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 network per million people
(2020)

- Over 1 000 line-km
- 500 – 1 000 line-km
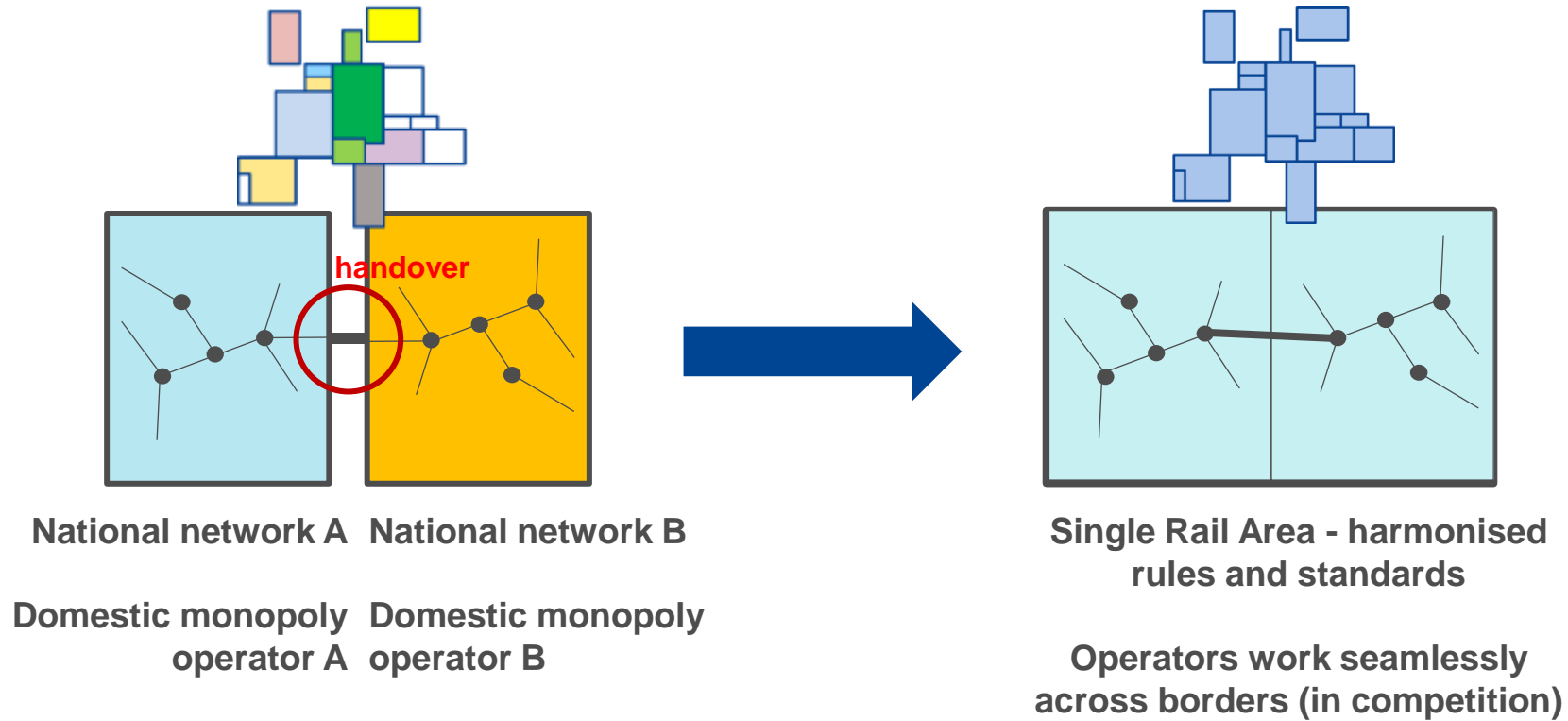- 250 – 500 line-km
- Under 250 line-km

- **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)

European Commission

From a "patchwork system" to a European network

Integrated approach

National network A   National network B

Domestic monopoly operator A   Domestic monopoly operator B

Single Rail Area - harmonised rules and standards

Operators work seamlessly across borders (in competition)

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Towards a Single European Rail Area

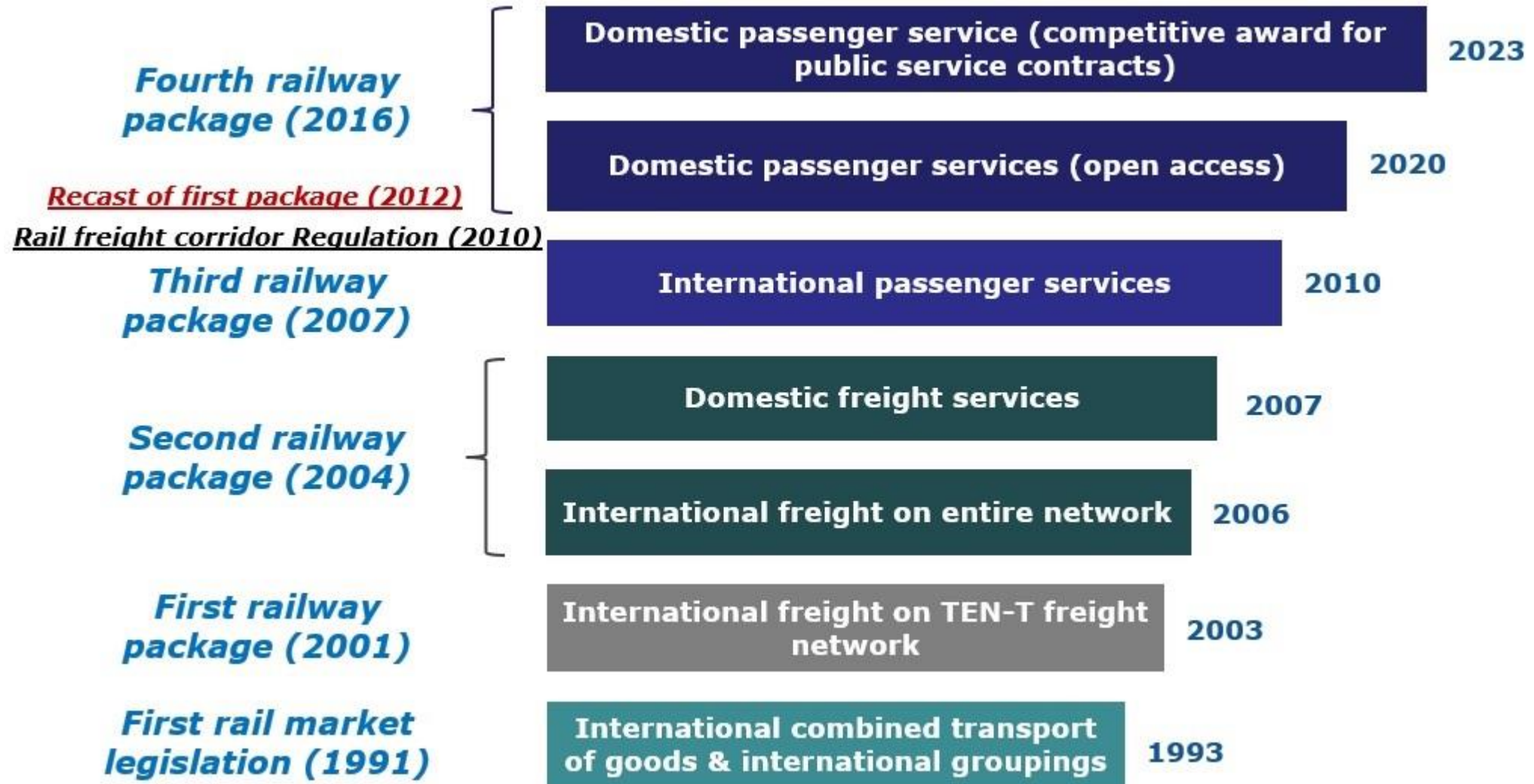*User perspective (vision)*

- 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

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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)

Recast of first package (2012)

Rail freight corridor Regulation (2010)

Third railway package (2007)

Second railway package (2004)

First railway package (2001)

First rail market legislation (1991)

Service	Year
Domestic passenger service (competitive award for public service contracts)	2023
Domestic passenger services (open access)	2020
International passenger services	2010
Domestic freight services	2007
International freight on entire network	2006
International freight on TEN-T freight network	2003
International combined transport of goods & international groupings	1993

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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**

European Commission

External dimension of the EU rail transport policy

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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, <u>Georgia</u>, <u>Moldova</u>, <u>Ukraine</u>

- **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

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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)

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EU-Ukraine Solidarity Lanes

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
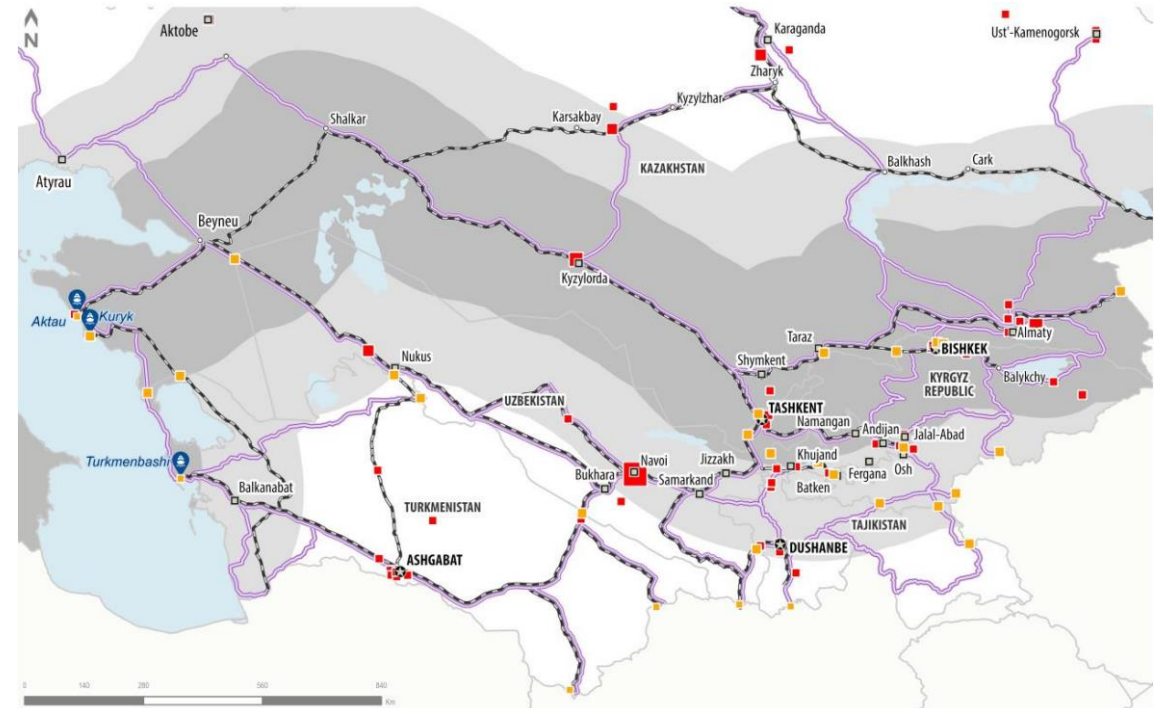
https://transport.ec.europa.eu/transport-themes/international-relations/study-sustainable-transport-connections-central-asia_en

Trans-European Transport Network

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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

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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**

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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

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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
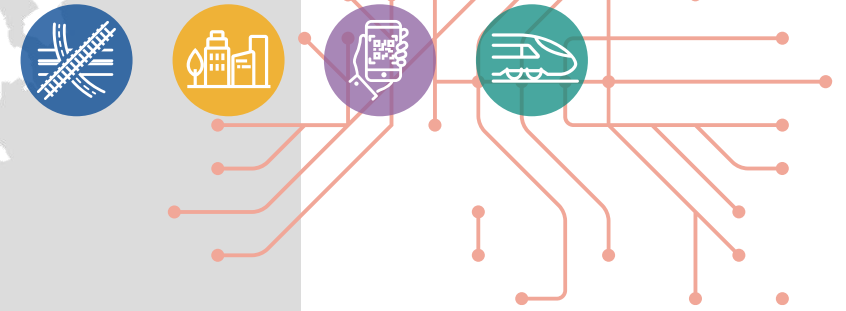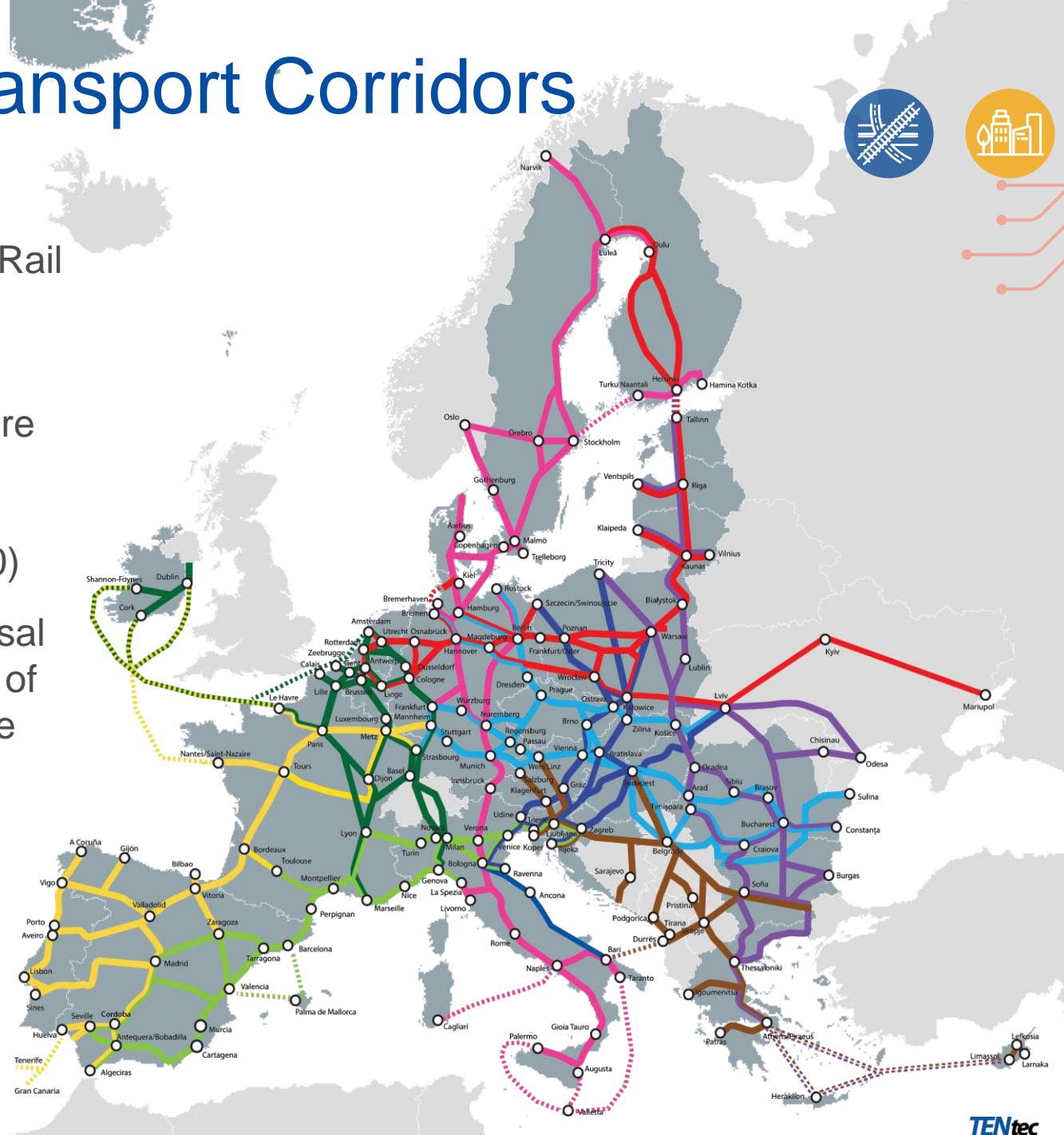
ATLANTIC

NORTH SEA - RHINE - MEDITERRANEAN

NORTH SEA - BALTIC

SCANDINAVIAN – MEDITERRANEAN

BALTIC SEA - ADRIATIC SEA

RHINE - DANUBE

MEDITERRANEAN

WESTERN BALKANS - EASTERN MEDITERRANEAN

BALTIC SEA - BLACK SEA - AEGEAN SEA

TENtec

European Commission

TEN-T policy revision process and timeline

Legal proposal: 14 December 2021

Amended proposal to address new geopolitical context: 27 July 2022

Council General Approach: 5 December 2022

European Parliament report and negotiation mandate: 13 April 2023

Trilogues: 4 political trilogues completed

Adoption and entry into force of revised Regulation: envisaged by spring 2024

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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

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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

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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
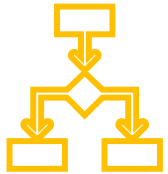- ERA Ontology of the rail system as building block of the European Mobility Data Space (EMDS)

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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

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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

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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**

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8th Rail Market Monitoring Survey (RRMS) report – Sept. 2023

Evolution of passenger and freight volumes (2005-2020)
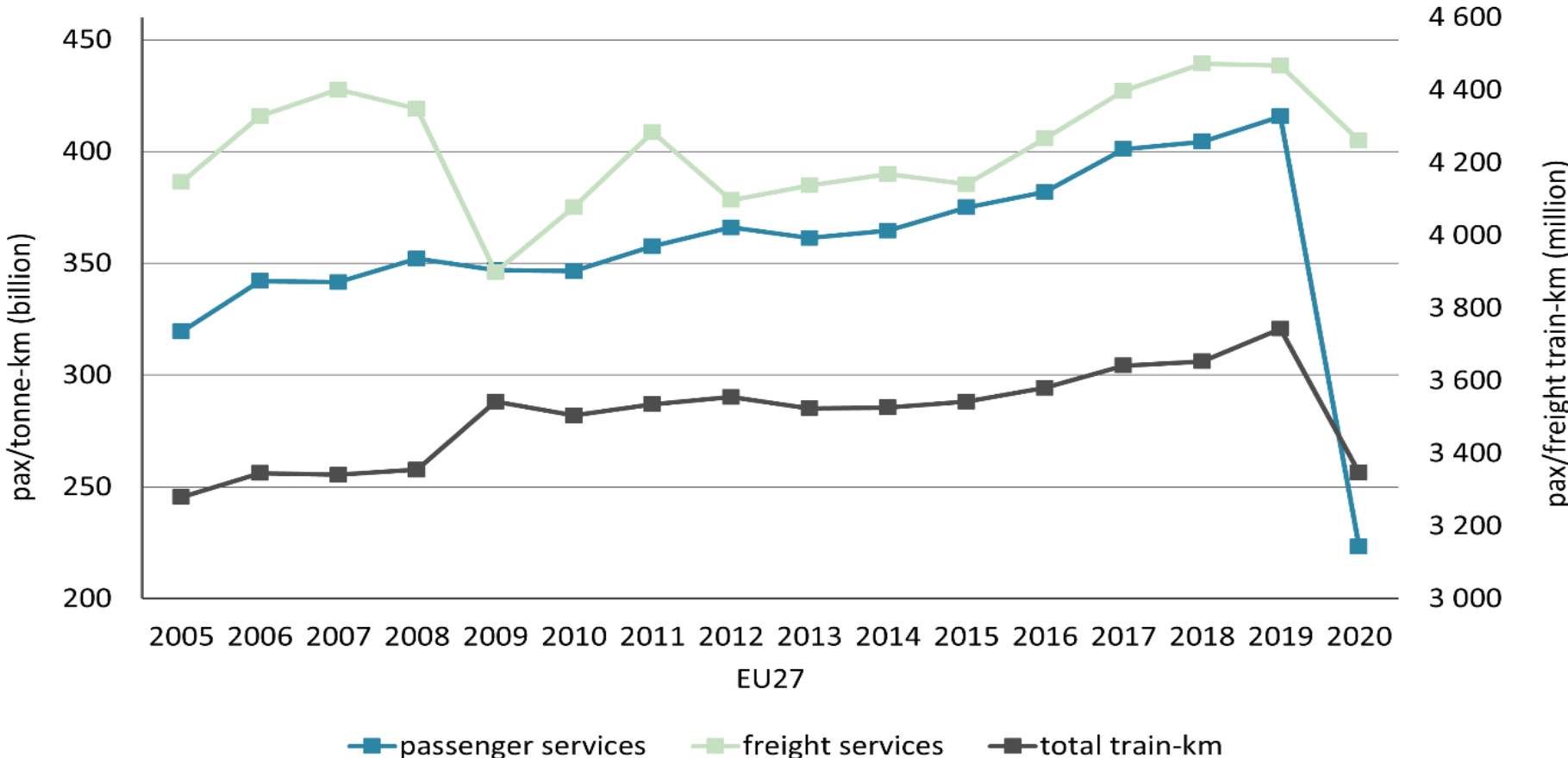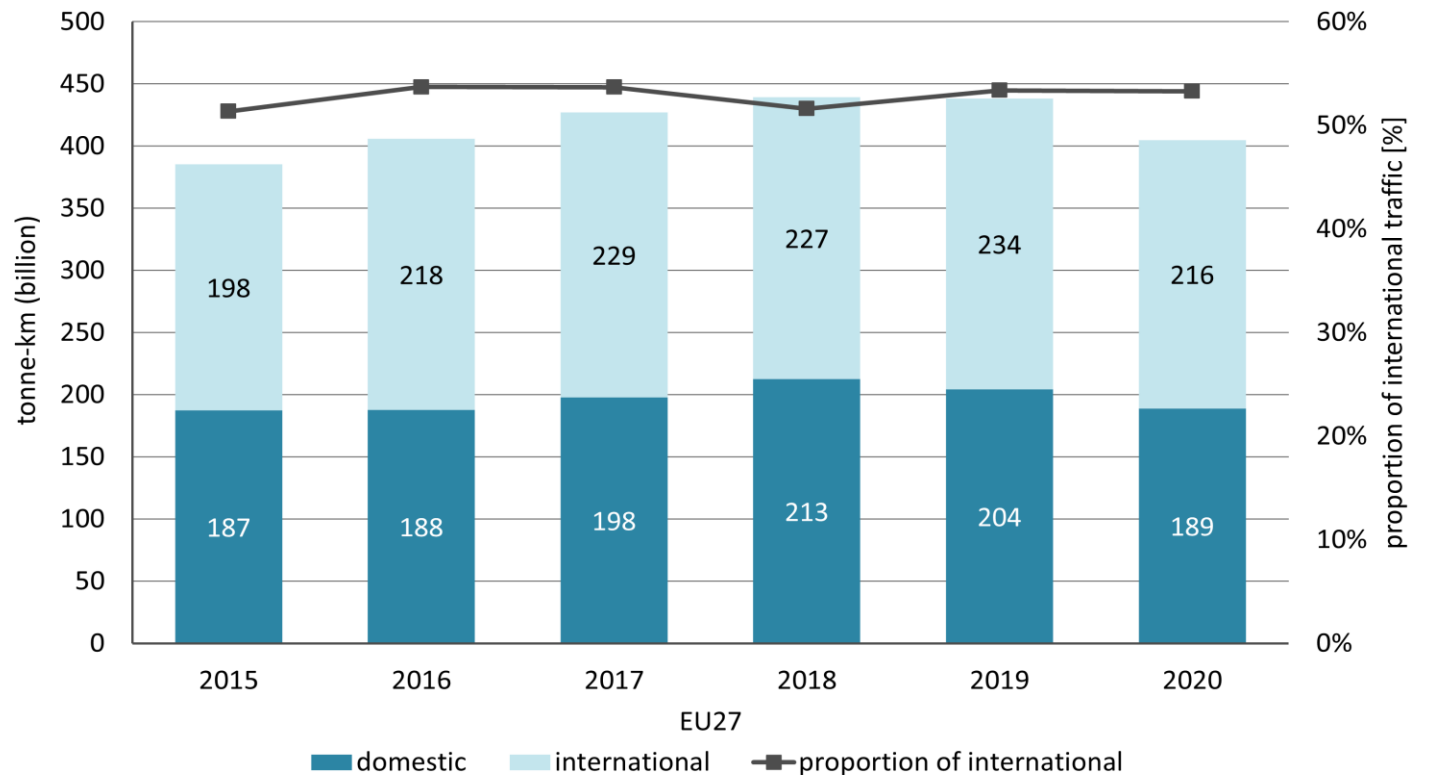
Proportion of cross-border traffic

3,6% Passenger traffic

2020 data. Prior to the COVID outbreak, the proportion of cross-border rail passenger traffic was **7%**

53% Freight traffic

Market share of incumbents vs. new entrant companies

Alternative operators
Incumbents
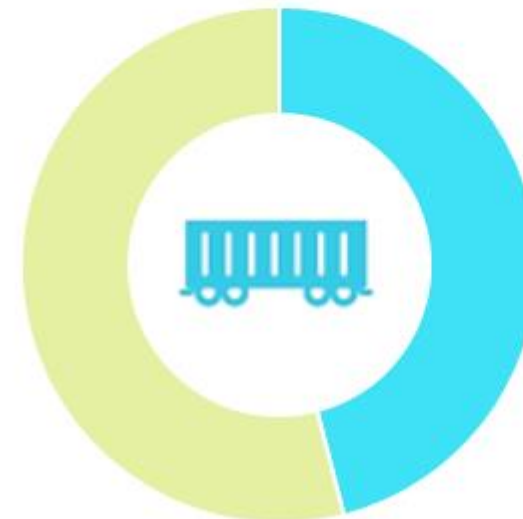
National passenger markets

14%
↑**2** p.p. since 2015

Freight market

Market share of alternative operators
Market share of the incumbents

46%
↑ 12 p.p. since 2015

European Commission

Thank you!