5. Evaluierung der bisher gesetzten Schritte bei der Restruktierung der Bahnen. Schlussfolgerungen der Europäischen Kommission

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Summary

1. Facts and Figures
2. European policy: toward an integrated European railway area
3. What is the state of play today?
4. What are the main challenges?
5. Conclusions

Facts and Figures of European Railways

1. Evolution of the rail freight traffic

Freight transport by rail (in bln tkm) for EU-25, EU-15 and EU-10, 1970-2004

• Decrease since 1970, but a turnaround since 2003 when freight traffic started to increase again in EU-25

Source: Eurostat, UIC, DG TREN estimates, national statistics. Data for the UK refer to Great-Britain only. The data for the Czech Republic and Slovakia before 1993 have been added to the total for EU-25.
Facts and Figures of European Railways

1. Evolution of the rail freight traffic

- Modest improvement of performance in several Member States since 2000 (particularly in EU-15)

Source: Eurostat, UIC, DG TREN estimates, national statistics

Share of international and transit transport by rail in 2004 for EU-25, EU-15 and EU-10

- Illustration of the importance of international and transit traffic

Source: Eurostat
Changes in national and international rail freight transport 2003-2004

Highest performance increases in countries with open markets (DE, UK)

Facts and Figures of European Railways

2. Evolution of the rail passenger traffic

• gradual increase between 1995 and 2004, even though the new Member States witnessed a significant decline of passenger transport flows

Passenger transport by rail (in bln pkm) for EU-25, EU-15 and EU-10, 1970-2004

Source: Eurostat, UIC, national administrations, DG TREN estimates.
2. Evolution of the rail passenger traffic

• Negative trend in the new Member States for passenger traffic

Source: Eurostat, UIC, DG TREN estimates, national sources

3. State of play of the openness of the rail freight market

• market opening works: Member States that have opened their freight market to competition have seen an increase in rail freight transport

Source: Consortium analysis from country reports. The networks of France, Greece, Ireland, Luxembourg, Northern Ireland, Portugal, Slovenia and Spain still had a single freight operator in 2004
Facts and Figures of European Railways

3. Employment

Employment distribution in 2005 in EU25

<table>
<thead>
<tr>
<th>Year</th>
<th>Incumbents</th>
<th>Infrastructure managers</th>
<th>New operators</th>
</tr>
</thead>
<tbody>
<tr>
<td>1970</td>
<td>62.085</td>
<td>939.625</td>
<td>131.020</td>
</tr>
</tbody>
</table>

Employment (1000 employees) between 1970 and 2000 in EU15

Source: EU, Statistical Pocket book

4. Safety

Number of railway passengers killed in accidents involving railways

Source: EU, Statistical Pocket book
Facts and Figures of European Railways

5. Public Support

- A yearly total amount in EU25 around 50 billion € which concern
  - Compensations for Public Service Obligations
  - Maintenance –related investments on infrastructure
  - New infrastructure investments
  - State-aids for restructuring or diminishing debts levels
  - Personal charges
1. Ensuring an open and non discriminatory access to the European infrastructure
   - 1993: International Combined Transport
   - 2003: International freight services on the TERFN
   - 2006: International freight services on the whole network
   - 2007: all freight services
   - 2008: PSO regulation:
     - choice of direct allocation or tendering
     - obligation to conclude a public service contract
   - 2010 (?): International passenger services including cabotage
   - ??: Domestic passenger services

2. Guaranteeing a high level of safety - Directive on railway safety (2004/49)
   - Creation of national safety authority in each Member State. Coordination by ERA.
   - Delivery of safety certificate to RUs and I.M.
   - Common safety indicators, methods and targets
   - Creation of independent investigation bodies for accidents
   - Key role of ERA
3. Developing the interoperability of the railway system

- High Speed Rail (Dir. 96/48)
  - 6 technical specifications for interoperability (TSI) for the whole system in force since 30 Nov. 2002. Revision by end 2006.

- Conventional Rail (Dir. 2001/16)
  - TSI developed for freight operations: Wagons, Control-Command and Operations,
  - TSI to be adopted: PRM, tunnel safety

- Possible extension to the whole network from 2008 (Dir. 2004/50)

4. Developing Social Dimension

- Social Dialogue
- Council Directive 2005/47/EC on certain aspects of the working conditions of mobile workers engaged in interoperable cross-border services
- Train crew certification
- Study on training centres to be launched
- Participation in ERA working group of trade unions representations
5. Few steps towards a fairer intermodal competition

- Social Regulations on road: working time, digital tachygraph
- Reinforcement of round checks
- Integrating ticketing process between air/rail
- Programme Marco Polo

6. State Aids guidelines for a better regulation of an open market to competition

- Avoiding distortion of competition (cross-financings, discriminatory actions)
- Progressing towards an integrated market
- Nothing to do with privatisation (neutrality of the Commission towards a private or public owned company)
What is the state of play today?

- Restructuration of historic Railway Undertakings
- Appearance of new players in all EU countries and historic operators entering neighbouring territories
- Creation of European players: Railion, European Bulls, ERS, EWS, SBB, NS, DSB, RCA, Veolia Environment, Arriva, Keolis, First Group
- Cooperation of infrastructure managers: RailNetEurope
- Cooperation of regulatory bodies and national competition authorities
- Standardisation of railway equipment: economies of scale and reduction of costs to achieve
- Coordination of investments: European Coordinator for ERTMS, Brenner, Lyon-Torino, Rail Baltica …

What are the main challenges?

- Public Regulation of railway sector not yet well ensured everywhere: lack of administrative capacity (human, financial resources and competences) resulting in a lack of confidence by players
- Restructuration still ongoing and stable framework not yet set up
- Fragmented legal provisions governing safety and interoperability and inconsistent operational rules: key role of ERA to create simpler and harmonized rules
- Cross-acceptance of existing rolling stock
What are the main challenges?

- Financing of railway by State is not well organised:
  - Adverse Charging policy in several Member States (see graph)
  - Public service obligation not compensated in many new Member States
  - Maintenance strategy for the network

Need of clear commitments of the State to finance maintenance and PSO
### What are the main challenges?

- **Inconsistent transport policies:** especially between road and rail
  - Charging road in line with rail charging
  - Infrastructure programming and financing
- **Insufficient finances for infrastructure development at EU level**
  - See graph
What are the main challenges?

- Priority projects: remaining investment by type of infrastructure

Investment cost 225 billion € until 2020

- New Rail Projects 57%
- Upgrade Rail Projects 21%
- Upgrade road projects 4%
- New road projects 6%
- Tunnels 5%
- Inland waterways 1%
- Airports 1%
- Mixed projects and Galileo 1%

Big Social Challenge:

- Making rail attractive for young people
- Ensuring continuity of competences
- Very old pyramid of age in many Railway Undertakings
- Innovation
- Customer oriented vs production oriented
Conclusions

- In the middle of a heavy process: target is 2010
- No reason to change the objectives
- First results are encouraging
- General Transport policy is key determinant of railway development
- Collective tasks of States and all the market players as well as EU

For further information:

Site:
http://europa.eu.int/comm/transport/rail/index_en.html