



**Annual
Report**
2015-2016





The Voice of European Railways

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, 80% of the rail freight business and about 96% 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.

For more information visit www.cer.be
or follow us via Twitter at [@CER_railways](https://twitter.com/CER_railways)

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2015-2016



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Libor Lochman, CER Executive Director



“ We will continue working closely with the European institutions on improving the performance of the railway sector and delivering our contribution to an even stronger sustainable Europe.

Rüdiger Grube
CER Chairman

I would like to express my gratitude to all CEOs of CER members who unanimously elected me CER Chairman on 19 September 2016. I feel very honoured by the trust you placed in me. As CER Chairman, I will use my mandate to the benefit of all members, regardless of their size, regional origin or structure.

Today, Europe more than ever needs the railways as a reliable, sustainable and competitive transport mode. It is one of the key factors in coping with challenges that the European Union is facing – climate change, uprising of powers hostile to the EU and growing uncertainty on the future of the Union.

After the British referendum on Britain's EU membership, our common understanding of the Union as a warrant for peace, free movement and open markets has been severely questioned. 60 years after the nucleus of the European idea was created in Rome, it seems anything but certain that future generations will protect and carry on the efforts that have been put into the European project. In the aftermath of the Brexit decision, the leader of the largest group in the European Parliament, Manfred Weber, has chosen nothing else but the railways to help the youth of Europe continue to grow together by putting forward the proposal to give every single European at the age of 18 a free Interrail ticket.

Earlier this year, the Commission finished its stocktaking exercise on the White Paper on Transport by publishing a midterm review. It fully confirms the bold targets from 2011 for making the transport sector more sustainable by shifting substantial parts of road transport to rail and other environmentally-friendly transport modes. Without this modal shift, Europe will not be able to fulfil its commitments from the COP21 conference on climate change on cutting greenhouse gas emissions. However, the targets need to be backed by strong efforts to improve the competitive framework conditions for rail.

Legislators took a major step in the European rail acquis by adopting the Fourth Railway Package. Its technical pillar that came into force in June 2016 will remove many barriers to market entry by improving authorisation procedures for railway vehicles on the European level and by supporting the harmonisation of national technical rules. The political pillar of the package that was adopted in December 2016 is a further step towards more competition in rail passenger transport and a reinforced regulatory framework. Both pillars will help the railways to better satisfy customers' needs. The proper and seamless implementation of the Fourth Railway Package will be a crucial factor.

Under the chairmanship of Christian Kern, CER worked on many important dossiers with great success to the benefit of the European railway sector. Christian Kern stepped down as CER Chair to become the Austrian Chancellor. I would like to thank him for his great dedication and passionate work for the European rail community. At the same time, I extend my gratitude to Andreas Meyer, who stepped in as Acting Chair and skilfully steered CER's affairs until my election in September 2016.

This CER Annual Report provides an overview of the association's main focus during the last 18 months. We will continue working closely together with European institutions on improving the performance of the railway sector and delivering our contribution to an even stronger, sustainable Europe. To this end, our agenda for the months to come will focus on tangible results in the most important areas: implementation of the Fourth Railway Package's technical pillar, improved cooperation in ticketing and data exchange, digitalisation and innovation, strengthening the development of rail corridors and improving intermodal framework conditions for rail.

Rüdiger Grube
CER Chairman



Rüdiger Grube

CER Chairman



Andreas Meyer

CER Acting Chairman

Foreword

It was my honour and pleasure to serve in the course of this year as Acting Chairman of CER.

The year 2016 was a year of completion.

In the European Union, the Fourth Railway Package was finally adopted. Nevertheless, we must remain vigilant as several implementing and delegated acts remain to be elaborated. We must make sure that this final set of rail legislation will be beneficial for the sector and our customers. Now, the time has come to tackle intermodal competition; starting with the road initiative.

In my country Switzerland, the focus was on improving rail infrastructure and on the opening of the new Gotthard Base Tunnel, the longest railway tunnel in the world. It has been a great privilege for me to serve as the CEO of the Swiss Federal Railways in these historical days and to celebrate this important milestone together with the members of the CER Management Committee.

2016 was also a year of setting the agenda for the 'Mobility of the Future' on the basis of the 'Lugano Agenda'.

The world of mobility is changing fundamentally. Technological progress is fostering new customer needs and mobility behaviours. Intermodal competition is increasing. The overall costs of railways are on the rise, while other transport modes are anticipating great potential for savings. At the same time, public funds are becoming increasingly scarce, while regulatory requirements are becoming ever more stringent.

Given these challenges, we – the railway community – have to act now!

We have to improve reliability and punctuality in the railway system. We must leverage the full potential of digitalisation and new technologies to offer our customers door-to-door mobility solutions tailored to their needs. We need to work together to render railway systems more open and compatible by harmonising technical standards and by using standardised interfaces. We have to position ourselves as mobility integrators in the intermodal mobility chain by providing transfer opportunities to other modes of transport at our mobility hubs. And we have to promote rail as a key tool to combat climate change by providing a clean and energy-efficient means of transport.

The new Gotthard Base Tunnel is an outstanding landmark project, setting standards for Europe and inspiring the world. It is also a symbol that it is still possible to achieve real milestones when politics, society and the rail operating community jointly pursue consistent objectives. However, infrastructures can only deliver their full potential if they become an integral part of the increasingly international and interdependent railway system.

Therefore we must continue working together and focusing on the strength of railways. We must make railways fit for future challenges. Let us seize the opportunities of change in order to play a crucial role in the 'Mobility of the Future'.

Andreas Meyer
CER Acting Chairman
(May - September 2016)

Foreword

Over the past 18 months, CER has kept up its determined work in carrying out its mission: to promote rail as the backbone of European mobility and as a key enabler of the European Union's long-term strategy for decarbonising its economy.

It has been a busy time both for the policymakers and the sector.

We asked for an open, fair Single European Rail Area where all players and market forces could lead towards ever more efficient services for logistics intermediaries, long-distance passengers as well as daily commuters. The work done on both pillars of the Fourth Railway Package will certainly bring huge benefits in the near future: domestic markets will be open to competition not only on paper, and a strengthened EU Agency for Railways will boost rail interoperability while ensuring the highest level of safety.

Further work has been done on other essential aspects of transport policy, which we followed throughout the process: we contributed to the definition of the acts implementing the First Railway Package, we promoted the dialogue between social partners, we provided technical input to the EU Agency for Railways in defining the sector's technical specifications, and we actively participated in PRIME as well as in the RU Dialogue platform – the European Commission initiatives providing a forum for infrastructure managers and railway undertakings to exchange views on current and potential future challenges.

And throughout all this work, we always kept our eyes firmly on the future.

We have identified sector business priorities and a corresponding action plan aiming at a step change in the increase of railways' efficiency. Besides the rapid implementation of the technical pillar of the Fourth Railway Package, digitalisation has been set as one of the top priorities. As a part

of the digital evolution, the Full Service Model will be the enabler of better rail ticketing services throughout Europe. In the area of freight, the Rotterdam declaration signed in June 2016 paves the way for more competitive rail freight. Last but not least we are proposing concrete ways in which the security of the rail system can be increased, while at the same time preserving its openness to last-minute customers.

But of course our efforts will not be truly fruitful unless the legislators take full responsibility for addressing the intermodal imbalances still present in the bigger picture. This is why we are looking with hope and confidence at a number of legislative dossiers that are expected to be published next year. In particular, the road transport initiatives, announced by the European Commission in 2015, will affect intermodal competition with rail.

After the negligible outcome of the 2008-2009 revision of the Eurovignette Directive, is there today a true commitment to decarbonising transport? Is there a real understanding of the cost-related distortions between road and rail transport? Is there the ambition to give rail the chance to fully deliver the benefits of its energy and environmental performance?

We certainly have this ambition, and we are ready to make sure that this ambition becomes a reality.

We hope you will enjoy reading our Annual Report, and we look forward to continuing working together to make a brighter future for the European rail sector.

Libor Lochman
CER Executive Director

**Libor
Lochman**
CER Executive Director

1

CER at a glance

- 1.1 The Voice of European Railways
- 1.2 CER members
- 1.3 CER activities and political events
- 1.4 The European Railway Award





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



83%

of the European rail freight business



95%

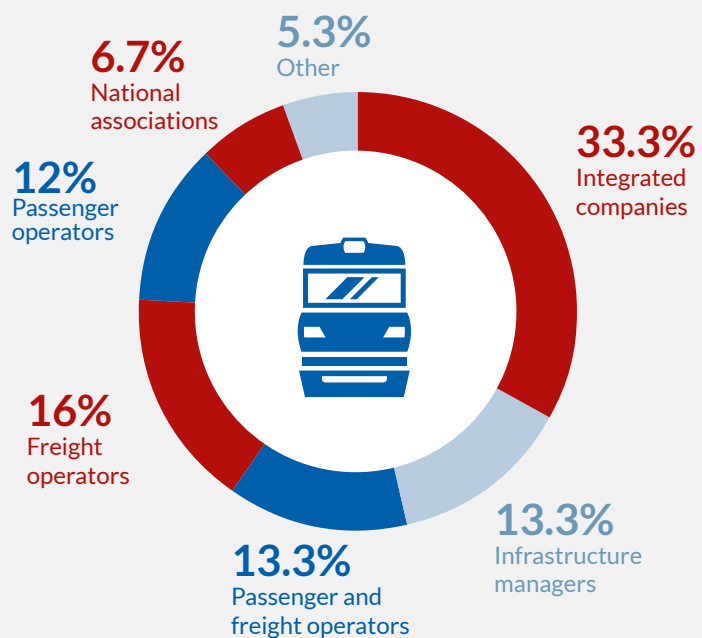
of rail passenger operations in Europe

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, 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

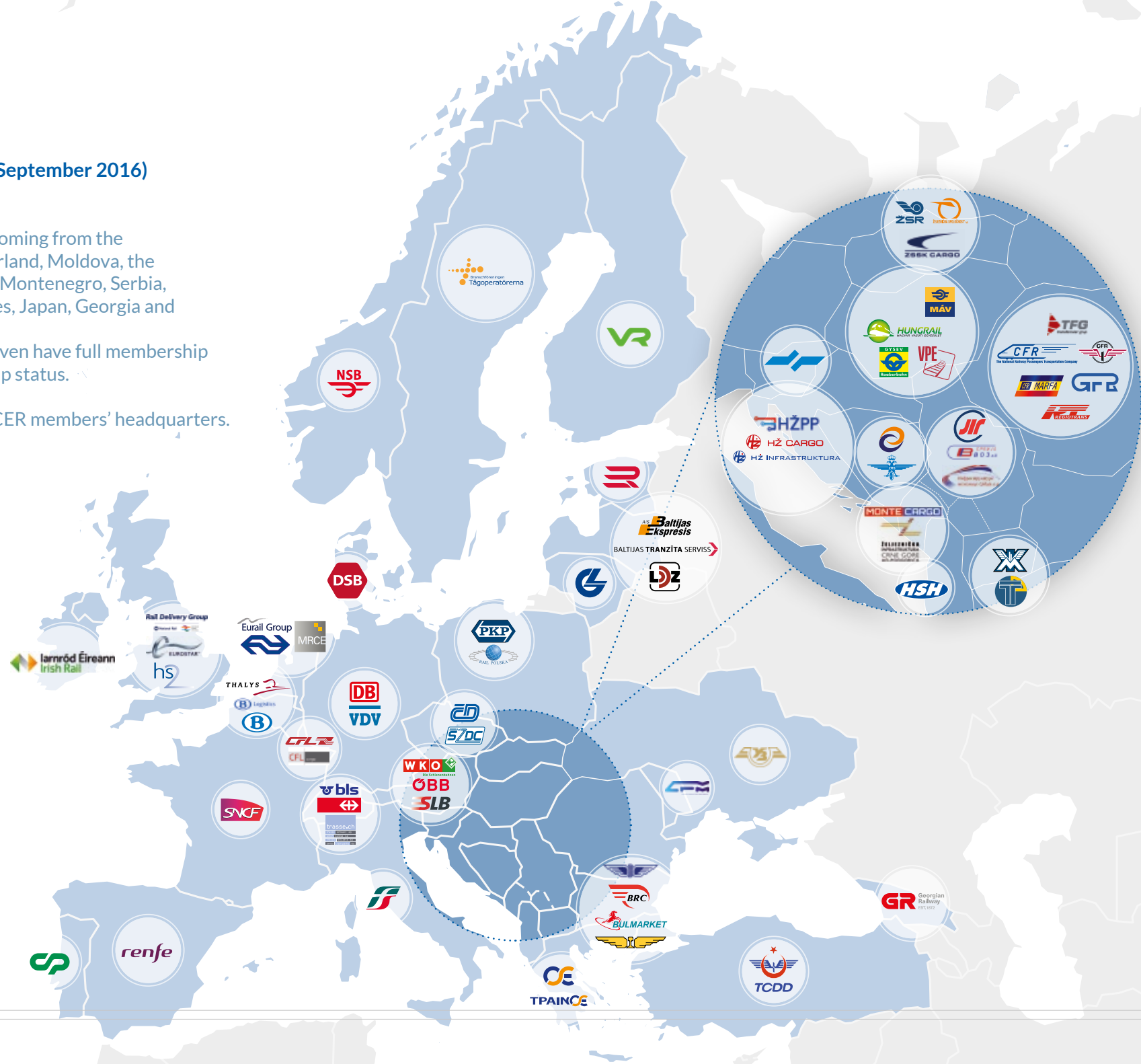
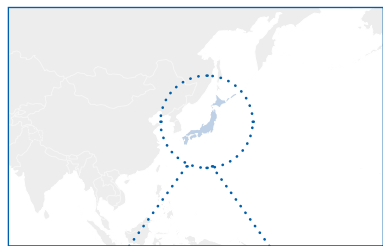
- ▶ **European institutions**
Council of the EU, European Commission, European Parliament, European Union Agency for Railways
- ▶ **Other organisations including:**
ASECAP, CEEP, CIT, EBRD, EIB, EFRTC, EIM, EPF, ERFA, ETF, IRU, OTIF, OSJD, RNE, SEETO, T&E, UIC, UNIFE, UIP, UIRR, UITP, and World Bank

1.2 CER members (as of September 2016)

CER has seventy-five members, coming from the European Union, Norway, Switzerland, Moldova, the candidate countries (Macedonia, Montenegro, Serbia, Turkey), Western Balkan countries, Japan, Georgia and Ukraine.

Among these companies, sixty-seven have full membership status, and eight enjoy partnership status.

This map depicts the location of CER members' headquarters.





Country	Name	Logo
ALBANIA	Hekurudha Shqiptare (HSH) Albanian Railways	
AUSTRIA	Fachverband der Schienenbahnen (WKO) Austrian Railway Association	
AUSTRIA	Österreichische Bundesbahnen (ÖBB) Austrian Federal Railways	
AUSTRIA	Salzburger Lokalbahn (SLB) Salzburg Regional Railway	
BELGIUM	B-Logistics B-Logistics	
BELGIUM	Société Nationale des Chemins de fer Belges Nationale Maatschappij der Belgische Spoorwegen Belgian National Railways (SNCB/NMBS)	
BELGIUM	Thalys International (Thalys) Thalys International	
BOSNIA-HERZEGOVINA	Željeznice Federacije Bosne i Hercegovine (ŽFBH) Railways of the Federation of Bosnia-Herzegovina	
BOSNIA-HERZEGOVINA	Željeznice Republike Srpske (ŽRS) Railways of the Republic of Srpska	
BULGARIA	Balgarski Daržavni Železnitsi (BDŽ Holding) Bulgarian Rail Operator	
BULGARIA	Bulgarian Railway Company (BRC) Bulgarian Railway Company	
BULGARIA	Bulmarket (Bulmarket) Bulmarket	
BULGARIA	Nacionalna Kompania Železopatna Infrastruktura (NRIC) Bulgarian National Railway Infrastructure Company	
CROATIA	Hrvatske Željeznice Putnički Prijevoz (HŽ Putnički Prijevoz) Croatian Railway Passenger Company	

Country	Name	Logo
CROATIA	Hrvatske Željeznice Cargo (HŽ Cargo) Croatian Cargo Railway Company	
CROATIA	Hrvatske Željeznice Infrastruktura (HŽ Infrastruktura) Croatian Infrastructure Railway Company	
CZECH REPUBLIC	České Dráhy (ČD) Czech Railways	
CZECH REPUBLIC	Správa Železniční Dopravní Cesty (SŽDC) Czech Railway Infrastructure Administration	
DENMARK	Danske Statsbaner (DSB) Danish State Railways	
ESTONIA	Eesti Raudtee (EVR) Estonian Railways	
FINLAND	VR-Yhtymä Oy (VR Group) VR-Group - Finnish Railways	
FRANCE	Société Nationale des Chemins de Fer Français (SNCF) French National Railway Company	
GERMANY	Deutsche Bahn (DB) German Railway Group	
GERMANY	Verband Deutscher Verkehrsunternehmen (VDV) German Railway Association	
GREAT BRITAIN	Rail Delivery Group (RDG) Rail Delivery Group (passenger services only)	
GREAT BRITAIN	Eurostar (UK) (Eurostar) Eurostar (UK)	
GREAT BRITAIN	High Speed Two (HS2) High Speed Two	
GREECE	Organismo Siderodromôn Elladas (OSE) Hellenic Railways Organisation	







Country	Name	Logo
GREECE	TRAINOSE (TRAINOSE) TRAINOSE - Greek National Passenger Train Operating Company	
HUNGARY	Magyar Vasúti Fuvarozói Egyesülés (HUNGRAIL) Hungarian Railway Association	
HUNGARY	Magyar Államvasutak (MÁV) Hungarian State Railways	
HUNGARY	Győr-Sopron-Ebenfurti Vasút (GySEv) / Raab-Oedenburg-Ebenfurter Eisenbahn GySEv	
IRELAND	Iarnród Éireann (IÉ) Irish Rail	
ITALY	Ferrovie dello Stato Italiane (FS Italiane) Italian Railway Group	
LATVIA	Baltijas Ekspressis (BE) Baltic Rail Freight Company	
LATVIA	Baltijas Transita Serviss (BTS) Baltic Transit Services	
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 Cargo Company	
MACEDONIA	Makedonski Železnici Infrastruktura (PE MZ Infrastruktura) Railways of the Former Yugoslav Republic of Macedonia Infrastructure	

Country	Name	Logo
MACEDONIA	Makedonski Železnici Transport (PE MZ Transport) Railways of the Former Yugoslav Republic of Macedonia Transport	
MONTENEGRO	Montecargo (Montecargo) Montenegro National Freight Operating Train Company	
MONTENEGRO	Željeznicka Infrastruktura Crne Gore (ZICG) Rail Infrastructure 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 Rail Poland	
PORTUGAL	Comboios de Portugal (CP) Portuguese Railway Company	
ROMANIA	Compania Națională de Cai Ferate (CFR) Romanian National Infrastructure Company	
ROMANIA	Societatea Națională de transport Feroviar de Călători (CFR Călători) Romanian National Passenger Train Operating Company	
ROMANIA	Societatea Națională de Transport Feroviar de Marfă (CFR Marfă) Romanian National Freight Operating Train Company	
ROMANIA	Grup Feroviar Roman (GFR) Romanian Railway Group	
ROMANIA	Regiotrans Brasov (Regiotrans) Romanian Transport Brasov	

Country	Name	Logo
ROMANIA	Transferoviar Grup (TFG) Romanian Railway Company	
SERBIA	Železnice Srbije (ŽS) Serbian Railways	
SERBIA	Srbija Voz (ŽS Passenger) Passenger Railway Transport Company	
SERBIA	Infrastruktura Železnice Srbije (ŽS Infrastructure) Infrastructure of Serbian Railways	
SLOVAKIA	Železnice Slovenskej Republiky (ŽSR) Slovak Infrastructure Company	
SLOVAKIA	Železničná Spoločnosť Slovensko (ZSSK) Slovak Rail Passenger Operator	
SLOVAKIA	Železničná Spoločnosť Cargo Slovakia (ZSSK Cargo) Slovak Rail Freight Company	
SLOVENIA	Slovenske Železnice (SŽ) Slovenian Railways	
SPAIN	Renfe Operadora (Renfe) National Spanish Railway Operator	
SWEDEN	Sveriges Branschföreningen Tågoperatörerna (ASTOC) Association of Swedish Train Operating Companies	
SWITZERLAND	BLS (BLS) Swiss Railway Company	

Country	Name	Logo
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 Railway	

Partners

Country	Name	Logo
JAPAN	East Japan Railway Company (JR East) East Japan Railway Company	
GEORGIA	Georgian Railway Ltd (GR) Georgian Railway	
HUNGARY	Vasúti Pályakapacitás-Elosztó (VPE) Hungarian Railway Capacity Allocator	
MOLDOVA	Calea Ferată Moldova (CFM) Moldovan Railways	
NETHERLANDS	Eurail Group (Eurail) Eurail Group	
NETHERLANDS	Mitsui Rail Capital Europe (MRCE) Locomotive Leasing Company	
SWITZERLAND	Trasse Schweiz AG (Trasse Schweiz) Swiss Train Path Allocating Body	
UKRAINE	Ukrzaliznytsia (UZ) Ukrainian Railway	

1.3 CER activities and political events

28 April 2015

The European Commission sets out a European Agenda on Security for the period 2015-2020.

29-30 April 2015

CER participates in Asia-Europe Transport Ministers' Meeting (ASEM) organised by the Latvian Ministry of Transport.

5-6 May 2015

CER together with DG TAXUD and the national customs authorities meet for their annual Joint Customs Meeting in Bratislava hosted by ZSSK Cargo.

28-29 May 2015

The CER HR Directors Group meets in Bratislava.

2-3 June 2015

The High-Level Infrastructure Meeting takes place in Warsaw.

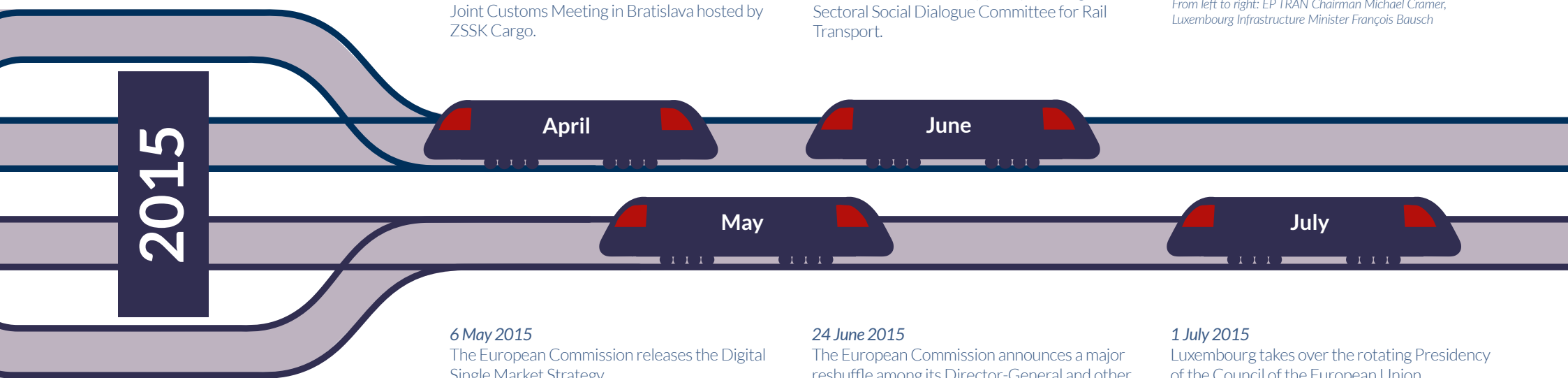
17 June 2015

CER attends the annual plenary meeting of the Sectoral Social Dialogue Committee for Rail Transport.



13 July 2015- CER Summer Cocktail

From left to right: EP TRAN Chairman Michael Cramer, Luxembourg Infrastructure Minister François Bausch



CER Chairman Christian Kern hosting the CER General Assembly in Vienna



8 May- CER General Assembly

6 May 2015

The European Commission releases the Digital Single Market Strategy.

8 May 2015

EU Agency for Railways Executive Director Josef Doppelbauer speaks at CER General Assembly hosted by ÖBB in Vienna.

12 May 2015

CER and FSI organise a joint workshop in Milan: 'Rail Governance after the Recast Directive'.

22 May 2015

European rail freight CEOs meet in Paris for their annual High-Level Freight Meeting.

24 June 2015

The European Commission announces a major reshuffle among its Director-General and other senior management positions. Henrik Hololei is to become DG MOVE's new Director-General as from 1 October 2015 succeeding João Aguiar Machado.

29 June 2015

The Group of Representative Bodies (GRB) organises a discussion round with Josef Doppelbauer.

1 July 2015

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

13 July 2015

CER holds its Summer Cocktail in the presence of the Luxembourg Minister for Infrastructure, François Bausch, and TRAN Committee Chairman Michael Cramer.

9 September 2015

European Commission President Jean-Claude Juncker delivers his first 'State of the Union' address, a traditional speech on the political, economic and social situation in the European Union.

24 September 2015

Meeting in Oslo, the CER General Assembly elects its Management Committee and reconfirms ÖBB CEO Christian Kern as CER Chairman for the next two years.

1 October 2015

CER Executive Director Libor Lochman meets incoming DG MOVE Director-General Henrik Hololei.

8 October 2015

Council of the EU reaches consensus on Market Pillar of Fourth Railway Package.

13 October 2015

CER organises a workshop entitled 'Future of EU ETS: What role for transport?' in Brussels.

5 November 2015

The European Commission launches the second CEF call for proposals worth over EUR 7.6 billion to finance key transport projects.

28 November 2015

Delegates from across Europe and Asia travel by train to Paris for the COP21 United Nations Conference on Climate Change that officially starts on 30 November.

2 December 2015

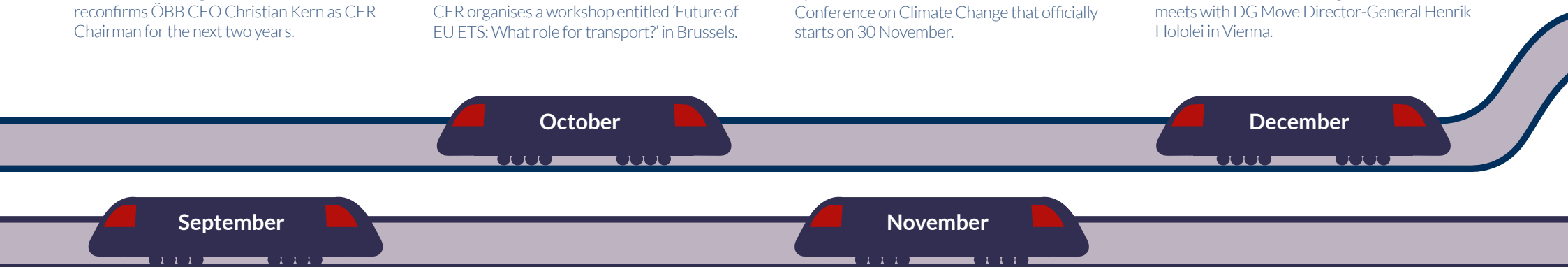
CER HR Directors Group takes place in Brussels.

2 December 2015

The European Commission publishes a new legislative proposal on accessibility requirements for products and services.

4 December 2015

The newly established Freight CEO Task Force meets with DG Move Director-General Henrik Hololei in Vienna.



29 September 2015

CER Executive Director Libor Lochman meets DG HOME Director-General Matthias Ruete to discuss issues related to rail security and terrorism.



24 September 2015- CER General Assembly in Oslo

20 October 2015

CER and UNIFE organise a Rail Forum Europe dinner to take stock of Juncker's EFSI.

26 October 2015

CER and FSI host a high-level event at Expo Milan on the Fourth Railway Package.

27 October 2015

The European Commission publishes its 2016 work programme entitled 'No time for business as usual'.



28 November 2015- COP21 Train to Paris

4 December 2015

CER and ETF present their recently adopted Joint Declaration on Rail Freight on the occasion of the 2nd European Rail Freight Day in Vienna.

15 December 2015

The kick-off meeting of the ERTMS Stakeholder Platform takes place in Brussels.

17 December 2015

SHIFT²RAIL, the joint undertaking backed by the Commission and the rail industry, publishes its first call for proposals, endowed with EUR 170 million to support innovation in railways.

1 January 2016

The Netherlands takes over the rotating Presidency of the Council of the European Union.

12 January 2016

CER co-sponsors a Rail Forum Europe dinner on Track Access Charging.

18 January 2016

CER Executive Director Libor Lochman meets ITF Secretary General José Viegas in Paris.

17 February 2016

The CER General Assembly elects new Management Committee Vice-Chair Ms Renata Suša (CEO HŽ Infrastruktura) and Mr Renato Mazzoncini (CEO FS Italiane) as Management Committee Member, in addition to approving three new members: B Logistics, Srbija Voz and Infrastruktura Železnice Srbije.

18 February 2016

CER Executive Director Libor Lochman meets Juraj Nociar, Head of Cabinet of Vice-President Maroš Šefčovič, together with the Slovak Deputy Permanent Representative Ambassador Alexander Micovčin.

4 April 2016

The European Commission adopts the Commission Implementing Regulation on procedures and criteria concerning framework agreements for the allocation of rail infrastructure capacity.

7 April 2016

The FOSTER RAIL Final Technology and Innovation Roadmaps are officially endorsed by the ERRAC members during the project's final conference.

2016

January

February

April

3 February 2016

The annual High-Level Passenger Meeting takes place in Paris.

16 February 2016

Isabelle Durant, former Vice-President of the European Parliament, and railway engineer Eric Fontanel receive the European Railway Award.



25 April 2016 - Digital railways - present technologies, future trends

From left to right: MEP Wim van de Camp, European Commission Director Olivier Onidi, and Bettina Wunsch Semmler (DB Netz)

19 April 2016

The European Parliament, the Council and the European Commission reach an agreement on the Market Pillar of the Fourth Railway Package.

21 April 2016

Freight CEOs gather in Vienna for their 2016 High-Level Freight Meeting.

25 April 2016

CER's event 'Digital railways: present technologies, future trends' in Brussels attracts over 150 participants to learn about more than 40 digital railway projects and products.

25 April 2016

CER, CIT, EIM and UIC present a joint roadmap for digital railways.

28 April

The European Parliament approves the Council Common Position on the Technical Pillar of the Fourth Railway Package.

29 April 2016

The CER Group of HR Directors meets in Vienna.

1 June 2016

The Gotthard Base Tunnel, the longest rail tunnel in the world, is inaugurated.

2 June 2016

The annual High-Level Infrastructure Meeting takes place in Coventry.

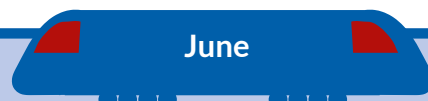
9 June 2016

The GRB organises another discussion round with Josef Doppelbauer.



From left to right: Jan Koeman, Deputy Director, Government of the Netherlands, MEP Wim van de Camp, EP TRAN Committee, Sian Prout, Head of Unit, European Commission, DG MOVE, Matgorzata Domurat, Company lawyer, PKP Cargo

14 June 2016 - Strategies to tackle rail freight noise



30 May 2016

The CER Management Committee appoints SBB CEO Andreas Meyer as CER Acting Chairman. He follows Christian Kern who stepped down to become Chancellor of Austria.



25 April 2016 - CER Digitalisation fair

14 June 2016

CER and the Netherlands Presidency of the EU jointly organise a political debate 'Strategies to tackle rail freight noise - Potential benefits and challenges'.

15 June 2016

Following the entry into force of the Technical Pillar of the Fourth Railway Package, the European Union Agency for Railways succeeds the European Railway Agency (ERA).

21 June 2016

CER, CLECAT, EIM, ERFA, ERTMS Users Group, ESC, UIP, UIRR, and UNIFE, supported by the Rail Freight Corridors, present a declaration at the TEN-T Days committing themselves to the aim of enhancing the competitiveness of the Rail Freight Corridors.

21 June 2016

The Netherlands Presidency of the EU together with the European Commission organises a Business Conference on Rail Freight Corridors.

29 June 2016

CER co-sponsors a lunch debate on ensuring long-term investment for a sustainable railway sector in the European Parliament.

1 July 2016

Slovakia takes over the Presidency of the EU for the first time.

8 July 2016

CER Executive Director Libor Lochman meets Ukrainian Infrastructure Minister Volodymyr Omelyan.

11 July 2016

CER organises the 2016 Summer Cocktail in Brussels.



From left to right: CER Executive Director Libor Lochman and new CER Chairman Rüdiger Grube (CEO of DB)

20 September 2016

The CER Management Committee meets European Transport Commissioner Violeta Bulc on the opening day of InnoTrans.

20 September 2016

The European Commission, the EU Agency for Railways, and the rail sector organisations (including CER) sign a new Memorandum of Understanding for ERTMS.

2016



12 July 2016

CER officially signs the Joint Initiative on Standardisation.

31 August 2016

CER publishes a position paper related to VAT on cross-border travel, expressing support for the Commission's proposal in its VAT Action Plan.

14 September 2016

European Commission President Jean-Claude Juncker delivers the 2016 State of the Union address.

19 September 2016

The CER General Assembly held in Berlin elects DB CEO Rüdiger Grube as the Association's new Chairman and welcomes Ukrainian Railways and Eurail Group as new partners.

19 September 2016

The Council of the EU appoints Julian King as the new Commissioner for Security Union, representing the UK in the College of Commissioners.



20 September 2016 - New Memorandum of Understanding for ERTMS

From left to right: CER Executive Director Libor Lochman, European Transport Commissioner Violeta Bulc, EU Agency for Railways Executive Director Josef Doppelbauer

4 October 2016

The European Parliament approves the ratification of the COP21 Paris Agreement by the European Union. Following the vote in the European Parliament giving its consent, the Council adopts the decision on the very same day.

6 October 2016

The European Border and Coast Guard Agency is officially launched, less than a year after it was first proposed by the Commission.

17 October 2016

CER participates in the first EU-Iran seminar on rail issues as part of the EU delegation.

17 October 2016

The Council of the EU formally adopts the Fourth Railway Package's Market Pillar.

20 October 2016

CER together with Eurail meets European Transport Commissioner Violeta Bulc.



17 October 2016 - EU-Iran seminar on rail issues

October**November****December****12 October 2016**

CER organises a policy session on low-emission mobility in Europe in the framework of the UIC Sustainability Conference in Vienna.

13 October 2016

CER participates in the annual Sectoral Social Dialogue Committee for Rail Transport in Brussels.

13 October 2016

The European Commission launches a new round of calls for proposals under the EU funding programme for transport infrastructure ('Connecting Europe Facility').



20 September 2016 - Meeting with Commissioner Bulc

From left to right: CER Executive Director Libor Lochman, European Transport Commissioner Violeta Bulc, Eurail Deputy General Manager Silvia Fischer

8 November 2016

CER organises a high-level meeting in Prague with GSA Executive Director Carlo des Dorides, Shift2Rail Executive Director Carlo Borghini and EU Agency for Railways Executive Director Josef Doppelbauer to discuss rail-related satellite applications.

9 November 2016

The CER Group of HR Directors meets in Brussels.

28 November 2016

CER and the Slovak Presidency of the EU jointly organise a panel discussion on the future solutions for a sustainable and low-emission EU transport system.

5 December 2016

CER co-organises a Rail Forum Europe dinner debate on the future of rail freight.

9 December 2016

CER participates in the European Rail Freight Day organised by the European Commission in Vienna.

1.4 The European Railway Award 2016

Jointly organised by CER and UNIFE, the European Railway Award 2016 was presented on 16 February to Isabelle Durant, former Vice-President of the European Parliament, for political achievements and to railway engineer Eric Fontanel for technical achievements.

Keynote speaker of the gala evening European Commissioner for Transport, Violeta Bulc highlighted the importance of investment to the development of the European rail system, commenting: “Our very first priority is to bring investments in the rail sector as without such investments rail won’t be able to contribute to our decarbonisation and digitalisation objectives.”

Representing the European Parliament, MEP Michael Cramer (Greens/EFA, DE), Chairman of the Committee on Transport and Tourism, underlined the need for fair competition between transport modes, remarking: “The European railway sector should use their influence to push decision makers to make modal competition more fair regarding access charges.”

Representing the Netherlands Presidency of the EU at the ceremony, Secretary-General of the Dutch Ministry of Infrastructure and the Environment, Lidewijde Ongering, commented:



From left to right: Cyril Legat (SNSM), Technical Award winner Eric Fontanel, Transport Commissioner Violeta Bulc, EP TRAN Chairman Michael Cramer, Political Award Winner Isabelle Durant, UNIFE Chairman Laurent Troger, CER Chairman Christian Kern, Piet Jonckers (Train World), Secretary-General of the Dutch Ministry of Infrastructure Lidewijde Ongering, artist François Schuiten, UNIFE Director-General Philippe Citroën, and CER Executive Director Libor Lochman

“We’re fortunate to have experts from the technical and political arenas who know what’s needed to take the EU railway sector to the next level. And it’s fitting that CER and UNIFE are awarding prizes to individuals

who have devoted much of their work to rail. A sector that drives the EU’s economy, while at the same time making a substantial contribution to the greening of transport.”



“ Our very first priority is to bring investments in the rail sector as without such investments rail won’t be able to contribute to our decarbonisation and digitalisation objectives.

Violeta Bulc
European Commissioner responsible for Transport



From left to right: UNIFE Director-General Philippe Citroën, Technical Award Winner Eric Fontanel, and CER Executive Director Libor Lochman



“ The European railway sector should use their influence to push decision makers to make modal competition more fair regarding access charges.

Michael Cramer
Chairman of the European Parliament Committee on Transport and Tourism



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

The laureate for the Technical Award 2016, Eric Fontanel, is an accomplished railway engineer responsible for many rolling stock development projects throughout the world, including managing the Channel tunnel VHST (very high-speed train) consortium which produced the Eurostar operation.

The Political Award winner, Isabelle Durant, was the Vice-Prime Minister of Belgium and Minister for Transport from 1999 to 2003, before becoming Vice- President of the European Parliament from 2009 to 2014. During her political career, she has always supported sustainable transport.

The European Railway Award honours outstanding political and technical achievements in the development of economically and environmentally sustainable rail transport. The award comes with prize money, which is donated to charity organisations of the laureates' choice. The jury for the European Railway Award 2016 consisted of CEOs of railway and rail industry companies as well as stakeholders from the transport sector and the EU institutions.

Please also visit
www.europeanrailwayaward.eu

The European Railway Award - history

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

► Political Award Winners



2007
Karel van Miert
Former European Commissioner for Transport



2009
Moritz Leuenberger
Former Swiss Transport Minister



2010
Felipe González
Former Spanish Prime Minister



2011
Ken Livingstone
British Labour politician and former Mayor of London



2012
Karel Vinck
European ERTMS Coordinator



2013
Benedikt Weibel
Former CEO of the Swiss Federal Railways (SBB)



2014
Jacques Barrot
Former European Commissioner for Transport



2015
Lord Andrew Adonis
Former UK Secretary of State for Transport



2016
Isabelle Durant
Former Vice-President of the European Parliament

► Technical Award Winners



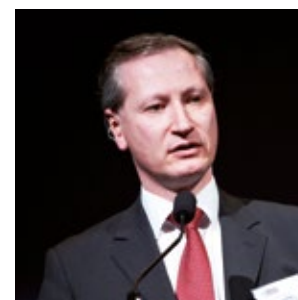
2007
Jean Dupuy
Former Director-General of SNCF



2009
Bengt Sterner
Inventor of the ETCS electronic train control system



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



2011
Stefan Haas
Managing Director, Knorr Bremse Austria



2012
François Lacôte
Senior Vice-President and Technical Advisor, Alstom



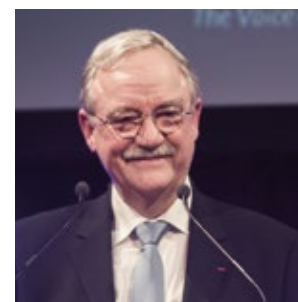
2013
Johannes Nicolin
Technical Director, AAE Holding AG



2014
Giorgio Diana
Researcher and Professor of Mechanical Engineering at Politecnico di Milano



2015
Alexander Neumeister
Industrial designer



2016
Eric Fontanel
Railway engineer

2

Market trends





Photo: fotolia.com

Market trends



Photo: fotolia.com

A survey¹ conducted by CER shows that the European rail freight market shrank by 6.5% in 2015, while European rail passenger operators achieved a moderate increase of 1.4%. This growth was more pronounced in Central and Eastern Europe (CEE) and Southeast Europe (SEE) where passenger-kilometres increased by 3.9% in 2015.



Decline of rail freight market across Europe

2015 proved to be a difficult year for the rail freight sector in Europe. Despite positive growth in 2014 (4.0%), the results for 2015 show that rail tonne-kilometres in Europe declined by 6.5%. As can be seen in Figure 1, the European rail freight sector performed less strongly in 2015 than the rate of growth of industrial production², which grew by 2.2% over the same period. Overall, the European rail freight market in 2015 remains 20.2% below the pre-crisis level of 2008.

As reflected in Figure 2, the rail tonne-kilometres in EU-15(+CH) declined by 5.5% in 2015, following an increase of 4.5% in 2014. The drop was slightly stronger in the first half of 2015 (-5.6%) compared to the second half (-5.3%). This negative trend was even more pronounced in CEE+SEE, where rail tonne-kilometres declined by 8.3% in 2015, despite an increase of 3.2% in 2014. The decline was felt particularly strongly in the second half of 2015 (-10.2%) compared to the first half (-6.5%).

1 CER conducts regular surveys among its members on the performance of the rail passenger and freight sectors.

2 Industry Production Index (which includes mining and quarrying, manufacturing, electricity, gas, steam and air conditioning supply), Eurostat, November 2016

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

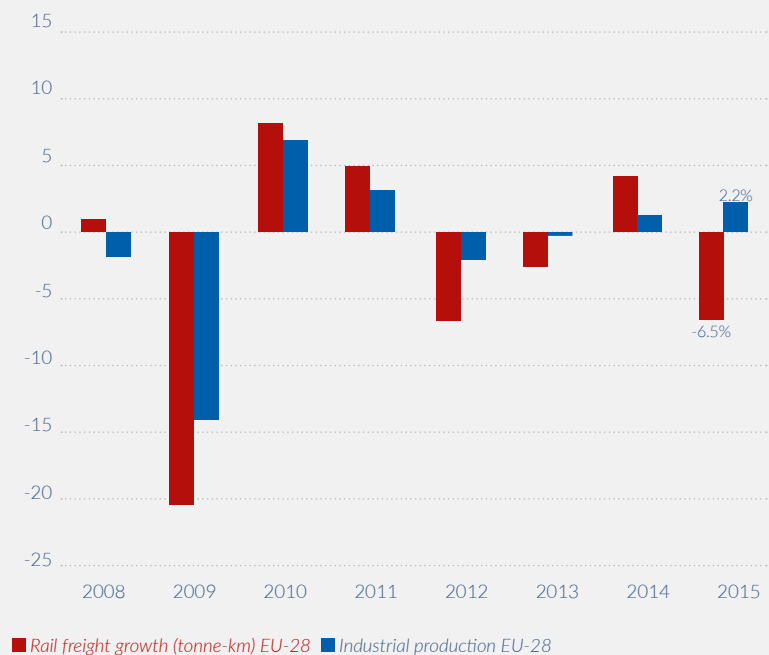


Figure 2: Annual rail freight development in Europe (million tonne-km)

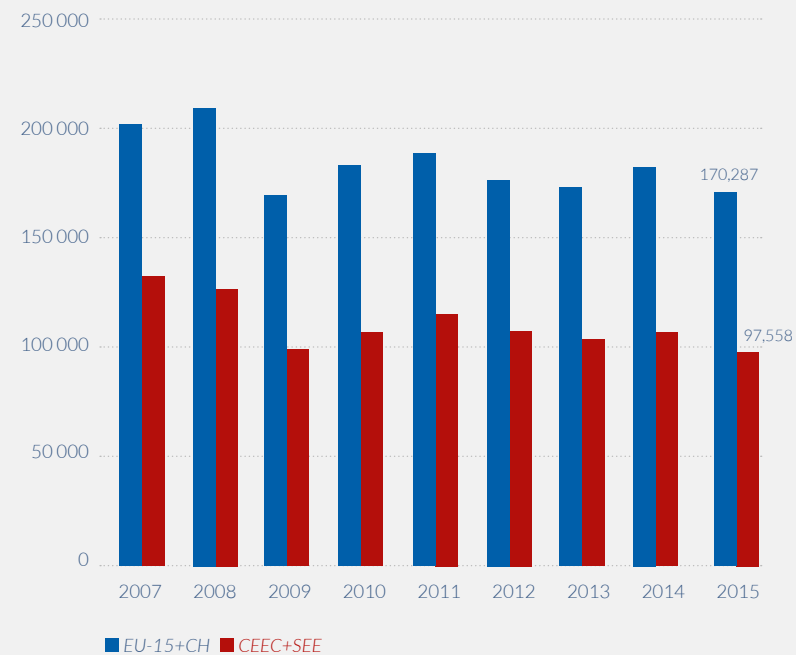
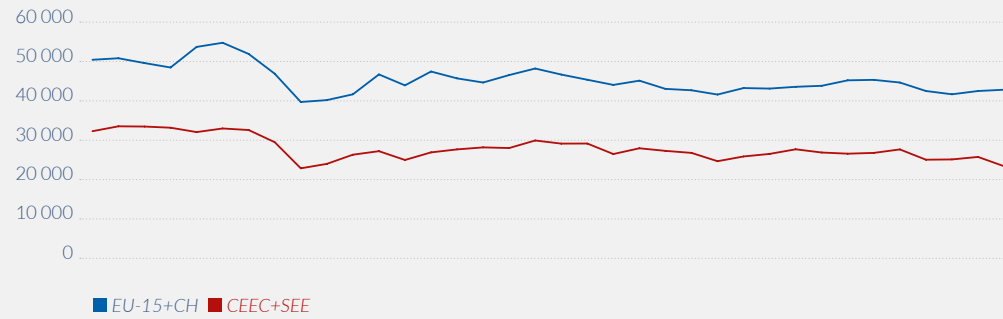


Figure 3: Quarterly rail freight development in Europe (million tonne-km)



Moderate growth in European rail passenger market

The rail passenger sector in Europe was able to maintain its moderate growth in 2015. Compared to the previous year, where passenger-kilometres increased by 0.8%, rail passenger operators in Europe grew by 1.4% in 2015. During the same period, the unemployment rate³ for the EU-28 decreased by 7.8%, from 10.2% in 2014 to 9.4% in 2015.

Rail passenger-kilometres in CEEC+SEE, which have experienced a slight annual decline since 2008, were able to break this negative trend in 2014 with an increase in passenger-kilometres of 0.5%. As can be seen in Figure 4, rail passenger operators in CEEC+SEE were able to maintain this positive development by growing passenger-kilometers by 3.9% in 2015. This trend was more pronounced in the second half of 2015, (4.2%) compared to the first half (3.6%).

As can be observed in Figure 4, the rail passenger market in EU15 (+CH) has been growing steadily in the past years, with a small interruption in 2009 as a result of the economic crisis. This growth was maintained in 2015, where rail passenger operators in EU15 (+CH) increased passenger-kilometres by a moderate 1.1%. The growth was more pronounced in the first half of 2015 (1.4%) compared to the second half (0.8%).

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

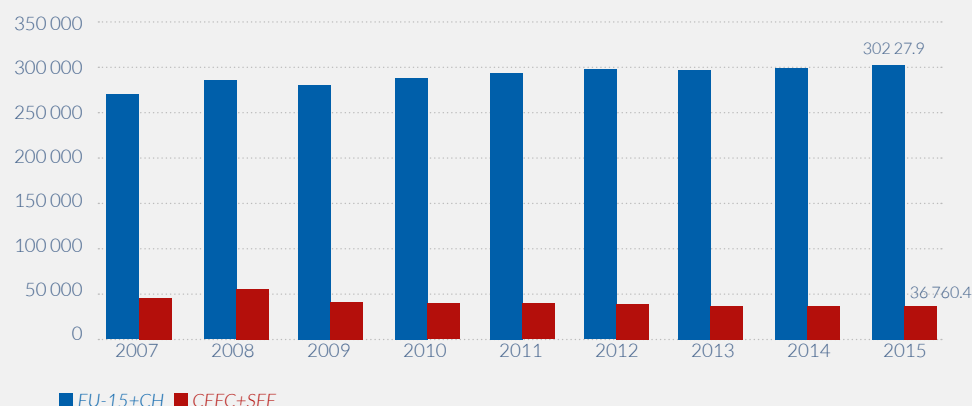
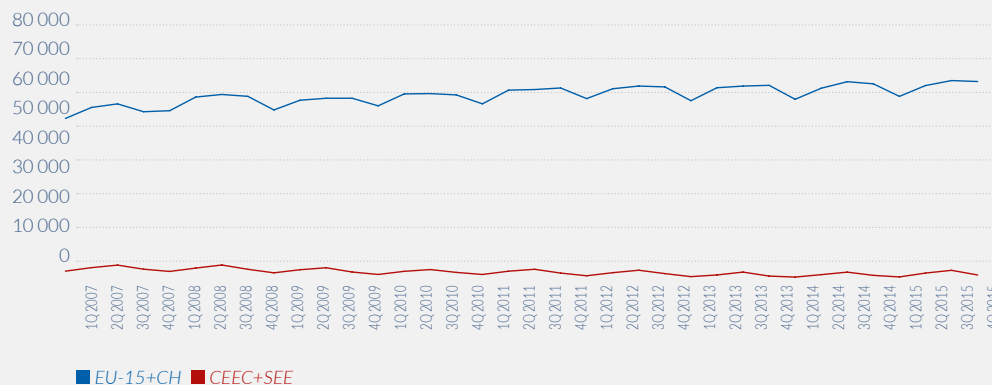


Figure 5: Quarterly rail passenger development in Europe (million passenger-km)

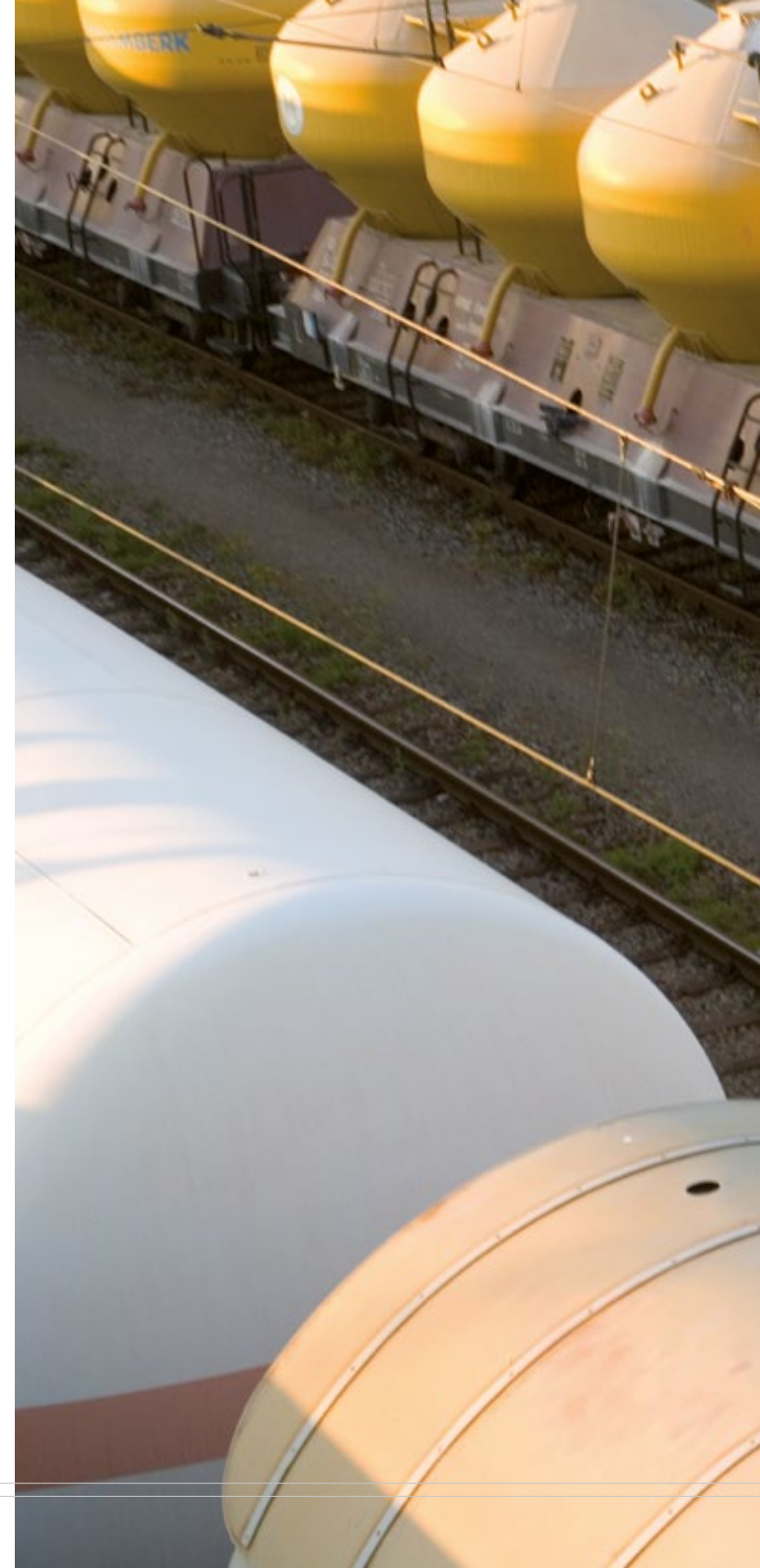


³ Unemployment rate, Eurostat, November 2016

3

Sector pillars

- 3.1 Railways and passengers: a successful partnership
- 3.2 Rail freight: reducing costs
- 3.3 Developing rail infrastructure
- 3.4 CER technical activities





3.1 Railways and passengers: a successful partnership

The passengers' associations and the railways share a common vision: a European rail sector that is the backbone of a seamless, multimodal, accessible and secure transport system, an enabler for the competitiveness, inclusiveness and sustainability of the European economy. Together they continue to develop their fruitful communication on these common priorities in the CER Customer Liaison Group (CLG).



The members of the CER Customer Liaison Group (CLG)

Transport White Paper: supporting rail means supporting our economy and citizens

Passenger associations and railways share a common vision: a European rail sector that is the backbone of a seamless, multimodal and accessible transport system, an enabler for the competitiveness, inclusiveness and sustainability of the European economy.

Effective steps need to be taken to turn the White Paper's objectives into reality, and the railways are committed to achieving a situation where the rail sector advances technological innovation and new service models in areas such as ticketing, travel information and real-time information for customers.

By continually embracing technological and societal changes, the sector works towards increased passenger care and service quality in order to better meet the needs and expectations of its customers.

1. Rail is essential for the EU's economic and employment recovery

Why should the EU and its Member States do more to support the rail sector?
Rail investment supports economic growth and job creation, while contributing to an inclusive society and promoting the freedom of movement for everyone within the EU.

Millions of people employed by the EU rail sector: 1.21 M (€37B)

Gross value added: 77 bn € (€49B)

9 BILLION passenger trips in the EU in 2013

Passengers are at the heart of the European railway business. From long-distance high-speed trains to local and regional trains, railway transport offers travel for all, including those without a car as well as elderly or disabled passengers.

2. Rail is essential for creating a safer and more sustainable transport system

The European rail sector is critical to the delivery of Europe's goals of cutting greenhouse gas emissions, achieving energy security, and alleviating congestion.

Mode	Specific CO ₂ emissions per transport mode (2008-2010)
Rail	41 gCO ₂ /tkm
Plane	110 gCO ₂ /tkm
Sea	112 gCO ₂ /tkm

Mode	Fatality rate per billion passenger kilometres (2008-2010)
Rail	0.13
Motorway	0.2
Car	0.14

Competitiveness of railways and increased passenger care

CER and the European Passengers' Federation (EPF) published a common declaration highlighting the essentialness of rail for economic growth and environmental sustainability. It called on decision makers to swiftly implement concrete policy measures to enable fair competition among transport

modes and to secure solid, sufficient and predictable funding of rail infrastructure to close the gap between the actual state of the rail network and what is required. The declaration also reaffirms the rail sector's commitment to work towards increased passenger care and service quality, by continually embracing technological and societal changes, in order to better meet the needs and expectations of rail customers.

Accessibility

The European rail sector strives to make rail services increasingly accessible for all users, as it is well aware of the contribution it can make in enhancing the social inclusion of disabled passengers. In this context, cooperation with disability associations is key. CER members are actively engaged in this dialogue both at national and European level. The recently proposed Directive on a European Accessibility Act (EAA) and the upcoming revision of the PRM TSI Regulation

(1300/2014) provided further opportunities to exchange views with the European Disability Forum (EDF) and decision makers on the right policy solutions to enhance accessibility in transport. In terms of EU regulation, CER stresses the importance of keeping one single framework in order to avoid double or conflicting EU provisions on the same topic. The existing Directive on the interoperability of the EU rail system (2016/797) already defines accessibility as an essential requirement. It is key to promote accessibility through this proven scheme, which is implemented by the PRM TSI.



In November 2016, CER participated in an event on the EAA hosted by MEP Olga Sehnalová (S&D, CZ) and co-organised by the EP Disability Intergroup and by EDF.

Security of rail passengers

In the context of security and protection of rail passengers, any policy action addressing these issues, in particular in cross-border traffic, should be coordinated between all stakeholders involved. Such coordination will ensure added value for the whole of society while applying proportionate measures taking into account the specificities of rail transport.

In the context of the ongoing terrorism threat, CER members are firmly engaged with passengers' associations to jointly discuss and identify concrete and appropriate measures to enhance security. At the same time, we jointly advocate keeping the existing flexibility of rail as an open-access transport mode, in order to avoid a loss of rail attractiveness for customers. Any consequent decrease in ridership would go against the European strategy of sustainable mobility (see also page 52 for further information).

Intermodality and rail-cycle solutions

It is the ambition of CER members to increasingly offer integrated mobility platforms and end-to-end customer services. Rail-cycle solutions are one of many important intermodal and sustainable travel options. Following a meeting between CER Executive Director Libor Lochman and European Cyclists' Federation (ECF)



ECF Secretary General Bernhard Ensink and CER Executive Director Libor Lochman

Secretary General Bernhard Ensink, a joint CER-ECF workshop was organised on facilitating first and last-mile bike journeys to and from stations. A group of CER members presented their ongoing work to improve conditions for bike-rail intermodality and discussed with ECF a wide range of topics. CER and ECF committed to reinforcing their cooperation on promoting cycle-rail intermodality, with a focus on urban mobility and support for biking to/from railway stations, for instance via bike parking facilities at stations.

Ticketing – sector initiatives

At the end of 2016, railways and ticket vendors completed a unique generation of distribution specifications which will help reshape the way European railway products are distributed within Europe and further afield. The “Full Service Model” (FSM) specifications will ultimately complement the already existing European TAP TSI standards.

By gradually implementing the FSM approach, tangible results for passengers are expected to be visible step-by-step within the next few years. When applied, the FSM specifications will improve customers travelling experience by providing passengers with easier access to rail offers through a wider range of distribution channels. It will also increase transparency of European rail offers and facilitate “through-ticketing” across several railway operators all around Europe. More widely, it will contribute to enhance service quality from the provision of pre-journey information to after-sales support. Finally, FSM specifications have been designed to facilitate the distribution of multimodal products.

In 2017, the FSM partners (DB, NS, PKP Intercity, RDG, SJ, SNCB, SNCF, Trenitalia, Amadeus, Sabre, Silverrail, Trainline.com Limited, Travelport) and their supporting associations (CER, CIT, ECTAA, ETTSA) will endeavor to make the FSM specifications known as widely as possible to ticket vendors, railways and IT developers.



Photo: fotolia.com

Rail Passenger Rights – from implementation to revision

On 3 July 2015, the European Commission published interpretative guidelines on Regulation 1371/2007 on rail passenger rights (PRR), aimed at clarifying the interpretation of the PRR by the National Enforcement Bodies (NEBs) and the national courts. CER worked closely with the European Commission to ensure that the guidelines reflect current railway practices as much as possible and preserve the commercial freedom of railway carriers, for instance when offering through-tickets.

CER also participated in the yearly meetings organised by the European Commission with NEBs. The latest meeting held in March 2015 gave the opportunity for CER to provide input along with NEBs and passengers' associations to the final text of the interpretative guidelines ahead of their publication.

Roadmap for a revision of Regulation 1371/2007

In their respective implementation reports on the PRR, both the Commission (Report on the Application of Regulation (EC) No 1371/2007 COM(2013)587 FINAL, 14 August 2013) and Steer Davies Gleave (Evaluation of Regulation 1371/2007, Final Report, July 2012) confirmed that railway undertakings are on the right track in terms of quality and passengers' rights. Particular progress is being made in two areas of utmost importance for the passengers - assistance to persons with reduced mobility (PRM) and disabled persons, as well as compensation, rerouting or refunds, and assistance in the event of travel disruption. This shows once more that CER members consider the protection of their customers first and foremost as a unilateral commitment.

Nevertheless, the European Commission officially kicked off the PRR revision process in 2016. The upcoming legislative proposal will address issues such as exemptions, force majeure, assistance and contingency planning in case of major disruptions, as well as accessibility and assistance to PRMs. CER will keep working closely with the European institutions to ensure that the revised rules will provide enough flexibility to railway undertakings, in order to take into account the different operational realities and financial frameworks in which railways operate across Europe.

Access to distribution data

Over the past two years, there were two political initiatives in the field of ticketing:

- an own-initiative report of the European Parliament on delivering multimodal integrated ticketing adopted in July 2015
- a delegated act on multimodal travel information services (MMTIS), to be adopted in early 2017.

During the legislative processes, CER consistently stressed the importance of making sure that strict framework conditions are in place to guarantee the quality of the information provided to customers and to avoid data misuse and misprocessing. This suggestion has been taken on board in a provision of the MMTIS Delegated Act which explicitly allows for license agreements to be used when exchanging data between data owners and users.



Photo: fotolia.com

3.2 Rail freight: reducing costs

Facing increasing costs directly linked to the implementation of EU law, rail freight CEOs are teaming up to take their destiny into their own hands.

EU law implementation proves challenging

ERTMS, noise abatement, timetabling, telematic applications for freight, track access charging, new corridor and cross-border interoperability rules... EU laws adopted over the past 15 years pervade all aspects of rail freight operations. Whereas most of these rules aim to improve rail freight competitiveness in the long run, their implementation elicits unexpected costs for rail freight operators in the short and medium term, jeopardising their profitability and sometimes their very viability.

On 22 May 2015, rail freight CEOs gathering at their annual high-level meeting decided to create a Task Force to address the most pressing issues concerning rail freight. The Task Force, made up of the CEOs of B-Logistics, BLS Cargo, DB Cargo, Hungrail, MRCE, ÖBB RCA, SBB Cargo, SNCF Logistics, Trenitalia Cargo and VDV launched 17 projects: some purely intra-sectorial (digitalisation, innovation, timetabling, conditions of use of the infrastructure...), some to be addressed at political level

(ERTMS, use of languages at borders, rolling stock authorisation, coordination of infrastructure works...).

The activities of the Freight CEO Task Force had a direct impact on the discussions over topical political dossiers like the Technical Pillar of the Fourth Railway Package and the follow-up on the recast of the First Railway Package.

The Task Force met with European Transport Commissioner Violeta Bulc as well as European Commission DG MOVE Director-General Henrik Hololei to explain the challenges for operators and how political stakeholders could help.

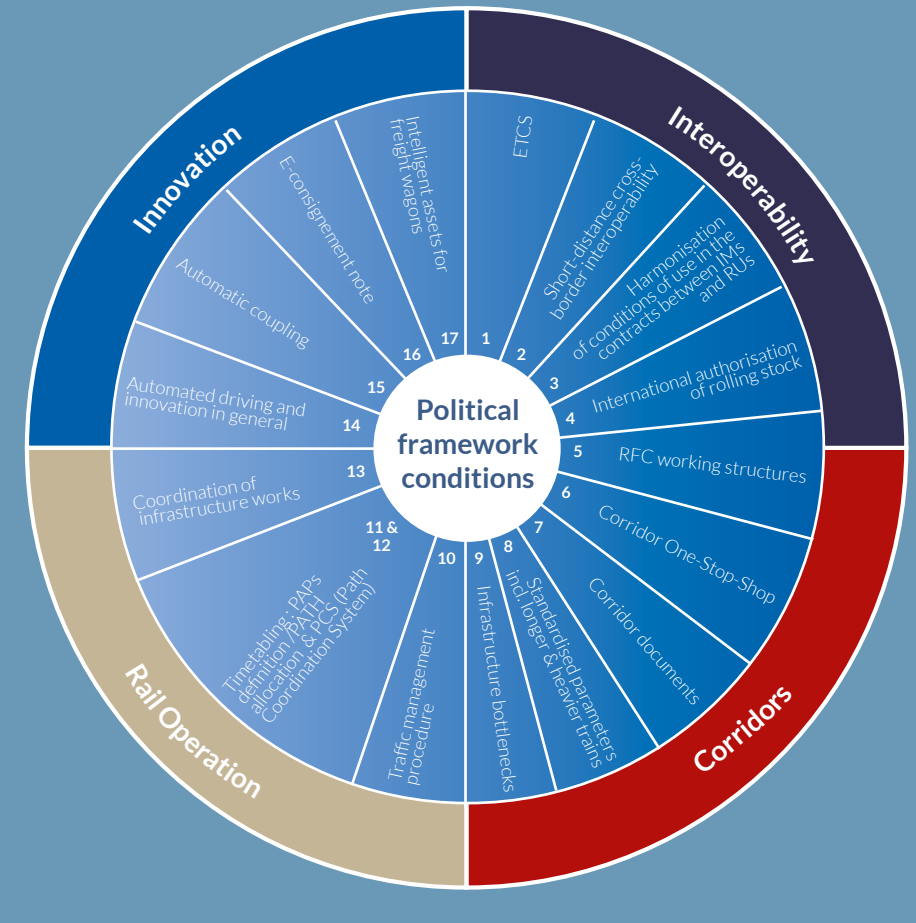
Last-mile infrastructure: €10 billion needed until 2030!

In 2014, the European Commission published a study which pointed to the lack of last-mile infrastructure as one of the main causes for the decline of single wagonload and rail freight in general in Europe. As a result, the Commission launched another study in 2015 aimed at identifying the “design features for supporting programmes for investments in last-mile infrastructure”.

CER was part of the consortium led by PriceWaterhouseCoopers (PwC). The study identifies and analyses existing support programmes dedicated to the financing and development of last-mile infrastructure available in Europe as well as non-dedicated

Freight CEO Task Force: 17 projects to boost rail freight competitiveness

17 projects in 4 clusters:
1. Interoperability **2. Corridors**
3. Operations **4. Innovation**



national and European instruments. It provides suggestions on how to develop, update and monitor a last-mile support programme. Not least, it identifies investment needs for the construction, revitalisation, and modernisation of last-mile infrastructure.

Depending on the growth scenarios (Trend / Minus / Plus), the study concludes that, investments of 9 to 11 billion euros would be needed until 2030 to upgrade existing or construct new last-mile infrastructure.

Investment needs for last mile infrastructure - new construction and upgrade

Scenarios	Main assumptions for the development of last-mile infrastructure	Variation of rail transshipment volume (t) compared to basis year (2010)	Variation of the number of last-mile infrastructure facilities compared to Status Quo (2015)	Investment needs for last-mile infrastructure (2015-2030)
Trend scenario «2030»	Extrapolation of current tendencies (i.e. increase of large sidings; abandoning of many small and some mid-sized facilities; public sidings will lose their relevance; rail logistics centres will (partially) substitute closed private and public sidings); intermodal volume increase will be handled primarily by upgrading/modernisation of existing facilities.	+19%	-27%	€ 9.7 billion
Minus scenario «2030»	Unfavourable conditions for rail freight compared to 'Trend' (i.e. higher concentration on large private sidings; above-average abandoning of small and mid-sized private sidings; public sidings will significantly lose their importance); framework conditions for the development of intermodal terminals do not change significantly compared to the Trend scenario.	-2%	-49%	€ 8.9 billion
Plus scenario «2030»	More favourable conditions for rail freight compared to 'Trend' (i.e. ongoing trend towards large private sidings; above-average 'survival' of small and mid-sized private sidings). Framework condition for the development of intermodal terminals do not change significantly compared to the Trend scenario.	+28%	-20%	€ 11.2 billion

Source: PwC study

The results of the study were presented at the third edition of the European Commission's Rail Freight Day in Vienna on 9 December 2016.

E-customs

Since early 2014, CER has been advocating the development of a new rail simplified procedure for customs declarations based on the new Union Customs Code and the information of the E-Consignment Note.

In 2016, a task force consisting of CER members, the national customs authorities and DG TAXUD was set up in order to analyse the possibility of creating this new system in parallel with New Computerised Transit System (NCTS) for rail. So far, the task force is making good progress in defining the blueprint, and CER is confident that a final result can be achieved by 2018.

EU implementing acts on trucks' weights and dimensions

Following the EU's adoption of the revised version of Directive 96/53 on weights and dimensions of lorries, CER closely followed the European Commission's work on the implementation of the provisions of this Directive, in particular in the area of compatibility of new aerodynamic devices with rail freight wagons. This activity is steered by:

- DG MOVE, with the preparation of an implementing act on the condition of use for aerodynamic devices attached to the rear of lorries, trailers and semi-trailers;
- DG GROW, with the revision of Regulation 1230/2012 on type-approval requirements for the masses and dimensions of vehicles and their trailers.

Both acts have yet to be adopted by the Member States in their respective technical committees. CER has been carefully monitoring the discussions, in particular in DG GROW's Working Group on Motor Vehicles (MVWG). The key objective for CER is to make sure that the spirit of the revised Directive 96/53, i.e. ensuring full compatibility of all trucks and trailers with combined transport operations, is maintained in the implementing phase.

Rail freight noise

The rail noise problem is limited in scope, not only in terms of specific countries but even specific areas within these countries. While the effect of excessive noise can be considered as local, the same cannot be said for the source of the problem. Today about 50% of rail freight transport is international

and the current EU policies aim to increase its volumes further. This means that a large number of wagons run across borders and the noise they emit is therefore a European issue.

Rail freight noise remains therefore a top priority topic for CER. The EU Agency for Railways is currently assessing the impact of the Noise TSI scope extension to existing wagons. There is a need for measures that would allow specific noise-related rules in noise-sensitive areas while retaining flexibility in the areas that are less sensitive to noise and where cast-iron-block-equipped wagons could still be operated.

The sector is committed to retrofitting on condition that sufficient funding is available. Full subsidies for retrofitting and higher maintenance costs represent the simplest and most effective approach to tackle this challenge.

3.3 Developing rail infrastructure

Over the past 18 months, there have been a number of important initiatives at sector level aimed at improving the development of rail freight corridors and bolstering infrastructure investments, for the benefit of all customers.

Strengthening the development of corridors

In mid-2015, the European Commission announced its intention of potentially reviewing Regulation 913/2010 concerning a European rail network for competitive freight. In view of this prospective review, CER, EIM, and the nine Rail Freight Corridors (RFCs) jointly prepared a sector input paper on the Rail Freight Corridors, focusing on creating harmonised approaches and unified services for the customers. This paper was handed over to the European Commission on the occasion of the Rail Freight Day on 4 December 2015 in Vienna.

In early 2016, the Dutch Presidency brought together the rail sector, its customers and the RFCs, to develop a joint declaration on the steps to be taken by the sector in order to improve rail freight transport in Europe.

The final product, the Corridor Sector Statement, was presented by the signatory associations – CER, CLECAT, EIM, ERFA, ERTMS Users Group, ESC, RNE, UIP, UIRR, and UNIFE – and supported by the Rail Freight Corridors, on the occasion of the TEN-T Days in Rotterdam on 21 June 2016. In the Statement, the sector commits itself to the aim of enhancing the competitiveness of the Rail Freight Corridors for the benefit of all customers, and to improve the quality, reliability and efficiency of transporting goods by rail across Europe. The Sector Statement reflects the common will and engagement of the rail sector to boost international rail freight.



In order to push ahead with the commitments, the participating associations, together with the strong support of the RFCs, drew up an action list based on the commitments outlined in the Corridor Sector Statement. A number of priority topics were discussed at the Rail Freight Day on 9 December 2016 in the presence of the European Commission.

In the meantime, the European Commission launched a public consultation on the evaluation of Regulation 913/2010 in June 2016. CER coordinated a response to the public consultation in July 2016, outlining that the rail sector has already started developing market-oriented solutions for those corridor aspects which need improvement – including governance, product definition, operational provisions, investment planning and terminals – and is still in the process of further developing these solutions. The results of the consultation, expected in late 2016 or early 2017, together with the initiatives of the sector, will determine whether the European Commission will carry out an impact assessment of the Regulation, potentially followed by a proposal for a review of Regulation 913/2010 towards the end of next year.





Investing in rail infrastructure

The current review of the Multiannual Financial Framework (MFF), the EU's budget for a 7-year period, confirms that the EU is adopting a more systemic use of innovative financing as a means to leverage scarce EU resources.

Under the current MFF proposal, the European Commission identified a number of successful programmes and instruments which it would like to reinforce with additional financial means. For the period 2017-2020, the Commission proposes to supplement the original allocation of Horizon 2020 by EUR 400 million, to double the financing capacity of the European Fund for Strategic Investments (EFSI), and to make available an additional EUR 1.4 billion for CEF transport grants, of which some will need to be blended with EFSI financing. The aim of this 'blending', which combines CEF grants with private financing, is to increase the economic and financial viability of projects, thereby making certain projects more attractive to private investors. The European Commission launched a 'CEF blending call' in November 2016 with a one-year deadline for submission.

Together with other transport associations, CER discussed the Commission proposal for the midterm review of the MFF and agreed to work on a common lobbying approach for the benefit of the transport sector.

The European Fund for Strategic Investments (EFSI) is managed by the European Investment Bank, and accompanied by

- the European Investment Project Portal, which has published more than 100 investment projects since its launch on 1 June 2016;
- the European Investment Advisory Hub. The hub has until now dealt with 230 requests from 27 Member States.

EU-China Connectivity Platform

On 28 September 2015, the European Union and China signed a Memorandum of Understanding setting up a 'connectivity platform' which looks at trans-national infrastructure investments and transport service improvements in all regions and countries linking China to Europe. The platform aims to coordinate the infrastructure policy of both the EU and China in the context of the TEN-T policy and the Silk Road/One-Belt-One-Road initiative respectively.

CER supports such a platform in view of improving the coordination of both Chinese and EU infrastructure policy and enhancing the Eurasian land bridge. CER regularly participates in DG MOVE stakeholder meetings on this topic and feeds into the preparatory discussions of the EU-China Connectivity Platform.

3.4 CER technical activities

With the Technical Pillar of the Fourth Railway Package entering into force, the European Union Agency for Railways (The Agency) will be responsible for issuing safety certification and for granting vehicle authorisation. The Commission, the Agency, CER and its experts as well as other rail stakeholders have been working on the details of these processes allowing a sound implementation by 2019.

Fourth Railway Package Technical Pillar - implementation

The Technical Pillar is the most revolutionary part of the Fourth Railway Package. It fundamentally streamlines the processes of vehicle authorisation and safety certification by giving the European Union Agency for Railways (the Agency) a central role and making the processes more efficient, less costly, quicker and less subject to national interests.

The Fourth Railway Package's Technical Pillar comprising the ERA Regulation (2016/796), the Interoperability Directive (2016/797)

and the Rail Safety Directive (2016/798) legally entered into force on 15 June 2016.

With the Technical Pillar, the Agency will be responsible for issuing safety certification, necessary for railway undertakings to provide rail services, and for granting vehicle authorisation to ensure that in future railway vehicles can be put on the market faster and at a lesser cost than before. In order to make the issuing of single safety certificates and vehicle authorisations more efficient and impartial, the Agency was assigned a central role as a one-stop-shop. The Commission, the Agency, CER and its experts as well as other rail stakeholders have been working on the details of these processes allowing for a sound implementation in 2019.



Vehicle authorisation

With the new Interoperability Directive the responsibilities for placing on the market and the use of vehicles are clearly divided between the actors. A vehicle can only be placed on the market by the applicant (for the initial authorisation generally a train manufacturer) after having received the vehicle authorisation for placing on the market issued by the EU Agency for Railways. Before a railway undertaking can use a vehicle in the area of use specified in the authorisation for placing on the market, it needs to check that the vehicle is compatible with the route on the basis of the infrastructure register and that the vehicle is properly integrated in the composition of the train where it is intended to operate, taking into account its safety management system. These processes have been defined, discussed and fine-tuned in regular workshops throughout 2016. CER underlined the underpinning principles that vehicle authorisation must be faster, more transparent and more efficient compared to today's situation.

Safety certification

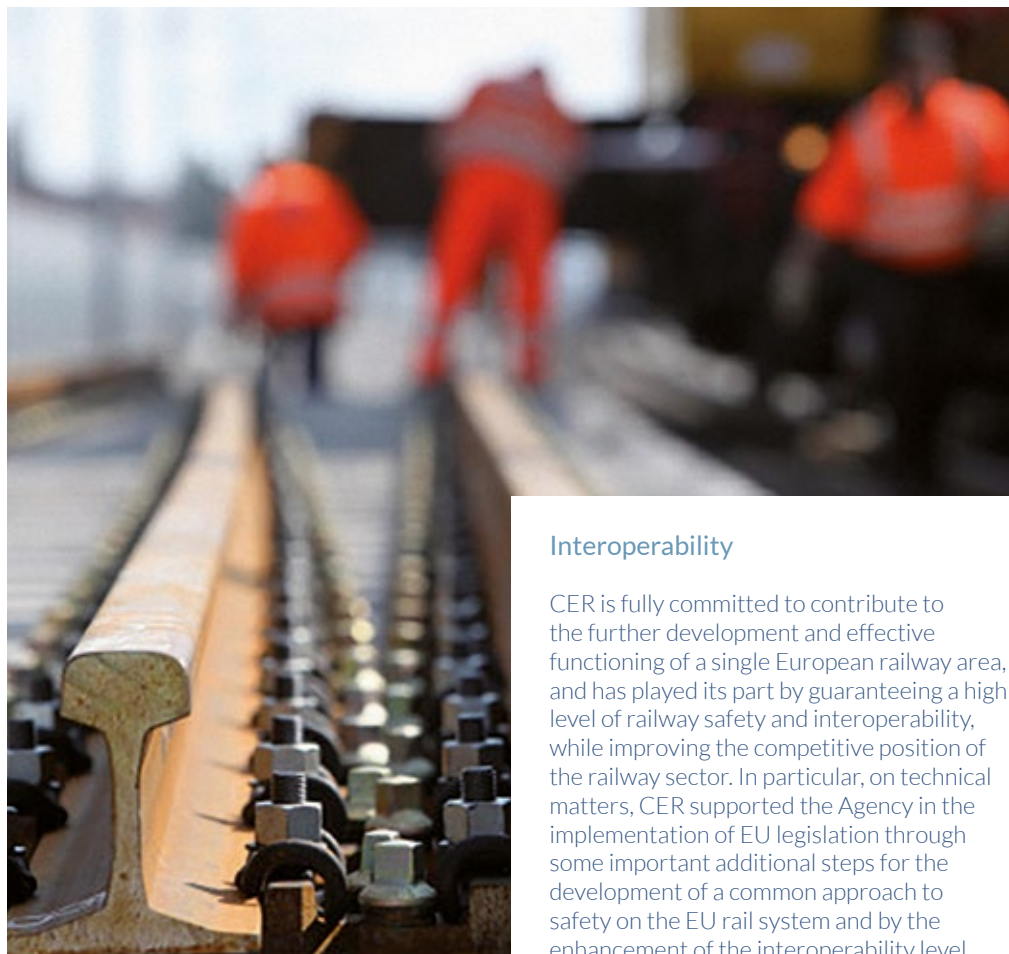
The new Rail Safety Directive defines that access to the railway infrastructure will only be granted to railway undertakings holding the single safety certificate issued by the Agency. The purpose of the single safety certificate is to provide evidence that the railway undertaking has established its safety management system and that it is able to operate safely in the intended area of operation.

In the field of safety, the European Union Agency for Railways, CER and the other stakeholders have been developing and improving the technical specifications for interoperability (TSI), the common safety targets (CST), the common safety methods (CSM) and the common safety indicators (CSI). They will continue this work with the target of harmonising the European railway system and further shaping a common approach to safety including safety culture and human factor management.

One railway authority in Europe

In order to streamline the decision-making process within the Agency and to contribute to enhancing efficiency and effectiveness, a two-level governance structure was introduced. To that end, the Member States and the Commission are represented on the Management Board vested with the necessary powers, including the power to establish the budget and approve the programming document. The sector representatives including CER are invited to the Management Board of the Agency as observers without the right to vote. A smaller Executive Board was set up with the task of preparing the meetings of the Management Board in an appropriate manner and supporting its decision-making process. CER and UNIFE have been attending alternately.

In order to actively shape the new European Union Agency for Railways, CER took part in the discussions about the new Boards of Appeal to be set up and the approach to fees and charges.



Interoperability

CER is fully committed to contribute to the further development and effective functioning of a single European railway area, and has played its part by guaranteeing a high level of railway safety and interoperability, while improving the competitive position of the railway sector. In particular, on technical matters, CER supported the Agency in the implementation of EU legislation through some important additional steps for the development of a common approach to safety on the EU rail system and by the enhancement of the interoperability level.

CER Technical Monitor

The monthly CER Technical Monitor provides the complete overview about all technical activities including the implementation of the Fourth Railway Package's Technical Pillar, the Network of Representative Bodies and the work of the Group of Representative Bodies. In addition it provides an overview of the circa 1,500 experts actively following or observing CER activities in the technical domain.



Safety

In addition to the work done to shape a single safety certification process and to develop the related certification framework, the Agency is currently developing solutions for a better exchange of information between railway actors. The Agency's ambition in 2016 was to explore the solution to share more information on common occurrence leading to safety-related findings. CER actively contributed to the definition of such systems and pushed towards defining clear conditions of use that will avoid administrative burdens and any impact on responsibilities and liabilities.

In the context of the Joint Network Secretariat (JNS), an Agency platform allowing discussion with the National Safety Authorities (NSAs) and the sector on safety and interoperability issues, CER has been driving the debate on the responsibilities for railway undertakings when operating in the framework of cooperation agreements. A deal was reached between the Agency, the NSAs and the other involved stakeholders on the distribution of responsibilities under the Safety Directive.

ERTMS

A new release of ERTMS specifications was agreed by the Railway Interoperability and Safety Committee (RISC) in February 2016. Intense work is being performed to update the European deployment plan and to investigate business cases. First discussions are now being organised on how to shape the longer-term evolution of the ERTMS system and bring new added-value while reducing its cost.

The implementation of the ERTMS assessment in the Fourth Railway Package is underway, giving a role to the Agency in the authorisations of track-side and on-board installations. Having adequate processes is vital both now and in the future to ensure compatibility and conformity, thus guaranteeing a successful ERTMS deployment.

ERTMS is a cornerstone of rail digitalisation. Exploring its benefits is a key need and challenge for making railways more efficient. (see also page 48).

Simplified access for customers

In order to facilitate a simplified access to the railway system – including distribution interfaces – CER, in collaboration with the Agency and the European Commission, made a significant contribution to the evolution of



On 20 September, the chief executives of DB, FSI and SNCF signed an agreement to set up a new governance structure for the TAP TSI. The TAP TSI Services Governance Association (TSGA) is intended to organise the central regulatory services that are needed to comply with the timetable, tariff and other data provisions of the Regulation.

the TAP TSI Regulation (technical specifications for interoperability related to telematics applications for passenger services). CER supported the Agency's goal of becoming the 'telematics applications system authority', as well as its work to maintain and further develop the TAP TSI technical documents on timetables and tariff data, among others, and to lead and monitor the Member States in the implementation of the telematics TSIs. This process is expected to lead to an implementation of the remaining TAF/TAP functions among the actors as from 2017. On top of this, the sector has developed the FSM (Full Service Model), which will enable passenger operators and ticket vendors to sell and to combine railway offers and thus improve customer experience.

CER also supported railway companies in understanding and efficiently applying this access framework for implementation and deployment.

Interoperability Registers

The so-called 'Interoperability Registers' are designed to meet the needs of railway undertakings among other stakeholders, e.g. to check the compatibility of trains with different routes. The following registers facilitate this process by making the relevant infrastructure and vehicle-related data available:

- Register of Infrastructure (RINF) (expected to be completed by 2019)
- European Centralised Virtual Vehicle Register (ECVVR)
- European Register of Authorised Types of Vehicles (ERATV)
- Vehicle Keeper Marking Register (VKMR)

CER contributed to the continuous improvement of the registers and supported the Members in their implementation and rationalisation. Furthermore, CER in collaboration with the Agency and other stakeholders worked on the consolidation of the registers into an integrated system taking into account the provisions of the Fourth Railway Package.

Standardisation

CER signed the *Joint Initiative on Standardisation* and expressed its support for jointly working towards a modernised European Standardisation System. The *Joint Initiative on Standardisation* brings together public and private organisations in a collaborative, transparent and agile dialogue process to ensure the timely development of state-of-the-art standards in support of fast-changing market needs and public policies. The Joint Initiative on Standardisation with its Editorial Committee has been intensively working in 2016 on defining key principles (such as transparency, shorter time to market and better end-user involvement). The modernisation of the standardisation system

was announced in the Single Market Strategy and complements the *Communication on ICT Standardisation Priorities for the Digital Single Market* adopted in April 2016.

CER is an active member of the CEN/CENELEC/ETSI Sector Forum Rail with its mission to coordinate, plan, programme, promote and facilitate the production and use of European Standards for the benefit of the sector in Europe and to prepare railway standardisation policies for the technical boards.

CER and UIC regularly exchange opinions on standardisation matters and either coordinate common approaches or approaches in the realms of their respective responsibilities if applicable.

Research and Shift2Rail

Shift2Rail is a European rail joint technology initiative to seek focused research and innovation (R&I) and market-driven solutions by accelerating the integration of new and advanced technologies into innovative rail product solutions. CER has been channelling the rail operators' experience to the Joint Undertaking through the User Requirements and Implementation and Deployment Group. In the framework of the European Rail Research Advisory Council (ERRAC) and the Foster Rail project, CER contributed to the drafting of the Foster Rail roadmaps based on the Strategic Rail Research Innovation



The Technology and Innovation Roadmaps were presented at the Foster Rail final event in April 2016

Agenda (SRRIA). Through this SRRIA, ERRAC reaffirms Europe's need to offer a well-balanced, business-led and strong programme of research and innovation for the railway system over the next decades.

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The Group of Representative Bodies (GRB)

The Group of Representative Bodies (GRB) is a grouping of railway associations in Europe which has the role of supporting, in a transverse way, the rail sector's input to the EU Agency for Railways' work programme and its effect on safety and interoperability.

Furthermore it plays a role in developing the activities associated with research, innovation and standardisation and therefore has links with European standardisation and research bodies and processes.

GRB is formed by the associations that are named as 'Representative Bodies', comprising the companies making up the railway operating community and the supply and manufacturing industry. Together these companies are responsible for the design, construction, operation and maintenance of the railway system.

CER holds the office of the GRB secretariat and is responsible for chairing the GRB Core Group meetings, supporting the GRB chair for the GRB Plenary sessions and kicking off major work items.



EU Agency for Railways Executive Director Josef Doppelbauer (left) and moderator Andy Doherty (Network Rail) speaking at a discussion round organised by the GRB in June 2015.

4

Core activities

- 4.1 The railroad to digitalisation
- 4.2 The railways' perspective on security
- 4.3 Decarbonisation: the rail sector contribution
- 4.4 Social affairs: railways as an employer





Photo: fotolia.com

4.1 The railroad to digitalisation

Digitalisation is not an unknown concept for railways. As one of the top priorities for the rail sector and its future, digitalisation will foster the rail sector's attractiveness and competitiveness.

In May 2015, the Commission published *A Digital Single Market Strategy for Europe*, which includes a number of initiatives to be delivered by the end of 2016. CER has closely followed the Commission's initiatives and policy developments under this digital agenda for Europe, among others the connectivity package and the foreseen proposal on free flow of data.

Digitalisation is an opportunity to maintain a strong market position in Europe. In order to contribute to the debate, both at the policy and sector level, CER, CIT, EIM and UIC devised a joint view on the opportunities and challenges presented by digitalisation. The resulting *Roadmap for Digital Railways* aims to create synergies between all the ongoing activities in the field of digital railways, to promote different digital rail initiatives and to propose some further actions that could be adopted at European level in order to foster the digitalisation of railways.

The roadmap for digital railways

In addition to digital initiatives at national and international level, in *A Roadmap for Digital Railways*, the sector stresses a number of areas – connectivity, customer experience, internet of things, automatic train operations and open data – where collective action is needed to deliver on the objective of making railways digital.

Connected railways

The main objective is to increase the access to internet and to provide connectivity across the entire rail network. This however requires highly available, reliable and stable network connectivity, while meeting



ERTMS

ERTMS is a vital element of the rail system and has the potential to become the backbone of European digital railways by providing advanced functionalities enabling the digitalisation of infrastructure components (e.g. ERTMS level 3, satellite integration). This will also pave the way for more automation in railways. Due to the obsolescence of GSM-R technology, ERTMS will also have to look at new radio communication that should enable reliable, high-quality communication between the train and traffic management centre, thus enhancing operational performance and safety.

In 2016, a comprehensive policy framework for ERTMS was agreed and published. The new TSI proposes sufficient specification for a large-scale deployment enabling a long period of stability before new evolution will become necessary. It also includes a long-term vision for ERTMS bringing more value for operations. In addition, a business case for ERTMS on the 9 Core Network Corridors was prepared, serving as a tool for the deployment programme to facilitate operations and to optimise ERTMS investment on a European scale. Moreover, on 20 September 2016, the European Commission, the EU Agency for Railways, and the rail sector organisations (including CER) signed a landmark Memorandum of Understanding for ERTMS formalising high-level objectives and principles supporting ERTMS deployment in Europe.

the technical, operational and functional requirements of the railway system. This includes coverage in tunnels, protection of GSM-R and the ERTMS installations, and avoiding or mitigating any form of interference, local restrictions and cyber-threats.

Connectivity is key in order to provide dependable information, such as train schedules, availability of tickets, travel planners, etc.

Customer experience

Digital tools need to address individual requirements by creating door-to-door solutions. This will enhance customer experience by offering increased added value before, during and after travel.

The Full Service Model (FSM) initiative is a good example. It brings together interested railways and ticket vendors with the aim of improving customers' travelling experience by enabling better access to available rail offers for passengers around Europe. (see also page 34).

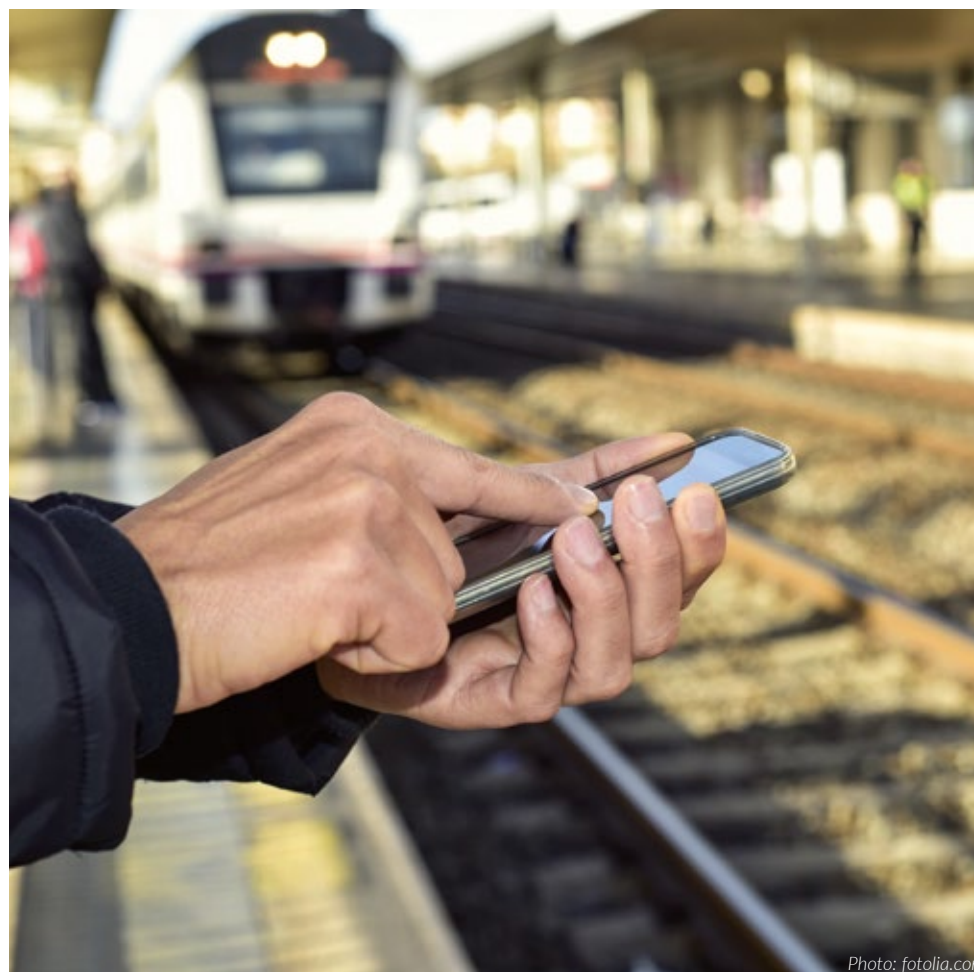


Photo: fotolia.com

Increased capacity

The internet of things and automatic train operations represent a huge opportunity for further transformation of railways by increasing their capacity, efficiency and performance. Beyond this, the greater deployment of different tools will improve the quality of services and safety and optimise costs and energy consumption. The implementation of automatic train operations brings all these benefits and will drive the development of seamless and interoperable railways in Europe.

Transport data

The different aspects of opening up data and data sharing need to be better explored in order to create clear added-value for the rail sector and the society. The first step is to ensure interoperability of data formats and to develop joint interfaces in order to enable data exchange between different systems. In addition, a level playing field with the private sector has to be ensured.

With regard to the provision of EU-wide multimodal travel information services under the ITS Directive (2010/40/EU), CER promoted the use of license agreements for exchanging data between data owners and users (see also page 34).

4.2 The railways' perspective on security

Due to the changes in the international security environment over in recent years, terrorism has become a major challenge facing Europe and rail transport. Tackling it requires a holistic, proportionate and coordinated approach.

The thwarted terrorist attack on a Thalys train on 21 August 2015 led to robust discussions at national and European level with regard to rail security. Public pressure has been significant not only on the European Commission and Member States but also on railway companies to take appropriate action in response to the incident.

CER principles

Security and protection of rail passengers is an unquestionable priority for the members of CER. Hence, CER has continuously and actively participated in the discussions at EU level with regard to possible policy developments of European measures on terrorism and rail security. CER has shared and represented the view of the railway sector on these issues. In order to even better contribute to the political discussions on this matter, CER published an updated position



paper on rail security in February 2016, reflecting the railways' standpoint.

Railways are in no doubt about their responsibility and take the task of continuous improvement of their security management systems very seriously. As mass public transport operators, railways have to be prepared for the future and think about new ways to increase the security of the rail system while at the same time safeguarding

its flexibility. However, railways are an open-access transport mode and cannot be protected entirely from all potential threats. Airport-style security measures are not an option and a more flexible approach enabling a quick response to evolving threats is crucial, taking into account national and regional differences.

For European railway transport, the development of inappropriate measures may

create new risks to security or shift the risks from one area to another. Furthermore, such measures may lead to practical difficulties and a loss of rail competitiveness, shifting rail passengers to other modes of transport and resulting in an overall decrease in transport safety.

Proper analysis, requiring a holistic, proportionate and coordinated approach, is therefore needed before proposing any possible measures. This will create a clear added-value and reassure the public on the overall security. Further enhanced international coordination and cooperation among police and security services and a better exchange of data and intelligence at national and European level are necessary in order to deal with terrorism and other security-related risks in a more efficient and effective way.

CER and its members are relying on EU policymakers to reflect carefully on these concerns and respond with appropriate actions, with a view to ensuring that no disproportionate measures are envisaged in the field of rail transport. Rail customers expect the railway services to be not only safe and secure but also functional and reliable.



Photo: fotolia.com

In the hands of European and national politics

After the Thalys incident, the Commission and the Member States organised several meetings and events on terrorism discussing what common European approach could be taken on rail security.

The main fear for the sector is that measures proposed to prevent and respond to security incidents might be disproportionate and inadequate. It is important to understand that high-speed and international lines are fully integrated in the whole railway system and subject to the same threat level as conventional and national lines. Therefore, the issue should be to prevent terrorists from simply shifting their focus from one area to another. Also any measures introduced need to be holistic and considered from the wider public security point of view while enabling travellers' free movement. What is needed is a common EU-level approach where a clear added value for the security of transport as a whole can be demonstrated.

Despite the international nature of terrorism and other criminal activities, which require a coordinated approach at the European level, different Member States - solely responsible for ensuring internal security - have

introduced special national measures. This has led to a restriction of free movement of people and involuntarily forced passengers to partly switch from public transport to private cars. As a result, certain international rail passenger lines have been impacted, putting them at a disadvantage compared to other services. This clearly goes against the objective of the Commission's White Paper on Transport, aimed at generating a shift from road to rail. Moreover, this moves the risk of a terrorist attack to another target instead of mitigating it.

In general and while taking into account national differences, Member States should be called upon to favour more proportionate measures, relying on risk and threat assessment and preserving the essential functions of railways as an open-access transport mode. Furthermore, Member States need to share the information of their intelligence services in a more permanent and consistent manner as security authorities play a central role and are decisive for security as a whole.

4.3 Decarbonisation: the rail sector contribution

Significant reductions in greenhouse gas emissions from transport are required if the EU is to achieve its long-term goals from the 2011 Transport White Paper. Rail is key to decarbonising transport.

Low-emission mobility

In December 2015, the first-ever universal, legally binding, global climate agreement was signed by 195 countries in Paris. The first major economy to submit its contribution to the new agreement, the EU, remained a global leader in climate diplomacy during the negotiations. It is now taking legislative steps to implement its economy-wide target to reduce greenhouse gas (GHG) emissions by at least 40% by 2030 compared to 1990.

Europe's economies have demonstrated that economic growth can be achieved without GHG emission increases. However, the annual EU emission inventory, released in June 2016 by the European Environment Agency, concluded that transport is now the single exception to that fact in Europe, with GHG emissions still rising.

In July 2016, the European Commission adopted A *European Strategy for Low-*

Emission Mobility, which points out that all transport sectors need to contribute towards reducing the EU's GHG emissions and air pollutants. Decarbonising transport thus remains both a challenge and an opportunity for European policymakers, and low-carbon transport modes such as rail can play a big role in effectively reducing GHG emissions.

CER published a position paper together with UNIFE, inviting policymakers to pursue a win-win strategy by linking climate, energy and transport policies: shifting more transport to rail will lead to transport decarbonisation as well as increased energy security.

Rail Transport and Environment: Facts & Figures

With the aim of supporting decision makers, CER together with UIC published a booklet with comprehensive data on the environmental impact of the different transport modes.



CER considers the following actions as vital to decarbonise transport:

- Confirm in legislation the 60% reduction target for transport emissions by 2050 compared to 1990 levels (Transport White Paper 2011), with an additional binding target for transport in 2030.
- Develop a reporting mechanism for Member States to monitor and facilitate their progress in reducing transport emissions. Annual reports should be published so as to incentivise Member States to achieve progress.
- Where carbon savings and the economic case for a project are positive, further electrify and upgrade the rail network (regional as well as main lines), as electrified railway transport is by far the most efficient form of e-mobility.
- Promote rail as the backbone of sustainable mobility and its interconnectivity with other low-carbon modes, e.g. with bicycle sharing and parking facilities at railway stations.
- Support the development and market introduction of energy-efficient solutions and new vehicle concepts like hybrid locomotives and battery-operated vehicles for short sections of track where electrification is not viable.
- Encourage the use of electric transportation by fair framework conditions for competing transport modes.
- Continue and intensify support to rail research and innovation.





Photo: fotolia.com

EU ETS

Europe's Emission Trading System (ETS) - the world's first and largest carbon market - is being revised with the aim of delivering GHG emission reductions for the period 2020-2030. As a major user of electricity, rail is indirectly covered by the ETS, whereas aviation is covered by 15% only and road not at all. CER has therefore published a factsheet to back up its recommendation to compensate rail for its indirect ETS costs, for the sake of fair carbon pricing across all transport modes.

EU ETS reform - remove competitive distortion amongst transport modes

The Emission Trading System (ETS) in a nutshell
Carbon pricing imposes a cost on industrial production, firms in cost emissions, in order to reduce their costs.

ETS sectors:
Energy intensive industry
Power and heat
Commercial aviation within the EEA, but airlines receive 85% of allowances free.

Reform:
The world's first and largest GHG trading system is currently being revised with the aim of delivering a GHG reduction of at least 40% by 2030 compared to 1990 levels.

How does it work?
Leftover allowances for sale
Even CO₂
TRADE
Allowances
Money

Rail is an indirect ETS sector
Approximately 55% of railway energy in Europe is electricity.
55%
These three countries (DE, FR, IT) transport around 80% of Europe's freight.
80%
EU railway companies are amongst the major users of electricity.
Annual electricity consumption for railway traction services corresponds to €2.2 billion.
According to the International Energy Agency (IEA) 40% of the electricity used by railways in Europe is low-carbon.
40%

Message to the policymakers

CER recommendations

- Unlike more CO₂ intensive modes rail is penalised by environment-related charges.
- has a negative effect on rail's competitiveness in Europe consistent with EU policy.
- The current competitive distortion amongst transport modes caused by carbon pricing must therefore be removed.
- A balanced carbon pricing policy across all transport modes must be achieved.
- Until then, a level playing field amongst transport modes can only be expected if railways are fully compensated for their indirect ETS charges.

The ETS generates huge costs for electrified rail
The EU rail sector today pays over €110 million/year for its CO₂ emissions generated by electric traction. According to the new ETS proposal, railway companies might reach a level of €370 million/year.
Annual European Emission Allowance (EUA) costs for railways in million €

Electric rail is fully included in the ETS
100%
15%
0%

CER events on low-emission mobility

On 12 October 2016 in Vienna, CER organised a policy session on low-emission mobility in Europe. Key actors from the European Commission, the European Environment Agency and the railway sector were brought together for a panel discussion.

The contribution of rail to low-emission mobility was further discussed at the political event organised by CER together with the Slovak Presidency of the Council of the EU on 28 November 2016. The high-level panel debated GHG targets, the environmental commitment of the European railways, the EU strategy and actions.

The rail sector commitment

In 2008 the railway sector adopted voluntary sustainable mobility targets, including a CO₂ emission reduction commitment with targets for reducing specific and total emissions, baseline year 1990 - horizon 2020 and 2030.

Following a decade of strong performance, in 2015 the sector agreed to an even greater level of ambition for reducing CO₂ emissions.

Updated targets:

- 40% reduction in CO₂ passenger-km and tonne-km (by 2020)
- 50% reduction in CO₂ passenger-km and tonne-km (by 2030)
- 30% reduction in total CO₂ for passenger and freight (by 2030)

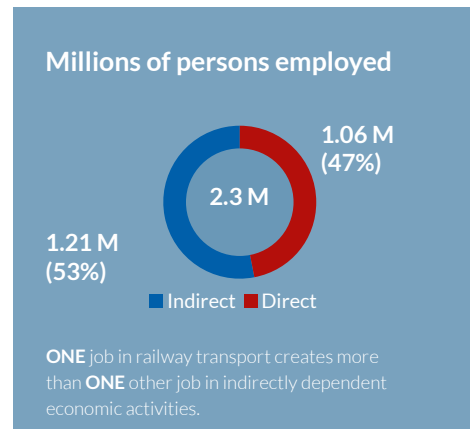
4.4 Social affairs: railways as an employer

A qualified workforce, fair recruitment measures, good working conditions and gender equality contribute to the quality of the railway business. CER addresses social issues both internally and with employees' representatives in the EU social dialogue.

The railway sector provides more than 1 million direct jobs in Europe. On the national level, railway companies are among the biggest employers, delivering a wide professional offer, as well as training and qualification schemes for their staff. The sector is nonetheless confronted with labour shortages and an ageing workforce.

CER members exchange and agree on common positions around social affairs issues within the Human Resources Directors Group. Another dimension they are active on is the dialogue and cooperation with employees' and trade unions' representatives in the context of the Sectoral Social Dialogue for Railways.

European decision makers can support rail companies in this field through targeted initiatives within the scope of the EU's competences in the transport and social



Source: The Economic Footprint of Railways in Europe, Ecorys, 2014

spheres. Action at EU level is in particular necessary to harmonise procedures and conditions of workers' cross-border mobility, to cut red tape, as well as to continue and step up the promotion of the European sectoral social dialogue.

Human Resources Directors Group

The remit of the Human Resources Directors Group (HRD) is to define CER's position with regard to HR and social issues. In December 2015, the HRD Group agreed on a new organisational structure that includes the creation of two subordinated Working Groups (WG): the WG on HR policies and the WG on social dialogue.



The HR Policies WG deals with subjects of common interest, such as recruitment, social standards, protection of staff, diversity, safety, and benchmarking, and develops the CER position on HR issues.

The Social Dialogue WG prepares the CER input in view of joint activities with the employees' representatives, in particular in the framework of the European Sectoral Social Dialogue Committee (see below).

EU Social Dialogue

Since the start of his mandate, European Commission President Jean-Claude Juncker has acknowledged and promoted the role of social dialogue with the initiative *A New Start for Social Dialogue*.

New start for social dialogue

In March 2015 the Commission launched the key initiative *A New Start for Social Dialogue*, aimed at analysing the features and added-value of social partners' involvement in policymaking at different levels, and at assessing national social partners' needs in terms of capacity-building as well as adequate resources and structures at European level. The initiative and its themes were the basis for one-year-long discussions among cross-industry social partners, the Commission and the Council that led to the adoption in June 2016 of a 'quadrupartite statement' containing a list of action points for all the involved actors.

Social dialogue at EU level takes place at both cross-industry and sectoral level, with the latter counting more than 40 committees devoted to the different economic sectors.

CER is a recognised social partner in the European Sectoral Social Dialogue for Railways, in which context it interacts with its workforce counterpart: the European Transport Workers' Federation (ETF). The cooperation between the rail social partners and their members takes different forms, from the exchange in the context of the social dialogue committee, to the definition of joint positions and declarations on topics

Rail Sectoral Social Dialogue Committee

The Rail Sectoral Social Dialogue Committee gathers the associations representing railway employers (CER, EIM) and employees (ETF), i.e. the rail social partners. The Committee meets three times a year, twice in working group format, and once in the plenary setting. Participants discuss the social aspects of EU rail transport policy, meet with EU institution representatives, decide on the Committee's priorities and monitor the progress of ongoing joint activities.



Healthy Workplaces for All Ages campaign

In October 2016, CER became an official partner of the Healthy Workplaces for All Ages campaign, run by the EU Agency for Occupational Safety and Health (EU-OSHA). The campaign aims at raising awareness and spreading EU-OSHA's messages promoting a sustainable working life, starting from the early steps in one's career until retirement age.

of common interest, as well as the close cooperation during joint projects such as the one on 'Promoting employment and attractive working conditions in the European rail sector', which came to an end in 2016.

The rail social partners are also committed to monitoring the progress on selected topics that they addressed together within joint projects and recommendations. This is the case of the annual Women in Rail Reports, as well as the ad hoc stocktaking exercise on the implementation of the social partners' recommendations *Promoting security and the feeling of security vis-à-vis third-party violence in the European railway sector*.

Employment in Rail project

In order to analyse the assets and potentials of the rail sector as an employer, CER and ETF ran the joint project 'Promoting employment and attractive working conditions in the European rail sector' (2014-2016). The project analysed the following aspects: image and attractiveness of working places in the European railway sector; employment perspectives and strategies in European railway companies; sustainable working conditions, personnel development and retention measures.

Rail Freight Declaration

CER and ETF agreed on a joint Rail Freight Declaration in order to voice common concerns with regard to the situation of rail freight transport in the EU and its impact on employment. The Declaration includes proposals for measures to be adopted as part of a fairness and growth plan for rail freight in Europe. The Declaration was signed and presented at the European Rail Freight Day in Vienna on 4 December 2015.



From left to right: CER Executive Director Libor Lochman, ETF Deputy General Secretary Sabine Trier, Vice-President and President of the European Sectoral Social Dialogue for Railways Guy Greivelding (ETF) and Matthias Rohmann (CER)

5

CER governance

- 5.1 CER Management Committee
- 5.2 How does CER work?
- 5.3 CER member statistics





Photo: fotolia.com

5.1 CER Management Committee



CER Chairman
Rüdiger Grube
Deutsche Bahn (DB)



Christian Kern
CER Chairman (2013-May 2016)
Austrian Federal Railways (ÖBB)



Andreas Meyer
CER Acting Chairman
(May 2016-September 2016)
Schweizerische
Bundesbahnen / Chemins
de Fer Fédéraux Suisses /
Ferrovie Federali Svizzere
(SBB/CFF/FFS)



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



Vice-Chairman
Guillaume Pepy
Société Nationale des
Chemins de Fer Français
(SNCF)



Member
Rober Cobbe
Rail Delivery Group
(RDG)



Member
Jo Cornu
Société Nationale des
Chemins de fer Belges
(SNCB)



Member
Ilona Dávid
Magyar Államvasutak
(MÁV)



Member
Crister Fritzson
Association of Swedish
Train Operating
Companies (ASTOC)



Member
Pavel Krtek
České Dráhy (ČD)



Member
Renato Mazzoncini
Ferrovie dello Stato Italiane
(FS Italiane)



Member
Dušan Mes
Slovenske Železnice (SŽ)



Member
Miroslaw Pawłowski
Polskie Koleje Państwowe
(PKP)



Member
Pablo Vázquez Vega
Renfe Operadora (Renfe)



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



Member
Oliver Wolff
Verband Deutscher
Verkehrsunternehmen
(VDV)



Associated Member
Bernard Guillemon
BLS AG (BLS)



Associated Member
Manuel Queiró
Comboios de Portugal (CP)

5.2 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 Chairman, four Vice-Chairmen 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.

In addition to 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):

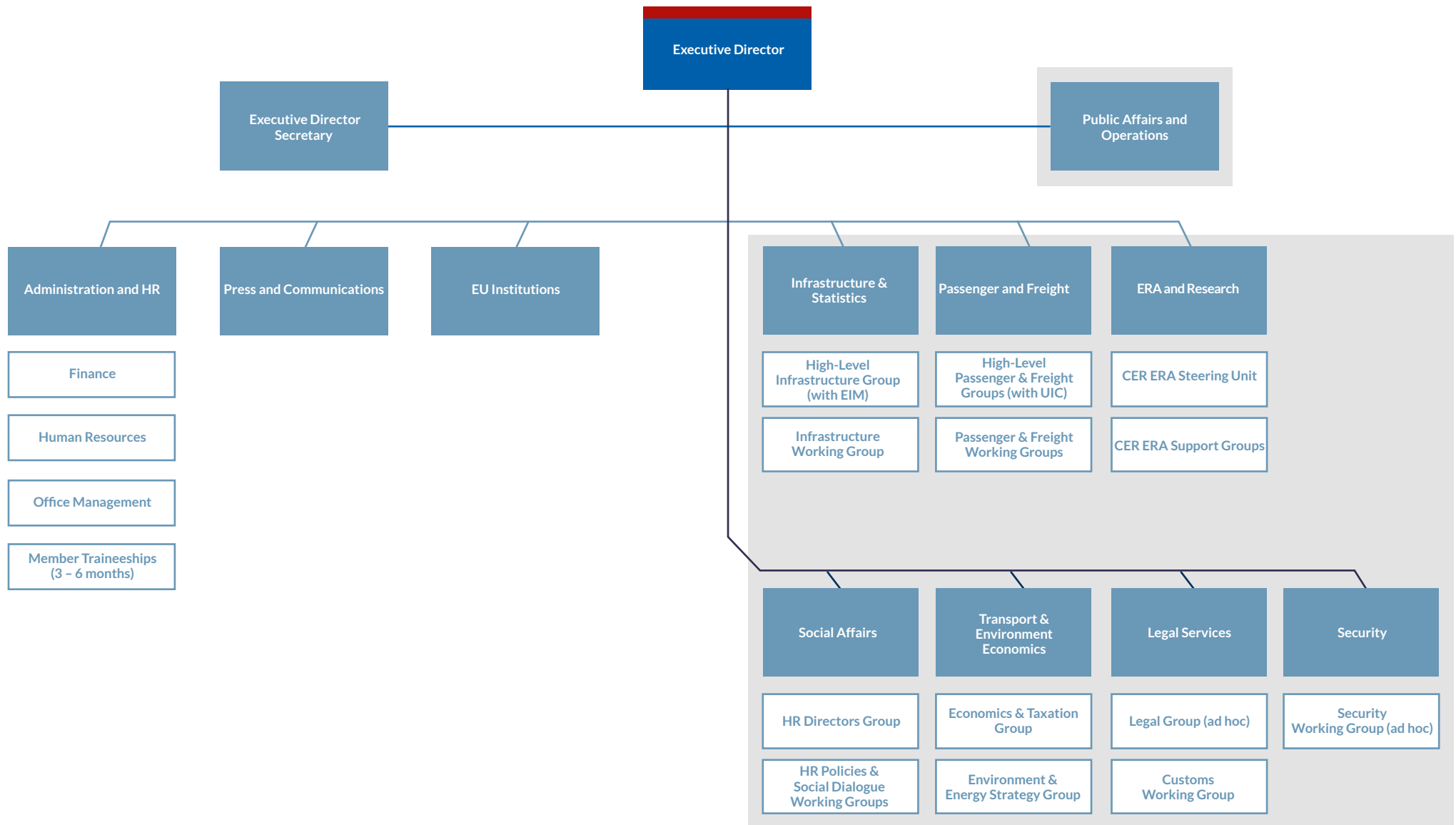
- Customer Liaison Group
- Customs Working Group
- Economics and Taxation Group
- Environment and Energy Strategy Group
- ERA Steering Unit (and various working groups on interoperability and safety)
- Freight Focus Group
- HR Policies Working Group
- Infrastructure Interest Group
- Legal Working Group
- 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 all members' opinions 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



CER Team



Libor Lochman
Executive Director



Laura Henry
Communications Manager



Stefan Tobias
Senior Economist



Eva Böckle
Head of Communications



Yolande Martiniv
Secretary to the Executive Director



Isabelle Tshiams
Reception/Administration



Paule Bollen
Administration Manager



Emanuele Mastrodonato
ERA and Research-related Issues Adviser



Ilja Lorenzo Volpi
Head of Policy - EU and International Affairs



Ester Caldana
Policy Adviser - EU Institutions and Social Affairs



Matteo Mussini
Head of Public Affairs and Operations



Enno Wiebe
ERA and Research-related Issues Adviser



Miguel Ángel Caramello-Álvarez
Chief Legal Officer



Ethem Pekin
Senior Environmental Economist



Agnese Danelon
Senior EU Institutions Adviser



Britta Schreiner
Head of Infrastructure



Jacques Dirand
Head of Passenger and Freight Services



Jean-Baptiste Simonnet
ERA and Research-related Issues Adviser



Alena Havlová
Digital and Security Adviser



Jelena Soskic
Transport and Rail Policy Adviser



In memoriam
Aline Bastin † (1986-2016)

5.3 Member statistics

CER Member ^{a, b, c}	Country	Length of lines	Staff number		Passengers carried		Passenger-kilometres		Freight tonnes carried		Freight Tonne-km		Train-km (IM only) ^d		Turnover		EBITDA ^e
		in km	FTE ^d	Δ% 14/15	millions	Δ% 14/15	millions	Δ% 14/15	millions	Δ% 14/15	millions	Δ% 14/15	millions	Δ% 14/15	millions €	Δ% 14/15	millions €
ASTOC	SE	-	10 388	-2%	214.4	4%	12 741.0	5%	65.0	-4%	20 583.0	-3%	-	-	n/a	n/a	n/a
B Logistics	BE	-	n/a	n/a	-	-	-	-	n/a	n/a	5 000.0 ^p	n/a	-	-	15.0 ^p	n/a	n/a
BDŽ Holding	BG	4 019	10 016	-1%	22.5	-14%	1 552.0	-15%	8.3	-7%	1 783.0	-1%	-	-	199.8	n/a	27.3
BE	LV	-	182	3%	-	-	-	-	6.1	205%	2 403.8	200%	-	-	29.3	144%	3.4
BLS	CH	520	2 830	3%	55.6	3%	933.0	3%	-	-	2 626.0	-21%	13.6	1%	938.3	n/a	n/a
BRC	BG	-	321	7%	-	-	-	-	2.9	26%	850.0	7%	-	-	20.2	16%	1.3
BTS	LV	-	96	-39%	-	-	-	-	11.7	24%	3 480.0	3%	-	-	n/a	n/a	n/a
Bulmarket	BG	-	80 ^r	n/a	-	-	-	-	0.5 ^r	n/a	123.0 ^r	n/a	0.4 ^t	0%	n/a	n/a	n/a
ČD	CZ	-	22 432	-1%	169.7	0%	7 169.7	3%	66.4	-4%	11 096.0	-5%	-	-	1 212.8	1%	234.9
CFL	LU	275	3 062	n/a	421.4	n/a	418.0	12%	-	-	-	-	8.4	n/a	n/a	n/a	n/a
CFL cargo	LU	-	339	n/a	-	-	-	-	n/a	n/a	1 163.0	27%	-	-	n/a	n/a	n/a
CFR	RO	10 770	21 695	-3%	-	-	-	-	-	-	-	-	86.9	-1%	239.3	0%	88.7
CFR Călători	RO	-	12 514	-5%	55.0	-2%	4 619.0	2%	-	-	-	-	-	-	n/a	n/a	n/a
CFR Marfă	RO	-	6 324	-17%	-	-	-	-	27.8	0%	5 134.3	-4%	-	-	174.6	-16%	6.2
CP	PT	-	2 684	-1%	112.0	2%	3 625.0	3%	-	-	-	-	-	-	241.8	n/a	3.8
DB	DE	33 332	297 202	0%	2 251.0	0%	88 636.0	0%	300.2	-9%	98 445.0	-4%	1 054.0	1%	40 468.0	2%	4 778.0
DSB	DK	-	7 438	-2%	191.9	2%	5 980.0	0%	-	-	-	-	-	-	1 643.5	-4%	59.8
Eurostar ^q	GB (UK)	-	1 500 ^p	n/a	10.4	1%	4 768.0	n/a	-	-	-	-	-	-	n/a	n/a	n/a
EVR ^q	EE	794	821	n/a	-	-	-	-	-	-	-	-	6.5	n/a	n/a	n/a	n/a
FS Italiane	IT	16 724	69 276	0%	n/a	n/a	39 290.0	2%	n/a	n/a	11 957.4	4%	340.5	3%	8 585.0	2%	1 975.0
GFR	RO	61	2 446	19%	-	-	-	-	15.5	10%	3 831.0	8%	0.01	5%	164.4	5%	19.8
GySEV	HU/AT	509	2 271	0%	7.6	1%	298.6	0%	6.8	-6%	762.9	0%	7.2	0%	79.8	-7%	16.8
HSH	AL	424 ^s	1 334 ^s	n/a	0.4 ^s	n/a	15.9 ^s	n/a	0.1 ^s	n/a	15.3 ^s	n/a	0.8 ^s	n/a	6.3 ^s	0%	2.7 ^s
HUNGRAIL	HU	-	2 ^s	n/a	-	-	-	-	n/a	n/a	0.6 ^s	n/a	-	-	n/a	n/a	n/a
HŽ Cargo	HR	-	2 085	-23%	-	-	-	-	9.9	-5%	2 184.0	3%	-	-	113.0	1%	6.3
HŽ Infrastruktura	HR	2 604	5 029	-1%	-	-	-	-	-	-	-	-	20.4	0%	176.2	-9%	13.4
HŽ Putnički Prijevoz	HR	-	1 864	-2%	21.7	-1%	951.2	3%	-	-	-	-	-	-	121.5	-8%	19.3
IÉ	IE	2 400	3 793	-1%	39.7	5%	1 916.0	3%	0.5	-7%	96.4	-4%	17.0	1%	233.9	8%	29.5
LDZ	LV	1 860	11 542	-1%	17.1	-11%	591.4	-9%	55.6	-3%	13 023.0	-15%	18.6	-4%	420.0	-5%	102.2
LG ^u	LT	1 877	10 150	-3%	4.2	-8%	361.0	-3%	48.1	-2%	14 036.0	-2%	14.1	-1%	n/a	n/a	n/a
MÁV	HU	7 387	36 204	1%	109.0	-2%	5 356.0	-2%	-	-	-	-	101.0	0%	3.9	0%	0.5
Montecargo	ME	-	200 ^p	-2%	-	-	-	-	n/a	n/a	111.0	-26%	-	-	n/a	n/a	n/a
NRIC	BG	4 019	11 645	-1%	-	-	-	-	-	-	-	-	29.6	3%	174.6	5%	-13.8

CER Member ^{a, b, c}	Country	Length of lines in km	Staff number		Passengers carried		Passenger-kilometres		Freight tonnes carried		Freight Tonne-km		Train-km (IM only) ^d		Turnover		EBITDA ^e
			FTE ^d	Δ% 14/15	millions	Δ% 14/15	millions	Δ% 14/15	millions	Δ% 14/15	millions	Δ% 14/15	millions	Δ% 14/15	millions €	Δ% 14/15	millions €
NS ^u	NL	-	8 767	4%	319.8	2%	17 770.0	3%	-	-	-	-	-	-	n/a	n/a	n/a
NSB	NO	-	10 438	-5%	65.5	6%	2 965.0	-4%	-	-	-	-	-	-	1.7	0%	490.1
ÖBB	AT	4 846	39 561	1%	458.9	-2%	10 700.0	0%	109.2	-1%	29 000.0	0%	145.4	0%	4 843.3	-2%	1 690.7
OSE	EL	2 240	1 404	-9%	-	-	-	-	-	-	-	-	10.8	-6%	81.0	-35%	-65.0
RDG	GB (UK)	-	56 278	4%	1 722.1	3%	66 399.4	3%	-	-	-	-	-	-	n/a	n/a	n/a
PKP	PL	18 510	67 099 ⁱ	-25%	31.0 ⁱ	-78%	7 727.0 ⁱ	-35%	n/a	n/a	28 720.0	-10%	89.1 ⁱ	-35%	2 732.9	7%	190.1
Rail Polska	PL	28	329	-5%	-	-	-	-	3.1	7%	826.0	-5%	1.2	-9%	n/a	n/a	n/a
Regiotrans Brasov	RO	-	676	-30%	6.2	-28%	292.1	-35%	-	-	-	-	-	-	38.7	-38%	-0.2
RENFE Operadora	ES	-	14 229	-1%	465.2	0%	24 825.3	5%	20.8	-2%	7 080.1	-6%	-	-	2 240.3	2%	484.2
PE MZ Infrastructure	MK	699	1 235	-8%	-	-	-	-	-	-	-	-	2.3	0%	n/a	n/a	n/a
PE MZ Transport	MK	-	1 200 ^p	n/a	-	n/a	177.0 ^u	n/a	-	n/a	278.0 ^u	n/a	-	-	n/a	n/a	n/a
SBB CFF FFS	CH	3 172	33 000	1%	441.8	3%	18 559.9	2%	51.1	-4%	15 064.9	4%	180.1 ^h	1%	7 182.3	1%	2 104.0
SLB	AT	-	138 ^s	n/a	4.7 ^s	n/a	58.0 ^s	n/a	2.5 ^s	n/a	225.0 ^s	n/a	-	-	n/a	n/a	n/a
SNCB/NMBS	BE	-	19 361 ^g	-5%	231.6 ^g	-1%	10 333.0 ^g	-6%	-	-	-	-	-	-	2 283.6	-5%	20.4
SNCF	FR	28 808	153 000	n/a	1 201.7	n/a	84 681.8 ^u	-1%	50.3	1%	19 850.0 ^u	3%	505.0	3%	n/a	n/a	n/a
SŽ	SI	1 209	7 907	-2%	14.6	-1%	709.0	2%	16.5	-2%	3 854.0	0%	18.3	-9%	580.9	4%	86.7
SŽDC	CZ	9 467	17 311	1%	-	-	-	-	-	-	-	-	159.6	0%	158.4	1%	117.4
TCDD	TR	10 131	24 007	-1%	95.3	22%	4 828.0	10%	25.9	-10%	10 474.0	-13%	42.0	-2%	300.1	-4%	-693.4
TFG	RO	-	135 ^t	n/a	-	-	-	-	0.7 ^t	n/a	319.0 ^t	n/a	-	-	n/a	n/a	n/a
Thalys	BE	-	n/a	n/a	6.6 ^s	n/a	2 410.0 ^s	n/a	-	-	-	-	-	-	n/a	n/a	n/a
TRAI NOSE	EL	-	1 532 ^q	n/a	15.3 ^q	n/a	958 ^r	n/a	3.2 ^q	n/a	352 ^r	n/a	-	-	n/a	n/a	n/a
VDV ^q	DE	37 877	145 340	12%	2 320.0	1%	84 193.0	-1%	596.5	-2%	103 800.0	2%	-	-	-	-	-
VR Group	FI	-	8 615	13%	75.9	11%	4 114.0	6%	33.3	-10%	8 468.0	-12%	-	-	786.3	-9%	n/a
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
ŽFBiH	BA	601	3 546	-1%	0.3	-16%	21.0	-6%	8.8	2%	850.0	-6%	2.4	1%	57.9	-7%	3.0
ŽICG	ME	249 ^t	812 ^t	n/a	-	-	-	-	-	-	-	-	0.6 ^t	n/a	n/a	n/a	n/a
ŽRS	BA	426	3 172	-6%	0.2	0%	12.5	2%	4.9	0%	447.0	5%	1.6	7%	36.4	0%	-705.1
ŽS ⁱ	RS	3 739	16 896 ^u	-1%	5.0 ^u	-71%	307.0 ^u	-50%	5.8 ^u	-46%	1 666.0 ^u	-44%	13.0 ^u	-24%	n/a	n/a	n/a
ŽS Infrastructure ^k	RS	3 739	9 275	n/a	-	-	-	-	-	-	-	-	7.4	n/a	30.8	n/a	-0.8
ŽS Passenger	RS	-	n/a	n/a	n/a	n/a	201.7	n/a	-	-	-	-	-	-	n/a	n/a	n/a
ŽSR	SK	3 626	14 066	0%	-	-	-	-	-	-	-	-	49.3	6%	470.3	2%	99.4
ZSSK	SK	-	5 949	2%	55.6	18%	3 067.0	23%	-	-	-	-	-	-	279.8	-3%	-5.9
ZSSK Cargo	SK	-	6 028	-1%	-	-	-	-	34.7	-4%	6 838.8	-1%	-	-	284.3	-4%	47.7

CER Member ^{a, b, c}	Country	Length of lines	Staff number		Passengers carried		Passenger-kilometres		Freight tonnes carried		Freight Tonne-km		Train-km (IM only) ^d		Turnover		EBITDA ^e
		in km	FTE ^d	Δ% 14/15	millions	Δ% 14/15	millions	Δ% 14/15	millions	Δ% 14/15	millions	Δ% 14/15	millions	Δ% 14/15	millions €	Δ% 14/15	millions €
CFM	MD	1 151	9 230	-8%	3.3	-13%	181.0	-30%	4.2	-16%	959.0	-19%	2.7	-21%	n/a	n/a	n/a
GR	GE	1 566 ^t	n/a	n/a	3.1 ^t	0%	626 ^t	n/a	17.1 ^t	n/a	5 417 ^t	n/a	-	-	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
TS ^f	CH	-	10	0%	-	-	-	-	-	-	-	-	193.7	1%	2.0	-5%	0.0
UZ ^q	UA	21 625	293 685	n/a	398.6	n/a	37 065.0	n/a	389.7	n/a	211 233.0	n/a	n/a	n/a	n/a	n/a	n/a
VPE ^f	HU	-	34	0%	-	-	-	-	-	-	-	-	108.2	0%	2.1	0%	0.2

- Not applicable

n/a Not available

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

b Eurail (NL), a general sales organization 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) is a member of CER but is not listed in the table since operations have not yet begun.

d Train-path km from the point of view of the infrastructure manager

e Earnings Before Interest, Taxes, Depreciation and Amortisation

f TS and VPE are train path allocation bodies. As such, they allocate train paths and construct the timetable, but are not responsible for the operation and maintenance of the infrastructure.

g The drop in staff and passenger activities in 2015 is influenced by the fact that compared to the last reference year, Thalys activities are no longer included in the SNCB/NMBS data.

h Includes train paths used by the infrastructure manager.

i Differences compared to the previous reference year are the result of organisational changes within PKP Group.

j ŽS was restructured in 2015 into four entities. The data in this table only refers to the period 01.01.2015 to 09.08.2015.

k ŽS Infrastructure (Infrastructure of Serbian Railways JSC) operates as an independent joint stock company since 10 August 2015. Data for ŽS Infrastructure in this table therefore only covers the period 10.08.2015 to 31.12.2015.

p provisional

q 2014 data

r 2013 data

s 2012 data

t 2011 data

u UIC data

Annexes

- 6.1 Publications
- 6.2 Abbreviations
- 6.3 Glossary



6.1 Publications

Charters and agreements

- Sector Statement on Rail Freight Corridors (June 2016)
- A Roadmap for Digital Railways (April 2016)
- CER-ETF Rail Freight Declaration (December 2015)
- Joint letter from the Platform for Electromobility (November 2015)
- Freight Stakeholders call for open dialogue on wagonload services (October 2015)
- Transport White Paper: supporting rail means supporting our economy and citizens (September 2015)
- Road-rail combined transport: America shows the example (July 2015)
- Joint call for actions against metal theft at European level (May 2015)

Brochures

- Third Annual Report on the development of women's employment in the European railway sector (October 2016)
- Promoting employment and attractive working conditions in the European rail sector - Final report (April 2016)
- Rail freight corridors: creating harmonised approaches and unified services for the customer (December 2015)
- Rail transport and environment: facts & figures (September 2015)

Factsheets

- EU ETS reform (September 2016)
- Rail infrastructure quality and performance in 2013 (July 2016)
- Tackling rail freight noise (June 2016)
- CER - The Voice of European Railways (update - June 2015)
- Broad-gauge infrastructure in northern & eastern Europe (April 2015)
- The Transport White Paper targets: rail contribution (March 2015)

Position papers

- Implementation of the Recast - 'Conditions of access to services' (November 2016)
- CSM revision: how to deal with safety culture and human factors (November 2016)
- Safety alert IT tool (November 2016)
- Safe and precise localisation systems using satellite (SAT) (October 2016)
- ERTMS business case on the 9 core network corridors (October 2016)
- HS2 proposal on platform heights (October 2016)
- EU VAT Action Plan (August 2016)
- European Accessibility Act (July 2016)
- ERTMS business case for RALP and NSM corridors (June 2016)
- Rail as a key to decarbonising transport (June 2016)
- Building an ATO roadmap (May 2016)
- Road package: ensure fair competition between transport modes (February 2016)
- CER rail freight noise strategy (February 2016)

- Rail security (February 2016)
- Resolving the remaining DMI issues before the adoption of next ERTMS specification release (January 2016)
- Ballast pick-up due to aerodynamic effects (October 2015)
- Removing VAT-related distortions between transport modes (June 2015)
- Track maintenance for noise control by means of acoustic grinding (June 2015)
- Access to transportation data (May 2015)

Studies

- Longer trains: Facts & Experiences in Europe (May 2016)

6.2 Abbreviations

Agency	European Union Agency for Railways	EU	European Union
ASECAP	European Association with Toll Motorways, Bridges and Tunnels	FSM	Full Service Model
CEEP	European Centre of Employers and Enterprises providing Public Services	GHG	Greenhouse Gases
CEF	Connecting Europe Facility	GRB	Group of Representative Bodies
CEN	European Committee for Standardization	GSM-R	Global System for Mobile Communications – Railways
CENELEC	European Committee for Electrotechnical Standardization	HRD	Human Resources Directors
CIT	International Rail Transport Committee	IM	Infrastructure Manager
CLECAT	European Association for Forwarding, Transport, Logistics and Customs Services	IRU	International Road Transport Union
CO₂	Carbon Dioxide	MEP	Member of the European Parliament
DG GROW	European Commission Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs	MMF	Multiannual Financial Framework
DG HOME	European Commission Directorate-General for Migration and Home Affairs	NEBs	National Enforcement Bodies
DG MOVE	European Commission Directorate-General for Mobility and Transport	Noise TSI	Technical specification for interoperability relating to rail noise
DG TAXUD	European Commission Directorate-General for Taxation and Customs Union	NSA	National Safety Authority
EAA	European Accessibility Act	OSJD	Organisation for Co-operation between Railways
EBITDA	Earnings Before Interest, Taxes, Depreciation and Amortisation	OTIF	Intergovernmental Organisation for International Carriage by Rail
EBRD	European Bank for Reconstruction and Development	PRM TSI	Technical Specifications for Interoperability on accessibility of rail for persons with disabilities and Persons with Reduced Mobility
EC	European Commission	PRR	Passenger Rights Regulation
ECF	European Cyclists' Federation	RFCs	Rail Freight Corridors
ECTAA	European Travel Agents' and Tour Operators' Associations	RISC	Railway Interoperability and Safety Committee
EDF	European Disability Forum	RNE	RailNetEurope
EEA	European Environment Agency	RU	Railway Undertaking
EFRTC	European Federation of Railway Trackworks Contractors	SEETO	South East Europe Transport Observatory
EFSI	European Fund for Strategic Investments	TAF TSI	Technical Specification for Interoperability on Telematics Applications for rail Freight transport
EIB	European Investment Bank	TAP TSI	Technical Specification for Interoperability on Telematic Applications for rail Passenger transport
EIM	European Rail Infrastructure Managers	T&E	Transport and Environment
EPF	European Passenger Federation	TEN-T	Trans-European Transport Network
ERFA	European Rail Freight Association	TRAN	European Parliament's Committee on Transport and Tourism
ERRAC	European Rail Research Advisory Council	TSI	Technical Specifications for Interoperability
ERTMS	European Rail Traffic Management System	UIC	International Union of Railways
ESC	European Shippers' Council	UIP	International Union of Wagon Keepers
ETCS	European Train Control System	UIRR	International Union of combined Road-Rail transport companies
ETF	European Transport Workers' Federation	UITP	International Union of Public Transport
ETS	Emission Trading System	UNIFE	European Railway Industry Association
ETSI	European Telecommunications Standards Institute		
ETTSA	European Technology and Travel Services Association		

6.3 Glossary

Directive 91/440

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

First Railway Package

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

Second Railway Package

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

Third Railway Package

Third step towards rail market opening: passenger market. Regulation 1371/2007 on passenger rights, Directive 2007/58 on passenger liberalisation and Directive 2007/59 on train crew certification.

Recast of the First Railway Package

The Recast of the First Railway Package (now Directive 2012/34/EU) was approved by the Council of the EU on 21 November 2012, and published in the Official Journal of the EU on 14 December 2012. The new directive repeals Directives 91/440/EEC, 95/18/EC and 2001/14/EC.

Fourth Railway Package

The European Commission published the proposal of the Fourth Railway Package on 30 January 2013. The Package consists of three pillars: governance of the railway system, market opening, and a technical pillar. Approved in 2016 by both the Council and the European Parliament, it was published in the EU Official Journal in December 2016.

Regulation 1371/2007

Regulation 1371/2007 on Rail Passenger Rights established a minimum level of protection for rail passengers across the EU. The Regulation built on the well-established international CIV rules and complemented the existing voluntary sector initiatives and commitments.

Regulation 913/2010

The Regulation concerning a European Rail Network for Competitive Freight entered into force on 9 November 2010. The Regulation requests that Member States establish international market-oriented Rail Freight Corridors.

Transport White Paper

Commission Communication from 2011 setting out the EU transport policy for the next ten years, including perspectives up to 2050.

TEN-T Guidelines

European Commission proposal that sets the strategic framework for transport infrastructure investment until 2050.

Connecting Europe Facility

Related to TEN-T, this integrated financial instrument defines, as a common financial framework and part of the Multiannual Financial Framework (MFF) 2014-2020, the conditions, the methods and the procedures for providing European Union financial aid to support projects in the transport, energy and telecommunication infrastructures.





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