



*The Voice  
of European  
Railways*

# Building the Single European Rail Area

*European Rail Summit 2016*

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# Three key elements of the sustainable rail development



Intermodal level playing field

Intramodal competition

Infrastructure

**SERA**



# Single European Railway Area (SERA) - two pillars:

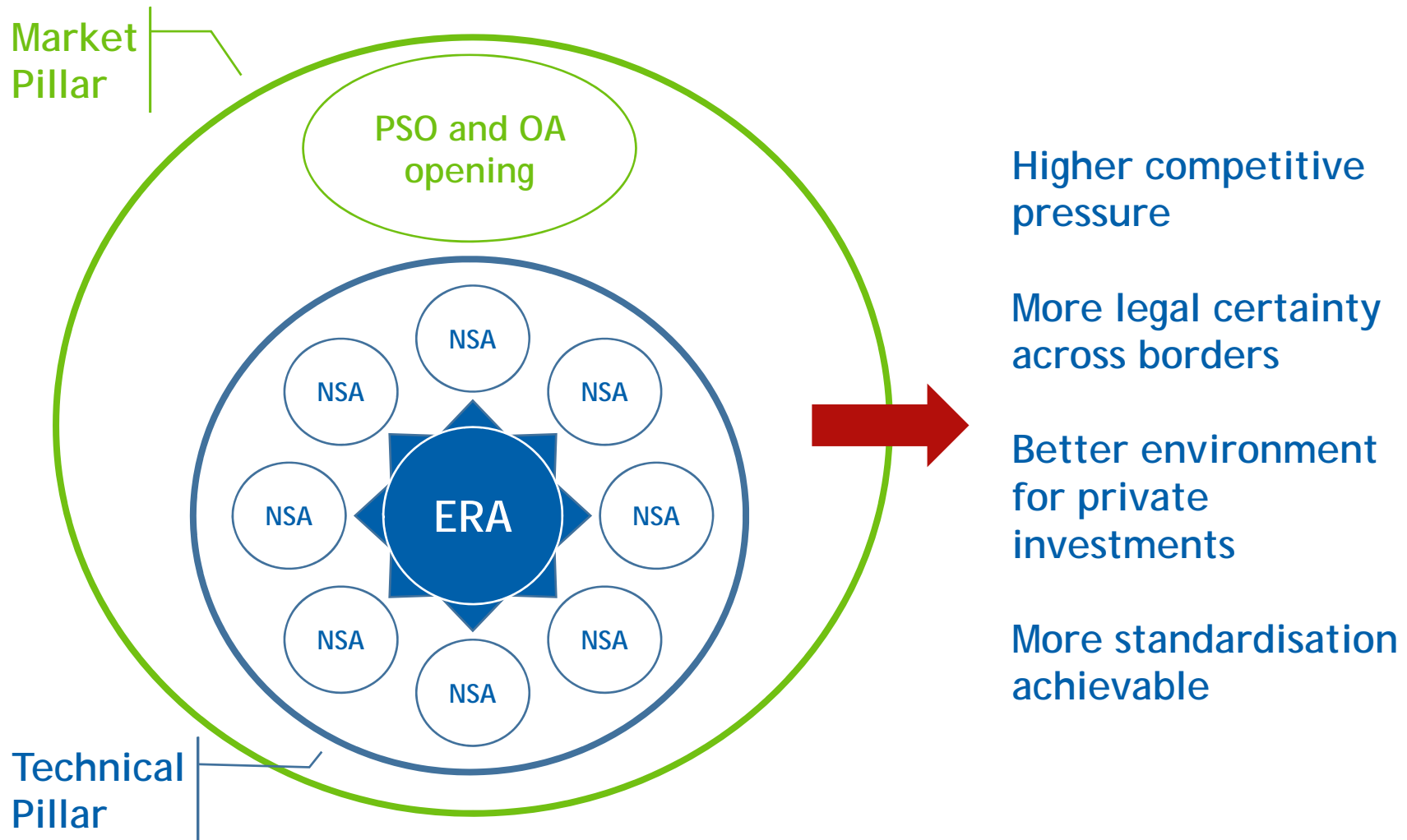
## Market

Rail legislative packages enforcing progressive market opening

## Technical

Interoperability & safety, TSIs Implementation; investment in technology

# 4RP: technical harmonisation and market opening



# Market Pillar



## More independent IMs

- ▶ Less dual memberships in boards; better impartial essential functions, traffic management and maintenance planning; increased financial transparency.

## ENIM is established

- ▶ IMs will deal with best practices, monitoring performance, tackling cross-border bottlenecks.

## Opened domestic passenger mkts

- ▶ Domestic mkts open for commercial services and PSO. PSO direct award still possible. PSO financial equilibrium is protected.

## Promoted ticketing schemes

- ▶ the Commission will report by December 2022 on the status of development of an information and ticketing scheme.

# Market Pillar

## **PSO undercompensation not ruled out**

- ▶ EP and Council agreed on an explicit prohibition of under-compensation only in the form of a recital.

## **Current social standards are kept**

- ▶ Whatever is binding today remains binding – but nothing more than that.

## **Rolling stock: still a barrier to enter the market**

- ▶ Competent authorities shall assess whether measures are necessary to ensure effective and non-discriminatory access to suitable rolling stock.

# A new legal framework for more efficient and competitive railway technology



European Railway Agency as One-Stop-Shop



European vehicle authorisation



Single Safety Certificate



"Area of use" (Interoperability) "Area of operation" (Safety)



ERA as system authority for ERTMS



Clear set of TSIs, NNTRs and ENs



Clear roles & responsibilities of NoBo & DeBo



New appeal board

# New opportunities: The digitalisation of railways



The smartphone finds the best way to the station



Purchase all services online



Work online with a complete WiFi coverage



Order on-board services with your smartphone



Real time information



Intelligent timetables



The only thing we will not develop an app for!

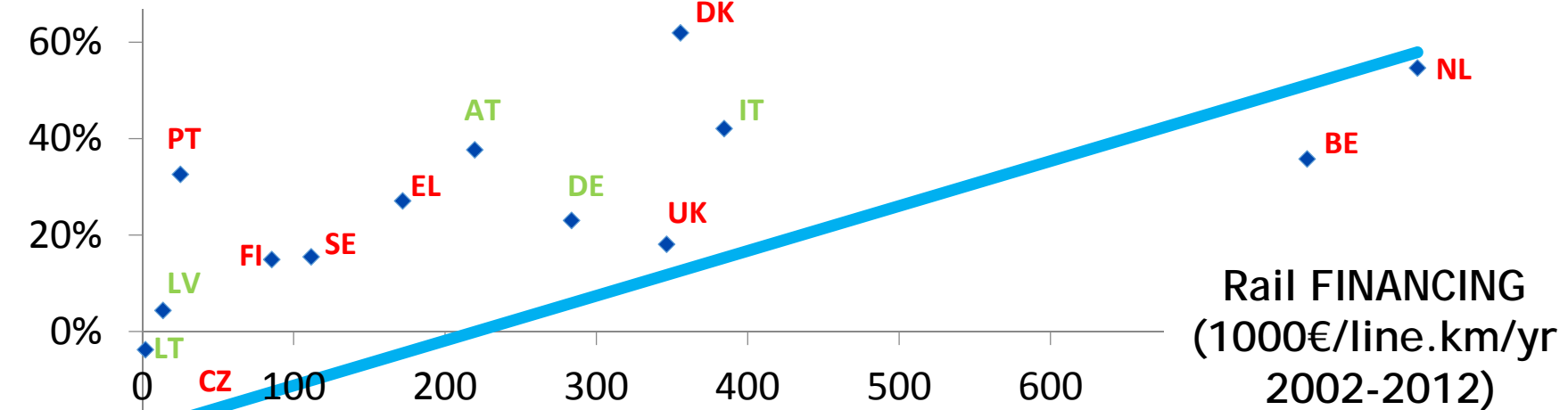


# FINANCING significantly and positively impacts rail freight modal share!



Rail Freight  
MODAL SHARE GROWTH  
(2002 - 2012)

$R^2 = 30\%^*$



$R^2 = 0.3037$

Integrated / Unbundled

Data Source: European Commission's RMMS 2007-2014 (excluding HR & LU)

# Intermodal legislation must be addressed!



Road Package expected end 2016

## Charging Policy

*Road pricing: 99% of the road network and 50% of the motorway network is not tolled, with very high non-internalised external costs*

## External costs

*External costs of road traffic shall be internalised*

## Social aspects

*Comparable standards to be set*

Other issues

## Fiscal and VAT Policy


*Total VAT exemption for int'l flights and aviation fuels*

## Passenger rights' Policy

*Force majeure clause applicable for aviation, not for railways*



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