funds among transport modes. For the financial period 2007-2013, rail will receive 35% of available EU funds, while the lion's share of over 50% will go to road infrastructure projects (see below).

According to the Commission's White Paper 'Roadmap to a Single European Transport Area', which was published on 28 March 2011, the completion of the TEN-T network will require about EUR 550 billion until 2020. To implement the future TEN-T policy and complete priority projects, a proper and adequate EU budget is a necessary precondition. CER believes that member states should be given more incentives to invest in transport infrastructure by increasing the EU co-funding rate for TEN-T projects and by raising the EU TEN-T budget in the next financial perspective 2014-2020.

Figuring out the funds

Whilst an analysis of TEN-T funds for the period 2007-2013 shows that rail receives about 65% of the total (EUR 4.4 billion of EUR 6.7 billion), the overview below also takes into account funds made available for transport through the Cohesion and Structural Funds, which are much more substantial. This more complete picture shows that **total planned EU investment in rail for 2007-2013** (including the TEN-T budget) was around **EUR 28.3 billion**, whilst **road** was to receive a total of around **EUR 40.9 billion**. For a more detailed overview of planned EU expenditure on infrastructure for the current financial period 2007-2013, please refer to Annex 5 of the Staff Working Document accompanying the European Commission's Strategic Report 2010 on the Implementation of the Cohesion Policy Programmes 2007-2013.

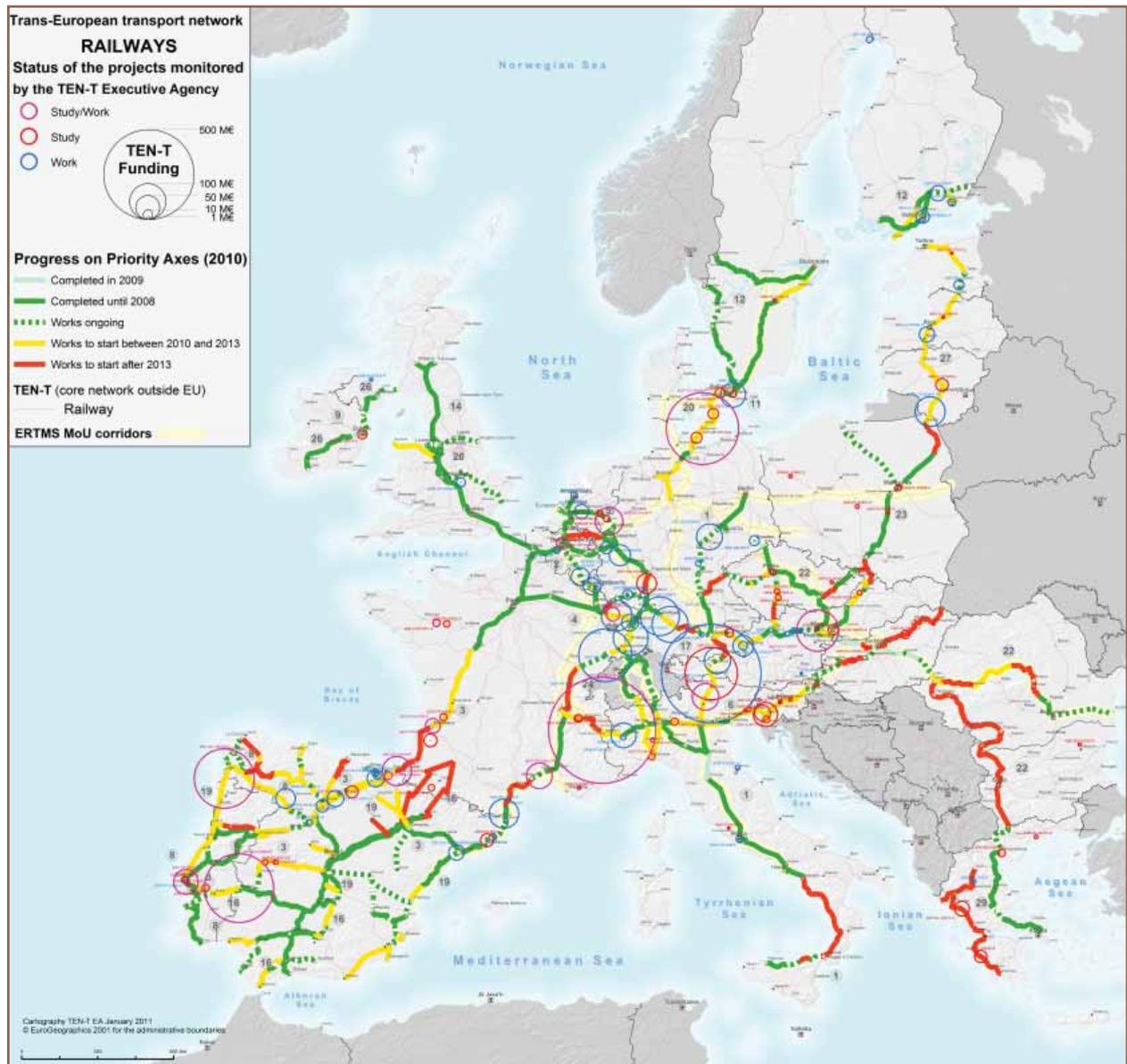
The new shape of TEN-T: will Europe bet on rail?

CER, together with the Hungarian Presidency and in co-operation with the EPP and the Green/EFA Group, invited experts from EU institutions and the rail sector to an event entitled 'The new shape of TEN-T: will Europe bet on rail?' on 13 April 2011. The event discussed rail's role in the future TEN-T policy and assessed the extent to which experts feel environmental and climate change objectives should be included in the network definition and selection of EU co-funded projects. The discussions highlighted the importance of integrating new member states' transport networks into the existing TEN-T network, and the need to find financing for this. The discussions revealed that possible solutions are closely linked to the full internalisation of external costs, as has been stated by CER for many years and has now been confirmed in the Commission's new White Paper on Transport.

Next steps

At the time of writing, the Commission's proposal on the new TEN-T guidelines is still being drafted. The new transport White Paper, which was published in March 2011, contains important elements that are being adopted in the new TEN-T guidelines. In the absence of any delays, the Commission's **proposal on the new TEN-T guidelines is expected to be published in late June/early July 2011**. The timing of the publication of the new TEN-T financial regulation depends on the publication of the multiannual financial framework (MFF), which will determine the size of the transport budget for the upcoming financial period. The MFF is expected to be published by the end of June 2011. All major funding proposals, including TEN-T (as well as Structural Funds, Cohesion Funds, etc.) should be published shortly after this date.

Figure 1: Trans-European transport network - Railways



PRIORITY AXES

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| <ol style="list-style-type: none"> 1. Railway axis Berlin-Verona/ Milano-Bologna-Napoli-Messina-Palermo 2. High-speed railway axis Paris-Bruxelles/ Brussels-Köln-Amsterdam-London 3. High-speed railway axis of south-west Europe 4. High-speed railway axis east 5. Betuwe line 6. Railway axis Lyon-Trieste-Diva a-Ljubljana-Budapest- Ukrainian border 8. Multimodal axis Portugal/Spain-rest of Europe 9. Railway axis Cork-Dublin-Belfast-Stranraer (completed 2001) 11. Öresund fixed link (completed 2000) 12. Nordic triangle railway/road axis 14. West coast main line 16. Freight railway axis Sines/Algeciras-Madrid-Paris 17. Railway axis Paris-Strasbourg-Stuttgart-Wien-Bratislava | <ol style="list-style-type: none"> 19. High-speed rail interoperability on the Iberian peninsula 20. Fehmarn Belt railway axis 22. Railway axis Athina-Sofia- Budapest-Wien-Praha-Nürnberg/ Dresden 23. Railway axis Gdansk-Warszawa-Brno/Bratislava-Wien 24. Railway axis Lyon/Genova-Basel-Duisburg-Rotterdam/ Antwerpen 26. Railway/road axis Ireland/United Kingdom/continental Europe 27. "Rail Baltica" axis Warszawa-Kaunas-Riga-Tallin-Helsinki 28. "Eurocaprail" on the Bruxelles/Brussel-Luxembourg- Strasbourg railway axis 29. Railway axis of the Ionian/Adriatic intermodal corridor |
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Source: TEN-T EA, January 2011.

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A Single European Railway Area

Over the past year, co-operation between ERA and CER proved fruitful yet again. A number of crucial activities were successfully completed. For example, the first set of TSIs for conventional rail has been finished. Major clarifications about the vehicle authorisation process were provided by the European Commission and ERA. Looking ahead, work on the revision of TSI, which has just started, will continue during 2011.

In 2010, member states had to bring into force the laws, regulations and administrative provisions necessary to comply with the revamped Safety Directive (2008/110) and the new Interoperability Directive (2008/57). These directives significantly modify the approach for the subsystem, in particular vehicle authorisations and defining the new body and its responsibility – that is, the entity in charge of maintenance.

Co-operation boosted with ERA

Over the past year, **CER improved its already close co-operation with the European Railway Agency (ERA) in a number of areas.** In every ERA working group, CER plays a leading role in supporting the ERA drafting process. This is done by nominated CER speakers, acting on behalf of the CER community, sent to related ERA working parties and coordinated by the CER technical team.

The extent of ERA activities has been steadily growing. Thanks to the tripartite agreement, the Coordination Technical Group of CER and EIM, supported by UIC, has developed its activities to coordinate the increased demand for technical resources and related synergies.

Moreover, for the first time, the sector was asked to provide an official opinion about the agency's performance. In the second half of 2010, the European Commission launched a study to evaluate the agency's tasks, as requested by Regulation (EC) 881/2004, article 43.

Together with other stakeholders, **CER appreciates ERA's achievements over the last five years, but notes that there is still potential for improvement,** in particular regarding better coordination of interfaces and more transparency in decision-making.

As to the agency's future role, further extensions include carrying out type approvals and certifications (including ERTMS), certification of infrastructure managers and

“Five years after the Agency [ERA] takes up its duties, the Commission shall carry out an evaluation of implementation of this Regulation, the results obtained by the Agency and its working methods. This evaluation shall take account of the views of the representatives of the railways sector, of the social partners and of customers' organisations. The findings of the evaluation shall be made public. The Commission shall propose, if necessary, an amendment to this Regulation.”

Regulation (EC) 881/2004, article 43

railway undertakings, supervision, audit and inspection of National Safety Authorities' (NSAs) administrative capacity, dissemination of railway-related training, and information and monitoring the implementation of legislation.

CER continues its efforts to get closer to the Railway Interoperability and Safety Committee (RISC) discussions. Regrettably, RISC members still refuse the right of attendance at the RISC sessions by stakeholders active in the railway business. Nevertheless, in previous months we have seen a positive tendency to arrange specific workshops attached to RISC meetings for important ERA recommendations, once they have been finalised. These workshops provide a good opportunity for CER to express support or concerns directly to member states representatives

TSIs update

In 2010, the first set of conventional rail Technical Specifications for Interoperability (TSIs) was completed with the help of technical and financial CER experts. It covers areas such as infrastructure, energy, locomotives and

passenger carriages, telematics applications, and operation. Following the so-called 'scope extension mandate' given to the ERA in April 2010 by the European Commission, the agency launched a number of studies dealing with TSI structure, Interchangeable Spare Parts (ISP), the energy billing system, etc. In addition, new working parties have been set up by ERA for each of the TSIs. In 2011 and 2012, CER experts will actively support ERA in closing open points, removing inconsistencies between requirements of high-speed and conventional rail TSIs, and defining appropriate requirements for the extended scope.

Training centres for train drivers

As regards training and education, the two main activities were the Accreditation system for Training Centres of Drivers and the Vocational Competencies & Driver Licence. The first, which started in 2007, delivered a recommendation at the end of 2010 to member states represented in the Railway Interoperability and Safety Committee (RISC). The second one, dealing with the implementation of European Directive 2007/59 on certification of train drivers, concentrated on topics like the "system for uniform criteria regarding examiners and examinations", and will continue in 2011 with issues such as "language requirements for train drivers", "Registers and Smart Card for licence and certificate", and "Physical requirement for drivers".

Safety is high on the agenda

According to the Safety Directive 2004/49/EC, ERA will submit recommendations on a strategy for migration towards a single Community safety certificate to facilitate cross-border operation. To that end, several groups have been and will continue to work on necessary tools and processes, such as Safety Management System (SMS) guidelines, Common Safety Methods (CSM) on Risk Acceptance (to provide a harmonised framework for assessing significant changes to be used especially in the risk assessment management process of SMS operators) or CSM on Monitoring (to harmonise safety monitoring methods for the railway sector).

A new group has also been set up to monitor safety performance through the common safety indicators (CSI) and the evaluation of the performance through the common safety targets (CST). A new regulation on a system of certification of entities in charge of maintenance (CECM) for freight wagons was agreed by RISC at the end of 2010.

Coordination Technical Group (CTG)

The CTG consists of technical experts from CER and EIM (supported by UIC Europe). Its objective is to coordinate the technical expertise of the participating railway associations in order to reduce costs for companies, to improve the definition of joint positions related to the ERA Work Programme, and to avoid a duplication of work. Five permanent CTG coordinators (including two from CER) are constantly working to that end.

CER Technical Monitor

To enable a better control and understanding by its members of all activities related to the European Railway Agency (ERA), CER introduced the *CER Technical Monitor* at the beginning of 2010. This news service delivers updated information monthly on the status and progress in each of the groups lead by the ERA.

Improving vehicle authorisation processes

The current process of railway vehicle authorisation has been identified as a major disadvantage for rail compared to other modes of transport. With the strong support of CER members, in 2010 the ERA collected data on national authorisation processes and cost-driving parameters. A comparison with other transport modes shows that even if the legislation, actors and procedures differ, the principle of mutual recognition of approved types, certifications, and checking bodies is widely established for air, road and maritime (within the EU and internationally) but is still in its infancy for rail at European level.

To improve this situation, the European Commission and the ERA issued an implementing recommendation as a common understanding about the authorisation for putting structural subsystems and vehicles into service under Directive 2008/57/EC. The document, called DV29 and now published as Commission Recommendation 2011/217/EU, will be used by the Commission for assessing the transposition of Directive 2008/57 into national law. CER carried out internal consultations which resulted in CER position papers; it appreciates the results of the DV29 and encourages the Commission and ERA to carry on with such consultations to clarify roles, tools and responsibilities for those issues of vehicle authorisation, operation and maintenance not covered by DV29.

Bringing clarity to national technical rules

Moreover, in 2010 CER members supported the NSAs in collecting and making transparent all the national technical rules applied by the member states for placing vehicles in service, according to article 27 of the Interoperability Directive. A first draft of these national technical rules, the so-called ERA Reference Document, is now available on the ERA website. 2011 will see the formal publication of the ERA Reference Document, the transition into an ERA Reference Document Database and the cleaning up of superfluous national technical rules. The latter requires the strong support and involvement of CER experts.

What next

In addition to the above-mentioned procedures, in which CER is playing a leading role, **CER is actively involved in the Network of Representative Bodies (NRB)** which brings together ERA's top management and all railway representative bodies for the coordination of these activities.

CER, jointly with UNIFE, proposed a number of activities which ERA should be in charge of **in order to contribute to the creation of a Single European Railway Area:**

- A strong role for the ERA in the coordination of the activity of the NSAs; this should go as far as the right of audit of the way in which the NSAs manage the safety of their national railway systems and a direct right of appeal to the ERA.
- A true European-type authorisation for vehicles, granted by the ERA in the form of an inscription in the European Register of Authorised Types of Vehicles (ERATV).
- A process of quick and regular revision of the TSIs and other rail regulations.
- The progressive elimination of unnecessary and superfluous national rules.
- A quick extension of the geographical scope of the rolling stock TSI.
- Wider use of the Interoperability Constituent (IC) concept and its extension to safety critical constituents.

- Better identification of the roles of the actors in the assurance of safety through maintenance.
- Contributing in the strategic planning and budgeting of European Commission funded research for better interoperability of the system.
- Ensuring better coherence with environmental Directives and regulation in terms of technical requirements and application rules.
- Better representation of the sector associations in meetings of the Railways Interoperability and Safety Committee in the following way: participation in non-decisional workshops and an observer role in decisional/voting sessions.

These activities will inevitably lead to the necessity for CER to make a greater contribution. This challenge cannot be met without significant involvement of experts from CER member companies.

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Promoting social dialogue

CER members build on more than 1 million employees taking the business a step further every day. When promoting adaptability to fast-changing market conditions, companies rely on workers' commitment and thus have to create more and better quality jobs to attract and keep their employees.

The creation of quality jobs involves offering decent wages, achieving a better work-life balance, imposing high health and safety standards, fostering equal opportunities, as well as developing lifelong learning policies.

The demographic change is also becoming an increasingly important issue for human resources managers throughout Europe. The rail sector, like other industries, is experiencing an increase in the average age of its personnel. The average age of workers in European railway companies is constantly rising and, as a result, opportunities for early retirement, as in previous years, will decrease. Moreover, **employees will have to continue to educate themselves** in light of their professional prospects. In the context of global competition, it will also become increasingly important for companies to be able to retain highly qualified staff on a long-term basis.

A changing workforce

The European Social Dialogue Committee for Railways has taken up the issue via a project entitled 'Employability in the Demographic Change'. Over two years, a working party organised **several workshops to discuss concerns and solutions linked to an ageing workforce.**

The project's final conference was organised in Brussels on 7 October 2010. Representatives of the European Commission, the European Parliament as well as 120 delegates from railway undertakings, infrastructure managers and trade unions from 20 different European countries discussed the impact of the demographic change on the European railway sector and presented good practice examples of how to promote individual and organisational employability. As a result, **a guide was published including more than 30 examples of good practice in the railway sector.**

Dialogue with social partners

On another front, CER **continued its co-operation with the European Transport Worker's Federation ETF.** A joint working group conducted an analysis on the implementation

of working conditions of mobile staff in cross-border services, as outlined in a CER-ETF agreement (now Directive 2005/47/EC). The analysis aimed to identify critical aspects and needs reported by companies and trade unions in relation to the development of interoperable cross-border transport. The group also evaluated initial experiences resulting from the implementation of provisions of the existing agreement.

The agreement states a daily rest away from home must be followed by a daily rest at home. With longer international routes, resulting partly from the complete opening of the rail freight market, it may be necessary to use the same train drivers for more than two rests away from home. This is why, back in 2006, CER asked for a limited extension of this clause. Unfortunately, negotiations with ETF failed in 2009. The European Commission, which must report to the Council on the implementation of the Directive, asked CER and ETF to launch a common study on this. As the social partners' positions have not changed since the discontinuation of negotiations, CER asked the Commission to launch the study alone and to follow railway market developments. Based on the results of this study, which began in April 2010, action should be taken to allow cross-border rail freight traffic to develop further. This means the flexibility of railway mobile staff must be increased through normal European legislative procedures.

Equal opportunities

Another joint CER and ETF project concerns the **'Joint Recommendations for a better representation and integration of women in the rail sector'**, signed in June 2007. The railway business is traditionally a 'male dominated sector'. However, there are significant differences among European countries as regards women's employment share and their areas of deployment. In general, there is serious under-representation of women in the European railway enterprises' workforce. The European social partners are pursuing better representation and integration of women in this sector, **basically supporting equal opportunities** and taking into account demographic developments and the sector's attractiveness to women.

In 2011, a follow-up project was set up to monitor the implementation of measures introduced to date, as well as to jointly evaluate implementation of the recommendations. On the basis of this, further actions, such as common objectives for the future, maybe envisaged.

New programme

An improved, but realistic social dialogue is important to prevent social conflicts, and a coordinated approach is the first necessary step. That is why several working parties have been created by CER's human resources directors to emphasise various important topics: staff protection when rail operators change; human resources are core to modern management; and corporate social responsibility is a timely and well-known issue, as is the promotion of health and safety.

Employability in the Face of Demographic Change - Prospects for the European Rail Sector

This guide presents more than 30 examples of good practice, addressing the issue of demographic change and employability among European railway companies. These actions centre on the areas of recruitment and education, further education and qualifications, health promotion and appropriate working conditions for the various life phases.

[http://www.cer.be/media/2114_1295603375_Employability-guide-EN\[1\].pdf](http://www.cer.be/media/2114_1295603375_Employability-guide-EN[1].pdf)



Final report of the Joint Study on implementation of the CER-ETF Agreement on Working Conditions.

This joint study was carried out by the European rail social partners (CER and ETF) in 2009. The final report was approved by the European Social Dialogue Committee for Railways in May 2010.

http://www.cer.be/images/Extranet/Social_Affairs/ESDCR_Working_Conditions/report%20en%20published.pdf





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Transport White Paper: Blueprint for a rail-friendly future?

The European Commission published the much-awaited new White Paper ‘Roadmap to a Single European Transport Area – Towards a competitive and resource efficient transport system’ on 28 March 2011. CER strongly welcomes the Commission’s long-term goals for Europe’s transport system.

The Commission sets the overarching goal of reducing greenhouse gas emissions from transport by 20% on the 2008 level by 2030 and by 70% of the 2008 level by 2050. This is equivalent to +8% on the 1990 level by 2030 and to –60% on the 1990 level by 2050. Overall, this constitutes a welcome and ambitious vision particularly for the latter part of the period. Concretely, the White Paper defines 10 goals for Europe’s transport system (see box) which are consistent with the emission targets. These goals offer rail a wide scope for playing a major role in Europe’s future transport system – in particular in terms of long-distance freight and intermediate-distance passenger travel, especially high-speed rail. For both of these segments the Commission advocates a shift away from road in favour of rail and inland waterways. CER strongly welcomes these targets and would like to play its full part in helping to ensure they are met.

Making sure that adequate policy instruments are put in place to drive forward the necessary structural changes identified in the White Paper is under continual scrutiny by CER. In the run-up to the publication of the White Paper, CER approached numerous Commission officials in order to explain the need for targets to be made binding through the use of financial instruments. It has long been CER’s belief that effective public policy rests upon creating the right economic framework conditions, in particular in terms of prices and infrastructure investment, as well as regarding adequate regulation of the rail sector itself.

Removing price distortions

CER welcomes the Commission’s commitment to full and mandatory internalisation of external costs for road and rail transport, including congestion. As regards greenhouse gas emissions, CER continues to advocate the introduction of a binding target for emissions from surface transport, to be made operational through the use of a separate cap-and-trade system (separate emissions trading system) similar to the existing EU ETS. It is CER’s belief that such an instrument would be preferable to other solutions, such as taxation or infrastructure charging.

New ways to attract investment

From the strategic point of view, CER is pleased to see that the Commission has endorsed a concrete vision for a multi-modal transport system. In particular, the Commission advocates the connection of core network airports and core seaports to the rail network.

In terms of investment flows, CER welcomes the Commission’s recognition that transport infrastructure generates positive externalities which justifies some level of state funding. In addition, among its proposed initiatives the White Paper outlines a proposal to “create a framework for earmarking revenues from transport for the development of an integrated and efficient transport system”, whilst also committing to the polluter-pays and user-pays principles. While much work remains to be done in the crucial area of infrastructure investment, CER believes that the proposals laid out in the White Paper offer a sound basis for further policy proposals. The goals defined in the White Paper require substantial investment for new rail infrastructure. However, CER believes that such investments can yield strongly positive social returns, all the more so in the context of the full internalisation of external costs.

In parallel, CER notes the Commission’s efforts to attract a higher share of private capital into rail infrastructure financing, notably thanks to a greater recourse to private-public partnerships and to the use of EU Project Bonds. CER will work constructively with the Commission in order to ensure that these instruments and initiatives can be applied to concrete rail projects.

Towards a Single European Railway Area

CER has a long tradition of supporting market opening and competition within the rail sector and welcomes the next major step in that direction, namely the liberalisation of domestic rail passenger services. CER also warmly welcomes the White Paper’s commitment to better technical regulation for rail vehicle authorisation and safety standards, and to a

Decarbonising transport: the role of rail

On 12 October, CER together with the Belgian Presidency organised a symposium about the crucial role that railways can play in the decarbonisation of transport. Mr Etienne Schouppe, Belgian State Secretary for Mobility, and Belgian MEPs Saïd El Khadraoui (S&D, BE) and Mathieu Grosch (EPP, BE) contributed with their high-level expertise alongside senior officials from the European Commission and relevant Commissioner Cabinets, as well as experts from the independent sector and academia.

More information in the press section of www.cer.be.



Etienne Schouppe, Belgian State Secretary for Mobility with Jacqueline McGlade, Executive Director of the EEA

stronger role for the European Rail Agency (ERA). CER also notes the Commission's intention to ensure effective and non-discriminatory access to rail infrastructure and to rail-related services by proposing options for structural separation. CER appreciates the Commission's proposal that the preferred options should ensure competition, investment and efficiency. Last but not least, CER welcomes the Commission's reflections on how to better manage international freight corridors. This is an important strategic issue for the development of long-distance rail freight and CER stands ready to inform and help the Commission find effective solutions.

Call for effective implementation

The new Transport White Paper lays out an ambitious vision for Europe's transport system in general and for the rail sector in particular. CER very much welcomes the Commission's clear goals for 2030 and 2050, and fully endorses them. Of course, **several crucial elements for the implementation of these goals have yet to be developed**. For its part, CER commits to working very closely both with its own members and with the Commission in order to ensure that adequate policy instruments are put in place. If that process is successful, then CER believes that rail will be able to fulfil its true potential.

The White Paper's selected goals

- (3) 30% of road freight over 300 km should shift to other modes such as rail or waterborne transport by 2030, and more than 50% by 2050, facilitated by efficient and green freight corridors. To meet this goal will also require appropriate infrastructure to be developed.
- (4) By 2050, complete a European high-speed rail network. Triple the length of the existing high-speed rail network by 2030 and maintain a dense railway network in all Member States. By 2050 the majority of medium-distance passenger transport should go by rail.
- (5) A fully functional and EU-wide multimodal TEN-T 'core network' by 2030, with a high quality and capacity network by 2050 and a corresponding set of information services.
- (6) By 2050, connect all core network airports to the rail network, preferably high-speed; ensure that all core seaports are sufficiently connected to the rail freight and, where possible, inland waterway system.
- (8) By 2020, establish the framework for a European multimodal transport information, management and payment system.
- (10) Move towards full application of "user pays" and "polluter pays" principles and private sector engagement to eliminate distortions, including harmful subsidies, generate revenues and ensure financing for future transport investments.

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Towards a full and mandatory internalisation of externalities

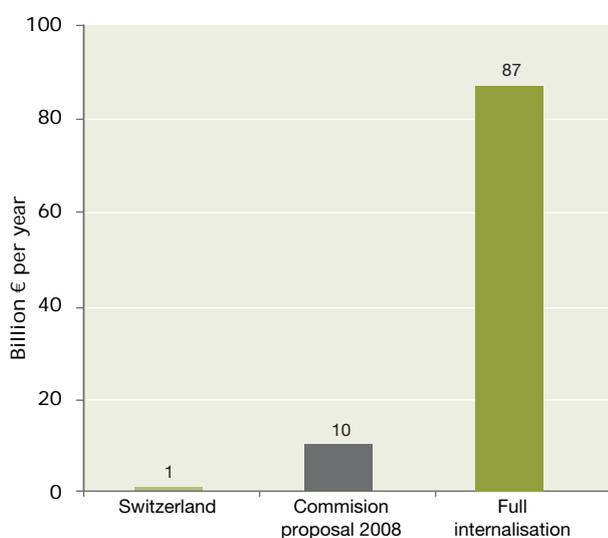
A wider application of the ‘polluter-pays’ principle is crucial for sending the right price signals and bringing about structural changes to achieve a more sustainable European transport system. The 2011 Transport White Paper recognises the importance of proceeding towards a **full and mandatory internalisation of external costs** to level the playing field between transport modes.

CER has long been advocating the importance of transport prices to reflect external costs. The promotion of measures to reflect the full environmental costs in the price of transport is crucial for sending out the right price signals from the market and introducing the structural changes needed to achieve a sustainable transport system.

Reflecting the external costs in transport prices also translates into a constant flow of revenue that can be used to finance future transport investments - particularly important in a period of budgetary constraints. If all the EU-27 member states implemented the Eurovignette Directive based on the **2008 Commission proposal, EUR 10 billion** could be raised.

The graph highlights the amount of potential revenue that internalisation of external costs might bring if applied throughout Europe.

Figure 1: Internalisation of external costs - potential revenue



Source: CER calculation

Eurovignette

The proposal to review the Eurovignette Directive (1999/62) is a step in the right direction as it will finally open up the possibility for member states to put the polluter pays principle into practice in the freight transport sector, giving them the possibility (but not the obligation) to internalise some of the external costs of road freight, in particular air pollution and noise.

However, the likely outcome of the negotiations between Parliament and Council is a weak text, following the Council's first reading position, adopted in October 2010. Key changes introduced by the Council include removal of the proposals to charge for congestion, removal of compulsory earmarking for external costs, and exemptions for vehicles based on exhaust emissions and permissible load. A final agreement is expected in 2011. The proposal will be three years old in July 2011, so it is increasingly important that a final agreement on Eurovignette can be reached as soon as possible to enable any agreed changes to be implemented and consideration given to the next stage of development.

Full and mandatory internalisation by 2020

The recently published Transport White Paper also recognises the importance of proceeding to the full and mandatory internalisation of external costs in all modes to ensure a level playing field for competing transport modes and the generation of revenues to finance future transport investments.

Building on the current revision of the Directive, CER will advocate that **the next stage of revision of the Eurovignette Directive reflects the goals included in the 2011 White Paper for the period 2016-2020, namely to proceed to the full and mandatory internalisation of external costs (including congestion) for road and rail transport.**

Interview: Toni Aschwanden, responsible for international transport policy at the Alpine-Initiative

The new Gotthard Base Tunnel is the longest in the world – who is it for?

The 57km-long Gotthard base tunnel will be the most important part of the north-south railway axis through Switzerland, and its opening in 2016/2017 will complement the 34-km long Lötschberg base tunnel, in service since 2007. The Swiss people, who demanded a shift of freight transport from road to rail, decided on it in several popular referendums. Not only freight transport will benefit: the travel time for passenger trains between Zurich and Milan will be reduced by 40 minutes down to three hours.

What are the practical implications of these tunnels for Europe?

Switzerland is offering and financing two very fast and reliable north-south connexions for Europe. It is very important that we ensure that the railway infrastructure that is built right now will operate at full capacity in the future. This includes the completion of the access lines in Germany and Italy in time for the opening of the tunnel.

How was the tunnel funded?

The construction of the tunnel is funded by the Swiss public transport fund that is mainly fed by the kilometre-based heavy vehicle fee (HVF). Its aim is to internalise the external costs of trucks and therefore implement the polluter-pays principle. It is calculated on the basis of total weight, emission level and kilometres driven, and every truck over 3.5 tonnes driving in Switzerland has to pay it. The annual revenue of about EUR 1 billion goes to the public transport fund. Currently, a 40-tonne truck pays about EUR 200 for a 300km journey across the country.

What effects has the Swiss HVF had on road and rail?

The heavy goods vehicle fee has had positive effects. We have fewer trucks driving empty, a better capacity use and a cleaner vehicle fleet. However, the effects were diluted by the acceptance of 40-tonne trucks instead of 28-tonne lorries, a result of the bilateral transport agreement with the European Union. Nevertheless, calculations from the Swiss authorities show that without the HVF and other measures, such as the support for combined traffic, there would be several hundred thousand more trucks on Alpine roads. Also, the HVF has strengthened the railways by raising their competitiveness, and they benefit from the modernisation of the rail network.

What lessons can the rest of Europe learn from the HVF?

The Swiss heavy vehicle fee could be an inspiration for European decision-makers on the internalisation of external costs. It shows that road charging is working, and is accepted by the population. Our economy is still among the most competitive economies in the world, despite the fear campaign by the road transport lobby who predicted a downturn when the introduction of the HVF was being discussed.



What future developments are planned in Switzerland?

An effective infrastructure and the HVF are of course important tools. However, we think that the 'hardware' of the Gotthard Base tunnel needs to be accompanied by intelligent 'software' to protect the sensitive region of the Alps. To really deliver the modal shift and a reduction in the number of trucks through the Alps down to 650,000 per year - as demanded by the Swiss population – we need the implementation of an Alpine Crossing Exchange, a cap-and-trade system for trucks crossing the Alps. In-depth studies on this are being carried out, and the issue will be considered by the transport ministers of the Alpine countries at their meeting in 2012.

The Alpine-Initiative has a central role in the progressive Swiss freight transport policy. The organisation seeks to protect the sensitive Alpine region from the effects of transit traffic and achieve a long-term transfer of freight from road to rail. These aims were incorporated into the Swiss constitution in 1994, following a successful national referendum on the issue. The organisation strives to ensure that the authorities implement the Swiss people's will and also promotes a more sustainable transport policy all over Europe. www.alpine-initiative.ch

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Strategy to lower rail impact on climate

As EU policies to tackle climate change increasingly focus on actions towards 2050, CER members have agreed a medium- and long-term plan for the rail industry that fits in with wider policy objectives. **The strategy outlines how the rail sector should be performing in environmental terms in 2030 and 2050**, and builds on the commitment already made to reduce CO₂ emissions from rail traction by 30% over the 1990-2020 period.

The need for **firm, coherent, and long-term policies** to reduce greenhouse gas (GHG) emissions in EU countries, as part of the global attempt to reduce the impact of climate change, remains a high priority at EU level. Following agreement of the Union's Climate and Energy Package in 2008, which set an EU-wide target of a 20% reduction in 1990 levels of greenhouse gas emissions by 2020, the Union made clear the need to continue moving forward, and set medium- and longer-term targets for emission reductions. An 80-95% target for 2050 was agreed by the Environment Council in October 2009, and the Europe 2020 strategy further promised a more "resource efficient Europe" by 2020 that will decouple economic growth from the use of resources, support the shift towards a low-carbon economy, increase the use of renewable energy, modernise the transport sector, and promote energy efficiency. The publication of the 'Roadmap for moving to a low-carbon economy in 2050' by the European Commission, in March 2011, set clear targets for all sectors of the economy for 2030 and 2050 to show how this long-term overall target could be reached - including, for the first time, a reduction target for transport.

Certainly, the **environmental impact of transport has also become of increasing concern over the last decade**, in particular due to the continuing growth in transport's CO₂ emissions. This has happened despite technological improvements to help reduce the impact of transport.

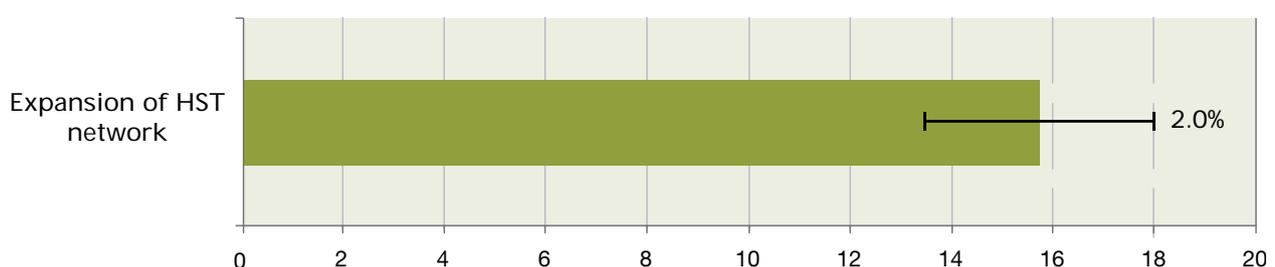
The severity of the current situation is illustrated by the European Environment Agency (EEA) which estimated that, on current trends, by 2050 the transport sector's projected emissions would be more than the total emissions target for all the sectors combined in Europe (see figure 2).

Potential of rail

In this context, rail already has the capability to play an increasingly important role in any sustainable transport system, as it is able to **offer quick, efficient transport with low environmental impact**. The environmental benefits the rail sector could offer would be increased considerably if modal shift was encouraged from higher-emitting transport modes, in particular aviation and road freight, to cleaner modes such as rail. Through the use of mechanisms such as the polluter-pays principle and the internalisation of external costs, modal shift to rail along with innovative co-modality concepts can help offer sustainable solutions that can be easily implemented without requiring technological improvements to be developed first.

However, despite the rail sector's existing environmental advantages over other modes, and the miniscule amount of CO₂ emissions from transport – less than 2% – it is responsible for, the sector is aware of the need **to continue to improve its own environmental performance**. In 2008, following analysis of data supplied

Figure 1: GHG reduction as a result of the increase in high-speed rail transport and a decrease in road and air transport (2020, Mtonnes CO₂ eq.) in EU-27



Source: Potential of modal shift to rail transport, Delft, March 2011.

Key targets included in the sustainable mobility strategy

Climate protection

By 2030, the European railways will:

- Reduce their specific average CO₂ emissions from train operation by 50% compared to base year 1990;
- Will not exceed the total CO₂ emission levels from train operations in absolute terms, even compared to base year 1990.

By 2050, the European railways will strive towards carbon-free train operation, and provide society with a climate-neutral transport alternative.

Energy efficiency

- By 2030, the European railways will reduce their specific final energy consumption from train operations by 30% compared to the base year 1990.
- By 2050, the European railways will strive towards halving their specific final energy consumption from train operation by 2050 compared to the base year 1990.

Exhaust emissions

- By 2030, the European railways will reduce their total exhaust emissions of NO_x and PM₁₀ by 40% in absolute terms compared to base year 2005.
- By 2050, the European railways will strive towards zero emission of nitrogen oxides (NO_x) and particulate matter (PM₁₀) from non-electric trains by 2050.

Noise and vibrations

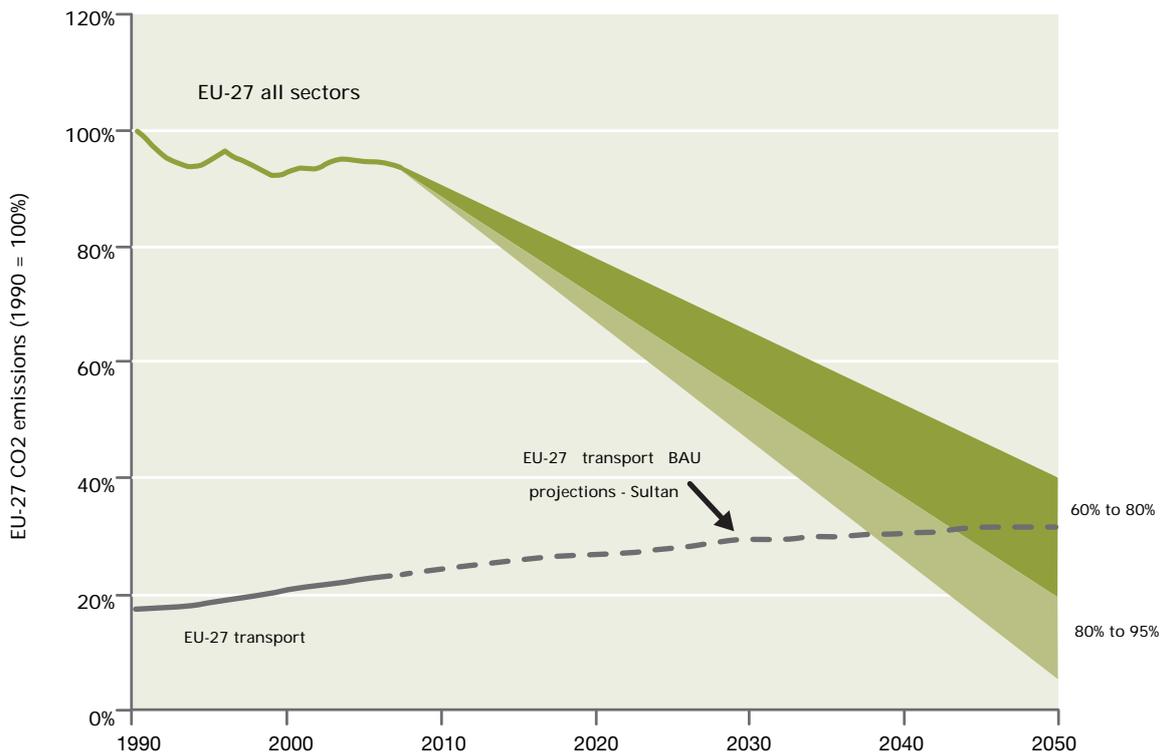
- By 2050, the European railways will strive towards noise and vibrations no longer being considered a problem for the railways – meaning that noise levels become socially and economically acceptable and allow for 24-hour passenger and goods operations in 2050.

to UIC by the European railways, CER members agreed to commit to a sector-wide cut of 30% of specific CO₂ emissions from rail traction over the 1990-2020 period. This is monitored on an annual basis by UIC through its recently established Energy and CO₂ Database, and the most recent analysis shows that the sector is on course to meet this target comfortably.

Planning for the long term

However, given the increasing European focus on a target date of 2050, the members of both CER and UIC agreed on **the need for a long-term strategic approach for the European rail industry itself**: one that would offer an efficient answer to future challenges and create a solid base on which to build. It would provide a framework to match

Figure 2: Projected transport emissions towards 2050 under current trends, compared to overall EU CO₂ reduction scenarios



Source: European Environment Agency (EEA)

overarching political priorities that all players in the rail sector could use over the next 40 years, and would demonstrate the sector's commitment to help to seriously reduce CO₂ in the long-term, whilst also ensuring that the low-carbon advantage that rail has over other modes is retained.

After a detailed consultation process lasting nearly two years, in which careful analysis of the political priorities by CER was combined with the technical expertise of UIC, **Moving towards Sustainable Mobility: Rail Sector Strategy 2030 and beyond** (generally known as the 'Sustainable Mobility Strategy') **was approved by the two organisations in December 2010**. The strategy covers four separate areas – climate protection, energy efficiency, exhaust emissions, and noise and vibrations - and has two main target times: 2030 and 2050. It focuses in particular on the improvement of technological and operational efficiency of current rail activities in the context of wider political changes. In order to ensure that the targets and visions were both credible and feasible, a series of detailed roadmaps planning action over the next decade and beyond were drawn up to accompany the strategy.

Rolling stock: in use to 2050?

At a first glance, this timeframe is a long one. But as well as being the same as long-term EU policy, the railway sector has very long life cycles itself; much of today's 'new technology' is likely to still be in operation approaching 2050.

For typical train sets, the timescale from the conception of an idea, through to production, operation and end-of-life are in the range of 30-50 years – so it is not too early to think, plan and act for the performance of railways in 2050.

By establishing its own strategy, the rail sector is reducing the likelihood of having targets imposed on it, and is demonstrating that it is a responsible and forward-thinking low-carbon mode of transport, whose role should be enhanced as part of the wider move to decarbonise transport. The strategy also provides a framework that allows companies in the rail sector to develop long-term plans, using it as a guide - and to ensure that the low-carbon advantage that rail has over other modes remains.

Study on the implications of modal shift

As well as reducing emissions through its own endeavours, the sector has also been examining how emissions could be cut further through a modal shift from road and air to rail transport. The size of this contribution has been the subject of much debate, so CER and UIC asked consultants CE Delft and TRT **to investigate the GHG reduction potential of a modal shift to rail, particularly through the use of existing infrastructure, but not relying on new-build infrastructure**.

The study, completed in 2011, affirmed that rail freight in particular has significant potential: an assessment of the available capacity showed that **by maximising the use of existing infrastructure alone, a 30-40% growth in train-kilometres could be accommodated by 2020**. If this increased capacity was allocated equally to freight and passenger services, rail freight traffic could grow by 83% and passenger transport by 23% over the whole network. Furthermore, the potential GHG reduction of high-speed rail is 14-18 million tonnes CO₂-eq. in 2020, compared with a scenario where aircraft, cars and conventional rail are used for these trips.

The study also considered the implications of the vision for 2050 outlined by European Commission Vice-President Siim Kallas in Berlin in 2010, in which he envisaged rail would be the dominant mode for long-distance transport by this time. The consultants concluded that this would provide an annual GHG reduction of 238 Mtonnes of CO₂-eq. While this would require heavy investment in rail infrastructure (EUR 1,300-2,000 billion), full internalisation of external and infrastructure costs could contribute significantly to the funding of this.

CHAPTER 3

MAKING EUROPEAN TRANSPORT SUSTAINABLE

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Adaptation: ready, resilient, recover

Efforts being put into mitigating the impact of human activities on the climate, for example with the European Commission's 2008 Climate and Energy Package, only aim to keep the rise in temperature to no more than 2°C. Consequently, there will be climatic changes to which we will have to adapt, regardless of how successful mitigation measures are. **The rail sector must act now to be ready for the consequences of climate change.**

Whatever measures are taken now to limit climate change, the world will still have to face changing climatic conditions. There are two categories of impact:

- A progressive effect, e.g. increase in temperatures in summer, more rain, colder winters, increase in sea level;
- More frequent and violent events, e.g. storms, floods, sudden and heavy snow falls.

The rail sector is already dealing with extreme and adverse climatic events, and the situation is likely to worsen in future, which **is why immediate action must be taken to make rail infrastructure and rolling stock more climate resilient.**

Political momentum for adaptation

On 1 April 2009, the European Commission published the White Paper 'Adapting to climate change: Towards a European framework for action' (COM (2009)147/7).

It sets out a framework to improve the EU's resilience to the impact of climate change and proposes concrete actions:

- Set up an **Impact and Adaptation Steering Group**, comprising member states and consulting representatives from civil society and the scientific community;
- Prepare the ground for a **comprehensive EU adaptation strategy**. Each policy area should review how policies could be refocused or amended to facilitate adaptation, assessing: 1) the potential impact of climate change in the sector, 2) the costs of action versus inaction, and 3) impact of the proposed measures on other sectors;
- In 2011 launch an **online European Clearing House** to exchange information on national adaptation plans and predictions of climate impact and adaptation models;
- **Implement this EU adaptation strategy** from 2013.

While the White Paper clearly focused on agriculture, water and health, the Commission refers specifically to transport infrastructure, stating "infrastructure projects which receive EU funding should take climate-proofing into account".

Rail's work on adaptation goes back a long way

Adapting to the risks caused by the increasing frequency (and intensity) of extreme weather events is a new challenge for society and the rail sector alike. Rolling stock and rail tracks have a long life cycle, and natural hazards must be considered from the start. Railways not only have to survive extreme weather conditions, but must also recover rapidly from them so as to quickly take up their services again. During discussions with the Commission and Parliament, CER emphasised that **transport should be given a higher priority in the EU adaptation strategy to ensure rail is ready, resilient and able to recover.**

As a result, the Commission invited CER to become a member of the EU Adaptation Steering Group. The kick-off meeting took place in September 2010, and the Group now meets every six months. CER takes this opportunity to point out the measures already being undertaken by the rail sector to adapt to climate change, and to build a bridge between the Commission's and the rail sector's activities in this field.

In particular, the work of the UIC Adapting Rail Infrastructure to Climate Change (ARISCC) group, which mainly focuses on preparing rail infrastructure for the time when extreme climatic events become normal climatic conditions, brings a relevant contribution about rail's activities. ARISCC is the ideal platform for railways and rail associations like CER to exchange experiences on their adaptation projects, with the ultimate aim of publishing guidelines on integrated hazard management.

In addition, CER is an interested party in two research projects co-funded by the European Commission:

- the WEATHER project, which looks at how vulnerable rail and road infrastructures are to extreme climatic events (www.weather-project.eu); and
- the EWENT project, which explores the impacts of extreme weather conditions on transport and logistics operations as well as infrastructure (<http://ewent.vtt.fi/>).

By contributing to these projects, CER aims to ensure that the vulnerability of rail infrastructure and the costs associated to adaptation are adequately assessed.

Necessary to adapt? Yes, but with shared costs

CER will continue to raise the sector's voice in the European Commission's Adaptation Steering Group. Not only should the EU adaptation strategy put the correct focus on transport, but it should also **give transport the necessary means to adapt**. The Commission started to look at how to integrate adaptation in the next multi-annual financial perspective (2014-2020), including research funds. Launching a European study on how to make rail infrastructure and rolling stock more climate resilient could be a next step towards enhancing the robustness of the rail sector towards adverse weather events.

Figure 1: Overview map of extreme weather events in Europe between 1999 and 2010



Letters refer to events covered. For further information refer to the source.
Source: UIC, ARISCC interim report, December 2010



CHAPTER 4

CER IN 2010/2011

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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, infrastructure managers and vehicle keepers across Europe. CER represents private operators and state-owned railways, irrespective of their size, structure, or main business area. CER currently has 76 members and two formal partners.

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

CER General Assembly

The General Assembly is the **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 comprises 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 sets up 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 those from Central and Eastern Europe.

Working groups

CER working groups 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)
- 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.

76 member railway and infrastructure companies and two formal partners (as of 1 May 2011)

| 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 | Christian KERN | www.oebb.at |
| AUSTRIA |  | Salzburger Lokalbahn <i>Salzburg Regional Railway</i> | SLB | Gunter MACKINGER | www.slb.at |
| BELGIUM |  | Société Nationale des Chemins de Fer Belges /Nationale Maatschappij der Belgische Spoorwegen <i>Belgian National Railways</i> | SNCB/NMBS | Marc DESCHEEMAECER | 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 | Nedžad OSMANAGIĆ | www.zfbh.ba |
| BOSNIA- HERZEGOVINA |  | Željeznice Republike Srpske <i>Railways of the Republic of Srpska</i> | ŽRS | Petko STANOJEVIĆ | www.zrs-rs.com |
| BULGARIA |  | Balgarski Daržavni Železnitsi <i>Bulgarian State Railways</i> | BDŽ | Pencho POPOV | www.bdz.bg |
| BULGARIA |  | Bulgarian Railway Company <i>Bulgarian Railway Company</i> | BRC | Adrian TACEA | www.brc-bg.com |
| BULGARIA |  | Bulmarket <i>Bulmarket</i> | Bulmarket | Stanko Dobrev STANKOV | www.bulmarket.bg |
| BULGARIA |  | Nacionalna Kompania Železopatna Infrastruktura <i>Bulgarian National Railway Infrastructure Company</i> | NRIC | Milcho LAMBREV | www.rail-infra.bg |
| CROATIA |  | Hrvatske Željeznice <i>Croatian Railway Company</i> | HŽ | Zlatko ROGOŽAR | www.hznet.hr |
| CZECH REPUBLIC |  | Advanced World Transport <i>Advanced World Transport</i> | AWT | Martin FRYVALDSKY | www.awt.eu |
| 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> | SZDC | Pavel HABARTA | www.szdc.cz |
| DENMARK |  | Danske Statsbaner <i>Danish State Railways</i> | DSB | Klaus PEDERSEN | www.dsb.dk |
| DENMARK |  | DB Schenker Rail Danmark <i>DB Schenker Rail Denmark</i> | DB Schenker (DK) | Stig KYSTER-HANSEN | www.rail. dbschenker.dk |
| ESTONIA |  | Eesti Raudtee <i>Estonian Railways</i> | EVR | Kaido SIMMERMANN | www.evr.ee |
| FINLAND |  | VR-Yhtymä Oy <i>VR-Group- Finnish Railways</i> | VR Group | Mikael ARO | www.vr.fi |

| COUNTRY | Logo | Name <i>English Name</i> | Abbreviation | CER General Assembly Representative | Website |
|---------------------|---|---|------------------------|--|-------------------------------------|
| 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 MOHNSEN | www.txlogistik.de |
| GREAT BRITAIN |  | Association of Train Operating Companies <i>Association of Train Operating Companies</i> | ATOC | Roger COBBE | www.atoc.org |
| GREAT BRITAIN |  | DB Schenker Rail UK <i>DB Schenker Rail UK</i> | DB Schenker (UK) | Alain THAUVETTE | www. rail.dbschenker.co.uk |
| GREAT BRITAIN |  | Eurostar (UK) <i>Eurostar (UK)</i> | Eurostar | Nicolas PETROVIC | www.eurostar.com |
| GREECE |  | Organismo Siderodromôn Elladas <i>Hellenic Railways Organisation</i> | OSE | Panayiotis THEOFANOPOULOS | www.ose.gr |
| GREECE |  | TRAINOSE <i>TRAINOSE - Greek National Passenger Train Operating Company</i> | TRAINOSE | Athanasios ZILIASKOPOULOS | www.trainose.com |
| HUNGARY |  | CER Cargo Holding <i>CER Central European Railway Transport, Trading and Service Company</i> | CER | István BÁRÁNY | www.cer.hu |
| HUNGARY |  | Magyar Vasúti Fuvarozói Egyesülés <i>Hungarian Railway Association</i> | HUNGRAIL | László MOSÓCZI | www.hungrail.hu |
| HUNGARY |  | Magyar Államvasutak <i>Hungarian State Railways</i> | MÁV | Ferenc SZARVAS | www.mav.hu |
| HUNGARY |  | Rail Cargo Hungaria <i>Rail Cargo Hungaria</i> | Rail Cargo Hungaria | Imre KOVÁCS | www.railcargo.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/RoeEE | Ilona DAVID | www.gysev.hu |
| 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. ferroviedellostato.it |
| LATVIA |  | Baltijas Ekspressis <i>Baltic Rail Freight Company</i> | BE | Janis BLAZE | www.asbe.lv |
| LATVIA |  | Baltijas Transita Serviss <i>Baltic Transit Services</i> | BTS | Ivars SORMULIS | www.rto.lv/en/ services/railways |
| 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 |

| COUNTRY | Logo | Name <i>English Name</i> | Abbreviation | CER General Assembly Representative | Website |
|-------------|---|---|--------------|--|--------------------------|
| LUXEMBOURG |  | Alpha Trains International <i>Alpha Trains International</i> | Alpha Trains | Shaun MILLS | www.alphatrains.eu |
| 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 | Oliver DERKOSKI | www.mztransportad.com.mk |
| MONTENEGRO |  | Montecargo <i>Montenegro National Freight Operating Train Company</i> | Montecargo | Budimir ŠARANOVIĆ | www.montecargo.me |
| MONTENEGRO |  | Željeznicka Infrastruktura Crne Gore <i>Rail Infrastructure Montenegro</i> | ZICG | Branislav FILIPOVIĆ | www.zicg.me |
| 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 | Aart KLOMPE | www.dbschenker.nl |
| NETHERLANDS |  | MRCE <i>Locomotive Leasing Company</i> | MRCE | Tetsu IKEDA | www.mrce-dispolok.com |
| NORWAY |  | Norges Statssbaner <i>Norwegian State Railways</i> | NSB | Einar ENGER | www.nsb.no |
| POLAND |  | CTL Logistics <i>CTL Logistics</i> | CTL | Jacek BIECZEK | www.ctl.pl |
| POLAND |  | Polskie Koleje Państwowe <i>Polish State Railways</i> | PKP | Maria WASIAK | www.pkp.pl |
| POLAND |  | Rail Polska <i>Rail Poland</i> | Rail Polska | Timothy HOLLAWAY | www.railpolska.pl |
| PORTUGAL |  | CP - Comboios de Portugal, E.P.E. <i>Portuguese Railway Company</i> | CP | José Salomão COELHO BENOLIEL | www.cp.pt |
| ROMANIA |  | Compania Națională de Cai Ferate <i>Romanian National Infrastructure Company</i> | CFR | Ion STOICHESCU | www.cfr.ro |
| ROMANIA |  | Societatea Națională de Transport Feroviar de Călători <i>Romanian National Passenger Train Operating Company</i> | CFR Călători | Liviu PESCĂRAȘU | www.cfr.ro/calatori |
| ROMANIA |  | Societatea Națională de Transport Feroviar de Marfă <i>Romanian National Freight Operating Train Company</i> | CFR Marfă | George MICU | www.cfrmarfa.cfr.ro |
| ROMANIA |  | Grup Feroviar Roman <i>Romanian Railway Group</i> | GFR | Sorin CHINDE | www.gfr.ro |

| COUNTRY | Logo | Name <i>English Name</i> | Abbreviation | CER General Assembly Representative | Website |
|-------------|---|---|----------------------|--|------------------------------|
| 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 Kolajová 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 | Vladimir LUPTÁK | www.zsr.sk |
| SLOVAKIA |  | Železničná Spoločnosť Slovensko <i>Slovak Rail Passenger Operator</i> | ZSSK | Pavel KRAVEC | www.slovakrail.sk |
| SLOVAKIA |  | Železničná Spoločnosť Cargo Slovakia <i>Slovak Rail Freight Company</i> | ZSSK Cargo | Pavol ĎURINIK | www.zscargo.sk |
| SLOVENIA |  | Slovenske Železnice <i>Slovenian Railways</i> | SŽ | Goran BRANKOVIC | www.slo-zeleznice.si |
| SPAIN |  | Administrador de Infraestructuras Ferrovias <i>Spanish Railway infrastructure Manager</i> | ADIF | Antonio GONZÁLEZ MARÍN | www.adif.es |
| SPAIN |  | Ferrocarriles Españoles de Vía Estrecha <i>Spanish Narrow Gauge Railways</i> | FEVE | Amador ROBLES TASCÓN | www.feve.es |
| SPAIN |  | RENFE Operadora <i>National Spanish Railway Operator</i> | RENFE Operadora | Téofilo SERRANO BELTRÁN | www.renfe.es |
| SWEDEN |  | Sveriges Branschföreningen Tågoperatörerna <i>Association of Swedish Train Operators</i> | ASTOC | Jan SUNDLING | www. tagoperatorerna.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/CFF/FFS | Andreas MEYER | www.sbb.ch |
| SWITZERLAND |  | Trasse Schweiz <i>Swiss Train Path Allocating Body</i> | Trasse Schweiz | Thomas ISENMANN | www.trasse.ch |
| TURKEY |  | Türkiye Cumhuriyeti Devlet Demiryolları <i>Turkish State Railway</i> | TCDD | Süleyman KARAMAN | www.tcdd.gov.tr |

Partners (as of 1 May 2011)

| | | | | | |
|---------|---|---|---------|-----------------|------------------|
| GEORGIA |  | Saqtvelos 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 and Management Committee



Mauro MORETTI
FS, Ferrovie dello Stato
CER Chairman



Roger COBBE
ATOC, Association of Train Operating
Companies
CER Vice-Chairman



Vladimir LUPTÁK
ŽSR, Železnice Slovenskej Republiky
CER Vice-Chairman as of February 2011



Rüdiger GRUBE
DB, Deutsche Bahn
Board Member



Jannie HAEK
SNBC /NMBS Holding
Board Member



Antoine HUREL
Veolia, Veolia Transport
Board Member



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



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



Kaido SIMMERMANN
EVR, Aktsiaselts Eesti Raudtee
Board Member



Jan SUNDLING
ASTOC, Branschföreningen
Tågoperatörerna
Board Member



Bert MEERSTADT
NS, Nederlandse Spoorwegen
Board Member as of September 2010



Ion STOICHESCU
CFR, Compania National de Cai
Ferate
Board Member as of February 2011



Ferenc SZARVAS
MÁV, Magyar Államvasutak
Board Member as of February 2011



José Salomão COELHO BENOLIEL
CP, Comboios de Portugal
Associated Member as of June 2010



Andrzej WACH
PKP, Polskie Koleje Państwowe
CER Vice-Chairman until December 2010



Jan KOMÁREK
SŽDC, Správa Železniční Dopravní Cesty
CER Vice-Chairman until September 2010



Peter KLUGAR
ÖBB, Österreichische Bundesbahnen
Board Member until July 2010

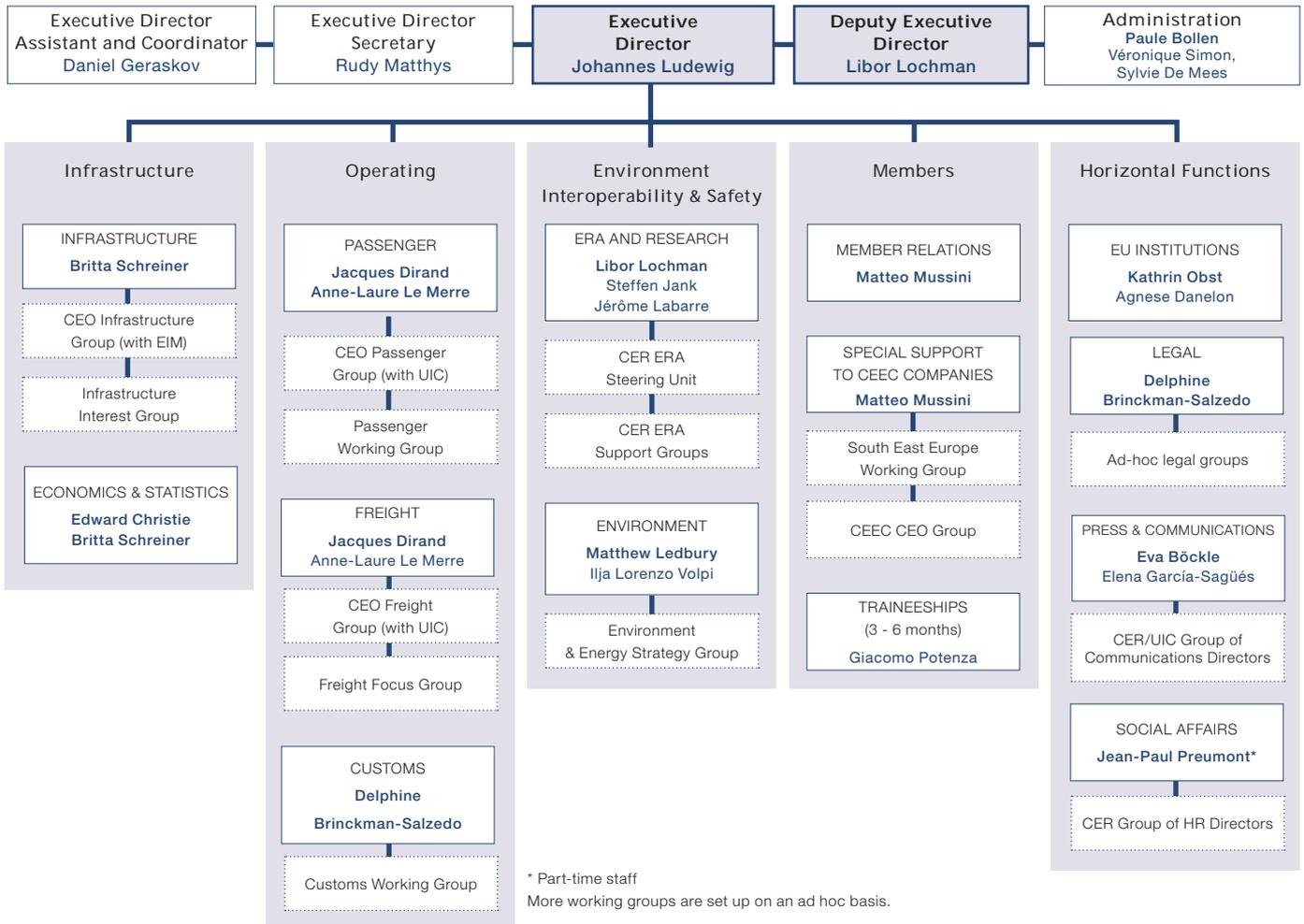


János BERÉNYI
HUNGRAIL, HUNGRAIL Magyar Vasúti
Egyesülés
Board Member until December 2010



Francisco José CARDOSO DOS REIS
CP, Comboios de Portugal
Associated Member until June 2010

CER working structure



CER team



Front row, from left to right: Steffi Slodzinski, Kathrin Obst, Anne-Laure Le Merre, Matteo Mussini, Sylvie De Mees, Ilja Lorenzo Volpi, Delphine Brinckman-Salzedo, Johannes Ludewig, Paule Bollen, Agnese Danelon, Britta Schreiner, Eva Böckle, Elena García Sagüés, Jérôme Labarre, Véronique Simon.

Second row, from left to right: Edward Christie, Giacomo Potenza, Libor Lochman, Matthew Ledbury, Jacques Dirand, Jean-Paul Preumont, Daniel Geraskov, Steffen Jank.

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List of CER publications

From May 2010 to May 2011, CER produced various kinds of publications on a regular basis, including one book, more than 20 position papers and a number of brochures and studies on European rail policy issues. In addition, a monthly newsletter as well as several articles in books and newspapers provided readers with specific background information. The list below only comprises the most important publications. It does not take into account fact sheets, ad-hoc papers, or presentations which CER regularly produces to cover in full the various information levels of all stakeholders in order to efficiently support the lobbying activities at the European level.

All publications, except for CER books, can be ordered from the CER office or downloaded at www.cer.be. You will also find further documents such as press releases or fact sheets and publications from previous years on the website.

Latest CER books

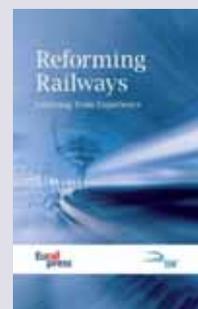
New Reforming Railways – Learning from Experience, 2nd edition

– February 2011

This book, edited by Johannes Ludewig and Jeremy Drew, gives a comprehensive overview of the state of play of reforms in the railway sector in different countries, within and outside Europe.

The sheer pace of reform and the fact that so much material only appears in the national language make it difficult to keep up. These are just two reasons why CER invited distinguished national experts to write an overview on reforms within their countries. In particular, experts were asked for their opinion on what has worked, and what has not.

Copies of the book can be ordered through www.eurailpress.de/ceren or service@eurailpress.de.



European Railway Legislation Handbook, 2nd edition – September 2008

This handbook comprises a comprehensive collection of European railway legislation.

The first part of the book provides a brief commentary on the development of European railway legislation – in English, German, and French. It aims to give a non-technical overview of the context in which European railway legislation has evolved and should help the reader to gain an understanding of the central objectives of particular legislation. The second part of the book is dedicated to the major legal texts themselves, thus making the handbook a reliable reference source.

Copies of the book can be ordered through www.eurailpress.de or service@eurailpress.de.



Latest CER brochures and studies

Potential of modal shift to rail transport – March 2011

Conducted by CE Delft and TRT, this study investigates the greenhouse gas (GHG) reduction potential of a modal shift to rail.

The study covers both freight and passenger transport and focuses on medium- to long-distance transport. It includes an assessment of existing studies on overall modal shift potential, an assessment and extrapolation of illustrative case studies, and an analysis of existing and future infrastructure capacity.



- › Employability in the face of demographic change – Prospects for the European rail sector, March 2011
- › Finding the Funds, June 2010
- › Long-Term Climate Impacts of the Introduction of Megatrucks, May 2009

Latest CER position papers

CER views on the recast of the first railway package – January 2011

This position paper summarises the vision of CER concerning the recast of the first railway package. It outlines CER's support to many of the proposals made by the European Commission aiming at, amongst others, reinforcing the financial framework under which rail transport activities are to be organised, and further facilitating non-discriminatory access to service facilities in the EU while supporting the development of this specific market segment.



- › CER Position Paper on Impact Assessment Questionnaire, March 2011
- › CER Position Paper on Risk Acceptance Criteria, February 2011
- › CER - UIC Position Paper on GSM-R interferences, February 2011
- › CER Proposed Amendments to the Recast of the First Railway Package, February 2011
- › CER-UIP-UNIFE Position Paper on the ERA Report on Railway Vehicle Authorisation, January 2011
- › CER Position Paper on the ERA recommendation to RISC on the Register of Infrastructure, January 2011
- › CER comments on the Everis Study and recommendations for the impact assessment, December 2010
- › Proposed CER Comments to the Interpretative Communication, December 2010
- › CER Position Paper on Wagon TSI, December 2010
- › CER, EIM, UNIFE, UITP, UIP, ERFA and EPTTOLA position on document DV22-EN03, November 2010
- › CER, EIM and UNIFE Position Paper on the progress and development of the SRS for ERTMS Baseline 3, November 2010
- › CER Position Paper on the Note on Assessment Bodies roles and responsibilities in the CSM on risk assessment, November 2010
- › CER Position Paper on Measures to Prevent or Mitigate Freight train Derailments: Infrastructure Design and Operation, Train Defect detection and Condition Monitoring, November 2010
- › CER Position Paper on Measures to Prevent or Mitigate Freight train Derailments: Rolling Stock and Rolling Stock Operations, November 2010
- › Rail Sector Position Papers on DV29, October 2010
- › CER Position Paper on the TEN-T consultation, September 2010
- › CER Position Paper on Track Access Charges, July 2010
- › CER comments on the common position of the Council of 17 December 2009 Proposal for a Regulation on Bus and Coach Passenger Rights, May 2010

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List of political events

2010

31 March

European Commission adopts its work programme for 2010 which includes a recast of the first railway package and a revision of current TEN-T guidelines

20 April

European Parliament holds a debate concerning the disruption to air traffic following the effects of the volcanic ash cloud. MEPs call for improvements to rail infrastructure. Commission Vice-President Kallas sends a letter to CER stressing the importance of fostering the railways which did their utmost to increase transport capacity during these exceptional circumstances

26-30 April

Kallas acknowledges positive performance of railways during the ash cloud crisis

4 May

European Commission launches public consultation on the future of the Trans-European Transport Network in order to analyse a possible methodology for a dual-layer planning approach, as well as ideas on more effective TEN-T implementation

19 May

European Commission launches three new calls for proposals, making an additional 172 million of the Trans-European Transport Network (TEN-T) budget available to finance European transport infrastructure projects

8 June

European Commission appoints three new coordinators for TEN-T priority projects 1 (Berlin-Palermo), 17 (Paris-Bratislava) and 22 (Athens-Nuremberg/Dresden)

8 June

At the TEN-T days in Zaragoza (Spain) the European Commission presents a working document on the revision of the planning methodology for the TEN-T network focusing on a dual-layer TEN-T planning approach. Three MoUs are also signed by concerned member states for an effective implementation of TEN-T Priority Projects 3 (High-Speed Railway Axis of Southwest Europe), Priority Project 6 (Railway

Axis Lyon-Trieste-Diva a/Koper-Diva a-Ljubljana-Budapest-Ukrainian border) and Priority Project 27 (Rail Baltica)

8-9 June

TEN-T Days in Zaragoza, Spain

17 June

European Parliament adopts with a large majority a resolution on the 'Implementation of the first railway package Directives' which, for MEPs, is a fundamental condition for creating a European rail network

17 June

European Council adopts Europe 2020, a new 10-year strategy for jobs and growth to unlock the potential of the EU, starting with innovation and energy policies

24 June

European Council of Transport Ministers discusses initiatives taken in response to the ash cloud crisis, adopts the conclusion on an action plan for sustainable, healthy and safe urban mobility, and debates the contribution that transport policy can make to the new Europe 2020 strategy

29 June

European Commission launches communication campaign to inform rail and air passengers about their rights

1 July

Belgium takes over the presidency of the European Union. Priorities stated in the work programme are of particular importance to the rail sector: Transport White Paper, Review of the Eurovignette Directive, TEN-T revision, Recast of the first railway package

12-16 July

European Parliament invites Etienne Schouppe, Belgian State Secretary for Mobility, to present the Belgian Presidency's plans on transport

8 September

During his "State of the Union" speech to the European Parliament, President Barroso mentions the need for new sources of financing for infrastructure projects, such as EC/EIB project bonds and the further development of PPPs

13 September

European General Affairs Council adopts a regulation on the creation of a European rail network of international freight corridors. It sets out rules for the establishment and modification of freight corridors, their organisation, governance and implementation as well as for investment planning, capacity and traffic management

27 September

DG MOVE Director-General Matthias Ruete presents to the European Parliament TRAN Committee the proposal to recast the first railway package in order to simplify the legislation through a harmonised EU railway code

27 October

European Parliament TRAN Committee holds a debate with TEN-T coordinators about the publication of the TEN-T mid-term review

27 October

European Commission publishes its work programme for 2011 which includes a communication and legislative proposal on rail market access and a revision of ERA

2 December

European Parliament TRAN Committee invites Marcel Verslype, Executive Director of ERA, to give a presentation about the state of the art of certification procedures for rolling stocks, ERTMS and ERA's activities

7 December

European Commission publishes guidelines related to the Regulation for European Rail Network for Competitive Freight to propose examples of practices and methods to be considered in its implementation

10 December

DG MOVE presents the evaluation report of the ERA made by consultants, including CER, and other stakeholders' points of view

2011

1 January

Hungary takes over the EU Presidency being the last country of the so-called presidential trio, after Spain and Belgium

7-8 February

European Council signs off the Eurovignette position and sends the text to the European Parliament to finalise its second reading position in the next four months

8 February

European Commission publishes its Roadmap for moving to a competitive low-carbon economy in 2050, including a proposed sectoral target for reducing GHG emissions from transport

28 February

Parliament's Directorate-General for Internal Policies publishes a study which recommends a shift of transport infrastructure funding to sustainable transport areas

10 March

Commissioner for Regional Policy, Johannes Hahn, discusses consequences of ash cloud crisis with MEPs at the European Parliament plenary session in Strasbourg

28 March

European Commission publishes the new Transport White Paper 'Roadmap to a Single European Transport Area' which sets ambitious goals for cutting GHG emissions and for strengthening the role of rail

12 April

European Parliament TRAN Committee reaches agreement on the revision of the Eurovignette Directive

12 April

European Parliament TRAN Committee discusses two briefing notes contracted to Steer Davies and Gleave related to the recast of the first railway package

13 April

The European Commission presents its proposal to overhaul the outdated rules on the taxation of energy products in the European Union (Energy Taxation Directive)

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List of CER events

2010

23 March

CER discusses broad range of issues with Belgian Transport State Secretary, Etienne Schouppe, and with Director-General of DG MOVE, Matthias Ruete



Etienne Schouppe, Belgian State Secretary for Mobility

12-13 April

Johannes Ludewig participates in a special meeting in Madrid organised by the Centre for European Policy Studies on future climate and energy policy

23 April

Johannes Ludewig meets with German Transport Minister, Peter Ramsauer, to discuss a number of EU transport policy issues

11 May

More than 20 freight CEOs meet in Vienna during the CER-UIC High Level Freight Meeting to reflect on future corridors' business cases

21 May

CER meets Director-General of DG Climate Action, Jos Delbeke, to discuss better pricing measures to reduce CO₂ emissions from transport

26-27 May

Johannes Ludewig attends the Joint customs/railway meeting to celebrate the 50th anniversary of collaboration among railways and customs authorities. Representatives from DG TAXUD, DG MOVE, CIT and EFTA are also present



Johannes Ludewig, CER, and Frank Jost, European Commission, during the 50th joint customs/railway meeting

2 June

Relevant CEOs from CER member companies, DG MOVE and Johannes Ludewig take part in a debate organised by CER at the European Parliament and moderated by MEP Saïd El Khadraoui. CEOs conclude that stable and reliable financing for railways is essential for an efficient European transport system



The 'Railway Financing' event panel from left: Roger Cobbe, Rüdiger Grube, Andrzej Wach, Matthias Ruete, Saïd El Khadraoui, Mauro Moretti, Guillaume Pepy, Jannie Haek and Johannes Ludewig

3 June

Top rail chiefs call for a new approach to severe winters at the CER-EIM High Level Infrastructure Meeting in Coventry (UK)

25 June

CEOs discuss important railway issues and welcome two new member companies at the 40th CER General Assembly in Rome



CEOs and their partners are invited to a gala dinner at Terrazza Caffarelli

5 July

CER meets Director-General of DG COMP, Alexander Italianer, about the specificities of the rail market and the failing financial architecture in CEEC countries

12 July

CER briefs Belgian Transport State Secretary, Etienne Schouppe, about a number of issues related to railways to be developed during the Belgian EU Presidency

14 July

CER and FERRMED, a European association of 140 chambers of commerce and shippers, agree during a meeting on a fundamental change in transport policy

21 July

Johannes Ludewig meets Serbian Minister of Transport, Milutin Mrkonjic, and the top management of Serbian Railways in Belgrade

30 August

CER welcomes a delegation of the US Federal Highway Administration Freight Corridors during a study trip around Europe intended to get a better understanding of infrastructure projects in the EU

14 September

CER, EIM and UNIFE meet European Commissioner for Transport and Vice-President, Siim Kallas, to present their joint position on the Transport White Paper and to ask for a radically new policy framework to achieve an economically efficient decarbonisation of transport



Heads of the three major European rail associations meet with Vice-President Siim Kallas and Keir Fitch, Deputy Head of Cabinet responsible for rail

14 September

CER Chairman, Mauro Moretti, and CER Executive Director, Johannes Ludewig, accompanied by Alberto Mazzola and Mathew Ledbury, meet European Commissioner for Climate Action, Connie Hedegaard, to highlight the role that the rail sector can play in reducing the impact of transport on climate change



CER meets EU Commissioner for Climate Action, Connie Hedegaard

20 September

German Minister of Transport, Peter Ramsauer, welcomes CER members for their General Assembly hosted at the German Transport Ministry in Berlin



CER Chairman Moretti (left) and CER Executive Director Ludewig (right) thanked German Transport Minister Ramsauer (middle) for his welcoming remarks

21 September

CER, EIM and UNIFE CEOs meet European Commissioner for Transport and Vice-President, Siim Kallas, at Innotrans in Berlin



Vice-President Kallas answers questions from CER and EIM CEO's

5 October

Johannes Ludewig meets the Minister for Transport of Romania, Anca Boagiu, to discuss the severe budget constraints imposed on the Romanian state budget by the International Monetary Fund (IMF) which will affect the efficiency of the rail infrastructure



CER Executive Director Johannes Ludewig meets Romanian Transport Minister Anca Boagiu

12 October

CER together with the Belgian Presidency holds a debate with relevant MEPs, academics and EC officials to discuss the vision of rail as the backbone of an interconnected and decarbonised transport system



CER Executive Director Johannes Ludewig thanks Etienne Schoupe, Belgian State Secretary for Mobility, for his support

13 October

CER and BUSINESS EUROPE organise a debate in Brussels to discuss how European legislative procedures can be improved to produce smart regulations, with essential stakeholder inputs, that devise intelligent and cost-effective solutions



From left: Benoit le Bret (Gide Loyrette Nouel), Malcolm Harbour (EP), Jens Hedström (moderator), Marianne Klingbeil (EC), Johannes Ludewig (CER) and Jaroslaw Pietras (Council)

14 October

CER, EIM and UIC organise jointly the first meeting in Brussels of the officers responsible for the Control-Command, Signalling and Operating Strategy (CCS & OPE) to review the current regulatory and voluntary activities in the field of European signalling



CCS officers gather in Brussels to discuss current roles and activities of European CCS & OPE bodies

15 October

CER congratulates Switzerland on Gottard base tunnel breakthrough. CER Chairman, Mauro Moretti, and CER Executive Director, Johannes Ludewig, are invited to the ceremony at the construction site



CER Executive Director Johannes Ludewig and CER Chairman Mauro Moretti participate in the ceremony

27 October

Johannes Ludewig meets the European Commissioner for Energy, Gunther Oettinger, to discuss the interactions between DG ENERGY and DG MOVE, in particular with regard to the forthcoming Transport White Paper, infrastructure financing and market regulation

16 November

CER organises a lunch debate at the European Parliament with MEP Mathieu Grosch and representatives from DG MOVE, Vice-President Kallas' cabinet and the TRAN Committee to discuss how railways are working on ticketing procedures and IT tools and crisis mechanisms during specific situations such as the ash cloud crisis



Participants to the lunch debate organised by CER

23 November

CER meets the Director-General of DG CLIMATE ACTION, Jos Delbeke, to discuss how the forthcoming Transport White Paper will interact with the proposed low-carbon economy 2050 roadmap

1 December

UIC Regional Assembly in Paris approves the joint CER/UIC document 'Moving towards a Sustainable Mobility: European Rail Sector 2030 and beyond' which provides a medium- and long-term plan for the rail sector that fits in with wider environmental and political policy goals

2 December

Johannes Ludewig meets the newly appointed Deputy Prime Minister and Minister for Transport and former European Commissioner, Ján Figel, in Bratislava (Slovakia) to discuss a new pricing system for the use of infrastructure and Mr Vladimír L'upták, newly appointed CEO of the Slovak Infrastructure Manager ZSR.



CER Executive Director Johannes Ludewig meets Ján Figel, Slovakian Deputy Prime Minister and Minister for Transport, Posts and Telecommunications



CER Executive Director Johannes Ludewig meets Vladimír L'upták, CEO of ZSR

2011

19 January

CER Chairman Mauro Moretti is invited to an auction in the Italian Parliament Transport Committee to brief MPs about CER's role and activities and to give an overview about recent developments in the European transport sector

24 January

CER welcomes to its premises the Polish Under-Secretary of State responsible for rail, Andrzej Massel, who discussed his plan for restructuring the Polish rail sector and PKP SA



Andrzej Massel, Polish Under-Secretary of State, Ministry of Infrastructure, and CER Executive Director Johannes Ludewig

4 February

CER Executive Director Johannes Ludewig, EIM Executive Director Hendrik Abma, and UNIFE Director-General Michael Clausecker meet the European Commission Vice-President Siim Kallas to discuss the upcoming White Paper, the need for the internalisation of external costs and the pros and cons of a cap-and-trade system for transport CO₂ emissions

9 February

Former Mayor of London, Ken Livingstone, and Knorr-Bremse Austria Managing Director, Dr Stefan Haas, receive from CER, EIM, and UNIFE the European Railway Award 2011 for political and technical achievements, respectively. European Commission Vice-President Siim Kallas opens the ceremony with a keynote speech



More than 500 participants attended the European Railway Award ceremony

9 February

European Commission Vice-President Siim Kallas launches new CER book *Reforming Railways – Learning from Experience*, which gives a comprehensive overview of the state of play of reforms in the railways sector



CER Chairman Mauro Moretti, European Commission Vice-President Siim Kallas and CER Executive Director Johannes Ludewig

10 February

CER General Assembly agrees election process for new CER Executive Director. DG MOVE Director-General, Matthias Ruete, gives a speech to the General Assembly declaring that for many of the transport challenges currently facing Europe "the answer is rail"



Director-General Matthias Ruete (third from left) addressed the Assembly saying that for many transport challenges "the answer is rail"

12 April

CER Executive Director Johannes Ludewig paid a visit to Bratislava, Slovakia, to meet the CEOs of ZSR, ZSSK and ZSSK Cargo – respectively Mr Vladimir Luptak, Mr Pavel Kravec and Mr Pavol Durinik.



ZSR CEO Vladimir L'upták and CER Executive Director Johannes Ludewig



ZSSK Cargo CEO Pavol Durinik and CER Executive Director Johannes Ludewig



ZSSK CEO Pavel Kravec together with ZSSK CFO Martin Stochmal during the meeting with CER

13 April

CER welcomes in its premises the Hungarian Minister of State for Infrastructure Pál Völner, to discuss the Hungarian Presidency's work on rail transport issues.



Hungarian Minister of State for Infrastructure Pál Völner and CER Executive Director Johannes Ludewig

13 April

CER, together with the Hungarian Presidency, holds a debate with relevant MEPs, EC officials and stakeholders to discuss the revision of TEN-T where the role of rail as the basis of a sustainable and efficient trans-European transport network is highlighted



From left: MEP Kósa, MAV Deputy General Director Mosóczy, MEP Tremosa i Balcells, MEP Lichtenberger, Moderator Wright, Commission Deputy Director General Kazatsay, Hungarian Minister of State Völner and CER Executive Director Ludewig

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CER member statistics

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

CER Members

The large majority of CER members, 78%, are based in one of the EU27 member states. 56% of all CER members are non-integrated companies. Of this, 44% are freight operators, 16% are passenger operators, 19% are independent infrastructure companies, and 21% are freight and passenger operators. In total, approximately 45% of all CER companies are involved in managing rail infrastructure. 23% of CER members are privately owned companies.

Infrastructure

CER member companies managed 177,907 kilometres of railway lines in 2010, which is 0.7% less than in the previous year. Of that, 83% (147,155 kilometres) are located within the EU25 (Malta and Cyprus do not have railway lines). In 2010, CER member companies represented 70% of all railway lines in the European Union.

Employment

The total number of employees of CER member companies decreased by 2.1% in 2010, from 1.234 million in 2009 to 1.260 million in 2009. This is an impressive number of jobs depending directly on the railways: the number of staff employed by CER member companies is similar to that of the population of Estonia, which counted 1.340 million in 2011. Taking into account jobs which depend directly 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.

Figure 1: Geographic breakdown of CER companies

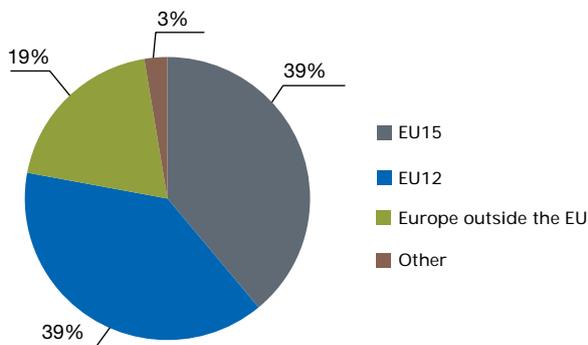


Figure 2: Breakdown of integrated and non-integrated CER companies

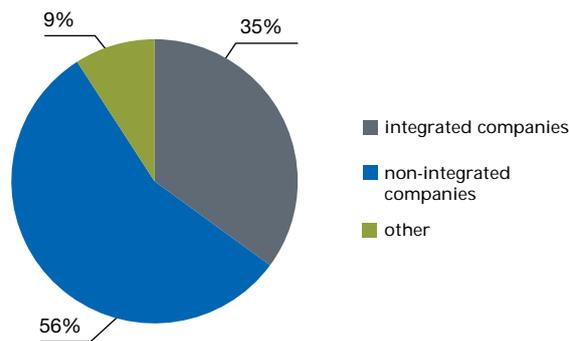
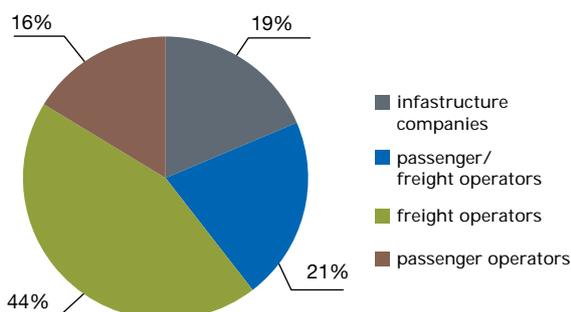


Figure 3: Breakdown of non-integrated CER companies



2010 CER member statistics

| CER Member | COUNTRY | Length of lines | Staff number | | Passengers carried | | Passenger-kilometres | | Freight tonnes carried | | Freight tonne-km | | Turnover | | EBIT | |
|-----------------------------|----------|--------------------|---------------------|----------|----------------------|----------|----------------------|----------|------------------------|----------|--------------------|----------|----------------------|----------|--------------------|----------|
| | | in km | | Δ% 09/10 | millions | Δ% 09/10 | millions | Δ% 09/10 | millions | Δ% 09/10 | millions | Δ% 09/10 | millions € | Δ% 09/10 | millions € | Δ% 09/10 |
| ADIF | ES | 13 853 | 13 761 | -2% | - | - | - | - | - | - | - | - | n/a | n/a | n/a | n/a |
| ASTOC | SE | - | 11 300 | 2% | n/a | n/a | 10 000 | -1% | n/a | n/a | 17 100 | 8% | 1.5 | n/a | n/a | n/a |
| ATOC | GB (UK) | - | 50 478 | -1% | 1 332.8 ^P | 8% | 53 800 | 7% | - | - | - | - | 6 849.0 | 7% | n/a | n/a |
| AWT | CZ | 400 | 1 336 | 0% | - | - | - | - | 11.1 | 54% | 2 149 | 19% | 135.1 ^P | 14% | 15.0 ^P | ▲ |
| BDŽ | BG | - | 13 752 | -11% | 30.1 | -4% | 2 100 | -2% | 10.8 | 2% | 2 352 | 4% | 216.2 | -4% | n/a | n/a |
| BE | LV | - | 164 | 22% | - | - | - | - | 2.9 | 0% | 1 147 | 0% | 20.6 ^P | -7% | 2.08 ^P | ▼ |
| BLS | CH | 434 ^a | 2 800 ^a | n/a | 47.9 ^a | n/a | 788 ^a | n/a | 12.0 ^a | n/a | 2 981 ^a | n/a | 869.0 ^a | n/a | 12.9 ^a | n/a |
| BRC | BG | - | 274 | 1% | - | - | - | - | 1.9 | -19% | 630 | -22% | 13.9 | -12% | n/a | n/a |
| BRKS | SK | - | 79 ^b | n/a | - | - | - | - | 0.7 ^b | n/a | n/a | n/a | 6.8 ^b | n/a | n/a | n/a |
| BTS | LV | - | 135 | 25% | - | - | - | - | 9.4 | 0% | 2 857 | -2% | 49.9 | 4% | n/a | n/a |
| Bulmarket | BG | 16 | 60 | 20% | - | - | - | - | 0.3 | -13% | 81 | 14% | 3.2 | n/a | n/a | n/a |
| ČD | CZ | - | 35 780 | -7% | 163.0 | 0% | 6 553 | 1% | 76.5 | 12% | 13 560 | 8% | 1 495.7 | 7% | -40.2 | ▲ |
| CER | HU | - | n/a | n/a | - | - | - | - | n/a | n/a | 365 ^a | n/a | n/a | n/a | n/a | n/a |
| CFL | LU | 275 | 2 856 | -6% | 17.8 | 4% | 344 | 3% | - | - | - | - | 479.2 | 3% | 9.7 | ▲ |
| CFL Cargo | LU | - | 482 | -1% | - | - | - | - | 7.8 | 17% | 739 | 24% | 135.0 | 28% | n/a | n/a |
| CFR | RO | 10 777 | 25 130 | -6% | - | - | - | - | - | - | - | - | 262.2 | 3% | -246.6 | ▼ |
| CFR Călători | RO | - | 15 179 | -8% | 57.7 | -12% | 5 248 | -12% | - | - | - | - | 467.7 ^P | -1% | -9.8 ^P | ▲ |
| CFR Marfă | RO | - | 13 578 | -30% | - | - | - | - | 30.7 | 4% | 5 611 | 4% | 271.1 ^P | -7% | -18.8 | ▲ |
| CP | PT | - | 3 964 | -3% | 130.0 | -1% | 3 718 | -1% | 9.2 | 8% | 2 056 | 0% | n/a | n/a | n/a | n/a |
| CTL | PL | 101 ^b | 2 500 ^b | n/a | - | - | - | - | 19.3 ^a | n/a | 4 542 ^a | n/a | n/a | n/a | n/a | n/a |
| DB | DE | 33 723 | 239 856 | 0% | 1 950.0 | 2% | 78 582 | 2% | 415.4 | 22% | 105 794 | 13% | 33 364.0 | 14% | 1 866.0 | ▲ |
| DB Schenker DK ^l | DK | - | 243 | -14% | - | - | - | - | 7.1 | 22% | 2 836 | 15% | n/a | n/a | n/a | n/a |
| DB Schenker NL ^j | NL | - | 745 | -10% | - | - | - | - | 26.5 | 15% | 4 103 | 8% | n/a | n/a | n/a | n/a |
| DB Schenker UK ^k | GB (UK) | - | 4 000 | 0% | - | - | - | - | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a |
| DSB | DK | - | 9 449 | 2% | 198.0 | 4% | 7 405 | 2% | - | - | - | - | 1 499.0 | 5% | -13.0 | ▼ |
| Eurostar ^e | UK/FR/BE | 236 | 1 487 | 0% | 9.5 | 3% | 2 090 | 108% | - | - | - | - | 885.0 | 17% | n/a | n/a |
| EVR | EE | 1 280 | 1 737 | 3% | - | - | - | - | 29.6 | 17% | 6 262 | 12% | 107.7 | 11% | 23.9 | ▲ |
| FEVE | ES | 1 194 | 1 873 | -3% | 9.3 | -4% | 188 | -4% | n/a | n/a | 377 | 11% | n/a | n/a | n/a | n/a |
| FS | IT | 16 704 | 82 566 | -6% | 622.0 | 7% | 43 349 | -2% | n/a | n/a | 20 527 | -3% | 7 828.0 ^P | 4% | 374.0 ^P | ▲ |
| GFR | RO | - | 2 371 | 47% | - | - | - | - | 9.3 | 19% | 2 984 | 59% | n/a | n/a | n/a | n/a |
| GySEV/RoeEE | HU/AT | 288 | 1 617 | -4% | 4.4 | -6% | 183 | -4% | 5.4 | 10% | 710 | 53% | 72.0 ^P | -25% | 0.2 ^P | ▲ |
| HUNGRAIL | HU | 7 913 ^a | 29 616 ^a | n/a | 146.6 ^a | n/a | 8 726 ^a | n/a | 44.4 ^a | n/a | 7 889 ^a | n/a | n/a | n/a | n/a | n/a |
| HSB | AL | 423 ^a | 1 882 ^a | n/a | 0.6 ^a | n/a | 32 ^a | n/a | 0.3 ^a | n/a | 46 ^a | n/a | n/a | n/a | n/a | n/a |
| HŽ | HR | 2 722 | 12 556 | -3% | 69.6 | -5% | 1 742 | -5% | 12.2 | 4% | 2 618 | -1% | 453.7 | -4% | -9.2 | ▼ |
| ÍÉ | IE | 1 683 | 4 254 | -5% | 38.2 | -2% | 1 678 | 0% | 0.6 | 0% | 93 | 18% | 190 | -4% | -204.0 | ▼ |
| LDz | LV | 1 897 | 11 958 | -2% | 0.2 | -3% | 75 | -1% | 49.2 | -8% | 17 168 | -8% | n/a | n/a | n/a | n/a |
| LG | LT | 1 767 | 10 318 | -2% | 4.36 | 0% | 373 | 4% | 48.1 | 13% | 13 431 | 13% | 395.3 ^P | 15% | 27.6 ^P | ▲ |
| MÁV | HU | 7 609 | 37 656 | -6% | 105.0 | -2% | 5 259 | -5% | - | - | - | - | 460.8 ^P | 6% | -67.6 ^P | ▼ |
| MONTECARGO ^h | ME | - | 204 | n/a | - | - | - | - | 1.2 | n/a | 151 | n/a | 8.6 | n/a | n/a | n/a |
| NRIC | BG | 3 098 | 14 752 | -5% | - | - | - | - | - | - | - | - | 157.8 | 6% | -7.3 | ▲ |

2010 CER member statistics

| CER Member | COUNTRY | Length of lines | Staff number | | Passengers carried | | Passenger-kilometres | | Freight tonnes carried | | Freight tonne-km | | Turnover | | EBIT | |
|----------------------------------|---------|--------------------|---------------------|----------|--------------------|----------|----------------------|----------|------------------------|----------|---------------------|----------|----------------------|----------|---------------------|----------|
| | | in km | | Δ% 09/10 | millions | Δ% 09/10 | millions | Δ% 09/10 | millions | Δ% 09/10 | millions | Δ% 09/10 | millions € | Δ% 09/10 | millions € | Δ% 09/10 |
| NS | NL | - | 20 246 | -1% | 324.0 | 1% | 16 359 | 0% | - | - | - | - | 2 882.0 | 7% | 149.0 | ▲ |
| NSB | NO | - | 2 662 | 4% | 52.0 | 2% | 2 733 | 0% | - | - | - | - | 526.0 | -4% | -24 | ▼ |
| ÖBB | AT | 5 146 | 44 125 ^c | -4% | 209.8 | 2% | 10 186 | 1% | 117.6 ^c | 12% | 23 097 ^c | 14% | 5 136.1 | 6% | 254.8 | ▼ |
| OSE | EL | 2 522 | 4 244 | -8% | - | - | - | - | - | - | - | - | n/a | n/a | n/a | n/a |
| PKP | PL | 19 702 | 106 569 | -6% | 188.7 | -10% | 15 715 | -4% | 127.8 | 16% | 34 266 | 14% | n/a | n/a | n/a | n/a |
| Rail Cargo Hungaria ^d | HU | - | 2 970 | -2% | - | - | - | - | 31.6 | -1% | 6 341 | 2% | n/a | n/a | n/a | n/a |
| Rail Polska | PL | - | 280 ^a | n/a | - | - | - | - | 2.0 ^a | n/a | 283 ^a | n/a | n/a | n/a | n/a | n/a |
| RegioTrans Brasov | RO | 543 ⁿ | 293 ⁿ | n/a | 2.4 ⁿ | n/a | 56 ⁿ | n/a | - | - | - | - | n/a | n/a | n/a | n/a |
| RENFE Operadora | ES | - | 13 833 ^p | -2% | 453.7 ^p | -3% | 20 978 ^p | -3% | 16.1 ^p | -2% | 7 417 ^p | 6% | 1 936.4 ^p | 2% | -84.7 ^p | ▲ |
| RFYMI | MK | 699 | 1 485 | -2% | - | - | - | - | - | - | - | - | 12.2 | -31% | -7.9 | ▲ |
| RFYMT | MK | - | 1 442 | 6% | 1.5 | -1% | 155 | 0% | 3.1 | 6% | 525 | 6% | 2.3 | 0% | 0.0 | ▼ |
| SBB/CFF/FFS ^m | CH | 3 138 | 28 143 | 1% | 347.1 | 6% | 17 513 | 5% | 50.0 | 1% | 13 111 | 12% | 5 681.0 | 8% | 369.0 | ▲ |
| Servtrans Invest | RO | 64 ^a | 927 ^a | n/a | 0.1 ^a | n/a | 2 ^a | n/a | 4.3 | n/a | 1 019 ^a | n/a | 37.4 ^a | n/a | 2.5 ^a | n/a |
| SLB | AT | 35 ^a | 138 ^a | n/a | 4.8 ^a | n/a | 58 ^a | n/a | 1.8 ^a | n/a | 210 ^a | n/a | n/a | n/a | n/a | n/a |
| SNCB/NMBS Holding | BE | 3 582 | 36 453 | -2% | 224.3 ^p | 2% | 10 609 ^p | 1% | 39.0 ^p | 7% | 5 729 ^p | 5% | 3 537.2 | 11% | -47.4 | ▲ |
| SNCB/NMBS ^g | BE | - | 20 255 ^a | 0% | 224.3 ^p | 2% | 10 609 ^p | 1% | 39.0 ^p | 7% | 5 729 ^p | 5% | n/a | n/a | n/a | n/a |
| SNCF | FR | - | 152 387 | -3% | 1 078.0 | 0% | 84 883 | -1% | 64.4 | -7% | 22 840 | -14% | 18 552.0 | 1% | 704.0 | n/a |
| SŽ | SI | 1 228 | 6 892 | -11% | 16.2 | -1% | 813 | -3% | 15.6 | 19% | 3 283 | 23% | 366.3 ^p | 6% | -10.9 ^p | ▲ |
| SŽDC | CZ | 9 469 | 9 497 | -4% | - | - | - | - | - | - | - | - | 268.5 | -23% | -36.9 | ▼ |
| TCDD | TR | 9 594 | 26 032 | -4% | 84.0 | 5% | 5 491 | 2% | 23.5 | 12% | 11 218 | 11% | 1 764.5 | 10% | 583.0 | ▲ |
| Thalys | BE/FR | - | n/a | n/a | 6.4 | 6% | 2 344 | 5% | - | - | - | - | 432.5 | 13% | n/a | n/a |
| TRAI NOSE | EL | - | 1 532 | -9% | 15.3 ^a | n/a | 1 414 ^a | n/a | 3.2 | -6% | 393 | -27% | 108.6 | 2% | n/a | n/a |
| Trasse Schweiz | CH | - | 11 | 0% | - | - | - | - | - | - | - | - | 1.69 | -3% | 0.04 | ▼ |
| TX Logistik | DE | - | 241 | 24% | - | - | - | - | 3.8 | 52% | 2 700 | 48% | 150.0 | 20% | n/a | n/a |
| Veolia Transport | FR | - | 1 710 | 9% | 67.9 | 12% | 2 012 | 2% | - | - | - | - | n/a | n/a | n/a | n/a |
| VPE ^f | HU | - | 31 | 7% | - | - | - | - | - | - | - | - | 2.4 | -1% | 0.5 | ▼ |
| VR | FI | 5 919 | 7 349 | -3% | 68.9 | 2% | 3 959 | 2% | 35.8 | 9% | 9 750 | 10% | n/a | n/a | n/a | n/a |
| ŽCG | ME | 249 | 873 | -9% | - | - | - | - | - | - | - | - | n/a | n/a | n/a | n/a |
| ŽFBH | BA | 601 | 3 855 | -3% | 0.5 | 0% | 34 | 0% | 7.9 | 10% | 856 | 22% | 58.7 | 14% | n/a | n/a |
| ŽRS | BA | 427 | 3 634 | 6% | 0.4 | -10% | 25 | -10% | 5.1 | 24% | 387 | 18% | 75.7 | 12% | n/a | n/a |
| ŽS | RS | 3 809 | 18 521 | -4% | 7.3 | -13% | 562 | -4% | 12.6 | 21% | 3 522 | 19% | 100.4 | 12% | -51.9 | ▼ |
| ŽSR | SK | 3 622 | 16 989 | 0% | - | - | - | - | - | - | - | - | 290.8 | 3% | -101.5 | ▼ |
| ZSSK | SK | - | 5 014 | 1% | 45.0 | 0% | 2 291 | 2% | - | - | - | - | 259.1 ^p | -16% | -68.3 ^p | ▼ |
| ZSSK Cargo | SK | - | 9 546 | -3% | - | - | - | - | 38.6 | 14% | 7 669 | 18% | 378.2 ^p | 11% | -102.7 ^p | ▲ |
| GR | GE | 1 566 ^a | n/a | n/a | 3.1 ^a | n/a | 626 ^a | n/a | 17.1 ^a | n/a | 5 417 ^a | n/a | n/a | n/a | n/a | n/a |
| JR EAST ^l | Japan | 7 513 | 60 190 | -1% | 6 089.0 | 1% | 126 959 | 2% | - | - | - | - | 20 298.8 | 1% | 2 856.3 | ▲ |

n/a Not available
- Not applicable

▲ Increase
▼ Decrease

- a 2009 data
- b 2008 data
- c Since 2009, data on staff, freight transport volumes and freight transport performance of Rail Cargo Hungaria (RCH) are included in the ÖBB statistics. In 2010, RCH employed 2,970 staff and carried 31.6 million tonnes and 6,341 million tonne-km of freight. Furthermore, the ÖBB staff number includes 1,706 apprentices.
- d Rail Cargo Hungaria is a wholly owned subsidiary of ÖBB.
- e Eurostar was reorganised on 31 August 2010 to create a unified corporate structure within one legal entity, Eurostar International Limited (EIL), with SNCF, French Railways Limited (FRL), London and Continental Railways Limited (LCR) and SNCB as shareholders. This restructuring had an impact on staff number (seconding staff from SNCF and SNCB), length of line (now shown as the longest of the core routes London to Paris, and consequently also on passenger volumes and performance as well as turnover (all of which are calculated based on the longer line length since 1 September 2010).
- f VPE is an independent rail capacity allocation office and can therefore not provide most of the data listed in this table.
- g 2010 staff, turnover and EBIT data was not available at the time of printing this report.
- h JSC Montecargo was established in July 2009. The 2010 data listed in the table can therefore not be compared to the full-year 2009.
- i DB Schenker Rail Danmark is a wholly owned subsidiary of DB AG.
- j DB Schenker Rail Nederland is a wholly owned subsidiary of DB AG.
- k DB Schenker Rail (UK) is a wholly owned subsidiary of DB AG. Unfortunately, 2010 data was not available at the time of printing this report.
- l The JR East figures depicted here are for the fiscal year 2010, which refer to the period 1 April 2010 to 31 March 2011.
- m To calculate turnover and EBIT results in EUR, an annual exchange rate published by the ECB was used (<http://sdw.ecb.europa.eu/browse.do?node=2018794>). In CHF, turnover decreased by -0.1% and EBIT decreased by -1.1% in 2010 compared to 2009.
- n 2007 data

ABBREVIATIONS

| | |
|-----------------|--|
| AAR | Association of American Railroads |
| ARISCC | Adapting Rail Infrastructure to Climate Change |
| CECM | Certification of Entities in Charge of Maintenance |
| CEE | Central and Eastern European |
| CEEC | Central and Eastern European Countries |
| CEPS | Centre of European Policy Studies |
| GER | Community of European Railway and Infrastructure Companies |
| CIT | International Rail Transport Committee |
| CSI | Common Safety Indicators |
| CO ₂ | Carbon Dioxide |
| CSM | Common Safety Methods |
| CST | Common Safety Targets |
| CTG | Coordination Technical Group |
| DCG | Directors of Communications Group |
| EC | European Commission |
| EEA | European Environment Agency |
| EFRTC | European Federation of Railway Trackworks Contractors |
| EIB | European Investment Bank |
| EIM | European Rail Infrastructure Managers |
| ENVI | Committee on Environment, Public Health and Food Safety in the European Parliament |
| EPF | European Passenger Federation |
| EPP | European People's Party, European Parliament Political Group |
| ERA | European Railway Agency |
| ERATV | European Register of Authorised Types of Vehicle |
| ERTMS | European Rail Traffic Management System |
| ETCS | European Train Control System |
| ETF | European Transport Workers' Federation |
| ETS | European Trading Scheme |
| EU | European Union |
| FFG | Freight Focus Group |
| FIA | Federation Internationale de l'Automobile |
| GHG | Greenhouse Gas |
| HRD | Human Resources Directors |
| HVF | Heavy Vehicle Fee |
| IC | Interoperability Constituent |
| IIG | Infrastructure Interest Group |
| IM | Infrastructure Manager |
| IRU | International Road Transport Union |
| ISP | Interchangeable Spare Parts |

| | |
|-----------------|---|
| MEP | Member of the European Parliament |
| MFF | Multiannual Financial Framework |
| MoU | Memorandum of Understanding |
| NRB | Network of Representative Bodies |
| NOx | Nitrogen Oxides |
| NSA | National Safety Authority |
| OSJD | Organisation for Co-Operation between Railways (OSJD) |
| OSS | One-stop shop |
| OTIF | Intergovernmental Organisation for International Carriage by Rail |
| PM10 | Particulate Matter |
| PPP | Public–Private Partnership |
| PSO | Public Service Obligations |
| PWG | Passenger Working Group |
| RISC | Railway Interoperability and Safety Committee |
| RNE | RailNetEurope |
| RŽD | Russian Railways |
| S&D | Progressive Alliance of Socialists and Democrats, European Parliament Political Group |
| SMS | Safety Management System |
| TAF TSI | Technical Specification for Interoperability on Telematic Applications for Rail Freight Transport |
| TAP TSI | Technical Specification for Interoperability on Telematic Applications for Rail Passenger Transport |
| T&E | Transport and Environment |
| TEN-T | Trans–European Transport Network |
| TRAN | Committee on Transport and Tourism in the European Parliament |
| TSI | Technical Specifications for Interoperability |
| UIC | International Union of Railways |
| UIRR | International Union of combined Road-Rail transport companies |
| UITP | International Union of Public Transport |
| UNECE | United Nations Economic Commission for Europe |
| UNIDROIT | International Institute for the Unification of Private Law |
| UNIFE | European Railway Supply Industry |

GLOSSARY

Directive 91/440

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

First Railway Package

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

Second Railway Package

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

Third Railway Package

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

Technical Railway Package

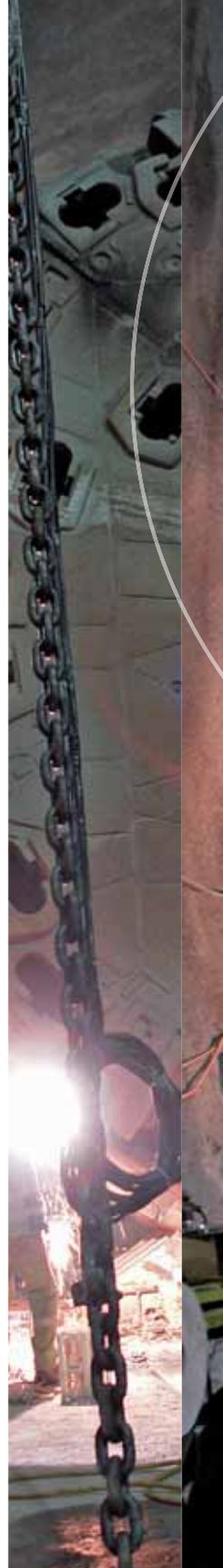
New interoperability Directive 2008/57/EC, revision of the safety Directive 2008/11/EC amending Directive 2004/49/EC and Agency Regulation (EC) 1335/2008 amending Regulation 881/2004 establishing a European Railway Agency.

Greening Transport Package

It aims to move transport further towards sustainability. It has five parts: the Greening Transport Communication, the Greening Transport Inventory, the Strategy to Internalise the External Costs of Transport, the Proposal for a Directive on road tolls for lorries, and the Rail Transport and Interoperability communication.

Transport White Paper

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



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