European Rail Freight Association

Accelerating towards a market oriented rail system

Irmtraut Tonndorf
ERFA Chair

Bruxelles, 24.3.2015

Welcome to the Hotel Le Plaza…

Welcome to ERFA.

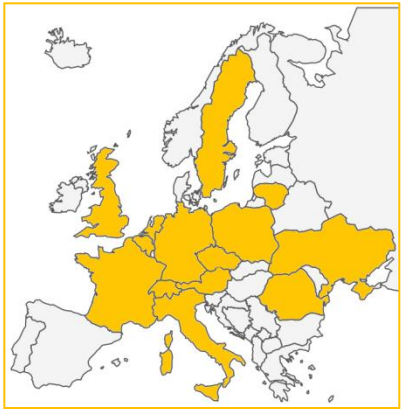
Founded 2002 with the 1st Railway Package

Recognized as a sector association by all EU bodies (Commission, Parliament, Council, ERA)

35 members in 16 countries:
> Rail operators
> Wagon keepers
> Service providers
> Forwarders
> National rail associations

ERFA represents new entrants and those who seek full liberalisation of the rail market.

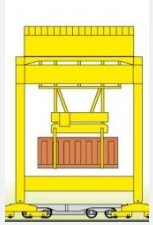
ERFA works towards a competitive and innovative single European railway market by promoting attractive, fair and transparent market conditions for all railway companies.



Doing business in a monopolistic environment: the escalator example

Newcomers despite discrimination: we try harder.

Prerequisites



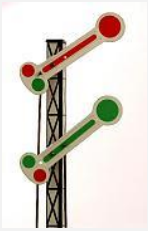
Terminal of incumbent: „Full!“

Construction of a new terminal: „IM won‘t build access lines!“

Financing: „Prohibitive conditions!“

Homologation process: „Slow!“

High tech standard: „Expensive!“



Train path: „Bad quality with long waiting times and high risk of delay!“

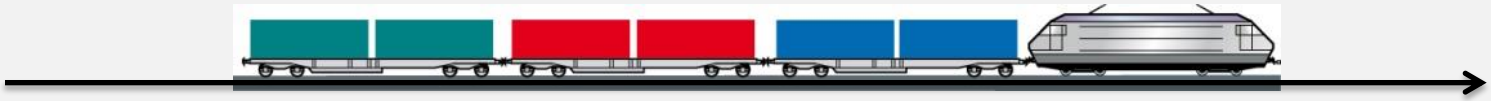
Access to infrastructure

Network development, capacity planning and technological strategy according to the incumbent‘s requirements

Price system is formed to privilege the incumbent

Hindered access to rail related services

A



B

Punctuality is achieved for incumbent at the expense of the newcomer

Operational information is delayed

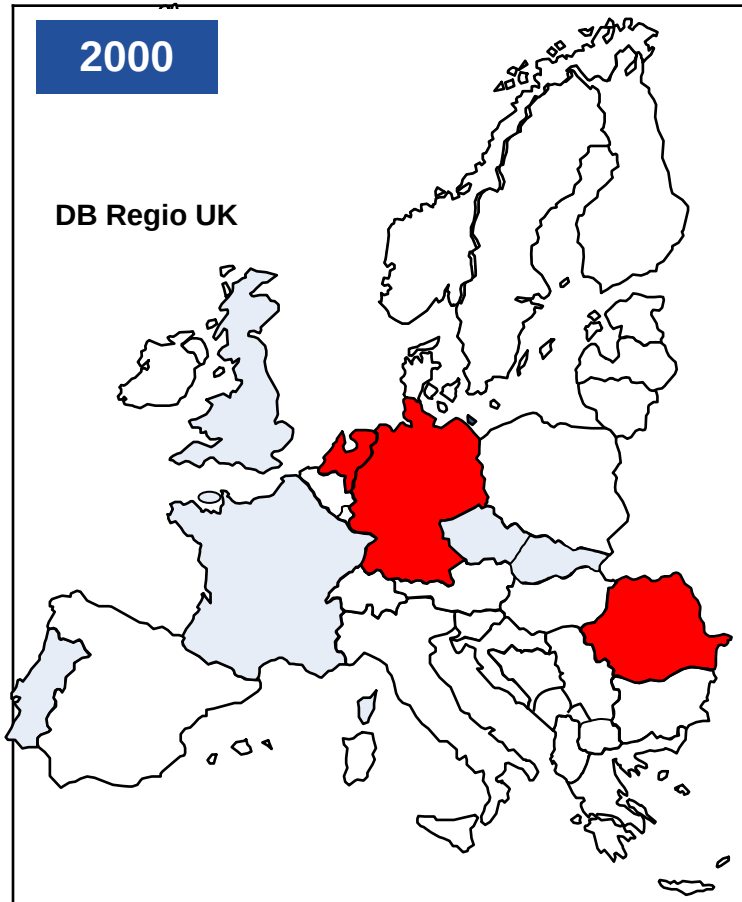
Interruption! Priority is given to the incumbent

Technical problem! No help granted

Operational conditions

DB majority owned companies

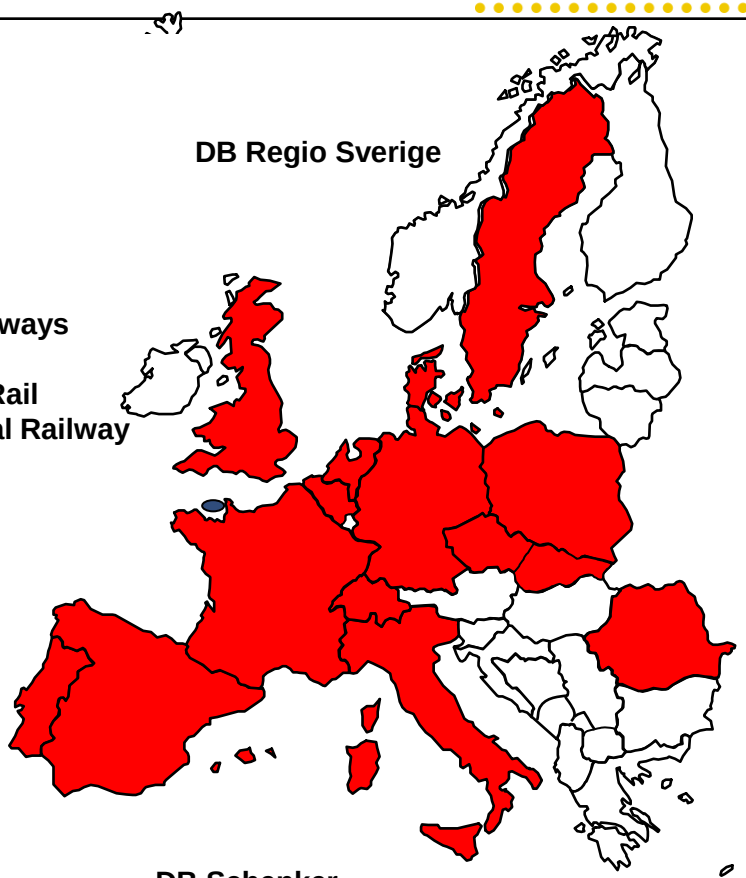
2000



No information regarding starting point

DB Schenker
- Railion Nederland (NL)
- Rail Portugal (PT)
- Rail France (FR)
- Rail Chech Republic (CZ)
- Rail Slovakia (SK)
- Rail Romania (RO)

Today



DB Regio UK
Chilterm Railways
EWS
Euro Cargo Rail
Grand Central Railway

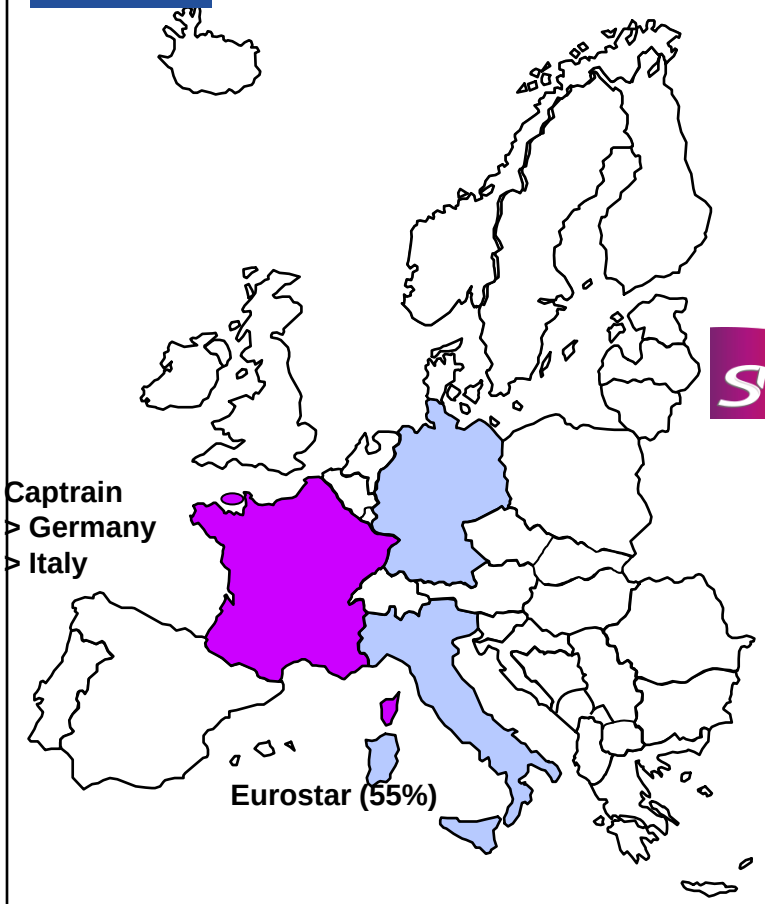
Transfesa
(55,1%)

Arriva
- Czech Republic
- Denmark
- Netherlands
- Poland
- Sweden
- United Kingdom

DB Schenker
- Strade Ferrate del Mediterraneo (IT)
- Ferrovie Nord Cargo (IT)
- Railion Nederland (NL)
- PCC (PL)
- Brunner Rail Services GmbH (CH)
- Logistic Services Danubius (RO)
- DSB Gods (DK) (51%)
- Rail Portugal (PT)
- Rail France (FR)
- Rail Chech Republic (CZ)
- Rail Slovakia (SK)

SNCF majority owned companies

2000



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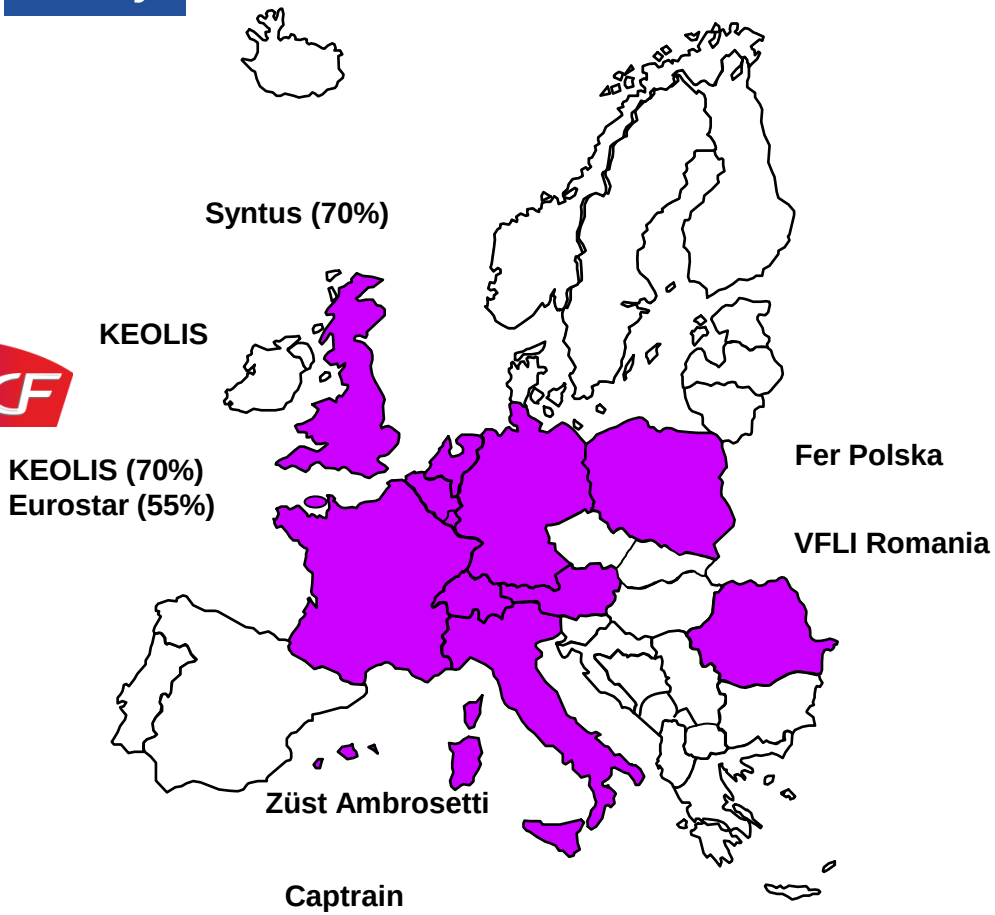


Captrain
> Germany
> Netherlands
> Belgium
> Luxembourg
> Switzerland
> Poland
> Chech Republic
> Italy

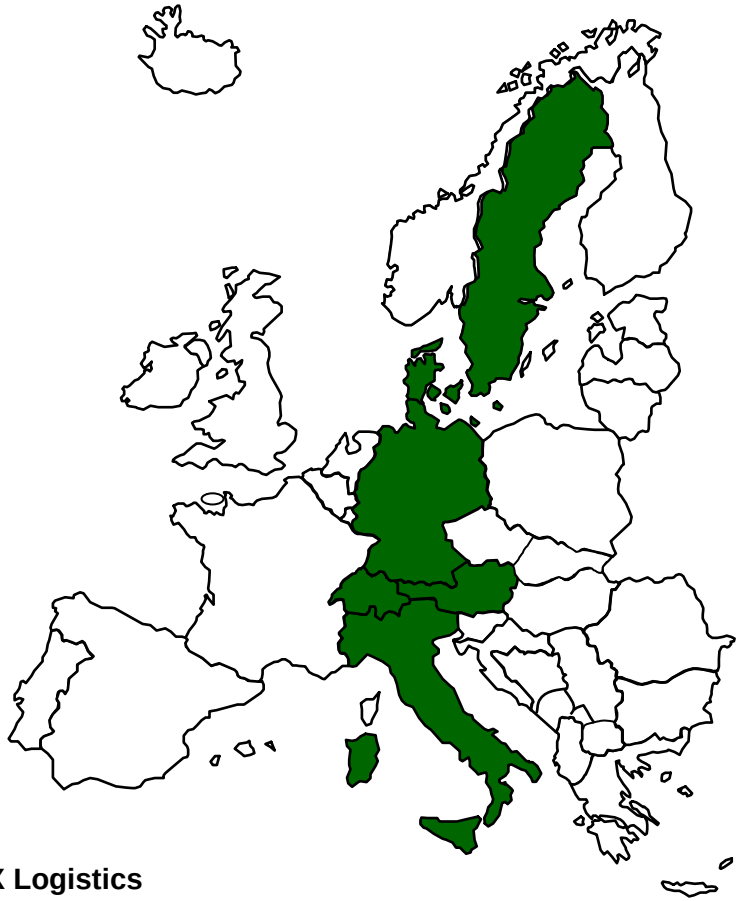
Veolia Cargo
> Germany
> Netherlands
> Italy

Trenitalia majority owned companies

2000

No information regarding starting point

Today



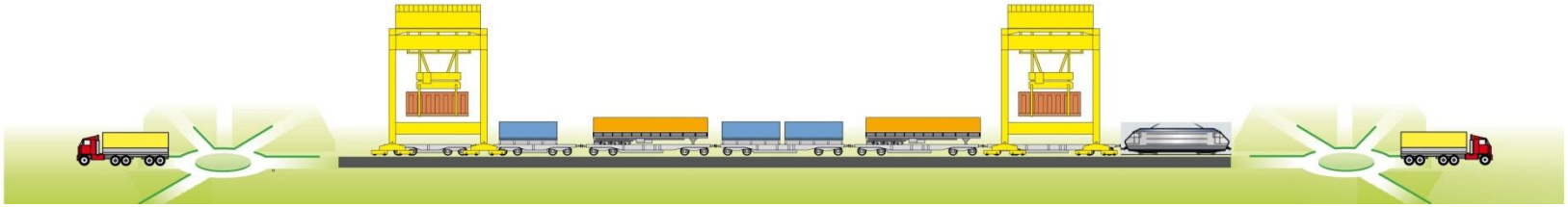
TX Logistics

> Germany	(TX Logistik AG)	
> Denmark	(TX Logistik A/S)	
> Italy	(TX Logistik AG Filiale Italia)	Also operating in
> CH	(TX Logistik GmbH)	> Netherlands
> Austria	(TX Logistik Austria GmbH)	> France
> Sweden	(TX Logistik AB)	> Norway

How to contribute to the EU modal shift target…

…with trains standing still instead of running?

Example: 1 hour of stop, leading to a subsequent cumulated delay of 4 hours, of an intermodal train Cologne-Milan (800 km) with 27 railcars, 40 loading units, 750 tonnes of goods

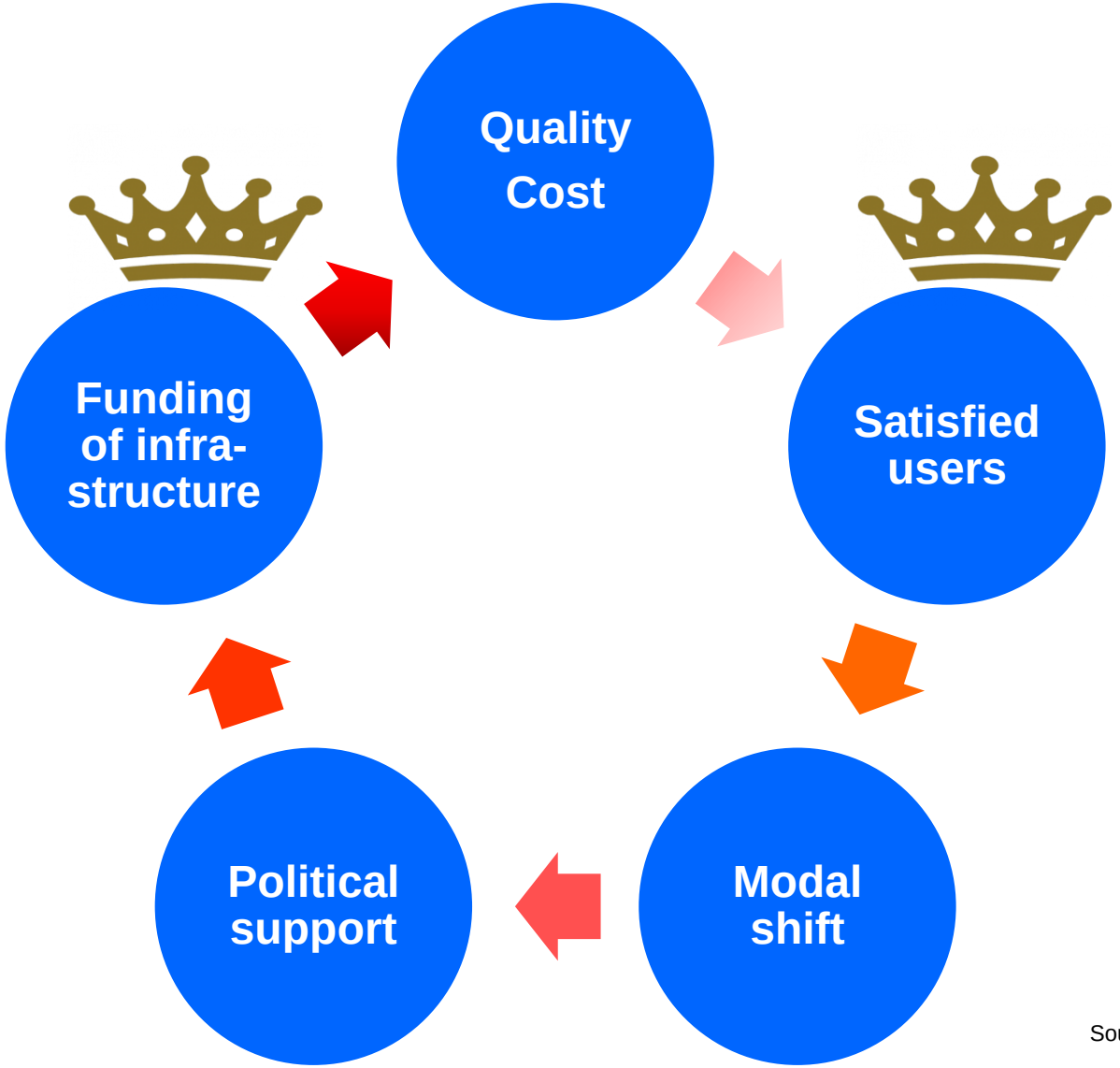


Sector	Detail	Cost
Loading companies	EUR 1.4 x (600,000 tonne-km / 800) x 4 x 2,15 * + Domino effect: loss of production, loss of sales etc.	**EUR 9.000**
Transport operators	40 equipments + driver at 600 EUR a day, ½ day stop	**EUR 12.000**
Intermodal operator	27 railcars at 30 EUR a day, ½ day stop Supplementary terminal operations Irregularity management	**EUR 400** **EUR 800** **EUR 500**
Railway untertaking	Locos and drivers, ½ day stop Additional train paths Irregularity management	**EUR 2.000** **EUR 1.000** **EUR 500**
Total		**EUR 26.200**

*ERA/GUI/09-2013, page 26-28

Infrastructure managers: business partners of railway undertakings?

The customer is king.



Source:

Pushing for a market oriented infrastructure management

Harmonised rules and principles

- ➔ Transparency and simplicity
- ➔ Common transborder and corridor rules

Investments and cost control

- ➔ Accomplishment of urgent infrastructure works (ERTMS / ETCS)
- ➔ Distinction between investments for maintenance and construction
- ➔ KPIs on infrastructure cost and maintenance efficiency

Operational processes

- ➔ Single European train documentation
- ➔ Electronic way bill (CIM)
- ➔ Uniformed and simple data exchange

Quality and safety

- ➔ Monitoring of punctuality, breakdowns, accidents
- ➔ Quality agreements and customers' rights

Thank you.

thank you
danke
謝謝
ngiyabonga
teşekkür ederim
gracias
tapadh leat
спасибо
Баярлалаа
рахмат
bedankt
dziękuję
obrigado
merci
go raibh maith agat
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terima kasih
감사합니다
ありがとう
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dank je
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sobodi
dēkuji
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