



# Annual Report

2018







The Community of European Railway and Infrastructure Companies (CER) brings together 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 71% of the rail network length, 76% of the rail freight business and about 92% of rail passenger operations in EU, EFTA and EU accession countries. CER represents the interests of its members towards EU policy makers and transport stakeholders, advocating rail as the backbone of a competitive and sustainable transport system in Europe.

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

**Published** in January 2019

For more information, see [www.cer.be](http://www.cer.be)

## Table of contents

Annual Report  
2018

### P4 Foreword



Crister Fritzson, CER Chair



Libor Lochman, CER Executive Director

## 1 P6

### CER at a glance

1.1 The Voice of European Railways	7
1.2 CER members	9
1.3 CER activities and political events	12
1.4 The European Railway Award	17
1.5 Communicating and collaborating in 2018	18



## 2 P20

### Economic development

2.1 A growing rail sector	21
---------------------------	----

## 3 P24

### In the spotlight

3.1 Shaping the discussion on mobility	25
3.2 A new EU budget focussing on greening and digitalising transport	27
3.3 Fourth Railway Package Technical Pillar – on the last mile	29
3.4 Promoting fair competition across transport modes	31
3.5 Digitalisation of European rail continues	33
3.6 An ever better rail system for an ever closer Union	35

## 4 P37

### CER governance

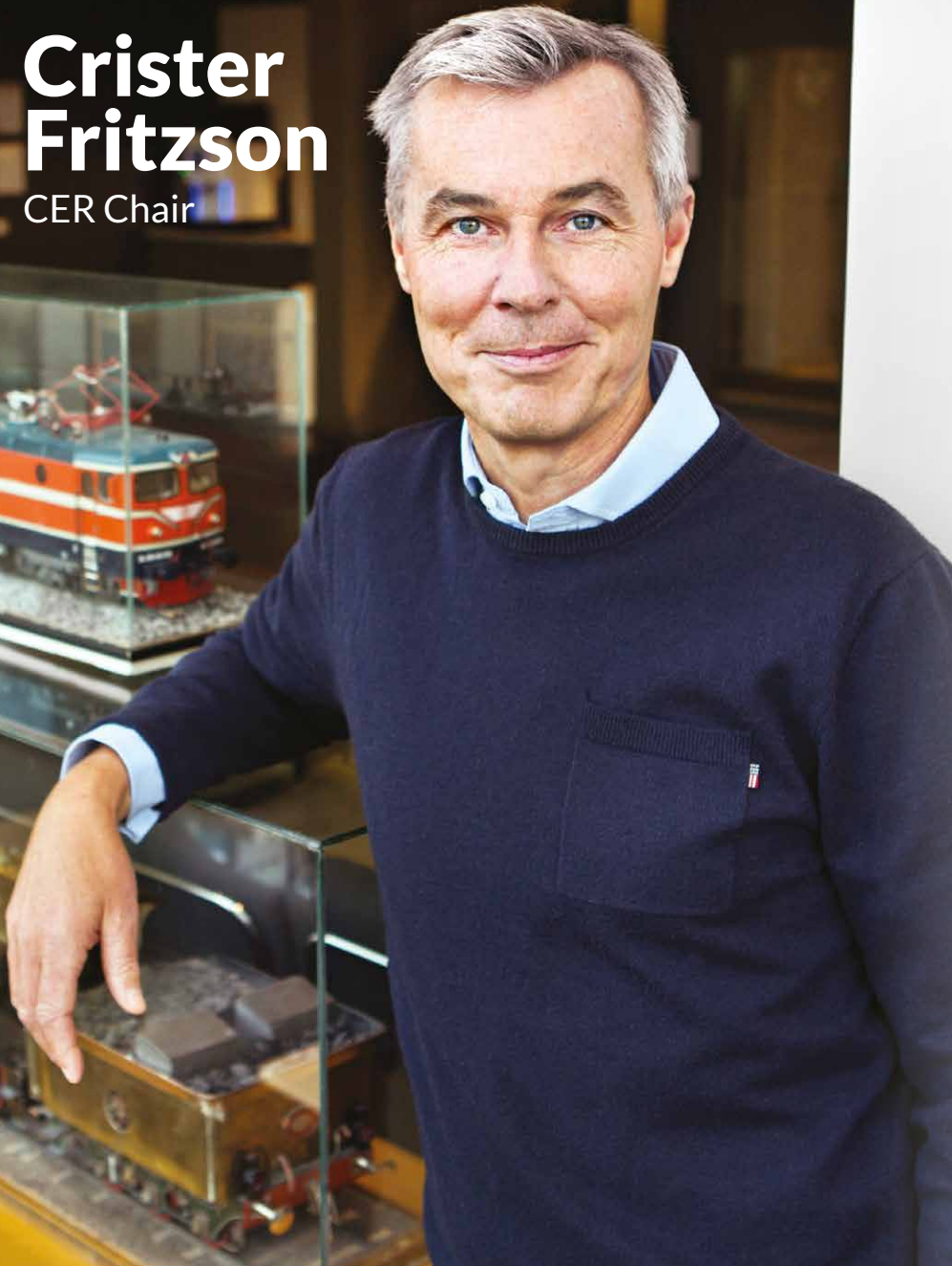
4.1 CER Management Committee	38
4.2 How does CER work?	39



## Foreword

# Crister Fritzson

CER Chair



2018 marked the 30th anniversary of CER. Since its foundation, the organisation has grown from 14 to more than 70 members and partners, comprising an overwhelming majority of the rail-related infrastructure and train operations in Europe. Cooperation for sure makes CER stronger than the sum of its parts, but a very important element is that each and every member, big or small, can also make its individual voice heard within CER.

The anniversary gave us a good opportunity to reflect on the progress and achievements made during all these years, but also on the challenges ahead and the necessary commitments. It is only natural that two of the most important examples show both what has been achieved and what the future can bring.

Firstly, CER has clearly helped the EU institutions in pushing for the climate agenda. In the transport sector, we have been among the readiest to support a cross-sectorial engagement on greener policy, to echo the Commission's 2011 White Paper on Transport, and to defend the commitments of the Paris agreement. However, as a whole, the transport sector is still lagging behind in terms of reducing its emissions. It is the only sector in Europe which failed to decrease its greenhouse gas emissions between 1990 and 2016. In fact, rail with its already miniscule footprint, is the only mode that succeeded in further reducing its CO<sub>2</sub> emissions during this period, despite a significant growth in traffic. And still, we remain focussed on implementing actions of decarbonisation that will improve this even more in the future. We can proudly say that rail has a very important role to play in the absolutely necessary shift to greener

modes of transport in Europe. And this has been acknowledged by decision makers. The targeted infrastructure investments of the Connecting Europe Facility in support of rail are proof.

Secondly, the sector has undergone a remarkable transformation in the course of the last decades: European railway undertakings have turned from national executive agencies into market-focused and business-oriented corporations able to make profit while providing quality services to customers, able to invest in R&D with generated earnings and profits, and able to succeed in a land transport market where the competitive conditions in many aspects still tend to favour other modes of transport. Today, railways are on the edge of a further transformation – this time due to developments in technology that will allow the digitalisation of current processes and services, but also open up new possibilities and opportunities. I am convinced that we have only just started to understand what can be done in this regard, and it is quite possible that the ideas leading to the most interesting outcomes have not even been conceived of yet.

Ideally, the commitment to work against climate change and the ongoing digital revolution can go hand in hand, transforming the transport sector and putting rail in the driver's seat. For this to happen, we still need smart policymaking to create the appropriate conditions and incentives, not only for the companies and organisations within the sector, but also for our present and future customers.

**Crister Fritzson**  
CER Chair



Over the last few years CER contributed heavily to the completion of the legal bases for the establishment of a Single European Railway Area. The rules to open the EU rail market and to overcome technical barriers between Member States are now in place. We used every opportunity to advocate a more sustainable EU economy via greener mobility where passengers and freight customers would increase their use of rail services. Not least we worked with the unions on the social agenda, to make railways attractive workplaces.

More recently CER and its members have been campaigning for an adequate level of budgetary support for the rail system in the upcoming Multiannual Financial Framework. We are counting on this to allow rail undertakings and their customers to make the most out of the latest available digital technologies.

But let's have a look at the future: 2019 will not be like any other year. A new legislature will kick off, with a new European Parliament and a new College of Commissioners. It will be a year of introductions and of getting to know each other, but also for starting some serious agenda-setting.

To learn more about all the changes needed to make rail the backbone of an ever more sustainable European mobility system, I invite you to go through the following pages. But let me use these lines to send three very basic messages – something to start the legislature off on the right foot.

**First – we are aware that our success depends on our ability to meet our customers' needs and to reward those who invest in our companies.** The last Eurobarometer report on

rail passengers' satisfaction confirms it, as well as the investments we are making in digitalising our processes and services. EU law should guide our companies and their interplay through free market forces. It should not replace business strategies. It should be an enabler, allowing players to do what they do best.

**Second – multimodal integration must be made a reality on the basis of fair intermodal competitive conditions.** In this way, rail will be able to cover its natural market segments of medium and long distances, while at the same time increasing the sustainability of logistics chains. Rail has the smallest carbon footprint of all motorised land transport operators, and the internalisation of external costs for all modes is fundamental to ensure an even playing field for European mobility.

**Third – let's work together. There are thousands of proposals to be made, lots of decisions to be taken, goals to be achieved.** Good business is destined to fail without political wisdom, and political wisdom is impossible without a good understanding of the business: this is why all policymakers – us, you, representatives of the institutions and all other stakeholders – must keep close contact, exchange ideas, hear out each other's arguments, take the best out of everybody's expertise. So let's talk. A lot. From the very beginning.

Let's not miss this opportunity.



**Libor Lochman**  
CER Executive Director

## Foreword



**Libor Lochman**  
CER Executive Director



1

## CER at a glance



## 1.1 The Voice of European Railways

Recognised as the voice of European railways for more than 30 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**
- ▶ Staffed by **20+** employees from across Europe

### 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.

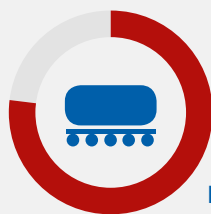


### CER membership

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



**71%**  
of the European rail  
network length



**76%**  
of the European  
rail freight business



**92%**  
of rail passenger  
operations in Europe

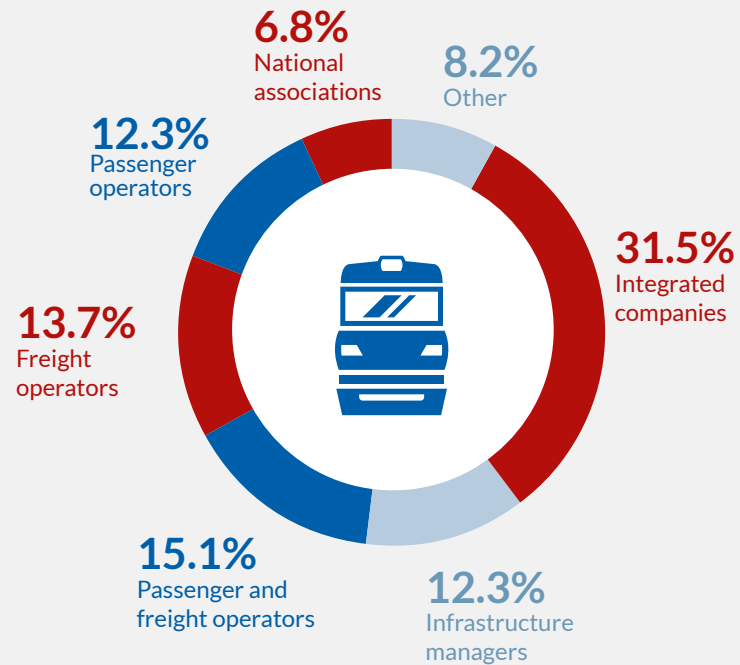
## CER membership

### CER members and partners come from:

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

### CER has a diversity of members

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



## Who we work with

### Other organisations



### European institutions





## 1.2 CER members (as of September 2018)

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

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

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

Country	Name	Logo
MONTENEGRO	Željeznička Infrastruktura Crne Gore (ŽICG) <i>Railway Infrastructure of Montenegro</i>	
NETHERLANDS	Nederlandse Spoorwegen (NS) <i>Dutch Railways</i>	
NORWAY	Norges Statsbaner (NSB) <i>Norwegian State Railways</i>	
POLAND	Polskie Koleje Państwowe (PKP) <i>Polish State Railways</i>	
POLAND	Rail Polska <i>Private freight railway undertaking</i>	
PORTUGAL	Comboios de Portugal (CP) <i>Portuguese Railways</i>	
ROMANIA	Compania Națională de Căi Ferate (CFR) <i>National Rail Infrastructure Company</i>	
ROMANIA	Societatea Națională de Transport Feroviar de Călători (CFR Călători) <i>National Rail Passenger Transport Company</i>	
ROMANIA	Societatea Națională de Transport Feroviar de Marfă (CFR Marfă) <i>National Rail Freight Transport Company</i>	
SERBIA	Železnice Srbije (ŽS) <i>Serbian Railways</i>	
SERBIA	Srbija Voz (ŽS Passenger) <i>National passenger railway undertaking</i>	
SERBIA	Infrastruktura Železnice Srbije (ŽS Infrastructure) <i>Infrastructure of Serbian Railways</i>	
SLOVAKIA	Železnice Slovenskej Republiky (ŽSR) <i>National railway infrastructure manager</i>	



Country	Name	Logo
SLOVAKIA	Železničná Spoločnosť Slovensko (ŽSSK) National passenger railway undertaking	
SLOVAKIA	Železničná Spoločnosť Cargo Slovakia (ŽSSK Cargo) National freight railway undertaking	
SLOVENIA	Slovenske Železnice (SŽ) Slovenian Railways	
SPAIN	Euskotren Basque passenger and freight operator	
SPAIN	Renfe Operadora (Renfe) National railway undertaking	
SWEDEN	Sveriges Branschföreningen Tågoperatörerna (ASTOC) Association of Swedish Train Operating Companies	
SWITZERLAND	BLS Regional railway undertaking	
SWITZERLAND	Schweizerische Bundesbahnen/Chemins de Fer Fédéraux Suisses/Ferrovie Federali Svizzere (SBB/CFF/FFS) Swiss Federal Railways	
UNITED KINGDOM	Eurostar International (Eurostar) International passenger railway undertaking	
UNITED KINGDOM	High Speed Two (HS2) Company developing the UK's new high-speed rail network	
UNITED KINGDOM	Rail Delivery Group (RDG) Association of passenger and freight operators in the UK (passenger section only)	

## Partners

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

## 1.3 CER activities and political events

### 1 January

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

### 16 January

The European Commission publishes the Report on the contribution of European standards to EU policies.

### 17 January

The European Parliament adopts its position on the 2030 targets for energy efficiency and renewable energy.

### 18 January

Rail Cargo Group hosts the CER Customs Group in Vienna.

### 22 January

CER Executive Director Libor Lochman meets with RALP Corridor Coordinator Paweł Wojciechowski in Warsaw.

### 23 January

First meeting of the Women in Transport EU Platform for Change, addressing the promotion of equal opportunities and employment of women in the transport sector. CER is a founding member of the Platform.

### 24 January

CER Executive Director Libor Lochman meets Polish Undersecretary of State Andrzej Bittel and PKP Group Management in Brussels.

### 31 January



**CER and the Bulgarian Presidency of the Council of the EU jointly host a roundtable on the future of transport financing in the context of the discussions on the next MFF in Brussels.**

### 31 January – 1 February

The fifth and final workshop of the CER-ETF Rail Mobile Workers project takes place in Copenhagen with a focus on the Scandinavian region.

### 31 January – 1 February

CER Executive Director Libor Lochman takes part in the Visegrad Group conference and Rail CEO Summit, organised by HUNGRAIL in Budapest.

### 6 February

MEPs pass a law to cut CO<sub>2</sub> emissions and to fund low-carbon innovation.

### 20 February

The 11<sup>th</sup> edition of the European Railway Award takes place in Brussels.

### 21 February

The CER Management Committee and the 61<sup>st</sup> CER General Assembly meet in Brussels.

### 27 February

The Council of the EU approves the reform of the EU Emissions Trading System (ETS) for the period 2021-2030.

### 8 March

The CER/UIC High-Level Passenger Meeting, kindly hosted by Renfe, takes place in Madrid.

### 14 March

The European Parliament votes on two resolutions on the next Multiannual Financial Framework (MFF), which represent the mandate for the Parliament to enter negotiations with the European Commission and the Council of the EU.

### 20 March



**The CER Digital Fair (#Rail4Digital) takes place in Brussels on the topic 'Digital railways: Present technologies, future trends'.**

### 21 March

The CER Assistants meet in Brussels.

### 28 March

The EU Commission releases its 'Action Plan on Military Mobility'.

JANUARY

FEBRUARY

MARCH



**10 April**

The working groups of the Sectoral Social Dialogue for Railways gather in Brussels.

**11 April**

The Customer Liaison Group (CLG) meets in Brussels.

**11-12 April**

CER Executive Director Libor Lochman takes part in the European Rail Safety Summit, organised by the EU Agency for Railways.

**13 April**

CER Executive Director Libor Lochman takes part in the high-level EU Presidency seminar *'EU Support for the development of rail transport in Bulgaria and in the Western Balkans'*.

**17 April**

The European Parliament adopts the Climate Action Regulation (CAR), also known as the Effort Sharing Regulation, Europe's tool to reduce the climate impact of sectors not covered by the EU Emissions Trading System.

**25-26 April**

CER Executive Director Libor Lochman takes part in the TEN-T Days in Ljubljana.

**26 April**

Over 40 stakeholders from the transport and related sectors, among which CER, jointly unveil the Ljubljana Declaration, asking for more investment in clean and modern transport under the post-2020 EU budget.

**2 May**

The European Commission publishes its legislative package comprising proposals for the 2021-2027 Multiannual Financial Framework (MFF): *'A Modern Budget for a Union that protects, empowers and defends'*.

**15 May**

The Council of the EU formally adopts binding annual greenhouse gas emission reduction targets for EU Member States from 2021 to 2030.

**16 May**

CER participates at a meeting of the Network of Executive Boards of the Rail Freight Corridors in Brussels.

**16 May**

CER takes part in the ERRAC Plenary meeting.

**16-17 May**

The CER/UIC High-Level Freight Meeting takes place in Vienna, hosted by Austrian Federal Railways ÖBB.

**17 May**

The European Commission comes forward with the 'Third Mobility Package'.

**22-23 May**

CER Chair Crister Fritzson speaks on the future of rail at the International Rail Development Conference in Brussels.

**23-24 May**

CER welcomes its members, the European Commission, and national customs authorities for the annual joint Customs-Railway meeting in Brussels.

**24 May**

CER Executive Director Libor Lochman speaks at the Ministers' Roundtable on *'Strategic transport infrastructure funding: Ensuring long-term resilience'* during the International Transport Forum Summit in Leipzig.

**24 May**

The European Parliament Committee on Transport and Tourism (TRAN) votes on the revision of Directive 1999/62/EC on the charging of road vehicles.

**29 May**

Kindly hosted by CER Chair Crister Fritzson, the CER Management Committee meets in Stockholm.

**30 May**

The CER Group of Human Resource Directors gathers in Stockholm.

**6 June**

The Group of Representative Bodies (GRB) discusses the major progress in the 4<sup>th</sup> Railway Package with EU Agency for Railways Executive Director Josef Doppelbauer.

**8 June**

The Steering Committee of the Sectoral Social Dialogue for Railways gathers in Brussels.

**12 June**

The European Parliament votes in favour of an initiative to give young people free Interrail tickets to discover the EU.

**14 June**

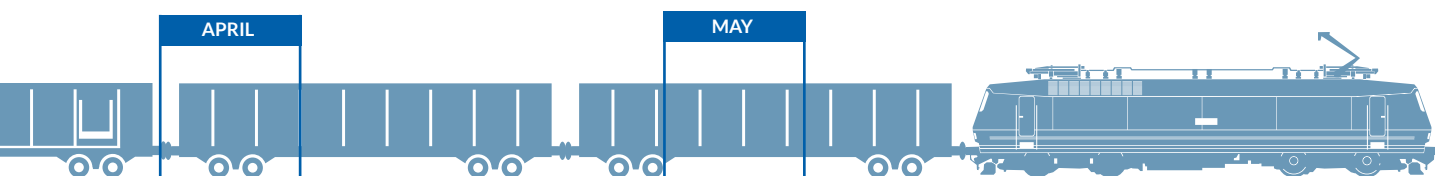
The European Commission presents the long-expected initiative on rail passenger security, in the form of an EU action plan to improve the security of rail passengers and staff.

**14-15 June**

CER takes part in the 68<sup>th</sup> General Assembly of COLPOFER in Naples.

**14 June**

The CER/UIC High-Level Infrastructure Meeting takes place in Amersfoort.



**15 June**

The 12<sup>th</sup> PRIME plenary meeting takes place in Amersfoort.



**CER celebrates its 30<sup>th</sup> Anniversary with a panel debate entitled '30 years of CER and EU transport policy: ready for the future?' and a summer cocktail.**

**19 June**

CER hosts a meeting with the European Commission's DG MOVE Units responsible for rail transport, in the presence of RNE and FTE.



**CER organises a Strategy Workshop moderated by CER Chair Crister Fritzson, followed by the CER Assistants Meeting.**

**1 July**

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

**6 July**

CER takes part in the CEO Summit 2018 in Vienna, hosted by ÖBB.

**10 July**

The European Parliament TRAN Committee adopts its report on the Commission proposal amending the Combined Transport Directive 92/106/EEC.

**28 August**

CER Executive Director Libor Lochman meets Mattias Landgren, State Secretary to the Swedish Minister for Infrastructure, in Stockholm.

**12 September**

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

**16-22 September**

The European Commission's European Mobility Week takes place from 16 to 22 September, the theme is 'Multimodality'.



**The CER Management Committee takes place in Berlin, kindly hosted by Deutsche Bahn, and is followed by the General Assembly at the German Federal Ministry of Transport and Digital Infrastructure.**

**18 September**

A Eurobarometer survey confirms that Europeans are increasingly satisfied with passenger rail services.

**18 September**

CER organises a breakfast with EU Transport Commissioner Violeta Bulc for the members of the CER Management Committee in Berlin.

**18-21 September**

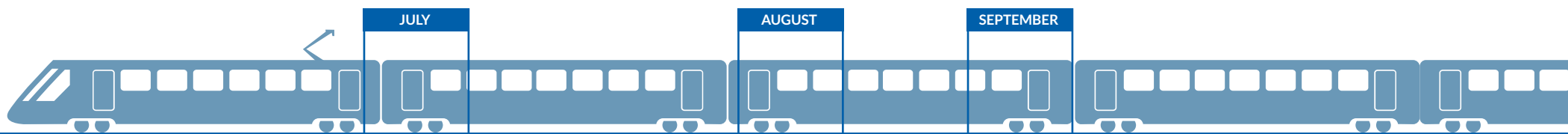
The 12<sup>th</sup> InnoTrans Fair takes place in Berlin, giving an in-depth view into the latest developments in railway technology and infrastructure, public transport, interiors and tunnel construction.

**19 September**

In the context of Innotrans, CER joins the Women in Mobility Luncheon and ERA stand, to raise awareness about activities to increase women's presence and participation in the railways.

**24 September**

CER takes part in the 7<sup>th</sup> EU-Japan Industrial Dialogue on Railways in Brussels.





**26 September**

CER Executive Director Libor Lochman meets Henrik Hololei, EU Commission Director-General for Mobility and Transport

**27 September**

The Customer Liaison Group (CLG) meets in Brussels.

**4 October**

At the meeting of the Women in Transport EU Platform for Change, CER and ETF present their 'Women in Rail' survey to collect data and monitor progress in women's presence in the sector.

**10 October**

CER Executive Director Libor Lochman gives a keynote speech at the EUMedRail annual Conference, organised by the EU Agency for Railways in Brussels.

**10 October**

CER organises a workshop on service facilities and rail-related services in Brussels.

**10 October**

**CER and the Austrian Federal Railways ÖBB jointly organise a roundtable entitled 'Rail - Europe's climate solution?' in Brussels. The event is supported by the Austrian Presidency of the Council of the EU.**

**24 October**

The autumn Customs Working Group meeting takes place in Utrecht, kindly hosted by DB Cargo Nederland.

**25 October**

The European Parliament votes on the revision of Directive 1999/62/EC on the charging of road vehicles, a good development of the Commission proposal towards wider application of the user- and polluter-pays principles.

**29-30 October**

The EU's transport and environment ministers meet in Graz (Austria) for an informal joint Council meeting.

**7 November**

CER sponsors a Rail Forum Europe breakfast debate on the next MFF 2021-2027.

**8 November**

The CER Assistants meet in Paris.

**14 November**

The CER Human Resource Directors Group meets in Brussels.

**15 November**

The Sectoral Social Dialogue plenary meeting takes place in Brussels in the presence of EU Commission Deputy Director-General for Mobility and Transport Maja Bakran.

**15 November**

The 13<sup>th</sup> PRIME plenary meeting takes place in Brussels.

**15 November**

The European Parliament votes on the revision of Regulation 1371/2007 on rail passengers' rights.

**20 November**

CER and the other rail social partners take part in a training session for the European Works Council of Getlink SE, to speak about the European rail social dialogue.

**20 November**

CER attends the DG MOVE conference 'Automation in transport: how does it affect the labour force?'

**21 November**

CER Executive Director Libor Lochman takes part in the G4 CEOs meeting in Bratislava.

**22-23 November**

CER takes part in the 69<sup>th</sup> General Assembly of COLPOFER in Paris.

OCTOBER

NOVEMBER

**27 November**

CER takes part in the Anniversary event of the Women in transport EU Platform for Change.

**28 November**

The European Commission publishes its Communication 'A clean planet for all – A European strategic long-term vision for a prosperous, modern, competitive and climate neutral economy' setting the long-term strategy for greenhouse gas emission reductions.

**30 November**

CER takes part in the ERRAC Plenary meeting.

**3 December**

EU transport ministers gather in Brussels.

**4 December**

CER Executive Director Libor Lochman takes part in the Danube Region transport Days 2018 in Ljubljana.

**6 December**

Kick-off meeting of RAILSEC, the new EU Rail Passenger Security Platform.

**6 December**

The EU Rail Freight Day takes place in Vienna.

**6 December**

The Rail Freight Forward coalition presents the vision '30 by 2030 - Rail Freight strategy to boost modal shift'. More info at [www.railfreightforward.eu](http://www.railfreightforward.eu).

**12 December**

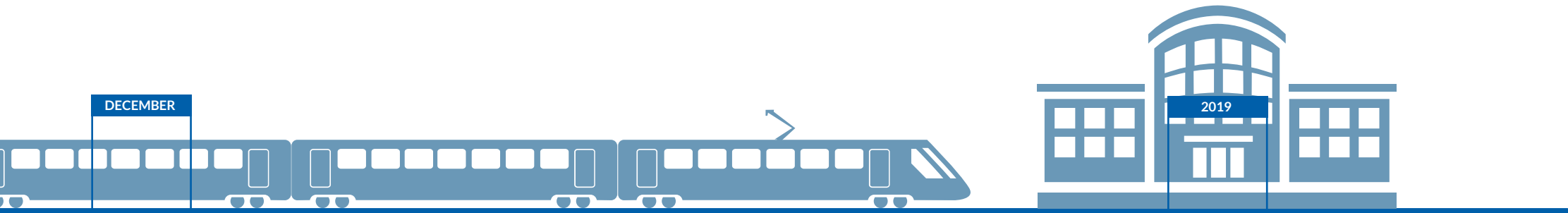
The European Parliament votes in favour of the Connecting Europe Facility and the commitment to invest in greening and modernising transport.



**17 December**

CER takes part in the DG MOVE conference 'Multimodal sustainable transport - which role for the internalisation of external costs?'

To mark their climate commitment and win hearts and minds in support of a modal shift, the members of the Rail Freight Forward coalition officially launch Noah's Train. The train travels from the COP24 Climate Summit in Katowice through Vienna (14/1), Berlin (24/1), Paris (5/2) and Brussels (20/2).



## 1.4 The European Railway Award

2018 marked the beginning of a new era for the European Railway Award. After celebrating its 10<sup>th</sup> Anniversary the year before, the gala evening returned with a few new twists. The political and technical award categories were rolled into one and the Gotthard Base Tunnel became the first ever project to receive the award.



Renzo Simoni (centre left) and Peter Jedelhauser (centre right) accepting the award on behalf of the European workforce who brought the project to life



A snapshot of the panel debate moderated by Karin Helmstaedt (left)

The European Railway Award has become an established event in the European rail calendar. Initiated by CER in 2007 and now co-organised with UNIFE (the Association of the European Rail Supply Industry), it honours outstanding achievements in the development of rail as an economically as well as environmentally sustainable transport mode. In 2018 this distinction went to the **Gotthard Base Tunnel Project**, for delivering the world's longest railway tunnel, shifting freight to rail.

As the first ever project to receive the European Railway Award, the Gotthard Base Tunnel is an outstanding example of shifting freight to more environmentally friendly modes of transport, by relying on public support and a fair financing system. The tunnel is at the heart of Europe's most important rail freight axis – the Rhine-Alpine corridor boosting rail freight traffic from Rotterdam to Genoa. Rail passengers are also benefitting by enjoying reduced travel times and more seats, and traffic is expected to nearly double between 2015 and 2021.

Over 500 guests from all over Europe, including high-level politicians and transport stakeholders, attended the ceremony in



Left to right: UNIFE Director General Philippe Citroën, European Coordinator for the Rhine-Alpine core network corridor Pawel Wojciechowski, CER Chair Crister Fritzon, UNIFE Chair Sabrina Soussan, European Transport Commissioner Violeta Bulc, Chair of the EP Transport and Tourism Committee Karima Delli, former Head of the Gotthard North South Corridor Project at SBB Peter Jedelhauser, former CEO of AlpTransit Gotthard Ltd Renzo Simoni, CER Executive Director Libor Lochman

Brussels where **Peter Jedelhauser, former Head of the Gotthard North South Corridor Project at SBB**, and **Renzo Simoni, former CEO of AlpTransit Gotthard Ltd** accepted the award on behalf of the European workforce who brought the project to life.

The event is traditionally also an occasion to hear from key EU policymakers on their outlook for rail in the year ahead. **European Commissioner for Transport, Violeta Bulc**, highlighted how “*the rail sector has a central role to play in the transition to integrated, smart and low-emission mobility*”, while **MEP Karima Delli (Greens/EFA, FR), Chair of the Committee on Transport and Tourism**, underlined “*2018 is going to be a very challenging year for the rail sector at EU level. There is a common will between the European*

*Commission and the European Parliament to promote passengers' traffic and freight, in order to decarbonise transports and to better connect European citizens.*”

As part of the ceremony's new format, the Commissioner and TRAN Chair were speaking in an introductory panel debate where they were joined by the respective Chairs of CER and UNIFE as well as **Pawel Wojciechowski, European Coordinator for the Rhine-Alpine core network corridor**.

The event took place on 20 February 2018 and concluded with the CER-UNIFE Annual Reception.

**For more information visit**  
[www.europeanrailwayaward.eu](http://www.europeanrailwayaward.eu)



## 1.5 Communicating and collaborating in 2018

### 28 publications across 6 key areas

#### 1. Climate policy



- Put Europe “on track” to achieve climate-neutral transport (fact sheet, October 2018)
- The Strategy for long-term EU greenhouse gas emissions reductions (position paper, September 2018)
- Call for a realistic timetable for transitioning to new lighting technologies (joint statement, March 2018)
- Review of ecodesign and energy labelling requirements for lighting products (joint position paper, January 2018)

#### 2. Future EU budget



- Joint letter on accessibility in CEF (September 2018)
- Commission Proposal on Connecting Europe Facility (position paper, September 2018)
- The Connecting Europe Facility (CEF) and its wider benefits (fact sheet, August 2018)
- Ljubljana Declaration by the stakeholders of the CEF Transport Campaign (joint statement, April 2018)
- A sufficient EU budget for the best rail system in Europe (joint position paper, February 2018)
- The future of transport investments - What MFF do we need? (fact sheet, January 2018)

#### 3. Intermodal affairs



- Mobility Package – Ensure fair intermodal competition (joint statement, July 2018)
- Review of Regulation 1073/2009 (coaches), with Regulation 1071/2009 (market access) (position paper, May 2018)
- Commission proposal COM(2017)648 amending Directive 92/106/EEC on combined transport (position paper, March 2018)

#### 4. Regulation



- Joint statement on the EC proposal for a Directive on representative actions (October 2018)
- “New Deal for Consumers” Package (position paper, October 2018)
- Public consultation on the draft Implementing Regulation on the Economic Equilibrium Test for national rail regulatory bodies (position paper, May 2018)

## 5. Technical affairs & digitalisation



- Commission proposal COM(2018)279 on electronic freight transport information (position paper, October 2018)
- Exchange of domestic tariff data - NeTEx standard (joint position paper, October 2018)
- CER position on the Directive on re-use of public sector information (recast) (position paper, September 2018)
- Route Compatibility Check (joint position paper, July 2018)
- COR SMD - A European safety Database (joint position paper, July 2018)
- Sector Vision for the Future of Reference Standards (joint position paper, July 2018)
- Minimum Connections Times (MCTs) (position paper, July 2018)
- Longer trains - Facts & experiences in Europe (report, June 2018)
- Rail Vehicle Applications - FAQ (joint brochure, March 2018)
- Revision of 445/2011 Regulation (position paper, February 2018)

## 6. Who we are



- CER Annual Report (report, February 2018)
- CER - The Voice of European Railways 2018 (brochure, February 2018)

Website - [www.cer.be](http://www.cer.be)

**28 137** users -5%

**140 006** page views +16%


**11 319** downloads +40%

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

**2 415** followers +20%

LinkedIn - CER 

**2 590** followers +29%

Tweet of the year 





2

## Economic development



## 2.1 A growing rail sector



The European rail sector achieved growth of almost 4% in both passenger and freight operations in 2017<sup>1</sup>. This growth was strongest in the EU-13, especially for rail freight.



In the first quarter of 2018, the rail passenger and freight sectors continued to grow, but at a slower pace.

### Increase in European rail freight market

Unlike the previous two years, the rail freight sector was able to **achieve positive growth in 2017**. The results show that rail tonne-kilometres in Europe increased by 3.6% in 2017. As can be seen in Figure 1, the European rail freight sector performed better than the rate of growth of industrial production<sup>2</sup>, which grew by 3.3% over the same period. Nonetheless, the European rail freight market in 2017 still remains 5.3% below the pre-crisis level of 2007.

As reflected in Figure 2, rail tonne-kilometres grew particularly strongly in the EU-13, where **European freight operators achieved a growth of 8.1% in 2017**. This positive trend is underlined by a sharp increase of 10.8% in the first half of 2017 followed by a growth of 5.6% in the second half, as can be seen in Figure 3. By contrast,

rail freight operators in the EU-15 were able to achieve a moderate growth of 1.3% in 2017, which was more pronounced in the first half of the year (+2.1%) compared to the second half (+0.5%).

### A thriving European rail passenger market

**The rail passenger sector in Europe grew substantially in 2017** compared to previous years. Rail passenger services in Europe grew by 3.8% in 2017, the highest rate of growth since 2008. During the same period, the unemployment rate<sup>3</sup> for the EU-28 fell by 11.6%, from 8.6% in 2016 to 7.6% in 2017.

Figure 4 shows the annual rail passenger development in Europe. The growth was most pronounced in the EU-13, where rail passenger-kilometres grew by 7.4% in 2017. Figure 5 shows that this trend was slightly

stronger in the first half of the year (+8.8%) compared to the second half (+6.1%). With an increase in passenger-kilometres of 3.4% in 2017, the EU-15 rail passenger market improved on its moderate growth during the previous years. This growth was spread almost evenly between the first half (+3.6%) and second half (+3.3%) of 2017.

### European rail market growing in the first quarter of 2018

While rail transport continued to develop positively in the first quarter of 2018, the strong growth of 2017 could not be maintained. European rail passenger operators increased passenger-kilometres by 1.7% in the first quarter of 2018. This growth was more pronounced in the EU-13, where the rail passenger market grew by 2.0%, compared to the EU-15, where it grew by 1.7%. During the same period, the European rail freight market grew by 2.4%.

Most of this growth, however, stems from the EU-13, where the rail freight market grew by 4.9% compared to a moderate growth of 0.2% in the EU-15<sup>4</sup>.

1 Data based on Eurostat quarterly statistics for EU-28

2 Industry Production Index (which includes mining and quarrying, manufacturing, electricity, gas, steam and air conditioning supply), Eurostat, December 2018

3 Unemployment rate, Eurostat, December 2018

4 Excluding rail freight data for Germany. At the time of writing, rail freight data for the first quarter of 2018 was not yet available for Germany.

## Rail freight development in Europe

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

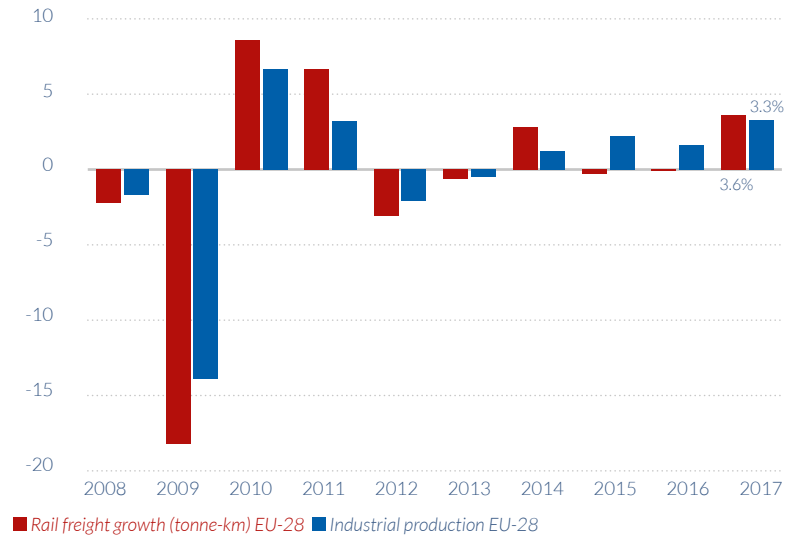


Figure 2: Annual rail freight development in Europe (million tonne-km)

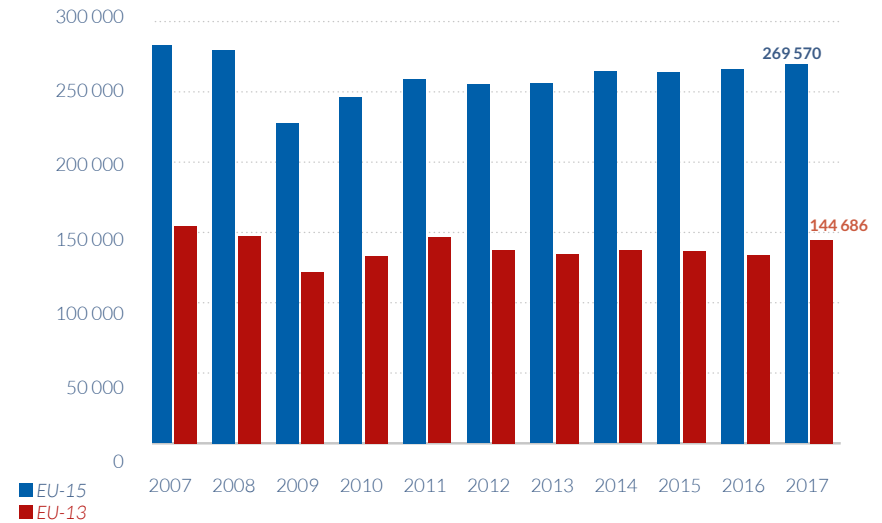
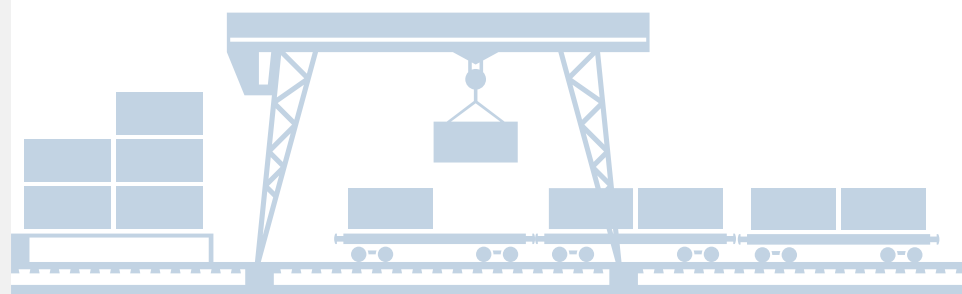
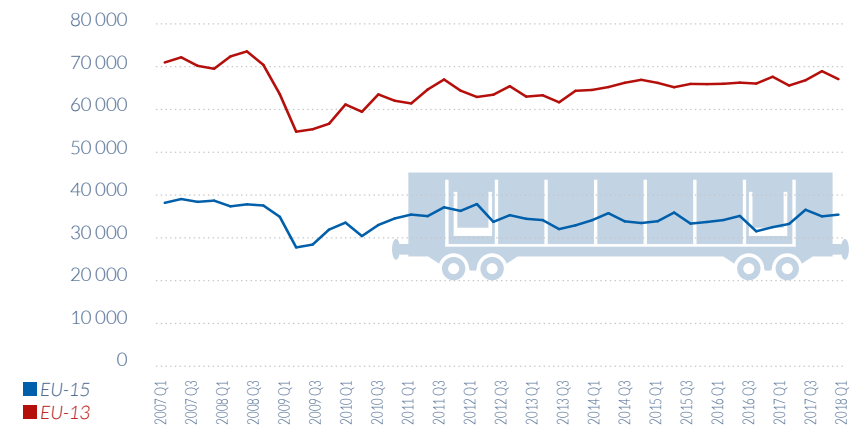


Figure 3: Quarterly rail freight development in Europe (million tonne-km)



## Rail passenger development in Europe

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

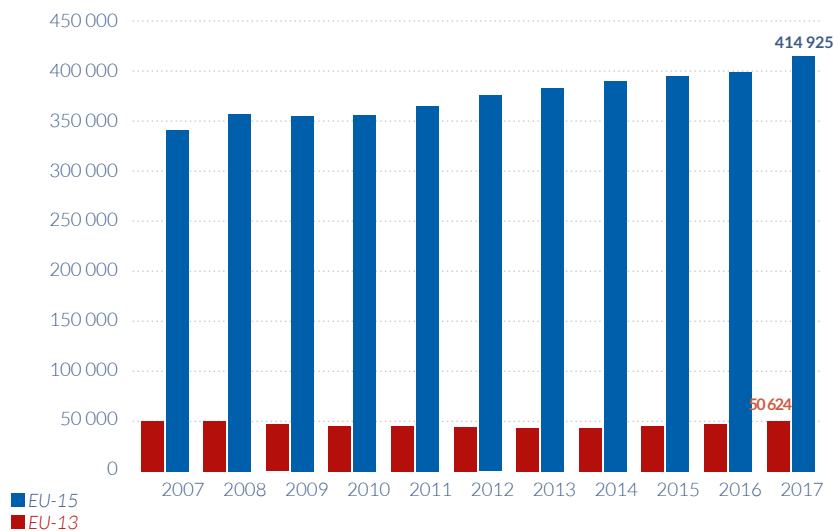
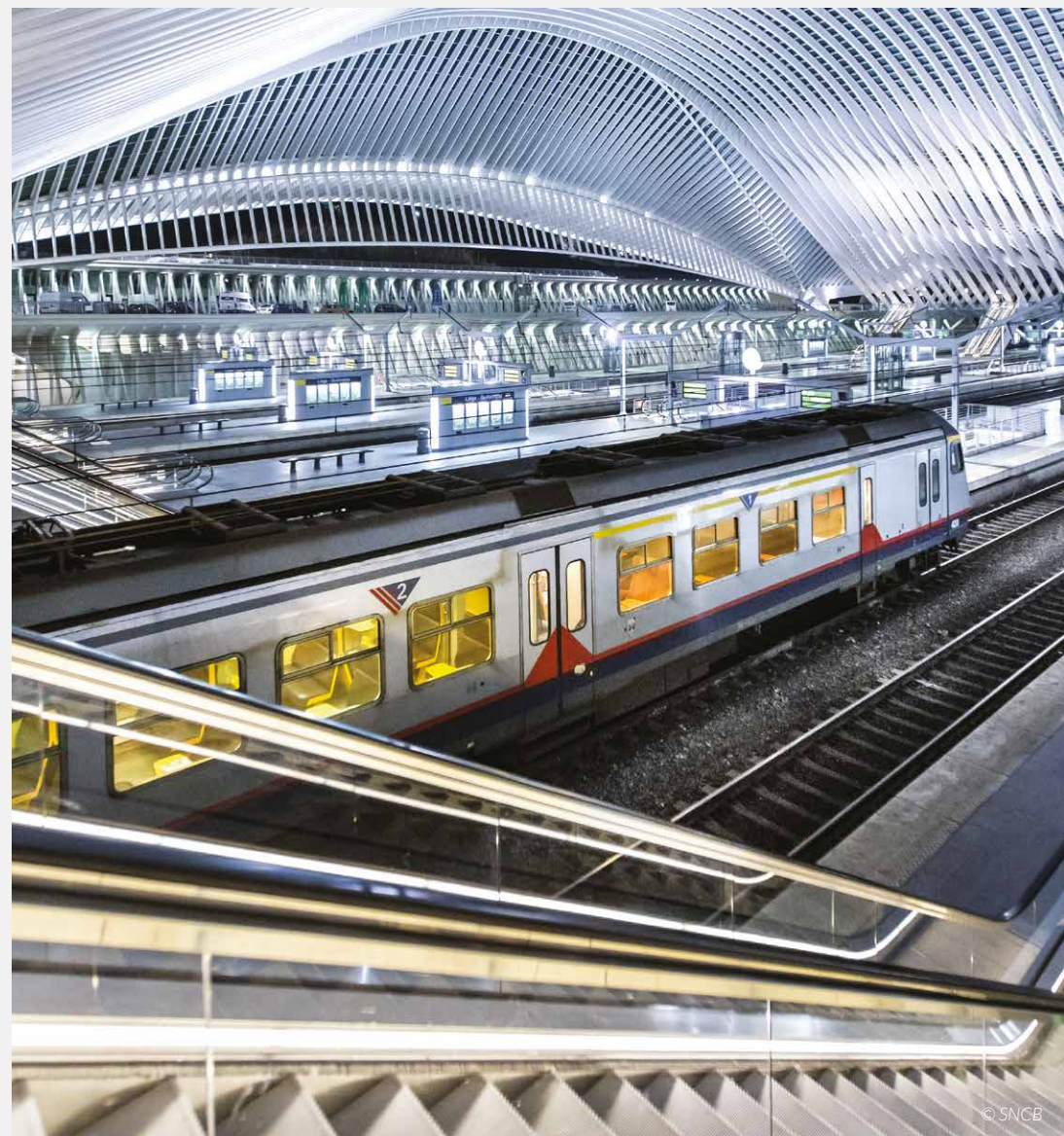
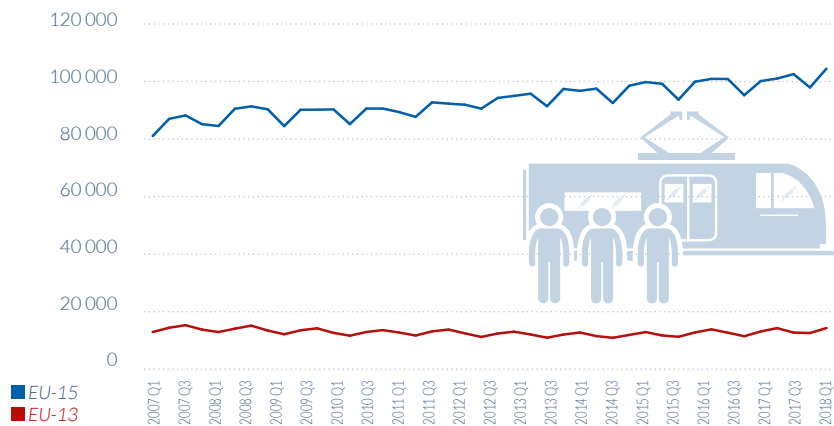


Figure 5: Quarterly rail passenger development in Europe (million passenger-km)



© SNCB



3

In the spotlight



## 3.1 Shaping the discussion on mobility



CER is a key player in the EU transport regulatory landscape



Technical, technological, financial and policy-related factors have an impact on the overall performance of the rail sector: CER is the 'voice of railways' on all these fronts

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

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

In the framework of the **EU decision-making process**, the main interfaces for CER are the European Commission, the EU Agency for Railways, the European Parliament, and the Permanent Representations of the Member States to the EU.

In this section, we present the main axes of CER's actions.

Over the past year, CER has focused its activities on:

- shaping the new generation of EU financing instruments that can support railway developments by acknowledging the sector's contribution to the EU's connectivity, citizens' mobility, and the achievement of climate targets and decarbonisation goals (see section 3.2)
- the technical and operational realisation of a safe, efficient and interoperable EU-wide railway network (see section 3.3),
- creating the all-important conditions needed for fair competition among transport modes (see section 3.4);
- the promotion and integration of market and digital solutions to improve the performance of the rail system and customers' experience (see section 3.5);

### Further priority actions in 2018:

#### Protecting our passengers' rights

The growing passenger satisfaction reflected in the recent Eurobarometer report (Flash Eurobarometer 463) shows that railways are constantly striving to meet the highest standards with their trains and services so as to further improve their competitiveness and attract customers. As the EU institutions discuss the recast of Regulation 1371/2007 on rail passenger rights, CER has been working closely with decision makers to reiterate the need to put the attractiveness and affordability of passenger services at the heart of the discussion. Railways are well aware that the passenger experience and the cost of tickets are decisive factors when customers pick their transport mode. This is why rail passenger rights not only have to be customer-friendly, but they must also enable rail to be affordable and remain competitive and attractive for customers.

#### Striking the right 'New Deal for Consumers'

The 'New Deal for Consumers' package includes among others a proposal for a Directive on collective redress. CER shares the objective of the EU to guarantee to all citizens the highest degree of protection against corporate misbehaviour and believes that the right regulatory environment, coupled with joint industry-consumer initiatives, are fundamental to allow markets to grow hand in hand with customer protection. For this reason, the regulatory environment must be clear and consistent; the new proposal on collective redress regrettably does not meet those criteria. CER has genuine concerns which it has been raising with EU decision makers, in particular regarding the risk of undermining national justice systems to the detriment of consumers and the risk of creating a parallel system to the Rail Passenger Rights Regulation.

### Keeping on top of passenger security

The European Commission's initiative on rail passenger security was published in June 2018 in the form of an 'EU action plan to improve the security of rail passengers and staff'. A key element of the action plan was the establishment of an EU Rail Passenger Security Platform (RAILSEC) bringing together the national authorities for both law enforcement (Home Affairs Ministries) and transport (Transport Ministries). The main objective of the platform is to formulate guidelines or information notes that may help to deliver a common approach on different issues related to rail security. The first topics identified for the platform were a common methodology for the assessment of rail security risks or guidelines in the areas of information to passengers, security technology and research, and insider threat. CER has closely worked with decision makers in the run-up to the publication of the action plan and is now an official observer of the platform, providing input to the ongoing discussions between the Commission and Member States.

### Achieving accessibility for all

Ensuring and enhancing the accessibility of the railway system for all passengers is one of the core tasks of each railway company. In the sector, the Technical Specifications for Interoperability on Passengers with Reduced Mobility (PRM TSI) are setting EU-

wide requirements for an accessible railway environment, both in trains and at stations. Together with other sector associations and representatives of disability groups, CER has been working closely with the EU Agency for Railways on the revision of the TSI. Beyond the railway sector, more general and cross-sectoral requirements on accessibility are expected to enter into force with the European Accessibility Act (EAA), which also covers transport. It is important that the effective framework set by the PRM TSI is not jeopardised, but consistently recognised in the EAA.

### Driving the discussions on train drivers

The general revision of the Train Drivers Directive is in the pipeline and expected to be presented under the next European Commission. The revision should pave the way for further harmonisation of the EU-wide licensing scheme for train drivers. In the meantime the Commission and the EU Agency for Railways are tackling the aspect of train drivers' language competence in the Directive. Namely, a limited revision of Annex VI of the Directive is under way in order to make it possible for railway undertakings and infrastructure managers to test alternative tools and devices versus advanced foreign language skills of train drivers. In an input paper published in July, CER welcomed this approach and restated that the experience gathered via pilot projects should allow to reassess the

definition of language competence in the Directive during the upcoming revision.

### Committing to reduce railway noise

Reduction of rail freight noise remained a top priority for CER in 2018. CER was successful in having a seat in the Commission's Noise Expert Group, which started to discuss the future Environmental Noise Directive. CER also submitted a position paper to the EU Agency for Railways in March regarding the revision of the Technical Specifications for freight wagons (TSI Noise). The availability of public funding should be consistent with the policy goals set by TSI Noise. The sector therefore looks forward to the dedicated CEF budget and future funding within the next EU budget.

### Taking a role in the zero-emission strategy

In November 2018, the Commission published its strategy for long-term EU greenhouse gas emissions reduction in advance of the COP 24 Climate Change Conference, which was held in Katowice, Poland. Acknowledging that transport emissions are the main obstacle in realising the EU's climate commitments, CER is keen to underline that rail offers a widely available solution to decarbonise transport today. Thus, in October together with the Austrian Federal Railways ÖBB, CER hosted a high-level roundtable discussing rail as Europe's climate solution. CER also joined

forces with two other rail associations, EIM and UNIFE, to develop a position paper on the EU strategy. CER urges EU policymakers to come up with an effective action plan that can deliver the emission reductions needed in the transport sector, starting with a binding greenhouse gas emission target as well as realising modal share goals.

### Ensuring rail funding with the next Multiannual Financial Framework

In May 2018, the Commission put forward its proposal for the next Multiannual Financial Framework (MFF) which defines all EU budget envelopes for the seven years after 2020. The budget line dedicated to the Connecting Europe Facility (CEF transport) is of particular interest to CER (see section 3.2 'A new EU budget for greening and digitalising transport' on page 27). Other budgetary lines that depend on the MFF negotiations are regional funds, Horizon Europe, the amount dedicated to the guarantee fund called InvestEU as well as the size of the DiscoverEU project. In the Parliament's position, there is also an interesting call on the Commission to provide a dedicated budgetary line on sustainable tourism – a policy field where railways should be able to play a very strong role. It is not sure whether MFF negotiations will end before the next European elections (end of May 2019), or after that important date.



## 3.2 A new EU budget focussing on greening and digitalising transport



The CEF programme for rail provides crucial funding for rail projects of EU added value and with a social dimension (border crossing projects, interoperability, connectivity of all regions – i.e. projects that might otherwise not be funded)



CER's main objective: increase the proposed CEF budget for transport and earmark a budget for digitalisation / telematics applications including ERTMS

### Budgeting for the future

On 6 June 2018, the European Commission released its proposal for the new **Connecting Europe Facility (CEF)** Regulation as part of the **Multannual Financial Framework (MFF)**, for the period 2021-2027. The proposal makes available EUR 42.3 billion to be managed under the CEF programme, of which EUR 30.6 billion to be allocated to the transport envelope, EUR 8.7 billion to the energy envelope, and EUR 3.0 billion to the digital envelope (or 'telecom' under the current CEF).

This followed the publication of the proposal on the Multiannual Financial Framework (MFF) 2021-2027 on 2 May 2018 for which the European Commission proposed an EU budget of EUR 1,279.4 billion. Almost 25% of this is to be spent on actions contributing to climate objectives, an increase from the

current 20%. For the CEF programme, a 60% target is foreseen.

### Funding a better connected Europe

The new CEF programme proposes to allocate EUR 14.5 billion, or 60% of the general transport and cohesion envelope, to **support the creation of efficient and interconnected networks** by continuing to implement actions on the core network (85%) and, to a lesser extent on the comprehensive network (15%). The remaining 40%, that is EUR 9.6 billion, is to be allocated to smart, sustainable, inclusive, safe and secure mobility, including investing in digitalisation and European traffic management systems, as well as actions supporting rail freight services.

The Commission further proposed, for the first time, a special allocation of EUR 6.5 billion from the security and defence



© DB

budget for actions supporting transport infrastructure on the TEN-T network with the purpose of enabling a civilian-military dual use of the infrastructure.

Grants for studies and works remain the standard means of EU financial support to transport projects. In addition, the new CEF programme proposes the possibility to blend EU grants with financial instruments, such as the InvestEU Fund, enabling additional sources of financing for transport projects.

### Voicing the priorities for railways

CER welcomes the Commission proposal on CEF. As the implementing tool of the TEN-T network, **the programme plays a vital role in mobilising the necessary resources needed to complete the core network by 2030 and the comprehensive network by 2050.** CEF is also an important tool for the European Commission to push its policy objectives, such as **greening transport and achieving efficiency gains through enhanced interoperability,** and to correct certain market failures, for example when projects with significant societal benefits do not receive adequate financing from the market.

However, in spite of the reinforced budget for smart technologies, the proposal does not provide enough robust EU funding for the deployment of ERTMS for the period 2021-2027. **The digital transformation of operations, and in particular ERTMS on board and on track, is one of the main priorities for the rail sector** for the upcoming financial period. The rail sector estimates that at least EUR 15 billion of EU

funding is needed just for the deployment of ERTMS for the period 2021-2027. An acceleration of investments in interoperable technology enabling the Single European Railway Area is therefore needed in order to remain competitive on the mobility market.

CER believes that **investment in rail infrastructure creates EU added-value** by directly contributing to the common European objectives of decarbonisation, digitalisation, and increased competitiveness. Such investment supports the creation of the single market with increased mobility of citizens and goods, as well as seamless mobility and accessibility for all users, in particular elderly people, persons with reduced mobility and passengers with a disability. Furthermore, it directly contributes to economic growth, jobs and cohesion.



Connecting Europe Facility (CEF)	CEF 2014-2020	CEF 2014-2020 (readjusted)*	CEF 2021-2027 (proposed)
<i>EUR Billion</i>	<i>Current prices</i>	<i>Current prices</i>	<i>Current prices</i>
<b>CEF Transport</b>	26.2	24.1	30.6
(i) General transport envelope	14.9	12.8	12.8
(ii) Contribution from Cohesion Fund	11.3	11.3	11.3
(iii) Support for Military Mobility	0.0	0.0	6.5
<b>CEF Energy</b>	5.9	5.4	8.7
<b>CEF Digital (previously "Telecom")</b>	1.1	1.0	3.0
<b>Total Envelope CEF Programme</b>	<b>33.2</b>	<b>30.5</b>	<b>42.3</b>

\*Reallocation of funds from the CEF financial envelope to the European Fund for Strategic Investment (EFSI) in 2015

### 3.3 Fourth Railway Package Technical Pillar – on the last mile



The implementation of the 4<sup>th</sup> Railway Package's Technical Pillar is now on its last mile.

The 4<sup>th</sup> Railway Package is a set of six legislative texts created to complete the single market for rail services (Single European Rail Area). Its overarching **goal is to revitalise the railway sector and make it more competitive**. It comprises the so-called “Market Pillar” and the “Technical Pillar”.

Based on the principles laid down in the recast Interoperability Directive, the Safety Directive and the ERA Regulation, the final implementation of the 4<sup>th</sup> Railway Package's Technical Pillar on 16 June 2019 has been enabled by a number of implementing and delegated acts – defining the precise conditions for a harmonised framework for the Member States when transposing European directives into national law.

#### ERA becomes *the* railway authority in Europe

A central pillar of the 4<sup>th</sup> Railway Package is establishing the European Union Agency for railways as the railway authority in Europe. De jure the Agency becomes an **authority responsible for issuing authorisations for the placing on the market of railway vehicles** and vehicle types, for **issuing single safety certificates** for railway undertakings

in the European Union and for **granting ERTMS trackside approval**.

In the last year, there was a strong focus on the **practical arrangements** for vehicle authorisation and safety certification as well as the process for ERTMS trackside approval. The European railway sector – organised in the **Group of Representative Bodies (GRB)** – significantly contributed to and helped shape these arrangements in the above-mentioned implementing and delegated acts. The sector managed to define adequate and lean processes, which will **ensure a short time to market** for vehicles, and avoid unnecessary burden for railway undertakings in particular when upgrading or renewing vehicles. A revised set of common safety methods paves the way for the new single safety certification at European level. For the use of vehicles the sector achieved a common set of general principles for route compatibility checks.

#### Exchanging safety-related data at EU level is beneficial

Although huge efforts have been made, some open points remain in the field of safety. Common occurrence reporting including the **Safety Alert and Information Tool (SAIT)** has not been finalised. A

sound solution is necessary as **common occurrence reporting is a core element of drafting safety management systems** as well as granting safety certificates and managing supervision.

For safety authorisation the **national safety authority** shall continue to be responsible for the planning, implementation and monitoring of the assessment work. The final provisions to be laid down in a Commission Regulation on practical arrangements for issuing safety authorisations to infrastructure managers are still pending.

#### Avoiding unnecessary financial burden

The **fees and charges payable to the Agency** were set in a transparent, fair and uniform manner, with the objective of simplification. They should not result in the imposition of unnecessary financial burden on enterprises and **should not jeopardise the competitiveness** of the European railway sector. The Agency shall therefore, at the request of the applicant, issue a non-binding estimate of the amount of fees and charges related to the application or request for services and provide information on when the invoices will be issued.

#### Vehicle registration goes digital

Registers are a keystone of the 4<sup>th</sup> Railway Package's Technical Pillar. **Providing all information in a digital format ensures quicker data processing** achieving quicker results. In future the European Vehicle Register, with a link to the national vehicles registers, will provide a comprehensive overview of vehicles being put on the market. The Register of Infrastructure (RINF) provides the main features of the European railway infrastructure. The values of the parameters recorded in the Register of Infrastructure will be used in combination with the values of the parameters recorded in the vehicle authorisation for placing on the market to check the technical compatibility between vehicle and route.

#### Revising the Technical Specifications for Interoperability

The 4<sup>th</sup> Railway Package defines a new legal framework for the European railway sector. In this light, it's been necessary to **revise the Technical Specifications for Interoperability (TSIs)** – in particular when defining the new requirements for vehicle authorisation and ERTMS trackside approval. The Technical Specifications for Interoperability define the technical and



operational standards which must be met by each subsystem (e.g. rolling stock or infrastructure) or part of a subsystem in order to meet the essential requirements and ensure the interoperability of the EU's railway system as a whole. Furthermore the harmonisation of operational rules was driven by the revision of the OPE TSI. This TSI applies to the operation and traffic management subsystem of infrastructure managers and railway undertakings.

The implementation of the Fourth Railway Package's Technical Pillar **is now on its last mile**. Nine Member States notified the European Commission in December 2018 that they will transpose the 4<sup>th</sup> Railway Package's Technical Pillar into national law by the deadline of 16 June 2019. However, the remaining 17 eligible countries have decided to defer transposition until June 2020. **As a consequence, there will be a patchwork of regulatory frameworks during the deferral period**, presenting a challenge in particular for safety certification, vehicle authorisation and ERTMS trackside authorisation.



## 3.4 Promoting fair competition across transport modes



Road transport proposals matter to rail's competitiveness and its ability to help make Europe's transport greener via a modal shift



CER calls for fair competition between transport modes, in terms of infrastructure and external-cost charging, but also working conditions

Transport in Europe is a vibrant and fiercely competitive sector, changing fast due to digitalisation and liberalisation. In the EU, **rail transport markets have been fully liberalised for freight since 2007, for cross-border passengers since 2010, and for domestic passengers they will be open from late 2020.** Railways are competing for customers both among themselves and with other modes: road and aviation for passengers, road and inland water navigation for freight. Rail's success therefore depends **on framework rules that guarantee fair competition between transport modes.** This is why CER has been following the EU's Mobility Package and getting involved in the debate surrounding it since early 2016.

The Mobility Package – aka Road Package, due to its focus on road transport – is a series of proposals published by the European Commission in three waves:

### 1<sup>st</sup> wave, 31 May 2017

Proposals of major interest to CER are those on road charging, market access and on working conditions in road transport. Other proposals concern electronic road tolling, hired goods vehicles, transport research and innovation, certification of truck CO<sub>2</sub> emissions and new test procedures and labelling for car emissions.

### 2<sup>nd</sup> wave, 8 November 2017

Proposals actively followed by CER are those on liberalising domestic coach and bus markets and on combined transport. Other proposals concern CO<sub>2</sub> standards for cars, public procurement of clean vehicles (road vehicles only) and alternative fuel infrastructure (e.g. charging stations for electronic road vehicles).

### 3<sup>rd</sup> wave, 17 May 2018

CER's major focus here is E-documentation for freight transport (see section 3.5 on

digital topics). Besides the EU's first-ever standards for truck CO<sub>2</sub> emissions, other proposals concern road safety, tyre labelling, fuel price comparisons, TEN-T implementation and maritime transport. They also include an action plan for batteries and a strategy for connected and automated mobility.

### Road charging: the Eurovignette Directive

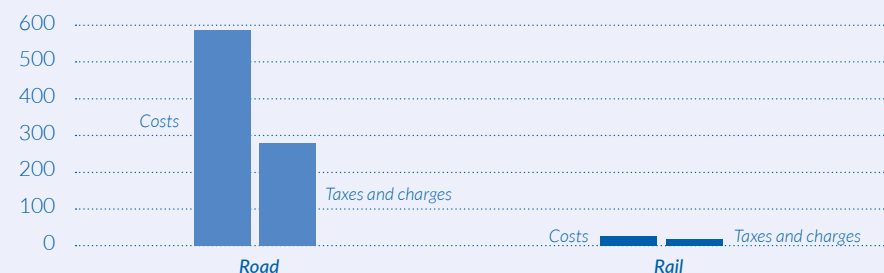
Road charging and the revision of the so-called Eurovignette Directive (1999/62/EC, amended as 2011/76/EU) has been a focus of CER's for many years. By EU law, **railways pay distance-based charges for infrastructure use everywhere in the EU.** For roads however, such charging is applied only on around 25% of major roads in the case of trucks, even less for cars and buses. This violates the user-pays principle, and it means rail faces unfair competition.

Similar imbalances exist with regard to the polluter-pays principle: clean transport like rail can thrive on its merits only if transport externalities (e.g. air pollution, CO<sub>2</sub> and noise) are internalised for all modes – an objective that remains to be achieved.

**In addressing both the user-pays and polluter-pays principles, an ambitious Eurovignette revision matters much to rail.**

CER therefore welcomed the Commission's 2017 Eurovignette proposal and further substantial improvements agreed in 2018 in the European Parliament. These include earlier phase-out of time-based infrastructure charging and mandatory external-cost charging for trucks and buses – improvements that CER and others had called for. But legislative progress is hampered by Member States' reluctance to consider the file, leading to a standstill in the Council of ministers despite calls from CER and others to speed things up.

### Through taxes and charges, rail internalises almost all its variable infrastructure and external costs, unlike road (preliminary figures by European Commission consultants, Dec 2018)



## Road working conditions

Road working conditions matter just as much to rail and the intermodal playing field. **Rail offers good working conditions**, e.g. in cross-border transport, where a maximum of two daily rests may be spent away from home and due attention is given to the work-life balance needs of concerned staff. Conditions for truck drivers are often less favourable, rendering road freight artificially cheap and making it difficult for rail to compete. The proposed overhaul of road social legislation is proving highly controversial both in Parliament and Council.

CER has not only followed but also spoken up in the Brussels debate about revising the rules on driving and rest times, cabotage and posting abroad. CER produced a joint statement with the European Transport Workers' Federation (ETF) calling for rules to ensure fair intermodal competition in the context of the Mobility Package.

## Coach and bus market liberalisation

Railways compete with coaches and buses for passengers. The impact of new coach and bus services on the viability of rail public service contracts is of specific concern. This is why CER has involved itself in the debate around the Commission's proposal to liberalise domestic coach and bus markets (revision of Regulation 1073/2009, which only opened cross-border traffic to competition). Discussions in the Parliament's TRAN Committee have reflected concerns voiced by CER and others over public services. Member States

and the Council have so far been passive on the file.

## Combined transport

In combined transport (CT), rail is often the long-distance transport mode combined with road transport for the first or last mile. Some outdated framework rules in

the CT Directive of 1992 (92/106/EEC) needed revision, a process that CER has accompanied. Parliament adopted its position in July 2018 while Council adopted its general approach in December 2018, paving the way for trilogue negotiations that could be completed during the current Parliament's mandate.



© VR



## 3.5 Digitalisation of European rail continues



CER and its members are pushing forward with the sector's digitalisation developments to offer highly efficient transport options to its customers.



The shift towards electronic and virtual ticketing systems continues with increasingly personalised offers to passengers.

Over the last year, CER and its members have continued their work on digitalisation. The 'full service model' which should help create more multi-carrier and cross-border journeys for passengers has reached its implementation stage. Ongoing work on ERTMS deployment is progressing and CER has been active within the DTLF, while also showcasing new technologies and ideas at CER's Digital Fair event in March 2018. In addition, CER responded to new legislative proposals on the sharing of public sector information (PSI) and electronic freight transport information (eFTI).

### Increased offers for multi-carrier journeys

Railway undertakings are putting time and resources into developing the operational, legal and commercial frameworks **to offer more multi-carrier and cross-border journeys to passengers.**

This market-driven approach is leading to concrete results: the **Full Service Model** (FSM) specifications are offering a single uniform interface to connect all interested railways and ticket vendors. Passengers

will benefit from a wider range of origin-destinations and through-journeys. 2018 saw an increased uptake and interest, with more railway undertakings adopting the FSM. The FSM specifications are available to download free of charge. CER encourages all railways and ticket vendors to download and apply them, especially when contracting with new commercial partners.

The **Agreement for Journey Continuation** is another innovative commercial solution to support stranded international passengers and already counts 15 participating railway operators. It gives customers the possibility to get on board the next trains of the same carriers at no extra cost.

The shift towards electronic and virtual ticketing systems also continues with increasingly personalised offers to passengers.

### Re-use of public sector information

In April 2018, the European Commission released its proposal on the re-use of public sector information (PSI). CER has a positive view on re-using data and supports

the distribution of public data, especially in the form of open service, when based on voluntary contracts with terms and conditions. Open service ensures that partners, external developers and service providers can enrich customer-oriented offers.

CER worked with members on the potential effects this proposal would have on some companies in the railway sector. CER believes the proposal could allow competing transport and other sector companies to utilise data at no cost, preventing rail companies from benefitting from their own data, and closing potential avenues of new revenue.

CER recognises that public and private transport companies compete for the same service contracts, and an unbalanced handling of their data can distort competition. CER is therefore working with the Parliament and Council to improve the proposal.

### E-freight and eFTI

The **Digital Transport and Logistics Forum (DTLF)** was established by the Commission to support the improvement of interoperability in logistics and freight transport across Europe. CER has contributed considerably to this Forum, in cooperation with CIT and UIC-Raildata. The Forum is divided into two subgroups:

- **Subgroup 1:** to give an overview of documents currently being used in freight transport, a state of play of digitalisation of transport documents, and a blueprint for a transport document data sharing infrastructure
- **Subgroup 2:** to develop a concept for freight corridor information systems based on a federative platform approach

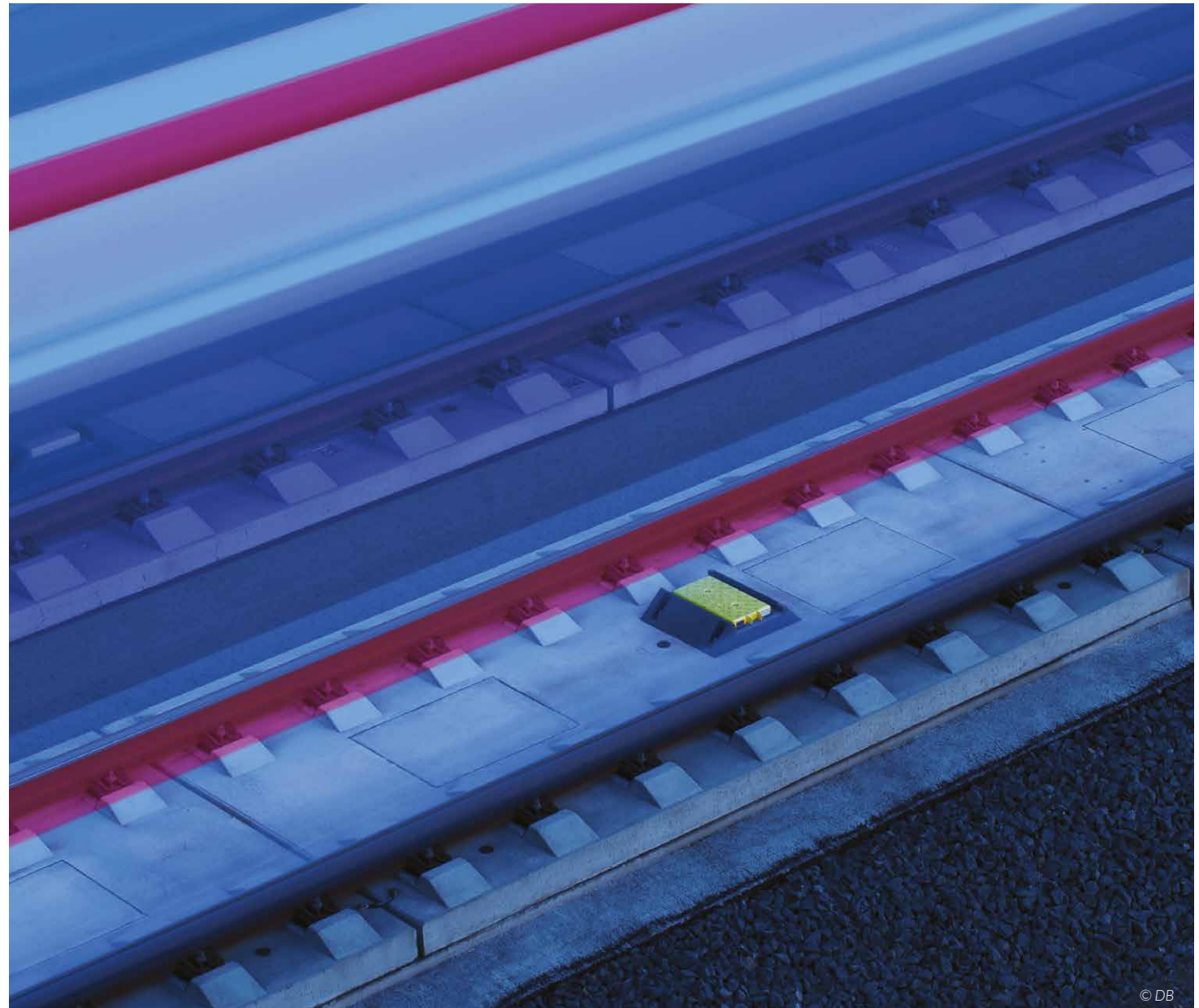
An important deliverable of the DTLF is the **Proposal on Electronic Freight Transport Information (eFTI)**, aimed at encouraging public authorities to accept transport information submitted in electronic format. The obligation to submit transport information to public authorities on paper is indeed the main obstacle for digitalisation of

documents. The proposal was published on 17 May as part of the 3<sup>rd</sup> Mobility Package. It is currently being discussed in the European Parliament and Council.

## ERTMS

**ERTMS deployment is progressing** on corridors and national implementation plans reveal ambitious long-term objectives **but financing is still a big issue**, especially for railway undertakings. In 2018, CER, as sector rapporteur for ERTMS, identified the progress made in deployment plans and provided figures and proposals for future-proof financing mechanisms.

Supporting processes are being refined in the Control Command and Signalling Technical Specification for Interoperability (CCS TSI). While infrastructure managers are now taking the lead on a reference CCS architecture for infrastructure, it is essential to find a sector agreement on the wider system architecture and a realistic migration path facilitating innovation and capacitive networks. Through its coordination with other sector organisations and stakeholders (e.g. EC institutions, Shift2Rail, UNISIG, EUG, EULYNX, IRSE...), CER is facilitating sector consensus and advising how to achieve quicker value with new-generation CCS solutions.



© DB

### 3.6 An ever better rail system for an ever closer Union



An efficient European rail sector makes EU mobility as a whole economically stronger, more sustainable and safer.



This requires a combination of continuous self-improvement within the sector and competitive EU legislation.

At the beginning of the new legislature, CER will present its Policy Agenda for the years 2019-2024 to the new College of Commissioners, to the new European Parliament and to the whole policymaking community.

Such an agenda aims to take stock of the existing regulatory environment in which European rail operators provide their services, but more importantly to suggest **a way forward, that can enable the EU society at large to rely on better, more sustainable and more efficient mobility**, drawing the greatest benefit from a strong and reliable railway system.

**This way forward rests on two fundamental pillars.**

The **first pillar** is the **commitment of the railways themselves to continuously self-improve**, in particular by **embracing digitalisation**, in a way that enables them

to match the evolving demand of their customers.

Demographic, economic and political trends will shape new ways of moving in urban and non-urban areas. In order to adapt, rail recognises that it will be imperative to integrate into a multimodal, ever more digitalised transport chain.

If railways demonstrate the ability to take care of new needs in terms of comfort and accessibility, an increasing number of elderly people will be led to use trains more frequently both in urban areas and for long-distance journeys. This is why substantial investments are being made to deliver barrier-free travel, in particular for passengers with reduced mobility.

At the same time a tech-savvy generation of customers will rely much less on private transport, preferring shared mobility and public transport solutions. Levels of comfort



© AdobeStock

and on-board connectivity will have to follow this trend, offering the possibility of an enhanced travel experience.

On the freight side, ports and terminal operators as well as container shippers will have to find in rail a logistics partner able to forward semi-finished and higher-added-value products in a seamless logistics chain.

The changes in global distribution of different portions of the industrial production chain are pushing rail to serve

markets where it has traditionally been less present than other modes: rail freight operators will continue to work on reliable transit times, trackable freight and door-to-door transport solutions in order to meet customers' needs and benefit from the increasing global freight flows.

**The second pillar is of course EU legislation.**

Rail-specific legislation has come to impact each and every single aspect of the rail



business. The Fourth Railway Package has put in place the legal bases for full market opening by designing a set of regulatory provisions that grant equal access for all passenger operators to all domestic markets, both on commercial routes and non-commercial routes covered by public service contracts.

Considerable progress has been made in fostering technical integration and harmonisation of rail systems of all Member States. The EU Agency for Railways now has a more active role and there is a higher degree of technical standardisation and lighter administrative burdens for multi-country interoperability authorisations and safety certifications. This has been a fundamental achievement on the path towards a Single European Rail Area.

Furthermore, the sector has been making its case as the backbone of sustainable transportation: as a consequence, rail is drawing much attention among the investment priorities of the Union through the Connecting Europe Facility, the Cohesion Fund, and the European Structural and Investment funds. Judging by the work so far of the Commission, the Council and the European Parliament on the next Multiannual Financial Framework, there is reason to hope that this attention will be kept in the future.

What is left to do is to redress a number of policies that today do not guarantee an intermodal level playing field. This is why our Policy Agenda includes a section dedicated to a number of policy targets that must be

jointly tackled by the EU institutions and the rail sector.

Amongst other regulatory instruments we expect the Mobility Package to go towards the widest possible application of the user- and polluter-pays principle, and adopt direct-cost charging as a minimum condition for the calculation of infrastructure user charges.

An 8<sup>th</sup> General Union Environment Action Programme should be promoted, with a time-span of at least five years and including a further revision of the ETS Directive (2003/87/EC), that should phase out free ETS allowances for aviation and propose a way to make carbon pricing applicable to all transport modes. In the meantime, it should foresee a form of transitory compensation for the allowances indirectly paid by rail for the electric energy that is bought by operators and infrastructure managers.

Also the Energy Taxation Directive (2003/96/EC) should be amended to remove mandatory energy tax exemptions for aviation and maritime shipping and maintain optional energy tax exemptions for energy products and electricity used for goods and passenger transport by rail.

As a last example, Directive 2006/112/EC on the common VAT system should change, with an EU-wide binding exemption for cross-border rail travel.

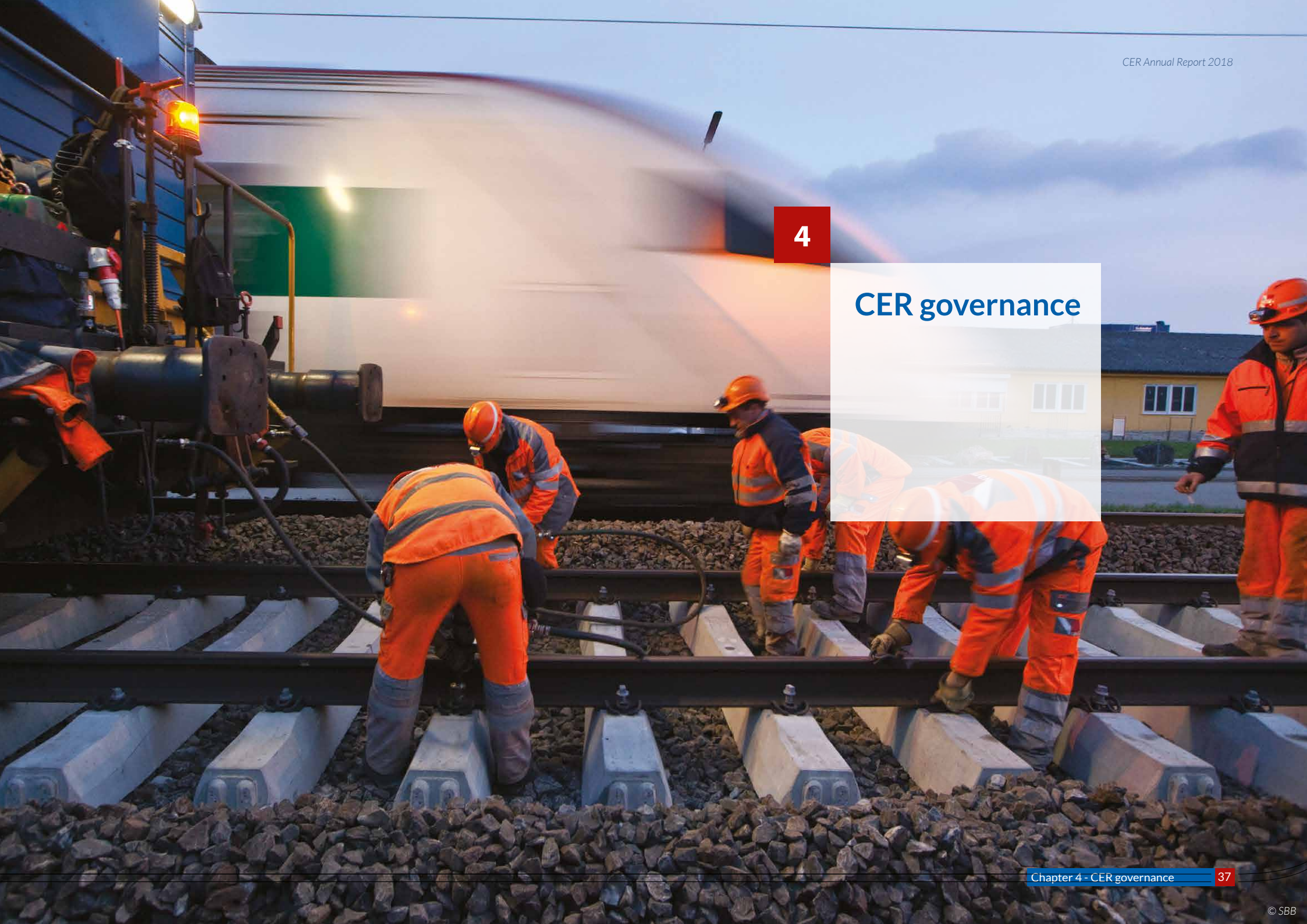
These and other initiatives can be found in the CER Policy Agenda 2019-2024 to be published in spring 2019.



© DSB København

4

CER governance





## 4.1 CER Management Committee (September 2018)



CER Chair

**Crister Fritzson**

Association of Swedish Train Operating Companies (ASTOC)



Vice-Chair

**Ilona Dávid**

Győr - Sopron -  
Ebenfurti Vasút (GYSEV)



Vice-Chair

**Martin Erdössy**

Železnice Slovenskej  
Republiky (ŽSR)



Vice-Chair

**Andreas Matthä**

Österreichische  
Bundesbahnen (ÖBB)



Vice-Chair

**Oliver Wolff**

Verband Deutscher  
Verkehrsunternehmen  
(VDV)



Member

**Richard Lutz**

Deutsche Bahn (DB)



Member

**Krzysztof Mamiński**

Polskie Koleje  
Państwowe (PKP)



Member

**Andreas Meyer**

Schweizerische Bundes-  
bahnen / Chemins de Fer  
Fédéraux Suisses / Ferrovie  
Federali Svizzere (SBB/CFF/  
FFS)



Member

**Geert Pauwels**

Lineas



Member

**Guillaume Pepy**

Société Nationale des  
Chemins de Fer Français  
(SNCF)



Member

**Paul Plummer**

Rail Delivery Group  
(RDG)



Member

**Marc Wengler**

Société Nationale  
des Chemins de Fer  
Luxembourgeois (CFL)



Associated Member

**Edvins Bērziņš**

Latvijas dzelzceļš (LDZ)



Associated Member

**Bernard Guillelmon**

BLS



Associated Member

**Carlos Gomes Nogueira**

Comboios de Portugal  
(CP)



## 4.2 How does CER work?

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

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

### CER General Assembly

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

### CER Management Committee

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

### CER Assistants

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

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

### High-level meetings

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

### Working groups

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

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

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

### Building bridges

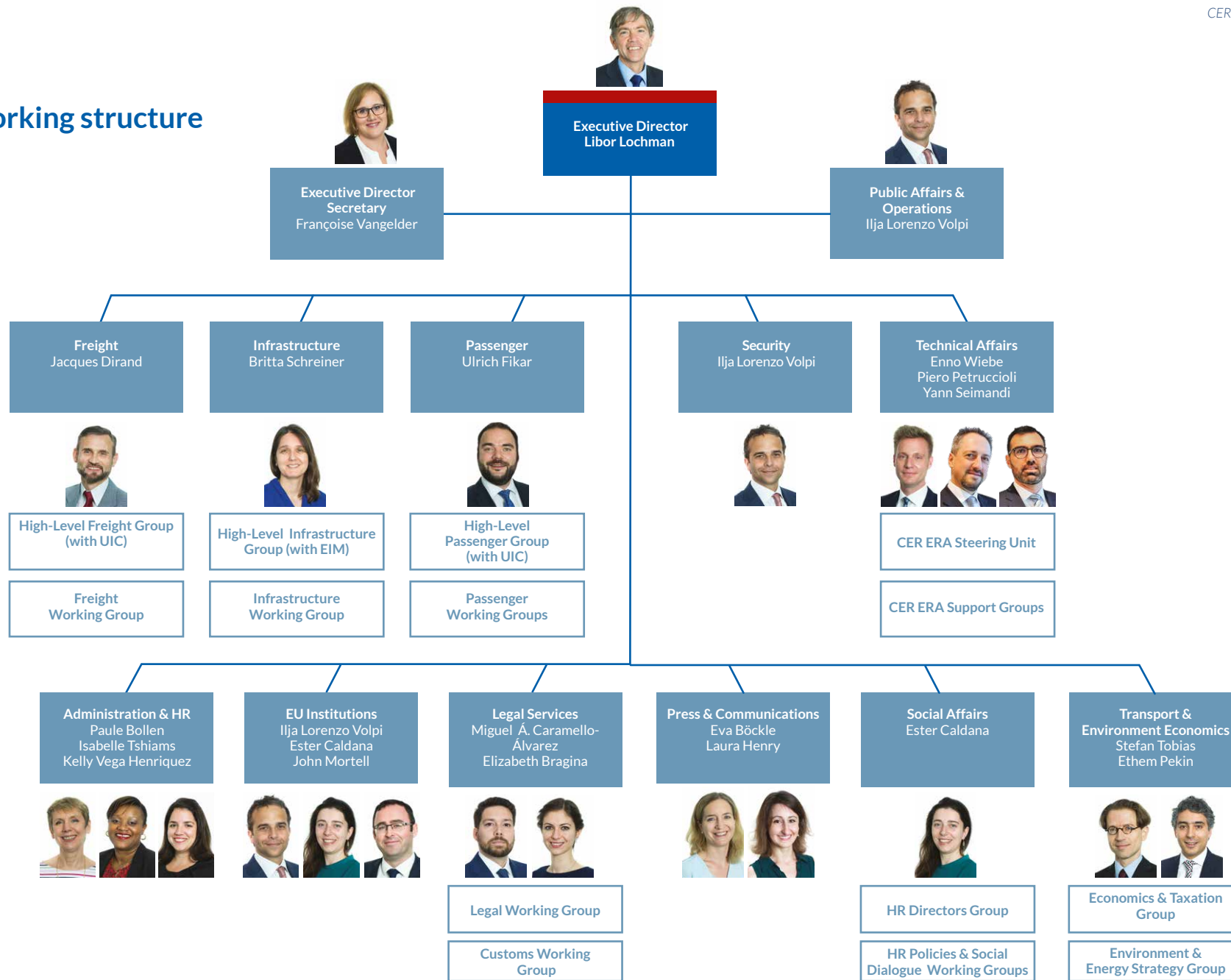
Internally CER follows the principle that opinions of all members are taken into consideration. CER has long-standing experience demonstrating that there is always a way to find compromises among various members' positions when a principle of mutual respect applies. In the same spirit, every member has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

## CER team



Pictured from left to right, and top to bottom: Emanuele MASTRODONATO (until December 2018), Ethem PEKIN, Jean-Baptiste SIMONNET (until August 2018), Ilja Lorenzo VOLPI, Britta SCHREINER, Françoise VANGELDER, Enno WIEBE, Libor LOCHMAN, John MORTELL, Elizabeth BRAGINA, Jacques DIRAND, Kelly VEGA HENRIQUEZ, Stefan TOBIAS, Ulrich FIKAR, Ester CALDANA, Paule BOLLEN, Isabelle TSHIAMS, Eva BÖCKLE, Laura HENRY, Miguel Ángel CARAMELLO ÁLVAREZ.

# CER working structure





## 4.3 Member statistics 2017

CER Member a,b,c,d,e	Country	Length of lines	Passenger-kilometres		Freight tonne- kilometres		Train-kilometres (IM only) <sup>f</sup>	
			in km	millions	Δ% 16/17	millions	Δ% 16/17	millions
ASTOC	SE	-	12,300.0	-4%	21,838.0	2%	-	-
BDŽ Holding	BG	-	1,437.5	-1%	1,632.0 <sup>i</sup>	4%	-	-
BLS	CH	520	1,013.0	3%	2,508.0	3%	14.2	2%
BRC	BG	-	-	-	1,228.0 <sup>i</sup>	55%	-	-
BTS	LV	-	-	-	3,480.0 <sup>j</sup>	n/a	-	-
Bulmarket	BG	-	-	-	1.5	-4%	0.9	11%
ČD	CZ	-	7,778.0	5%	11,819.0	5%	-	-
CFL	LU	275	438.0	5%	-	-	7.7	-4%
CFL Cargo	LU	-	-	-	2,055.0	n/a	-	-
CFM	MD	1,151 <sup>i</sup>	121.5 <sup>i</sup>	0%	793.0 <sup>i</sup>	0%	2.2 <sup>i</sup>	0%
CFR	RO	10,766	-	-	-	-	89.3	2%
CFR Călători	RO	-	5,097.0	14%	-	-	-	-
CFR Marfă	RO	-	-	-	5,039.3	0%	-	-
CP	PT	-	4,032.7	6%	-	-	-	-
DB	DE	33,488	82,520.0	3%	92,651.0	-2%	1,073.0	0%
DSB	DK	-	6,007.0	-2%	-	-	-	-
Eurostar	GB (UK)	-	4,825.3	5%	-	-	-	-
Euskotren	ES	183	370.8	5%	1.6	-11%	-	-
EVR	EE	901	-	-	-	-	5.7	-1%
FS Italiane	IT	16,787	43,646.0	-1%	22,682.0	1%	353.6	1%
GR	GE	1,415 <sup>j</sup>	465.0 <sup>j</sup>	n/a	4,261.0 <sup>j</sup>	n/a	6.4 <sup>j</sup>	n/a
GySEV	HU/AT	509	308.7	0%	1,067.9	36%	7.5	3%
HSB	AL	570	2.4	-24%	25.6	190%	0.2	2%
HUNGRAIL	HU	-	-	-	880.6	26%	-	-
HŽ Cargo	HR	-	-	-	1,970.0 <sup>i</sup>	5%	-	-

CER Member a,b,c,d,e	Country	Length of lines	Passenger-kilometres		Freight tonne- kilometres		Train-kilometres (IM only) <sup>f</sup>	
			in km	millions	Δ% 16/17	millions	Δ% 16/17	millions
HŽ Infrastruktura	HR	2,605	-	-	-	-	21.0	1%
HŽPP	HR	-	745.1	-11%	-	-	-	-
IÉ	IE	1,888 <sup>i</sup>	2,122.0 <sup>i</sup>	n/a	100.0 <sup>i</sup>	n/a	17.7 <sup>i</sup>	n/a
ISR	Israel	1,340 <sup>i</sup>	2,645.0 <sup>i</sup>	0%	1,404.0 <sup>i</sup>	0%	16.0 <sup>i</sup>	0%
JR East	Japan	7,458	130,068.0 <sup>i</sup>	0%	-	-	-	-
LDZ	LV	1,860	42.3	5%	9,971.0	-16%	16.7	1%
LG	LT	1,911	424.2	7%	15,413.5	12%	15.3	6%
Lineas	BE	-	-	-	5,656.8	11%	-	-
MÁV	HU	7,246	5,473.0	2%	-	-	101.2	1%
Montecargo	ME	-	-	-	111.0 <sup>i</sup>	0%	-	-
MŽ Infrastructure	MK	683	-	-	-	-	1.8	-8%
MŽ Transport	MK	-	59.1	-36%	155.8	15%	-	-
NRIC	BG	4,030	-	-	-	-	29.9	2%
NS	NL	-	17,990.0	2%	-	-	-	-
NSB	NO	-	3,096.0	-5%	-	-	-	-
ÖBB	AT	4,962	11,183.4	n/a	32,927.5	n/a	148.6	n/a
OSE	EL	2,240	-	-	-	-	11.0 <sup>p</sup>	6%
PKP	PL	18,513	10,391.0	n/a	29,344.0	n/a	235.2	n/a
Rail Polska	PL	28 <sup>i</sup>	-	-	826.0 <sup>i</sup>	0%	1.2 <sup>i</sup>	0%
RDG	GB (UK)	-	68,911.0	1%	-	-	-	-
Renfe	ES	-	26,060.4	3%	6,609.9	1%	-	-
SBB CFF FFS	CH	3,232	18,219.3	0%	8,719.8	1%	182.3	-1%
SLB	AT	-	58.0 <sup>i</sup>	0%	225.0 <sup>i</sup>	0%	-	-
SNCB/NMBS	BE	-	10,364.3	3%	-	-	-	-

CER Member a, b, c, d, e	Country	Length of lines	Passenger-kilometres		Freight tonne-kilometres		Train-kilometres (IM only) <sup>f</sup>	
		in km	millions	Δ% 16/17	millions	Δ% 16/17	millions	Δ% 16/17
SNCF	FR	28,120	90,225.9	7%	18,729.2	4%	476.0	1%
SŽ	SI	1,209	650.1	-4%	4,447.4	12%	20.4	3%
SŽDC	CZ	9,408	-	-	-	-	167.7	3%
Thalys	BE	-	2,587.5	12%	-	-	-	-
TRAINOSE	EL	-	1,112.0	-7%	358.0	41%	-	-
Trasse Schweiz <sup>g</sup>	CH	-	-	-	-	-	196.3	-1%
UZ	UA	20,975 <sup>i</sup>	37,577.0 <sup>i</sup>	0%	195,054.0 <sup>i</sup>	0%	200.3 <sup>i</sup>	0%
VDV	DE	38,466 <sup>j</sup>	84,200.0 <sup>j</sup>	0%	101,200.0 <sup>j</sup>	0%	n/a	n/a
VPE <sup>h</sup>	HU	-	-	-	-	-	108.6	1%
VR Group	FI	-	4,271.0	10%	10,308.5	9%	-	-
WKO	AT	475	180.0	0%	390.0	0%	-	-
ŽFBH	BA	601	21.9	70%	730.0	-5%	2.7	10%
ŽICG	ME	249 <sup>k</sup>	-	-	-	-	0.6 <sup>k</sup>	0%
ŽRS	BA	417	7.4	-34%	384.0	4%	1.3	-10%
ŽS Infrastructure	RS	3,736	-	-	-	-	15.4	-5%
ŽS Passenger	RS	-	377.8	-14%	-	-	-	-
ŽSR	SK	3,626	-	-	-	-	50.6	2%
ŽSSK	SK	-	3,759.7	18%	-	-	-	-
ŽSSK Cargo	SK	-	-	-	7,073.0 <sup>l</sup>	n/a	-	-

- Not applicable  
n/a Not available

- a MRCE (NL), a rolling stock leasing company, is a member of CER. Since it is not a railway company it cannot be listed in the table.
- b Eurail (NL), a general sales organisation for Rail Passes, is a member of CER. Since it is not a railway company it cannot be listed in the table.
- c High Speed 2 (HS2) (UK) is a member of CER but is not listed in the table since operations have not yet begun.
- d RB Rail AS is a partner member of CER. Established as a joint venture, RB Rail AS acts as the main coordinator of the Rail Baltica project, a rail infrastructure project linking the Baltic States to the European rail network with a standard gauge rail line. Since it is not a railway company it cannot be listed in the table.
- e ŽS (Serbian Railways JSC) is a member of CER. The company was created on 10 August 2015 along with three other joint stock companies. ŽS is not listed in the table because it does not operate rail traffic or manage rail infrastructure. ŽS provides engineering and technical consulting, as well as information technology services, and carries out accounting and bookkeeping activities, and manages real estate.
- f Train-path kilometres from the point of view of the infrastructure manager.
- g Trasse Schweiz is an independent path allocation body. The mentioned "train kilometres" are the path-kilometres allocated in 2017 on the networks of SBB, BLS and the Swiss South-Eastern Railways (SOB). Trasse Schweiz is a not-for-profit organisation.
- h VPE is a train path allocation body. As such, it allocates train paths and constructs the timetable, but is not responsible for the operation and maintenance of the infrastructure.
- i 2016 data
- j 2015 data
- k 2012 data
- l UIC data
- p provisional

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

Design and production: www.inextremis.be (mp5885). Photos: Kindly provided by CER members and AdobeStock. Printed in Belgium in January 2019

Disclaimer: CER, nor any person acting on its behalf, may be held responsible for the use to which information contained in this publication may be put, nor for any errors which may appear despite careful preparation and checking.

Reproduction is authorised, provided the source is acknowledged.





*The Voice of European Railways*

**COMMUNITY OF EUROPEAN RAILWAY  
AND INFRASTRUCTURE COMPANIES**

CER aisbl  
Avenue des Arts, 53 - 1000 Bruxelles

Tel: +32 2 213 08 70  
Fax: +32 2 512 52 31

[contact@cer.be](mailto:contact@cer.be)  
[@CER\\_railways](https://twitter.com/CER_railways)

[www.cer.be](http://www.cer.be)