Der europäische Fokus

Schwerpunkte der UIP-Arbeit der kommenden Jahre

Johann FEINDERT / Präsident UIP

WHO WE REPRESENT

UIP is the umbrella organisation of **Private Wagon Keepers** and **Entities in Charge of Maintenance** (ECMs) in Europe.

Our members:

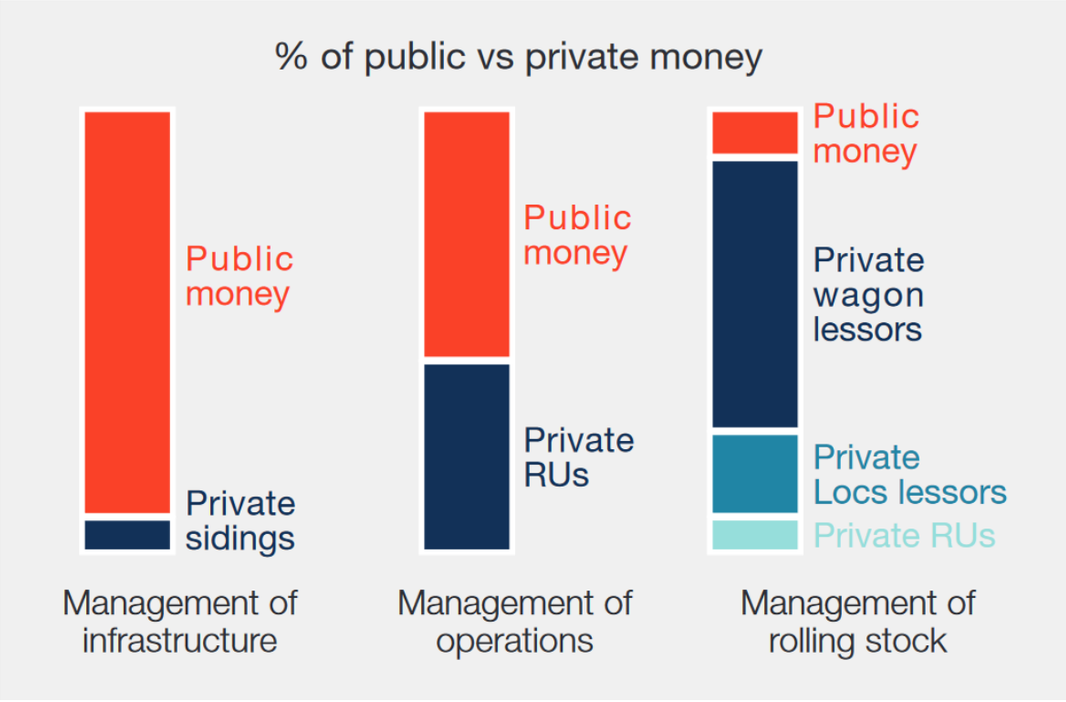
Austria, Belgium, Czech Republic, France, Germany, UK, Hungary

Italy, Netherlands, Poland, Slovak Republic, Spain, Sweden, Switzerland

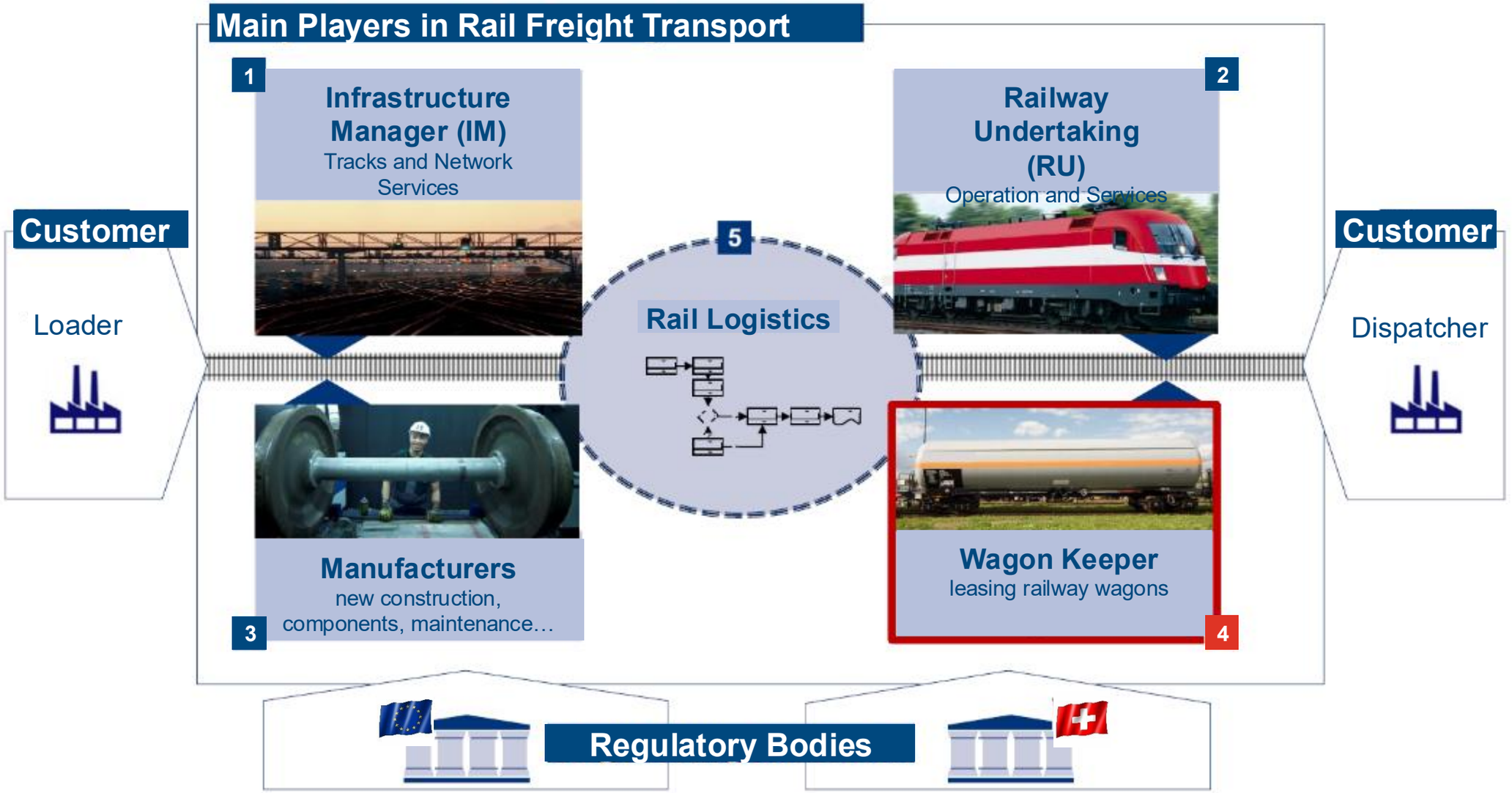
WHO WE ARE

European Wagon Keepers manage **half of the European rail freight wagon fleet** (~250 000 wagons) and **invest EUR 2 billion annually** in new rolling stock.

They are responsible for **75 % of all new freight wagon registrations**.



OVERVIEW


Main Players in Rail Freight Transport
1
Infrastructure Manager (IM)
Tracks and Network Services
2
Railway Undertaking (RU)
Operation and Services
Customer
Loader
5
Rail Logistics
Customer
Dispatcher
Manufacturers
new construction, components, maintenance…
3
Wagon Keeper
leasing railway wagons
4
Regulatory Bodies

FINANCING RAILWAYS

THE ROLE OF GOVERNMENTS

Private capital

Railways played a decisive role within the transportation system.

Competition from road transport begins

Economic expansion

Divergent national policies (electrification system, ….), increase of public contributions

Nationalisation

Postwar period and great depression caused decline of the so-called « private » railway companies

New financing streams

Postwar period, heavy investments in road, creation of Eurofima, growing number of private lessors

Oil shocks

Accumulated deficits (often +2% of GDP), concerns about rail freight market decline

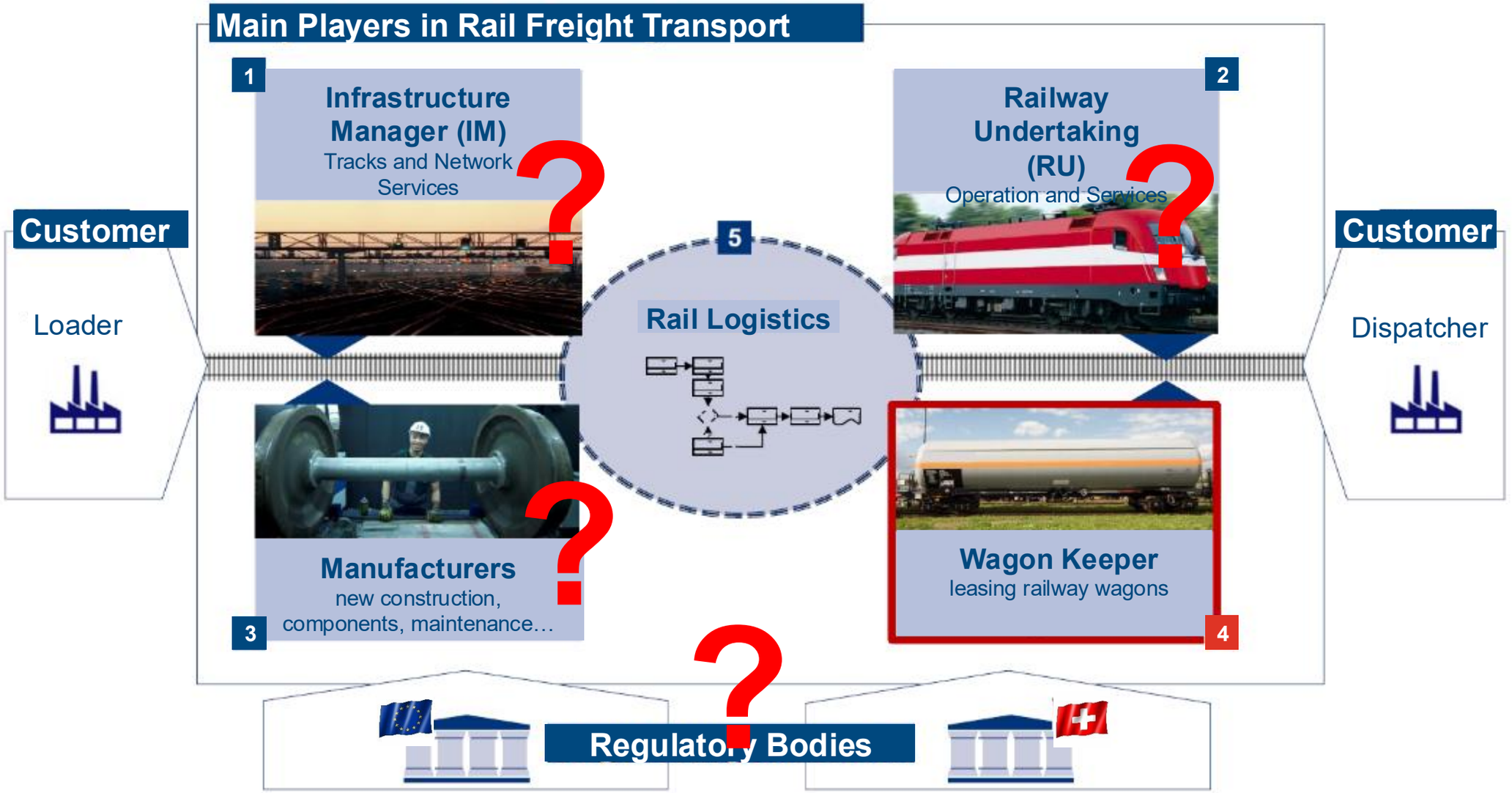
EVOLUTION OF LEGAL FRAMEWORK IN RAILWAY

25 YEARS OF EU POLICY

TIME DEVELOPMENT

1990	91/440 liberalisation directive + 92/106 Combined Transport directive
1995	95/18 license RU + 95/19 IM charges + 96/48 Interop HS 1996 WHITE PAPER - A STRATEGY FOR REVITALISING THE COMMUNITY'S RAILWAYS
2000	1st railway package (2001) + 2001/16 Interop CONV 2001 WHITE PAPER – EUROPEAN TRANSPORT POLICY FOR 2010: TIME TO DECIDE 2nd railway package (2004) + 2004/881 ERA + 2004/49 Safety
2005	3rd railway package (2007) + 2008/57 Interop directive + 2008/110 Safety directive addendum
2010	2011 WHITE PAPER – ROADMAP TO A SINGLE EUROPEAN TRANSPORT AREA Recast of 1st railway package (2012/34) + Developing and financing common infrastructure policy
2015	4th railway package (2016)

OVERVIEW – QUESTIONS…



MAKING A FULLY INTEROPERABLE RAILWAY SYSTEM IN THE EU

FIRST PART OF THE DIGITAL CHALLENGE

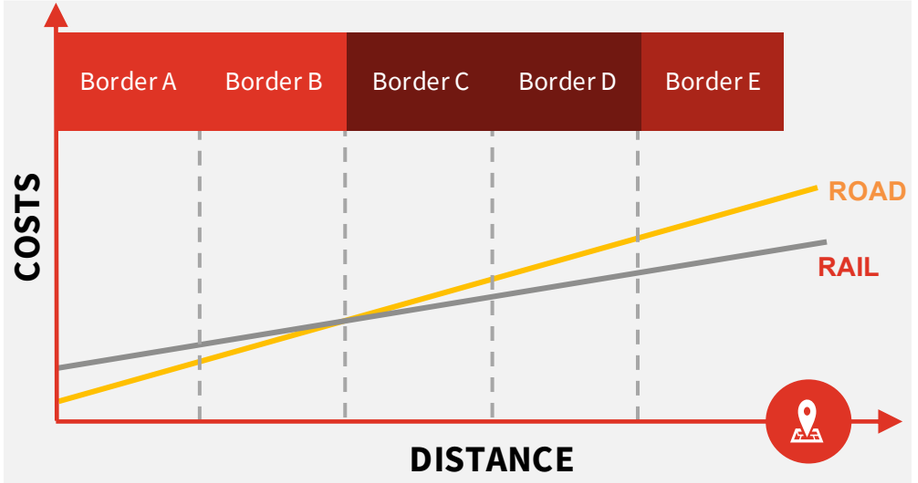
RAIL FREIGHT CHALLENGES

COSTS	QUALITY	SERVICE	TECH
Improve productivity, efficency, utilisation of resources	Improve reliability, punctuality, customer satisfaction	Develop new service added-value Re-enter markets	Migrate to european, digitalised & automated solutions

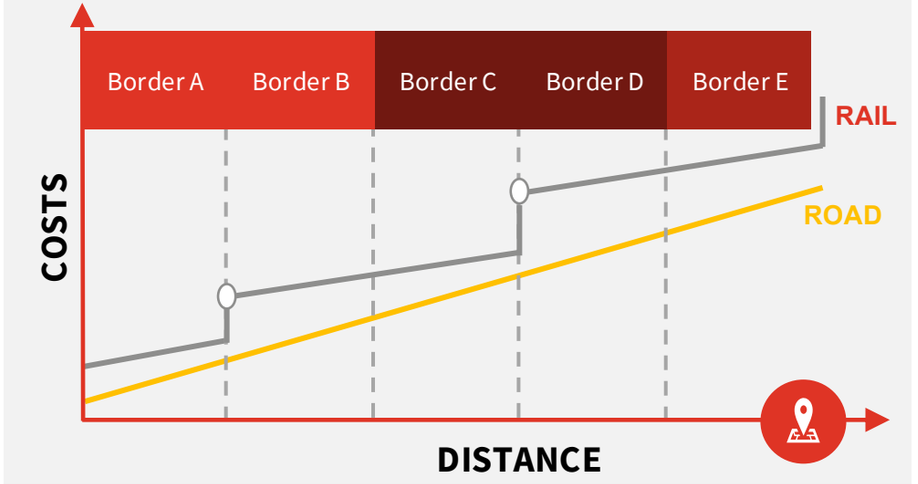
LACK OF INTEROPERABILITY

Addressing the challenges through

- EU regulatory framework
- EU financial support
- Collaboration between Stakeholders



Where theory and reality don't match…



GENERAL POLICY PRIORITIES

MOST RELEVANT FACTORS INFLUENCING THE ATTRACTIVENESS OF RAIL FREIGHT

Infrastructure

- Insufficient and rather old
- Many bottlenecks
- Missing standardisation of last mile
- Insufficient transhipment capacity
- Built to address the needs of passenger traffic (160 – 200 km/h)

➡ **New TEN-T Regulation and CEF Funding**

Infrastructure capacity is still lacking

Capacity & traffic management

- Rigid timetable planning and not digital
- National thinking of IMs
- No pan-European operator
- Prioritisation of passenger traffic

➡ **capacity and allocation addressed by the cross-border rail capacity proposal**

Traffic management rules remain national

Train operations

- Inefficient due to lack of automation & digitalisation
- Insufficient customer-orientation
- Nationally fragmented operational rules (e.g. language requirement for train drivers, shunting)

➡ **Language requirements will be addressed in revision of train drivers Directive. ERA cleans up national rules.**

Operations remain manual and non-harmonised

Wagons (also applies to Locomotives)

- Availability of adequate and modern wagons
- Long life cycle (30-40 yrs)
- Upgrading wagons with innovative components
- Constant private investments
- Gradual shift from RU-owned to Private Keeper-owned wagons

➡ **Revision of State aid guidelines should facilitate national subsidies for innovation deployment and upgrades**

Subsidising new builds distorts the market

➡ **DAC would make train operations more efficient, create more infrastructure capacity and increase the availability of rolling stock**

OUR VISION

For rail to take its place as the backbone of Europe's freight mobility, a **digital, automated, connected and customer-centric system** needs to be established, with:

- Enhanced **multimodal integration** of supply chains, and
- Accelerated **digital transformation** of rail freight

Multimodal integration:

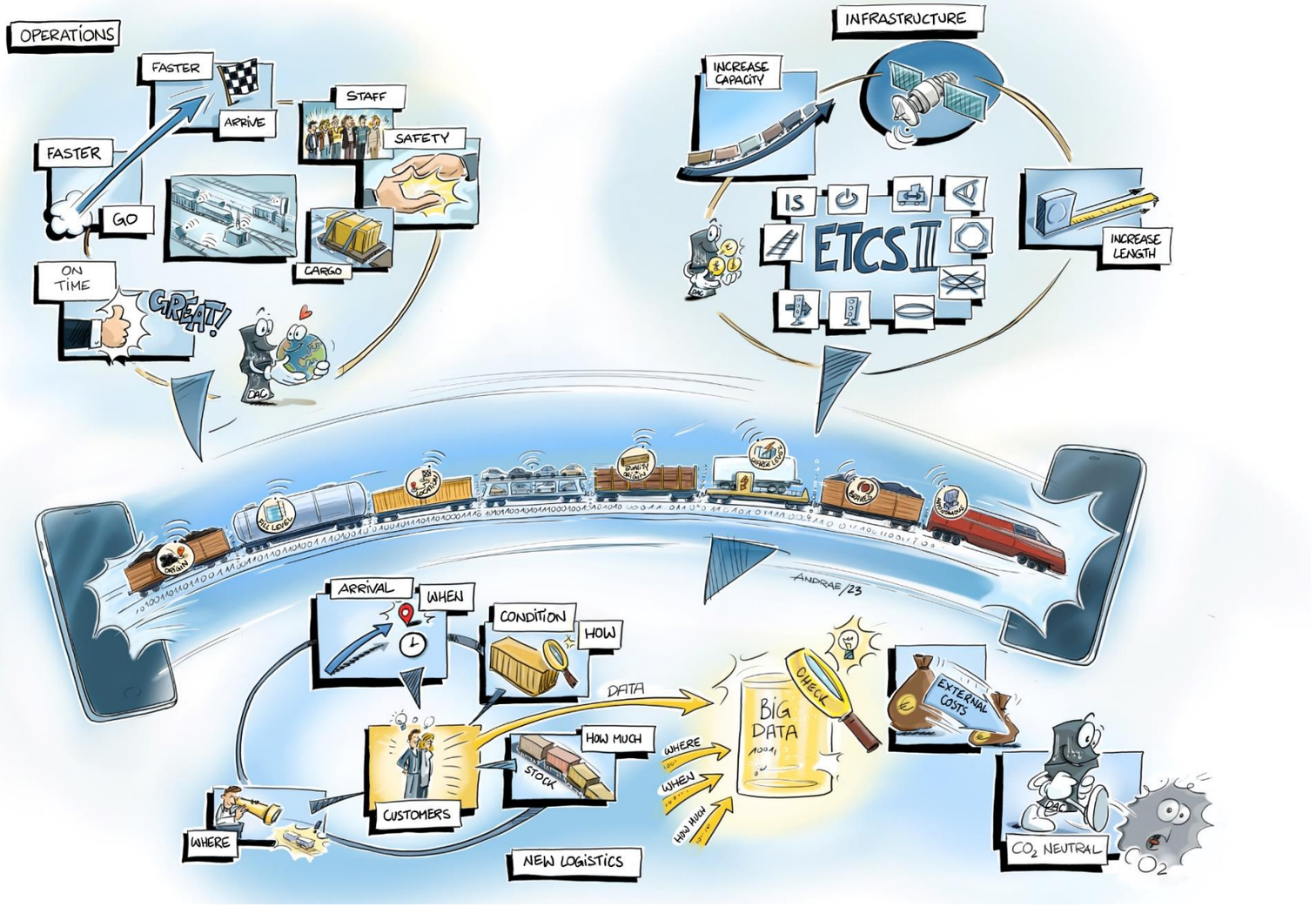
- ✓ Connection to ports and urban nodes
- ✓ Flexible and customized modular systems
- ✓ Integration in land planning to ensure capacity

Digital transformation:

- ✓ Digital and smart infrastructure
- ✓ Digital processes to improve customer experience
- ✓ Fully digital freight train operations

THE DIGITAL AUTOMATIC COUPLER

THE BENEFITS FOR THE SYSTEM AND SOCIETY



Operations

- “faster”
- safer
- longer / heavier

Infrastructure

- from ATO to ETCS
- more capacity
- less new construction

Assets

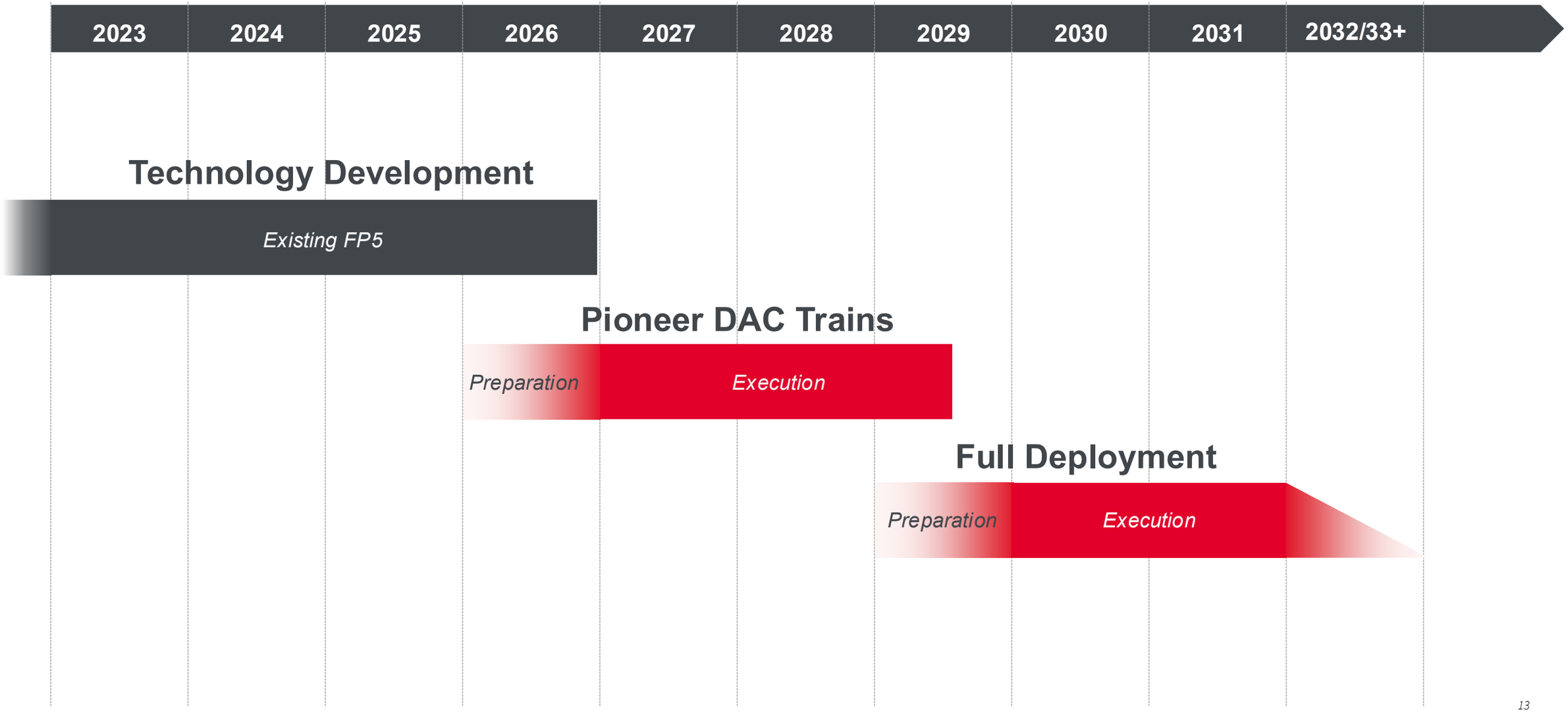
- condition-based maintenance
- attractive
- increased availability

Customers

- reliable, fast transport, real-time tracking
- efficient cargo traffic ready for modal shift
- fully integrated into supply chains

THE DIGITAL AUTOMATIC COUPLER

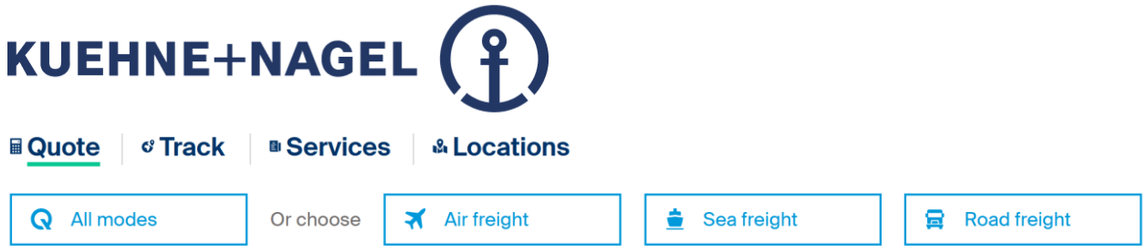
TIMEPLAN - 3 PHASES OF DAC PROJECT



LOGISTIC AS KEY FACTOR FOR ECONOMIC GROWTH

QUESTIONING THE APPROACH AND THE ROLE OF RAIL IN LOGISTICS

Geopolitical risks have a significant impact on the global economic outlook, influencing economic growth, inflation, financial markets, and supply chains.



Logistics contributes to economic growth, efficiency, and competitiveness

- Efficient logistic reduces lead times, lowers operational costs, enhancing overall supply chain efficiency and resilience
- Efficient logistic can lead to faster delivery times, improved customer satisfaction, and cost savings, making businesses more attractive to consumers and investors. It provides competitive advantages.
- Efficient logistic enables small and medium-sized enterprises to reach wider markets beyond their local regions. It fosters access to new customers and opportunities, driving business growth and expansion.
- Efficient logistics stimulates economic growth by facilitating trade and consumption. It enables the movement of goods across regions and countries, promoting economic development and prosperity

THANK YOU FOR YOUR ATTENTION

Austria | Belgium | Czech Republic | France | Germany | UK | Hungary

Italy | Netherlands | Poland | Slovak Republic | Spain | Sweden | Switzerland

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