

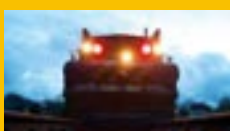
# ANNUAL REPORT 2006/2007

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SINCE 1957

*The Voice of European Railways*



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





**CER**

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## FOREWORD

“Time to decide”. Looking back on the news headlines in 2006/2007, the title of the 2001 White Paper on transport policy seems to be more true than ever. The Stern Report in the UK, the United Nations’ IPCC reports as well as tangible climate changes in the Northern Hemisphere have heightened the public’s awareness of the urgency to fight global warming, and moved up the environment on the political agenda.

For Europe’s railways, this should be good news. Rail transport is the most environmentally friendly mode of transport. Transporting goods by train generates only about 20% of the CO<sub>2</sub> emissions generated by road transport (on a tonne-kilometre basis). For passengers, travelling by air produces 75% more CO<sub>2</sub> than taking the train.

However, the link between environment policy targets and transport policy still needs to be strengthened. Believe it or not: European legislation today extensively restricts the possibility to take into account environmental damage caused by transport when setting the level of infrastructure charges, such as road tolls.

In other words, prices are not allowed to reflect these costs. In Switzerland this is possible; as a result, much more goods are transported by rail through the country and across the sensitive ecosystem of the Alps than in the EU Member States. For this reason the European railways are impatient with the Commission that is preparing a model for assessing external costs for transport. The deadline for this study is June 2008. In practice, this means that the implementation of a new Eurovignette Directive, revised on the basis of this study, would probably not become a reality before 2011. In the meantime, the climate is changing!

However, the trains are running — despite unbalanced and unfair intermodal competition conditions. For the first time in decades in the EU-15, rail freight transport has stabilised its market share, which had previously been in continuous decline. Moreover, freight transport in Europe in general is growing, and so is the transport of goods by rail. Since January 2007, this growing European rail freight market is open. Liberalisation has brought about a significant increase in companies in the market (and 11 new members in CER in 2006/2007).

Among the CER activities in 2006/2007, rail freight transport had a prominent role. CER raised once more the question of how the rail infrastructure capacity can accommodate the growing demand. We have launched a broad study of several corridors to propose concrete answers to this question. Together with our partners, we finalised a strategy plan on how to implement telematic applications in rail freight. Finally, CER published a book and organised a conference on the topic of the 2007 market opening to mark the historic milestone.

Environment and rail freight transport were selected as the main topics of this annual report to illustrate CER’s activities in 2006/2007. In addition, we give a short summary on the other important developments in the rail transport sector last year.

As usual, you will find a statistics section, a chronology of political events as well as information on CER and its members.

We hope this annual report will provide you with interesting facts, stimulating ideas and a good overview on what keeps CER, its staff and its members going every day.



Aad Veenmann  
CER Chairman



Johannes Ludewig  
CER Executive Director



## THE ENVIRONMENTAL PROFILE OF EU TRANSPORT POLICY

European citizens may have to become used to an increasing number of storms, floods, heat waves or droughts in the near future. Europe is warming up faster than the global average, and temperatures could rise between 1.8° C and 4.0° C by the end of the century<sup>1</sup>. As transport produces a significant amount of greenhouse gas emissions — a major cause of this climate change — environmental policy and transport policy must work together.

### A growing awareness

Last year, a number of initiatives raised international public awareness of the dramatic consequences of climate change and, finally, drew major media attention to this important issue. Using the film “An inconvenient Truth”, a documentary presenting scientific evidence on global warming, former US Vice-President Al Gore, contributed to stoking the debate. The academic and scientific community continued to explore the effects of climate change in greater detail. In particular, the Intergovernmental Panel on Climate Change (IPCC)<sup>2</sup> is now finalising its Fourth Assessment Report “Climate Change 2007” on the basis of reports by three Working Groups that provide a comprehensive and up-to-date assessment of the current state of knowledge on climate change. Another example is Sir Nicholas Stern’s review of the economics of climate change<sup>3</sup>, which triggered much public interest by highlighting the economic costs of non-action (between 5% and 20% of Gross Domestic Product each year in the long run). The report called for immediate and firm action to slow down the rise in global temperature.



1. For more information, please consult: <http://themes.eea.europa.eu/EnvironmentalIssues/climate>.
2. Find more information on the website: <http://www.ipcc.ch>.
3. The full review can be accessed on [http://www.hm-treasury.gov.uk/independent\\_reviews/stern\\_review\\_economics\\_climate\\_change/sternreview\\_index.cfm](http://www.hm-treasury.gov.uk/independent_reviews/stern_review_economics_climate_change/sternreview_index.cfm)



## The EU's attempt at demonstrating leadership

The increased sensitivity of public opinion and the inclusion of this broader international perspective provide the background to the latest European Union (EU) initiatives in the fields of environment, energy and transport. The new drive came from all EU institutions — even from the highest political levels — and has resulted in general and sector-specific proposals. As a first step, the European Council revised the EU Sustainable Development Strategy<sup>4</sup> in June 2006, thereby putting clean energy, climate change and sustainable transport at the top of the EU's priority list.

The Commission turned the objectives determined by the Heads of State and Government into more specific proposals. Energy, for example, is featuring high on the EU agenda. The Member States' growing energy needs and their ever increasing dependency on other countries' resources became obvious when Russia's conflict with Belarus over oil pricing and transit fees led to a temporary disruption of Russian oil supply to a number of EU Member States in January 2007. It is against this alarming background that the Commission came up with two major initiatives over the last few months: an action plan on energy efficiency<sup>5</sup>, and an integrated package of measures to fight climate change and foster the EU's energy security and competitiveness<sup>6</sup>. Important and concrete targets were set or re-emphasised. By 2020, energy efficiency has to improve by 20%, the market share of renewable energy sources has to reach 20%, bio-fuels making up 10% of transport fuels. More importantly, in parallel with these new measures linked to EU energy policy, the Commission proposed that — as part of a new global agreement to prevent climate change from reaching dangerous levels — by 2020 developed countries cut their greenhouse gas emissions by 30%, on average, based on their 1990 levels. The EU also made an independent commitment to cut its emissions by at least 20% even before a global agreement is reached, irrespective of what other countries do. These commitments were subsequently endorsed by the EU Environment Ministers, as well as Heads of State and Government, thereby showing their high political value.

Last year, the European Commission also prepared the next phase of the implementation of the European Climate Change Programme (ECCP), and in particular, the second trading period of the European Emissions Trading Scheme (ETS) running from 2008 to 2012. This coincides with the five-year period in which the EU and Member States must meet their targets for limiting or reducing emissions of greenhouse gases under the Kyoto Protocol on climate change. The National Allocation Plans (NAPs), which set precise targets for the reduction of emissions, were therefore important to ensure that Member States' Kyoto commitments could be achieved. However, as 15 Member States failed to produce their NAP before June 2006 or failed to communicate data, the Commission had to open or continue a number of infringement proceedings. At the time of writing, most plans had been approved, but some were still subject to serious reservations by the Commission. This brief overview of the latest EU activities in the fields of energy and climate change shows that the EU considers these issues priorities and wishes to take the lead in post-Kyoto international negotiations. The question remains: Is the EU doing enough? Is the EU translating these ambitious environmental targets into concrete measures in all relevant sectors? Taking a closer look at the transport policy, the observer may be left with some doubts.

4 Council of the European Union: Review of the EU Sustainable Development Strategy, 10117/06, 9 June 2006.

5. October 2006, see the European Commission website for more information: [http://ec.europa.eu/energy/action\\_plan\\_energy\\_efficiency/index\\_en.htm](http://ec.europa.eu/energy/action_plan_energy_efficiency/index_en.htm).

6. January 2007, for more information, see: [http://ec.europa.eu/energy/energy\\_policy/documents\\_en.htm](http://ec.europa.eu/energy/energy_policy/documents_en.htm).

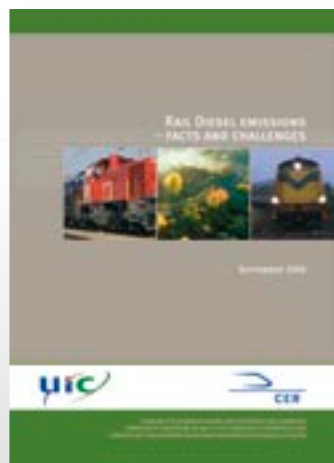
### Transport remains insufficiently integrated in the current debate

The 2006 review of the European transport policy was a good example of the ambivalence of some EU initiatives. In a recent report, the European Environment Agency (EEA - an EU body) questioned the environment credentials of the 2006 mid-term review of the White Paper on European transport policy<sup>7</sup>. Transport is currently responsible for 21% of all greenhouse gas emissions in the EU-15 (excluding international aviation and maritime transport), thus offering the means to make a difference in mitigating climate change. On the one hand, the EEA finds it positive that the recent review reiterated the objective of an EU sustainable transport policy, clearly identified the growing negative impacts of transport, and put the emphasis on new tools such as environmentally friendly innovation, fiscal instruments and state aid. On the other hand, the Agency is concerned that the review failed to provide concrete environmental targets and abandoned the objective set in the 2001 White Paper to limit transport growth. The EEA argues that certain types of environmental impacts from transport, including greenhouse gas emissions, are closely tied to transport volumes. Therefore, such a change seriously threatens the EU's ability to fulfil its Kyoto commitments.

A similar ambivalence in environmental commitments can be found in EU initiatives in the air sector. With an 86% increase between 1990 and 2004, EU emissions from international air transport are growing faster than in any other sector, which calls for urgent action. In December 2006, the European Commission took an important step when they proposed to include these emissions in the European ETS<sup>8</sup>. But environmentalists criticised the weakness of this plan, arguing that it would reduce aviation emissions by just 3% (which is equivalent to less than one year's growth of the sector's emissions) and that without accompanying measures — such as a tax on kerosene — the scheme would not be effective<sup>9</sup>.

Finally, Member States do not always consider the environmental impact of their transport policies. For example, in a recent report the EEA underlined that transport subsidies (i.e. direct transfers and tax deductions) affected the environment at different levels<sup>10</sup>. Public subsidies can influence the environmental performance of vehicles or change transport management decisions such as the volume and composition of vehicles. Moreover, these subsidies “affect modal share by altering the price competitiveness among different modes of transport” and lead to an increase in transport demand by lowering the costs of transport. Environmental impacts should thus also be better considered in national decisions to allocate public funding for transport.

7. European Environment Agency: Transport and Environment: on the way to a new common transport policy (TERM 2006: indicators tracking transport and environment in the European Union), Copenhagen 2007.
8. Proposal for a Directive of the European Parliament and of the Council amending Directive 2003/87/EC so as to include aviation activities in the scheme for greenhouse gas emission allowance trading within the Community, COM(2006) 0818, 20 December 2006.
9. Transport & Environment: EU Aviation Emissions Scheme too weak, 20 December 2006. See <http://www.transportenvironment.org/Article337.html>.
10. European Environment Agency: Size, structure and distribution of transport subsidies in Europe, Technical report n° 3/2007, Copenhagen 2007.



In September 2006, CER published, in cooperation with UIC *Rail Diesel emissions – facts and challenges*, a brochure summarising the contents of the successful Rail Diesel Study which showed the status of possible emission reduction measures in terms of costs and benefits.



### Railways are essential partners to reach environmental targets

The environmental credentials of rail transport are well known: for the transport of goods, rail transport generates, on average, only a fifth of the CO<sub>2</sub> emitted by road traffic<sup>11</sup> (see also figure 1). Despite this fact, rail transport still suffers from a legal obstacle that not only disregards its environmental performance but also discriminates against rail in relation to other modes of transport.

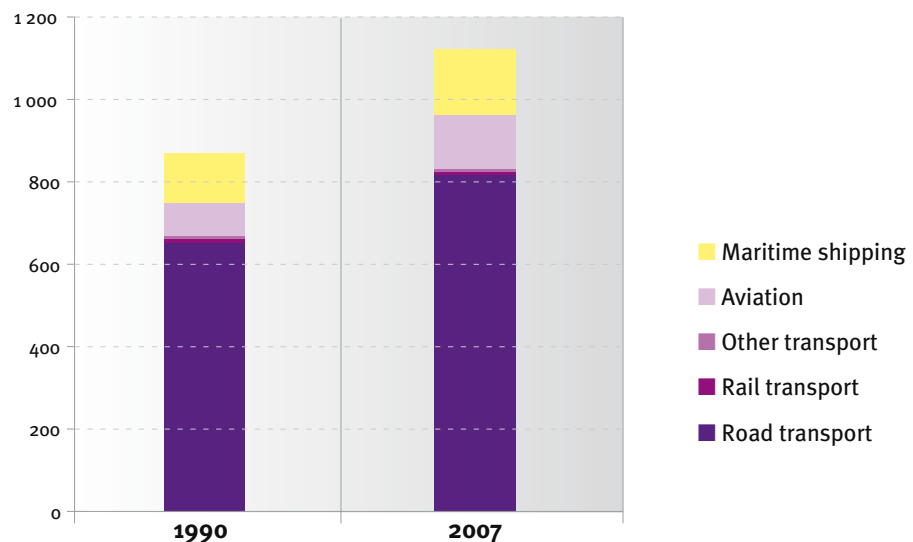
While rail has been included in the ETS scheme right from the start, proposals to include aviation are only being debated now. In addition, the absence of kerosene tax in air transport is certainly not favouring long-distance rail transport. But the most important problem by far is that the EU is still struggling to implement a fair infrastructure charging policy across transport modes. Following the revision of the Eurovignette Directive in 2005, EU Member States are still not allowed to set road charges that take external costs into account. This puts rail at a clear competitive disadvantage. It is crucial that the Commission speeds up the process leading to a revision of this Directive, by creating a model for the assessment of external costs for transport as well as an analysis of their internalisation as soon as possible.

Although the EU is stepping up its efforts in the environment and energy fields, the transport policy appears to be insufficiently linked to these initiatives. This puts the consistency, but also the credibility of the EU initiatives at risk. Rail is ready to play its part in the development of a more sustainable transport policy. The EU should create the conditions for that to happen.



11. Allianz pro Schiene: Umweltschonend mobil. Bahn, Auto, Flugzeug, Schiff im Umweltvergleich, December 2003.

Figure 1: Greenhouse gas emissions from transport (million tonne)



Source: EEA

## REVIEWING EUROPEAN TRANSPORT POLICY: ADAPTING TO NEW NEEDS?

The 2001 White Paper on transport policy highlighted the need for transport to become sustainable “from an economic and social, as well as an environmental point of view<sup>12</sup>”, introducing the idea that transport growth should be decoupled from economic growth. In other words, the economy should grow without automatically bringing about an increase of greenhouse gas and emissions, noise, congestion and other negative effects of freight transport.

For most observers, the 2001 White Paper offered a sound analysis of the key challenges facing the European transport sector at the beginning of the 21<sup>st</sup> century. It included an ambitious – albeit contested – package of measures aimed, in particular, at shifting the balance between transport modes in favour of rail, and combating congestion. What did the mid-term review of 22 June 2006 change?

While the European Commission reiterated the main objective of an EU sustainable transport policy, it slightly revised its approach. First, it replaced the concept of “decoupling” with the objective of “disconnecting mobility from its negative side effects”, thereby renouncing to limit transport growth. A few months later, this was criticised by the European Environment Agency and other environmental organisations: the change is deemed incompatible with the targets for the reduction of EU greenhouse gas emissions set by the European Council itself. In addition, the White Paper mid-term review was also criticised for failing to set concrete environmental targets, thus damaging the readability and credibility of the EU commitment for a sustainable transport system. (See the previous article in this report.)

12. European Commission: European transport policy for 2010: time to decide, COM(2001) 370 final, 12 September 2001, p. 6.



In September 2006, CER published its *Position Paper on the Mid-term Review of the European Commission's 2001 Transport White Paper*, focusing on the main policy objectives and instruments relevant to the rail sector, such as the optimisation of all transport modes in combination with ‘co-modality’, the serious lack of financial resources for building and maintaining transport infrastructure, the assessment of external costs and the issue of energy taxation.

## REVIEWING EUROPEAN TRANSPORT POLICY: ADAPTING TO NEW NEEDS?



Second, by introducing new concepts such as “co-modality” and referring to the need to diversify its “tool box”, the review sought to emphasise the importance of efficient logistic chains and to equally engage with all transport modes.

Nevertheless, the Commission did renew its objective of shifting transport to more environmentally friendly modes “where appropriate, especially on long distance, in urban areas and on congested corridors<sup>13</sup>”.

CER very much welcomed this continued support for the rail sector and considers it an important commitment towards sustainability in the European transport system. However, while CER agreed with the Commission’s recognition of the serious lack of financial resources for building and maintaining transport infrastructure, it very much regretted the absence of concepts or new initiatives to improve this situation.

13. Idem, pages 4 and 21.

## SENSITIVE CHALLENGES : PROGRESS ON RAIL FREIGHT NOISE

**While the environmental credentials of rail transport are high, there is still one challenge the railways are working on: reducing the rolling noise of wagons. Railways make noise mainly due to the contact of rough wheels with rough steel(or iron) tracks. The solution to reduce noise at the source seems to be obvious: keep wheels and tracks as smooth as possible.**



The wheel roughness of freight wagons comes from cast iron brake shoes rubbing the bearing surface of the wheel. The technical solution is to replace cast-iron brake blocks with synthetic brake blocks which do not damage the surface of the wheels when braking. One technology, called LL brake shoes, is still in the process of being approved for serial production. However, another type of composite brake shoe is already available on the market, namely K-blocks. Already in 2002, the member companies of CER, the International Union of Railways (UIC) and the International Union of Private Wagons (UIP) decided to equip all new wagons with these K-blocks. However, K-blocks have one disadvantage compared to LL-blocks: they require reconfiguration of the braking system of a vehicle and thus substantial investment, if an existing wagon is to be retrofitted.

This kind of noise reduction at the source has the obvious advantage of having a net-wide effect — other than, for example, physical noise barriers along the lines. However, it does pose two major challenges: first, freight wagons have a very long life span. So, the longer the life span of a wagon, the worse the condition of its wheels. Second, due to liberalisation, the number of different companies running on a line is multiplying all the time. In order to reduce noise for residents along a line, all stakeholders need to take measures. Currently only 8 500 wagons — out of 600 000 in operation — in Europe are equipped with synthetic braking shoes or have been ordered.



*To bring about efficient and sustainable railway noise reduction, the International Union of Railways (UIC), the Community of European Railways and Infrastructure Companies (CER) and the International Union of Private Wagons (UIP) initiated the Freight Traffic Noise Reduction Action Programme already in 1998. The aim of the programme was to introduce low-noise technology in freight traffic, as it is the main source of railway noise.*



## SENSITIVE CHALLENGES : PROGRESS ON RAIL FREIGHT NOISE



Even if retrofitting the freight wagon fleet with composite brake blocks is the most cost-effective option from the railway system's perspective, the financial investment is substantial for the individual railway operator. Retrofitting a wagon with K-blocks requires redesigning the braking system which costs €4 500 for every single wagon. This means that for a company like Railion in Germany, the retrofitting of 135 000 wagons would amount to €600 million. The costs of the braking shoes themselves — which for the time being are still higher than for cast-iron breaking shoes — add to these retrofitting costs. It is clear that railway operators cannot retrofit the European fleet within a reasonable period of time without public financial support.

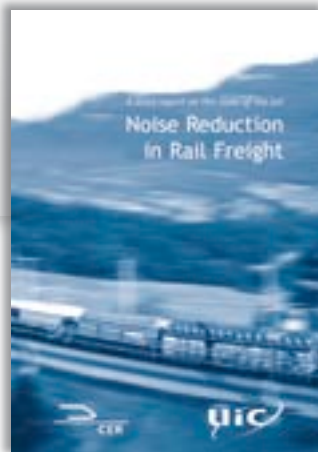
Developing financing schemes is currently on the agenda of several Member States as well as the European Commission. The Commission should make sure that financial support by Member States for retrofitting of rolling stock with composite blocks is not hindered by state aid legislation.

Part of the funding could be gained from savings due to a reduction in physical noise barriers. Today, Member States invest much in building noise barriers along railway lines. According to a recent UIC study, the cumulated expenditures for infrastructure related noise protection measures up to the end of 2005 were in the order of €600 million<sup>14</sup>. As rail freight traffic and public sensitivity for noise emissions grow, these expenditures are likely to increase. According to UIC, they are expected to reach up to €10 billion. It is in the interest of governments to keep these investments as low as possible but also to benefit as much as possible. National action plans for noise reduction should therefore include the retrofitting of the freight wagon fleet.

The Commission announced a Communication — on rail noise abatement measures addressing the existing fleets — to be adopted in November 2007. The goal is to identify and promote cost-efficient measures to reduce rail noise from the existing fleet both by means of financial incentives and legislative measures. CER is a partner in the preparation process for this Communication.

Noise reduction is a good example for the rail sector's commitment for a sustainable transport system.

In May 2007, CER and UIC will publish two status reports on noise reduction abatement measures currently applied on Europe's trains and railway infrastructure. They are based on the data received from the companies implementing noise abatements programmes.



<sup>14</sup> UIC: Status report noise abatement on European railway infrastructure, January 2007.





## MARKET OPENING AND INFRASTRUCTURE : RAIL FREIGHT NEEDS A PRIORITY NETWORK

**1 January 2007 was a milestone in European rail history: the European rail freight market was finally opened completely. For decades, EU Member States had one national rail freight carrier, and international traffic was only possible in cooperation with these national carriers. Now no Member State can deny any European freight carrier access to its market. Different carriers can compete for the same business. This is an important legal step in the process of creating an integrated European rail sector.**



The full market opening was the final step of the liberalisation process that started in the early 1990s. Several Directives (including Directive 91/440/EEC and the subsequent First Railway Package) initiated the process of opening the rail freight sector to competition. The liberalisation process was taken one step further with the adoption of the Second Railway Package in April 2004. Amongst others, it opened (in Directive 2004/51/EC) the market for international freight services from 1 January 2006 as well as the market for national freight transport (“cabotage”) from 1 January 2007. CER, the main representative body of the rail sector in Europe, played an important role in bringing about the compromise in spring 2003 in the Transport Council under the Greek presidency – a compromise which ensured that this critical Directive was finally adopted. To mark the historic date of the complete opening of the rail freight market, CER organised the EurailFreight conference on 30 January 2007 (see page 15).

A few months later, it is clear that the trend, already observed in some countries well before 1 January 2007<sup>15</sup>, has kept its momentum. Competition is gradually reaching all countries in Europe. On the whole, there are now almost 700 licensed companies in the EU that offer rail transport services.

Competition in rail freight is especially marked on certain corridors, for example the Rotterdam-Genoa corridor, which links the biggest European seaport with the industry regions in Western Germany and Northern Italy. On this corridor, strong intramodal competition is emerging.

Rail transport can demonstrate its intrinsic benefits best over long distances, which is why CER has always promoted the development of European corridors to improve rail freight performance. Having started in 2003, CER has launched several studies to investigate this subject even more in the course of last year. The corridor approach has been taken over by others, most notably in the framework of the Memorandum of Understanding for the implementation of ERTMS in Europe, with its six ERTMS corridors.

The European rail freight market is also growing. After years of decline, the market share of rail freight has stabilised in the first years of the 21<sup>st</sup> century, and has started to grow in recent years in some countries. Across Europe, rail freight traffic in tonne-kilometre has grown by +13.2% since 2001. Several operators saw growth rates reach double figures.

<sup>15</sup> Some countries opened their rail markets to competition already more than 10 years ago. The frontrunners were Sweden in 1988/ 1996, the UK in 1994 /1997 and Germany in 1994/1999.



## MARKET OPENING AND INFRASTRUCTURE : RAIL FREIGHT NEEDS A PRIORITY NETWORK

However, it is equally clear that in this growing market — both in terms of number of operators and volumes transported — congestion on the tracks has not subsided. Freight still shares critical parts of the network with passenger transport. For this reason, CER was delighted to learn that the Commission put the subject of a Dedicated Rail Freight Network in its work programme again. This idea dates back to the 2001 White Paper on European transport policy: “Step by step, a network of railway lines must be dedicated exclusively to goods services so that, commercially, railway companies attach as much importance to goods as to passengers<sup>16</sup>”. Since then the idea had not been further developed, but the Commission announced a Communication on this topic by October 2007.

CER fully agrees that there is a need for a rail network that is better equipped to accommodate rail freight. However, a fully dedicated freight network is not realistic in the short and medium term. This does not mean that the idea should be abandoned altogether, quite the contrary. Steps should be taken to prepare a dedicated network, while taking into account the reality of today’s network. CER therefore proposes the establishment of a “Primary European Rail Freight Network (PERFN)”. This network would consist of a number of dedicated lines around or along congested sections and nodes, coupled with mixed passenger and freight lines with enough capacity to accommodate the entire demand for rail freight services.

The problem with the rail infrastructure network today is that it was designed and built more than 100 years ago. Since then, technology has developed at very fast speed, and traffic volumes have exploded. For many years, the railway community has recognised the need for sufficient and modern infrastructure. As the network cannot be changed overnight, CER initiated, several years ago, a discussion focusing on trans-European corridors, where the potential of rail freight can be best optimised. This idea has been taken up by politicians as well, for instance with the trans-European network (TEN) and the six corridors chosen to implement the European Rail Traffic Management System (ERTMS). These important initiatives are illustrations of how the corridor approach is a necessary first step for the coherent development of any large investment project on a network.



CER’s ideas for a Primary European Rail Freight Network also focus, as a first step, on freight relevant corridors in Europe. Some corridors have already been studied in detail, and others are currently being studied or will be studied, with the aim of identifying infrastructure investments targeted in such a way that rail freight productivity can be increased and that rail can make its full contribution to reaching the objective of sustainable growth and employment laid down in the Lisbon Strategy<sup>17</sup>.

Several recent studies, for instance the ERIM<sup>18</sup> study and the TEN-STAC<sup>19</sup> study, forecast that rail freight demand is likely to grow by at least 65% between 2005 and 2020. The existing rail network is not able to absorb such an increase in demand. Therefore, the primary purpose of progressively establishing a Primary European Rail Freight Network should be to meet the challenge of such an increase.

Some questions arise when designing a network more oriented to freight. How can we best increase rail freight productivity? Do we need to invest in a rail infrastructure which can handle longer trains? Higher trains? Heavier trains? Faster trains? The answers are obviously dependent on the types of goods transported on the network. Because studies are still being carried out, there is not yet a complete picture of the situation in the whole of Europe. The results of the first studies (on the corridors Benelux-Italy and Sweden-Italy) are already available. They do not necessarily apply to the whole network, but they give a first indication of those infrastructure improvements most needed.

16. European Commission: European transport policy for 2010: time to decide, COM(2001) 370 final, 12 September 2001, p. 13.
17. The Lisbon Strategy was set out by the European Council in Lisbon on March 2000. Its goal is making the EU “the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion”. The broader objectives of the Lisbon strategy are to be attained by 2010.
18. ERIM: European Rail Infrastructure Masterplan, carried out by UIC in 2006.
19. TEN-STAC: Scenarios, Traffic Forecasts and Analyses of Corridors on the Trans-European Transport Network, ordered by the European Commission carried out by the Dutch consultancy NEA in 2004.

## MARKET OPENING AND INFRASTRUCTURE : RAIL FREIGHT NEEDS A PRIORITY NETWORK



For instance, the Sweden-Italy corridor mostly serves the intermodal market, a market primarily consisting of light, voluminous goods. For such goods, the capacity of the track to support heavy trains is not so crucial. The most important parameter for improving productivity is train length. Therefore, on this corridor, this is the most important infrastructure parameter which needs to be harmonised. On the corridor Benelux-Italy, train length has to be harmonised and line sections upgraded in such a way that the loading gauge along the whole corridor does not fall below the size needed for transporting the largest sea high-cube container. Other parameters, such as axle load and (technical) train speed would offer fewer benefits and would most likely not offset the huge costs associated with such upgrades.

Once the necessary investments have been identified on a corridor, the sequence and timing of these investments must be defined from a perspective that takes the whole corridor into account, so that the corridor can progressively increase its traffic volumes and productivity, following market demand. The studies on other corridors now and in future will provide the necessary data to compile a European infrastructure investment plan which is oriented to respond to actual market needs.

The ultimate goal is to provide a full model of the Primary Freight Network with the objective of meeting future freight traffic needs and accommodating the expected increase. On the basis of this model, Member States will be encouraged to coordinate their efforts to turn this model into reality. One particularly important element will be to convince Member States to move away from the old tradition of defining national infrastructure investment plans independently from one another but rather to coordinate infrastructure investments at corridor level. European institutions will be invited to facilitate this process of coordination of investments between Member States.



## POLITICAL COMMITMENT FOR RAIL FREIGHT : CER EURAILFREIGHT 2007

To mark the full opening of the European rail freight market on 1 January 2007, CER — in cooperation with the German EU presidency — organised the EurailFreight Conference 2007 on 30 January 2007 in Brussels. Similar to previous CER EurailFreight conferences, CER offered a platform for 300 participants from the sector to attend high-level presentations and debates, network and discuss the current matters of European transport policy.

Wolfgang Tiefensee, German Transport Minister and Head of the EU Transport Council, and Jacques Barrot, Commission Vice President in charge of Transport, acknowledged in their keynote speeches this crucial phase for rail freight companies. Both expressed support for initiatives to increase efficiency and productivity of rail freight and logistic services in Europe. It was confirmed that a substantial shift of freight from road to rail is still needed, in line with efficiency targets and the fight against pollution and climate change in Europe.

During five thematic sessions, high-level speakers discussed the challenges for rail freight as well as political actions required, covering issues such as interoperability, the development of European rail freight corridors and financing.

This pan-European event brought together 300 participants, including representatives of the European institutions, other freight modes, academics, consultants, the railway sector in Europe and — for the first time — guests from Russia, China and North America who presented their views and experience on trans-European rail traffic.

With the signing of a EurailFreight Declaration during the conference, CER, UIC, EIM and UNIFE — the four organisations representing rail freight operators, infrastructure managers and manufacturers — committed themselves to contribute to a sustainable freight transport system throughout Europe.

Presentations and speeches delivered at the conference are available on the CER website: [www.cer.be](http://www.cer.be) • calendar • CER events • past events.



Panellists at the EurailFreight 2007 conference: Bert Klerk, EIM Chairman, André Navarri, UNIFE Chairman, Paolo Costa, MEP (Alde/Italy), Jacques Barrot, Vice-President of the European Commission, Christian Wolmar, moderator, Wolfgang Tiefensee, German Federal Minister of Transport, Aad Veenman, CER Chairman, Luc Aliadière, UIC Chief Executive.

## COMMUNICATION IN RAIL FREIGHT: IMPLEMENTING TELEMATIC APPLICATIONS FOR FREIGHT

**CER, on behalf of the other railway associations, delivered the Strategic European Deployment Plan for the implementation of the TAF TSI (Telematic Applications for Freight — Technical Specification for Interoperability) Regulation to the European Commission on 19 January 2007.**

The TAF TSI Regulation defines the common standards which railway operators and infrastructure managers will have to apply in the coming years in exchanging data concerning rail freight services. The purpose is to improve the management of rail freight consignments all over Europe by increasing the quantity and the quality of transport-related information (including transport information for the customer). The Regulation also required that the European railways deliver a Strategic European Deployment Plan (SEDP) describing how they will progressively implement the new standards.



Following the delivery by CER of the Strategic European Deployment Plan for the implementation of the TAF TSI Regulation to the European Commission, CER published in May 2007 the brochure *Information interchange in rail freight. Improving customer service by innovative use of the Telematic Applications for Freight Regulation*. The publication gives a comprehensive overview on the topic for a wider public and explains what is at stake for the railway sector and the customers.

With this plan, the European railways are not just fulfilling a legal requirement, but, more importantly, demonstrating their collective commitment to providing better service and information to their customers. The railways are not simply delivering several individual plans with no connection between them. They are moving together in a coordinated way, in line with the very spirit of the Regulation when it was written in 2005.

The Strategic European Deployment Plan was developed in cooperation with other relevant European railway organisations, in particular the International Union of Railways (UIC) and European Rail Infrastructure Managers (EIM). The project was co-financed by the railway community and the EU from the trans-European transport networks budget. The implementation of the plan will extend until 2013 under the leadership of Jan Sundling, CEO of the Swedish operator Green Cargo, and since April 2007 European coordinator for the TAF TSI implementation.

## COMPETITION IN EUROPE'S RAIL FREIGHT MARKET : NEW CER BOOK

To celebrate the full opening of the European rail freight market, CER launched its third railway book, following the European railway legislation handbook and the book on railway reform in Europe. This book, "Competition in Europe's rail freight market", brings together 13 academics, top business executives and politicians who give their views on the current challenges facing the sector and describe future scenarios.

In an introductory chapter, Christoph Wolff from McKinsey&Co. looks at the rail freight markets in Europe and beyond. In the first part of the book, focusing on the politics of rail freight, Chris Nash from Leeds University gives a detailed insight into the theory and practice of infrastructure charging, one of the most important regulatory topics in European transport policy. James Runde from Morgan Stanley adds a chapter on financing railways, while Karla Peijs (a former Dutch Transport Minister), Karel Vinck (the European ERTMS coordinator) and Vladimir Yakunin (CEO of Russian Railways RZD) look at concrete initiatives for improving framework conditions.

In the second part of the book, four top business executives deal with the requirements from the operator and customer's perspective. Eva Molnar, lecturer at Budapest University and former transport sector manager at the World Bank, gives a detailed account of the developments in Central and Eastern Europe. Two chapters assess the opportunities arising from innovation and technology as contributions to a sustainable rail freight transport system.



The CER books can be ordered from the publisher:  
Deutscher Verkehrs-Verlag GmbH/Eurailpress  
Nordkanalstrasse 36  
D-20091 Hamburg  
info@eurailpress.com  
<http://www.eurailpress.com>

### Other CER books

*Community of European Railways and Infrastructure Companies (ed.): European Railway Legislation Handbook*  
In three languages: English, German and French  
Hamburg 2004  
560 pages, hardcover  
ISBN: 978-3-7771-0314-3  
price: € 64

*Community of European Railway and Infrastructure Companies (ed.): Reforming Europe's Railways - An assessment of progress*  
Hamburg 2005  
194 pages, hardcover  
ISBN: 978-3-7771-0334-1  
price: € 38

*Community of European Railway and Infrastructure Companies (ed.): Eisenbahnreformen in Europa - Eine Standortbestimmung*  
Hamburg 2005  
214 pages, hardcover  
ISBN 978-3-7771-0336-5  
price: € 38



## HIGH LEVEL MEETING PROCESS : CEOs OF EUROPEAN FREIGHT COMPANIES JOIN FORCES

**In spring 2006, the Chief Executive Officers (CEOs) of the CER rail freight companies decided to meet two or three times per year to discuss with representatives of the EU institutions issues that are of common interest.**



Jan Sundling,  
TAF TSI Steering Board chairman

Since then, these high-level meetings, organised by CER and UIC, have been bringing together the top people in rail freight. The meetings are chaired by Ferdinand Schmidt, CEO of Rail Cargo Austria. Apart from exchanging best practices and discussing common problems, the purpose of these meetings is to give CEOs the opportunity to meet key actors in European transport policy and to give their input from the market’s perspective. Guests at the high-level meetings included Members of the European Parliament, and representatives of the European Commission and national ministries.

Issues that were discussed and will appear on the agenda at future meetings include technical as well as strategic issues, such as the introduction of the European Rail Traffic Management System (ERTMS) and the Telematic Applications for Freight – Technical Specification for Interoperability (TAF TSI), the development of freight corridors in Europe, and the future of Single Wagon Load.

At the last meeting, held on 21-22 February 2007 in Vienna, the CEOs decided to ask Jan Sundling, CEO of the Swedish freight operator Green Cargo, to take over the chair of the new TAF TSI Steering Board, and act as representative of the railways to the European Commission for the TAF TSI implementation phase.

The next high-level freight meeting will take place on 10-11 September 2007 in Brussels.

As this platform for a European exchange at the highest management level has proved to be very successful, CER is be organising similar meetings for CEOs of passenger and infrastructure companies. (For informations on the last meetings, see the list of CER Events in the annex.)



## THE THIRD RAILWAY PACKAGE ENTERS ITS FINAL STAGE



Fierce negotiations between the European Parliament, Member States and the European Commission are taking place in the wake of the Commission's initial proposal of a third package of rail related EU legislation of March 2004. This legislation deals with opening the market for passenger transport, passenger rights and certification of train crews on international services<sup>20</sup>.

Legislative progress was made during the second half of 2006. After the formal adoption of the Council's common positions in July 2006, the European Parliament and later the Council completed their second reading in early 2007. The final conciliation phase under the co-decision procedure started in May 2007. This means that an agreement has to be reached by November 2007 at the latest.



### Passenger liberalisation

On the Passenger Liberalisation Directive, the main development is the alignment of the Parliament and Council on the international scope of the Directive. For the second reading, the Transport Committee in the European Parliament maintained its commitment to extend the scope of the text to all passenger services — albeit with new timescales — but the European Parliament Plenary voted narrowly in favour of the Council's position, limiting the scope to international services with "cabotage"<sup>21</sup>. CER had consistently supported this approach, because of the very different circumstances in Member States. In Eastern Europe, for example, some railways would not be ready for competition due to the lack of proper contractual agreements for public service, their debt, or the state of their rolling stock. Differences between the European Parliament and the Council on the proposal for a levy on open access operators and future reporting requirements are expected to be resolved in conciliation.

If the conciliation phase is successful, the market will be open for international services by 1 January 2010.

20. The Third Railway Package was originally published in March 2004: it consisted of a Directive on the liberalisation of international rail passenger transport; a Regulation on the rights and obligations of international rail passengers; a Directive on the certification of train crews; and a Regulation on freight quality. Last year, we reported on the European Parliament first reading in September 2005 and the Council political agreement in December 2005, which together resulted in the rejection of the Commission's freight quality proposal.

21. "Cabotage" is the right to convey national passengers on international trains serving more than one station in the Member State concerned.



## Passenger rights

In its second reading, the Parliament maintained its determination to extend the scope of the Regulation on passenger rights to national services. This is clearly the most significant issue for the Council. But, in addition to this, CER has more practical concerns regarding specific provisions for passengers with reduced mobility (PRM) (especially, station and train upgrading, and assistance at un-staffed stations); liabilities for delays beyond the railways' control; and the provision of designated areas in all trains for bicycles, baby carriages, PRM and sports equipment. This last proposal (which was developed from the "bicycles only" obligation supported in the first reading in 2005) was greatly supported by the European Parliament, but it seems inconsistent with EU policy on better regulation. It was not part of the Commission's original proposal; it had not been subjected to an impact assessment; and lacks proper justification based on customer demand.

Apart from these points, the Parliament did ensure that improvements to the original proposal were made. The proposed Regulation now ensures reasonable commercial flexibility for railway companies regarding ticket sales and information. While there are still other detailed, but important, legal points that have to be resolved, the Regulation as a whole is significantly different from the 2004 proposal.

But the most important question remains: Will the Council accept its extension to national services? Indications from recent Council discussions are that a large majority of Member States is against this. The conciliation process will clearly not be easy. CER believes that a compromise could and should be reached, by limiting the scope extension to specific train service types and specific chapters in the Regulation. However, this must be accompanied by solutions to those concerns voiced by CER.

## Train crew certification

The Parliament Plenary in January 2007 supported a number of useful amendments to the Council's common position such as the reimbursement of training costs when drivers change companies and the need for continuous training.

However, the Parliament supported the Commission's proposal to include train drivers and other on-board staff with safety related tasks within the scope, which will be the main point during the conciliation phase.



In September 2006, CER published its *Position Paper on the European Commission Report on the Implementation of the First Railway Package*. This position paper comments on the most significant elements in the report, such as infrastructure charging, organisational separation, the practice of cross-subsidy and the Cohesion Policy.

## RAIL TRANSPORT AT THE CROSSROADS: PUBLIC SERVICE TRANSPORT IN CENTRAL AND EASTERN EUROPE

**For the railways, public service transport represents a substantial part of their revenues. Approximately 90% of domestic passenger transport services are currently provided in the EU under public service obligations. These services are the backbone of regional or even national passenger transport infrastructure in the Member States. For public authorities, public transport constitutes an important tool in their welfare policies. In that context, any legislation regulating the conditions for public service transport should establish the necessary legal and financial security to operators on the market.**

### Current legal context

The EU first established rules for public service transport in 1969 (Regulation 1191/69). The Regulation aimed, amongst others, at protecting railway activities from the powers of their shareholder: the State. The fundamental objectives of the 1969 text were that railways should provide public transport under precise conditions and that such services were to be compensated. It proved to be efficient. Today most railway companies in the EU-15 provide public service transport under normal market conditions. In Central and Eastern European countries the situation is different. Having joined the EU recently, they have not yet been able to reap the rewards of the 1969 legislation.

As the CER annual report is drafted, the European Parliament is in the process of completing its second reading. The 1969 text is now under review within the European institutions. The focus of the draft text of this revision is to simplify the conditions under which public service transport is provided and to secure that operators are not over-compensated. In this regard, there are two realities in the EU. On the one hand, most of the railway companies in the EU-15 countries provide public service transport within the context of a contract, and are sufficiently paid for these services. On the other hand, railways in the new EU Member States are struggling with the public service obligations, as they often do not even have a proper contract with the public authorities for these services and they are not paid the effective cost of the services they provide.



In March 2007, CER published its position paper on *Rail transport in South East Europe: It all depends on regional cooperation*. This position paper presents five challenges and five good reasons for strong regional cooperation the establishment of which requires a special effort from the involved authorities, the European Commission and the international community.

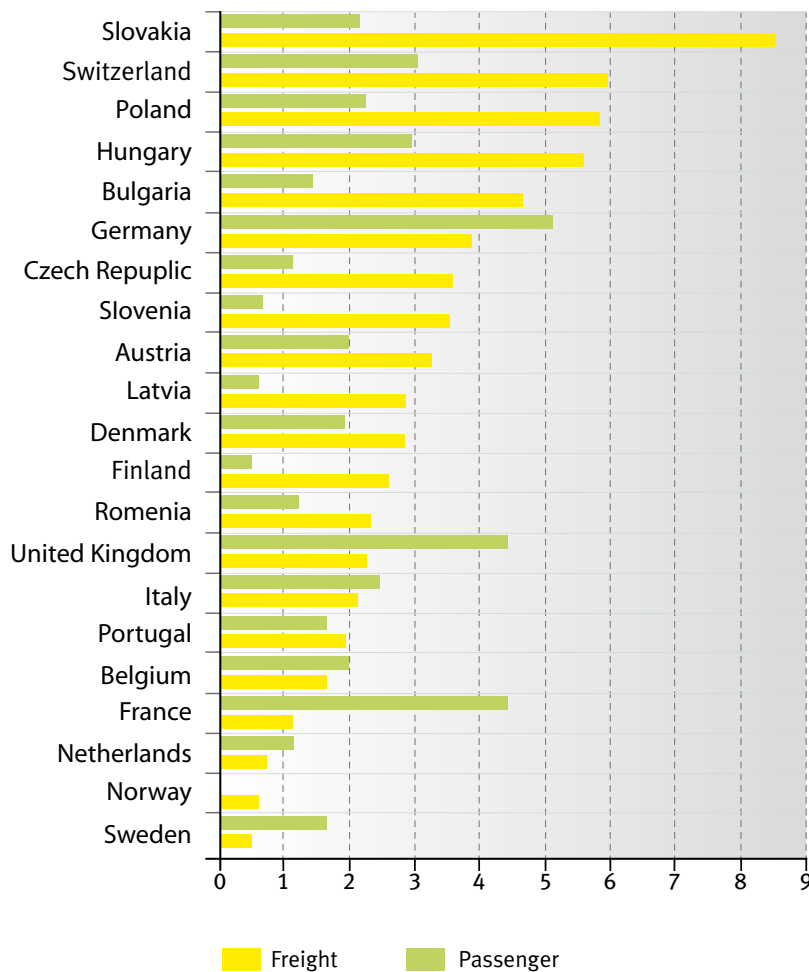
### Difficulties for passenger public transport in Central and Eastern Europe

Public passenger transport service by rail has been historically under-funded in Central and Eastern European countries. This problem dates back to the Socialist system, when tariffs were kept artificially low, while at the same time, rail transport was — and still is — the victim of budgetary constraints. Today, due to a lack of appropriate compensation of their public service transport, railway companies accumulate debts that have to be absorbed by other means (see figure 4).

State ownership and the non-implementation of the EU legislation, which requires effective management responsibilities from the railway companies, aggravate the problem: railway companies are not free to make the economic and financial choices any commercial company would be able to make when facing the new open market.

All of this affects the quality of services: as railway companies in Central and Eastern Europe are financially asphyxiated but still required to provide services over an excessively expanded network, they are not in a position to offer services tailored to meet market demand.

Figure 2: Average access charges (€/train-km)



Source: European Conference of Ministers of Transport, Committee of deputies, Charges for the use of infrastructure in ECMT railways, January 2005



### Creating a vicious circle

Instead of paying for the services they require, public authorities cover the losses — made in the public service passenger business sector — by using revenues from other activities. In many cases, cross-subsidisation is made possible by using revenues generated by the successful rail freight business. Due to a lack of capital to invest in new rolling stock or other quality improvement measures, subsidising passenger transport has a negative impact on the quality and the attractiveness of rail freight. This is a great concern for railway companies in Central and Eastern European countries as the freight market was just opened to full competition. The risk exists that they will rapidly lose their market share to new entrants to the freight sector, which do not have to carry the same financial burden.

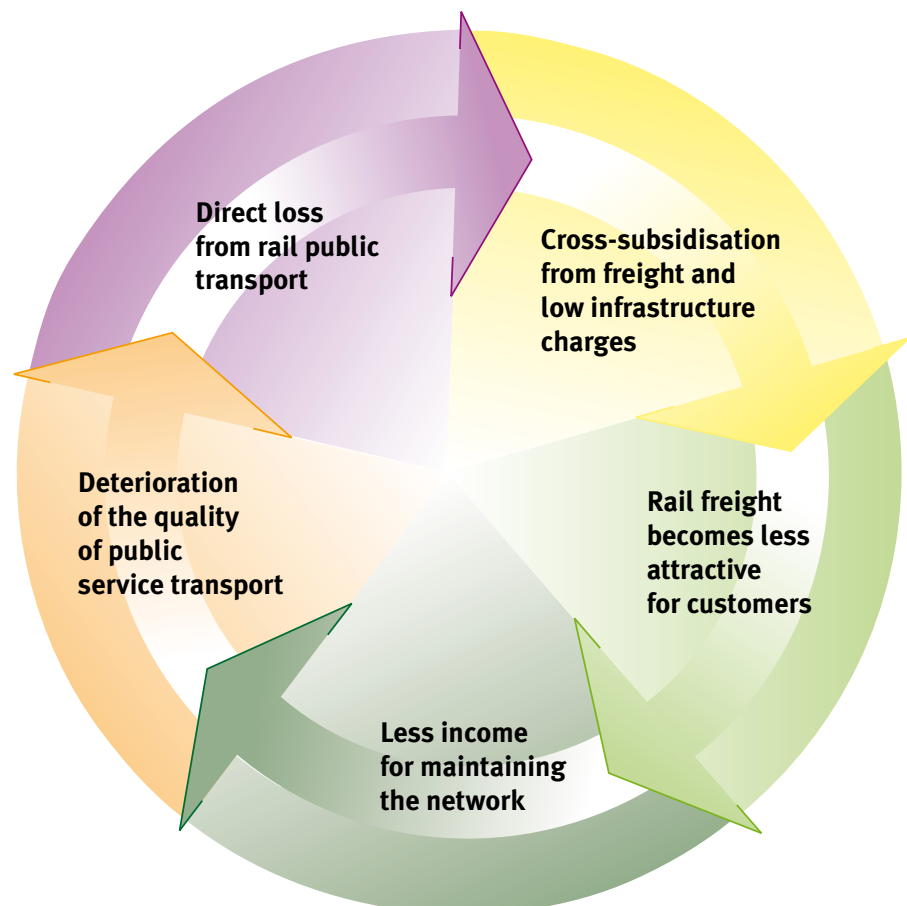
In public passenger transport, deteriorating quality will benefit the road sector as passengers will progressively shift to car and public bus transport for which infrastructure is heavily subsidised. Paradoxically, this could happen, just as the European Commission is promoting a modal shift towards more environmentally friendly transport modes.

Cross-subsidisation also occurs through artificially low infrastructure charges for public passenger services, which then results in less income for maintaining an overly expanded network. Moreover, the losses made in infrastructure are often passed on to rail freight for which access charges in many Central and Eastern European countries are artificially high (see figure 2).

Eventually, the accumulation of all these elements leads to the deterioration of the quality of public service transport as a whole.



Figure 3: The vicious circle of under-compensation



RAIL TRANSPORT AT THE CROSSROADS : PUBLIC SERVICE  
TRANSPORT IN CENTRAL AND EASTERN EUROPE

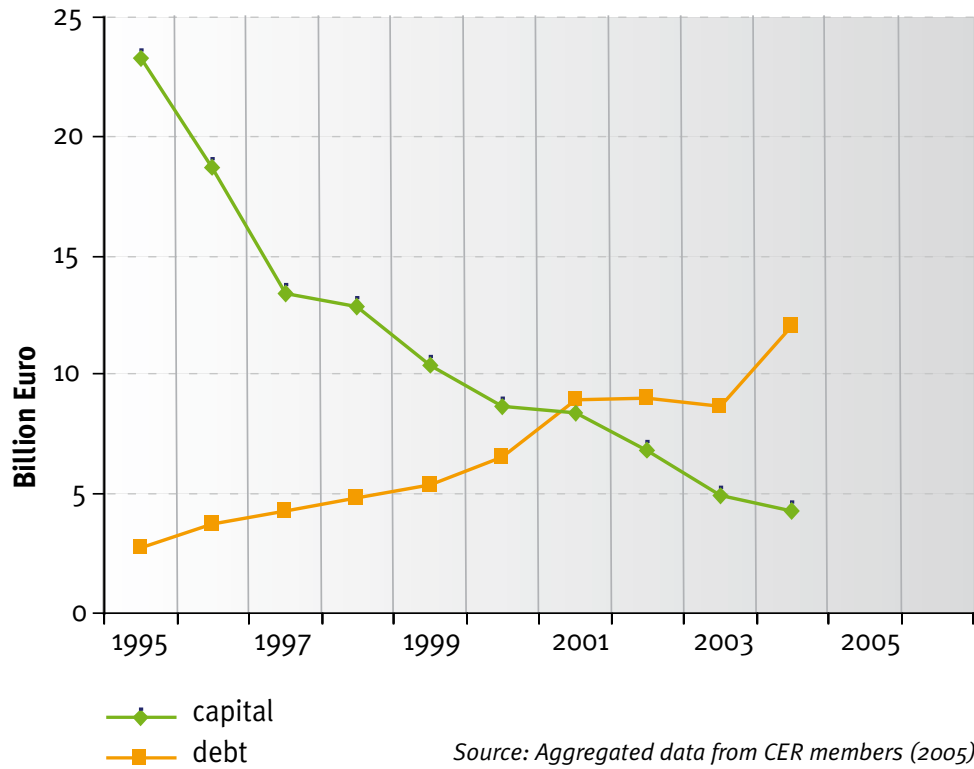


Losses from passenger operations quickly erode the capital of the rail companies as their structural deficits increase and their equity capital declines, as can be seen on the chart below. This financial instability will ultimately lead to a reduced market share for rail transport.

The total capital of the rail sector in CEECs has shrunk from €28 billion in 1995 to about €4 billion today, and could be below €1 billion by 2010!

Meanwhile, the debt of the CEEC rail sector has increased from €2.7 billion (in 1995) to €12 billion (in 2004).

Figure 4: Capital and debt of railways in CEECs



Source: Aggregated data from CER members (2005)

### The challenge

Overcoming the difficulties in the public passenger market will not be an easy task as many elements have to be dealt with at the same time.

First, public authorities must determine the service and pricing levels in a clear manner. These policy decisions should **be coordinated between the different transport modes** in order to offer passengers the most appropriate and financially efficient transport service.

Second, the **signing of proper public service contracts** aimed at improving passenger services will not only offer the necessary legal and financial security to the chosen operator, but also serve as a good basis to apply for EU funding (European Structural Funds) to purchase new rolling stock or refurbish existing stock. This is a critical issue in Central and Eastern European where the average age of rolling stock is more than 25 years, in other words, almost at the end of their lifecycle.

Third, when infrastructure companies sign **multi-annual contracts** with the State on infrastructure financing, they should be able to plan infrastructure maintenance and improvement better ahead.

The coordination of these measures can only enhance quality of service. Eventually, the vicious circle described could be transformed into a “positive circle” leading to better services and therefore an enhanced modal shift: the original objective in the European Commission’s White Paper of 2001.

### Conclusion

It should also be stressed that the difficulties that are so blatant in Central and Eastern Europe can also be found in other parts of the EU. Aside from some cases which exist today, increasing budgetary constraints in the EU Member States create the risk that public authorities start under-compensating their national carriers. It is therefore crucial not only to help the rail sector in Central and Eastern European countries face their challenge but also to secure that other EU-15 countries do not end up in the same situation.



## EUROPE'S RAILWAYS AND THE CITIES: CER'S POSITION ON THE GREEN PAPER ON URBAN TRANSPORT

**The European Commission announced its intention to publish a Green Paper on urban transport in autumn 2007. This is an interesting step forward from the Commission's 2001 White Paper, in which the scope for EU action was seen to be quite limited. It is now clear that urban transport – with its economic, environmental and energy effects – has a major impact on transport policy as a whole. A Green Paper offers the chance to address the environmental, social and economic impacts of urban transport by way of an integrated approach.**



CER believes that the scope of the Green Paper should include transport into and around cities, within an area greater than urban city centres. In many cases, traffic congestion is more acute on the transport arteries into the centre.

Any EU initiative should concentrate on creating framework conditions that would ensure that urban rail and other public transport systems can cope with greater use of these systems in future, whilst respecting subsidiarity. In many cities, the rail system is already operating at or beyond capacity: ways have to be found to support the development of extra capacity, either on existing or new routes.



The EU should focus on creating demand for those modes of transport with the most favourable social, economic and environmental impacts. This does not necessarily mean that new urban-specific legislation or measures are needed. Indeed, CER already argues that the overall EU transport policy needs to be re-considered in a way that incorporates environment and energy policies. CER's current focus in this regard is on the unfinished business of the Eurovignette Directive for road freight tolls. However, the principle should apply to all transport at all levels (from urban to international), if Europe is serious about tackling the environmental and economic challenges of transport policy.

Rail freight should be included in the scope, linked to other Commission policy proposals. Progress with the European Commission's work on a primary rail freight network for Europe can also contribute to reducing urban transport problems and negative environmental impacts in the long run; specific city centre bottlenecks have to be addressed: rail freight passing through city centres limits capacity, in particular at peak periods.

CER believes that quality and procedural standards are best mandated in accordance with the subsidiarity principle, by the local authorities, rather than by the EU. Local authorities are best placed to take into account the specific characteristics and needs of local transport demands and, on this basis, can properly calibrate the measures needed to influence the customer's choice.

The EU could play a role in promoting research and the exchange of good practice in urban transport. There are many good examples of effective intermodality in urban transport systems: physical system interchange, lowering cost by standardisation of the technical systems, ticket availability between transport modes, etc. Exchange of good practice should also include individual examples where the best use is made of rail along with other transport modes.

## EUROPE'S RAILWAYS AND THE CITIES: CER'S POSITION ON THE GREEN PAPER ON URBAN TRANSPORT

CER can support the concept of EU funding for schemes aimed at improving urban transport, and for related studies that could have EU-wide benefits. However, funding initiatives should not be at the expense of EU funding for key international projects aimed at improving rail interoperability or for rail modernisation, in particular in Central and Eastern Europe. Experience with the EU TEN's budget for the period 2007 – 2013 suggests that the room for manoeuvre in this respect may be very limited.

Overall, the attractiveness and effectiveness of urban public transport systems is best addressed by the EU at a more fundamental level: does the price paid by the user for any mode of transport fully reflect the cost to urban society? Does the responsible public authority sign public service contracts for urban transport that allow suitable and sufficient service to be provided for their needs? And, as argued above, can system capacity limitations be resolved?



## HELPING TECHNICAL STANDARDS BECOME EUROPEAN : CER'S INTEROPERABILITY ACTIVITIES

**The European Commission mandated the European Railway Agency (ERA) to develop technical standards for harmonised cross-border railway operation across Europe. However, ERA could not fulfil its mission without the technical expertise of railway experts from all over Europe. CER brings experts from companies and agents from ERA together. However, CER's interoperability activities go beyond the work with ERA. This article gives a short overview of the diversity of CER engagement, making border crossing easier in future.**

In the course of 2006, ERA made significant progress in the development of Technical Specifications for Interoperability (TSI) for the following sub-systems:

- Traction Units and Locomotives
- Passenger Carriages
- Infrastructure and Energy.

In early 2007 the last mandated TSI working party launched its activity: developing European specifications on Telematic Applications for Passengers (TAP TSI).

The interoperability related activities include work on TSIs, preparing documents intended for the European certification of maintenance workshops, and the registration of rolling stock. The most important field of action regarding interoperability — the European Rail Traffic Management System (ERTMS) — is dealt with by a separate ERA unit; it is mainly steering the process of ERTMS specification change control management.

All these activities are broadly based on cooperation with representative bodies from the railway sector, in other words, associations that are authorised by the ERA to present and contribute on behalf of the sector. Among them CER plays a very important role, since it represents most European railway and rail infrastructure companies.

CER has nominated selected senior experts as speakers to the ERA working groups and let them present the members' opinion. CER also put together corresponding support groups. The whole structure of CER activities in relation to ERA is controlled by the CER ERA steering unit that comprises CER member representatives.



*In the beginning of 2006 the management of interoperability activities was completely taken over by the European Railway Agency (ERA), whilst the Association of European Railway Interoperability (AEIF) enjoyed its very last, 67th Board of Management meeting on 30 May 2006.*

## Cooperation with ERA and cross-sector coordination

ERA organised a meeting with representative bodies of the railway sector at its Lille office in September 2006, with the objective of summarising and evaluating the progress made during the Agency's first year of activity. At the same time, ERA presented its strategy paper outlining the main principles of its future activities. CER responded to the strategy by suggesting that ERA focuses on priority issues and that it would require broader mandates to complete the existing TSIs.

Following the closure of the European Association of Railway Interoperability (AEIF), organisations in the sector agreed to engage in cooperation of the railway representative bodies, as and when needed. Three levels of informal cross-sector coordination were informally set up:

- Level 1: Coordination group of associations (high-level management), responsible e.g. for strategy formulation, future needs, visions, research activities needed.
- Level 2: Technical management (operational level; composed of senior experts of CER, EIM, UNIFE, and UITP). This level has already been preparing the basic structure of future activities.
- Level 3: Cross-sector speakers' groups that meet on demand.

Level 2 held several meetings in 2006 and early 2007, which were attended by representatives of CER, EIM, UNIFE and UITP to identify critical issues and propose adequate solutions for ERA issues.



## Liaison with standardisation bodies

As one of the most important railway representative bodies, CER was invited to participate in CEN/CENELEC/ETSI Joint Programming Committee Rail (JPCR). The mission of this Committee is to coordinate the activities of the European standardisation bodies CEN (European Committee for Standardisation) CENELEC (European Committee for Electrotechnical Standardisation) and ETSI (European Telecommunications Standards Institute) related to the rail system. Moreover, the Committee provides a good working interface between these bodies and ERA in the process of the TSI development.

In addition, an agreement between CENELEC and CER is being prepared. This agreement will invite CER to:

- give advice on current and future standards programmes by stating needs and proposing priorities;
- propose drafts to the CENELEC Technical Board with a view to their possible incorporation into the body of CENELEC standards via the normal approval procedures;
- deliver expert advice where necessary on implementation dates and legislative consequences of the adopted European standards.

### CER Control-Command and Signalling brochure: contribution to interoperability

Developing a new signalling system for Europe's trains is probably the most important step in the development of interoperability. Railway companies, manufacturers and political institutions have been cooperating for some years on this important initiative.

Using new technology will reduce infrastructure costs and offer benefits in rail system competitiveness against other modes of transport. Savings as a result of this new technology will make it possible to offer freight and passenger customers a better price. It will enable railway companies to improve the competitiveness of their product, which is the main aim for all future work. This forms the basis for European transport policy objectives and legislation.

While development work on ERTMS must continue, its potential will be fully realised only if a new command, control and signalling system (CCS) — of which ERTMS is just one part — is implemented as a whole.

In March 2007, CER published a comprehensive overview of the current status and challenges of ERTMS. This brochure *A new signalling system for Europe's trains* can be ordered at CER or downloaded from the CER website.



### ERTMS deployment controlled by the European Coordinator

Karel Vinck chairs the Steering Committee, responsible for the follow-up of the Memorandum of Understanding between the European Commission and the European railway associations (CER, UIC, UNIFE and EIM), which determines the basic principles for the definition of an EU deployment strategy for ERTMS.

The Steering Committee plays a central role in the coordination of all ERTMS related activities with a special focus on the ERTMS implementation on six selected freight European corridors, using TEN-T financial incentives.

In early 2007, DG TREN presented an updated plan for the first call of TEN-T financing 2007-2013, including the financial provisions for ERTMS implementation. The first call for proposals is scheduled to go out in mid-April 2007; the submission deadline will be mid-July 2007.





## HELPING TECHNICAL STANDARDS BECOME EUROPEAN : CER'S INTEROPERABILITY ACTIVITIES



### Rolling stock cross-acceptance: major contribution to railway business

Facilitating the use of rolling stock for international services is a major concern for CER. At the end of 2006, the European Commission released a Communication to the Council and European Parliament with the aim to simplify the placing-into-service of locomotives and multiple units in other EU Member States by means of an obligatory “cross-acceptance” procedure for all EU countries in future. For this purpose, the Commission proposed amendments to safety and interoperability legislation which are generally in line with recommendations made by the railways themselves in 2005 and 2006. The amended legislation should bring more transparency to the approval process.

The changes will help to increase rail market share for both passengers and freight transport. This issue must therefore be a priority for the legislative programme in 2007.

## SOCIAL AFFAIRS IN THE RAIL SECTOR : WORK PROGRESS AND 2007 CHALLENGES

**The re-organisation of railway undertakings during the past decade was only possible with the continuous involvement of the social partners. Therefore, CER, as a recognised social partner in the railway sector, actively supports the social dialogue in the sector.**

### Working conditions on international services



One important area of social dialogue is minimum working conditions for staff in cross-border services. The creation of an integrated and competitive railway area in Europe calls for effective interoperability rules and common technical standards. These common standards must also include minimum working conditions in order to overcome differences that might otherwise prevent or impede exchanges.

In this context, CER and the European Transport Worker's Federation (ETF) worked out two agreements, signed in January 2004: the first one was related to the European Driving Licence for locomotive drivers in international services and dealt with the mutual recognition of health and competence requirements of drivers working on infrastructures abroad. It was the basis of the draft Directive on certification of train crews proposed by the European Commission in the framework of the Third Railway Package in 2004.

The second agreement is related to the working conditions of mobile staff in cross-border services. Last year, CER and ETF began negotiations on the revision of clause 4 in this agreement, related to the rests away from home. In international services, a daily rest away from home has to be followed by a daily rest at home. There is a possibility of having a second rest away from home through agreements between social partners at national or company level. CER is asking for more flexibility in this maximum number which could be used for developing new business across the border, exploring the potential of the newly created common EU rail freight market.



On these joint seminars, CER published together with ETF the publication *The Social Dialogue in the Rail Sector: Towards a Strong Partnership in an enlarged Europe*, a presentation of the European Social Dialogue particularly focusing in the railway sector of new Member States and accession countries.



## Promoting European Social Dialogue

Apart from the re-negotiation process of the agreement on working conditions, CER is engaged in several studies or projects with other European Social Partners<sup>22</sup>. In this context, CER and ETF organised two joint seminars on social dialogue at national and European level for the new Member States in Tallinn (for Estonia, Latvia and Lithuania) and in Bucharest (for Bulgaria and Romania) in June 2006. A brochure was also published on these seminars<sup>23</sup>.

These information seminars are good examples of a common response to new circumstances. They gathered participants from across the enlarged EU and the accession countries and aimed at improving the social partners' knowledge of their counterparts, holding an exchange of views on the work of the European social dialogue in the sector and identifying the social partners' needs after enlargement. This capacity-building action helped to develop trust and mutual understanding and has already led to an increased participation of the new Member States in the European social dialogue.

In the context of the opening to competition of international and domestic rail freight services in January 2007 and the numerous and profound re-organisation of freight services in the European Railway undertakings, the Social Dialogue Committee for Railway integrated a study on the impact of this restructuring of freight services on employment into its work programme. The study aims at analysing the qualitative and quantitative impact on the personnel of the restructuring of freight services from a short, medium and long-term perspective. The study will list best practices and, as far as possible, common CER-ETF recommendations.

These activities are organised with the support of the Directorate General for Employment, Social Affairs and Equal Opportunities of the European Commission.

## Promoting women

Based on a joint study by the social partners<sup>24</sup> to identify the representation of women in railway companies and various railway occupations, their situation as well as examples of good practice for a better integration of women in the railway sector, CER and ETF prepared joint recommendations to support equal opportunities for women in the railway sector.

The European railway sector employs 1.2 million staff in various professional areas. In Eastern European countries the percentage of female workers is on average 30%. In Western European countries, on the other hand, the percentage in some cases is below 10%.

The social partners want to contribute to integrating women better in a traditionally male-dominated sector. Therefore, they have established recommendations with the aim to put them into practice at national, regional and corporate levels.

The joint recommendations to support equal opportunities for women in the railway sector<sup>24</sup> will be signed by CER and ETF during an official meeting in Rome in June 2007. The event falls in the middle of 2007, designated as the "European Year of Equal Opportunities for All – Towards a Just Society".

22. ETF and EIM.

23. Published in April 2005, the study *Representation and Better Integration of Women in the Different Professions of the Railway Sector* can be downloaded from the CER website [www.cer.be](http://www.cer.be).

24. See the joint recommendations on the CER website [www.cer.be](http://www.cer.be).

### Crossing language borders

Language is the key to interoperability of staff and the question of language used in railway operations is a complex problem. Drivers and other railway staff – mobile or ground – staff who have to communicate for train movement and other safety purposes must do so in the “operating” language chosen by the host infrastructure manager.

For this reason, CER launched a project to facilitate staff interoperability and create a common basis for teaching languages last year. The two first parts of the project have been finalised.

The first part deals with finding a precise definition of the minimum language competence needed by staff involved in cross-border rail operation. The second part is to find an assessment method of this language level that can be used by any rail operating company and can be accepted by infrastructure managers and national safety authorities across Europe.

These results have to be submitted now to the European Railway Agency to find the best way for making them applicable in the whole European railway system.

The third part of the project is related to the creation of a formalised language, with the definition of key messages and language elements of identical content to be used in communication between drivers and ground staff in charge of traffic management for each “risk situation” in the language of the infrastructure used. The first list of formalised messages will be produced by end 2007.



## CER ENLARGEMENT 2006/2007

While the EU grew by two new members in January 2007, CER welcomed a total of 11 new companies to its community, increasing CER membership to 63. The growing number of railway operators and infrastructure companies joining CER is a result of the market liberalisation, railway reforms in the Member States and the enlargement of the EU. It confirms CER's position as the main representative body of the European railway sector. The new CER members come from a variety of backgrounds and reflect the strong development of private freight and passenger operators in the rail transport market across Europe.

**Baltijas Ekspressis (BE)** is the first private freight railway company registered in Latvia. During the first years of operation, the company generated significant traffic flows and features very strongly in the transport to and from Latvian ports, mainly Ventspils.

Like BE, the **Bulgarian Railway company (BRC)** too is the first national private freight operator, but in a different geographic context. BRC received its license in 2005 in Bulgaria and its Europe-wide license in 2007. The company's management has vast international and operational rail experience and is set to give the company a prominent and stable position on the market.

**CTL Logistics Group**, the biggest private Polish freight company, grew from a successful rail forwarding group. They are one of the largest new entrants on the European rail freight market with already established operations in Poland and neighbouring countries with around 40 million tons of transported cargo in 2005. CTL Logistics specialises in the transport of chemicals, which account for 42% of its cargo.

After 13 years of operation, the British rail operator **Eurostar/UK** is a well-established railway company. It too operates across national borders, between mainland Europe through the channel tunnel to London, but transports people rather than goods: 7.8 million travellers in 2006. In 2007 the opening of the second section of the new UK high-speed rail line will reduce travel times even further e.g. London to Brussels in under two hours.

With **Grup Feroviar Roman (GFR)** another newly established freight operator has joined CER. GFR is a private joint-stock company in Romania and focuses on freight operations and shunting services for freight wagons. Their offer includes services of freight dispatches, wagon rentals for freight transportations, overhauling activities, repairs and maintenance of the rolling stock and infrastructure as well as consultancy on logistics issues. Their large fleet is one of the most modern in South-East Europe.

**Hekurudha Shqiptare (HSH)** is the integrated railways of Albania. This company manages rail infrastructure and operations for rail freight and passenger services throughout Albania. HSH was welcomed into the Community of European Railway and Infrastructure Companies in the spirit of Albania's aspirations for alignment with the European Union and also in the spirit of context of CER's cooperation with the European Commission and the World Bank in South-Eastern Europe.

Increasingly, new railway operators organise themselves in national associations. Like the British Association of Train Operating Companies (ATOC) and the Association of Swedish Train Operating Companies (ASTOC), the **Hungarian Railway Association (HRA)** also joined CER. HRA was established in 2006 and currently represents eight companies, amongst them MAV Cargo, GYSEV and Central European Railways (CER), companies which are also independently CER members. The Association was founded as an instrument for common representation, but will also guarantee the unified introduction of EU Directives and Regulations on interoperability in Hungary.

One of HRA's members is **MÁV Cargo**, the biggest Hungarian rail freight operator. The company was restructured into a separate legal entity in 2006 under ownership of MÁV and is now preparing for privatisation. After separation from MÁV, MÁV Cargo decided to apply for independent membership of CER.

**Servtrans-Invest** is a private freight railway company that first registered in Romania in 2005. Like BRC in neighbouring Bulgaria and CTL in Poland, Servtrans — with its extensive expertise of rail freight — is striving to develop international relations, after having established its position as one of the largest new entrant companies on the Romanian market.

**TCDD** is the Turkish State Railways, an integrated railway operating and infrastructure company. It joined CER, encouraged by the opening of negotiations between Turkey and the EU. TCDD has embarked on a vast investment programme which will prepare the country's transport system by 2015 for entry into the EU. This includes the construction of a tunnel beneath the Bosphorus (expected to open after 2009 due to spectacular archaeological finds) and the restructuring of the rail sector in conformity with the EU legal framework.

To illustrate the diversity of CER's members even further, the **Wiener Lokalbahnen (WLB)** is an Austrian railway company with an interesting background. It is a privately operated subsidiary of Vienna Corporation. Despite its relatively small size, it is an integrated railway offering local passenger and freight services using its own infrastructure as well as other lines. Its main focus for the years to come will be on its expansion as an international freight operator.

Membership of CER is motivated first and foremost by the active involvement in shaping EU rules and legislation. The fair and balanced representation of its diverse membership base is certainly a challenge for CER, but definitely constitutes the core of all CER activity. The consensus members achieve through their participation in CER — irrespective of size, ownership, or specialisation — results in positions that are representative of the entire sector and are therefore valuable contributions to the EU decision-making process.





Albania		Hekurudha Shqiptare	Albanian Railways
Austria		Wiener Lokalbahnen	Vienna Regional Railway
Bulgaria		Bulgarian Railway Company	Bulgarian Railway Company
Poland		CTL Logistics	CTL Logistics
Hungary		Magyar Államvasutak Cargo	Hungarian Rail Freight Company
Hungary		Magyar Vasúti Fuvarozói Egyesülés	Hungarian Railway Association
Latvia		Baltijas Ekspresis	Baltic Rail Freight Company
Romania		Servtrans Invest	Servtrans Invest
Romania		Grup Feroviar Roman	Romanian Railway Group
Turkey		Türkiye Cumhuriyeti Devlet Demiryolları	Turkish State Railways
United Kingdom		Eurostar (UK)	Eurostar (UK)

POLITICAL EVENTS

2006

3 May	The European Commission reports on the implementation of the European Directives of the 1st railway package in EU Member States, three years after the deadline for transposition. The report concludes that legal implementation is “well under way”. It also provides an overview of developments in the rail market and refers in particular to the stabilisation of rail market shares and the reverse of the downwards trend in some Member States. However, the Commission considers that efforts have to be enhanced in some countries to ensure an effective regulatory framework and the satisfactory functioning of the rail services market.
17 May	Official publication of the revised Eurovignette Directive setting a maximum level for road tolls in the European Union.
8-9 June	EU Transport Council: EU Transport Ministers reach a political agreement on the revision of the Regulation on public service obligations.
9 June	The European Council adopts a renewed EU sustainable development strategy, setting precise targets, such as limiting temperature increases to 2°C, saving 20% energy by 2020 in the EU, or reducing greenhouse gas emissions.
9 June	Transport Ministers from France, Belgium, Luxembourg and Switzerland, meeting in the presence of Commission Vice-President Jacques Barrot, sign a letter of intent concerning the setting-up of an interoperable rail freight corridor between Antwerp, Basel and Lyon implementing the European rail signalling system ERTMS.
9 June	Transport Ministers from Germany, Austria, Slovakia and France sign a declaration of intent for the speedy realisation of a high-speed railway axis running through Paris, Strasbourg, Stuttgart, Vienna and Bratislava.
15 June	The European Parliament plenary adopts the report drafted by Michael Cramer (Greens, Germany) on the deployment of the European rail signalling system ERTMS/ETCS.
22 June	The European Commission adopts the mid-term review of the 2001 White Paper on transport policy: “Keep Europe moving: a transport policy for sustainable mobility”. It stresses the importance of mobility and gives up the objective to limit transport growth. It also introduces the concept of co-modality, while keeping a reference to the need to achieve modal shift to environmentally friendly modes “where appropriate”.
28 June	The European Commission adopts a Communication on freight transport logistics, to be complemented by an action plan in autumn 2007.
28 June	The European Commission sends a reasoned opinion to four Member States for failing to notify any transposition measures for the Directive of the Second Railway Package which opens the market for international and national rail freight services.
30 June	Deadline for Member States to submit their National Allocation Plans (NAP) setting precise targets for the reduction of greenhouse gas emissions.
1 July	Finland takes over the Presidency of the Council of the European Union.



## POLITICAL EVENTS

### 2006

18 July	The European Commission adopts a proposal to modernise the Single Market legislation for aviation and ensure its consistent application in all Member States. It also imposes transparency in fares announced to passengers.
13 September	The European Commission adopts a Communication setting out the Main results of the activities of the coordinators for the trans-European transport network (TEN-T), including recommendations about the effective implementation of these priority projects.
12 October	The European Commission decides to pursue infringement proceedings against 13 EU Member States that have failed to notify the transposition of two Directives of the Second Railway Package into domestic legislation.
12 October	EU Transport Council: Ministers discuss the mid-term review of the European Commission's Transport White Paper.
19 October	The European Commission adopts its action plan on energy efficiency "Saving 20% by 2020" with 75 priority measures covering a wide range of cost-effective energy efficiency initiatives.
23 October	EU Environment Council: Ministers adopt conclusions on climate change.
24 October	The European Parliament and the Council adopt the Regulation establishing the second "Marco Polo" programme for the granting of Community financial assistance to improve the environmental performance of the freight transport system.
26 October	The European Commission adopts a decision establishing the Trans-European Transport Network Executive Agency (TEN-TEA). The Agency will manage the Community funds available for the promotion of the trans-European transport network.
27 October	The European Environment Agency publishes a report on greenhouse gas emission trends and projections in Europe.
30 October	The Stern Review on the economics of climate change is released. This 700 page report by economist Sir Nicholas Stern for the British government discusses the effect of climate change and global warming on the world economy and highlights the dramatic costs of inaction.
14 November	The European Commission adopts its second report on the progress of railway interoperability across Europe. The report concludes that interoperability has improved and now covers both high speed and conventional rail networks.
22-23 November	EU Energy Council: Ministers adopt conclusions on the Commission's action plan on energy efficiency.
1 December	The second annual ministerial meeting for the development of the principal South-East Europe regional transport network takes place in Brussels with Commission Vice-President Jacques Barrot and the Transport Ministers from Albania, Bosnia-Herzegovina, Croatia, the Former Yugoslav Republic of Macedonia, Montenegro, Serbia and Kosovo (UNMIK). The meeting aims to promote regional cooperation in developing the South-East European transport networks.

## 2006

4 December	Vice-President Barrot meets railway sector stakeholders at the Commission Colloquium “Mobility in the European Union: what place for rail?”.
8 December	The Commission adopts a Green Paper on satellite navigation applications to find new ways to benefit from the Galileo system.
11-12 December	EU Transport Council: Ministers agree on conclusions about freight transport logistics and formally adopt a common position on the Regulation for the Public Service Obligations.
12 December	The European Commission decides to pursue infringement proceedings against three Member States that have failed to notify the Commission of the transposition of two key Directives of the Second Railway Package.
12 December	The European Parliament plenary adopts its opinion on the Commission’s proposal for a modernised customs code, based on the report by Janelly Fourtou MEP (ALDE, France).
13 December	The European Commission proposes a series of measures to remove obstacles to the circulation of trains throughout the European rail network. The measures include a Communication on the simplification of certification of railway vehicles, a proposal to recast the existing Interoperability Directives and to modify the Regulation establishing ERA and the Railway Safety Directive.
14 December	The European Commission launches an exercise to identify and alleviate obstacles to the smooth running of the freight transport chain in Europe. Interested parties are invited to submit details of bottlenecks they encounter and to identify effective solutions to these problems.
18 December	EU Environment Council: Ministers adopted conclusions on the EU objectives for the further development of the international climate regime beyond 2012.
20 December	The European Commission proposes legislation to bring air transport into the EU Emissions Trading Scheme (ETS) as part of its strategy to combat climate change.
22 December	European Commission proposes to harmonise the rules for the transport of dangerous goods by integrating the existing rules into one piece of EU law, which covers all three land transport modes: road, rail and inland waterways.

## 2007

1 January	Romania and Bulgaria join the European Union. Meglena Kuneva (Bulgaria) and Leonard Orban (Romania) are appointed Commissioners respectively for consumer protection and multilingualism, for the period from 1 January 2007 to 31 October 2009.
1 January	Slovenia adopts the euro, joining 12 European Union countries which already form the euro area.
1 January	The European rail freight market is completely opened to competition.
1 January	Germany takes over the Presidency of the EU Council of Ministers.

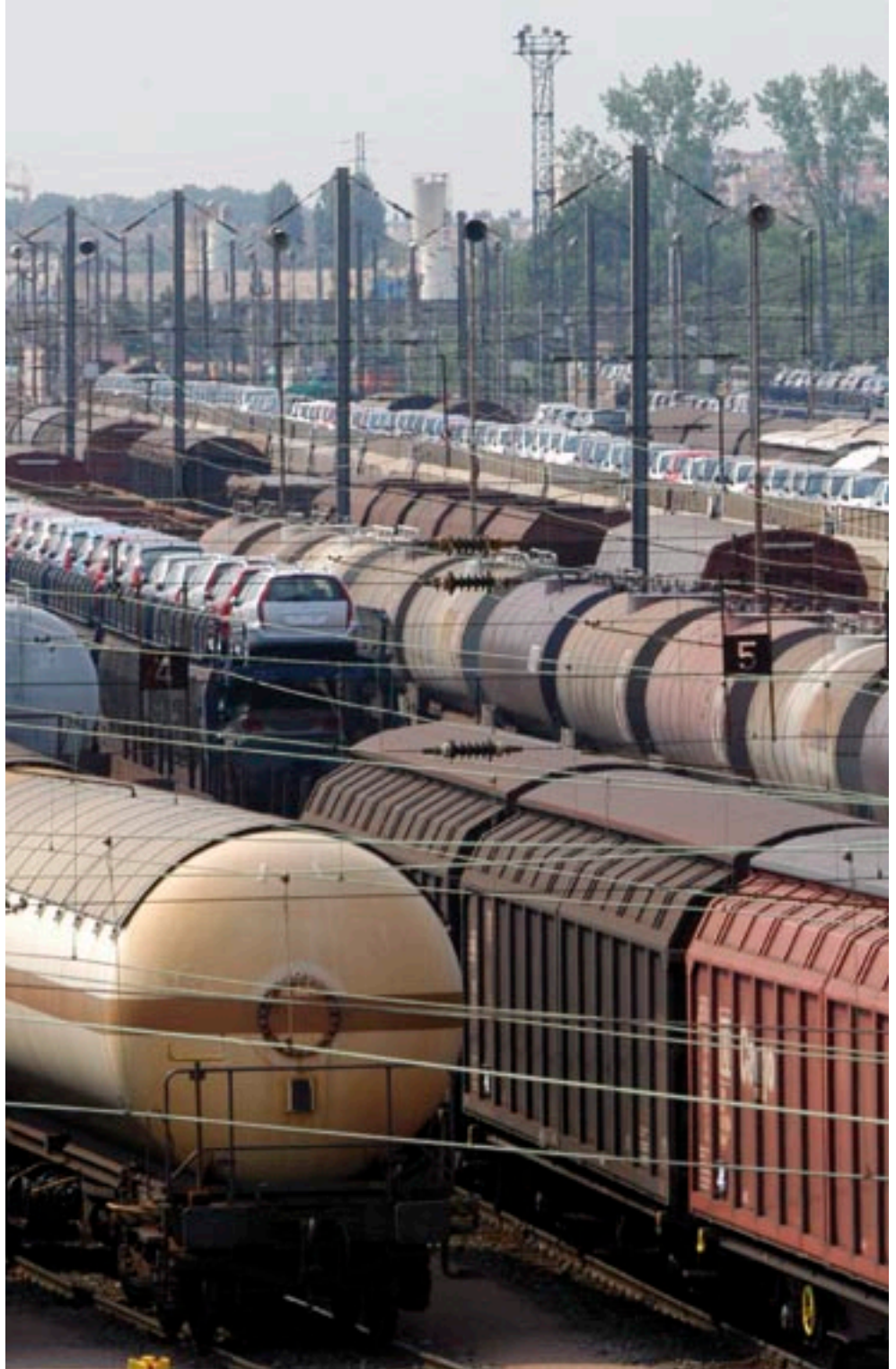
## 2007

10 January	The European Commission proposes an integrated energy and climate change package. It establishes that upcoming international negotiations on the post-Kyoto framework should lead to a 30% cut in greenhouse gas emissions from developed countries by 2020. The Commission also proposes that the EU should independently commit to at least 20% reduction of emissions by 2020.
16 January	The European Parliament plenary elects Hans-Gert Pöttering (EPP-ED, Germany) as its new President to replace Josep Borrell Fontelles (PSE, Spain) half-way through the Parliament's term.
18 January	The European Parliament plenary adopts its second reading opinion on the three elements of the Third Railway Package: a Directive on the certification of train crews, a Regulation on rail passengers' rights and a Directive on the liberalisation of rail passenger services. Contrary to expectations, the plenary rejects the liberalisation of domestic passenger services.
24 January	The European Commission adopts an Airport Package with three key initiatives: a Directive on airport charges, a Communication on airport capacity, efficiency and safety in Europe and a report on the implementation of the groundhandling Directive.
29 January	The European Commission launches its first Sustainable Energy Week.
31 January	The European Commission adopts Communication guidelines for transport in Europe and neighbouring regions. It identifies the five most important transport axes for international trade between the Union, the neighbouring countries and beyond and proposes measures to shorten journey times along these axes.
31 January	The European Commission launches its Green Paper on Urban Transport with a stakeholders' conference in Brussels. High level representatives from European cities and from the European institutions present the expectations of local authorities from the Green Paper and address the added value of actions at European level.
20 February	EU Environment Council: Ministers adopt conclusions on a future global climate agreement and discuss the inclusion of aviation in the EU Emissions Trading Scheme as well as the review of the EU strategy to reduce carbon dioxide (CO <sub>2</sub> ) emissions from cars.
26 February	The European Environment Agency publishes the TERM 2006 report "Transport and environment: on the way to a new common transport policy". The report criticises the environmental performance of the transport sector and questions the contribution of the mid-term review of the 2001 Transport White Paper in this respect.
5 March	A Eurobarometer opinion survey shows that the overwhelming majority of European Union citizens are concerned about climate change.
8-9 March	The European Council endorses the emissions reduction objectives set out by the European Commission in its package on energy and climate change of January 2007.

## 2007

15 March	In a workshop, the European Commission invites stakeholders to give their views on the first results of the study on the external costs of different transport modes in the revised Eurovignette Directive.
15 March	Jacques Barrot, European Commission Vice-President responsible for transport, inaugurates the TGV Est high-speed line in France.
19 March	The European Environment Agency publishes a report entitled “Size, structure and distribution of transport subsidies in Europe”, pointing out that transport subsidies affect the environment in different ways.
21 March	The European Commission decides to pursue infringement proceedings against ten Member States that have not yet communicated their national implementing measures to transpose two key Directives of the Second railway Package.
21 March	The European Commission adopts the Communication “Towards an integrated approach to trans-European transport, energy and telecommunications networks”, which looks at possible synergies between the networks and improved methods of financing them.
22 March	EU Transport Council: Ministers discuss sustainable transport policy and climate protection, the extension of the trans-European transport axes to the neighbouring countries and the Russian Federation’s tariff policy on international railway cargo transportation.
22 March	The Council adopts a common position on the Regulation laying down general rules for the granting of Community financial aid in the field of trans-European transport and energy networks.
25 March	50th Anniversary of the signing of the Treaty of Rome, creating the European Economic Community (EEC) providing for the free movement of people, goods and services across borders. EU Heads of State and Government, the Commission President and the European Parliament President sign the Berlin declaration.
27 March	The European Commission publishes the first call for proposals for the creation of new freight transport services under the second Marco Polo programme.
27 March	The Transport and Tourism Committee of the European Parliament votes on the second reading opinion on the Public Service Regulation. It approves amendments prohibiting the under-compensation of companies for the services they are requested to deliver, as well as an amendment setting a three-year minimum duration of contracts.
28 March	The Commission launches a debate on further use of market-based instruments to support environment and energy related policy purposes. The Green Paper aims to stimulate public debate on how taxes, tradable emissions rights and other market-based instruments can be used more widely and effectively for environmental and energy policy purposes.
27 April	The European Commission organises first European Road Safety Day.

POLITICAL EVENTS





UNIFE and CER chairmen exchanging the signed Letter of Intent on 18 May 2006.



Michel Boyon, President of RFF, welcoming the participants at the High-Level Infrastructure meeting dinner in Lyon on 24 May 2006.



Johannes Ludewig is welcomed by Edward R. Hamberger, President and CEO of the AAR, on 9 June 2006.



Johannes Ludewig, Susanna Huovinen, Finnish Transport Minister, and Henri Kuitunen on 19 June 2006.



Jose Antonio Torres Lacasa (DG ELARG), Frank Jost (DG TREN), Eddy Hartog (DG REGIO), Jan Scherp, Edgar Thielmann, Enrico Grillo Pasquarelli, Matthias Ruete (all DG TREN), Johannes Ludewig, Ad Toet (both CER), Tom Barret (EIB) listening to CEOs from Central and Eastern European railways at their annual meeting on 11 July 2006.

## CER EVENTS

### 2006

18 May	UNIFE and CER agree on closer cooperation at the 2006 UNIFE General Assembly in Geneva.
24 May	CER/EIM meeting of CEOs of Infrastructure Companies, Lyon.
30 May-1 June	The 46 <sup>th</sup> Joint Customs/railways meeting takes place in Riga.
1 June	CER participates in a European Commission workshop on Dedicated Freight Network.
7-8 June	CER Executive Director participates in the UIC Executive Committee, the UIC World Executive Committee meetings and in the UIC General Assembly, taking place in Montreal.
9 June	A CER delegation visits the Association of American Railroads in Washington.
15-16 June	A joint seminar organised by CER and ETF takes place in Tallinn on the subject of industrial relations and social dialogue for the Baltic railways.
19 June	CER Executive Director and Henri Kuitunen, President and Chief Executive Officer of VR-Group Ltd, meet with Susanne Huovinen, Transport Minister in the Finnish government, on the priorities of the upcoming Finnish presidency.
20 June	CER organises a seminar on specific CEEC infrastructure issues in Brussels.
22-23 June	A seminar organised by CER and ETF on industrial relations and social dialogue for the candidate countries Bulgaria and Romania takes place in Bucharest.
29-30 June	CER meeting of International Affairs Directors in Stockholm, hosted by ASTOC, the Association of Swedish Train Operating Companies, preceded by a seminar on ERTMS.
5 July	CER and ETF representatives meet at high level in the framework of the revision of the CER-ETF Agreement on Working Conditions (now Directive 2005/47/EC) in Brussels.
11 July	CEOs of the railways in Central and Eastern Europe meet in Brussels with the Director of the European Investment Bank (EIB), Tom Barrett, on the possibilities for EIB to finance rail investments in Central and Eastern Europe.
11 July	The annual meeting between the Director-General of DG TREN, Matthias Ruete, and the CEOs from Central and Eastern European railways takes place in Brussels.
13 July	The CER Management Committee comes together for its 40 <sup>th</sup> meeting in Brussels.
13 July	Members of the Management Committee of CER meet with Transport Commissioner and Commission Vice-President Jacques Barrot.
18 July	CER and the ERTMS Users Group sign a Memorandum of Understanding.
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## CER EVENTS

### 2006



Tom Barrett at the meeting between CEOs from Central and Eastern Europe and EIB on 11 July 2006.



Commissioner Barrot listening to CER at the meeting with CER Management Committee on 13 July 2006.



Drewin Nieuwenhuis and Johannes Ludewig meet with Polish Government representatives, Jerzy Kwieciński and Mirosław Chaberek on 19 July 2006.



Ferdinand Schmidt (Rail Cargo Austria), with Luc Aliadiere (UIC), Oliver Sellnick (UIC) and Klaus Kremper (Railion Deutschland) at the High-Level Freight meeting on 13 and 14 September 2006.



Vladimir Yakunin and Aad Veenman at the CER General Assembly on 19 September 2006.

19 July	CER and UNIFE, together with PKP meet in Warsaw with the State Secretary in the Ministry of Transport Mirosław Chaberek and the State Secretary in the Ministry for Regional Development Jerzy Kwieciński.
31 August	CER participates in the first meeting of the new Corridor E Management Committee in Vienna.
13-14 September	The CER-UIC High Level Freight meeting brings together the CEOs of European rail freight companies in Brussels.
18 September	CER Management Committee meeting in Berlin.
18 September	CER participates in the UIC Executive Board meeting in Berlin.
19 September	A special meeting between the CER CEOs from railways in Central and Eastern Europe takes place in Berlin.
19 September	CER General Assembly with guest speeches by Wolfgang Tiefensee, German Federal Minister for Transport, and Vladimir Yakunin, President of the Russian Railways RDZ.
20 September	CER participates in the 14 <sup>th</sup> Plenary meeting of the European Rail Research Advisory Council (ERRAC) in Berlin.
21-22 September	The CER-UIC High Level Passenger meeting takes place in Paris and is jointly organised by CER and UIC and hosted by SNCF.
25 September	CER participates in a meeting of the Railway Representative Bodies at the European Railway Agency (ERA) in its premises in Lille.
27 September	CER organises a working session on the proposed Regulation on rail passengers' rights in the European Parliament in Strasbourg, in cooperation with Dirk Sterckx, the designated EP rapporteur.
27 September	CER Executive Director attends the celebrations on the 80 <sup>th</sup> anniversary of the Polish State Railways PKP in Warsaw.
2 October	CER organises in close cooperation with the World Bank and the European Commission a seminar on railways in new EU Member States in Sofia.
3 October	Representatives from railway organisations based in Brussels meet with Nina Vaskunlahti, Finnish Deputy Permanent Representative, and Yrjö Mäkelä, Finnish transport attaché at the invitation of CER.
5 October	CER welcomes the European Passenger's Federation to the 12 <sup>th</sup> liaison meeting in Brussels.
5 October	CER participates in a consultation workshop on freight logistics, organised by the European Commission together with the Finnish Presidency of the European Union.
5 October	CER Executive Director together with Oleg Petkov, CEO of the Bulgarian State Railways (BDZ), meet with the Bulgarian Minister of Transport, Petar Mutafchiev in Sofia.
5-6 October	CER participates in the Conference on Economic Cooperation and Investment Opportunities in South East Europe, organised and hosted by the Centre for Strategic and International Studies (CSIS) in Washington.

## CER EVENTS



*Ines Ayala-Sender (EP), Dirk Sterckx (EP) and Johannes Ludewig (CER) at the CER-UIC High Level Passenger meeting in Paris on 21 and 22 September 2006.*



*Miklós Devecz, MAV, Colin Hall, CER, Dirk Sterckx, EP, Chris Mephan, ATOC, Alfred Pitnik, ÖBB and Christian Schwarzl, ÖBB at the meeting on rail passengers' rights on 27 September 2006.*



*Paivi Minkkinen, VR, Nina Vaskunlahti, Finnish Deputy Permanent Representative and Mika Mäkilä, VR at the Railway Community lunch on 3 October 2006.*



*Johannes Ludewig handing over the CER rail reform book to Lithuanian Transport Minister Butkevicius on 18 October 2006.*



*Johannes Ludewig, Rainer Freise, Matthias Ruete, Thomas Leimgruber, Enrico Grillo Pasquarelli and Patrizio Grillo at the meeting on the COTIF CUI appendix on 13 November 2006.*

### 2006

9-10 October	CER and ETF jointly organise the seminar on the 'Rail-Emplo' project of the Social Dialogue Committee for Railways in Brussels.
10 October	CER Executive Director meets with a group of German environmentalist NGOs at the invitation of MEP Michael Cramer (Greens, Germany) in Brussels.
12 October	CER and ETF participate in a Round Table discussion at the European Parliament in Brussels, at invitation of MEP Gilles Savary (PSE, France), rapporteur for the Directive on the certification of train crews.
18 October	CER meets with the Minister of Transport and Communications of the Republic of Lithuania Algirdas Butkevicius together with the Director General of the Lithuanian Railways (LG) Stasys Dailydka in Vilnius.
18 October	CER Executive Director addresses the 15 <sup>th</sup> Plenary Meeting of the Coordinating Council on Trans-Siberian Transportation (CCTT) with a speech in Vilnius.
18-19 October	CER participates in a specific training seminar on environmental performance as competitive advantage of the railways, organised by UIC in Sofia.
23 October	CER meets with the Chairman of RailNetEurope (RNE) Åke Josefsson in Brussels.
26 October	CER participates in the CIT 2006 General Assembly held in Berne.
26-27 October	CER participates in a seminar on relations between state and railways in the Baltic region, organised by the European Commission in cooperation with the Latvian section of the Association of European Rail Staff in Riga.
6 November	CER, EIM and ETF participate in the Steering Committee of the European Social Dialogue Committee for railways with representatives of ERA, DG TREN and DG Employment in Brussels.
9-10 November	CER participates in a conference on railway noise abatement in Pisa, jointly organised by the Italian Regional and Government Coordination unit, UIC and CER.
8 November	CER Executive Director meets for the first time with Maurizio Castelletti, successor of Jean-Arnold Vinois as Head of Unit for Rail Transport and Interoperability in DG TREN.
13 November	CER and CIT meet with Matthias Ruete and his staff on the issue of the non-application of the COTIF annex relating to the use of infrastructure.
14 November	Representatives of RNE, CER, and EIM come together in Brussels to discuss fields of cooperation.
29-30 November	CER speaks at the CIT conference on international transport law in Berne.
29 November-1 December	CER participates in a European Commission conference on the Marco Polo II programme in Nantes.
30 November	CER participates in the RNE Annual Business Conference in Vienna.
1 December	CER attends the 2 <sup>nd</sup> Annual Conference of the Transport Ministers of the SEETO signatory countries in Brussels.
4 December	CER participates in the European Commission conference "Mobility in the European Union: what place for rail?"



## CER EVENTS



Wolfgang Tiefensee and Johannes Ludewig on 11 December 2006.

### 2006



Johannes Ludwig addressing the plenary meeting of the 1<sup>st</sup> International Railway Symposium organised on the occasion of the 150<sup>th</sup> anniversary of Turkish Railways in Ankara on 13 and 14 December 2006.



Nikola Dimitrovski, CEO of Railways of Macedonia RFYROM, Mile Janakieski, Minister of Transport and Communications, Macedonia FYROM and Ad Toet at the workshop on drafting of network statements in South-Eastern Europe on 12 January 2007.



Jacques Dirand handing over the SEDP for the implementation of TAF TSI to Antonio Colaço, DG TREN on 18 January 2007.



Introductory speech by Jacques Barrot at the EurailFreight 2007 conference on 30 January 2007.

5 December	CER participates in the round table meeting on financing of rolling stock investments with EU funds, jointly organised by DG Enlargement/TAIEX and CER, in close cooperation with EIB and hosted by CD in Prague.
6 December	CER organises a farewell dinner for Benedikt Weibel, who was as a CEO of SBB for many years an active member of the CER Management Committee, in Paris.
7 December	CER Management Committee meeting, Paris.
7 December	CER participates in the UIC Executive Board meeting and UIC General Assembly, Paris.
11 December	CER meets with the German Minister of Transport Wolfgang Tiefensee in Brussels.
13-14 December	CER Executive Director speaks at the 1 <sup>st</sup> International Railway Symposium organised on the occasion of the 150 <sup>th</sup> anniversary of Turkish Railways in Ankara.
14 December	CER speaks at the seminar on Rail Safety Management, organised by the Hellenic Railways in cooperation with UIC in Athens.
15 December	CER meeting of International Affairs Directors, Athens.
15 December	CER participates in the 16 <sup>th</sup> RMMS (Rail Market Monitoring Scheme) meeting in Brussels.
19 December	CER meets with ETF for a high-level meeting on the renegotiation of the CER-ETF agreement on working conditions, Berlin.

### 2007

11-12 January	CER and the European Commission organise a workshop on drafting of Network Statements for the railway companies and infrastructure managers in the SEETO signatory countries in Skopje.
18 January	CER delivers the Strategic Deployment Plan (SEDP) for the implementation of the TAF-TSI Regulation on behalf of the involved organisations to the European Commission.
19 January	CER, EIM, UNIFE and UITP meet with Director General of DG TREN Matthias Ruete in Brussels.
24 January	CER, UIC, UIP and ERFA meet with the European Commission and the National Safety Authorities (NSAs) of Belgium, France, Germany and the UK to discuss the future of the legal framework for wagon maintenance.
25 January	CER Executive Director speaks at the symposium "Competition and Regulation in the Rail Sector" organised by the European School of Management and Technology.
29 January	CER welcomes a delegation from the Chinese Ministry of Transport in Brussels.
30 January	The CER conference EurailFreight 2007 : "Opening of the Rail Freight Market – a new opportunity for rail!" takes place in Brussels – organised in cooperation with the German Presidency.

## CER EVENTS



Aad Veenman signing the EurailFreight declaration on behalf of CER at the EurailFreight 2007 conference on 30 January 2007.



CER Rail Event on 30 January 2007.



EP President Hans-Gert Pöttering addressing the guests at the CER Rail Event on 30 January 2007.



Maurizio Castelletti, head of unit for rail at DG TREN, discussing with the CER General Assembly on 31 January 2007.



Eva Molnar, Zbigniew Szafranski, Erik Meijer and Johannes Ludewig at the discussion on under-compensation for public service obligations in the European Parliament on 13 March 2007.

### 2007

30 January	CER launches its new book <i>Competition in Europe's Rail Freight Market</i> .
30 January	CER RailEvent at SNCB/NMBS Schaerbeek maintenance workshop with 500 guests celebrating Europe's railways.
31 January	CER Management Committee meeting, Brussels.
31 January	CER General Assembly, Brussels, with participation of Maurizio Castelletti, Head of Unit for Rail Transport and Interoperability at DG TREN.
31 January	CER participates in the first UIC Regional Assembly for Europe, Brussels.
7 February	CER participates in a European Commission workshop on intermodal loading units.
9 February	CER meets with representatives of the Dutch Ministry of Transport together with Bart de Jong, Transport Councillor of the Dutch Permanent Representation in Brussels.
21-22 February	The third CER-UIC High-Level Freight meeting takes place in Vienna.
22 February	CER Freight CEOs appoint Jan Sundling, CEO of GreenCargo, as European TAF TSI coordinator.
23 February	CER participates in the Special meeting of CEOs from South East Europe (SEETO signatory countries) in Podgorice/Montenegro.
26 February	CER meets with DG TREN representatives Enrico Grillo Pasquarelli, Maurizio Castelletti and Patrick Rousseaux concerning the delivery of the official position of the railways on a Primary Freight Network.
26 February	CER meets with a delegation of East Japan Railway Company, chaired by its Vice-Chairman Yoshio Ishida, in Brussels.
2 March	CER participates in the 17 <sup>th</sup> meeting of the working group Rail Market Monitoring Scheme (RMMS).
6 March	CER Executive Director meets with Maurizio Castelletti, Head of Unit Rail Transport and Interoperability of EC, in Brussels.
13 March	CER Executive Director participates in the UIC European Management Committee meeting in Frankfurt/Main.
13 March	CER organises a discussion on under-compensation for public service obligations in the European Parliament in cooperation with Erik Meijer, the EP Rapporteur for the Regulation.
13 March	CER organises a discussion on under-compensation for public service obligations in the European Parliament in cooperation with Erik Meijer, the EP Rapporteur for the Regulation.
19 March	CER meets with Jacqueline McGlade, Executive Director of the European Environment Agency (EEA), in Brussels.
23 March	CER meets with Nancy Kontou, Head of Cabinet of the Environment Commissioner Stavros Dimas.
26 March	CER Executive Director meets with Vice-President Jacques Barrot, Brussels.

## CER EVENTS



*Peter Witt, German Deputy Permanent Representative and Colin Hall from CER at the Railway Community dinner on 26 March 2007.*



*Plamen Oresharski, Bulgarian Minister of Finance, Johannes Ludewig, and Petar Mutafchiev, Bulgarian Minister of Transport on 3 April 2007.*



*Johannes Ludewig with the Transport Minister of FYRO Macedonia Mile Janakieski on 4 April 2007.*

### 2007

26 March	The Brussels-based railway community meets with Peter Witt, Deputy Permanent Representative of Germany and current Chairman of COREPER I, in Brussels.
28 March	CER Executive Director participates in the meeting of the Rail Passenger Board of VDV, the Association of German Transport Undertakings, in Tübingen/ Germany.
29 March	Farewell reception for Colin Hall, CER Deputy Executive Director, and Ad Toet, CER Advisor for Central and Eastern Europe, Brussels.
29-30 March	CER meeting of International Affairs Directors, Brussels.
2 April	CER Executive Director meets with the new UNIFE General Director, Michael Clausecker, in Brussels.
3 April	CER meets in Sofia with the CEOs of NRIC and BDZ, the Bulgarian Minister of Finance, Plamen Oresharski, and with the Minister of Transport, Petar Mutafchiev.
3-4 April	CER meets with the Macedonian Minister for Transport and Communications, Mile Janakievski, in Skopje.
12 April	CER Executive Director meets with Matthias Ruete, Director General of DG TREN, in Brussels.
17 April	CER participates in the annual meeting of the European Social Dialogue Committee for Railways in Brussels in which Franz Nigl (ÖBB), new Chairman of the CER Human Resources Directors Group, is elected as Chairman of the Committee.
24 April	CER Executive Director and the CEOs of ZSSK, ZSSK CARGO, ŽSR meet with representatives of the Ministry of Transport and the Ministry of Finance of Slovakia in Bratislava.
2 May	CER Executive Director meets with Maurizio Castelletti, Head of Unit Rail Transport and Interoperability, in Brussels.

## MEMBER RAILWAY UNDERTAKINGS AND INFRASTRUCTURE COMPANIES

COUNTRY	Logo	NAME	ENGLISH NAME	ABBREVIATION	WEBSITE
Albania		Hekurudha Shqiptare	Albanian Railways	HSH	www.hsh.com.al
Austria		Österreichische Bundesbahnen	Austrian Federal Railways	ÖBB	www.oebb.at
Austria		Salzburger Lokalbahn	Salzburg Regional Railway	SLB	www.lokalbahn.info
Austria		Wiener Lokalbahnen	Vienna Regional Railway	WLB	www.wlb.at
Belgium		Société Nationale des Chemins de Fer Belges / Nationale Maatschappij der Belgische Spoorwegen Holding	Belgian National Railways	SNCB/NMBS	www.b-rail.be
Belgium/France		Thalys International	Thalys International	Thalys	www.thalys.com
Bosnia-Herzegovina		Željeznice Federacije Bosne i Hercegovine	Railways of the Federation of Bosnia-Herzegovina	ŽFBH	
Bosnia-Herzegovina		Željeznice Republike Srpske	Railways of the Republic of Srpska	ŽRS	
Bulgaria		Nacionalna Kompania Železopotna Infrastruktura	Bulgarian National Railway Infrastructure Company	NRIC	www.rail-infra.bg
Bulgaria		Balgarski Daržavni Železnitsi	Bulgarian State Railways	BDŽ	www.bdz.bg
Bulgaria		Bulgarian Railway Company	Bulgarian Railway Company	BRC	
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		Aktsiaselts Eesti Raudtee	Estonian Railways	EVR	www.evr.ee
Finland		VR-Yhtymä Oy	VR-Group – Finnish Railways	VR	www.vr.fi
France		Société Nationale des Chemins de Fer Français	French National Railway Company	SNCF	www.sncf.fr
France		Veolia Transport	Veolia Transport	Veolia Transport	www.veolia-transport.com
Georgia		Saqartvelos Rkinigza	Georgian Railway	GR*	www.railway.ge

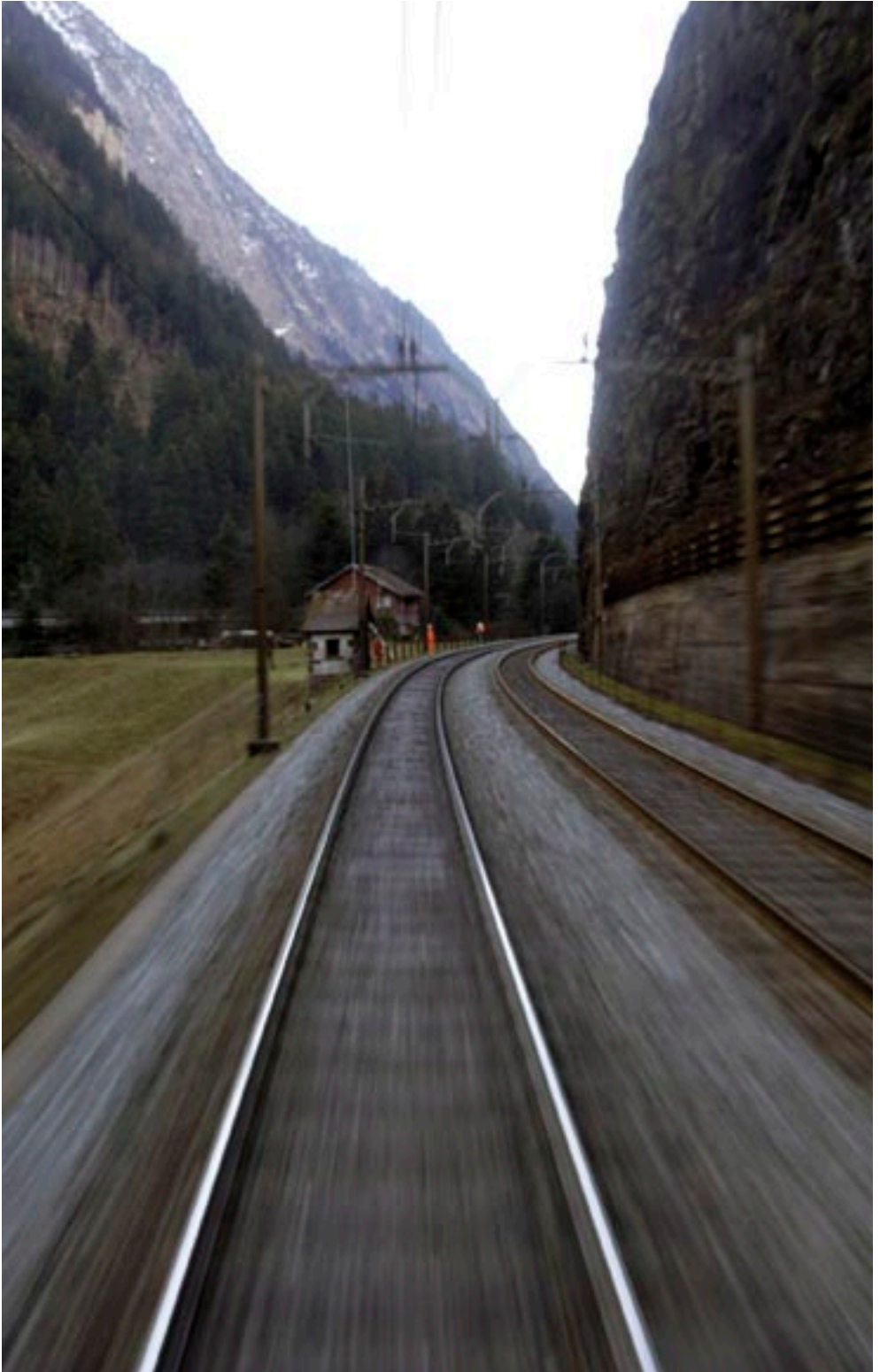
\* Associated member

## MEMBER RAILWAY UNDERTAKINGS AND INFRASTRUCTURE COMPANIES

COUNTRY	Logo	NAME	ENGLISH NAME	ABBREVIATION	WEBSITE
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		Magyar Államvasutak Cargo	Hungarian Rail Freight Company	MÁV Cargo	www.mavcargo.hu
Hungary		Vasúti Pályakapacitás-Elosztó	Hungarian Railway Capacity Allocator	VPE	www.vpe.hu
Hungary		Central-European Railway	Central-European Railway	CER	
Hungary		Magyar Vasúti Fuvarozói Egyesülés	Hungarian Railway Association	HRA	
Hungary/Austria		Győr-Sopron-Ebenfurth Vasút / Raab-Oedenburg-Ebenfurter Eisenbahn	Győr-Sopron-Ebenfurth Railway Company	GySEV/RoeEE	www.gysev.hu
Ireland		Córas Iompair Éireann	Irish Transport Group	CIÉ	www.irishrail.ie
Italy		Ferrovie dello Stato	Italian Railway Group	FS	www.ferroviedellostato.it
Latvia		Latvijas Dzelzceļš	Latvian Railways	LDZ	www.ldz.lv
Latvia		Baltijas Ekspresis	Baltic Rail Freight Company	BE	
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
Macedonia		Makedonski Železnici	Railways of the Former Yugoslav Republic Of Macedonia	RFYROM	www.mz.com.mk
Montenegro		Železnice Crne Gore	Railways of Montenegro	ŽCG	
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
Poland		Rail Polska	Rail Poland	Rail Polska	www.railpolska.pl
Poland		CTL Logistics	CTL Logistics	CTL	www.ctl.pl
Portugal		Caminhos de Ferro Portugueses	Portuguese Railway Company	CP	www.cp.pt

## MEMBER RAILWAY UNDERTAKINGS AND INFRASTRUCTURE COMPANIES

COUNTRY	Logo	NAME	ENGLISH NAME	ABBREVIATION	WEBSITE
Romania		Compania Națională de Cai Ferate	Romanian National Railway Company	CFR	<a href="http://www.cfr.ro">www.cfr.ro</a>
Romania		Societatea Națională de Transport Feroviar de Marfă	Romanian National Freight Train Operating Company	CFR Marfă	<a href="http://www.cfrmarfa.cfr.ro">www.cfrmarfa.cfr.ro</a>
Romania		Societatea Națională de Transport Feroviar de Călători	Romanian National Train Operating Company for Passenger Transport	CFR Călători	<a href="http://www.cfr.ro/calatori">www.cfr.ro/calatori</a>
Romania		Servtrans Invest	Servtrans Invest	Servtrans Invest	<a href="http://www.servtrans-invest.com">www.servtrans-invest.com</a>
Romania		Grup Feroviar Roman	Romanian Railway Group	GFR	<a href="http://www.gfr.ro">www.gfr.ro</a>
Serbia		Železnice Srbije	Serbian Railways	ŽS	<a href="http://www.yurail.co.yu">www.yurail.co.yu</a>
Slovakia		Železnice Slovenskej Republiky	Slovak Infrastructure Company	ŽSR	<a href="http://www.zsr.sk">www.zsr.sk</a>
Slovakia		Železničná Spoločnosť Slovensko	Slovak Railway Operator	ZSSK	<a href="http://www.slovakrail.sk">www.slovakrail.sk</a>
Slovakia		Železničná Spoločnosť Cargo Slovakia	Slovak Rail Freight Company	ZSSK Cargo	<a href="http://www.zscargo.sk">www.zscargo.sk</a>
Slovenia		Slovenske Železnice	Slovenian Railways	SŽ	<a href="http://www.slo-zeleznice.si">www.slo-zeleznice.si</a>
Spain		RENFE Operadora	National Spanish Railway Operator	RENFE Operadora	<a href="http://www.renfe.es">www.renfe.es</a>
Spain		Administrador de Infraestructuras Ferroviarias	Spanish Railway Infrastructure Manager	ADIF	<a href="http://www.adif.es">www.adif.es</a>
Sweden		Sveriges Branschföreningen Tågoperatörerna	Association of Swedish Train Operators	ASTOC	<a href="http://www.tagoperatörerna.se">www.tagoperatörerna.se</a>
Switzerland		Schweizerische Bundesbahnen/ Chemins de Fer Fédéraux Suisses/ Ferrovie Federali Svizzere	Swiss Federal Railways	SBB/CFF/FFS	<a href="http://www.sbb.ch">www.sbb.ch</a>
Switzerland		BLS Lötschbergbahn	Lötschberg Railway Company	BLS	<a href="http://www.bls.ch">www.bls.ch</a>
Turkey		Türkiye Cumhuriyeti Devlet Demiryolları	Turkish State Railways	TCDD	<a href="http://www.tcdd.gov.tr">www.tcdd.gov.tr</a>
United Kingdom		Association of Train Operating Companies	Association of Train Operating Companies	ATOC	<a href="http://www.atoc.org">www.atoc.org</a>
United Kingdom		English, Welsh and Scottish Railways	English, Welsh and Scottish Railways	EWS	<a href="http://www.ews-railway.co.uk">www.ews-railway.co.uk</a>
United Kingdom		Eurostar (UK)	Eurostar (UK)	Eurostar	<a href="http://www.eurostar.com">www.eurostar.com</a>



## CER GOVERNANCE

CER Presidency (2006 to 2007)				
Aad	VEENMAN	CER Chairman Chief Executive Officer	NS	Nederlandse Spoorwegen
Elio	CATANIA	CER Vice-Chairman <sup>1</sup> Chairman and Chief Executive Officer	FS	Ferrovie dello Stato
Louis	GALLOIS	CER Vice-Chairman <sup>2</sup> Chairman of the Board and Chief Executive Officer	SNCF	Société Nationale des Chemins de Fer Français
Jan	KOMÁREK	CER Vice-Chairman Director General	SŽDC	Správa Železniční Dopravní Cesty
Antoine	HUREL	CER Vice-Chairman <sup>3</sup> Deputy Chief Executive Officer	Veolia Transport	Veolia Transport
Hartmut	MEHDORN	CER Vice-Chairman <sup>4</sup> Chief Executive Officer	DB	Deutsche Bahn
Mauro	MORETTI	CER Vice-Chairman <sup>5</sup> Chief Executive Officer	FS	Ferrovie dello Stato

<sup>1</sup> until September 2006

<sup>2</sup> until July 2006

<sup>3</sup> member of the  
Management  
Committee, becomes  
CER Vice-Chairman in  
September 2006

<sup>4</sup> member of the  
Management  
Committee,  
CER Vice-Chairman from  
September 2006 to  
January 2007

<sup>5</sup> from January 2007

Members of the CER Management Committee (2006 to 2007)				
Aad	VEENMAN	CER Chairman Chief Executive Officer	NS	Nederlandse Spoorwegen
Louis	GALLOIS	CER Vice-Chairman <sup>1</sup> Chairman of the Board and Chief Executive Officer	SNCF	Société Nationale des Chemins de Fer Français
Elio	CATANIA	CER Vice-Chairman <sup>2</sup> Chairman and Chief Executive Officer	FS	Ferrovie dello Stato
Jan	KOMÁREK	CER Vice-Chairman Director General	SŽDC	Správa Železniční Dopravní Cesty



**Members of the CER Management Committee (2006 to 2007)**

Antoine	HUREL	CER Vice-Chairman <sup>3</sup> Deputy Chief Executive Officer	Veolia Transport	Veolia Transport
Hartmut	MEHDORN	CER Vice-Chairman <sup>4</sup> Chief Executive Officer	DB	Deutsche Bahn
Mauro	MORETTI	Vice-Chairman CER <sup>5</sup> Chief Executive Officer	FS	Ferrovie dello Stato
Benedikt	WEIBEL	UIC President <sup>6</sup> Chief Executive Officer	SBB / CFF / FFS	Chemins de Fer Fédéraux Suisses
António	RAMALHO <sup>1</sup>	President of the Board of Directors	CP	Caminhos de Ferro Portugueses
Roger	COBBE	Member of the Board	ATOC	Association of Train Operating Companies
Andrzej	WACH	President and Chief Executive Officer	PKP	Polskie Koleje Państwowe
Martin	HUBER <sup>7</sup>	Chief Executive Officer	ÖBB	ÖBB-Holding
Anne-Marie	IDRAC <sup>7</sup>	Chairwoman of the Board and Chief Executive Officer	SNCF	Société Nationale des Chemins de Fer Français
Christopher	AADNESEN <sup>8</sup>	Chairman of the Management Board and Managing Director	EVR	Aktsiaselts Eesti Raudtee
Jannie	HAEK <sup>8</sup>	Chief Executive Officer	SNCB / NMBS	Société Nationale des Chemins de Fer Belges Holding
István	HEINCZINGER <sup>8</sup>	Chief Executive Officer	MÁV	Magyar Államvasutak
Francisco José	CARDOSO DOS REIS <sup>8</sup>	President of the Board of Directors	CP	Comboios de Portugal
Constantin	AXINIA <sup>8</sup>	Managing Director	CFR	Compania Nationala de Cai Ferate

- <sup>1</sup> until July 2006
- <sup>2</sup> until September 2006
- <sup>3</sup> member of the Management Committee, becomes CER Vice-Chairman in September 2006
- <sup>4</sup> member of the Management Committee, CER Vice-Chairman from September 2006 to January 2007
- <sup>5</sup> from January 2007
- <sup>6</sup> until January 2006
- <sup>7</sup> from September 2006
- <sup>8</sup> until January 2007

Members of the CER General Assembly (as on 5 May 2007)				
Matej	AUGUSTÍN	Chairman of the Managing Board and Director General	ZSSK Cargo	Železničná Spoločnosť Cargo Slovakia
Constantin	MANEA	Managing Director	CFR	Compania Natională de Cai Ferate
István	BÁRÁNY	General Director	CER	Central-European-Railway
Josef	BAZALA	Chairman of the Board of Directors and CEO	ČD	České Dráhy
János	BERÉNYI	Chairman & Chief Executive Officer	HRA	Magyar Vasúti Fuvarozói Egyesülés
Liviu	BOBAR	General Director	CFR Marfă	Societatea Națională de Transport Feroviar de Marfă
Harald	BROCK	Director	WLB	Wiener Lokalbahnen
Richard	BROWN	Chief Executive Officer	Eurostar	Eurostar UK
George	BURUIANA	General Manager	Servtrans Invest	Servtrans Invest
Francisco José	CARDOSO DOS REIS	President of the Board of Directors	CP	Caminhos de Ferro Portugueses
Sorin	CHINDE	General Manager	GFR	Grup Feroviar Roman
Dionisios	CHIONIS	Managing Director	OSE	Organismos Siderodromôn Elladas
Milan	CHÚPEK	Chairman and Director General	ZSSK	Železničná Spoločnosť Slovensko
Roger	COBBE	Policy Director Arriva Train, Member of the ATOC Board	ATOC	Association of Train Operating Companies
Stasys	DAILYDKA	Director General	LG	Lietuvos Geležinkeliai
Jean-Michel	DANCOISNE	Director General	Thalys	Thalys International
Nikola	DIMITROVSKI	Director General	RFYROM	Makedonski Železnici
Vladimir	DUNCHEV	Executive Director	BRC	Bulgarian Railway Company
Narcis	DŽUMHUR	Director General, Chairman of the Board	ŽFBH	Željeznice Federacije Bosne i Hercegovine
Einar	ENGER	President and Chief Executive Officer	NSB	Norges Statsbaner

Members of the CER General Assembly (as on 5 May 2007)				
Søren	ERIKSEN	Chief Executive Officer	DSB	Danske Statsbaner
Irakli	EZUGBAYA	Director General	GR	Saqartvelos Rkinigza
Richard	FEARN	Chief Executive Officer	CIÉ	Córas Iompair Éireann
Anton	GINEV	General Director	NRIC	Nacionalna Kompania Železopatna Infrastruktura
Miodrag	GOMILANOVIC	President of the Board of Directors	ŽCG	Železnice Crne Gore
Antonio	GONZÁLEZ MARÍN	President	ADIF	Administrador de Infraestructuras Ferrovias
Jannie	HAEK	Chief Executive Officer	SNCB/ NMBS	Société Nationale des Chemins de Fer Belges Holding
István	HEINCZINGER	Chief Executive Officer	MÁV	Magyar Államvasutak
Keith	HELLER	Chief Executive Officer	EWS	English, Welsh & Scottish Railways
Timothy	HOLLAWAY	President of the Board & Chief Executive Officer	Rail Polska	Rail Polska
Martin	HUBER	Chief Executive Officer	ÖBB	Österreichische Bundesbahnen
Antoine	HUREL	Deputy Chief Executive Officer	Veolia Transport	Veolia Transport
Anne-Marie	IDRAC	Chairwoman of the Board and Chief Executive Officer	SNCF	Société Nationale des Chemins de Fer Français
Sokol	KAPIDANI	Director General	HSH	Hekurudha Shqiptare
Süleyman	KARAMAN	Chairman of the Board, Director General	TCDD	Türkiye Cumhuriyeti Devlet Demiryollari
Davorin	KOBAK	President of the Board	HŽ	Hrvatske Željeznice
Jan	KOMÁREK	Director General	SŽDC	Správa Železniční Dopravní Cesty
Tamás	KOZÁK	Chairman of the Board and Director General	MÁV Cargo	Magyar Államvasutak Cargo
Alex	KREMER	Director General and President of Committee of Directors	CFL	Société Nationale des Chemins de Fer Luxembourgeois

Members of the CER General Assembly (as on 5 May 2007)				
Henri	KUITUNEN	President and Chief Executive Officer	VR	VR-Yhtymä Oy
Gunter	MACKINGER	Chief Executive Officer	SLB	Salzburger Lokalbahn
Uģis	MAGONIS	Chairman of the Board	LDZ	Latvijas Dzelzceļš
Hartmut	MEHDORN	Chief Executive Officer	DB	Deutsche Bahn
Andreas	MEYER	Chief Executive Officer	SBB/CFP/FFS	Chemins de Fer Fédéraux Suisses
Mauro	MORETTI	Chief Executive Officer	FS	Ferrovie dello Stato
Alexandru	NOAPTES	General Director	CFR Călători	Societatea Națională de Transport Feroviar de Călători
Ljubo	PAŠALIĆ	Managing Director	ŽRS	Željeznice Republike Srpske
Oleg	PETKOV	Executive Director	BDŽ	Balgarski Darželeavni Železnitsi
Jaroslav	PAWLUK	Chief Executive Officer	CTL Logistics	CTL Logistics
Peter	PUHAN	Director General	SŽ	Slovenske Železnice
Carel	ROBBESON	Managing Director	Railion Nederland	Railion Nederland
István	PÁKOZDI	Managing Director	VPE	Vasúti Pályakapacitás-Elosztó
José	SALGUEIRO CARMONA	President of the Board of Directors	RENFE Op.	RENFE Operadora
Milanko	ŠARANČIĆ	Director General	ŽS	Železnice Srbije
Kaido	SIMMERMANN	Chairman of the Management Board & Managing Director	EVR	Aktsiaselts Eesti Raudtee
Ivars	SORMULIS	Chairman of the board	BE	Baltijas Ekspresis
Jan	SUNDLING	Chief Executive Officer Green Cargo, Chairman of the Board ASTOC	ASTOC	Sveriges Branschföreningen Tågoperatörerna
Csaba	SZÉKELY	Director General	GySEV / RoeEE	Győr-Sopron-Ebenfurth Vasút
Christian	THING	Managing Director	Railion Danmark	Railion Danmark

**Members of the CER General Assembly (as on 5 May 2007)**

Mathias	TROMP	Chief Executive Officer	BLS	BLS Lötschbergbahn
Aad	VEENMAN	President	NS	Nederlandse Spoorwegen
Andrzej	WACH	President & Chief Executive Officer	PKP	Polskie Koleje Państwowe
Dalibor	ZELENÝ	Director General	ŽSR	Železnice Slovenskej Republiky



## CER TEAM



*Front row:*

*Bart Roets, Ad Toet, Johannes Ludewig, Colin Hall, Silke Streichert, Carlo Corposanto, Paule Bollen, Libor Lochman.*

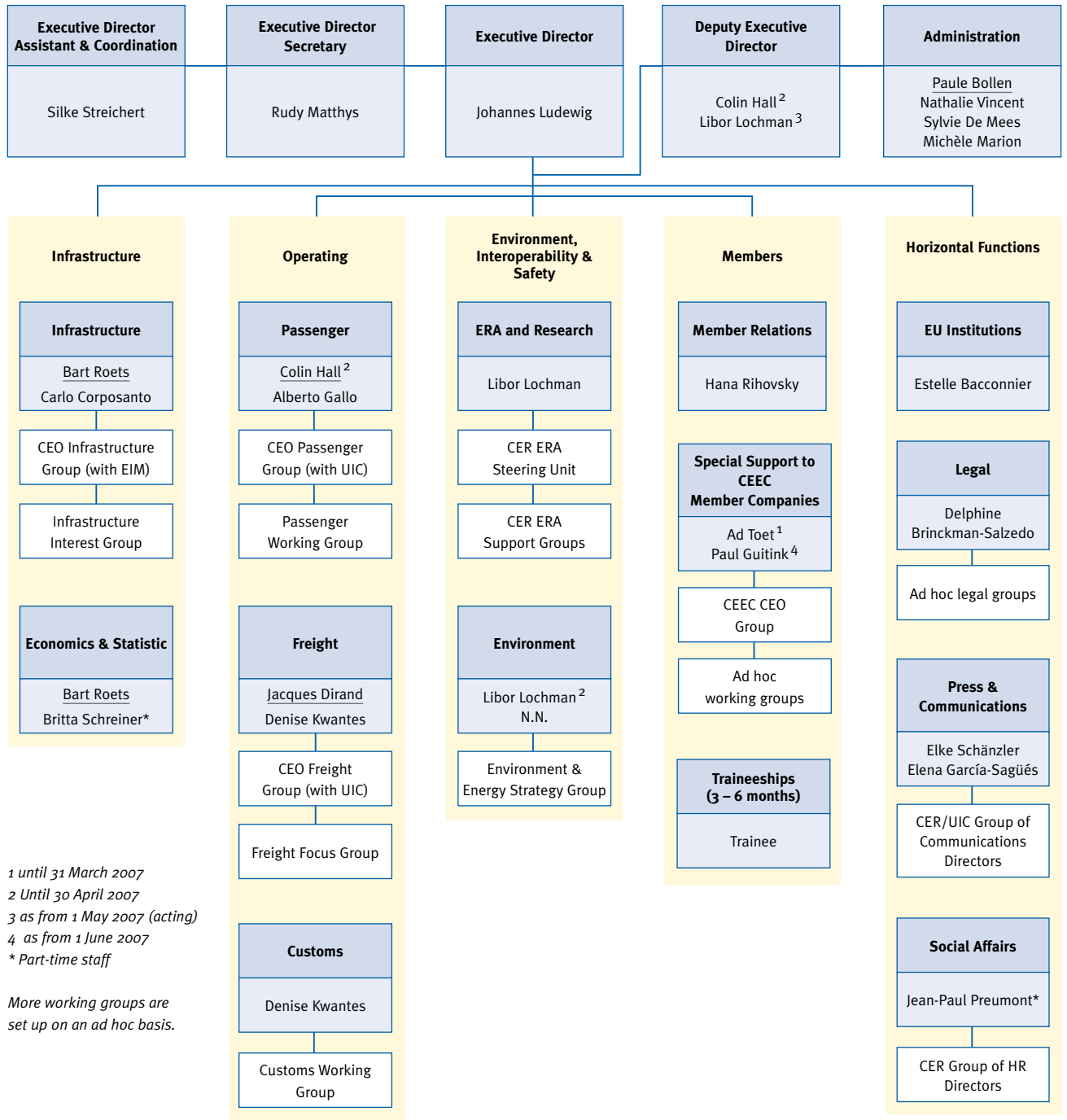
*Middle row:*

*Martins Ozolins, Denise Kwantes, Hana Rihovsky, Jacques Dirand, Britta Schreiner, Sylvie De Mees, Michèle Marion.*

*Back row:*

*Rudy Matthys, Alberto Gallo, Delphine Brinckman-Salzedo, Nathalie Vincent, Estelle Bacconnier, Elena García Sagüés, Jos Van Weyenberghe, Elke Schänzler, Jean-Paul Preumont.*

CER working structure



1 until 31 March 2007  
 2 Until 30 April 2007  
 3 as from 1 May 2007 (acting)  
 4 as from 1 June 2007  
 \* Part-time staff

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







## CER PUBLICATIONS

### Book

- CER (ed.): Competition in Europe's rail freight market, February 2007 (Eurailpress)

### CER Position Papers

- A new signalling system for Europe's trains, March 2007
- Rail transport in South East Europe: It all depends on regional cooperation, March 2007
- European Commission Report on the Implementation of the First Railway Package, September 2006
- Mid-term Review of the European Commission's 2001 Transport White Paper, September 2006

### CER Studies and Reports

- Noise reduction in European railway infrastructure. Status report 2007, May 2007 (CER/UIC publication).
- Noise reduction in rail freight. A 2007 on the state of the art, May 2007 (CER/UIC publication).
- Information interchange in rail freight. Improving customer service by innovative use of the Telematic Applications for Freight Regulation, May 2007
- The Social Dialogue in the Rail Sector: Towards a Strong Partnership in an enlarged Europe, November 2006
- Rail Diesel emissions – facts and challenges, September 2006 (CER/ UIC publication)

All publications, except for the book, can be ordered for free from the CER office or downloaded from [www.cer.be](http://www.cer.be).

The book can be ordered from the publisher Eurailpress, e-mail: [info@eurailpress.com](mailto:info@eurailpress.com).

For further documents such as press releases or fact sheets and older publications please check the CER website [www.cer.be](http://www.cer.be).

## RAILWAY STATISTICS 2006

CER Member	Country	Length of lines	Staff number	Passengers carried	Passenger-kilometres	Freight tonnes carried	Freight Tonne-km	Turnover	Profit
		in km		millions	millions	millions	millions	millions €	millions €
ADIF	Spain	12,991	14,287	–	–	–	–	1,132.8 <sup>p</sup>	-84.4 <sup>p</sup>
ASTOC	Sweden	–	11,000	n/a	9,600	n/a	16,100	n/a	n/a
ATOC	United Kingdom	15,810 <sup>d</sup>	n/a	1,147 <sup>p</sup>	45,600 <sup>p</sup>	–	–	7,159 <sup>p</sup>	n/a
BE	Latvia	–	127	–	–	2.7	990.0	12.5	0.4
BDŽ	Bulgaria	–	17,832	34.1	2,422	21.2	5,225	n/a	n/a
BLS <sup>i</sup>	Switzerland	392	2,446	40.7	596	14.1	3,255	495.9	10.8
BRC	Bulgaria	–	73	–	–	0.45	170	2.9	0.1
ČD <sup>h</sup>	Czech Republic	–	58,823	180.9	6,887	89	16,364	1,552.6 <sup>p</sup>	-15.9 <sup>p</sup>
CER	Hungary	–	10	–	–	0.6	186	5.7	n/a
CFL	Luxembourg	275	2,996	14.8	298	12.1	441	491.6 <sup>p</sup>	11.8 <sup>p</sup>
CFR Călători	Romania	–	17,078	93.2	8,049	–	–	656.0	126
CFR Marfă	Romania	–	18,236	–	–	52.0	11,600	505.1	12.2
CFR	Romania	10,781	28,996	–	–	–	–	n/a	n/a
CIÉ	Ireland	1,713 <sup>l</sup>	5,317	43	1,872	1.0	166	227.1	n/a
CP <sup>e</sup>	Portugal	–	4,311	133.2	3,514	9.8	2,430	259.5	-192.6
CTL Logistics	Poland	138	2,500	–	–	15.2	3,417	250.0 <sup>e</sup>	n/a
DB	Germany	34,128	229,200	1,854.0	74,788	307.6 <sup>f</sup>	96388 <sup>f</sup>	30,053.0	1,680.0
DSB	Denmark	2,323	9,207	166.0	5,848	–	–	1,422.0	97.0
Eurostar UK	United Kingdom	115	1,508	7.86	904.0	–	–	705.0	n/a
EVR	Estonia	1,280	2,342	–	–	44.4	10,267	116.4	15.9
EWS (ATOC) <sup>k</sup>	UK	–	4,836	–	–	83.9	16,379	n/a	n/a
FS	Italy	16,295	98,000	540.0	46,439	77.0	22,907	6,706.0	-2,115
GFR	Romania	–	1,103	–	–	4.7	1,243	57.1	8.3
GR <sup>a</sup>	Georgia	1,336	15,808	3.6	720	19.0	6,127	98.8	26.1
GySEV	Hungary	236	1,960	3.9	181	6.4	714	128.0	0.3
HRA <sup>m</sup>	Hungary	7,913	43,073	123.8	6,923	53.8	9,471	1,167.8	-236.4
HSH	Albania	423	2,078	1.7	80	0.5	36	n/a	n/a
HŽ	Croatia	2,722	13,748	46.2	1,362	15.4	3,305	n/a	n/a
LDZ	Latvia	2,269	14,074	27.4	992	48.7	15,273	270.1	n/a
LG	Lithuania	1,771	10,827	6.2	430	50.2	12,896	349.5	32.4
MÁV	Hungary	7,677	38,084	119.8	6,742	–	–	778.0	-317.3
MÁV Cargo	Hungary	–	3,019	–	–	46.8	9,279	351.9	10.6
NRIC	Bulgaria	4,146	15,831	–	–	–	–	116.7	-32.6
NS	Netherlands	2,829	15,620	328.0	15,414	–	–	2,430.0	198.0
NSB	Norway	4,087	2,493	48.9	2,517	–	–	456.1 <sup>b</sup>	71.3 <sup>b</sup>
ÖBB	Austria	5,702	42,951	196	8,646	93.0	18,868	5,466 <sup>n</sup>	32.3 <sup>o</sup>
OSE <sup>p</sup>	Greece	2,509	7,474	8.8	1,664	2.9	572	n/a	-683.9
PKP <sup>p</sup>	Poland	19,429	125,894 <sup>j</sup>	217.4 <sup>j</sup>	16,976 <sup>j</sup>	156.4	44,331	2,973.5 <sup>j</sup>	-25.8 <sup>j</sup>

# RAILWAY STATISTICS 2006

CER Member	Country	Length of lines in km	Staff number	Passengers carried millions	Passenger-kilometres millions	Freight tonnes carried millions	Freight Tonne-km millions	Turnover millions €	Profit millions €
Railion Danmark	Denmark	–	373	–	–	7.1	1,924	67.5	–2.3
Railion Nederland	Netherlands	–	982 <sup>q</sup>	–	–	31.1	4,524	180.8	n/a
Rail Polska	Poland	–	274	–	–	1.5	342	n/a	n/a
RENFE Operadora <sup>p</sup>	Spain	–	14,520	517.0	20,266	25.0	11,012	2,045.0	117.4 <sup>g</sup>
RFYROM	Macedonia	699	2,879	0.1	105	3.8	614	n/a	n/a
SBB/CFF/FFS	Switzerland	3,157	25,485	285.1	14,267	56	12,343	4,474.0	160.0
Servtrans Invest	Romania	7,429	637	0.1	4.0	3.8	890	26.8	0.8
SLB	Austria	34	78	4.7	88	1.6	179	n/a	n/a
SNCB/NMSB Holding	Belgium	3,500	36,496	187.5	8,521	59.4	8,442	3,217.3	–171.6
SNCF	France	–	164,404	1,001.2	78,465	108.3	40,924	16,743.0	138.0
SŽ	Slovenia	1,228	7,976	16.1	793	17.1	3,373	305.9	6.6
SŽDC	Czech Republic	9,492	647	–	–	–	–	817.8	140.9
TCDD	Turkey	8,697	28,741	77.4	5,277	19.4	9,440	n/a	n/a
Thalys	France/Belgium	–	105	6,570.5	2,311	–	–	363.2	n/a
Veolia Transport <sup>a</sup>	France	–	1,769	247	n/a	22.2	1,200	265.0	n/a
VPE <sup>c</sup>	Hungary	–	13	–	–	–	–	1.3	0.20
VR	Finland	5,905	10,180	65.0	3,606	43.6	11,060	780.5	35.3
WLB	Austria	30	370	9.7	467	1.9	645	48.1	0.02
ŽCG	Montenegro	330	1,958	1.1	108	1.7	182	n/a	n/a
ŽFBH	Bosnia-Herzegovina	608	3,871	0.4	30	6.6	772	53.1	n/a
ŽRS	Bosnia-Herzegovina	416	3,359	0.8	356	5.2	408	33	–8
ŽS	Serbia	3,809	20,857	14.07	836	14.1	4,232	313.0	–85.2
ŽSR	Slovakia	3,658	18,118	–	–	–	–	883.8	311.8
ZSSK	Slovakia	–	4,881	47.0	2,194	–	–	245.1	–2.5
ZSSK Cargo	Slovakia	–	11,375	–	–	50.1	9,703	640.8 <sup>e</sup>	7.5 <sup>e</sup>

– Not applicable

n/a Not available

<sup>a</sup> 2005 data

<sup>b</sup> Turnover and profit data contain results from subsidiaries not included in the other figures.

<sup>c</sup> VPE is a capacity allocation body for the Hungarian railway network. VPE does not provide passenger or freight services, nor is it an infrastructure manager.

<sup>d</sup> The reduction in the length of lines compared to last year is due to the closure of some freight lines. Routes open for passenger traffic increased from 14,328 km in 2005 to 14,356 km in 2006.

<sup>e</sup> Estimate

<sup>f</sup> Change to gross values in reporting year.

<sup>g</sup> EBITDA

<sup>h</sup> Based on a contract with SŽDC, ČD maintains the infrastructure and operates train management on 9,496 km of a total of 15,741 km of tracks.

<sup>i</sup> 2006 data of BLS include data of former BLS Lötschbergbahn and Regionalverkehr Mittelland (due to a merger).

<sup>j</sup> Excludes the company Koleje Mazowieckie (passenger regional services in the region Mazowiecki Voivodship) as of 2005.

<sup>k</sup> Staff numbers are full time employees only.

Volumes exclude rail industry movements. Data includes staff numbers and physical facts for Eurocargo Rail.

<sup>l</sup> Refers to active lines only.

<sup>m</sup> The Hungarian Rail Association (HRA) includes all representative Hungarian railway companies. The data indicated is the cumulative number for 2006.

<sup>n</sup> Turnover = "Gesamterträge"

<sup>o</sup> Profit = "Ergebnis der gewöhnlichen Geschäftstätigkeit – EGT"

<sup>p</sup> Provisional

<sup>q</sup> Full-time equivalent (FTE)

## LIST OF ABBREVIATIONS

AEIF	Association Européenne pour l'Interopérabilité Ferroviaire / European Association for Railway Interoperability
CCS	Control Command and Signalling System
CEEC	Central and Eastern European Countries
CEN	Comité Européen de Normalisation / European Committee for Standardisation
CENELEC	Comité Européen de Normalisation Electrotechnique / European Committee for Electrotechnical Standardisation
CER	Community of European Railway and Infrastructure Companies
CIM	Convention Internationale concernant le Transport des Marchandises par Chemin de Fer / International Convention concerning the Carriage of Goods by Rail
CIT	Comité International des Transports Ferroviaires / International Rail Transport Committee
EBU	European Blind Union
EC	European Commission
ECCP	European Climate Change Programme
EEA	European Environment Agency
EFTA	European Free Trade Association
EIM	European Rail Infrastructure Managers
EP	European Parliament
EPF	European Passenger Federation
ERA	European Railway Agency
ERIM	European Rail Infrastructure Masterplan
ERTMS	European Rail Traffic Management System
ETS	European Emissions Trading Scheme
ETSI	European Telecommunications Standards Institute
EU	European Union
GDP	Gross Domestic Product
IPCC	Intergovernmental Panel on Climate Change
NAP	National Allocation Plan
PERFN	Primary European Rail Freight Network
PRM	Persons with Reduced Mobility
RNE	RailNetEurope



## LIST OF ABBREVIATIONS

SEDP	Strategic European Deployment Plan
SEE	South-East Europe
SEETO	South East European Transport Observatory
TAF TSI	Technical Specification for Interoperability on Telematic Applications for Rail Freight
TEN-T	Trans-European Transport Network
TRAN	Committee on Transport and Tourism in the European Parliament
TSI	Technical Specifications for Interoperability
UIC	Union Internationale des Chemins de fer / International Union of Railways
UIP	International Union of Private Wagons
UITP	International Union of Public Transport
UNIFE	Union of European Railway Industries



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