



ERFA ANNUAL EVENT 2019

How new entrants can stimulate performance and growth towards '30 in 2030'

Annika Kroon

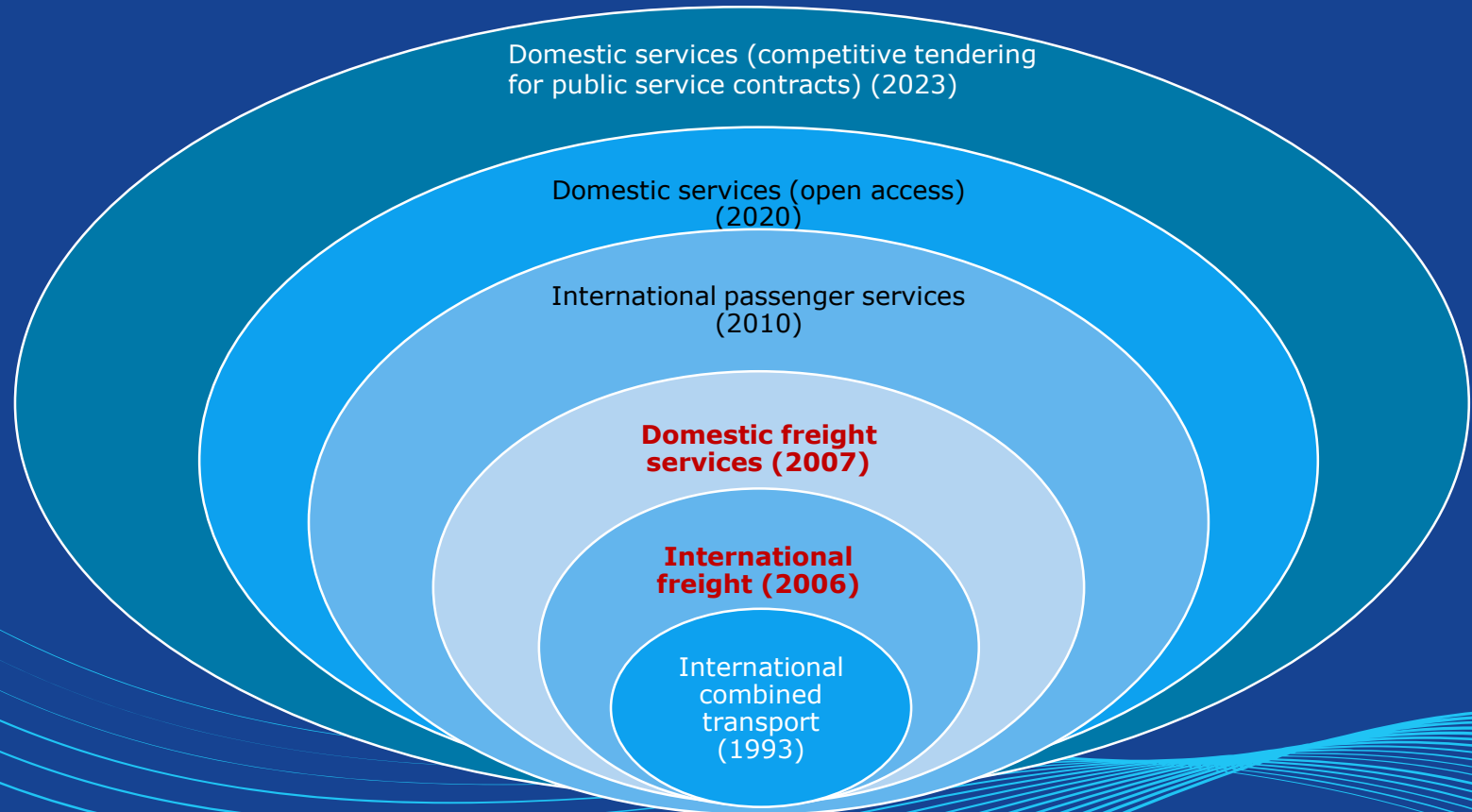
DG MOVE, Unit "Single European Rail Area"

Warsaw, 3rd April

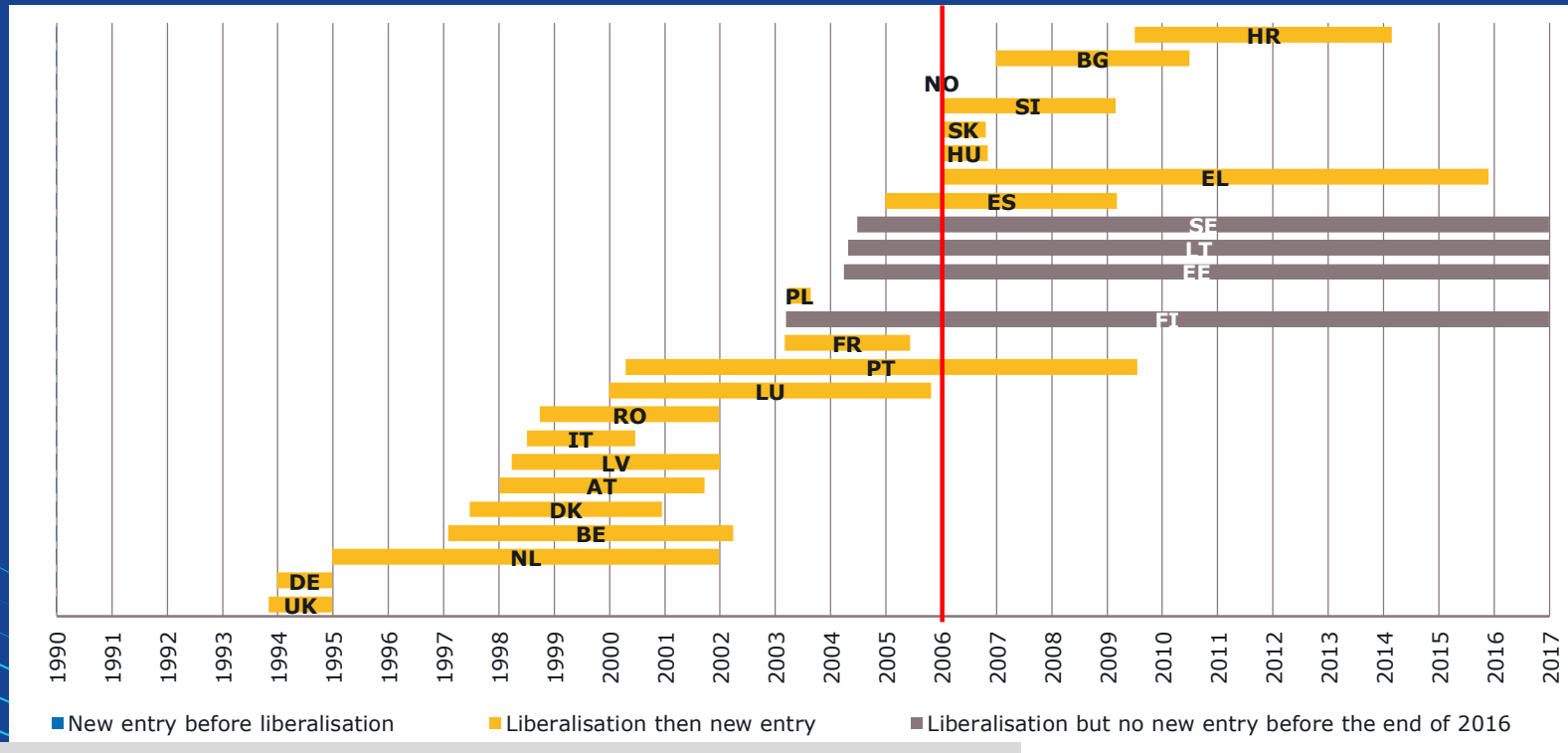


- Rail freight market – state of play
- Pillars of the growth
- EU Policy Outlook

Opening the railway market

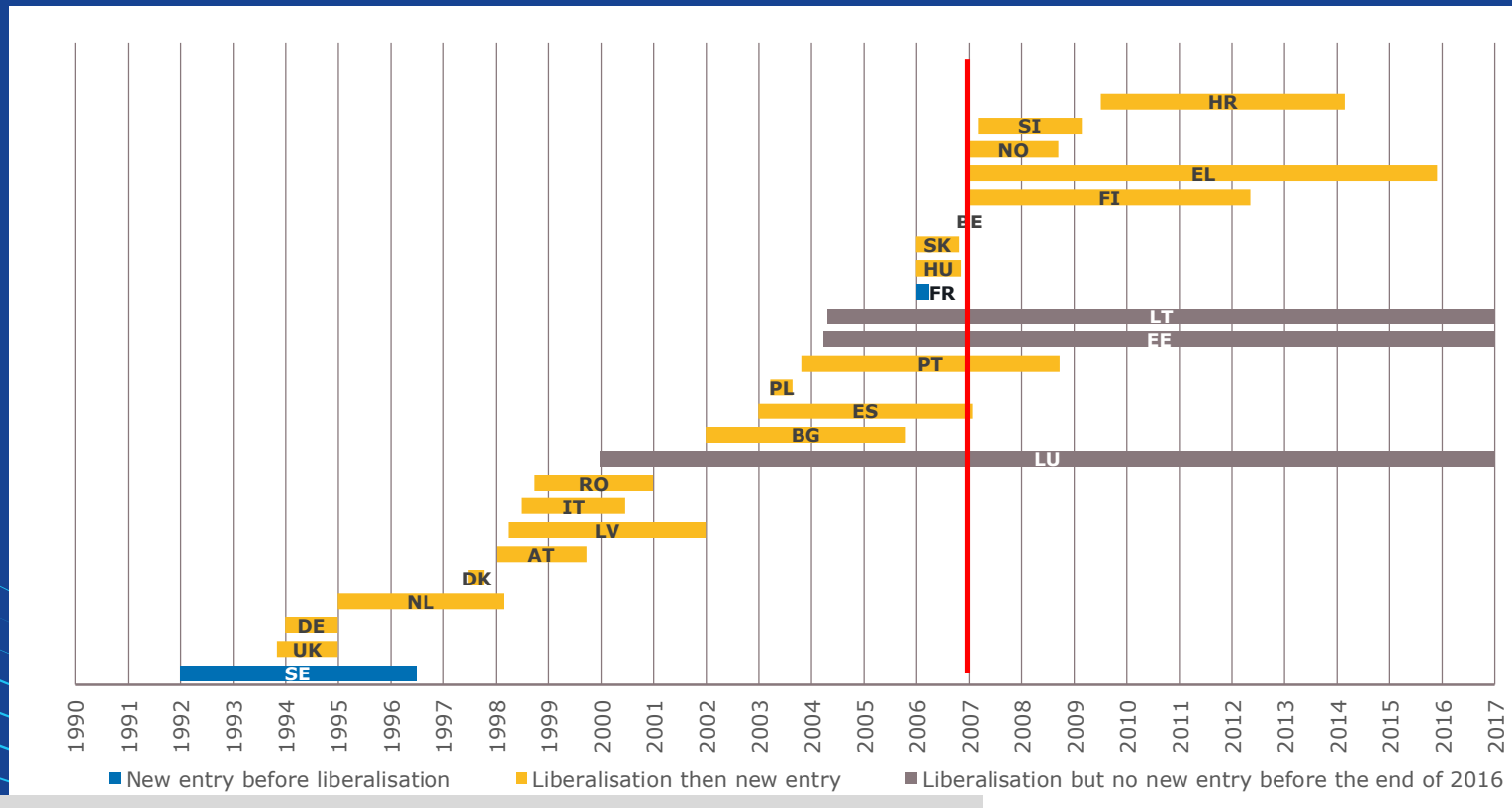


Legal market opening and first licence for international freight



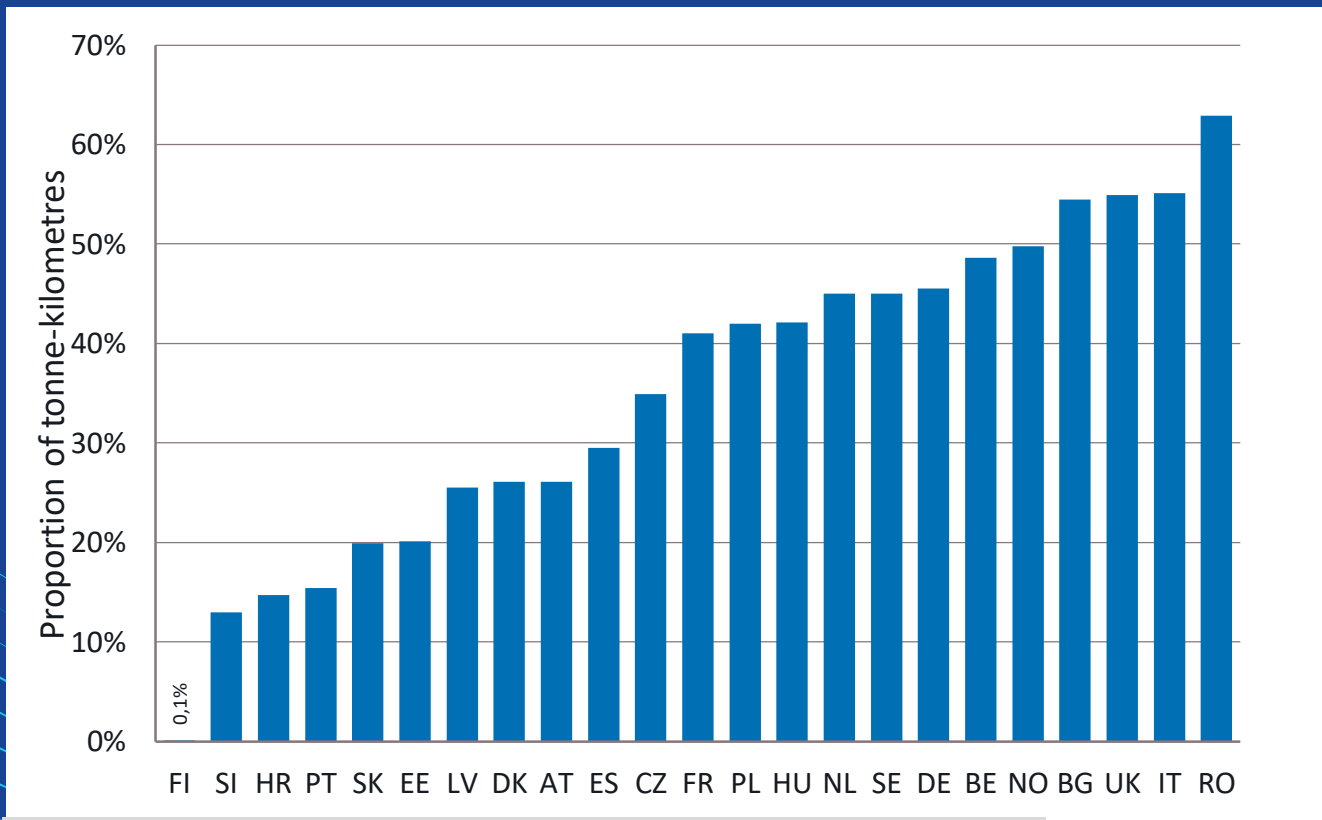
Source: IRG 5th Market Monitoring Report

Legal market opening and first licence for domestic freight

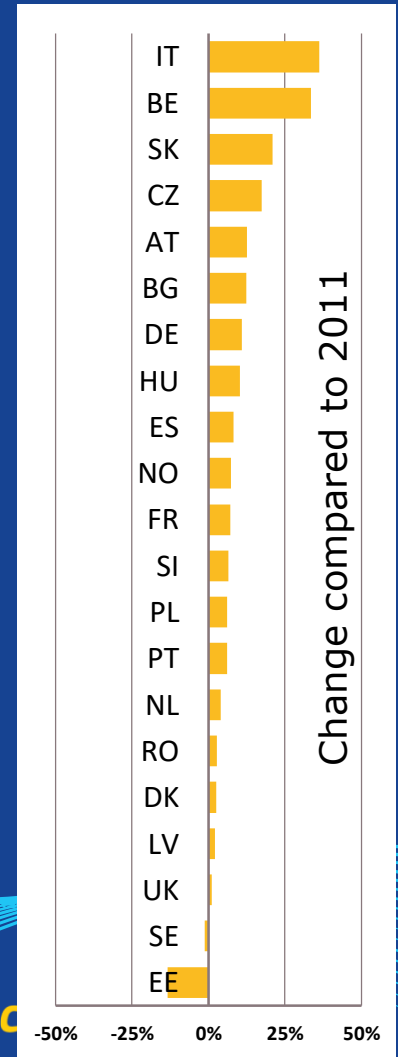


Source: IRG 5th Market Monitoring Report

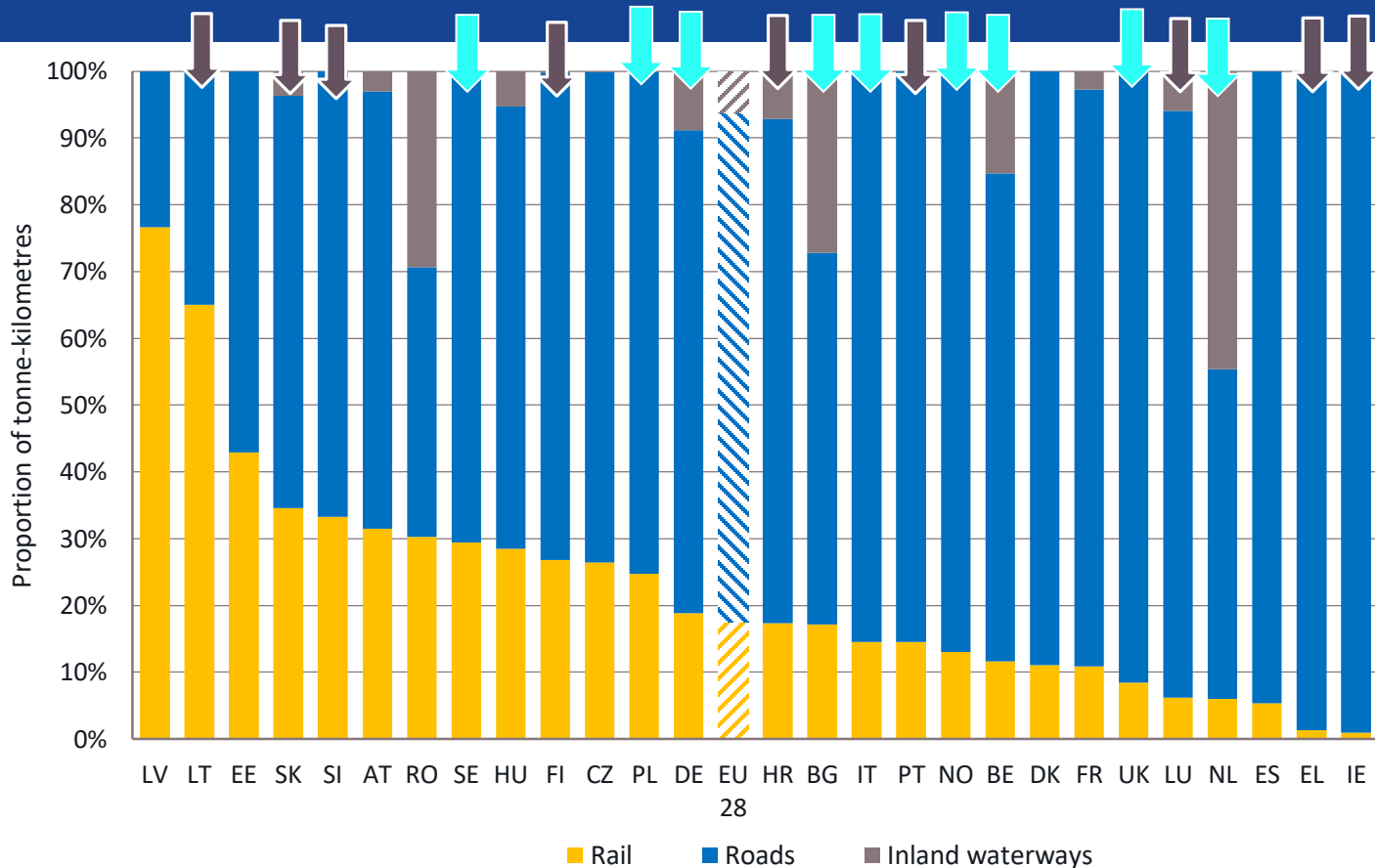
Competitors' market share in 2016 (freight)



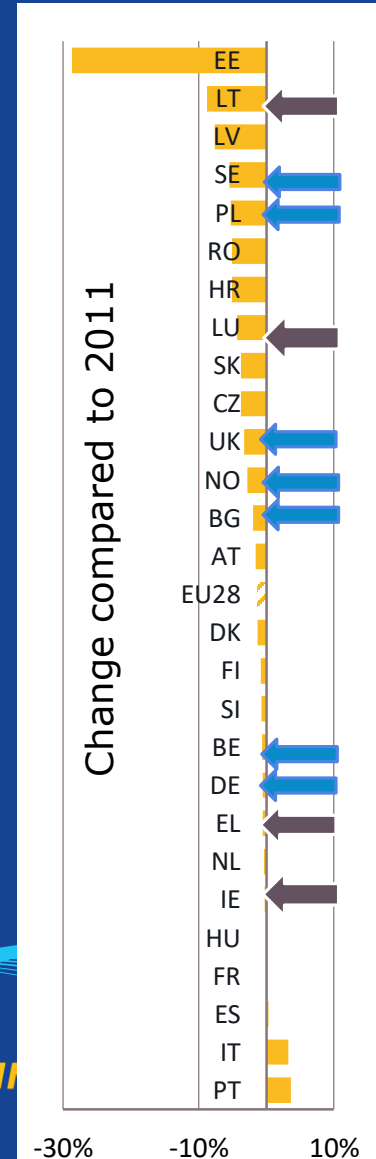
Source: Sixth Report on Monitoring development of the Rail Market, COM(2018) 780 final



Rail freight market share



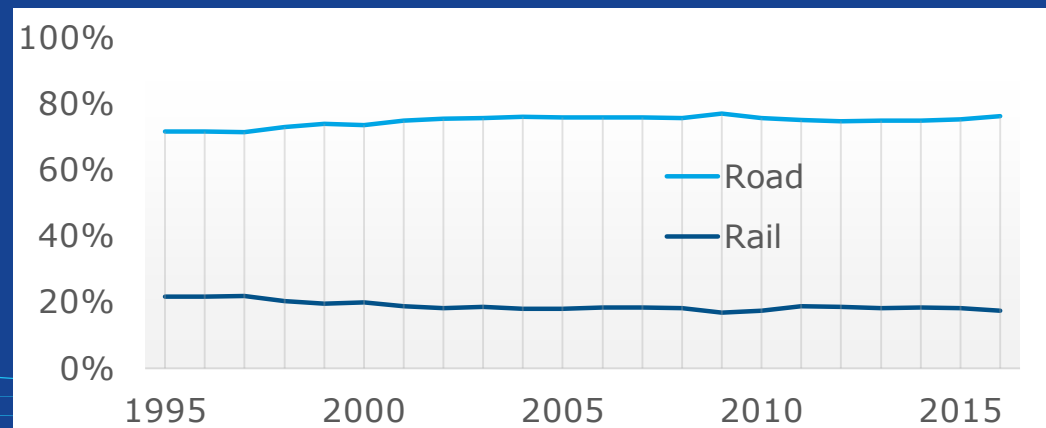
Source: Sixth Report on Monitoring development of the Rail Market, COM(2018) 780 final



Where we stand:

- Legislative framework complete
- The share of new entrants on freight markets is increasing
- RFCs have been set up to support international freight
- 75% of CEF investments provided to the rail sector

**But modal
share stagnating**

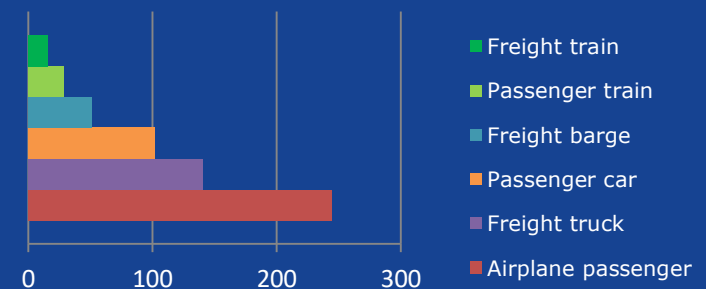


Shared vision on the importance of rail freight

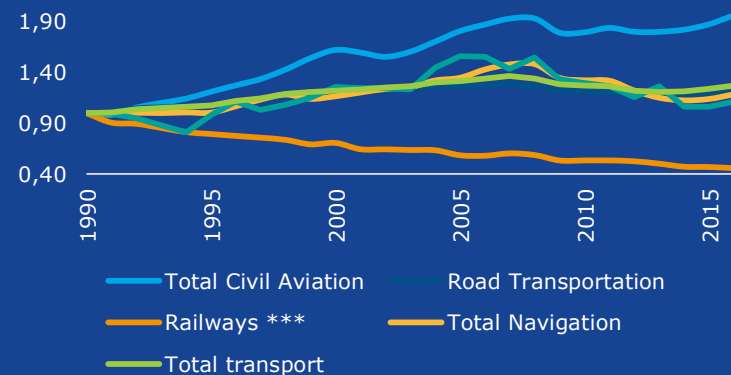
- Rail is the backbone of **connectivity**
- Shifting rail freight helps tackling:
 - Decarbonisation
 - congestion on roads
 - Reduces:
 - the pressure on road infrastructure
 - the risks linked to transporting dangerous goods

Rail is **the safest mode** of land transport.

Emissions by transport mode
gCO₂/pkm (passenger)
gCO₂/tkm (freight)

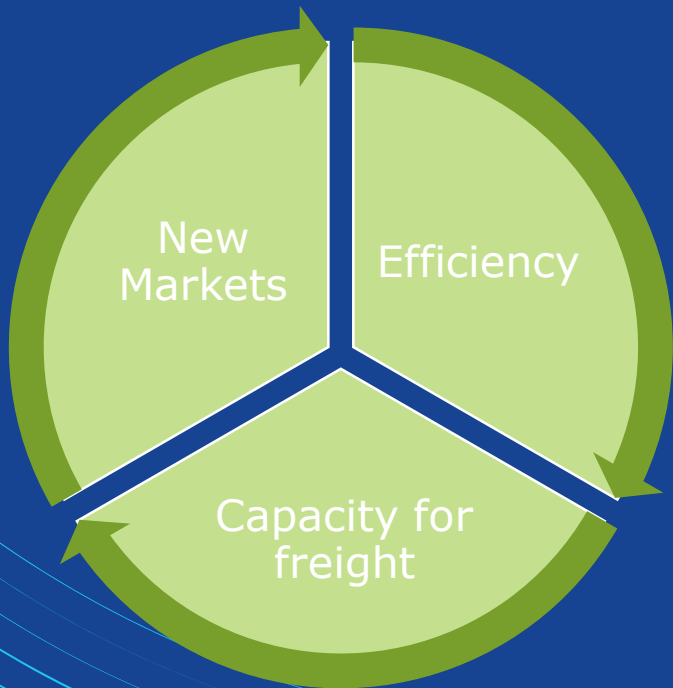


Evolution since 1990



Source: Sixth Report on Monitoring development of the Rail Market, COM(2018) 780 final (data 2016), EEA 2017 (2014 data), Statistical Pocketbook 2018

Pillars for better performance



Sector

Efficiency
Quality
Innovation
Marketing
Multi-
modality

IMs

Efficiency
Quality
Innovation
Good
infrastructure
Good capacity

Public authorities

Framework
conditions
Market
surveillance
Funding



New markets

Intermodal
connections

New
products

Flexible
capacity

Good
data

Sector
dimension

- Good knowledge of the market
- Active marketing
- State of the art terminals
- Flexible high quality capacity
- Containerisation
- Implementing ETA

Policy
dimension

- Support terminal development
- Rail Facility Portal
- Combined Transport Directive
- Timetable redesign
- Data collection and modelling
- Digital Transport and Logistics Forum
- Evaluation of TAF TSI



Efficiency

Inter-
operability

Automatisation
digitalisation

Efficient IM

Reduce
admin. burden

Sector
dimension

- Modern organisations
- Operational innovations
- Dynamic capacity and traffic management
- Optimisation of logistic chains
- Electronic cargo documentation

- The Issues Logbook
- Technical Pillar of 4th Package
- Shift2Rail two
- Performance targets to IMs
- Train-driver language pilots

Policy
dimension



Capacity

Smart
investments

Flexible
planning

Optimal
logistics

Digitali-
sation

Sector
dimension

- Deployment of ERTMS
- International coordination for train paths, charges, TCRs
- Modern capacity planning and traffic management tools
- Sharing operational data
- Optimal cargo flows

- Better targeting of investments
- The range of financial instruments
- Evaluations:
 - RFC Regulation
 - TEN-T Guidelines
- Standard operational rules and EU network management

Policy
dimension



What stands out?



A FULLY SPRAY-PAINTED
NOAH'S TRAIN ARRIVES IN
BRUSSELS

Feb 20, 2019



Summary & Outlook

*TAKING TIME TO
REFLECT*

- 2019 - year of the change and preparation:

new EP and College

- We are looking for feedback:

How we can make progress in entering to **NEW MARKETS** and improving **EFFICIENCY** and available **CAPACITY** for rail freight.

- Evaluation of **RFC Regulation**
- Evaluation of **TEN-T Guidelines**
- Second mandate of **Digital Transport & Logistics Forum**

- Considering setting up a **comprehensive rail freight strategy**



Thank you!

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