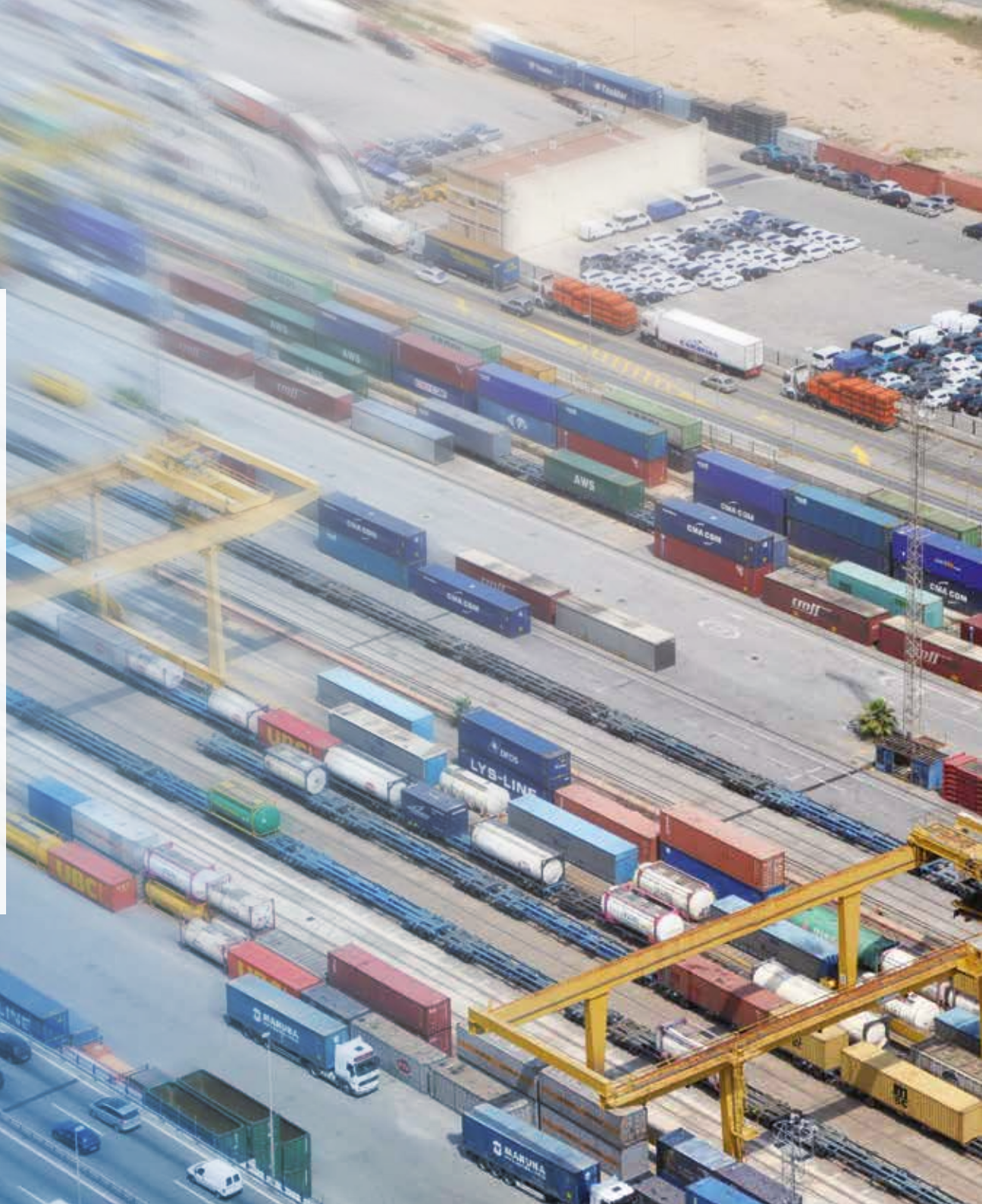




Annual Report

2017





The Community of European Railway and Infrastructure Companies (CER) brings together more than 70 railway undertakings, their national associations as well as infrastructure managers and vehicle leasing companies. The membership is made up of long-established bodies, new entrants and both private and public enterprises, representing 73% of the rail network length, 77% of the rail freight business and about 93% of rail passenger operations in EU, EFTA and EU accession countries. CER represents the interests of its members towards EU policy makers and transport stakeholders, advocating rail as the backbone of a competitive and sustainable transport system in Europe.

Publisher: Community of European Railway and Infrastructure Companies (CER), Avenue des Arts 53, 1000 Brussels - Belgium

Published in January 2018

For more information, see www.cer.be

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2017

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Foreword

Crister Fritzson

CER Chairman

It is a great honour for me to have been elected CER Chairman on 25 September 2017, after a period in the position as Acting Chair, following the stepping down of Dr. Rüdiger Grube. Under his chairmanship, the association worked on a number of topics important to the strengthening of Europe's rail sector. I would like to thank him for his strong commitment and drive. Together with all the members as well as CER's Executive Director Libor Lochman and his dedicated team of co-workers – I will take on the challenges, responsibilities and opportunities in the railway sector and work hard to bring it forward.

This CER Annual Report provides an overview of the association's main focus during the past year. As a general message of relevance to ongoing as well as upcoming legislative proposals, I find it important to stress that excessive regulation constitutes a burden that undermines competitiveness. In particular, additional very detailed sector-specific legislation should be avoided, unless it clearly leads to fulfilling certain goals. The railway sector continues to compete against other modes that often face simpler and less intrusive regulatory frameworks.

2018 will be the 30th anniversary of CER. Looking back at everything that has happened over the lifespan of the association since 1988 provides us with important perspectives on what it is possible to achieve in this sector. Working in close cooperation with the European institutions, considerable progress has been made in creating a single European railway market and better conditions for rail. We have seen an uptick in investments and remarkable technological development, affecting infrastructure, rolling stock and all kinds of rail-related services, with a profound impact on what kind of mobility solutions we can offer our customers.

We can only begin to imagine what we will see in the next 30 years, but to me it is clear that rail will continue to have a very important role to play as an enabler of personal mobility, the flow of goods, expanding labour markets and integration, thereby contributing to growth and the improved competitiveness of Europe as a whole. Rail will remain superior in terms of offering fast, high-capacity connections with efficient use of both energy and space.

Already now and in the near future, we can foresee that digitalisation and automation will offer huge opportunities. It is crucial that rail can continue to innovate, at a higher pace and as a front-runner compared to other modes in this regard. Simultaneously, we also need to continue our joint efforts to establish smart and attractive multimodal solutions. It is therefore welcome that the European Commission has declared 2018 to be a year focused on multimodality, aiming to improve the integration of all modes in the EU transport system.

Crister Fritzson
CER Chairman



Foreword

**Libor
Lochman**
CER Executive Director

Following the conclusion of the Fourth Railway Package in December 2016, many Brussels-based transport stakeholders thought that 2017 would be a more relaxed year – a forecast quite far from reality. CER is today as busy as ever on a variety of topics that will have a deep impact on Europe's mobility.

In 2017, CER devoted a great deal of effort to the implementation of the Fourth Railway Package's **Safety and Interoperability Directives**. The harmonisation of certification and authorisation processes under the control of the EU Agency for Railways represents a major leap forward in shaping a real Single European Railway Area, and fostering better services for passengers and goods – an opportunity that CER wants to use in the best possible way.

In May 2017, the European Commission published the legislative package **Europe on the Move**. At its core is the revision of the Eurovignette Directive as well as the redefinition of several aspects of drivers' working conditions. It will be another chance to redress the current shortcomings in intermodal competition from the aspect of infrastructure charging and internalisation of external costs while contributing to safer European roads.

CER has been following the **Brexit** negotiations, acting as an essential interlocutor for the EU institutions by highlighting potential challenges and their corresponding solutions. By providing highly relevant sector expertise, CER aims to support its members to mitigate any negative effect on rail's passenger and freight business that an abrupt Brexit may cause.

The debate on the shape and size of the EU's next **Multiannual Financial Framework** (MFF) is already heating up, and CER's key message is that rail infrastructure but also rolling stock and system technology need sufficient resources in the future MFF and a strong grant-based policy such as the Connecting Europe Facility.

On the technological front, **ERTMS** is entering a large-scale pan-European deployment phase, so that principal corridors should be fully equipped in less than a decade. Now it will be essential to find funding and financial

tools enabling railway undertakings to retrofit their locomotives as soon as possible. CER will stay at the heart of the ongoing coordination with its members and the policymakers in order to achieve this ambitious target.

CER is committed to the dialogue with the sector's social partners, especially in the context of the **European Sectoral Social Dialogue for Railways**. Common challenges such as the integration of more women in the labour force and the attractiveness of railway professions are better tackled together. CER has also started a project with the European Transport Workers' Federation to assess the application of the 2004 landmark agreement on the working conditions of international rail mobile workers.

Last but not least, CER continues to hold its invaluable discussions with representatives of customers' associations. The recent recast of Regulation 1371/2007 on **rail passenger rights** as well as other important files such as the **European Accessibility Act** (EAA) have been at the centre of the debate. The sector has made high satisfaction levels among rail customers its own long-standing commitment, and because of this CER is aiming to ensure that any policy initiative enables rail operators to keep up the good work in this area.

It is with these priorities in mind that we will continue representing the European rail sector at EU level. Our energy to shape these pivotal aspects of transport policy will sustain the momentum needed to achieve progress on all fronts.

I invite you to read the following pages of our Annual Report in order to discover more about CER, and I look forward to meeting you soon.

Libor Lochman
CER Executive Director

1

CER at a glance

1.1 The Voice of European Railways

Recognised as the voice of European railways for more than 25 years, CER's role is to represent the interests of its members by actively providing an input to EU policy, in particular to support an improved business and regulatory environment for European railway undertakings and infrastructure managers.

CER at a glance

CER is the Community of European Railway and Infrastructure Companies.

- ▶ **Founded in 1988**
- ▶ **Based in Brussels**
- ▶ **Has a team of 20+ employees from across Europe**

CER is the **only European association** that represents the entire railway system.

CER mission

Represent the interests of its members on the EU policy-making scene to support an improved business and regulatory environment for European railway undertakings and railway infrastructure companies.

CER membership

CER represents more than 70 members and partners.

 **73%**
of the European rail network length

 **77%**
of the European rail freight business

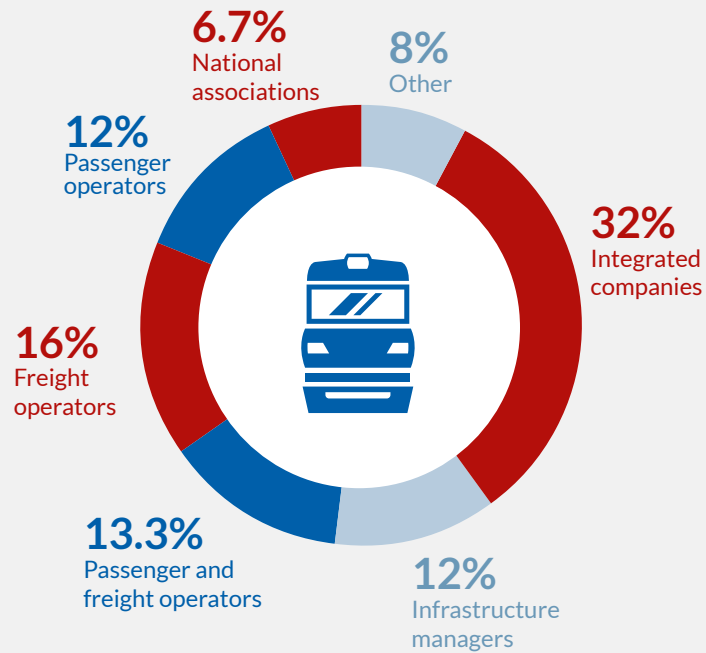
 **93%**
of rail passenger operations in Europe

CER members and partners come from:

EU-28, Norway, Switzerland, EU candidate countries (Macedonia, Montenegro, Serbia, Turkey), and Western Balkan countries. CER also has partners in Georgia, Israel, Japan, Moldova, and Ukraine.

CER has a diversity of members

ranging from long-established bodies to new entrants and both private and public-sector organisations.



Who we work with

More than
70
members
and partners

- ▶ **European institutions**
Council of the EU, European Commission, European Parliament, European Union Agency for Railways, Shift2Rail
- ▶ **Other organisations including:**
Allrail, ASECAP, CEEP, CIT, EBRD, EIB, EFRTC, EIM, EPF, ERF, ERFA, ETF, IRU, OTIF, OSJD, RNE, SEETO, T&E, UIC, UNIFE, UIP, UIRR, UITP, and World Bank

1.2 CER members (as of September 2017)

Country	Name	Logo
ALBANIA	Hekurudha Shqiptare (HSH) <i>Albanian Railways</i>	
AUSTRIA	Fachverband der Schienenbahnen (WKO) <i>Austrian Railway Association</i>	
AUSTRIA	Österreichische Bundesbahnen (ÖBB) <i>Austrian Federal Railways</i>	
AUSTRIA	Salzburger Lokalbahn (SLB) <i>Salzburg Regional Railway</i>	
BELGIUM	Lineas <i>Private freight railway undertaking</i>	
BELGIUM	Société Nationale des Chemins de fer Belges/ Nationale Maatschappij der Belgische Spoorwegen (SNCB/NMBS) <i>Belgian National Railway Company</i>	
BELGIUM	Thalys International (Thalys) <i>International passenger railway undertaking</i>	
BOSNIA-HERZEGOVINA	Željeznice Federacije Bosne i Hercegovine (ŽFBH) <i>Railways of the Federation of Bosnia-Herzegovina</i>	
BOSNIA-HERZEGOVINA	Željeznice Republike Srpske (ŽRS) <i>Railways of the Republic of Srpska</i>	
BULGARIA	Bălgarski Dăržavni Železnici (BDŽ Holding) <i>Bulgarian State Railways</i>	
BULGARIA	Bulgarian Railway Company (BRC) <i>Private freight railway undertaking</i>	
BULGARIA	Bulmarket <i>Private freight railway undertaking</i>	

Country	Name	Logo
BULGARIA	Nacionalna Kompania Železopatna Infrastruktura (NRIC) <i>National Railway Infrastructure Company</i>	
CROATIA	Hrvatske Željeznice Cargo (HŽ Cargo) <i>Croatian Railways Cargo</i>	
CROATIA	Hrvatske Željeznice Infrastruktura (HŽ Infrastruktura) <i>Croatian Railways Infrastructure</i>	
CROATIA	Hrvatske Željeznice Putnički Prijevoz (HŽPP) <i>Croatian Railways Passenger Transport</i>	
CZECH REPUBLIC	České Dráhy (ČD) <i>Czech Railways</i>	
CZECH REPUBLIC	Správa Železniční Dopravní Cesty (SŽDC) <i>Czech Railway Infrastructure Administration</i>	
DENMARK	Danske Statsbaner (DSB) <i>Danish State Railways</i>	
ESTONIA	Eesti Raudtee (EVR) <i>Estonian Railways</i>	
FINLAND	VR-Yhtymä (VR Group) <i>State railways of Finland</i>	
FRANCE	Société Nationale des Chemins de Fer Français (SNCF) <i>French National Railway Company</i>	
GERMANY	Deutsche Bahn (DB) <i>German Rail</i>	
GERMANY	Verband Deutscher Verkehrsunternehmen (VDV) <i>Association of German Transport Companies</i>	
GREECE	Organismós Sidirodrómon Elládos (OSE) <i>Hellenic Railways Organisation</i>	

Country	Name	Logo
GREECE	TRAINOSE National passenger railway undertaking	
HUNGARY	Győr-Sopron-Ebenfurti Vasút/Raab-Oedenburg-Ebenfurter Eisenbahn (GySEV) Hungarian-Austrian railway undertaking	
HUNGARY	Magyar Vasúti Egyesület (HUNGRAIL) Hungarian Railway Association	
HUNGARY	Magyar Államvasutak (MÁV) Hungarian State Railways	
IRELAND	Iarnród Éireann (IÉ) Irish Rail	
ITALY	Ferrovie dello Stato Italiane (FS Italiane) Italian State Railways	
LATVIA	Baltijas Ekspressis (BE) Private freight railway undertaking	
LATVIA	Baltijas Transīta Serviss (BTS) Private freight railway undertaking	
LATVIA	Latvijas Dzelzceļš (LDZ) Latvian Railways	
LITHUANIA	Lietuvos Geležinkeliai (LG) Lithuanian Railways	
LUXEMBOURG	Société Nationale des Chemins de Fer Luxembourgeois (CFL) Luxembourg National Railway Company	
LUXEMBOURG	CFL Cargo Luxembourg Rail Cargo Company	
MACEDONIA	Makedonski Železnici Infrastruktura (MŽ Infrastructure) Macedonian Railway Infrastructure	
MACEDONIA	Makedonski Železnici Transport (MŽ Transport) Macedonian Railway Transport	

Country	Name	Logo
MONTENEGRO	Montecargo National freight railway undertaking	
MONTENEGRO	Željeznička Infrastruktura Crne Gore (ŽICG) Railway Infrastructure of Montenegro	
NETHERLANDS	Nederlandse Spoorwegen (NS) Dutch Railways	
NORWAY	Norges Statsbaner (NSB) Norwegian State Railways	
POLAND	Polskie Koleje Państwowe (PKP) Polish State Railways	
POLAND	Rail Polska Private freight railway undertaking	
PORTUGAL	Comboios de Portugal (CP) Portuguese Railways	
ROMANIA	Compania Națională de Căi Ferate (CFR) National Rail Infrastructure Company	
ROMANIA	Societatea Națională de Transport Feroviar de Călători (CFR Călători) National Rail Passenger Transport Company	
ROMANIA	Societatea Națională de Transport Feroviar de Marfă (CFR Marfă) National Rail Freight Transport Company	
ROMANIA	Grup Feroviar Roman (GFR) Private freight railway undertaking	
ROMANIA	Regiotrans Private passenger railway undertaking	
ROMANIA	Transferoviar Grup (TFG) Private railway undertaking	

Country	Name	Logo
SERBIA	Železnice Srbije (ŽS) Serbian Railways	
SERBIA	Srbija Voz (ŽS Passenger) National passenger railway undertaking	
SERBIA	Infrastruktura Železnice Srbije (ŽS Infrastructure) Infrastructure of Serbian Railways	
SLOVAKIA	Železnice Slovenskej Republiky (ŽSR) National railway infrastructure manager	
SLOVAKIA	Železničná Spoločnosť Slovensko (ŽSSK) National passenger railway undertaking	
SLOVAKIA	Železničná Spoločnosť Cargo Slovakia (ŽSSK Cargo) National freight railway undertaking	
SLOVENIA	Slovenske Železnice (SŽ) Slovenian Railways	
SPAIN	Renfe Operadora (Renfe) National railway undertaking	
SWEDEN	Sveriges Branschföreningen Tågoperatörerna (ASTOC) Association of Swedish Train Operating Companies	
SWITZERLAND	BLS Regional railway undertaking	
SWITZERLAND	Schweizerische Bundesbahnen/Chemins de Fer Fédéraux Suisses/Ferrovie Federali Svizzere (SBB/CFF/FFS) Swiss Federal Railways	
TURKEY	Türkiye Cumhuriyeti Devlet Demiryolları (TCDD) Turkish State Railways	

Country	Name	Logo
UNITED KINGDOM	Eurostar International (Eurostar) International passenger railway undertaking	
UNITED KINGDOM	High Speed Two (HS2) Company developing the UK's new high-speed rail network	
UNITED KINGDOM	Rail Delivery Group (RDG) Association of passenger and freight operators in the UK (passenger section only)	

Partners

Country	Name	Logo
GEORGIA	Georgian Railway (GR)	
HUNGARY	Vasúti Pályakapacitás-Elosztó (VPE) Hungarian Railway Capacity Allocator	
ISRAEL	Israel Railways (ISR)	
JAPAN	East Japan Railway Company (JR East)	
LATVIA	Rail Baltica (RB Rail) Joint venture developing the Rail Baltica infrastructure project	
MOLDOVA	Calea Ferată din Moldova (CFM) Moldovan Railways	
NETHERLANDS	Eurail Group (Eurail) Company managing Eurail and Interrail products	
NETHERLANDS	Mitsui Rail Capital Europe (MRCE) Locomotive leasing company	
SWITZERLAND	Trasse Schweiz (trasse.ch) Swiss train path allocating body	
UKRAINE	Ukrzaliznytsia (UZ) Ukrainian Railway	

1.3 CER activities and political events

1 January

Malta takes over the rotating Presidency of the Council of the European Union.

5 January

The European Commission puts in place a new ERTMS Deployment Plan.

17 January

The European Parliament elects Antonio Tajani (EPP, IT) as its President for a 2.5 year period.

23 January

CER attends the New Year's reception *A Europe that leaves no one behind* given by the Disability Intergroup of the European Parliament.

1 February

CER Executive Director Libor Lochman speaks at a debate organised by MEP Olga Sehnalova (S&D, CZ) addressing the issues of the Czech railway system.

2 February

CER Executive Director Libor Lochman meets with ERTMS Coordinator Karel Vinck.

7 February

The European Railway Award celebrates its 10th Anniversary.

7 February

CER Executive Director Libor Lochman meets Dunja Perko and Alessandro Carano who have recently joined the cabinet of European Transport Commissioner Violeta Bulc.

2017

January

February

18 January

CER and the other members of the European Rail Research Advisory Council (ERRAC) meet in plenary.

23 January

CER attends the stakeholder conference on the European Pillar of Social Rights, also attended by EC President Jean-Claude Juncker, EP President Antonio Tajani and several Commissioners and national Ministers.



7 February

The European Commission publishes the first ever CEF Blending Call for Proposals.

8 February

The CER General Assembly appoints Crister Fritzson (ASTOC/SJ) as CER Acting Chairman with immediate effect. New partners are Israel Railways and Rail Baltica AS.

8 February

Deutsche Bahn, HŽ Infrastruktura, Trainose, and ŽS Infrastruktúra add their signatures to the rail sector's 'Homeless Charter' in the presence of DG MOVE Director-General Henrik Hololei.

15 February

The European Parliament adopts its position on the reform of the Emissions Trading System.

23 February

A first steering committee meeting kicks-off the new CER-ETF project *Rail Mobile Workers*.

28 February

Europe's Environment Ministers adopt a Council General Approach on the reform of the Emissions Trading System.

15 March

The European Parliament adopts the Mureşan Report related to the 2018 EU budget. Of particular interest: a call to assess the potential cost and funding sources of the *18th birthday Interrail pass for Europe* initiative.

17 March

CER Executive Director Libor Lochman speaks at the European Passenger Federation's (EPF) annual conference in Rotterdam.



17 March - Annual EPF conference in Rotterdam.

6 April

CER organises a joint meeting with members of the European Shippers Council.

19 April

The signatories of the Sector Corridor Statement form the Sector Statement Group (SSG). The SSG will meet twice a year, once in April and once in October.

24 April

CER Executive Director Libor Lochman speaks at the European Commission Noise in Europe conference in Brussels.

**28 February**

CER participates in the event *Accessibility in practice: lessons for the European Accessibility Act* organised by DigitalEurope.

6 March

CER participates in a meeting organised by the European Commission with National Enforcement Bodies on Regulation 1371/2007 on rail passenger rights.

9 March

The European Council re-elects Donald Tusk as its president for a second term of 2.5 years (until 30 November 2019).

22 March

CER takes part in the good practice exchange event of the EU-OSHA *Healthy Workplaces for All Ages* campaign, as an official campaign partner.

23 March

The CER/UIC High-Level Passenger Meeting is hosted by CFL in Luxembourg.

27 March

CER Executive Director Libor Lochman meets Silvio Mascagna, Member of Cabinet of Commissioner Julian King, responsible for the Security Union.

28 March

CER attends the first RU Dialogue – PRIME joint meeting.

28 March

The Platform for Electro-Mobility, of which CER is a founding member, hosts a high-level event in the European Parliament.

29 March

The fourth RU Dialogue plenary meeting takes place in Brussels.

30 March

Shift²Rail Executive Director Carlo Borghini addresses the CER Assistants at their meeting in Brussels.

24 April

At the VAT Expert Group meeting chaired by the European Commission, CER highlights important technical issues related to the Commission's preferred idea of 'VAT at departure'. CER also reiterates its call for rail to enjoy VAT exemptions in the same way as aviation.

26 April

The European Commission and the European Union Agency for Railways kick-off a series of conferences promoting the implementation of the Fourth Railway Package's Technical Pillar. Dates of the other conferences: 10 May, 23 May, 7 June, 14 June, and 20 June.

26 April

CER Executive Director Libor Lochman is invited to speak at the LANDSEC (land transport security) meeting organised by the European Commission.

26 April

The European Commission publishes its proposal for a European Pillar of Social Rights. The Pillar sets out 20 key principles and rights to support fair and well-functioning labour markets and welfare systems. The proposal is accompanied by a first set of legislative proposals and consultation initiatives in the social field.



3 May - CER noise conference

3 May

CER organises a high-level conference to explore solutions to further reduce rail freight noise. European Commissioner for Transport Violeta Bulc delivers the keynote speech.

4 May

The CER/UIC High-Level Freight Meeting takes place in Brussels.



4 May - High-Level Freight Meeting

April

May

27-28 April

The CER Group of Human Resources Directors meets in Naples. FSI President Gioia Ghezzi is also present.



27-28 April - The CER Group of Human Resources Directors meets in Naples

9 May

The Customer Liaison Group (CLG) meets in Brussels.



The members of the CER Customer Liaison Group (CLG)

10 May

CER, the European Commission (DG TAXUD) and the national customs authorities meet in Budapest for the annual Joint Customs Meeting, kindly hosted by Rail Cargo Hungaria.

16-17 May

The first workshop of the CER-ETF Rail Mobile Workers project takes place in Berlin (focus on Belgium, UK/France border, Germany, Luxembourg, the Netherlands).

12 June

The 10th PRIME plenary meeting takes place in Sopron.

13 June

The 2017 CER/EIM High-Level Infrastructure Meeting takes place in Sopron, at the joint invitation of GYSEV, MÁV Co, and VPE.



13 June - High-Level Infrastructure Meeting

June

24 May

Chaired by Crister Fritzson, the CER Management Committee meets in Berlin, kindly hosted by Deutsche Bahn.

31 May

The European Commission publishes *Europe on the Move*, a set of mobility initiatives.

8 June

The Group of Representative Bodies (GRB) invites Josef Doppelbauer (Executive Director, EU Agency for Railways) to discuss the most important issues concerning the implementation of the Fourth Railway Package's Technical Pillar.



20 June - CER Assistants meeting in Tbilisi

14 June

CER, jointly with ECF and NS, promotes bike-train solutions at the 2017 Velo-city conference in Amsterdam.

15 June

CER participates in the COLPOFER General Assembly taking place in Moscow.

20 June

The CER Assistants meeting takes place in Tbilisi, kindly hosted by CER partner Georgian Railways.

21-22 June

The second workshop of the CER-ETF Rail Mobile Workers project takes place in Krakow (focus on Czech Republic, Lithuania, Hungary, Poland, Slovak Republic)

29 June

Transport attachés from the EU Member States travel to Paris to learn about an innovative solution to urban congestion: the tram-train. Organised by CER together with the Maltese Presidency of the EU and the kind support of SNCF, the excursion takes place as part of CER's series of events with the rotating presidency of the Council of the EU.

29 June

Clio Liégeois is elected new chair of the EU Agency for Railways' Management Board.



29 June - CER event with the Maltese Presidency

16 September

CER Executive Director Libor Lochman meets the Ukrainian Minister of Infrastructure.

16 September

The European Commission's European Mobility Week takes place from 16 to 22 September across more than 2 000 towns and cities.



27 September - CER event on infrastructure charging

27 September

CER, jointly with ERF and ASECAP, organises the panel discussion *Infrastructure charging in land transport: challenges and way forward*, kindly supported by the Estonian Presidency of the EU.

June

September

July

1 July

Estonia takes over the rotating Presidency of the Council of the European Union.

11 July

CER holds its 2017 summer cocktail in Brussels.



11 July - CER summer cocktail

13 July

The Sector Statement Group, endorsed by the Rail Freight Corridors, meets in Brussels.

13 September

President of the European Commission, Jean-Claude Juncker delivers his 'State of the Union' address at the European Parliament in Strasbourg.

14 September

The European Parliament adopts its report on the European Accessibility Act.

21 September

At the margin of the informal Transport Council meeting, the Estonian Presidency together with the European Commission organises the Connecting Europe Conference in Tallinn.

25 September

The CER Management Committee and General Assembly take place in Gdańsk, kindly hosted by PKP. Among the bodies' main decisions is the confirmation of Crister Fritzson as the association's Chair and the election of the Management Committee for the 2018-2019 term.



25 September - CER General Assembly



Crister Fritzson and Libor Lochman

28 September

The Sectoral Social Dialogue for Railways gathers for a Steering Committee meeting.

28 September

The European Commission publishes a proposal to recast Regulation 1371/2007 on rail passenger rights (Rail PRR).

3 October

The EU Court of Auditors publishes a special report entitled *A single European rail traffic management system (ERTMS): will the political choice ever become reality?*

24 October

The rail freight corridor Sector Statement Group (SSG) meets in Brussels.

26 October

The RU Dialogue plenary meeting takes place in Brussels.

8-10 November

DG MOVE and the Estonian EU Presidency hold the Digital Transport Days in Tallinn.

15-16 November

CER Executive Director Libor Lochman speaks at the 2017 Control Command and Railway Communication Conference (CCRCC) organised by the EU Agency for Railways.

16 November

The PRIME plenary meets in Brussels.

17 November

CER Executive Director Libor Lochman speaks at the COLPOFER General Assembly in Vienna.

30 November

The CER Human Resources Directors Group meets in Brussels.

1 December

The Rail Sectoral Social Dialogue plenary meeting takes place in Brussels.

5 December

EU Ministers of Transport meet in Brussels.

November

October

December

4-5 October

The third workshop of the CER-ETF Rail Mobile Workers project takes place in Zagreb (focus on Austria, Croatia, Italy, Slovenia).

17-19 October

CER Chair Crister Fritzson visits Brussels for an introductory round of meetings with key EU decision makers including DG MOVE Director-General Henrik Hololei and ERTMS Coordinator Karel Vinck.

18 October

The Customer Liaison Group meets in Brussels.



17-19 October - CER Chair Crister Fritzson in Brussels

23 November

The CER Assistants meet in Brussels.

26 November

CER participates in the first seminar of the European Employers Network, featuring discussions with DG EMPL Director-General Michel Servoz.

27 November

CER takes part in the launch event of the Women in Transport EU Platform for Change, an initiative of DG MOVE and the EESC, and signs the *Declaration on equal opportunities for women and men in the transport sector*.

5-6 December

The fourth workshop of the CER-ETF Rail Mobile Workers project takes place in Lyon (focus on Belgium, France, Germany, Italy, Spain, Switzerland).

7 December

The EU Rail Freight Day takes place in Vienna.

7 December

CER organises a gathering of rail freight CEOs with Transport Commissioner Violeta Bulc in Vienna.

1.4 Communicating and collaborating in 2017

37 publications across 7 key areas

1. Brexit



A CER Statement on Brexit (position paper, October 2017)

2. Environment & Economics



- *High time to implement user-pays and polluter-pays in road charging: CER's proposals for the Eurovignette review* (position paper, November 2017)
- *Electro-Mobility Platform reaction to the EC proposal for a revised 'Eurovignette' Directive on road charging* (joint position paper, October 2017)
- *Road charging / Revising the Eurovignette Directive* (summary sheet, September 2017)
- *Reducing rail freight noise* (fact sheet, May 2017)
- *Platform for Electro-mobility Joint Statement on Road Tolling* (joint position paper, April 2017)

3. Financing



- *More EU budget for transport* (joint brochure, September 2017)
- *Post-2020 Multiannual Financial Framework - Views of the rail sector* (joint position paper, September 2017)

4. Regulation



- *CER position on the Economic Equilibrium Test* (position paper, November 2017)
- *CER position on the Proposal for a Regulation of the European Parliament and of the Council setting out the conditions and procedure by which the Commission may request undertakings and associations of undertakings to provide information in relation to the internal market and related areas* (position paper, November 2017)
- *CER Answer to the Public Consultation Implementation of the Recast - 'Conditions of access to services' - Article 13 Recast Directive 2012/34/EU* (position paper, August 2017)
- *Public service rail transport in the European Union: an overview* (report, July 2017)
- *CER Fourth Position Paper Implementation of the Recast - 'Conditions of access to services' - Article 13 Recast Directive 2012/34/EU* (position paper, May 2017)
- *CER Third Position Paper Implementation of the Recast - 'Conditions of access to services' - Article 13 Recast Directive 2012/34/EU* (position paper, February 2017)

5. Social affairs



- *Working conditions of rail mobile workers in international services* (fact sheet, November 2017)
- *Joint Statement on the European Pillar of Social Rights* (joint statement, November 2017)
- *Joint Statement on the European Pillar of Social Rights* (joint statement, January 2017)

6. Technical affairs & digitalisation



- *GRB Guide to the 4th Railway Package Technical Pillar* (joint FAQ, November 2017)
- *Joint Rail Sector Declaration on Digitalisation of Railways* (joint position paper, November 2017)
- *The use of SAIT in the framework of JNS* (position paper, October 2017)
- *CER acknowledges formal methods and process proposed by EULYNX as good practice* (position paper, October 2017)
- *CER position on the practical arrangement on ERTMS track side approval* (position paper, October 2017)
- *GRB position on ERA System Report 2016* (joint position paper, October 2017)
- CER/UNIFE/UIP/EPPTOLA/FEDECRAIL/ERFA/NB-Rail letter on vehicle authorisation (joint letter, September 2017)
- CER/UNIFE/UIP/EPPTOLA/FEDECRAIL/ERFA/NB-Rail letter on TSI Loc&PAS and TSI WAG (joint letter, September 2017)
- CER/UNIFE/UIP/EPPTOLA/FEDECRAIL/ERFA/NB-Rail letter on fees and charges (joint letter, September 2017)
- CER/EIM/UNIFE/EPTTOLA/FEDECRAIL/UIRR RINF 'Vision Paper' - *Recommendations for the RINF stabilisation and development* (joint position paper, August 2017)
- *Radio spectrum for rail* (fact sheet, June 2017)
- *Introducing Human Factor into the CSMs* (joint position paper, June 2017)
- *With spectrum, boosting a single European Digital Railway Area* (joint position paper, May 2017)
- *COR - Safety Management Data* (joint position paper, May 2017)
- *GRB position on the "transition regime"* (joint position paper, May 2017)
- *European Data Economy* (position paper, April 2017)
- GRB letter to the EC on the Fourth Railway Package Technical Pillar – vehicle authorisation (joint letter, April 2017)
- *GRB Comments on the draft IA "Fees and charges"* (joint position paper, March 2017)
- *GRB Position paper on the EC Expert Group on the Technical Pillar of the 4th Railway Package topics* (joint position paper, March 2017)
- *European Electronic Communications Code (Recast)* (joint position paper, February 2017)

7. Who we are



- CER Annual Report (report, January 2017)
- CER - *The Voice of European Railways* (brochure, January 2017)

Website – www.cer.be

29 658 users
120 894 page views

Twitter - [@CER_railways](https://twitter.com/CER_railways)

1865 followers

LinkedIn – CER

2 058 followers

Tweet of the year



1.5 Ten years of the European Railway Award

A special edition of the European Railway Award was held on 7 February 2017, marking the event's 10th anniversary. High-level policymakers, transport stakeholders and rail sector representatives from across Europe flocked to Brussels to help celebrate the momentous occasion.

The European Railway Award, co-organised by CER and UNIFE (the Association of the European Rail Industry), honours outstanding political and technical achievements in the development of economically and environmentally sustainable rail transport. 18 laureates have been recognised since the launch of the event in 2007. In total, 65 jury members helped select them and over 4000 guests turned out to see them accept their award and donate 130,000 euros in prize money to charity.

For the 10th Anniversary, instead of presenting new awards, the organising associations paid tribute to all who contributed over the years to making the event what it is today: a proud demonstration that all players in the European railway sector – from infrastructure managers, rail operators and suppliers, to their partners in governments and the European institutions – are speaking with one voice when it comes to creating an efficient, competitive, customer-focussed and sustainable railway network.

This message was echoed by the evening's political speakers, European Commission

Vice-President for Energy Union Maroš Šefčovič, Chair of the EP Committee on Transport and Tourism Karima Delli (Greens/EFA, DE), and Maltese Minister of Transport Joe Mizzi, representing the Maltese Presidency of the EU.

They expressed their support for rail and alluded to the sector's great value for Europe with Vice-President Šefčovič calling rail "a very important transport mode"; Mrs Delli saying: "Train is a 'win-win-win': it provides social, environmental and economic benefits."; and Minister Mizzi stating that "heavy rail transport is one of the most environmentally sustainable modes for carrying bulky freight."

The ceremony included a short political review of the past ten years before renowned futurist Gerd Leonhard turned the guests' attention to the future with a thought-provoking analysis of present-day technological developments and where they will lead. The evening concluded with the CER-UNIFE Annual Reception.

The European Railway Award is returning as of 2018 for another inspiring 10 years.



From left to right: CER Executive Director Libor Lochman, UNIFE Chairman Laurent Troger, European Commission Vice-President for Energy Union Maroš Šefčovič, Chair of the EP Committee on Transport and Tourism Karima Delli, UNIFE Director-General Philippe Citroën, Maltese Minister of Transport Joe Mizzi, EU Agency for Railways Executive Director Josef Doppelbauer, Technical Award Winner 2016 Eric Fontanel, former UNIFE Director-General Michael Clausecker, former CER Executive Director Johannes Ludewig, Technical Award Winner 2010 Roland Heinisch, Technical Award Winner 2011 Stefan Haas, Political Award Winner 2012 Karel Vinck, futurist keynote speaker Gerd Leonhard



From left to right: CER Executive Director Libor Lochman, European Commission Vice-President for Energy Union Maroš Šefčovič, Chair of the EP Committee on Transport and Tourism Karima Delli, Maltese Minister of Transport Joe Mizzi, UNIFE Director-General Philippe Citroën



Chair of the EP Committee on Transport and Tourism Karima Delli



European Commission Vice-President for Energy Union Maroš Šefčovič

For more information visit
www.europeanrailwayaward.eu

The winners from the first 10 years

The European Railway Award was initiated by CER in 2007. It is now organised jointly with the Association of the European Rail Industry (UNIFE).

2007



Karel van Miert,
Former European
Transport
Commissioner,
Political Award
Winner



Jean Dupuy,
Former Director-
General of SNCF,
Technical Award
Winner

2010



Felipe González,
Former Spanish Prime
Minister, Political
Award Winner



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

2012



Karel Vinck,
European ERTMS
Coordinator, Political
Award Winner



François Lacôte,
Senior Vice-President
and Technical Advisor
Alstom, Technical
Award Winner

2009



Moritz Leuenberger,
Former Swiss
Transport Minister,
Political Award
Winner



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

2011



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



Stefan Haas,
Managing Director
Knorr Bremse Austria,
Technical Award
Winner

2013



Benedikt Weibel,
Former CEO of the
Swiss Federal Railways
(SBB), Political Award
Winner



Johannes Nicolin,
Technical Director, AAE
Holding AG, Technical
Award Winner

2014



Jacques Barrot,
Former European
Commissioner for
Transport, Political
Award Winner



Giorgio Diana,
Researcher and
Professor of Mechanical
Engineering at
Politecnico di Milano,
Technical Award Winner

2015



Lord Andrew Adonis,
Former UK Secretary
of State for Transport,
Political Award Winner



**Alexander
Neumeister**,
Industrial designer,
Technical Award
Winner

2016



Isabelle Durant,
Former Vice-President
of the European
Parliament, Political
Award Winner



Eric Fontanel,
Railway engineer,
Technical Award
Winner

2

Market trends



2.1 Rail sector stagnation gives way to growth in first half of 2017



European rail passenger operators achieved moderate growth of 1.2% in 2016, while the European rail freight market shrank by 0.1%¹.



The situation improved in the first half of 2017, with growth of 4.1% for European rail passenger operators and 4.4% for European freight operators.

No growth in the European rail freight market

In 2016, the rail freight sector was not able to make up for the losses of the previous year. The results for 2016 show that rail tonne-kilometres in Europe declined by 0.1%. As can be seen in Figure 1, the performance of the European rail freight sector was less strong in 2016 than the rate of growth of industrial production², which grew by 1.6% over the same period. Overall, the European rail freight market in 2016 remained 8.5% below the pre-crisis level of 2007.

As reflected in Figure 2, the rail tonne-kilometres in the EU-13 declined by 1.8% in 2016. This resulted from a sharp drop of 4.5% in the first half of 2016 followed by moderate growth of 0.8% in the second half.

By contrast, rail freight operators in the EU-15 were able to achieve moderate growth of 0.7% in 2016, which was more pronounced in the first half of 2016 (+1.4%) compared to the second half (+0.1%).

Moderate growth in the European rail passenger market

The rail passenger sector in Europe was able to maintain its moderate growth in 2016. Compared to 2015, where passenger-kilometres increased by 1.8%, rail passenger operators in Europe grew by 1.2% in 2016. During the same period, the unemployment rate³ for the EU-28 decreased by 8.5%, from 9.4% in 2015 to 8.6% in 2016.

Rail passenger operators in the EU-13 were able to maintain positive growth in 2016 for a second year in a row, after six years of

gradual annual decline since 2008. As can be seen in Figure 4, rail passenger-kilometres in the EU-13 grew by 3.5% in 2016. This progress was slightly more pronounced in the second half of 2016 (+3.9%) compared to the first half (+3.0%). With an increase in passenger-kilometres of 0.9% in 2016, the EU-15 rail passenger market continued its slow progression of the previous years. This growth was spread evenly between the first and second half of 2016 (+0.9%).

European rail market experiences a positive first half of 2017

Despite the modest developments in 2016, the rail market was able to perform positively in the first half of 2017. During this period, European rail freight operators increased tonne-kilometres by 4.4% compared to the first half of 2016. This

growth was more pronounced in the EU-13, where the rail freight market grew by 10.0%, while in the EU-15, the growth reached 1.8%. Likewise, European rail passenger operators increased passenger-kilometres by 4.1% in the first half of 2017. Also here the growth was more pronounced in the EU-13, where the rail passenger market grew by 8.8% compared to 3.6% in the EU-15.

¹ Data based in Eurostat quarterly statistics for EU-28

² Industry Production Index (which includes mining and quarrying, manufacturing, electricity, gas, steam and air conditioning supply), Eurostat, December 2017

³ Unemployment rate, Eurostat, December 2017

Rail freight development in Europe

Figure 1: Annual rail freight growth (million tonne-km) in Europe compared to rate of growth of industrial production

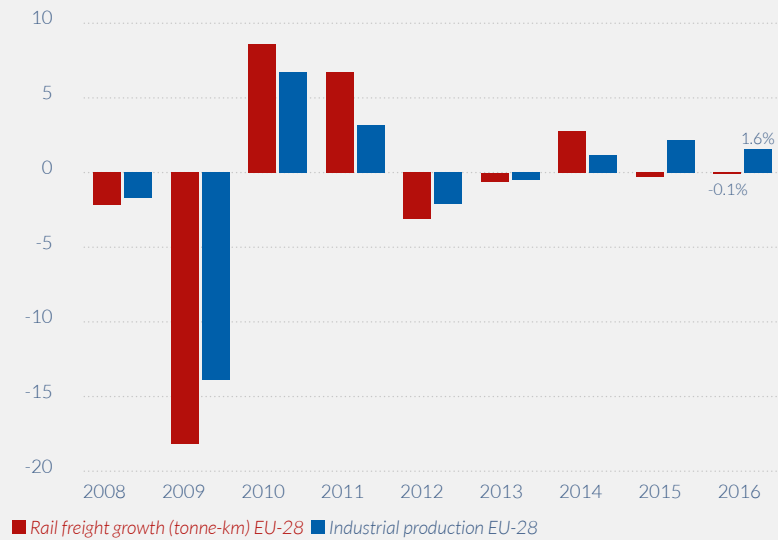


Figure 2: Annual rail freight development in Europe (million tonne-km)

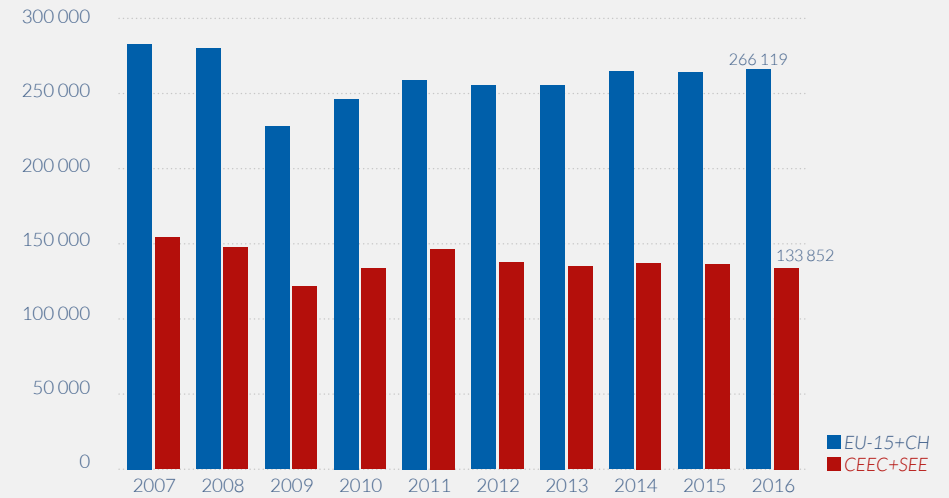
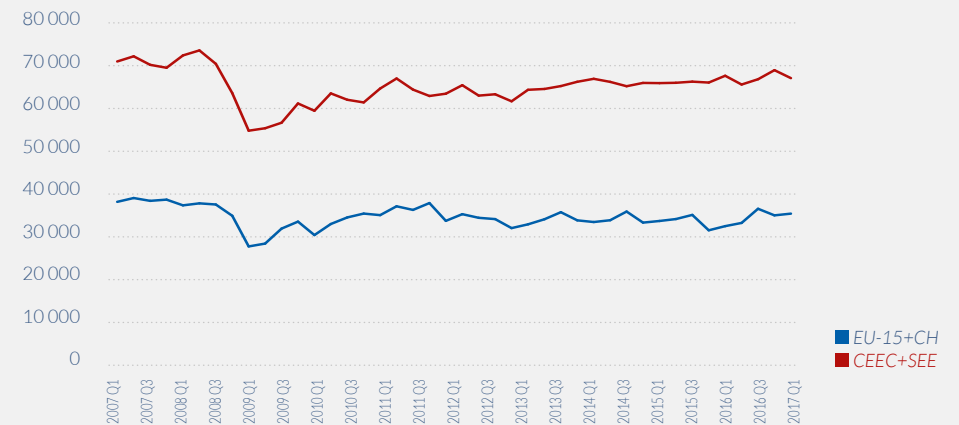


Figure 3: Quarterly rail freight development in Europe (million tonne-km)



Rail passenger development in Europe

Figure 4: Annual rail passenger development in Europe (million passenger-km)

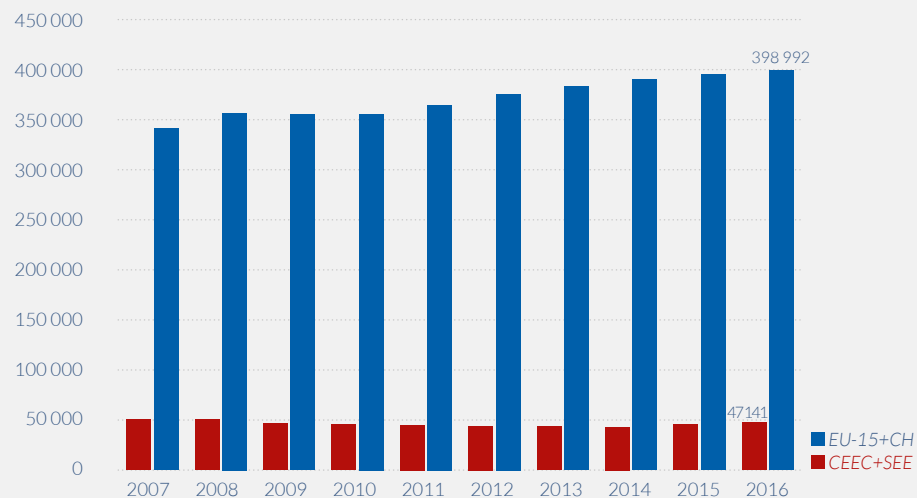
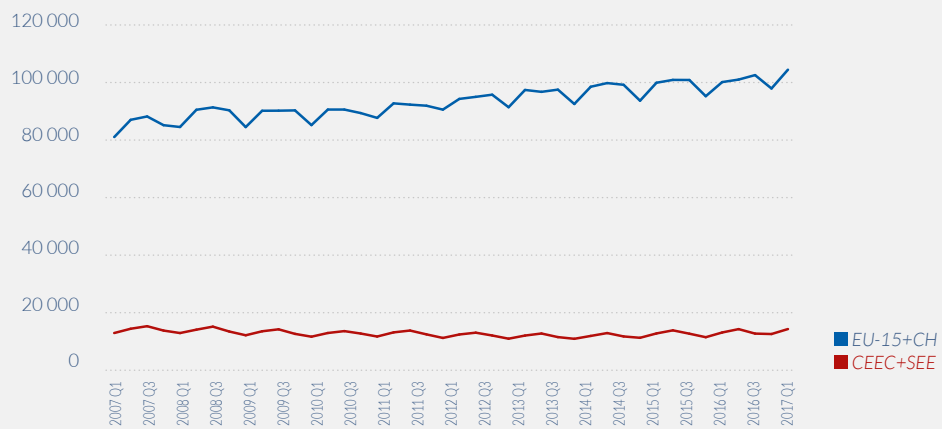


Figure 5: Quarterly rail passenger development in Europe (million passenger-km)



3

In the spotlight



3.1 A leading voice in the mobility debate



CER is recognised as a key player in the EU transport landscape.



Expertise and open stakeholder dialogue characterise CER's actions.

The EU regulatory and legislative framework is a complex one, and it has to ensure **regulatory stability** while being **responsive to market and technological developments**.

In this context, **CER has a key role to play in the EU institutional landscape**, as a communicator of sector priorities and concerns, facilitator of exchange between diverse stakeholders, and conveyor of the technical and market expertise of its members.

In the framework of the **EU decision-making process**, the main interfaces for CER are the European Commission, the EU Agency for Railways, the European Parliament, and the Brussels-based delegations of national governments.

Enlarging the horizon beyond the pure institutional zone, one should not forget the wide and dense network of **sectoral associations**, representing other actors

within the railway galaxy and with which CER coordinates positions and builds alliances based on shared interests and common goals. Those partner organisations represent passenger associations and customers of rail freight services, employees, service providers, and other modes of transport that become relevant when interfaces among transport modes or cross-cutting policy issues are at stake (see also page 8).

As part of CER's long-term business priorities, the railway operating community is active on a number of fronts to drive the agenda for tomorrow's railways:

- the technical and operational **realisation of a safe, efficient and well-functioning EU-wide railway network**;
- the promotion and integration of market and digital solutions to **improve the customers' experience** of rail services;
- the creation of the necessary conditions



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for the all-important achievement of **fair competition among transport modes**, which is influenced by external factors subject to regulation, such as infrastructure

charging, taxation and energy pricing, as well as broader environmental and security policies.

The above strategy was reflected in CER's priority actions in 2017:

Protecting our passengers' rights

The EU institutions are currently discussing the recast of Regulation 1371/2007 on rail passenger rights. CER considers the protection of their customers first and foremost as the sector's own long-standing commitment. For this reason, CER is working closely with the EU institutions and the customers' associations, in order to ensure that the new text enables rail operators to keep up the good work in this area, to the satisfaction of rail passengers, without jeopardising the sector's competitiveness with other modes.

Accessibility – keeping it simple

The rail sector has been on a clear path for many years now to make rail services increasingly accessible for all users. The ongoing revision of the PRM TSI Regulation (1300/2014) and the proposed European Accessibility Act (EAA) are therefore key priorities for CER. The main concern is to avoid double or conflicting EU provisions on the same topic, which could adversely affect the ongoing plans and investments dedicated to improving the accessibility of railway services.

A watchful eye on security

When looking at security in the rail sector, decision makers have had to extend their focus to the ongoing terrorism threat, alongside other issues including metal theft, graffiti, anti-social behaviour, etc. CER is

firmly engaged with the EU and Member States, as well as with key stakeholders such as police forces and passengers, in order to address these topics and find the right solutions to mitigate the security threats. CER acknowledges the importance of improving security while maintaining the open rail transport system. A common approach at EU level is needed where clear added value for the security of transport as a whole can be demonstrated to address today's security threats. In this context, CER is a regular attendant at the Commission's Expert Group on Land Transport Security (LANDSEC).

Committing to low-emission mobility

The European Strategy for Low-Emission Mobility published by the European Commission in 2016 is a comprehensive transport-related strategy. Its intention is to steer the EU regulatory framework towards an accelerated pace of greenhouse gas (GHG) emission reductions in the transport sector. In 2017, the European Parliament worked out its position on the strategy. CER used the opportunity to reiterate the necessity of fixing a binding target for the reduction of transport-specific GHG emissions.

Balancing out the EU Emissions Trading System (ETS)

Electrification of transport offers a unique opportunity to decarbonise transport and help decrease Europe's dependence on imported oil. 55% of railway lines in Europe are already electrified and these lines carry 80% of rail traffic. To encourage further



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electrification in the sector, fair regulatory framework conditions must be defined for all transport modes. In the context of reforming the EU ETS Directive, this means setting a balanced carbon pricing across transport modes. Until then, the rail sector is asking for the playing field to be levelled by using ETS revenues to further develop energy-efficient electric transport modes such as railways.

High hopes for energy efficiency

Improving energy efficiency will reduce Europe's dependence on energy imports and cut emissions. In 2017, the EU began a revision of its legislation on energy efficiency. In order to achieve ambitious and effective long-term energy savings, CER is recommending that the energy used in transport should be included in the economy-wide target for 2021 to 2030.

Making noise about noise

Tackling rolling noise, the last major environmental challenge for the European

rail sector, remained a top priority item for CER in 2017. CER advocates a pragmatic European approach to rail freight noise abatement and organised a high-level conference in May to discuss the optimal general regulatory framework. The key is to enable the successful implementation of rail noise reduction measures without creating any additional administrative or financial burden so as not to compromise the sector's competitiveness. Retrofitting freight wagons with composite brake blocks is the most effective measure in this sense. The sector is committed to the transition to quieter freight wagons, as clearly demonstrated by the oversubscription to the 2016 call for proposals under the Connecting Europe Facility (CEF). CER therefore continues to lobby for adequate funding in order to maintain the intermodal competitiveness of the railway sector. CER is also contributing to the work conducted by the EU Agency for Railways in the framework of the revision of the technical specifications for freight wagons (TSI Noise).

3.2 Implementing the technical part of the Fourth Railway Package



The Fourth Railway Package Technical Pillar introduces major changes to the rail world.



It brings a new approach to safety and authorisation – simpler, more transparent and cheaper.

For decades, running trains, shipping passengers and goods across the European continent has been **hampered by national borders and national 'peculiarities'**. Country by country, different technical systems were developed and installed, and different administrative processes and approaches executed. While the international aviation sector fully relies on and benefits from a harmonised approach in terms of safety, operations, infrastructure and aircrafts, the European railway sector is marked by conspicuous and expensive diversity – although attempts have been made to define a common framework for safety and interoperability.

Bringing it all together

The **original intention of the Fourth Railway Package's Technical Pillar**, published by the European Commission in January 2013, was therefore to unify the varying national approaches and build on the efforts to

shape a common framework in the field of safety and interoperability. The European Commission, the European Union Agency for Railways, the EU Member States and CER together with the other rail sector representatives have made continuous efforts to shape the package and find a **good balance** reflecting the **railway business' needs**. Occasionally, too much insisting on national peculiarities has resulted in rather complicated approaches, however **radical simplification** remains the leitmotif of the Technical Pillar.

A one-stop-shop for cheaper, faster, simpler processes

The **transformation of the European Union Agency for Railways** from an agency drafting technical regulation to an operational European railway authority has been a definite milestone in the creation of a single European railway area. It will now be part of the Agency's duties to grant safety



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certificates (proof that safety requirements are met by railway undertakings) and vehicle authorisation (proof that interoperability requirements are met by the train manufacturers). Prior to this, the processes of certification and authorisation were purely national and thus receiving the permission to operate trains across European borders was a lengthy procedure representing a huge and expensive administrative burden. By **harmonising the administrative processes**, linking all responsible authorities (i.e. the national safety authorities and the European authority) into a network and establishing the European Union Agency for Railways as a **one-stop-shop** and final decision-making body, it should make the **processes leaner, simpler, more transparent and in the end less expensive**.

The legally required **safety certification**, in particular the certification allowing railway companies to **operate in several European countries**, will thus be faster in future. The only critical issue remaining is the transition period between the current regulatory provisions and the new legislation (Fourth Railway Package). That transition, changing from the old to the new regime, will most probably not flow smoothly and cause some ambiguity for all actors involved.

Although the process for **vehicle authorisation** seems more complex and difficult than before, with a need to still thoroughly shape it, the **great opportunity** remains, within the new legal framework, **to significantly reduce the time span** between the building of a new vehicle by a manufacturer and its use by a railway undertaking.

Keeping on top of ERTMS and digitalisation

For the first time, a **single entity in Europe** will have centralised oversight of the **European Rail Traffic Management System (ERTMS) implementation**. With so many mutually incompatible national dialects of this system across Europe, making the European Union Agency for Railways responsible for future ERTMS trackside approval was long overdue.

The Fourth Railway Package will also **lead to a structured and centralised use of railway data**, contributing to **system digitalisation**. New registers to govern the data on infrastructure settings, railway vehicles, and technical rules have been set up and are constantly being improved. These databases are no longer stand-alone tools but will be fully integrated in the process of authorisation, train operation and supervision of railway activities.

A promising opportunity

The Fourth Railway Package's Technical Pillar might not be the revolution of the European railway system that some were expecting. CER and its respective support groups have been working hard in order to ensure that finally the needs of the railway operating community are comprehensively taken into account in the package's legal acts.

All that glitters is not gold, but where the technical pillar does shine is in the huge leap forward it makes towards **shaping a real Single European Railway**



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Area, contributing to its digitalisation, and **facilitating more international train services with more passengers and goods**. Transforming, and to a certain extent overcoming, well-established national approaches to a **European way of working**

and thinking is easier said than done. This railway package offers the opportunity for evolution in many fields and for many actors – thus a promising opportunity to keep up the European railway sector's competitiveness and to progress.

3.3 Promoting fair infrastructure charging in transport



Infrastructure charging in road and rail: European railways need fair framework conditions to thrive.



CER calls for distance-based charging on roads, supporting the user-pays and polluter-pays principles.

What is necessary to achieve **fair competition between rail and road**? How can road charging contribute to this objective? And what would decent working conditions for truck drivers look like? The European Commission's long-awaited *Europe on the Move* package of road sector proposals, published on 31 May 2017, attempts to give answers.

The package notably includes a revision of the so-called **Eurovignette Directive** on road charging, of rules for transport within foreign EU countries (cabotage) and of rest times for drivers. A second package was published on 8 November 2017, proposing new rules for rail-road combined transport and for further liberalisation of coach and bus markets.

The rail sector supports the Eurovignette proposals' good elements and asks for improvements on others, for the sake of fair framework conditions for railways in Europe.

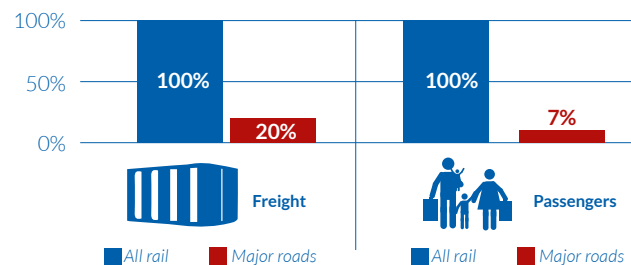
Infrastructure charging in rail and road – the situation today

Railways in Europe are suffering from an uneven playing field. They pay distance-based charges everywhere for any train (100% tolling by EU law), covering at least the **direct cost of infrastructure** use, plus often a mark-up. By contrast, even for major roads, charges (vignettes or tolls) are currently only applied to trucks on about 20-25% of the network in Europe. Even less for passenger transport. So competition is not fair between road and rail.



© VR, Janne Mikkilä

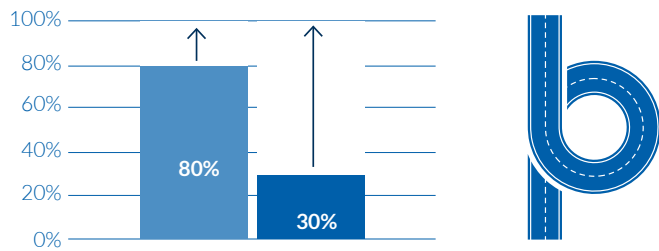
Distance-based infrastructure charging rail versus road



Source: European Commission, CER



Road freight's coverage of external costs (incl. infrastructure)



Source: CE Delft (2016-17) ■ EU motorways only ■ All EU roads

Moreover, on EU average, trucks pay only around 30% of their total infrastructure and external costs. Even on EU motorways alone, cost coverage is only around 70-90%.

Communicating the rail sector's position

The 2016 groundwork laid in anticipation of the 'Road Package' through a first position paper, CER responses to public consultations, discussions with Commission officials and a compilation of relevant facts, all helped to shape CER's statements in 2017.

Fair competition between road and rail requires mandatory **distance-based road charging** across the EU. This in turn would encourage a modal shift to rail, benefitting citizens and the environment and helping achieve major EU climate objectives.

CER also adopted a clear position vis-à-vis the **Eurovignette Directive revision**. **Some elements are welcome**, e.g. to phase out time-based charges and to facilitate external-cost charging. **For other elements, CER is calling for greater ambition**, referring to the polluter-pays principle of the EU Treaty (art. 191.2) and the Transport White Paper objective of full and mandatory internalisation of external costs, including wear and tear, by 2020.

Specifically, CER is calling for mandatory distance-based charging on all major roads, more consistent external-cost charging, earmarking of available external-cost charging revenue to develop cleaner transport modes and – crucially – direct-cost coverage (user-pays) for all types of vehicles on roads including zero-emission ones.

Looking at the other pillar of the *Europe on the Move* package – **working conditions** – this is also a regulated area that shapes intermodal competition, and **enforcement** is a key aspect. In order to draw the attention of policymakers to the intermodal relevance of road sector rules, CER produced a fact sheet outlining the quality working conditions applicable to international rail mobile workers.

CER joining forces with other associations

To maximise its lobbying impact, CER has been **joining forces with other associations, also from the road sector**. Together with the European Association of Operators of Toll Road Infrastructure (ASECAP) and the European Road Federation (ERF), CER organised a public event on 27 September to highlight issues in infrastructure charging in land transport. Gathering high-level speakers from both transport associations and the EU institutions, the debate demonstrated overwhelming support for applying user-pays and polluter-pays principles in transport.

Within the European Platform for Electro-Mobility, an informal group of around 30 associations from the energy and transport sectors, CER coordinated a subgroup that developed two joint position papers on the Eurovignette review.

Throughout 2018, CER will seek to further strengthen such ties, while continuing to reach out to the EU institutions, to call upon policymakers to adopt rules for fair infrastructure charging.

3.4 E-ticketing in rail – a plug & play approach



The rail sector is keen to embrace technological and societal changes in order to meet the needs and expectations of its passengers.



The past years have been marked by a shift towards electronic and virtual tickets and increasingly personalised offers, and this is set to continue.



The Full Service Model initiative is set to become the cornerstone of modern rail distribution.

E-ticketing develops at high speed

The move **towards electronic ticketing systems** is one of the biggest revolutions in rail transport today and the change of pace is unprecedented. The use of computer reservation systems allows for ticketless travel as well as technologies based on chip-cards, smart cards, smartphones and Near Field Communication (NFC). Ticketing options have considerably increased for customers, making rail journeys more seamless than ever. Today, the **majority of all rail tickets in Europe are sold via the internet**, either on railway companies' own websites or via third-party ticket vendors. However rail is a transport mode for all, from the most technology-savvy to the least connected. Therefore, paper-based tickets are still available to all those for whom access

to modern technologies remains a challenge and those to whom holding a paper document brings comfort and reassurance.

Multi-carrier offers are multiplying

The offer of multicarrier journeys and cross-border journeys is expanding as rail operators are multiplying connections among themselves and with specialised ticket vendors. The offer of such products is set to increase tremendously in the coming months and years.

At the beginning of 2017, a group of leading railway operators together with major ticket vendors operating in Europe published a **set of technical specifications that will facilitate the exchange of ticketing data**.



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The new specifications, known under the acronym **FSM (Full Service Model)**, allow railways and ticket vendors to better sell rail products and to combine them into end-to-end transport solutions for their customers. FSM is the result of a long collaboration between railways and ticket vendors.

One plug fits all

With the FSM technical specifications, there is no longer any need to develop specific bilateral connections between operators

who wish to sell each other's products or to combine them. The **FSM specifications offer one uniform interface to connect all interested railways and ticket vendors**, subject to commercial agreements. It's like a universal plug adapter for ticketing.

FSM users are able **to reduce their costs** as they do not have to adapt their IT systems each time they want to connect with a new commercial partner. But using the universal FSM plug rather than a dedicated plug for each connection

also benefits the whole distribution chain, including the end-customer who will be able to acquire a through-journey. The ultimate winner therefore is the passenger, who will be able to choose from a wider range of origin-destinations whether buying tickets at the station or on the internet. FSM also contributes to the offer of door-to-door mobility solutions.

FSM specifications are there to be used

There is of course no obligation. Each company is free to use whichever method they choose to connect to their distribution partners. Sometimes, using a legacy system which has worked for years may remain adequate and cost-effective. But the FSM specifications have been developed to adapt to the digital age with all the flexibility and ease of data processing that this implies. The specifications are available to download free of charge at www.tsga.eu/fsm. Just in the first months following their publication, they were downloaded more than 100 times by a wide range of users in Europe and beyond.

An increasing number of CER members is already adopting them. Ticket vendors are also realising what great potential FSM offers. Ticket retailers are able to bring together information from a great number of international rail carriers for use by large companies, travel management companies, online booking tools and travel agencies.

CER encourages all railways and all ticket vendors to download and apply the FSM specifications, especially when contracting with new commercial partners.

Towards multimodal door-to-door ticketing

Beyond rail ticketing, **CER members see the future as 'door-to-door' and 'multimodal'**. Each year, they increase their partnerships with bus operators, air carriers, car-sharing services, taxi companies, public transport providers and other platforms to bring customers exactly where they wish to go. This involves sharing and accessing travel data, an area where the European Commission Delegated Act on Multi-Modal Travel Information Services (MMTIS) is to pave the way. The CER Travel Experience Working Group actively engaged with the European Commission's Intelligent Transport System (ITS) Unit to make sure that terms and conditions to access travel data are defined in the relevant license agreement of the data provider, so as to protect data owners from any misuse of their data. The MMTIS Delegated Act was adopted on 21 October 2017, providing the legal certainty required for multimodal travel information to expand for the benefit of all travellers.

3.5 Boosting international rail freight



The rail sector is committed to improving the quality, reliability and efficiency of transporting goods by rail across Europe.



Work has started on 10 priority actions deriving from the railway Sector Statement on boosting international rail freight.



Time matters, not only the European Commission is expecting results quickly.

The European rail sector and Member States are pulling together with a common goal in mind: **boosting international rail freight** for the benefit of the whole sector, including shippers and other end-users.

The **rail sector and its customers** (represented by CER and nine other Brussels-based rail-related associations), supported by the nine Rail Freight Corridors (RFCs), have signed a **Sector Statement**, committing themselves to **improving the quality, reliability and efficiency of transporting goods by rail across Europe**. It identifies important measures needed to boost international rail freight, many of which are infrastructure related. The Sector

Statement was presented together with a **Ministerial Declaration on boosting international rail freight** launched by the EU's transport ministers during the TEN-T Days in Rotterdam in June 2016.

This was an unprecedented step towards **increasing the competitiveness** of international rail freight, unlocking its **growth potential**, and promoting rail's key role in a **sustainable transport system**.

A Sector Statement Group to implement the Ten Priority Actions

The involved sector stakeholders identified the **ten priority actions** (listed below) requiring the most urgent attention, and presented them at the Rail Freight Day in December 2016.



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10 Priority Actions derived from the Sector Statement

1. Following the TimeTable Redesign project (TTR)
2. New concepts for capacity offer on RFCs
3. Improving coordination on Temporary Capacity Restraints (TCR)
4. Enhancing the use of Path Coordination System (PCS)
5. Improving harmonisation of processes at borders
6. Train tracking and Expected Time of Arrival (ETA)
7. Prioritisation, funding instruments, and monitoring of TEN-T parameters
8. Facilitating concrete ERTMS Implementation
9. Monitoring the quality of freight services with implemented and shared KPIs
10. Harmonising the Corridor Information Document (CID)

Consequently the Sector Statement Group was formed in 2017 in order to collect and share information on the implementation of the Sector Statement. The group is supported by a rapporteur for each priority, and a secretary drawn from the participating sector associations. The role of the rapporteurs is to form an aggregated sector view and to report on progress to sector stakeholders as well as to the European Commission and transport ministries.

The Secretary acts as the single point of contact for organisational matters, and is responsible for disseminating information through a dedicated website. The secretariat function is currently held by CER but will change annually on a rotational basis.



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Time to deliver

There is considerable pressure on the sector to **deliver rapid progress** with respect to the ten priority actions. In early 2017, the European Commission decided to postpone the review of Regulation 913/2010 concerning a European rail network for competitive freight by roughly two years in order to allow time **for the sector to develop its own business-oriented solutions**. The first concrete results on the progress of the Sector Statement Group were presented at the Rail Freight Day in Vienna on 7 December 2017.

Despite many challenges, the Sector Statement presents a **unique opportunity** for the sector to improve conditions for rail freight. **Its strength** is derived from the direct support of the numerous participating rail freight companies and infrastructure managers, the Rail Freight Corridors, shippers and their associations. In addition, the sector enjoys the **close cooperation** of transport ministries through the Ministerial Declaration, as well as the support of the European Commission.

3.6 Digitalisation – a reality in rail



The rail sector's objective is to make the most out of the digital transformation in order to offer highly efficient and appealing transport options to its customers.



Reliable and better connectivity will provide safe, efficient and attractive railways both for customers and staff.



The rail sector aims to make the most of the opportunities offered by digital transformation. Its ultimate objective is to offer highly efficient and attractive transport options to its customers. To help achieve this, the sector identified the following priorities, as outlined in the joint Roadmap for Digital Railways (2016):

- enhancing customer experience by offering better and **added value for customers**;
- offering connected railways by providing **reliable connectivity** for safe, efficient and attractive railways;
- boosting rail **competitiveness by making the most of transport data**;
- increasing **capacity by enhancing the reliability, efficiency and overall performance** of railways.

A European Data Economy

At sector level, railways are exploring all opportunities. They're adapting to and integrating in the new digital ecosystem in order to maintain their strong economic position in Europe. Better collaboration, both within the sector and beyond – with other complementary transport modes, manufacturers, suppliers, customers, end-users and other third parties – will bring **added value for customers** making it easier for them to integrate rail into their transport options.

CER, with its paper on the European data economy (Q2-2017), contributed to the main objectives of the Commission's Communication *Building a European Data Economy* in addition to responding to the public consultation on this issue.

In general, CER welcomes the possibilities which data-driven business models, IoT and smart-sensor-equipped machines can provide. CER therefore encourages positive discussion on such opportunities rather than a restrictive view of data usage.

The European Electronic Communications Code

Connectivity is seen as a foundation allowing the full realisation of the European Single Digital Market and the digitalisation of railways. **Reliable and better connectivity** will provide safe, efficient and attractive railways both for customers and staff, ensuring high-quality, high-speed coverage by public telecom operators, including along major transport paths and the trans-European transport network.

CER therefore supports the main objectives of the Commission's Communication *Connectivity for a Competitive Digital Single Market - Towards a European Gigabit Society*, aimed at

delivering high-performance internet connectivity for the Digital Single Market and in particular for digitalised railways. Careful attention was paid to the communication's proposal for a Directive establishing the European Electronic Communications Code (Recast) in a CER position paper.

E-transport documents for freight

There are significant benefits emerging from using electronic documents, i.e. reduced printing costs, less (error-prone) manual data input, fast and easy access to data, and competitive advantages among others.

CER, in collaboration with CIT, UIC and Raildata, contributes to the Commission's Digital Transport & Logistics Forum (DTLF) activities on electronic transport documents for freight. The overall objective of this initiative is to foster the electronic exchange of such documents/data, particularly for multimodal and cross-border transport operations, and enhance rail's **competitiveness by making the most of transport data**.

ERTMS – step-by-step across Europe

More than 50 European working groups contribute to and influence the European Rail Traffic Management System (ERTMS). Coordination among CER members, with sector partners but also with the European Commission and the EU Agency for Railways is therefore essential

in order to reduce the risks and cost involved in ERTMS programs and projects, and finally achieve a deployment that will **enhance network capacity by improving the reliability, efficiency and performance of railways**.

In its special report *A single European rail traffic management system: will the political choice ever become reality?* (October 2017), the EU Court of Auditors found that deployment so far is at a low level and represents a patchwork. Despite the broad acceptance of the ERTMS concept to enhance interoperability, infrastructure managers and railway undertakings are reluctant to take on the significant expense involved. It's an investment that can be hard to justify (for example in the Member States with well-functioning national systems and significant remaining lifespan) and EU funding can only cover a limited amount.

In order to accelerate ERTMS implementation, the Commission published the ERTMS Deployment Action Plan on 6 November 2017. The action plan has been extensively reviewed at CER; its execution will be monitored by the European Commission and the EU Agency for Railways via the ERTMS Stakeholder Platform, involving CEOs from major rail operators and suppliers.

In parallel, work is underway to implement the many ERTMS-related legal texts, such as the European Deployment Plan, the National Implementation Plans, Technical Specifications for Interoperability (TSIs), the Fourth Railway Package, etc. CER is contributing to all European Commission



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and EU Agency for Railways working groups and has also developed a closer cooperation with other European sector organisations involved in ERTMS deployment and development. In-depth investigations were launched on how to improve product testing and validation in order to ensure good performance and compatibility on all kind of ERTMS lines. On top of this a checklist was published to support railway undertakings when procuring ERTMS on-board equipment.

The challenge for the upcoming years is to **define relevant steps that will help ERTMS to be affordable and able to deliver the required performance for the railway system in Europe**. Appropriate financing instruments must also be made available for ERTMS to deliver effective and predictable opportunities for the railway system.

4

CER governance

4.1 CER Management Committee



CER Chair
Crister Fritzson
 Association of Swedish Train Operating Companies (ASTOC)



Vice-Chair
Ilona Dávid
 Magyar Államvasutak (MÁV)



Vice-Chair
Martin Erdössy
 Železnice Slovenskej Republiky (ŽSR)



Vice-Chair
Andreas Matthä
 Österreichische Bundesbahnen (ÖBB)



Vice-Chair
Oliver Wolff
 Verband Deutscher Verkehrsunternehmen (VDV)



Member
Juan Alfaro
 Renfe Operadora (RENFE)



Member
Pavel Krtek
 České dráhy (ČD)



Member
Richard Lutz
 Deutsche Bahn (DB)



Member
Krzysztof Mamiński
 Polskie Koleje Państwowe (PKP)



Member
Renato Mazzoncini
 Ferrovie dello Stato Italiane (FS Italiane)



Member
Andreas Meyer
 Schweizerische Bundesbahnen / Chemins de Fer Fédéraux Suisses / Ferrovie Federali Svizzere (SBB/CFF/FFS)



Member
Geert Pauwels
 Lineas



Member
Guillaume Pepy
 Société Nationale des Chemins de Fer Français (SNCF)



Member
Paul Plummer
 Rail Delivery Group (RDG)



Member
Marc Wengler
 Société Nationale des Chemins de Fer Luxembourgeois (CFL)



Associated Member
Edvins Bērziņš
 Latvijas dzelzceļš (LDz)



Associated Member
Bernard Guillemon
 BLS



Associated Member
Carlos Gomes Nogueira
 Comboios de Portugal (CP)

4.2 How does CER work?

CER is the only organisation in the EU representing the entire European railway system vis-à-vis the EU Institutions. Its diverse membership includes railway undertakings and their national associations, infrastructure companies, path allocating bodies and vehicle leasing companies, including long-established companies, new entrants, and both private and public-sector organisations. CER represents a vast majority of freight and passenger operators in the EU and candidate countries, as well as the majority of rail infrastructure managers.

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

CER General Assembly

The General Assembly is CER's decision-making body. All member organisations take one seat and are represented by their Chief Executive or Director General. The General Assembly takes strategic decisions and gives the CER team guidance on how to advance on specific policy issues.

CER Management Committee

The Management Committee makes recommendations to the General Assembly. It consists of the CER Chair, four Vice-Chairs and further members elected by the General Assembly. The size of the Management Committee is limited to a maximum of 16 members.

CER Assistants

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

Besides the gatherings of these bodies, CER also arranges further meetings and working groups to discuss specific issues. All members affected are invited to take part in these discussions.

High-level meetings

Separate meetings are held at least once a year with chief executives from passenger, freight and infrastructure companies to discuss specific issues affecting their business areas. In the field of social affairs, there are also dedicated meetings of Human Resource Directors.

Working groups

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

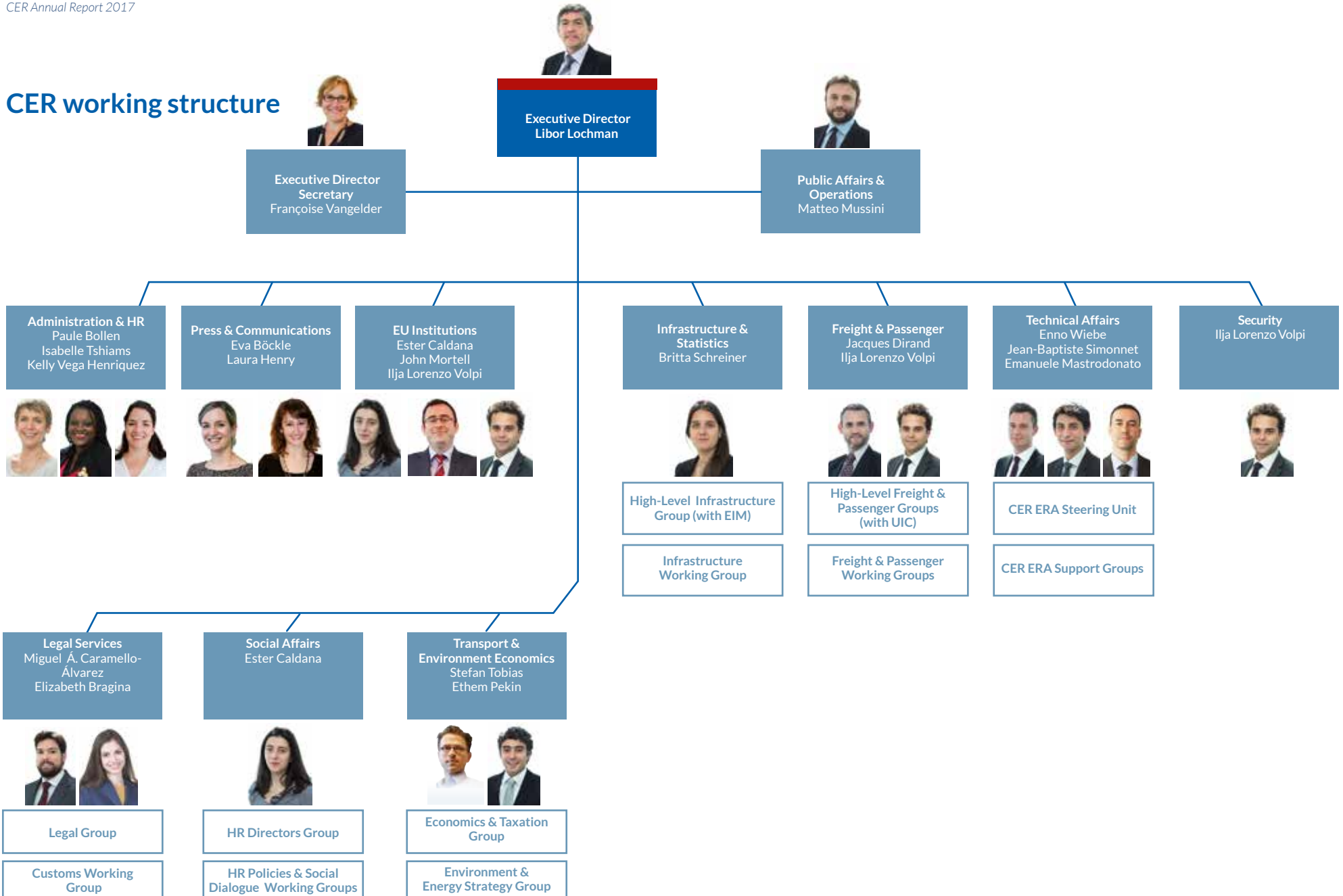
- Brexit Working Group
- Customer Liaison Group
- Customs Working Group
- Economics and Taxation Group
- Environment and Energy Strategy Group
- CER ERA Steering Unit (and various working groups on interoperability and safety)
- Freight Focus Group
- HR Policies Working Group
- Infrastructure Interest Group
- Legal Working Group
- Passenger Working Group
- Security Working Group
- Social Dialogue Working Group
- Travel Experience Working Group

All groups meet on a regular and/or ad hoc basis.

Building bridges

Internally CER follows the principle that opinions of all members are taken into consideration. CER has long-standing experience demonstrating that there is always a way to find compromises among various members' positions when a principle of mutual respect applies. In the same spirit, every member has access to every working group in our association. CER is always open to new members.

CER working structure



4.3 Member statistics 2016

CER Member ^{a,b,c,d,e}	Country	Length of lines in km	Staff number		Passengers carried		Passenger-kilometres		Freight tonnes carried		Freight tonne-kilometres		Train-kilometres (IM only) ^f		Turnover		EBITDA ^g
			FTE ^d	Δ% 15/16	millions	Δ% 15/16	millions	Δ% 15/16	millions	Δ% 15/16	millions	Δ% 15/16	millions	Δ% 15/16	millions €	Δ% 15/16	millions €
ASTOC	SE	-	10 501	1%	221.0	3%	12 800.0	1%	67.5	4%	21 406.0	3%	-	-	n/a	n/a	n/a
BDŽ Holding	BG	-	9 477	-1%	21.4	-5%	1 458.0	-6%	6.2	-25%	1 573.0	-12%	-	-	167.8	-11%	-0.2
BE ⁿ	LV	-	182	3%	-	-	-	-	6.1	205%	2 403.8	n/a	-	-	n/a	n/a	n/a
BLS	CH	520	2 686	-5%	57.8	4%	981.3	5%	10.1	n/a	2 440.0	-7%	13.9	2%	949.4	1%	249.5
BRC	BG	-	351	9%	-	-	-	-	2.6	-3%	791.0	-7%	-	-	19.3	-4%	1.2
BTS ⁿ	LV	-	96	n/a	-	-	-	-	11.7	n/a	3 480.0	n/a	-	-	n/a	n/a	n/a
Bulmarket ^p	BG	-	80	n/a	-	-	-	-	0.5	n/a	123.0	n/a	0.4	n/a	n/a	n/a	n/a
ČD	CZ	-	23 644	5%	171.5	1%	7 380.0	3%	65.5	-1%	11 282.0	2%	-	-	1 231.5	2%	305.0
CFL	LU	275	3 230	1%	22.5	0%	417.3	-1%	-	-	-	-	8.0	-4%	n/a	n/a	n/a
CFL cargo	LU	-	663	3%	-	-	-	-	6.9	0%	1 137.0	-2%	-	-	n/a	n/a	n/a
CFM	MD	1 151	8 459	-8%	2.3	-30%	121.5	-33%	3.5	-17%	793.0	-17%	2.2	-17%	48.6	-13%	1.6
CFR	RO	10 766	23 427	8%	-	-	-	-	-	-	-	-	87.8	1%	239.0	0%	165.2
CFR Călători	RO	-	12 733	0%	53.0	-4%	4 460.0	-3%	-	-	-	-	-	-	412.3	-4%	71.5
CFR Marfă	RO	-	6 250	-1%	-	-	-	-	24.5	-12%	5 017.2	-2%	-	-	151.0	-13%	-27.1
CP	PT	-	2 708	1%	114.8	3%	3 802.8	5%	-	-	-	-	-	-	239.2	-1%	344.0
DB	DE	33 380	306 368	3%	2 365.0	5%	91 651.0	3%	277.4	-8%	94 698.0	-4%	1 068.0	1%	40 576.0	0%	4 797.0
DSB	DK	-	7 285	-2%	192.6	0%	5 884.0	-2%	-	-	-	-	-	-	1 645.1	0%	-228.9
Eurostar	GB (UK)	-	1 679	-1%	10.0	-4%	4 598.1	-4%	-	-	-	-	-	-	1 006.0	-14%	n/a
EVR ^o	EE	794	821	n/a	-	-	-	-	-	-	-	-	6.5	n/a	n/a	n/a	n/a
FS Italiane	IT	16 788	69 056	0%	n/a	n/a	38 416.0	-2%	n/a	n/a	11 903.0	0%	349.7	3%	8 928.0	4%	2 293.0
GFR ⁿ	RO	61.3	2 446	n/a	-	-	-	-	15.5	n/a	3 831.0	n/a	0.01	5%	n/a	n/a	n/a
GR ⁿ	GE	1 576	n/a	n/a	2.4	n/a	465.0	n/a	14.1	n/a	4 261	n/a	6.4	n/a	n/a	n/a	n/a
GySEV	HU/AT	509	1 887	0%	7.1	0%	308.1	3%	6.1	-9%	787.1	3%	7.2	1%	n/a	n/a	n/a
HSH	AL	424 ^q	1 334 ^q	n/a	0.4 ^q	n/a	15.9 ^q	n/a	0.1 ^q	n/a	15.3 ^q	n/a	0.8 ^q	n/a	n/a	n/a	n/a
HUNGRAIL	HU	-	2 ^q	n/a	-	-	-	-	n/a	n/a	0.6 ^q	n/a	-	-	n/a	n/a	n/a
HŽ Cargo	HR	-	1 915	-8%	-	-	-	-	8.5	-14%	1 870.5	-14%	-	-	68.9	-17%	1.9
HŽ Infrastruktura	HR	2 605	4 918	-2%	-	-	-	-	-	-	-	-	20.8	2%	158.3	-10%	10.0
HŽPP	HR	-	1 861	0%	20.7	-5%	836.3	-12%	-	-	-	-	-	-	108.3	-7%	18.1
IÉ	IE	2 400	3 806	0%	42.8	8%	1 990.0	4%	0.6	7%	259.8	5%	18.4	0%	467.7	5%	25.4
ISR ^r	Israel	1 340	3 300	3%	59.5	13%	2 645	1%	9.2	23%	1 404.0	22%	16.0	9%	n/a	n/a	n/a
JR East	Japan	7 458	58 550	-1%	6 218.0	0%	130 068.0	-1%	-	-	-	-	-	-	152.8	11%	n/a
LDZ	LV	1 860	11 782	-4%	0.2	-17%	40.2	-18%	47.8	-14%	11 838.0	-9%	16.5	-1%	388.1	-15%	78.9
LG	LT	1 911	9 916	-3%	4.4	5%	446.0	24%	47.7	-1%	13 790.0	-2%	14.5	2%	407.7	-7%	122.4

CER Member ^{a,b,c,d,e}	Country	Length of lines in km	Staff number		Passengers carried		Passenger-kilometres		Freight tonnes carried		Freight tonne-kilometres		Train-kilometres (IM only) ^f		Turnover		EBITDA ^g
			FTE ^d	Δ% 15/16	millions	Δ% 15/16	millions	Δ% 15/16	millions	Δ% 15/16	millions	Δ% 15/16	millions	Δ% 15/16	millions €	Δ% 15/16	millions €
LINEAS	BE	-	1 847	-1%	-	-	-	-	31.1	6%	5 108.5	4%	-	-	388.3	0%	25.1
MÁV	HU	7 243	35 934	-1%	110.9	2%	5 391.0	1%	-	-	-	-	100.0	-1%	1 408.1	-2%	309.3
Montecargo ⁿ	ME	-	200	-2%	-	-	-	-	n/a	n/a	111.0	n/a	-	-	n/a	n/a	n/a
MŽ Infrastructure ^r	MK	683	1 150	-7%	-	-	-	-	-	-	-	-	2.3 ⁿ	-92%	n/a	n/a	n/a
MŽ Transport	MK	-	1 066	-7%	0.6	-40%	82.9	-53%	1.4	-13%	222.0	-20%	-	-	n/a	n/a	n/a
NRIC	BG	4 029	11 490	-1%	-	-	-	-	-	-	-	-	29.4	-1%	177.4	2%	-16.9
NS ^k	NL	-	19 886	12%	394.6	4%	17 676.3	5%	-	-	-	-	-	-	3 172.0	10%	615.0
NSB	NO	-	10 447	0%	67.6	1%	3 331.0	4%	-	-	-	-	-	-	1 568.4	-1%	159.1
ÖBB ^m	AT	4 865	41 054	1%	460.8	0%	10 159.4	4%	109.0	0%	30 265.8	4%	146.1	0%	5 246.8	0%	1 779.1
OSE	EL	2 240 ^r	1 310 ^r	-6%	-	-	-	-	-	-	-	-	10.8 ⁿ	n/a	n/a	n/a	n/a
PKP	PL	18 429	49 456.0	-26%	38.5	24%	9 466.0	23%	n/a	n/a	26 836.0	-7%	n/a	n/a	540.0	-80%	107.9
Rail Polska ⁿ	PL	28	329	-5%	-	-	-	-	3.1	7%	826.0	-5%	1.2	-9%	n/a	n/a	n/a
RDG	GB (UK)	-	n/a	n/a	1 772.6	3%	68 000.0	2%	-	-	-	-	-	-	n/a	n/a	n/a
Regiotrans	RO	-	672.0	-1%	5.9	-5%	271.9	-7%	-	-	-	-	-	-	38.5	0%	0.8
RENFE Operadora	ES	-	13 955	-2%	471.4	1%	25 291.1	2%	18.2	-13%	6 651.1	-6%	-	-	3 228.2	-1%	466.8
SBB CFF FFS	CH	3 230	33 119	0%	448.7	4%	18 299.7	2%	48.9	8%	8 719.8	7%	183.7	2%	8 244.1	0%	2 218.4
SLB ^q	AT	-	138	n/a	4.7	n/a	58.0	n/a	2.5	n/a	225.0	n/a	-	-	n/a	n/a	n/a
SNCB/NMBS	BE	-	18 178	-6%	230.0	-1%	10 025.4	-3%	-	-	-	-	-	-	2 189.2	-4%	33.4
SNCF	FR	28 364	260 000	0%	1 207.4	2%	83 255.9	-2%	44.1	-12%	18 088.4	-9%	473.3	-6%	32 300.0	3%	4 100.0
SŽ	SI	1 209	7 547	-5%	14.0	-4%	680.1	-4%	16.9	2%	3 962.6	3%	19.8	8%	501.9	-14%	60.6
SŽDC	CZ	9 463	17 325	0%	-	-	-	-	-	-	-	-	163.4	2%	155.6	-2%	62.1
TCDD	TR	10 131.0	22 870	-5%	89.0	-7%	4 325.0	-10%	25.9	0%	11 661.0	11%	42.0	2%	284.2	-5%	-749.6
TFG	RO	-	135 ^q	n/a	-	-	-	-	0.7 ^q	n/a	319.0 ^q	n/a	-	-	n/a	n/a	n/a
Thalys	BE	-	n/a	n/a	6.7	-2%	2 410.0 ^q	n/a	-	-	-	-	-	-	457.4	-6%	n/a
TRAINOSE	EL	-	1 532 ^o	n/a	15.3 ^o	n/a	958.0 ^p	n/a	3.2 ^o	n/a	352.0 ^o	n/a	-	-	n/a	n/a	n/a
Trasse Schweiz ^h	CH	-	10	0%	-	-	-	-	-	-	-	-	197.6	2%	2.0	-7%	-0.021
UZ ⁿ	UA	20 975	293 685	n/a	436.1	n/a	37 577.0	n/a	350.0	n/a	195 054.0	n/a	200.3	n/a	n/a	n/a	n/a
VDV	DE	38 466 ⁿ	145 340 ^o	0%	2 325.0 ⁿ	0%	84 200.0 ⁿ	0%	582.0 ⁿ	-2%	101 200.0 ⁿ	-3%	n/a	n/a	n/a	n/a	n/a
VPE ^j	HU	-	34	0%	-	-	-	-	-	-	-	-	107.2	-1%	2.1	-1%	0.4
VR Group	FI	-	6 124	-1%	82.1 ⁱ	8%	3 868.0 ⁱ	-6%	36.1	8%	9 445.0	12%	-	-	836.9	-5%	158.0
WKO	AT	475	n/a	n/a	23.0	0%	180.0	0%	3.0	0%	390.0	0%	-	-	n/a	n/a	n/a
ŽFBH	BA	601	3 408	-4%	0.3	0%	12.9	-39%	8.9	1%	768.2	-10%	2.5	3%	54.6	-6%	3.2
ŽICG	ME	249 ^q	812 ^q	n/a	-	-	-	-	-	-	-	-	0.6 ^q	n/a	n/a	n/a	n/a

CER Member ^{a,b,c,d,e}	Country	Length of lines	Staff number		Passengers carried		Passenger-kilometres		Freight tonnes carried		Freight tonne-kilometres		Train-kilometres (IM only) ^f		Turnover		EBITDA ^g
		in km	FTE ^d	Δ% 15/16	millions	Δ% 15/16	millions	Δ% 15/16	millions	Δ% 15/16	millions	Δ% 15/16	millions	Δ% 15/16	millions €	Δ% 15/16	millions €
ŽRS	BA	417	3 082	-3%	0.2	-11%	11.2	-10%	4.4	-11%	371.0	-17%	1.5	-11%	32.9	-10%	-0.1
ŽS Infrastructure ^l	RS	3 738	7 965	n/a	-	-	-	-	-	-	-	-	16.2	n/a	109.5	n/a	n/a
ŽS Passenger	RS	-	2 455	-15%	6.1	-3%	438.0	-14%	-	-	-	-	-	-	n/a	n/a	n/a
ŽSR	SK	3 626	13 929	-1%	-	-	-	-	-	-	-	-	49.7	1%	452.4	-1%	193.1
ŽSSK	SK	-	5 967	0%	65.6	18%	3 193.7	4%	-	-	-	-	-	-	278.9	0%	-5.2
ŽSSK Cargo	SK	-	5 794	-4%	-	-	-	-	35.6	3%	7 071.6	3%	-	-	278.0	-2%	30.7

- Not applicable

n/a Not available

a MRCE (NL), a rolling stock leasing company, is a partner member of CER. Since it not a rail company it cannot be listed in the table.

b Eurail (NL), a general sales organisation for Rail Passes, is a member of CER. Since it is not a railway company it cannot be listed in the table.

c High Speed 2 (HS2) (UK) is a member of CER but is not listed in the table since operations have not yet begun.

d RB Rail AS is a partner member of CER. Established as a joint venture, RB Rail AS acts as the main coordinator of the Rail Baltica project, a rail infrastructure project linking the Baltic States to the European rail network with a standard gauge rail line. Since it is not a railway company it cannot be listed in the table.

e ŽS (Serbian Railways JSC) is a member of CER. The company was created on 10 August 2015 along with three other joint stock companies. ŽS is not listed in the table because it does not operate rail traffic or manage rail infrastructure. ŽS provides engineering and technical consulting, as well as information technology services, carries out accounting and bookkeeping activities, and manages real estate.

f Train-path kilometres from the point of view of the infrastructure manager.

g Earnings Before Interest, Taxes, Depreciation and Amortisation

h Trasse Schweiz is an independent path allocation body. The mentioned 'train kilometres' are the path-kilometres allocated in 2016. Trasse Schweiz is a not-for-profit organisation.

i The 2016 passenger figures for VR Group are not entirely comparable to the 2015 values due to a change in the statistical system.

j VPE is a train path allocation body. As such, it allocates train paths and constructs the timetable, but is not responsible for the operation and maintenance of the infrastructure.

k 2016 and 2015 numbers are not comparable as there has been a change in how these figures are recorded. Also, high-speed traffic is included in 2016 but not in 2015.

l Due to restructuring in 2015, the data for 2016 is not comparable to that of the previous year, which only covers the period 10.08.2015 to 31.12.2015. Infrastructure of Serbian Railways JSC has been operating as an independent joint stock company since 10 August 2015.

m The information provided for passengers, freight, turnover and EBITDA refers to the entire ÖBB Group (i.e. includes bus and freight transport on the road).

n 2015 data

o 2014 data

p 2013 data

q 2012 data

r UIC data



Publisher: Community of European Railway and Infrastructure Companies (CER) Avenue des Arts 53, 1000 Brussels - Belgium - www.cer.be

Design and production: www.inextremis.be (mp5657)
Photos: Kindly provided by CER members and Fotolia.com
Printed in Belgium in January 2018

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The Voice of European Railways

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