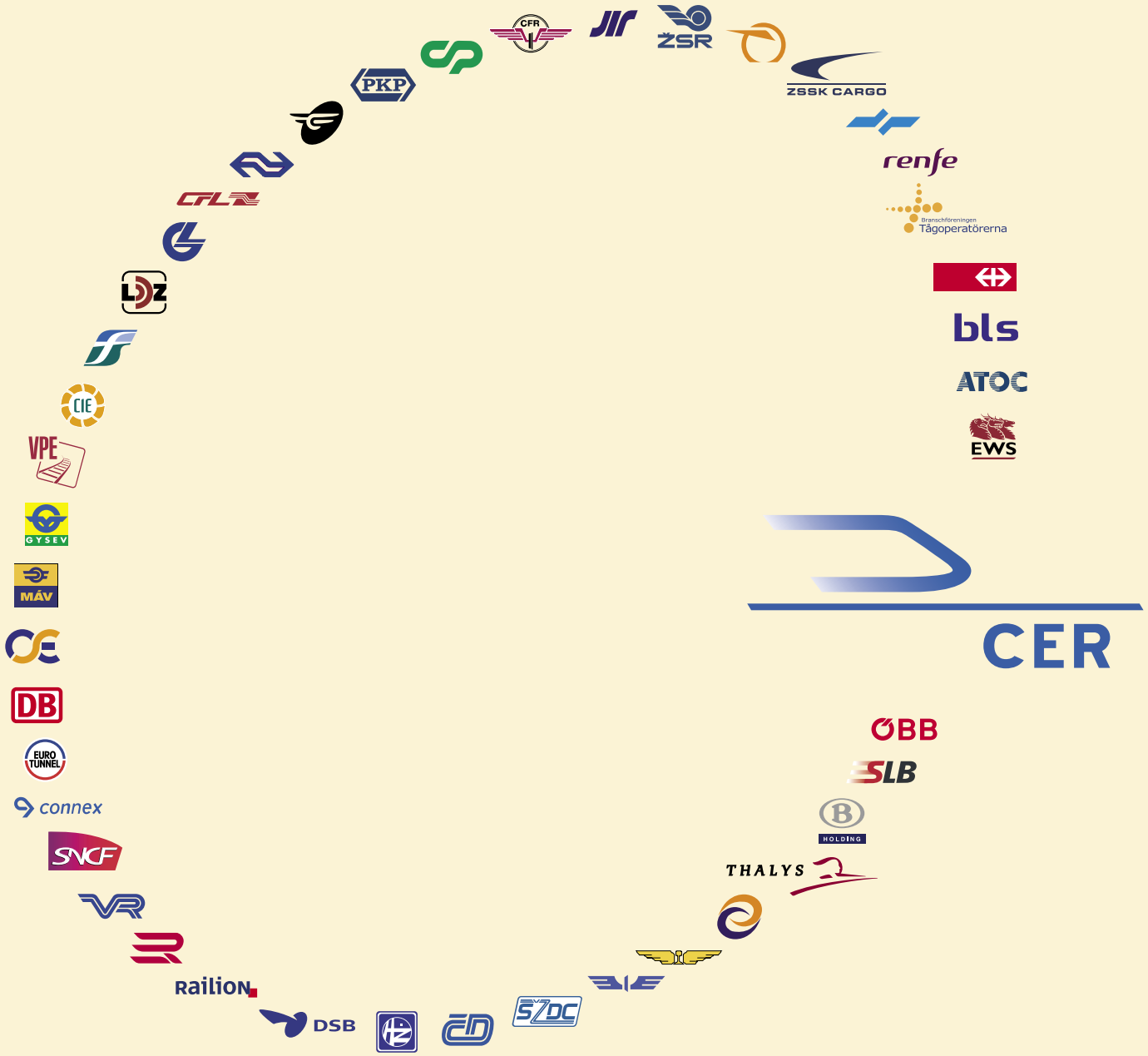


ANNUAL REPORT 2004/2005



The Voice of European Railways





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FOREWORD

This is the third Annual Report presented by the Community of European Railway and Infrastructure Companies (CER). It covers the period from May 2004 to May 2005 – the first full year of the enlarged European Union now comprising 25 member countries – almost the whole of Europe.

In 2004, the European rail freight market grew by 3.5% – substantially better than the underlying rate of economic growth of under 2%, at least in the Eurozone. This suggests that reforms are beginning to produce positive results at the EU level.

EU enlargement remains an issue for the European Union as well as for the European railway community. At the same time, a single European market for rail freight will become a reality in 2007, with the objective of reinforcing rail's market share and supporting the EU strategy for a more environmentally friendly transport system.

This long-established strategy of the European Union for sustainable development, which has been confirmed in several European summit meetings, is now firmly on the agenda of European transport policy. The proposal for the Eurovignette Directive can be seen as the first step to establish a coherent and comprehensive framework for transport prices, which reflect the real costs behind them – including external costs. This in turn could lead to the long-overdue adjustment in transport prices of the different modes; thus opening the way to the change in modal split signalled in EU transport policy and to a new perspective for the internal financing of the transport sector, including its infrastructure.

Against this background, it is clear that the credibility of European transport policy will, to a great extent, depend on the development and on the outcome of the Eurovignette decision-making process. This Annual Report therefore brings this issue properly into focus; while not forgetting other relevant developments in 2004/2005.

We wish all our friends, colleagues and observers inside and outside the railway community an interesting and stimulating read.



Aad Veenman
CER Chairman



Johannes Ludewig
CER Executive Director

SNAPSHOTS OF 2004/2005

The rail sector and Commissioner Barrot signed a Memorandum of Understanding on the deployment strategy for ERTMS in Brussels on 17 March 2005.



CER presented its European Railway Legislation Handbook at Innotrans in Berlin on 21 September 2004 to German Transport Minister Manfred Stolpe (middle).



CER Management Committee members Karel Vinck, Hartmut Mehdorn, Jan Komarek and Johannes Ludewig met the new Transport Commissioner Jacques Barrot (middle) on 30 November 2004.



On 7 December 2004, CER hosted a debate on a European-wide rail compensation scheme for delays in international journeys and the CER/UIC/CIT Rail Passenger Charter. Gilles Savary MEP (left) and Poul Schmidt (Luxembourg's Ministry of Transport) were among the participants.

On 11 May 2004, Carl-Henrik Lundstrøm, Deputy Executive Director, was bid farewell in Brussels. Colin Hall (right) joined CER as his successor.



SNAPSHOTS OF 2004/2005

On 13 October 2004, CER hosted a large-scale railway event in SNCB/NMBS' maintenance station of Schaerbeek, Brussels, to welcome the new Members of the (enlarged) European Parliament and all other representatives of the EU institutions and Brussels transport stakeholders. Locomotives were brought in from Belgium, France, Germany, Luxemburg, Poland and the UK.



Joachim Fried (Corporate Representative for European Affairs and Competition of DB), Karel Vinck (CEO of SNCB/NMBS and CER Chairman) and Louis Gallois (President of SNCF) with Transport Commissioner Loyola de Palacio.

The new President of the European Parliament, Josep Borrell, addressed the guests (here with Karel Vinck, CEO of SNCB/NMBS and CER Chairman).



Paolo Costa (Chairman of the European Parliament's Transport Committee) and Commissioner Loyola de Palacio also spoke in Schaerbeek.



A CER exhibition on the history, present and future of rail interoperability was on display in the European Parliament, Brussels, from 22 to 25 November 2004. It was inaugurated by Commissioner Jacques Barrot (left) and the event's host, Georg Jarzembowski MEP (middle).



On 30 January 2005, Johannes Ludewig met with the President of the EU Council, Lucien Lux (Transport Minister of Luxemburg) and presented the CER Charters on freight and passenger services to him.



CER organised an information seminar on the Second Railway Package for its members on 30 June 2004.

On 7 and 8 April 2005, CER, LDz, the European Investment Bank and the European Commission (TaieX) co-organised a conference on private financing of railway development in Riga.



The Memorandum of Understanding on ERTMS was presented to Members of the European Parliament at a lunch debate on 19 April 2005.



Andris Zorgevics (CEO of LDz) at the Riga conference.



Ainars Slesers (Latvian Minister of Transport) at the Riga conference.

SNAPSHOTS OF 2004/2005

CER, UIC and DB organised a conference on railways and the environment in Berlin on 19 November 2004.



27 January 2005: Michael Jung (Kreditanstalt für Wiederaufbau), Stephen Perkins (ECMT) and Enrico Grillo Pasquarelli (European Commission) participated in one of the round tables at the CER/DG TREN conference on public passenger rail transport services in an enlarged EU.



Georg Jarzembowski MEP, François Lamoureux and Zoltan Kazatsay (both Commission), Johannes Ludwig and Jan Komarek (both CER) at one of the round tables at the CER/DG TREN conference on public passenger rail transport services in an enlarged EU on 27 January 2005.

CEOs of European infrastructure companies attended a CER high-level meeting on infrastructure in Prague on 5 July 2004.



The Prague infrastructure meeting on 5 July 2004.

SNAPSHOTS OF 2004/2005

The CER exhibition on rail interoperability was shown at the EU Transport Council in Luxemburg on 21 April 2005. Johannes Ludewig with EU President Lucien Lux of Luxemburg and Manfred Stolpe of Germany.



Giancarlo Cimoli, CER Chairman and President and CEO of FS, became head of Alitalia in May 2004 and was bid farewell by his colleagues on the CER Management Committee on 24 June 2004. Here with Louis Gallois, CEO of SNCF.



On 25 June 2004, the Director-General of the Commission's DG TREN, François Lamoureux (top left) met with CEOs from Central and Eastern European CER member companies.

With French Minister Gilles de Robien (right)



On 6 October 2004, CER launched two studies: one on the Commission's 2001 White Paper and one on the external effects of transport.



The studies were debated by CER, Georg Jarzembowski MEP (front left), Heinz Hilbrecht (Commission) (front right) and Stephen Perkins (ECMT).



Transport Commissioner Jacques Barrot (right) with Jan Komarek (CEO of SZDC), Petr Kousal (CEO of CD) and Anna Novakova (SZDC) on 26 January 2005.



Commissioner Jacques Barrot addressing the Annual Reception on 26 January 2005.



26 January 2005: Karel Vinck (CEO of SNCB/NMBS and former CER Chairman) with the newly elected CER Chairman Aad Veenman (CEO of NS) at CER's Annual Reception.

Benedikt Weibel (CEO of SBB and UIC President) (left) with Edward Calthrop (CER).



Helena Kyster-Hansen (X-Rail) and Peder Wadman (ASTOC) (right)

From left to right: Rudolf Koller (ÖBB), Martin Huber (ÖBB), Boris Živec (SZ), Vlasta Kampos-Fazarinc (Ministry of Transport of Slovenia), Peter Verlic (State Secretary from the Ministry of Transport), Jacques Dirand (CER), Mirjam Kastelič (SZ), Frank Zepic (Permanent Representation of Slovenia to the EU).



Claudia Langowsky (Verband der Bahnindustrie), Marcel Verslype (European Railway Agency), Joaquin Jiménez Otero (ADIF) and Lara Isasa (UNIFE).





I. PRIORITIES FOR EUROPEAN RAIL POLICY

A. OVERVIEW

In less than two year's time, the European rail freight market will be fully open. International passenger services may well follow. All European railway companies are under tremendous pressure to increase performance - to make services more attractive to customers, whilst at the same time reducing costs. The day-to-day priority for operators is clear.

European politicians, with support from the Commission and CER, have a different role – to define the overall objectives for transport policy, and shape the legislative framework within which operators can compete. CER recognises the significant contribution that European politicians have made in recent years to the rail sector. In particular, policy has consistently recognised the potential for the rail market within Europe, and sought to increase the share of rail in overall transport activity.

CER seeks a constructive and open dialogue with our European political partners. In this spirit, and with a new Commissioner for Transport, Jacques Barrot, recently in office, we would like to set out our **political priorities** for developing the European rail market. We remain concerned that, in order for a competitive rail market to fulfil its potential, two issues remain a priority: developing a genuine European rail network based on key corridors, and ensuring that transport prices better reflect all costs – both internal and external – thus giving customers a stronger incentive to use less environmentally-damaging modes.

A coherent, modern European rail network

A high-quality rail service requires modern infrastructure. And indeed, parts of Europe's rail infrastructure are in very good shape. Recent investments in high-speed lines, for instance the triangle between Paris, Brussels and London, allow operators to provide a competitive service. But these examples remain very much the exception – much of Europe's network was built to meet national requirements from more than a hundred years ago. There is too little route and terminal capacity along many important corridors. In other parts of the network, infrastructure is used more lightly, and maintenance costs can represent an inefficient drain on resources. Whilst infrastructure problems exist across all of Europe, they are particularly acute in parts of Central and Eastern Europe.

Without a modern European network, based along key corridors, there is a serious danger that the potential for rail – particularly freight – will not materialise. Against this background, CER welcomes the adoption of the **30 transport priority projects** – 22 of which are rail related – by the European Union in the spring of 2004. We look forward to the eastwards extension of these corridors – towards the important markets of Turkey, Russia and China – in the near future. The High-Level group formed in October 2004 and chaired by ex-Commissioner de Palacio, will hopefully develop these important new strategic corridors.

I. PRIORITIES FOR EUROPEAN RAIL POLICY

A. OVERVIEW

Against this background, though, the lack of a progress on a **European dedicated rail freight network** remains troubling. Rail freight has enormous potential, particularly within an enlarged Europe. But to compete against trucks, long, heavy freight trains need to be able to run over substantial distances and during the day. This implies segregation, to a large extent, from local passenger traffic. This idea has been discussed for some years, but little practical progress has been made, and the timing has not been synchronised with other discussions on infrastructure. The rail community shares the blame – we have been slow in turning this concept into a practical investment plan. But we regret that the concept was not formally adopted within the recent revision of the TEN guidelines. However, we have a new opportunity in future work with the Commission on the implementation of a harmonised European Rail Traffic Management System (ERTMS), as set out in the March 2005 **Memorandum of Understanding** (MoU). Installing ERTMS along the main rail corridors of Europe offers considerable potential to increase safety, capacity and ease of international operations, while eventually enabling current trackside signalling to be removed. However, such expensive investments can only be made as part of a coherent approach to upgrading entire corridors, including terminals, with implications for both passenger and freight services. The basis for all decisions should be an objective evaluation of the costs and the benefits of new investment. CER is committed to building on its recent success in agreeing the MoU as a practical way forward.

Identifying infrastructure projects is interesting – but without **funding**, it remains academic. The Brenner base tunnel, for instance, is a prime example of how an essential project can remain blocked for decades for lack of political commitment. We therefore strongly welcome the proposal by the Commission to increase European funding to 20 billion Euro for the TEN-T network over the funding period 2007-2013. In short, it is time for the Council of Finance Ministers to decide whether the TEN-T programme can make a substantial contribution to European development or not. However, even this has to be seen from the perspectives of the total funding requirements, estimated over this period at 140 billion. We recognise that Member States, particularly those bound by euro-zone fiscal constraints, cannot fund large-scale investment projects via traditional debt instruments. Public budgets in general are decreasing. By contrast, private European capital funds are plentiful. The rail sector faces the challenge to generate **greater internal financing** and, in doing so, make itself more attractive to external investors. Generating such internal finances requires two measures from the government. Firstly, public financing needs to be stable and predictable. Secondly, the government needs a coherent policy towards taxing the different modes, as we discuss next.



I. PRIORITIES FOR EUROPEAN RAIL POLICY

A. OVERVIEW



Competition between the modes

Rail is less environmentally damaging than its major competitors. In a market economy, however, consumers decide between the modes based, to a considerable degree, on price. If consumer prices do not reflect environmental or ‘external’ costs, the market outcome is inefficient. Yet, as confirmed by numerous scientific studies, transport prices in Europe still largely fail to reflect external costs – the **polluter does not pay**. Figure 1 depicts results for the road freight market in 2000 from a major Commission/ECMT-funded study¹: taxes on trucks in Europe – at least during the daytime – are below external cost. Interestingly, the reverse is true for railways – taxes are shown, in general, to be higher than external costs.

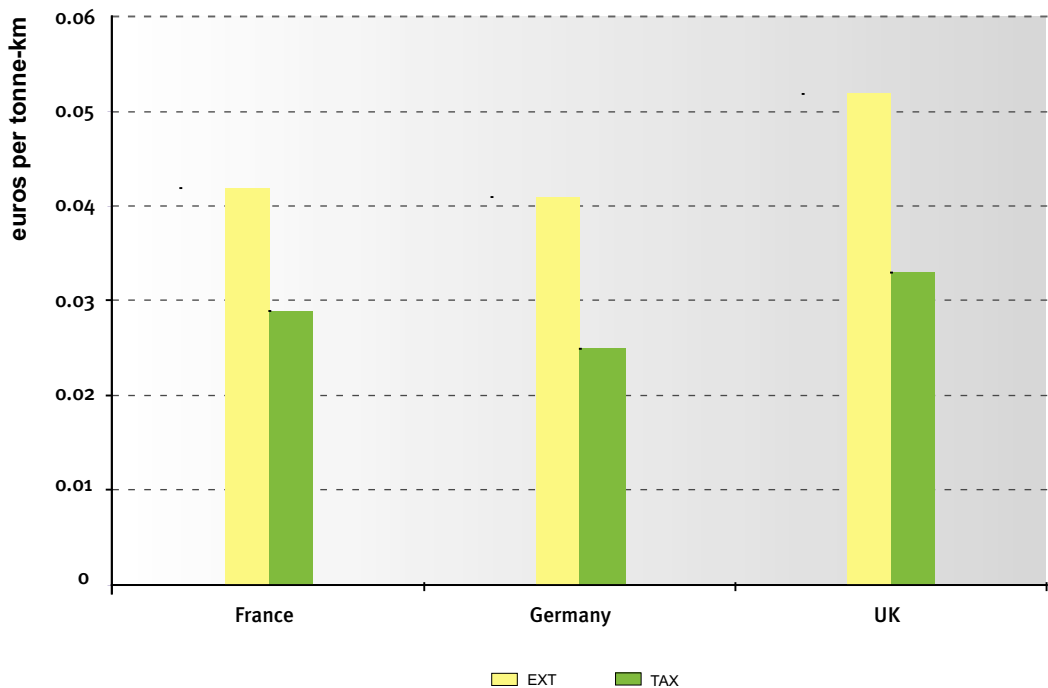


Figure 1 - Taxes vs. external costs (EXT) for trucks on Western Europe's motorways

In its 2001 White Paper², the European Commission recognised the need for a coordinated charging policy across the modes of transport, arguing for a ‘framework’ directive on infrastructure charging. This has not appeared. Rather, discussions have focussed on the principles to be applied to charging trucks to use Europe's motorways, in the form of amendments to the **Eurovignette Directive**.

This Directive is of paramount importance to the rail freight sector. If trucks have to pay their external costs, demand for rail freight will increase. In a ‘returns-to-scale’ industry, i.e. one in which higher volumes imply lower unit costs, higher demand for rail freight increases the possibility to generate profit, which in turn can be used to invest in capacity.

1. ECMT, Paris, 2003: Reforming Transport Taxes
2. White Paper on European Transport Policy for 2010: Time to Decide, COM (2001)370.

I. PRIORITIES FOR EUROPEAN RAIL POLICY

A. OVERVIEW

The recent agreement found in Council on the Eurovignette Directive remains disappointing as it does not allow Member States to internalise all external costs. Rather, on average, charges will only cover the costs of building and maintaining infrastructure. In general, this constraint will keep charges below the efficient level³. This ‘compromise’ construction remains in contrast to numerous public commitments by governments to implement the polluter pays principle. However, we recognise the progress made by Council – it has been discussed three times before without agreement. We trust that the new Commissioner will work towards a compromise nearer to the European Parliament’s position, which, as proposed by the 2001 Commission White Paper, does allow for the full internalization of external costs.

The charging of trucks is an important issue, but it is not the only distortion to competition between the modes. For instance, a trip by train emits, on average, around 18% of the carbon of an equivalent short-haul flight. Yet kerosene is tax exempt, while railways face higher electricity prices under the new EU carbon trading scheme, and pay standard VAT in most countries on top. This cannot be defended – it is neither a sensible environmental policy, nor a rational basis for raising tax revenue. We will work towards a European-wide kerosene tax, which will help alleviate the clear market distortion between high-speed rail and airlines in Europe.

Opening up the European rail market

Competition within the rail sector is increasingly a fact of life for many European railways. By 1 January 2007, the European freight market will be fully opened – a process started within the First Railway Package, and finalised in the Second. CER supported both packages.

Market opening has an important role to play in increasing the modal share of rail freight traffic. For instance, it has recently been estimated that market opening has increased the underlying trend of productivity gains within European railways by an additional one-half of a percent per year⁴. However, market opening is not, as is sometimes suggested, a panacea in its own right. Rather, we believe that the full potential of a competitive European rail freight market will only be realised when market opening is combined with modern infrastructure – at least along the main international corridors – and a coordinated taxation policy across the modes.

CER also acknowledges the opening of international passenger services proposed under the **Third Railway Package**, at least when it does not threaten the basic requirement for operators to have sufficient contractual certainty over access to the infrastructure (‘framework agreements’ in the language of Directive 2001/14) and when public service obligations can be reconciled with market opening in a satisfactory way.

The Third Railway Package, however, at least as a whole, is unlikely to be a significant step forward for rail policy. It is particularly disappointing that it contains two proposals for **quality regulations**. To be clear, all market actors recognise the tremendous importance of quality in attracting customers to rail. But, as is well known, CER is fundamentally opposed to the freight

3. For instance, in the ECMT study quoted above, efficient charges on road vehicles generate revenues that exceed costs by a ratio of two to three. The current proposal, however, imposes that revenues cannot exceed costs.

4. Friebel, Ivaldi and Vibes, 2005: Railway (De)Regulation: a European efficiency comparison, forthcoming in *Economica*. The panel dataset contains 11 European railways over the period 1980 to 2000. Note, however, that the results only relate to the passenger market.

I. PRIORITIES FOR EUROPEAN RAIL POLICY

A. OVERVIEW

regulation, in which the Commission tries to impose detailed contractual clauses on a liberalised market. We are not alone – Professor Chris Nash wrote recently: “The proposed regulation is curious. The whole approach of introducing competition into freight markets is designed to give customers a choice in which, if they are not satisfied by the price/quality mix offered by one operator, they can turn to another.”⁵

We will continue to oppose the Commission’s **freight proposal**. Operators in an open market must retain the freedom to negotiate with their customers directly on price and quality terms. It is therefore very encouraging that the European Parliament’s Transport & Tourism Committee (TRAN) voted to reject the proposal completely at its April 2005 meeting. This unusual development echoes the lack of Council support for the measure.

The situation differs slightly with respect to **international passenger services** – but while CER respects the principles of passenger rights, considerable work needs to be done on the proposed regulation to make it fit for purpose and comparable to other modes. Finally, however, the package contains a proposal for a European driver’s licence certificate, largely based on an agreement between CER and ETF in January 2004, which is widely recognised as useful for a European market.

Competition is meaningful between companies that share a ‘level-playing field’. Looking to Central and Eastern Europe, we remain concerned that this is not the case. Rapid attention is needed to provide legal and financial certainty for public service contracts, thus freeing the freight sector from cross-financing passenger services. Rolling stock is, in many cases, aged. Many state-owned railway companies in Europe are burdened with a high level of historic debt, with interest payments consuming a significant portion of operating revenues. An independent study examining data for 2001 found several European railways in which debt repayments represented over 20 percent of operating costs⁶. Railways operating on the eastern border of Europe are exposed to risk from Russian-funded operators.

Despite these concerns, we remain optimistic about the future for European railways. An enlarged economic area increases the potential for rail freight. Railways have also been working hard to improve their productivity – unit operating costs across EU-15 railways fell by over 11 percent during the period 1995 to 2001, accompanied with a rise in traffic units of 12 percent. Railways in Central and Eastern Europe have broadly reduced employment in line with lower traffic volumes.

European politicians deserve considerable credit for the legislation enacted over the last twenty years. They have recognised the potential for railways, and railways have responded, and will continue to respond, by improving their performance. But there remains a real danger that the political ‘job’ is left only half done. Attention must not waver from the essential issue reforming transport pricing – allowing railways to deliver their environmental advantage within a market economy and secure greater internal financing. Otherwise, the European rail sector – albeit an increasingly efficient sector – will not fulfil its potential and may act as a very real constraint on European economic growth and employment.

5. Nash, Matthews and Shires, Institute of Transport Studies, University of Leeds, 2004: The EU Transport Policy White Paper: an assessment of progress. This study was commissioned by CER.

6. NERA, 2003: Study of the financing of, and public budget contributions to, railways. Table 5.5.

I. PRIORITIES FOR EUROPEAN RAIL POLICY

B. INFRASTRUCTURE

The political developments in 2004 should be seen against a background of the managerial challenges facing infrastructure managers across Europe: to provide a higher quality service to railway undertakings; to reduce costs and keep track access charges competitive; to ensure and enhance safety; to invest for an aging population structure, and to make better use of information technology. In addition, the rail industry in several countries underwent reforms - hence for many, 2004 proved a year of testing a new working structure.

At the European political level, however, 2004 was dominated by the discussions on the **European Rail Traffic Management System (ERTMS)**. A basic political commitment to the system was made on 23 November 2004. Member States, represented in the so-called Article 21 Committee⁷, adopted a particular Technical Standard for Interoperability (TSI) on command, control and signalling for conventional rail. Annex H to that TSI defines a basic European core ERTMS network. But detailed questions remain: with limited funds available, which investments will ensure the highest net benefit?; what is the optimal timing of investments?; and how should interoperability investments be coordinated with general corridor development (in capacity, terminals, etc.) in order to produce an attractive service for train operators? This also begs the question of a **dedicated European rail freight network** – a concept which has been discussed for over ten years, but has yet to deliver practical results.

These types of discussions culminated, on 17 March 2005, in the signing of a **Memorandum of Understanding (MoU)** between the European Commission and the rail industry, represented by CER, the European Rail Infrastructure Managers (EIM) and the Union of European Railway Industries (UNIFE). The signing ceremony, with Commissioner Jacques Barrot signing for the Commission, generated significant media attention.

7. Article 21 of Directive 96/48/EC requires that a Committee, made up of representatives of the Member States, must vote on draft measures relating to interoperability.



I. PRIORITIES FOR EUROPEAN RAIL POLICY

B. INFRASTRUCTURE



Jan Komarek (CEO of SZDC and CER Vice-President) signing the MoU with Commissioner Barrot looking on.

Under this MoU, the rail community has committed to a work plan for the next 18 months: to develop a common methodology for comparing the costs and benefits of all relevant investments needed to develop an effective rail corridor; and then apply this, on a case-by-case basis, to each corridor defined in Annex H to the TSI.

On the basis of these studies, railway partners will then give guidance to Member States in developing national ERTMS implementation plans. Commission will, in turn, use these national plans to draw up a European Master Plan. In the MoU, the Commission has also agreed to issue a Communication to the Council and European Parliament on ERTMS in 2005, dealing with financial aspects of introducing this harmonized system in Europe; agreed in principle to financially support the various corridor studies, particularly those with strong cross-border elements; and agreed to appoint a rail corridor coordinator for implementation.

This work programme will, undoubtedly, provide a challenge for all partners in 2005. In this respect, we particularly appreciate the nomination of Karel Vinck, former CEO of SNCB/NMBS and former Chairman of CER, as the coordinator of the implementation of the MoU.

In addition to ERTMS, wider challenges remain for infrastructure managers in developing TSIs. The work continues on developing a TSI for persons with reduced mobility. This proposal presents a challenge both for rolling stock and infrastructure: it will be necessary to specify relevant train design features, the train-platform interface and other essential design requirements for passenger stations.

I. PRIORITIES FOR EUROPEAN RAIL POLICY

C. FREIGHT

CER's activities in the area of freight in 2004 and 2005 very much focused on promoting the necessary conditions for an optimal development of rail freight in Europe.

CER has actively supported the opening of the rail freight market as one of the necessary conditions for boosting rail freight quality and growth. Nonetheless, it has also been CER's constant concern of the past twelve months to remind the political stakeholders that **liberalisation**, of itself, is not a sufficient condition to revitalise cross-border rail freight. To demonstrate this, CER did not just rely on verbal arguments, but also very concretely initiated actions, in favour of interoperability, infrastructure and quality.

In the field of **interoperability**, CER actively supported the development of a common approach of the European railways to migrate, in a synchronised manner, towards a fully interoperable cross-border data exchange system (in application of the regulation on "Technical Standards for Interoperability in Telematics Applications for Freight"). As a result of this, a project team has now been set up with a view to developing a European-wide 'Migration Plan' of the IT systems of all rail freight undertakings and all infrastructure managers by mid-2006. Rail interoperability and IT interoperability are, for CER, areas which should be kept high on the political agenda. However, it is also CER's view that, in some cases, interoperability has its limits and that too much standardisation can have an adverse effect on business. This is the reason why the railway community (together with the intermodal operators) has expressed strong reservations over the Commission's proposal on 'Intermodal Loading Units'⁸, which is trying to impose a standardised Intermodal Loading Unit at a European level. Such a standardised unit, modelled on the specifications of the heavy maritime containers, would simply jeopardize the viability of rail-road intermodal services which mainly rely on the use of much lighter units. Both railways and intermodal operators agree that, in this field, only the diversity of the offer can best respond to market expectations, not standardisation. Nonetheless, they both welcome other aspects of the proposal, such as the proposed harmonisation of the maintenance procedures for all intermodal units.

In the field of **infrastructure**, in addition to the efforts described in the previous section, CER is also involved in the "TREND" project⁹ which was selected by the European Union in early 2004 (and declared eligible for funding under the 6th Framework Programme for Research of the European Union). The project was officially launched in February 2005 and will particularly focus on the analysis of impediments to rail freight services, (including infrastructure-related impediments) on major European rail freight corridors. Infrastructure schemes will be developed as part of this exercise and will feed into further research to be carried out on the subject of "Dedicated Freight Network". CER is pleased to see that the European Commission is willing to support research in the crucial area of "Dedicated Freight Networks" but regrets that the political focus on this issue has been delayed so much.

8. Proposal for a Directive of the European Parliament and of the Council on intermodal loading units COM(2004)361 of 30 April 2004.

9. Towards new rail freight quality and new concepts for the European rail network with regard to freight market Demand (TREND)

I. PRIORITIES FOR EUROPEAN RAIL POLICY

C. FREIGHT



Lastly, in the area of **quality**, CER remains convinced that quality management naturally falls within the entrepreneurial responsibility of individual companies, and can in no way be regulated by law. This is the reason why CER has remained consistent in its outright opposition to the freight regulation¹⁰ proposed by the European Commission as part of the Third Railway Package. It is therefore very encouraging that on 19 April 2005, the European Parliament's TRAN Committee voted to reject the Regulation in its entirety. Furthermore, after several working group discussions, there was no Member State support for the proposal at the Transport Council meeting in the same week. In the meantime, CER has been very active in making sure that the CER/UIC/CIT Freight Quality Charter adopted by its members in July 2003 is increasingly implemented in day-to-day business. A report on the achievements of the railways in terms of punctuality and quality commitment towards their customers was published in December 2004¹¹. For example, in the field of combined transport, the amount of business covered by quality clauses has increased by 15% in 2004 and punctuality of intermodal trains by 21% between 2001 and 2004. In April 2005, CER/UIC and FIATA/CLECAT¹² published a Joint Declaration on quality indicators and their use in commercial contracts. This and other progress in 2005 will be reported in the next edition of the "CER Freight Quality Update Report" which will be issued in September 2005. In addition, CER will further explore the question of quality as part of its involvement in the TREND project of the 6th Framework Programme for Research (mentioned above). A specific work package in the TREND project will indeed deal with the development of quality indicators, with results due in December 2005.

10. Proposal for a Regulation of the European Parliament and of the Council on compensation in cases of non-compliance with contractual quality requirements for rail freight services COM(2004)144 of 3 March 2004

11. Rail freight quality: meeting the challenge. A report on the first year of the CER-UIC-CIT Freight Quality Charter, December 2004

12. International Federation of Freight Forwarders Associations (FIATA); European Association for Forwarding, Transport, Logistic and Customs Services (CLECAT).

I. PRIORITIES FOR EUROPEAN RAIL POLICY

D. PASSENGER

The last twelve months have been very busy on the passenger policy front. Work has concentrated on the relevant elements of the Third Railway Package - the proposed international passenger liberalisation Directive¹³ and passenger rights Regulation¹⁴ – and the continuing progress on the 2002 CER-UIC-CIT Charter on Rail Passenger Services.

CER developed and published its position on the **passenger liberalisation** proposal by May 2004¹⁵. This acknowledged the principle of liberalisation, and recognised that some CER concerns had been taken into account in the proposal. However, by including cabotage, the proposal would also open to some extent domestic services. This might have far reaching consequences in some countries. Public service contracts play a very important role in the rail passenger sector and it is vital that they are not adversely affected by open access services. The Commission proposal recognises the need to maintain the “economic equilibrium” of these contracts, and it is vital that this principle is properly respected.

Furthermore, the liberalisation process needs the provisions for framework agreements for infrastructure access in Directive 2001/14 to be revised and strengthened, especially for those services developed with specialised infrastructure and large investments. In these precise and limited cases, framework agreements should set out the parameters of the capacity to be allocated in sufficient detail to give appropriate commercial assurance, and prevail over other applications for infrastructure capacity. The duration should correspond to the specific pay-back period.

During the year, CER has developed specific amendment proposals to the Commission text and worked with Members of the European Parliament on their position on the proposal. While the Council has not yet considered this element of the Third Railway Package (one year after its publication), the Parliament’s TRAN Committee has been very active on the subject. TRAN members’ individual reactions ranged from outright rejection to acceleration of liberalisation, and extension of scope to include national service. CER has maintained a balanced position, consistent with its essentially supportive view on the Commission’s proposal. Nonetheless, the 19 April 2005 TRAN Committee meeting voted to extend the scope to national services by 2012 and to accelerate international liberalisation to 2008.

On **passenger rights**, CER believes that the proposed Regulation will not make a significant contribution to the long-term prospects for rail. However, CER has acknowledged the legitimacy of consumer rights, and is working hard to ensure that any regulation is proportionate, consistent with railway system and market realities, and sensibly aligned with existing national and international obligations.

13. Proposal for a Directive of the European Parliament and of the Council, amending Council Directive 91/440/EEC on the development of the Community’s railways COM(2004)139 of 3 March 2004.

14. Proposal for a Regulation of the European Parliament and of the Council on international rail passengers’ rights and obligations COM(2004)143 of 3 March 2004.

15. CER Position Paper: The Third Railway Package, May 2004.

I. PRIORITIES FOR EUROPEAN RAIL POLICY

D. PASSENGER



This is not proving easy. Concerns about the scope; the fit with COTIF-CIV¹⁶; the delay liabilities and compensation proposal; the marketing and other railway business obligations sandwiched in a proposal on passenger rights; and other detailed practical concerns; all this led CER to propose around 80 amendments in October 2004. Since then, the European Parliament's first report further complicated the task by proposing to extend the scope to national services, while suggesting 250 amendments, with some sensible amendments to the Commission's ideas mixed with a shopping list of more "populist" measures. The April 19 TRAN Committee meeting voted to adopt the proposed change in scope in a "mixed bag" of 128 amendments, which improved the Commission's proposal in several areas but left much work to do on other practical and business concerns.

The Council started work on the proposal in January 2005 under the Luxembourg Presidency. The first signs were encouraging: the April Council agreed on the need to anchor the proposal on the COTIF-CIV, and to limit the scope to international passengers.

In February 2005, the Commission published its ideas on how to strengthen passenger rights in all transport modes, building on air and the proposed rail legislation. In principle, CER supports this concept. It is perhaps overdue, and needs a firmer commitment to legislate in other modes, beyond what is already proposed for rail and air. For example, delay compensation is unique to rail. Other contradictions are evident at the detail level on how the different modes are treated. The opportunity for a reasonable, balanced approach across the modes should not be missed.

CER members kept up the momentum in 2004 on the implementation of the 2002 CER/UIC/CIT **Passenger Charter**. Two more major railways (DB and ÖBB) introduced national Charters with delay compensation schemes during the year; and, in a major step forward, an international regime for cross-border delay compensation in all EU states was developed by the UIC and started in December 2004.

16. Convention concerning the international carriage by rail/Uniform Rules concerning the Contract for International Carriage of Passengers by Rail.

This pan-European compensation scheme is the first of its kind across all transport modes. It provides for at least 20% compensation (normally in vouchers) for delays of more than 1 hour for day trains (2 hours for night trains) subject to a 50 Euro minimum fare per single trip.

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In November 2004, CER published a second progress report on the Passenger Charter¹⁷. This recorded that, in general, companies responding positively to the principles of the Charter now accounted for around 90% of EU passenger traffic¹⁸. Railways in new Member States face particular challenges to progress with Charter commitments. This is mainly due to the major backlog in rolling stock and infrastructure investment described elsewhere in this report. But things are moving there, too: the Slovak and Hungarian railways ZSSK and MAV, for example, now have national delay compensation schemes in place.

The progress report included a commentary from the European-level customer organisations with whom CER has worked since 2003. They made challenging but constructive comments about the way forward for the Charter, and CER will develop this theme with them in 2005.

CER plans to publish a third progress report in early autumn 2005.

17. Implementation of the Charter on Rail Passenger Services in Europe. Progress Report, November 2004.

18. UIC Passenger/Kilometre statistics for 2003.



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E. CER SUPPORT FOR RAILWAYS IN CENTRAL AND EASTERN EUROPE



Lou Thompson (consultant) and Bogustaw Liberadzki MEP

EU policies and legislation for the rail sector were conceived to enhance the development of sustainable transport systems in countries that have, for many years, belonged to the European Union and had market-oriented economies. These EU policies hinge on liberalisation and gave the sector the opportunity to prepare for competition. A level playing field for competition does not yet exist in Central and Eastern Europe.

With the enlargement of the European Union, EU legislation and policies were also applied to the new Member States. This created a number of challenges: firstly to implement many new policies, secondly to upgrade their transport links to the old EU Member States and finally to adjust their railway organisations to the structural changes in their economies. Notably, in the years prior to the enlargement of the EU, the demand for rail transport decreased dramatically, and investments in rail transport systems were restricted to upgrading of pan-European corridors.

The renewed growth in freight volumes and the stabilisation of passenger traffic in the new EU Member States suggests that, in general, the railways in these states have coped well with the challenges posed by EU enlargement. However, they are still facing a serious backlog in modernisation and maintenance of their national networks and rolling stock. Moreover, there is a serious threat that investments in rail systems will continue to receive insufficient priority; with the ultimate consequence that the market share of rail in the fast growing economies will decrease further. Urgent action is needed to redress the investment backlog in the rail sector and to provide adequate budget support mechanisms. This action is essential to establish the level playing field on which railway companies can compete, both with each other and with other transport modes.

In 2003, CER set up a **special support programme** for the infrastructure and railway companies in Central and Eastern Europe. Issues of specific interest for these companies were pursued throughout 2004.

On 25 June 2004, in a meeting between the Director-General of the European Commission's Directorate General for Transport and Energy, François Lamoureux, the CEOs of the infrastructure and railway companies in Central and Eastern Europe, and the CER Executive Director, Johannes Ludewig, identified the specific challenges faced by the rail sector in the new EU Member States and agreed on actions to be taken. In June 2005, the same partners will meet again to assess the progress and impact of these actions. The actions focus on five key issues:

- Termination of cross-subsidies between freight and passenger services
- Track access charges
- Financing of rolling stock investments
- EU Cohesion and Structural Funds
- Traffic to and from third countries.



Eva Molnar (Budapest University) and Michel Quidort (Connex)



Zbigniew Szafranski (PKP) and Tom Winsor (White & Case)

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CEOs from Central and Eastern Europe meet with François Lamoureux, Director-General of DG Transport & Energy (centre, second from the left) on 25 June 2004.

Termination of cross-subsidies between freight and passenger services

The European Commission and CER joined forces in early 2005 to organise a conference on public passenger rail transport services in an enlarged European Union. The conference was held in Brussels on 27 January and was attended by over 100 high-level representatives (from politics and the railways) from throughout the new EU Member States and the accession countries. Political awareness is growing on the necessity to allocate state budgets to finance public transport services. Significant budgets are now being allocated under public service contracts in some Central and Eastern European countries, but most of these are still of too short duration (mostly one year). Speakers at the conference urged Member State governments to comply with EU legislation on public transport services and to terminate cross-subsidies between freight and passenger services, in order to allow railways companies to invest in an efficient public transport system, which is attractive for passengers.

Track access charges

In general, track access charges for freight trains are significantly higher in Central and Eastern European countries than in the former EU-15. This phenomenon is detrimental to the competitive position of the rail freight sector and will lead to a loss of market share – at least so long as adequate tolls are not charged along motorways. This is having an adverse effect on the European Commission's declared aim of bringing about a modal shift from road to rail. Governments in Central and Eastern Europe try to recover all rail infrastructure costs through track access charges. This policy, together with a shortfall in track access revenues from passenger services and a backlog in network modernisation, causes track access charges for freight trains to be far too high.

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Financing of rolling stock investments

At the request of the European Commission, CER collected in 2004 an inventory of the vast backlog in rolling stock investment in Central and Eastern Europe. This showed the urgent need to invest up to 10 billion Euro in rolling stock for passenger services and locomotives before 2012. The inventory also showed that the railway companies will not be able to attract sufficient financing on their own. The Commission acknowledged that an innovative scheme is needed for financing rolling stock with state support. Such a scheme should be temporary and enable the railways in Central and Eastern Europe, which carry the burden of a 15-year investment backlog, to compete on equal terms with new entrants in the rail sector.

EU Cohesion and Structural Funds

2004 was the first year in which projects were eligible for funding under the European Union's Cohesion and Structural Fund (up to 2006). Implementing the projects within the timeframe set by the European Union is a major challenge, which requires extraordinary efforts from the administrative and technical authorities involved as well as the railways in the new EU Member States.

In 2005, the European Parliament and Council will decide on the conditions and budgets for the Cohesion and Structural Funds in the period 2007 to 2013. Member States will submit their proposals for national development plans to the Commission. The Commission concluded in its 'Third Report on Economic and Social Cohesion'¹⁹ that the preparation of the national development plans needs to be improved. CER is ready to cooperate with the European Commission and national authorities on the elaboration of well conceived programmes for the development of sustainable transport systems as part of the national development plans. More in particular, CER is keen that an appropriate share (about 50%) of EU and national funds for investments in transport infrastructure is allocated to rail, whereby it is required that EU funds can be used also for addressing the investment backlog in national networks and rolling stock.

For the rail sector in Central and Eastern European countries, it is also evident that the budgets needed for redressing the investment backlog exceed the limits of what can be financed from national budgets and EU investment support. The European Investment Bank, the European Commission and CER therefore jointly organised a conference on funding rail development with special focus on Central and Eastern Europe and giving EU investment support extra leverage with private sector funds. The conference was held on 7 and 8 April 2005 in Riga, Latvia.

19. COM(2004)107

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Jaani Pietikainen (European Investment Bank), Eddie Hartog (European Commission), Roberts Zile MEP and Ad Toet (CER) (from left to right)

Traffic to and from third countries

EU enlargement gave the EU new neighbours whose economies depend heavily on ports and railways in the new EU Member States. For the railways in Central and Eastern Europe, freight traffic to and from these countries is very important, accounting presently for about 40 percent of turnover.

In 2004, the Commission established a High Level Group for developing the transport systems which connect the EU with its new neighbours, the so-called third countries. CER highlighted to the European Commission investment in the upgrading of rail infrastructure nodes and telecommunication systems as priorities for North-Eastern Europe. For South-Eastern Europe, CER urges the EU to support investments in pan-European corridors, national networks and rolling stock, accompanied with measures to streamline border-crossing procedures.

The different legal regimes laid down in the COTIF-CIM and the SMGS²⁰ create considerable frictions and time-consuming procedures in cross-border traffic with third countries. In order to overcome this barrier, the International Rail Transport Committee (CIT) is developing a proposal for a unified consignment note with the Organization for the Collaboration of Railways (OSShD) in close cooperation with CER. The EU should support these efforts with the long-term aim of establishing one coherent regime.

For the Baltic States, rail traffic to and from their neighbouring states outside the EU creates a special problem. The railway systems of these states and their non-EU neighbours are based on the same technical standards and are therefore fully interoperable, but their legal frameworks are different. This difference in the legal framework causes an unintended effect of EU liberalisation policy for the rail sector, with non-EU rail operators as market entrants on these common systems. CER has brought the issue to the attention of the European Commission.

²⁰. Agreement on International Rail Freight Communications with 24 member countries, including countries in CIS, China and Islamic Republic of Iran, and is managed by the Organization for the Collaboration of Railways (OSShD).

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F. EUROPEAN RAILWAY AGENCY, ENVIRONMENTAL, TECHNICAL AND RESEARCH ISSUES

The transition from AEIF to the European Railway Agency

The European Railway Agency (ERA) – set up under Regulation 881/2004/EC²¹ in order to provide Member States and the European Commission with technical assistance in the fields of railway safety and interoperability – started its work on 1 January 2005. The first ERA staff started work in March in Lille/Valenciennes, with about 30 people expected to be appointed by July. The AEIF²² activities will be progressively handed over to the ERA up to the end of 2005, when the total number of ERA staff is expected to be about 70.

The ERA Administrative Board was established in 2004. Hartmut Mehdorn, CEO of Deutsche Bahn AG and member of the CER Management Committee, represents the railways on the Board alongside representatives from Member States and the European Commission.

CER is also one of the official bodies representing the railway sector that is consulted by the ERA. For this reason, CER in April 2005 began to organise the nomination of experts from its members for the ERA working groups. Regular meetings have been set up between the ERA management, CER and other bodies involved in the ERA activities in order to coordinate actions and work programmes. This will ensure close contact between the rail organisations during the nomination of experts and the prioritisation of activities.

21. Regulation 881/2004/EC of the European Parliament and of the Council of 29 April 2004 establishing a European Railway Agency (Agency Regulation)

22. The 'Association Européenne pour l'Interopérabilité Ferroviaire' (the European Association for Railway Interoperability), AEIF, founded in 1995, is the joint representative body mandated by the European Commission to lay down the Technical Specifications for Interoperability (TSIs).

Improving the environmental performance of rail

The transport sector remains one of the main sources of air pollution: transport contributes to around 30% of European CO₂ emissions. Today, CO₂ emissions from transport are 25% higher than 15 years ago, as a result of the enormous increase in transport demand. But, as Figure 2 shows, railways emit significantly less CO₂ than the other transport modes. Railways play a crucial role in reducing greenhouse gas emissions and in creating sustainable transport systems. Bringing about a modal shift from road to rail is the key to achieving the targets of the Kyoto Protocol and at the same time a sustainable global transport policy for the future.

CO₂-EMISSIONS

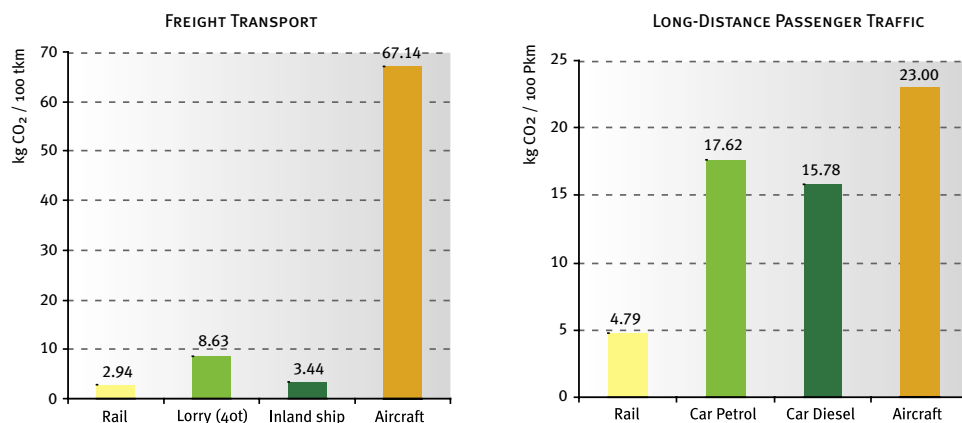


Figure 2. Comparison of CO₂ emissions for freight and passenger transport^a

a. Average load factors. Source: DB, EcoTransIT: www.ecotransit.org, "Umweltmobilcheck" (Environmental mobility check) on www.bahn.de/umweltmobilcheck (Institut für Energie und Umweltforschung (IFEU) Heidelberg).

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The railways are committed to strengthening their environmental performance and to contributing to the reconciliation of economic growth, society's transport demands and the environment.

Considerable efforts have been made to develop new technologies to reduce noise and diesel exhaust emissions, within the framework of the joint action plans of CER and the International Union of Railways (UIC) on noise and diesel.

In the field of **noise reduction**, new emission-reducing materials, synthetic brake blocks (the so called K- and LL-blocks) have been developed and homologated for the European freight wagon fleet. These new brake blocks are intended to replace the old-style iron brake blocks, which roughen wheel surfaces, making them noisier.

CER members have already entered into a voluntary commitment to use only the new environmentally friendlier types of brake blocks for new freight vehicles. But retrofitting the existing fleet urgently needs a commercially acceptable solution. Therefore, funding options need to be found at a European and national level, – within the crucial timelines given by Noise Directive 2002/49²³ – in close cooperation with the European Commission and national ministries. In any case, retrofitting of the existing fleet with the new types of brake blocks is 10 to 20 times less expensive than noise barrier construction along railway lines, but has the same noise reduction effect. In the coming months, the conditions for the EU-wide roll-out of noise-reducing brake blocks have to be clarified.

Another high-priority issue in recent months has been the **reduction of diesel exhaust emissions**. A new project began in January 2005 within the “UIC Diesel Action Plan” carried out by a consortium of UIC, CER, the Union of European Railway Industries (UNIFE), the European Association of Internal Combustion Engine Manufacturers (Euromot) and supported by an external consultant (AEA Technology, UK). This rail diesel project aims to describe the current and future European rail diesel fleet and identify, for different scenarios on a European scale, cost-effective strategies for emission reductions with cost/benefit assessments. The work also has to be seen as preparation for the revision of a Directive on non-road mobile machinery²⁴. This Directive sets limit values for diesel emissions of locomotives and rail car diesel engines and provides for a technical review to confirm these values before the end of 2007.

In November 2004, CER, UIC and Deutsche Bahn AG jointly organised an **international conference** in Berlin on perspectives for a sustainable transport system. Two hundred high-level representatives attended, from European politics, business and industry, railway undertakings and infrastructure companies. The discussions focussed on finding short and long-term solutions for aligning environmental requirements with a viable rail business – in particular rail freight – in the enlarged European Union.

At the conference, CER and UIC launched a brochure on the environment²⁵, which outlines the most important recent initiatives and projects by the railways to reduce their environmental impact.

23. Directive 2002/49/EC of the European Parliament and of the Council of 25 June 2005 relating to the assessment and management of environmental noise.

24. Directive 2004/26/EC of the European Parliament and of the Council of 21 April 2004 amending Directive 97/68/EC on the approximation of the laws of the Member States relating to measures against the emission of gaseous and particulate pollutants from internal combustion engines to be installed in non-road mobile machinery.

25. Railways and the Environment: Building on the railways' environmental strengths, November 2004.

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Coordinating rail research activities

The first term of the European Rail Research Advisory Council (ERRAC) activities ended in February 2005; the second two-year term started in March. ERRAC²⁶ is an advisory body to the European Union, set up by the European Commission and railway managers responsible for research: its objective is to make better use of innovative technologies through improved coordination of rail research activities in Europe. Combined with the 'right' political framework conditions and funding possibilities, this better use of research and technology potential will help strengthen the role of railways in the future.

26. Membership of ERRAC is composed of Member State representatives, the rail supply industry, the railway operators and infrastructure managers, urban rail operators, end users, academia, environmental and urban planning organisations and the European Commission.



II. CHRONOLOGIES

A. POLITICAL EVENTS

2004

1 May	Enlargement of the European Union: membership rises to 25 states
12 May	European Commission issues White Paper on Services of General Interest
26/27 May	European Conference of Ministers of Transport (ECMT) meets in Ljubljana to discuss transport infrastructure planning, infrastructure charging, security and terrorism
1/4 June	European Commission's Green Week conference and exhibition to promote sustainable development
8 June	EU Transport Ministers meet in Santiago de Compostela and set up a High Level Group on the extension of the Trans-European Networks (TENs) beyond EU borders (Wider Europe)
10/11 June	Council of EU Transport Ministers meets in Luxembourg. No agreement on the text of the Eurovignette revision is reached
10/13 June	European-wide elections to the European Parliament
11 June	Commissioner Loyola de Palacio and several Ministers and representatives of the Western Balkan countries sign a Memorandum of Understanding on the development of the South East Europe Core Regional Transport Network. The countries concerned are Albania, Bosnia Herzegovina, Croatia, the former Yugoslav Republic of Macedonia and Serbia and Montenegro (including Kosovo)
1 July	The Netherlands take over the Presidency of the European Union
7 July	At a High-Level meeting between the rail sector and the Director-General of the Commission's DG TREN, it is agreed to work out a joint strategy for the deployment of ERTMS on European rail corridors
14 July	European Commission puts forward proposals for the new Structural Funds Regulations for 2007 to 2013
15 July	Inaugural meeting of the Administrative Board of the European Railway Agency. Reino Lampinen from Finland is elected Chairman of the Agency European Commission issues proposal to establish Marco Polo II
19 July	First plenary session of the new European Parliament (2004-2009) including deputies from the new Member States
20 July	Josep Borrell elected President of the European Parliament Parliament's Committee on Regional Policy, Transport and Tourism is split into two separate committees: the Committee on Transport & Tourism (TRAN) and the Committee on Regional Development Paolo Costa takes the chair of the TRAN Committee
22 July	European Parliament approves José Manuel Barroso as President of the new European Commission

II. CHRONOLOGIES

A. POLITICAL EVENTS

23 July	European Commission launches INSPIRE (Infrastructure for Spatial Information in the European Union), a database with consistent geographical information, supporting environmental protection policies as well as infrastructure development, agriculture and maritime navigation to improve mapping in Europe
12 August	Commission President Barroso presents his proposal for his College of Commissioners
31 August	Karla Peijs, Dutch Minister of Transport, Public Works and Water Management, presents her programme as EU President to the European Parliament's TRAN Committee
31 August/ 1 September	European Parliament's political groups appoint rapporteurs on the components of the Third Railway Package
10 September	CER participates in the European Commission's High-Level Group meeting on ERTMS
13 September	European Commission launches a consultation on climate change policy of the future
16/22 September	European Mobility Week held all over Europe. This year's motto is to reduce road safety risks for children in cities
27 September	European Commission and rail sector agree on basic principles for a Memorandum of Understanding on ERTMS and Telematics for Freight
27 September/ 8 October	Nominated Commissioner hearings in European Parliament Committees
27 September	Railway organisations present their approach on the future implementation of the Technical Specifications for Interoperability (TSI) Telematics for Freight to the European Commission and to the Member States
28 September	European Commission officially grants financial support to the 13 best proposals of the Marco Polo Programme whose principal objective is to shift 12 billion tonnes/kilometres of freight annually off heavily congested roads to more environmentally-friendly modes of transport: rail, short-sea shipping and inland waterways
28/29 September	European Parliament holds its first exchange of views on the Third Railway Package
29 September	Hearing of designated Commissioner for Transport, Jacques Barrot, at the European Parliament
5 October	European Commission appoints members of the European Energy and Transport Forum, a consultative Committee created by the European Commission composed of high-level representatives from a large range of sectors and activities in the fields of energy and transport whose objective is to improve European governance through increased public participation, transparency and dialogue between the Commission and interested parties

II. CHRONOLOGIES

A. POLITICAL EVENTS

6/7 October	European Parliament discusses the Third Railway Package
7 October	Council of EU Transport Ministers meets in Luxembourg: No agreement reached on Eurovignette. Council takes note of a progress report presented by the Presidency on a draft Directive on the certification of train crews operating locomotives and trains on the Community's rail network, based on the CER/ETF agreement reached in October 2003 and decides to revisit this issue at its meeting on 9/10 December.
18/19 October	High Level Group on the extension of the TENs beyond EU borders (Wider Europe) meets in Brussels
21 October	European Commission discusses the first draft of an MoU within the High Level Group on ERTMS
27 October	José Manuel Barroso withdraws College of Commissioners in response to European Parliament's criticism
28 October	Marcel Verslype is appointed Executive Director of the European Railway Agency
29 October	Signing ceremony in Rome of the Treaty and the Final Act to establish the Constitution of Europe; ratification needed by all Member States
18 November	European Parliament approves new College of Commissioners. Jacques Barrot is nominated Vice-President and Commissioner in charge of transport
22 November	First exchange of views in the European Parliament on the Marco Polo II Regulation proposal
23 November	European Parliament discusses the four reports of the Third Railway Package Article 21 Committee concludes and approves discussions on the Noise-TSI, Control-Command and Signalling TSI and Telematic Application for Freight Services TSI
25 November	European Parliament holds its first hearing on the European Regional Development Fund and Cohesion Fund
2 December	The railway sector presents a detailed plan to the Commission and to the Member States within the second Commission hearing on Telematics for Freight
9 December	Günther Hanreich, former Director for Trans-European Energy and Transport Networks at the European Commission's DG TREN, is appointed new Director-General of Eurostat
9/10 December	Council of EU Transport Ministers meets in Brussels and reaches unanimous agreement on general guidelines concerning the draft Directive on the certification of train crews operating locomotives and trains on the Community's rail network. Council confirms the technical characteristics of the Galileo system, decides in favour of moving on to the launching (2006 to 2008) and operational phases of the project

II. CHRONOLOGIES

A. POLITICAL EVENTS

17 December	Negotiations in the Article 21 Committee on the TSI on freight wagons are successfully concluded
20 December	European Commission's High-Level Group on ERTMS successfully completes negotiations on the ERTMS Memorandum of Understanding
21 December	The Administrative Board of the European Railway Agency adopts the Agency's work programme for 2005

2005

1 January	Luxemburg takes over the Presidency of the European Union
12 January	European Parliament endorses the European Constitution with a large majority
17 January	European Commission grants 620 million Euro for the assessment and construction of Trans-European Transport Network projects
19 January	European Parliament debates the amendments to the four elements of the Third Railway Package
30 January	European Commission launches a public consultation on the extension of the Trans-European Transport Network axes to neighbouring countries of the EU
1 February	European Parliament exchanges views with Transport Commissioner Barrot and Luxemburg's Transport Minister and EU President, Lucien Lux
2 February	European Commission presents a new strategy for the EU to create more growth and jobs (Lisbon agenda)
9 February	Commission announces its strategy towards climate change for after 2012
11 February	European Commissioner for Employment, Social Affairs, and Equal Opportunities, Vladimír Špidla, presents a proposal on working conditions for cross-border railway staff based on the CER/ETF agreement of October 2003 Commission issues a Communication on passenger rights in air and other transport modes
16 February	Commission adopts a plan aimed at "strengthening the rights of passengers in all modes of public transport" Commission President Barroso calls upon Transport Commissioner Barrot to prepare a Green Paper on funding the Trans-European Networks Following Russia's ratification, the Kyoto Protocol enters into force
17 February	Commissioner Barrot presents the European radio-navigation system Galileo
18 February	Commission's Directorate-General for Enterprise and Industry launches a public consultation on a possible legislative initiative aimed at technical harmonisation in the urban rail sector

II. CHRONOLOGIES

A. POLITICAL EVENTS

22 February	<p>Commission proposes to the Article 21 Committee the list with representative bodies of the railway industry – comprising UNIFE, CER, EIM, UITP, UIP, UIRR, ERFA, ETF and ALE – whom the European Railway Agency will call on to nominate appointed experts</p> <p>Commission adopts a favourable opinion on the accession to the European Union of the Republics of Bulgaria and Romania</p> <p>European Parliament adopts an own-initiative report (“State aid in the form of public service compensation”) in which small service providers should be excluded altogether from the requirement to notify the Commission of public funding</p>
2 March	<p>Commission announces its decision to launch a consultation process on a future maritime policy for the Union</p>
7 March	<p>High-Level Group on the extension of the TENs beyond EU borders (Wider Europe) meets in Brussels</p>
9 March	<p>Commission proposes to create an EU loan guarantee instrument to facilitate and encourage the financing of priority cross-border transport infrastructure projects, in particular from the private sector, through private-public partnerships</p> <p>The Council Working Group decides to send a list of key questions to Member States regarding the scope of the passenger rights Regulation and its legal context</p>
10 March	<p>Council of EU Environment Ministers meets in Brussels and agrees to set ambitious greenhouse gas reduction targets</p>
11 March	<p>European Parliament holds an act of remembrance for the victims of the Madrid terrorist attacks</p> <p>Commission launches a public consultation on how to cut climate change impact of airplanes</p>
15 March	<p>European Parliament holds a public hearing with representatives of the transport sector and other experts to examine the Commission’s Marco Polo II Regulation proposal</p>
16 March	<p>European Commission tables a ‘Better Regulation Package’ aiming at simplifying and improving the regulatory environment and developing a new common “legislative culture” in Europe</p>
1 April	<p>European Commission proposes to increase Community funding for the TEN-T threefold under the financial perspectives 2007 to 2013</p>
5 April	<p>European Commission organises a public consultation on the extension of the major trans-European axes to neighbouring countries and regions (Wider Europe)</p> <p>The Socialist Group in the European Parliament organises a hearing on the Third Railway Package</p>

II. CHRONOLOGIES

A. POLITICAL EVENTS

6 April	European Commission adopts the last package of detailed proposals linked to the next Financial Framework 2007 to 2013 Commission adopts a proposal for a new EU programme for research – the “Seventh Research Framework Programme 2007-2013”
13 April	Commission publishes a new tender on competition and complementarity between air and rail European Parliament approves the accession of Bulgaria and Romania
19 April	European Parliament votes in first reading on the Third Railway Package: overwhelming rejection of the so-called Freight Quality Regulation The Steering Committee of the Social Dialogue Committee meets in Brussels to discuss the implementation of the CER/ETF Driver’s License Agreement and the Commission’s proposal to transform the agreement on working conditions into a Directive
20 April	TRAN Committee supports the proposal by the Commission on funding the Trans-European Transport Network but considers the level of funding as an absolute minimum
21 April	Council of EU Transport Ministers meets in Luxembourg and reaches an agreement on the infrastructure charging for heavy goods vehicles (Eurovignette)
25 April	Representatives of the EU Member States sign an Accession Treaty with Bulgaria and Romania in Luxembourg Eurostat announces a growth of 3.5% in the European rail freight market in 2004 during a meeting of the European Commission’s ‘Rail Market Monitoring Scheme’ in Brussels
4 May	Commission announces it had allocated 15 million Euro to nine projects of common interest in the Trans-European Transport Network that constitute the last installment of the total 625 million Euro available under the 2004 budget

II. CHRONOLOGIES

B. CER EVENTS

2004

11 May	Farewell reception for Carl-Henrik Lundstrøm, Deputy Executive Director, Brussels. Colin Hall joins CER as his successor
12/13 May	CER and the European Commission (Tsiex) hold workshop on the rail sector development strategy for CER members from Central and Eastern Europe, Brussels
19 May	CER publishes a Position Paper on the Third Railway Package
11 June	CER participates at the UIC Executive Committee, Frankfurt
14 June	Meeting of the International Affairs Directors of the Central and Eastern European CER members, Brussels
22/23 June	CER and the European Transport Workers' Federation (ETF) hold information seminars on the Social Dialogue in the new EU Member States (Slovenian and Hungarian railways), Budapest
23 June	Farewell dinner for Giancarlo Cimoli, CEO of Ferrovie dello Stato and CER Chairman, Paris. Cimoli became CEO of Alitalia in early May
24 June	CER Management Committee, Paris CER participates at the UIC Executive Committee and UIC Assembly of Active Members, Paris CER publishes Annual Report
25 June	High-level meeting between the Director-General of the European Commission's DG TREN, François Lamoureux, his staff and CEOs from Central and Eastern European CER member companies, Brussels
29/30 June	CER and ETF hold information seminars on the Social Dialogue in the new EU Member States (Polish, Czech and Slovak Railways), Bratislava
30 June	CER holds an information seminar for its members on the Second Railway Package, Brussels
5 July	CEOs of European infrastructure companies attend CER High-Level meeting on infrastructure, Prague
7 July	Top-level meeting between the rail sector and the Director-General of the Commission's DG TREN, François Lamoureux, on ERTMS and 'Telematics for Freight', Brussels. It is agreed to set up a High Level Group in order to negotiate a joint understanding on the deployment of ERTMS on European rail corridors
26 July	CER publishes a Position Paper on the Commission's Green Paper on Public Private Partnerships

II. CHRONOLOGIES

B. CER EVENTS

2004

7 September	Karel Van Miert, Head of the High Level Group on the Trans-European Networks, addresses members of the Brussels railway community
8 September	CER meeting of International Affairs Directors, Brussels Special meeting of the International Affairs Directors of the Central and Eastern European CER members, Brussels
10 September	CER participates in the European Commission's High-Level Group meeting on ERTMS
14 September	CER and DG TREN hold a joint, internal workshop on rail transport policy questions, Brussels
20 September	CER participates in ERRAC plenary session, Berlin
21 September	CER Management Committee, Berlin CER participates at the UIC Executive Committee, Berlin CER's European Railway Legislation Handbook is launched at Innotrans 2004, Berlin
27 September	CER participates in the European Commission's High-Level Group meeting on ERTMS
4 October	CER meets with DG TREN to discuss the special situation in Central and Eastern Europe
6 October	Public debate and launch of the ITS report "The EU Transport Policy White Paper: an assessment of progress" and the IWW/INFRAS Update Study on External Costs of Transport CER and UIC publish "The true costs of transport: time to act" brochure CER website is relaunched
8 October	CER participates at the Extraordinary Assembly of Active Members of the UIC, Paris
13 October	CER hosts large-scale railway event in SNCB/NMBS' maintenance station of Schaerbeek, Brussels, to welcome the new Members of the (enlarged) European Parliament and all other representatives of the EU institutions and Brussels transport stakeholders
21 October	CER participates in the European Commission's High-Level Group meeting on ERTMS
2 November	Meeting of the International Affairs Directors of the Central and Eastern European CER members, Brussels CER General Assembly, Brussels: 4 new members welcomed (ASTOC, JZ, SLB, VPE)

II. CHRONOLOGIES

B. CER EVENTS

2004

9 November	CER attends CIT Management Committee
10 November	CER Executive Director meets Commissioner-designate Jacques Barrot
11 November	CER publishes “The Railways in an Enlarged Europe” brochure
15 November	CER and UIC publish “Railways and the Environment: building on the railways’ environmental strengths” brochure
19 November	UIC/CER/DB conference on railways and the environment, Berlin
22/ 25 November	CER exhibition on the history, present and future of rail interoperability on display in the European Parliament, Brussels, hosted by Georg Jarzembowski MEP
22 November	CER publishes “Implementation of the Charter on Rail Passenger Services in Europe: Progress Report”
23 November	CER exhibition on the history, present and future of rail interoperability on display in the European Parliament, Brussels, is inaugurated by Commission Vice-President Jacques Barrot and Georg Jarzembowski MEP
24 November	CER Extraordinary meeting of the International Affairs Directors, Brussels
30 November	Top representatives of CER meet with European Commission Vice-President Jacques Barrot, in charge of transport, Brussels
2 December	CER participates in the European Commission’s High-Level Group meeting on ERTMS
3 December	CER publishes “Rail freight quality: meeting the challenge. A report on the first year of the CER-UIC-CIT Freight Quality Charter”
7 December	CER hosts public debate on the railways’ European compensation scheme for delays in international journeys and the CER/UIC/CIT Rail Passenger Charter, Brussels
12 December	First ever delay compensation scheme for international rail customers enters into force in EU 25 and Norway and Switzerland
13/14 December	CER meeting of International Affairs Directors, Vienna
20 December	European Commission’s High-Level Group on ERTMS successfully completes negotiations on the ERTMS Memorandum of Understanding

II. CHRONOLOGIES

B. CER EVENTS

2005

18 January	CER Executive Director meets Luxemburg's Transport Minister and holder of the EU Presidency, Lucien Lux, Brussels CER publishes "Rolling Stock Financing in Central and Eastern European Countries" Position Paper
26 January	CER Management Committee CER General Assembly, Brussels: Aad Veenman, CEO of NS, is elected CER Chairman and succeeds Karel Vinck, CEO of SNCB/NMBS. 4 new members are welcomed (Thalys, ZFBH, EWS, ZSSK Cargo) CER Annual Reception, Brussels
27 January	Rainer Grohe, Executive Director of the "Galileo Joint Undertaking" presents Galileo project at CER-hosted meeting, Brussels CER and DG TREN hold conference on public passenger rail transport services in an enlarged European Union, Brussels
4 February	CER participates at the UIC Executive Committee, Frankfurt
16 February	CER participates in Extraordinary General Assembly of UIC, Paris
21 February	CER, EIM and UIC host the first meeting of the TAF TSI Strategic European Deployment Plan Steering Committee CER participates in ERRAC plenary session, Brussels
15 March	CER participates in Commission's public hearing on the proposal for Marco Polo II
17 March	CER, EIM, UIC and UNIFE sign Memorandum of Understanding on an EU deployment strategy for ERTMS with European Commission Vice-President Jacques Barrot, Brussels
23 March	CER Management Committee, Paris
5 April	CER participates in European Commission's public consultation on the extension of the TENs beyond EU borders
7 to 8 April	CER/European Commission (Tsiex)/European Investment Bank conference on private financing of railway development, Riga
19 April	CER hosts briefing session for Members of the European Parliament on the signing ceremony of the Memorandum of Understanding on ERTMS
21 April	CER exhibition on interoperability on display at the Council of Transport Ministers' meeting, Luxemburg, hosted by Luxemburg's Transport and Environment Minister and holder of the EU Presidency Lucien Lux
9/10 May	CER meeting of International Affairs Directors, Utrecht

III. ABOUT CER

A. MEMBER RAILWAY UNDERTAKINGS AND INFRASTRUCTURE COMPANIES

COUNTRY	Logo	NAME	ENGLISH NAME	ABBREVIATION	WEBSITE
Austria		Österreichische Bundesbahnen	Austrian Federal Railways	ÖBB	www.oebb.at
Austria		Salzburger Lokalbahn	Salzburg Regional Railway	SLB	www.lokalbahn.info
Belgium		Société Nationale des Chemins de Fer Belges/Nationale Maatschappij der Belgische Spoorwegen	Belgian National Railways	SNCB/NMBS HOLDING	www.b-rail.be
Belgium/France		Thalys International	Thalys International	Thalys	www.thalys.com
Bosnia-Herzegovina		Željeznice Federacije Bosne i Hercegovine	Railways of the Federation of Bosnia-Herzegovina	ŽFBH	
Bulgaria		Nacionalna Kompania Železopatna Infrastruktura	Bulgarian National Railway Infrastructure Company	NRIC	www.rail-infra.bg
Bulgaria		Balgarski Daržavni Železnitsi	Bulgarian State Railways	BDŽ	www.bdz.bg
Croatia		Hrvatske Željeznice	Croatian Railway Company	HŽ	www.hznet.hr
Czech Republic		Správa Železniční Dopravní Cesty	Czech Railway Infrastructure Administration	SŽDC	www.szdc.cz
Czech Republic		České Dráhy	Czech Railways	ČD	www.cd.cz
Denmark		Danske Statsbaner	Danish State Railways	DSB	www.dsb.dk
Denmark		Railion Danmark	Railion Denmark	Railion	www.railion.dk
Estonia		Eesti Raudtee	Estonian Railways	EVR	www.evr.ee
Finland		VR-Yhtymä Oy	VR-Group – Finnish Railways	VR	www.vr.fi
France		Société Nationale des Chemins de Fer Français	French National Railway Company	SNCF	www.sncf.fr
France		Connex	Connex	Connex	www.connex.net
France /UK		Eurotunnel	Eurotunnel	Eurotunnel	www.eurotunnel.com
Germany		Deutsche Bahn	German Railway Group	DB	www.bahn.de
Greece		Organismos Siderodromôn Elladas	Hellenic Railways Organisation	OSE	www.ose.gr
Hungary		Magyar Államvasutak	Hungarian State Railways	MÁV	www.mav.hu
Hungary		Vasúti Pályakapacitás-Elosztó	Hungarian Railway Capacity Allocator	VPE	www.vpe.hu
Hungary/Austria		Győr-Sopron-Ebenfurti Vasút	Győr-Sopron-Ebenfurth Railway Company	GySEV/RoeEE	www.gysev.hu

III. ABOUT CER

A. MEMBER RAILWAY UNDERTAKINGS AND INFRASTRUCTURE COMPANIES

COUNTRY	Logo	NAME	ENGLISH NAME	ABBREVIATION	WEBSITE
Ireland		Córas Iompair Éireann	Irish Transport Group	CIE	www.irishrail.ie
Italy		Ferrovie dello Stato	Italian Railway Group	FS	www.ferroviellostato.it
Latvia		Latvijas Dzelceļš	Latvian Railways	LDz	www.ldz.lv
Lithuania		Lietuvos Geležinkeliai	Lithuanian Railways	LG	www.litrail.lt
Luxembourg		Société Nationale des Chemins de Fer Luxembourgeois	Luxembourg National Railway Company	CFL	www.cfl.lu
Netherlands		Nederlandse Spoorwegen	Dutch Railways	NS	www.ns.nl
Netherlands		Railion Nederland	Railion Netherlands	Railion	www.railion.nl
Norway		Norges Statsbaner	Norwegian State Railways	NSB	www.nsb.no
Poland		Polskie Koleje Państwowe	Polish State Railways	PKP	www.pkp.com.pl
Portugal		Caminhos de Ferro Portugueses	Portuguese Railway Company	CP	www.cp.pt
Romania		Compania Nationala de Cai Ferate	Romanian National Railway Company	CFR	www.cfr.ro
Serbia-Montenegro		Zajednica Jugoslovenskih Železnica	Community of Yugoslav Railways	JŽ	www.yurail.co.yu
Slovakia		Železnice Slovenskej Republiky	Slovak Infrastructure Company	ŽSR	www.zsr.sk
Slovakia		Železničná Spoločnosť Slovensko	Slovak Railway Operator	ŽSSK	www.slovakrail.sk
Slovakia		Železničná Spoločnosť Cargo Slovakia	Slovak Rail Freight Company	ŽSSK Cargo	www.slovakrail.sk
Slovenia		Slovenske Železnice	Slovenian Railways	SŽ	www.slo-zeleznice.si
Spain		RENFE Operadora	National Spanish Railway Operator	RENFE Operadora	www.renfe.es
Sweden		Sveriges Branschföreningen Tågoperatörerna	Association of Swedish Train Operators	ASTOC	www.tagoperatorerna.se
Switzerland		Schweizerische Bundesbahnen/ Chemins de Fer Fédéraux Suisses/ Ferrovie Federali Svizzere	Swiss Federal Railways	SBB/CFB/FFS	www.sbb.ch
Switzerland		BLS Lötschbergbahn	Lötschberg Railway Company	BLS	www.bls.ch
United Kingdom		Association of Train Operating Companies	Association of Train Operating Companies	ATOC	www.atoc.org
United Kingdom		English, Welsh and Scottish Railways	English, Welsh and Scottish Railways	EWS	www.ews-railway.co.uk

III. ABOUT CER

B. MANAGEMENT COMMITTEE AND GENERAL ASSEMBLY MEMBERS

CER Presidency (2004 to 2005)				
Aad	VEENMAN	CER Chairman* Chief Executive Officer	NS	Dutch Railways
Karel	VINCK	CER Chairman** Chief Executive Officer	SNCB/NMBS HOLDING	Belgian National Railways
Maciej	MECLEWSKI***	CER Vice-Chairman President and Chief Executive Officer	PKP	Polish State Railways
Elio	CATANIA	CER Vice-Chairman* Chairman and Chief Executive Officer	FS	Italian Railway Group
Jan	KOMÁREK	CER Vice-Chairman Director General	SŽDC	Czech Railway Infrastructure Administration
Adrian	SHOOTER	CER Vice-Chairman Deputy Chairman	ATOC	Association of Train Operating Companies

Members of the CER Management Committee (2004 to 2005)				
Elio	CATANIA	CER Vice-Chairman* Chairman and Chief Executive Officer	FS	Italian Railway Group
Louis	GALLOIS	Chairman of the Board and Chief Executive Officer	SNCF	French National Railway Company
Antoine	HUREL*	Deputy Chief Executive Officer	Connex	Connex
Jan	KOMÁREK	CER Vice-Chairman Director General	SŽDC	Czech Railway Infrastructure Administration
Henri	KUITUNEN	President and Chief Executive Officer	VR	VR-Group – Finnish Railways
Zoltán	MÁNDOKI	Director General	MÁV	Hungarian State Railways
Maciej	MECLEWSKI***	CER Vice-Chairman President and Chief Executive Officer	PKP	Polish State Railways
Hartmut	MEHDORN	Chief Executive Officer	DB	German Railway Group
Adrian	SHOOTER	CER Vice-Chairman Deputy Chairman	ATOC	Association of Train Operating Companies
Aad	VEENMAN	CER Chairman* Chief Executive Officer	NS	Dutch Railways
Karel	VINCK	CER Chairman** Chief Executive Officer	SNCB/NMBS HOLDING	Belgian National Railways
Andrzej	WACH*	President and Chief Executive Officer	PKP	Polish State Railways
Benedikt	WEIBEL	UIC President Chief Executive Officer	SBB/CFF/FFS	Swiss Federal Railways

* From 26 January 2005

** Until 26 January 2005

*** Until 2 November 2004

III. ABOUT CER

B. MANAGEMENT COMMITTEE AND GENERAL ASSEMBLY MEMBERS

Members of the CER General Assembly (as at 10 May 2005)				
Christopher	AADNESEN	Chairman of the Management Board and Managing Director	EVR	Estonian Railways
Josef	BAZALA	Chairman of the Board and Director General	ČD	Czech Railways
Alain	BERTRAND	Infrastructure Director	Eurotunnel	Eurotunnel
Jonas	BIRZISKIS	Director General	LG	Lithuanian Railways
Elio	CATANIA	Chairman and Chief Executive Officer	FS	Italian Railway Group
Jean-Michel	DANCOISNE	Director General	Thalys	Thalys International
Narcis	DZUMHUR	Managing Director	ŽFBH	Railways of the Federation of Bosnia-Herzegovina
Einar	ENGER	President and Chief Executive Officer	NSB	Norwegian State Railways
Louis	GALLOIS	Chairman of the Board and Chief Executive Officer	SNCF	French National Railway Company
Dimitar	GAYDAROV	Director General	NRIC	Bulgarian National Railway Infrastructure Company
	GIANNAKOS	President and Managing Director	OSE	Hellenic Railways Organisation
Jannie	HAEK	Chief Executive Officer	SNCB/ NMBS HOLDING	Belgian National Railways
Keith	HELLER	Chief Executive Officer	EWS	English, Welsh and Scottish Railways
Martin	HUBER	Chief Executive Officer	ÖBB	Austrian Federal Railways
Antoine	HUREL	Deputy Chief Executive Officer	Connex	Connex
Jan	KOMÁREK	Director General	SŽDC	Czech Railway Infrastructure Administration
Alex	KREMER	Director General and Chairman of the Board of Directors	CFL	Luxembourg National Railway Company
Henri	KUITUNEN	President and Chief Executive Officer	VR	VR-Group – Finnish Railways

III. ABOUT CER

B. MANAGEMENT COMMITTEE AND GENERAL ASSEMBLY MEMBERS

Members of the CER General Assembly (as at 10 May 2005)				
Pavol	KUZMA	Director General and Chairman of the Board of Directors	ŽSSK Cargo	Slovak Rail Freight Company
John	LYNCH	Chairman	CIE	Irish Transport Group
Gunter	MACKINGER	Chief Executive Officer	SLB	Salzburg Regional Railway
Zoltán	MÁNDOKI	Director General	MÁV	Hungarian State Railways
Ondrej	MATEJ	Chairman of the Board of Directors and Director General	ŽSSK	Slovak Railway Operator
Maciej	MECLEWSKI ***	President and Chief Executive Officer	PKP	Polish State Railways
Hartmut	MEHDORN	Chief Executive Officer	DB	German Railway Group
Tomislav Josip	MLINARIĆ	Chairman of the Management Board and General Manager	HŽ	Croatian Railway Company
Sven-Olof	NEHRER	Chairman	ASTOC	Association of Swedish Train Operators
Predrag	NIKOLIĆ	Director General	JŽ	Community of Yugoslav Railways
António	RAMALHO	President of the Board of Directors	CP	Portuguese Railway Company
Carel	ROBBESON	Managing Director	Railion Nederland	Railion Netherlands
János	SALAVECZ	Managing Director	VPE	Hungarian Railway Capacity Allocator
José	SALGUEIRO CARMONA	President of the Board of Directors	RENFE Operadora	National Spanish Railway Operator
Keld	SENGELØV	Chief Executive Officer	DSB	Danish State Railways
Adrian	SHOOTER	Deputy Chairman	ATOC	Association of Train Operating Companies
Csaba	SIKLÓS	Director General	GySEV/RoeEE	Győr-Sopron-Ebenfurth Railway Company
Grigore	SUCIU	Director General and Chairman of the Board of Directors	CFR	Romania National Railway Company
Christian	THING	Managing Director	Railion Danmark	Railion Denmark

III. ABOUT CER

B. MANAGEMENT COMMITTEE AND GENERAL ASSEMBLY MEMBERS

Members of the CER General Assembly (as at 10 May 2005)				
Mathias	TROMP	Chief Executive Officer	BLS	Lötschberg Railway Company
Nasko	TSANEV	Chief Executive Director	BDŽ	Bulgarian State Railways
Aad	VEENMAN	Chief Executive Officer	NS	Dutch Railways
Roman	VESELKA	Director General	ŽSR	Slovak Infrastructure Company
Andrzej	WACH	President and Chief Executive Officer	PKP	Polish State Railways
Benedikt	WEIBEL	UIC President Chief Executive Officer	SBB/CFF/ FFS	Swiss Federal Railways
Boris	ZIVEC	President of the Managing Board and Director General	SŽ	Slovenian Railways
Andris	ZORGEVICS	Chairman of the Board of Directors	LDz	Latvian Railways

III. ABOUT CER

C. CER TEAM

Front row:

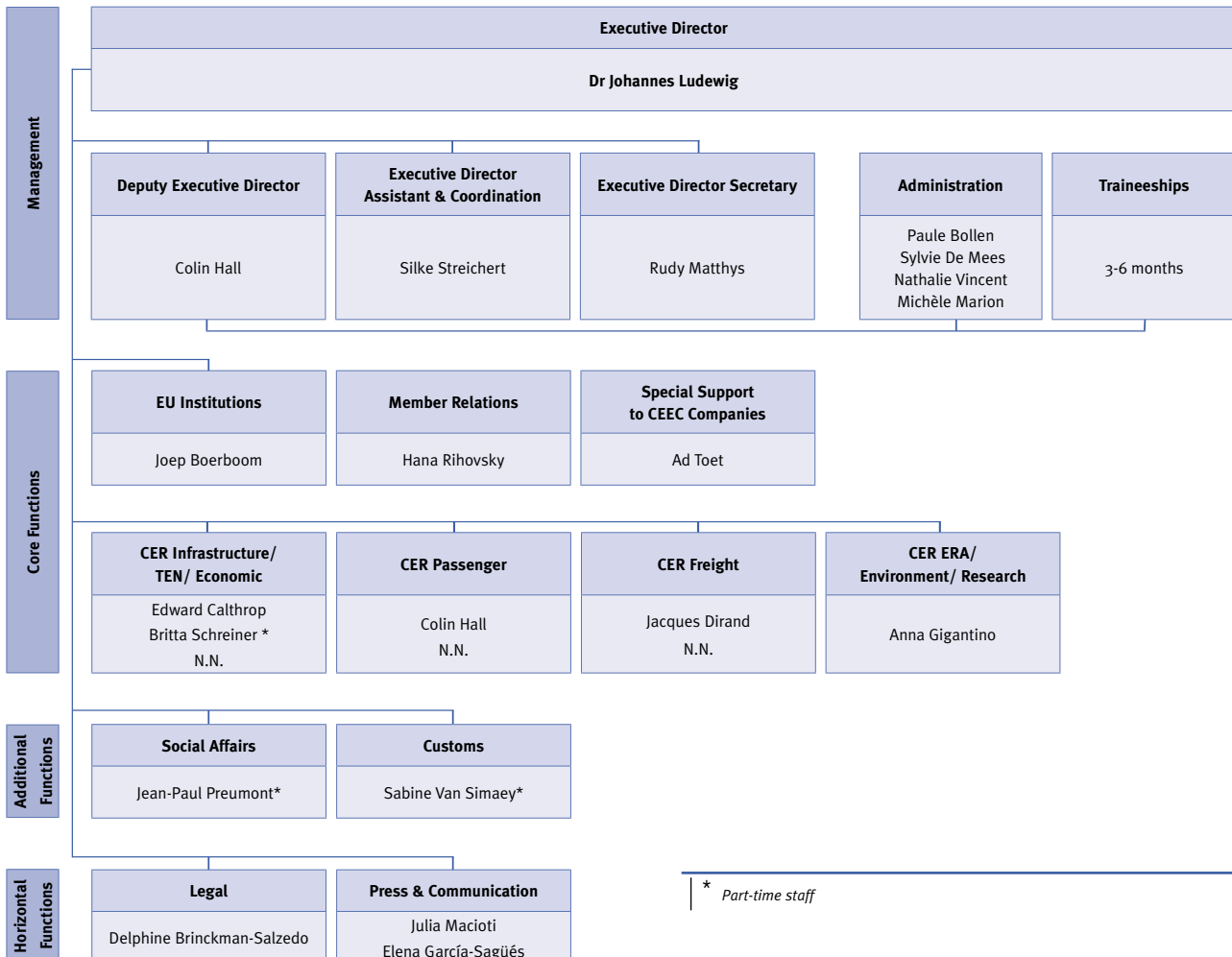
Hana Rihovsky, Ad Toet,
Jean-Paul Preumont,
Johannes Ludewig,
Sabine Van Simaey,
Michèle Marion,
Britta Schreiner,
Delphine Brinckman-Salzedo

Middle row:

Colin Hall, Joep Boerboom,
Jacques Dirand, Paule Bollen,
Kata Sülle (stagiaire),
Edward Calthrop

Back row:

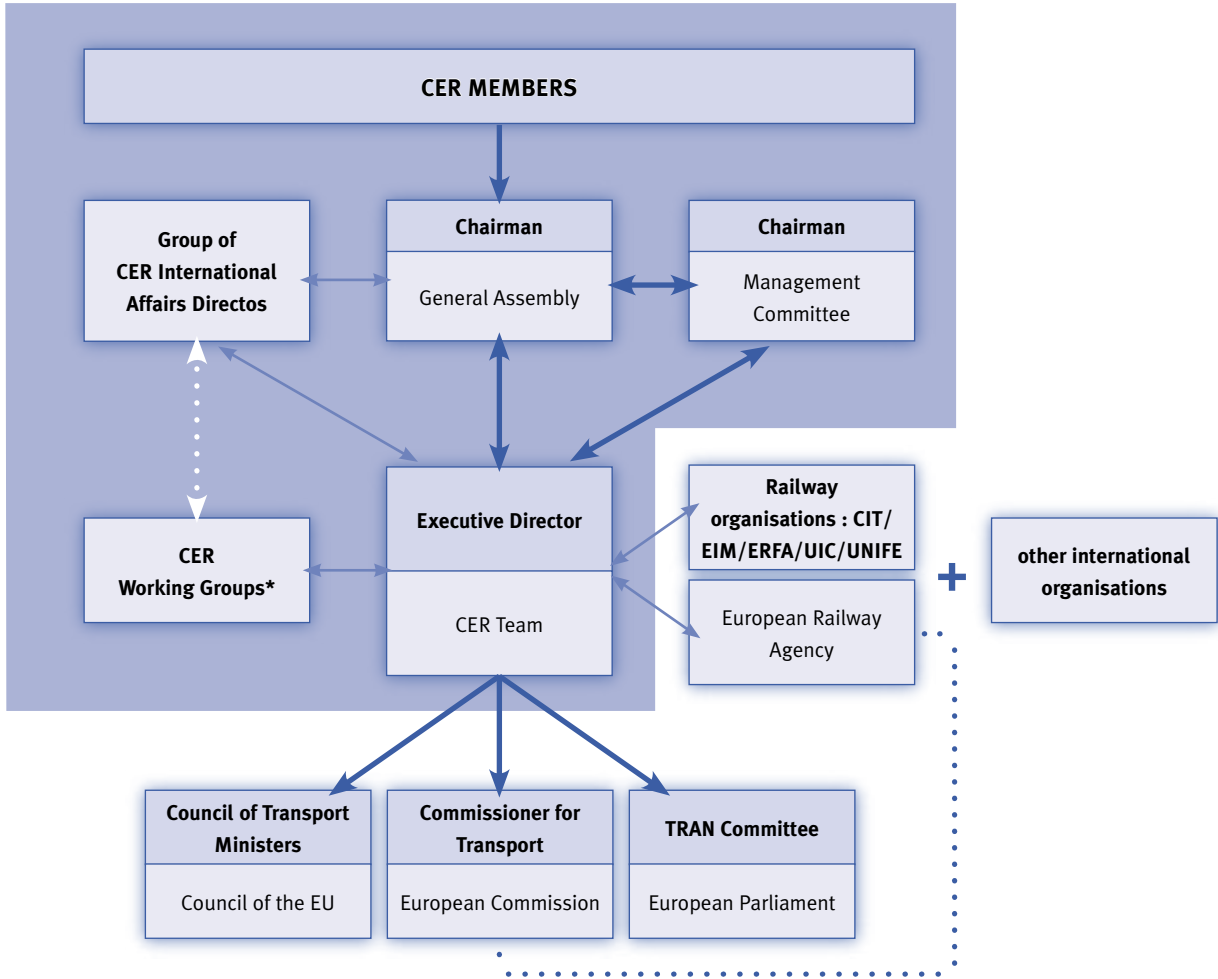
Rudy Matthys, Anna Gigantino,
Julia Maciotti, Silke Streichert,
Elena García-Sagüés,
Nathalie Vincent,
Sylvie De Mees,
Peter Cauwenberghs



* Part-time staff

III. ABOUT CER

D. CER ORGANISATION AND INTERFACES



* e.g. Freight Focus Group, Passenger Working Group, Infrastructure Working Group, Public Service Working Group

III. ABOUT CER

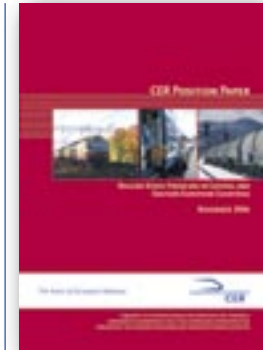
E. CER PUBLICATIONS



December 2004
Rail freight quality:
update report



November 2004
Railways and
the environment



November 2004
Position Paper on rolling
stock financing in Central
and Eastern Europe



November 2004
The railways
in an enlarged Europe



November 2004
Implementation of the
Charter on rail passenger
services in Europe:
update report



October 2004
The true costs of transport



September 2004
European Railway
Legislation Handbook



July 2004
ITS Study on the European
Commission's 2001 White
Paper on transport policy



May 2004
Position Paper
on the Third
Railway Package

III. ABOUT CER

D. CER PUBLICATIONS



September 2003
CER Corridor Study



July 2003
Rail freight quality:
update report



July 2003
Implementation of
the Charter on rail
passenger services in
Europe: update report



Annual Report
2003/2004



Annual Report
2002/2003



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- Book on railway reforms in Europe
- Rail transport as a public service
- Update of freight quality report
- Update of Passenger Charter report

**For regularly published brochures,
position papers and press releases,
please check www.cer.be**

IV. 2004 RAILWAY STATISTICS

CER Member	Country	Length of lines in km	Staff numbers	Passengers carried (millions)	Passenger-kilometres (millions)	Freight in tonnes (millions)	Freight tonne-km (millions)
ASTOC	Sweden	-	10,900	N/A	9,000	N/A	15,500
ATOC	United Kingdom	16,652	N/A	1,030	41,700	-	-
EWS	United Kingdom	-	5,342	-	-	82.5	15,823
BDZ	Bulgaria	-	17,230	38.3	2,628	20.4	5,211.6
BLS	Switzerland	245	1,983	19.3	494	20.7	3,840
ČD	Czech Republic	-	73,825	178.0	6,620	86.4 ^P	16,134 ^P
CFL	Luxembourg	275	3,106	13.7	266	15.8	559
CFR	Romania	10,844	65,568	98.7	8,633	62.8	14,262
CIE	Ireland	1,713	5,547	34.6	1,582	2.1	399
Connex	France	-	N/A	100.0	1,060	8.1	565
CP	Portugal	2,935	4,747	133.6	3,415	9.6	2,281
DB	Germany	34,718	225,512	1,695	70,272	284	83,982
DSB	Denmark	2,323	8,736	160.7	5,704	-	-
Eurotunnel ^{a,d}	France/UK	58	3,205	-	-	-	-
EVR	Estonia	1,280	2,536	-	-	42.8	9,798
FS	Italy	15,915	100,259	504.3	45,577	83.1	23,271
GySEV/ROeEE	Hungary	220	1,851	3.9	182	6.4	634
HZ	Croatia	2,726	14,759	37.0	1,213	14.0	2,733
JZ	Serbia-Montenegro	3,809	26,211	15.7	977	12.2	3,164
LDZ	Latvia	2,269.8	13,342	23.9	810	51.1	16,877
LG	Lithuania	1,782	11,818	7.0	443	45.6	11,637
MAV	Hungary	7,729	50,310	121.2	7,201	45.3	8,270
NRIC ^d	Bulgaria	4,318	15,544	-	-	-	-
NS	Netherlands	2,806	15,703	310.0	14,097	-	-
NSB	Norway	4,077	3,430	46.0	2,290	-	-
ÖBB	Austria	5,656	45,841	188.0	8,259	92.0	19,027

IV. 2004 RAILWAY STATISTICS

CER Member	Country	Length of lines in km	Staff numbers	Passengers carried (millions)	Passenger-kilometres (millions)	Freight in tonnes (millions)	Freight tonne-km (millions)
OSE	Greece	2,319	8,394	9.4	1,668	3.0	592
PKP	Poland	19,576	134,364	272.0	18,626	163.5	47,847
Railion DK	Denmark	-	549	-	-	7.8	2,030
Railion NL	Netherlands	-	1,171	-	-	27.5	4,332
RENFE Operadora	Spain	13,117	29,752	481.9	18,087	26.4	11,554
SLB	Austria	34	150	4.0	N/A	0.9	71
SBB/CFF/FFS	Switzerland	3,087	26,548	253.4	12,565	58.0	10,117
SNCB Holding	Belgium	3,536	39,289	178.0	8,675	58.5	7,691
SNCF	France	-	170,577	931.2	74,014	117.4	45,121
SŽ	Slovenia	1,229	8,227	14.8	764	17.9	3,463
SŽDC ^d	Czech Republic	9,505	528	-	-	-	-
Thalys	Belgium/France	-	106	5,962.0	2,109	-	-
VPE ^b	Hungary	-	12	-	-	-	-
VR	Finland	-	10,748	60.1	3,352	42.7	10,105
ZFBH	Bosnia-Herzegovina	609	3,867	0.23	19.6	5.3	504
ZSSK ^c	Slovakia	-	17,611	50.3	2,227	49.7	9,674
ZSR ^d	Slovakia	3,660	20,970	-	-	-	-

Source: Member contributions unless otherwise noted

P provisional

a Eurotunnel calculates passengers and freight figures in terms of vehicles.

b VPE is a capacity allocation office for the Hungarian public railway network.

VPE does not provide any passenger or freight services, and is not an infrastructure manager.

c ZSSK split into ZSSK and ZSSK Cargo in 2005. These figures include both companies.

d Infrastructure company only.

- Not applicable

N/A Not available



The Community of European Railway and Infrastructure Companies (CER) brings together 44 railway undertakings and infrastructure companies from the European Union, the accession countries (Bulgaria, Croatia and Romania) as well as Bosnia/Hercegovina, Serbia/Montenegro, Norway and Switzerland. It is based in Brussels and represents its members' interests vis-à-vis the European Parliament, Commission and Council of Ministers as well as other policy makers and transport actors. CER's main focus is promoting the development of rail as essential to the creation of a sustainable transport system which is both efficient and environmentally sound. A key priority in this respect for CER is the achievement of a more balanced modal split in the transport system, minimising external costs arising to society and improving economic efficiency. In parallel to the railways' own initiatives for improving the quality of rail services, CER sees ensuring sufficient investment in infrastructure rail projects as a prerequisite for achieving the desired modal split. All policy areas of significance to railway transport are dealt with by CER, which offers advice and recommendations to European policy makers. CER monitors and contributes to railway policy making. Its interests span the whole spectrum of European transport policy: infrastructure planning, passenger and freight services, public service, the environment, research and development and social dialogue.

www.cer.be



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



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