Activities of the European Commission in rail transport

77th session of the UNECE Working Party on Rail Transport
EU rail transport policy framework
The railway sector in the European Union

- **Length of railway network** = 200,000 km, including 11,526 km of high-speed lines by end of 2020 (+13% compared to 2015)

- **Electrification** = 81,6% of total train*km powered by electricity;

- **GHG emissions** = rail accounts for 0,4% of EU GHG transport emissions and 1.9% of transport energy consumption

- **Modal share** (rail vs. land transport)
  - 6% passenger services
  - 17% freight services

- **Use of railway network** (of total train*kilometres)
  - 79% passenger services
  - 21% freight services

- **Socio-economic dimension**: 910,000 people in the EU27 work in the railway sector (operators, infra managers)

(source: 8th Rail Market Monitoring Survey Report)
From a “patchwork system” to a European network

Integrated approach

National network A  National network B
Domestic monopoly  Domestic monopoly
operator A          operator B

Single Rail Area - harmonised rules and standards
Operators work seamlessly across borders (in competition)
Towards a Single European Rail Area

User perspective (vision)

- Go everywhere carriers and vehicles
- Open, competitive and integrated markets (passenger, freight, domestic, international)
- Harmonised technical rules at EU level (elimination of national rules)
- Capacity allocation management and traffic management at EU level
Structure of the EU rail transport acquis

- **Market pillar** (economic regulation, market access, public service contracts)
- **Technical pillar** (safety, interoperability)
- **European Union Agency for Railways (ERA)**
  - Technical specifications for interoperability (TSIs) and Common Safety Methods (CSMs)
- Train driver licensing
- Rail Freight Corridors
- Transport of dangerous goods
- Passenger rights, ticketing
- Social field - working time / hour
- Trans-European Network & Connecting Facility
Opening up of markets for rail transport services

- **Fourth railway package (2016)**
  - Domestic passenger service (competitive award for public service contracts) 2023

- **Recast of first package (2012)**
  - Domestic passenger services (open access) 2020

- **Rail freight corridor Regulation (2010)**
  - International passenger services 2010

- **Third railway package (2007)**
  - Domestic freight services 2007
  - International freight on entire network 2006

- **Second railway package (2004)**
  - International freight on TEN-T freight network 2003

- **First railway package (2001)**
  - International combined transport of goods & international groupings 1993

- **First rail market legislation (1991)**
Rail safety and interoperability

- EU rail transport policy is geared towards the creation of a **single European railway area (SERA)** – within the SERA we pursue the objective of “**one set of EU rules**” on:
  - **Common Technical Specifications of Interoperability (TSI)** for vehicles and infrastructure and data exchange and communication between operators and infra manager (TSI package 2023)
  - **Joint signalling system** (e.g. ERTMS, new radio, automated driving)
  - **Common safety and operating rules** built upon technical and signalling specs
  - **Common framework for train divers**, a revision of which is under development
  - and harmonisation, and full interoperability across the EU without borders.
Smart and Sustainable Mobility Strategy – December 2020

• Our vision for the future of European transport and mobility

• Three objectives: making the European transport system more sustainable, smart and resilient

• 10 flagship areas with key milestones

• Action plan with a list of concrete policy actions

✓ rail freight traffic should increase its market share by **50% by 2030** and **double it by 2050**

✓ traffic on high-speed rail should **double by 2030** and **triple by 2050**
External dimension of the EU rail transport policy
EEA, Enlargement and Neighbourhood policy

- **European Economic Area (EEA)**: EU + members of the European Free Trade Agreement (EFTA): Iceland, Liechtenstein, Norway and Switzerland

- **Candidate countries for EU membership**: Turkey, Albania, Bosnia & Herzegovina, Kosovo*, Montenegro, North Macedonia, Serbia, Georgia, Moldova, Ukraine

- **Specific instruments on transport cooperation**: Transport Community Treaty (Western Balkans), EU-Switzerland Land Transport Agreement

- **Eastern Partnership**: Armenia, Azerbaijan, Belarus, Georgia, Moldova, Ukraine

- **Southern Partnership**: Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Palestine*, Syria, Tunisia
International transport organisations

• Intergovernmental Organisation for International Carriage by Rail (OTIF)
  > Long Term Strategy

• United Nations Economic Commission for Europe (UNECE) Inland Transport Committee
  > Unified Railway Law initiative

• Western Balkans - Transport Community (TC)
  > Regional Rail Strategy, IPA III
Current EU connectivity policies involving railways

• Indicative TEN-T extended maps
  Extension of the trans-European transport network to neighboring countries: Armenia, Azerbaijan, Georgia, Norway, Switzerland, Moldova, Turkey, Ukraine, Western Balkans

• Connecting Europe and Asia - Building blocks for an EU Strategy
  Joint Communication of the Commission and of the High-Representative of the Union for Foreign Affairs and Security Policy (September 2018)

• The Global Gateway
  Joint Communication of the Commission and of the High-Representative of the Union for Foreign Affairs and Security Policy (December 2021)

• Action plan for EU-Ukraine Solidarity Lanes to facilitate Ukraine's agricultural export and bilateral trade with the EU
  Communication of the Commission (May 2022)
Between March 2022 and October 2023, over **57 million tonnes** of grain, oilseeds, and related products have left Ukraine through the Solidarity Lanes. They enabled the export of around 60% of Ukraine's grain since the start of the war. 40% of Ukrainian grain has been exported via the Black Sea Grain Initiative.

The Solidarity Lanes have allowed Ukraine to import nearly **34 million tonnes** of goods it needs, for the benefit of both Ukraine and the export and transit countries.
Global Gateway: EU-Central Asia transport links

“Study on Sustainable Transport Connections between Europe and Central Asia”
(EBRD, EC, June 2023)

• Identify the most sustainable transport corridors connecting Central Asian economies with the extended Trans-European Transport Network, following assessment based on sustainability criteria and stakeholder consultations

• Propose key actions for corridor development including actual infrastructure investments and the necessary enabling environment, including their prioritization based on a coherent and sustainable development strategy

Trans-European Transport Network
Context of the revision process

Revision as opportunity to modernise the current legal framework and to step up efforts in aligning TEN-T with the new priorities of the European Green Deal and the Sustainable and Smart Mobility Strategy

**European Green Deal:**
- ✓ 90% reduction in GHG -> e.g. inland freight carried today by road to be shifted to rail and inland waterways

**Sustainable and Smart Mobility Strategy:**
- ✓ rail freight traffic should increase its market share by **50% by 2030** and **double it by 2050**
- ✓ traffic on high-speed rail should **double by 2030** and **triple by 2050**
- ✓ scheduled collective travel under 500 km to be carbon-neutral by 2030 within the EU
- ✓ at least 100 climate-neutral cities in Europe by 2030
New TEN-T provisions

- **New network structure**: core, extended core and comprehensive network together forming the trans-European transport network (TEN-T)
- **Intermediary deadline** of 2040
- **Reinforced / new infrastructure standards** for all transport modes
- **Strengthened TEN-T governance**
Gradual network completion in three steps

**2030**
- Core network completion with regard to 2013 TEN-T standards

**2040**
- Completion of the extended core network sections (part of European Transport Corridors)
- Newly introduced TEN-T standards on core and extended core network
- ERTMS deployment on extended core and comprehensive network

**2050**
- Completion of comprehensive network
European Transport Corridors

- Integration of Core Network Corridors and Rail Freight Corridors
- Composed of most strategic parts of the core network and of the extended core network (deadlines 2030 & 2040)
- Amended TEN-T proposal of July 2022: extension of 4 ETCs to Ukraine & the Republic of Moldova
# TEN-T policy revision process and timeline

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
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</thead>
<tbody>
<tr>
<td><strong>Legal proposal</strong></td>
<td>14 December 2021</td>
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<tr>
<td><strong>Amended proposal</strong> to address new geopolitical context**</td>
<td>27 July 2022</td>
</tr>
<tr>
<td><strong>Council General Approach</strong></td>
<td>5 December 2022</td>
</tr>
<tr>
<td><strong>European Parliament report and negotiation mandate</strong></td>
<td>13 April 2023</td>
</tr>
<tr>
<td><strong>Trilogues</strong></td>
<td>4 political trilogues completed</td>
</tr>
<tr>
<td><strong>Adoption and entry into force of revised Regulation</strong></td>
<td>envisaged by spring 2024</td>
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Rail transport policy developments
2023 TSI revision package (in force)

• Harmonisation of interoperability across borders

• Updating specifications to incorporate technical progress and innovation

• inter alia composed of:

➢ the new regulation Control Command and Signalling TSI (CCS TSI)

• Supporting the further deployment of ERTMS
• Introduces modularity
• Ensures readiness for automatic train operation (ATO) over ERTMS, and the
• Future Railway Mobile Communication System (FRMCS)
• Optimises braking curve models
• Allows deployment of ETCS Level 2 with moving blocks
• Includes an on-board train integrity solution
2023 TSI revision package (in force)

➢ Amendments to the Operation and Traffic Management TSI (OPE TSI)

- Harmonises the operating principles of trains on the rail system of the EU, and particularly under ERTMS
- Supports digitalisation of railway operations, in particular information exchange between railway undertakings and infrastructure managers
- Harmonisation of the professional requirements for staff executing safety critical tasks

➢ Important changes in other TSIs:

- Introduction of the “unique authorisation” concept for coaches
- Inclusion of harmonised requirements relating to combined transport
- Framework for upgrading of rail infrastructure
New technical specification for interoperability on rail interoperable data sharing (TSI Telematics)

- Business-to-business digital systems for data sharing supporting the following processes:
  - Capacity management, train composition, traffic management
  - Management of freight wagons and shipments
  - Distribution of rail passenger services and passenger information

- Strengthened governance under the aegis of ERA as system authority for telematics

- Deadlines and enforcement measures, incl. a national enforcement coordinator for enforcement tasks’ allocation to existing enforcement bodies

- ERA Ontology of the rail system as building block of the European Mobility Data Space (EMDS)
New Regulation on rail vehicle registration

- Seamless and leaner process from autorisation to registration
- Free choice between registration entities of Member State or the European Union Agency for Railways (ERA)
- Public access to vehicle registration data (technical characteristics and related organisations)
- Automation of data update in the European Vehicle Register exploiting synergies with other registers
Proposal for a regulation on capacity management

• **COM(2023) 443/2** of 11 July 2023 (amending Directive 2012/34/EU)

• New rules for the **management of rail infrastructure capacity** and cross-border traffic within the EU

• Promoting efficient use of the train network:
  
  ➢ Encouraging **long-term planning** while **safeguarding capacity** for different rail market segments

  ➢ **Single legal framework** for rail infrastructure capacity management (passenger / freight; domestic / cross-border)

  ➢ **Strengthens coordination** between national infrastructure managers
Proposal for a regulation on capacity management

• Chapter I: Scope and subject matter

• Chapter II: Management of infrastructure capacity
  — Section 1: General provisions
  — Section 2: Strategic capacity planning
  — Section 3: Scheduling and capacity allocation
  — Section 4: Adaptation and rescheduling

• Chapter III: Traffic management, disruption management and crisis management

• Chapter IV: Performance review

• Chapter V: European Network for coordination

• Chapter VI: Regulatory oversight of capacity and traffic management
  — Section 1: Regulatory bodies
  — Section 2: Tasks and responsibilities of the European Network of Rail Regulatory Bodies

• Chapter VII: Final provisions
8th Rail Market Monitoring Survey (RRMS) report – Sept. 2023
Evolution of passenger and freight volumes (2005-2020)
Proportion of cross-border traffic

3.6% Passenger traffic

2020 data. Prior to the COVID outbreak, the proportion of cross-border rail passenger traffic was 7%
Market share of incumbents vs. new entrant companies

National passenger markets

- Alternative operators
- Incumbents

Freight market

- Market share of alternative operators
- Market share of the incumbents

46%

↑ 12 p.p. since 2015

14%

↑ 2 p.p. since 2015
Thank you!