

EIM's Priorities for 2024-2029

Political priorities of EIM
to the new European Commission
and the new European Parliament

September 2024

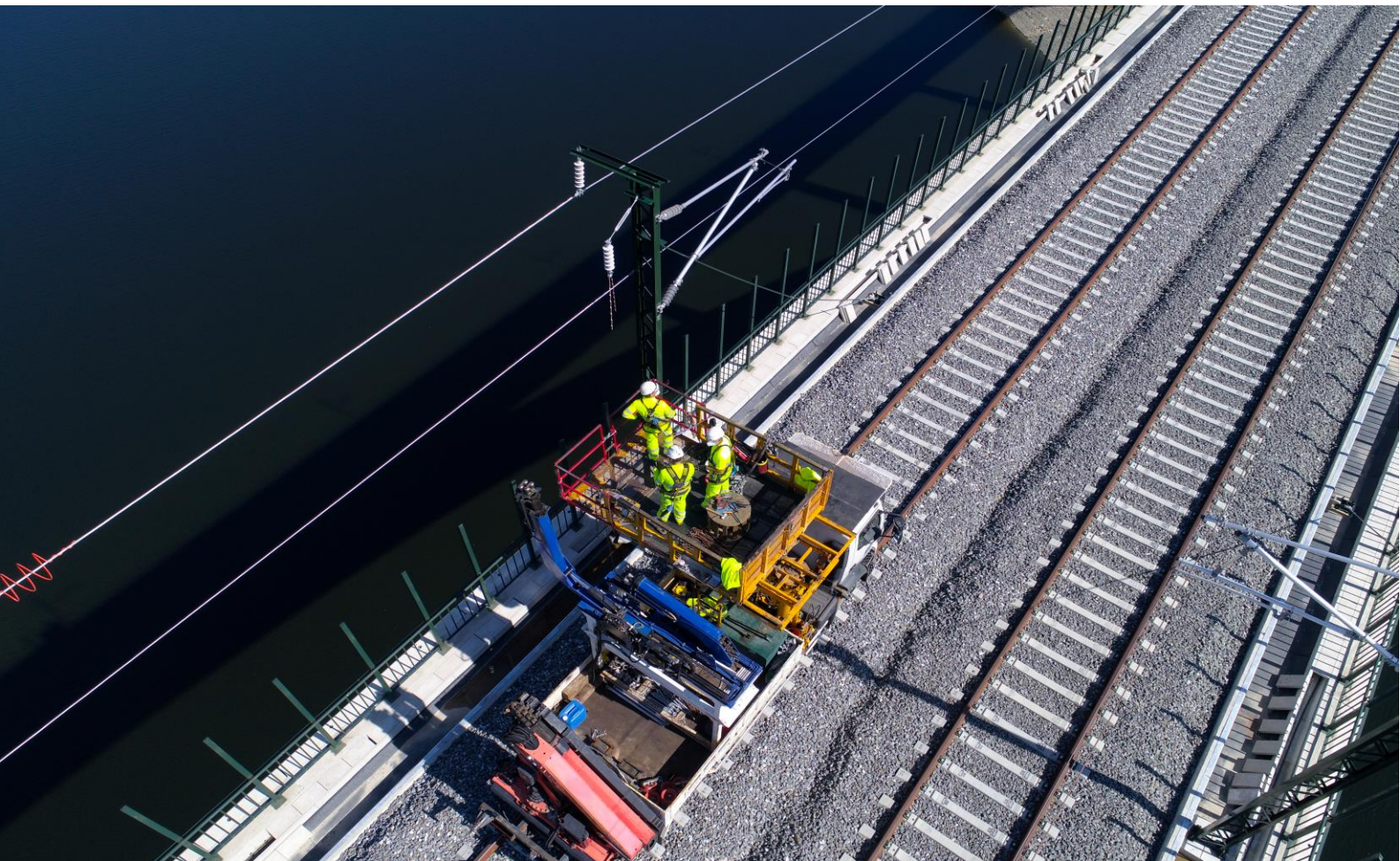


Table of contents

Foreword	- 2 -
Our Association	- 3 -
Rail Infrastructure Managers	- 4 -
Our Political Priorities	- 5 -
▪ Rail Infrastructure	- 6 -
▪ Rail Infrastructure Capacity Management	- 7 -
▪ Funding and Finance	- 8 -
▪ Track Access Charges	- 9 -
▪ Security and Cybersecurity	- 10 -
▪ Digitalisation and Innovation	- 11 -
▪ Procurement	- 12 -
▪ Rail Legislation	- 13 -
▪ Human Factor	- 14 -
Editorial information	- 15 -



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Foreword

For **two decades**, Europe has been working on a more connected Europe.

The **single European railway area** (SERA) is unique. It involves a multitude of countries, actors, policies, technologies and other aspects. And yet, the project is even more important today so that Europe has a future. A truly interconnected Europe helps overcome many geopolitical, environmental, economic, social and innovation challenges. Rail is the ideal solution to achieve these objectives and a major lever in the effort to mitigate the effects of climate change and adapt our economies.

Therefore, **investments in rail infrastructure** are an investment in the future of Europe. Rail infrastructure managers are literally the architects of the SERA. They build, shape and innovate rail infrastructure and its assets. In two decades, they have been rolling out European networks and corridors, opened up their networks, harmonised their rules, electrified more than half of all railway lines, launched the deployment of ERTMS on the TEN-T core network, invested in alternative energy sources and constantly innovate their business.

Rail infrastructure managers are also a **critical geostrategic actor** when it comes to foreign investments, public procurement, security, defence and essential supplies. Rail is the essential backbone of Military Mobility. During the past and current crises, rail infrastructure managers have proven to be a reliable and resilient stakeholder.

The **next EU mandate from 2024-2029** will be decisive for the future of Europe and the SERA alike. Rail infrastructure managers are determined to contribute to a fully connected Europe in which people and goods are transported in a fast, reliable, safe and environmental-friendly manner.

EIM, the association of European Rail Infrastructure Managers, and its members look forward to working together with the **European Union's Institutions** – the Commission, the Parliament and the Council –, with the European Union Agency for Railways and all other stakeholders, shaping the most effective solutions and answers to all dares rail infrastructure managers will face.

Together, **we connect Europe!**



Monika Heiming
Executive Director

Our Association

Purpose

EIM was established in 2002 following the liberalisation of the European railway market by the European Commission. EIM's role is to provide a single voice to represent the interests of European Rail Infrastructure Managers (IMs) vis-à-vis all relevant European institutions and stakeholders, help members develop their businesses through the sharing of experiences, and contribute through its members to the technical and safety activities of the European Union Agency for Railways (ERA).

Membership

Today, EIM counts 18 members in 12 countries and represents more than half of Europe's railway infrastructure.

EIM's membership ranges from the far north to the south of Europe. In 2024, they include some of Europe's largest railway networks:

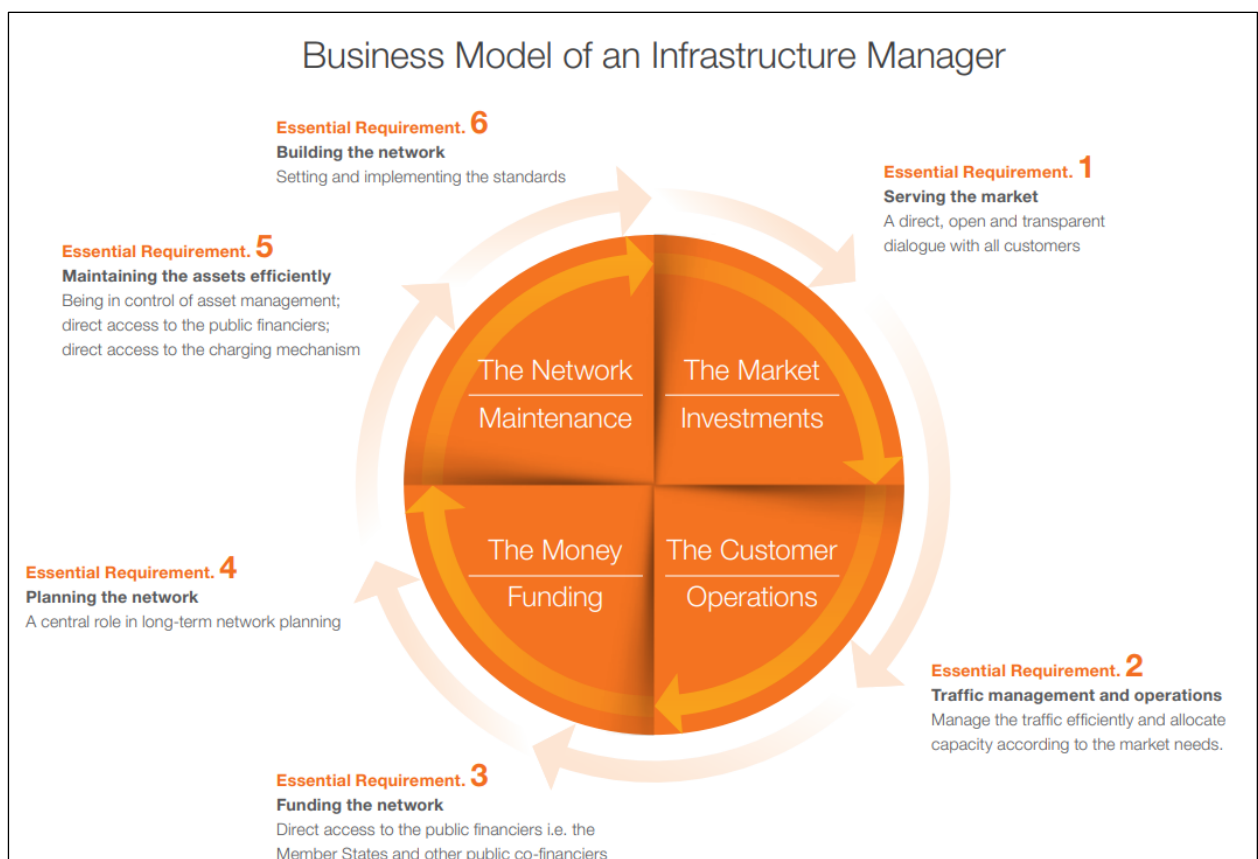
- ADIF (ES)
- Banedanmark (DK)
- Bane NOR (NO)
- Centralny Port Komunikacyjny (PL)
- High Speed 1 (UK)
- High Speed 2 (UK)
- Getlink (FR)
- Infrabel (BE)
- Infraestruturas de Portugal (PT)
- Irish Rail (IE)
- LISEA (FR)
- Network Rail (UK)
- Network Rail High-Speed (UK)
- PKP Polskie Linie Kolejowe (PL)
- ProRail (NL)
- SNCF-Réseau (FR)
- Trafikverket (SE)
- Väylä (FI)



Rail Infrastructure Managers

Rail infrastructure managers:

- ... provide and allocate the required capacity for the circulation of freight and passenger trains
- ... are essential for economy and society as they connect markets, regions, cities, hubs and people
- ... allow to transport high volumes with a comparatively limited space consumption
- ... help greening transport, improve its energy efficiency and reduce congestion
- ... enable mass-transport on national and international scale
- ... contribute to ensure safe and secure transport flows
- ... invest and innovate in people, assets and services
- ... contribute to the overall decarbonisation of the European economy



Our Political Priorities

EIM's priorities are summarised below:

-  Rail Infrastructure
-  Rail infrastructure Capacity Management
-  Funding and Finance
-  Track Access Charges
-  Security and Cybersecurity
-  Digitalisation and innovation
-  Procurement
-  Rail Legislation
-  Human Factor





Rail Infrastructure

Context

- Rail infrastructure is a critical key enabler for seamless rail transport across Europe.
- Rail infrastructure is part of the Trans-European Transport Network (TEN-T) which consists in the setup of different network layers (core, extended core, comprehensive) with specific technical and operational requirements for the different transport modes.
- The TEN-T deployment is co-funded via the Connecting Europe Facility (CEF).
- Military mobility has become an increasingly salient issue within the context of the aggression of Ukraine by Russia.
- Adaptation of rail infrastructure to climate change is increasingly identified by IMs across Europe as a critical issue to deal with.

Facts and Figures

- Rail is the greenest mode of transport, only accounting for 0.4% of the transport sector's greenhouse gas emissions.
- The new TEN-T Regulation introduces new technical and operational requirements for rail infrastructure managers.
- The core network layer of the Regulation is due to be deployed by 2030.
- The budget envelope of CEF has been consumed in 2024.
- No financial framework has been established outlining the financing of the obligations under the new TEN-T Regulation.

Political priorities

- Rail infrastructure managers (IMs) urge the EU to maintain **rail at the centre of the mobility strategy** given its inherent environmental advantages.
- IMs call on the EU to provide **sufficient funding** for the timely rollout of the different TEN-T layers, especially by increasing the budget of the next CEF.
- IMs call on the EU to consider **alternative technical options to overcome different track gauges** in the EU and with neighbouring countries.
- IMs call on the EU to channel **more funding towards adaptation** of the rail infrastructure to climate change on the TEN-T network.
- IMs call on the EU to foster investment in **dual use rail infrastructure**, thus strengthening both military mobility, passengers and rail freight on the TEN-T network

Rail Infrastructure Capacity Management

Context

- Rail infrastructure capacity is currently regulated by Directive 2012/34 EU as regards capacity allocation schemes.
- In 2023, the EC published a proposal for a Regulation for European rail capacity management¹, which is expected to be adopted between 2025 and 2026.
- In the proposal, the EC introduce a series of new requirements, e.g. new harmonised processes for capacity construction and allocation processes to face the expected increase in demand and the specific challenges of cross border services, a new governance structure for capacity management, a digital timetable, cooperation mechanisms, contingency measures, performance criteria.

Facts and Figures

- The Regulation, once implemented, shall increase capacity on the existing rail infrastructure by + 4%.
- The proposed Regulation introduces a series of non-legislative measures.
- The Regulation shall be fully implemented by 2030.

Political priorities

- Rail infrastructure managers (IMs) **welcome the Proposal** as it shall help make rail more competitive by optimising the utilisation of capacity of rail infrastructure, building on the projects and processes developed by rail infrastructure managers.
- IMs welcome the initiative of the EC to support the **digitalisation of capacity-related processes**.
- IMs consider that rail capacity is influenced by a **variety of factors**, such as rail infrastructure supply², ERTMS³, FRMCS, train operations, interoperability.
- IMs call on the EU to **provide financial support** during the development and migration phase to all rail infrastructure managers, given the substantial upfront investments needed.

¹ [COM_COM\(2023\)0443_EN.pdf \(europa.eu\)](#)

² Co-financed by the EU via the Connecting Europe Facility (CEF)

³ ERTMS (European Rail Traffic Management System) can generate up to 40% more capacity on the existing infrastructure, due to a reduced headway between the trains). FRMCS (Future Railway Mobile Communication System) which is currently under development and due to be deployed by 2033.

€ Funding and Finance

Context

- Investments in the rail infrastructure part of the TEN-T directly contribute to strengthening Europe's geostrategic, environmental, competitive and resilient position.
- They also help to reduce congestion in transport, increase energy efficiency and reduce carbon emissions.
- They are also essential to foster innovation by making rail networks smarter, more efficient and more resilient.
- Rail infrastructure managers are committed to get costs as low as reasonably practicable.

Facts and Figures

- Investment needs for the TEN-T core network: EUR 500 billion⁴
- CEF2 budget 2021-2027: EUR 25,81 billion; EUR 1,69 billion for military mobility
- Oversubscription rate under CEF2: 3-5 times

Political priorities

- Investments in rail infrastructure must remain **a top priority** in 2024-2029.
- European funding in 2024-2029 must be **increased in amount and scope** to enable rail infrastructure managers to maintain, renew, upgrade, digitalise and secure their networks and deliver a fully-fledged, resilient European TEN-T network.
- The Multiannual Financial Framework 2028-2034 must be **scaled up** by complementary funding and financing instruments, such as a Recovery and Resilience Fund 2.0.
- The budget of CEF 3 (2028-2034) should be **multiplied by the factor 4** to ensure the timely delivery of a competitive and fully-fledged Single European Railway Area.
- The management and rollout of CEF 3 should be **steered by the European Commission** while ensuring flexible deployment and project transition periods.
- Provide **fiscal and financial incentives** for rail infrastructure investments in strategic areas, such as tax exemptions for alternative energy projects, etc.

⁴ [Analysis accompanying the impact assessment for the revision of Regulation \(EU\) N° 1315/2013 on Union guidelines for the development of the trans-European transport network](#)

Track Access Charges

Context

- Track access charges (or rail tolls) are the price that Railway Undertakings have to pay to the Infrastructure Manager (IMs) to be allowed to run their trains on the network and make use of the services offered by the IMs.
- Rail infrastructure managers rely on track access charges as one of the main sources of income to maintain their assets.
- Track access charges are regulated by Directive 2012/34⁵, defining the legal requirements for the calculation and setting of track access charges by rail infrastructure managers as well as Implementing Regulation 2015/909 on the modalities of the calculations⁶.
- Track access charges shall be set at the cost that is directly incurred as a result of operating the train service.
- In 2021, the European Commission published an Action Plan to boost to boost long-distance and cross-border passenger rail addressing track access charges for different market segments.

Facts and Figures

- The economic model of Infrastructure Managers relies on a variable mix of public contributions.
- Track access charges are an essential part of rail infrastructure managers' revenue, representing in some cases more than 40% of the total revenue.
- During Covid-19, Member States were allowed to reduce the level of track access charges below direct costs and to compensate the rail infrastructure manager for the loss of income.
- In the second half of 2024, the European Commission intends to revise the guidelines on track access charges.

Political priorities

- Rail infrastructure managers (IMs) support a **harmonised approach to the calculation methodology** of track access charges.
- IMs call on the EU to maintain the core principle that Track access charges **should not go below direct costs** while safeguarding the financial viability of rail infrastructure managers.
- Incentives for specific segments or services granted by rail infrastructure managers should be **limited in time and scope and remain voluntary**.

⁵ <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex%3A32012L0034>

⁶ <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32015R0909&rid=1>

Security and Cybersecurity

Context

- Security and cybersecurity have become increasingly important to protect assets and people.
- The further digitalisation of railway assets and procedures require new forms of protection against digital threats.
- The EU has adopted several legal initiatives regarding data protection, cybersecurity (NIS2, CRA, CSA, RED).
- Since 2021, the European Union Agency for Cybersecurity (ENISA)⁷, in cooperation with other agencies, has been working on making the EU railways more resilient against physical and digital threats.
- Since 2022, the real and perceived threat landscape has increased, including for rail infrastructure.

Facts and Figures

- Rail infrastructure managers are being challenged by external cyber threats and increased risks of sabotage.
- Rail infrastructure managers are 'critical infrastructure'⁸ and must comply with specific legal obligations.
- Rail infrastructure managers need to deploy secure and cyber-proof products and services.

Political priorities

- Rail infrastructure managers (IMs) call on the EU to ensure a well-coordinated approach among the different sectoral and horizontal instruments to avoid legislative and regulatory overlaps.
- IMs call on the EU to adapt security and cybersecurity requirements to the specific needs of the railways while fostering cross-sectoral exchange.
- IMs call on the EU to include manufacturers and suppliers of digital products in all relevant EU legislation.
- IMs call on the EU to provide targeted EU funding mechanisms to increase the protection of rail infrastructure against security and cybersecurity threats.

⁷ Report of ENISA on Railway Cybersecurity in 2021, <https://www.enisa.europa.eu/publications/railway-cybersecurity-good-practices-in-cyber-risk-management>; Report of ENISA on Transport Threat Landscape in 2022, <https://www.enisa.europa.eu/publications/zoning-and-conduits-for-railways>

⁸ Directive - 2022/2557 - EN - CER - EUR-Lex (europa.eu)



Digitalisation and Innovation

Context

- Innovation and digitalisation are important levers to prepare the rail system and its infrastructure for future demands.
- Key technologies to achieve this objective are the European railway traffic management system ERTMS, the next rail mobile communication system FRMCS, automatic train operations (ATO), the digital traffic management system (TMS), digital automatic coupling (DAC), artificial intelligence (AI), etc.
- These initiatives have been developed by the joint research & innovation undertakings Shift2Rail (2014-2021)⁹ and Europe's Rail (ERJU) (2021-2027)¹⁰.
- The outcomes of these initiatives are then included in the Technical Specifications Interoperability (TSIs) developed by the EU Agency for Railways (ERA).
- IMs regret the delays in the delivery of certain technologies and products (e.g. ERTMS) by the suppliers which can slow down investment projects of IMs.

Facts and Figures

- Launch of a digital traffic management system by 2026
- End of mandate of Europe's Rail in 2027
- Pre-deployment of DAC between 2026-2028
- Final deployment of DAC from 2028 onwards
- Rollout of ERTMS on the TEN-T core network by 2030
- Migration towards FRMCS by 2033

Political priorities

- Rail infrastructure managers (IMs) call for a **harmonised and stable migration** to these technologies in order to maintain safe and seamless train operations on their network.
- IMs considers that this migration should be **steered and managed on European level** to ensure the necessary funding, the harmonised rollout and the timely delivery of these technologies.
- IMs call in particular on the EU to ensure the **timely migration to ERTMS by 2030** on the TEN-T core network and **to FRMCS by 2033**.
- IMs call on the EU to provide in a **timely manner specifications for FRMCS**.
- IMs also call on the EU and the Member States to provide the **necessary financial resources** for rail-related research and innovation by establishing an 'ERJU 2' under the next European Research Framework Programme and for the EU Agency for Railways.

⁹ Overall budget: EUR 450 million

¹⁰ Overall budget: EUR 600 million



Procurement

Context

- Rail infrastructure managers rely on manufacturers and suppliers to help them to maintain, operate, upgrade, renew and digitalise their rail infrastructure.
- Rail assets and products have particularly long life cycles of up to 40 years, and even longer for bridges and tunnels, which require ongoing knowledge and expertise in the supply market to maintain, renew or replace them.
- For the past several years, rail infrastructure managers have been confronted with a consolidation trend in the supply market, especially in the segment of control-command and signalling (ERTMS), current mobile communications technology (GSM-R).
- Rail infrastructure managers have specific procurement demands due to the fact that they are classified as 'critical infrastructure'.

Facts and Figures

- The number of suppliers of ERTMS has decreased over the last due to a consolidation in the industry.
- Suppliers are facing delays with the delivery of ERTMS to IMs which can slow down the deployment of the European network.
- Supply chain shortages affect the timely delivery of critical products for rail infrastructure (e.g. chips, steel, wood, batteries).
- The supply market for green, sustainable and energy-efficient products and services has yet to develop.
- A genuine market for harmonised, standardised and cyber-proof technology in rail does not exist, yet.

Political priorities

- Rail infrastructure managers (IMs) call on the EU to work towards a genuine **European rail market for suppliers, manufacturers and contractors**.
- IMs call on the EU to ensure **harmonised products and technologies**. The flexibility and freedom of IMs to choose suppliers in a competitive ecosystem should be preserved.
- IMs call on the EU to **incentivise products and services** which are sustainable, recyclable, energy-efficient but also cyber-proof and secure.



Rail Legislation

Context

- The EU has one of the densest railway networks in the world, composed of national railway systems.
- Since the 1990s, EU legislative activity in rail intensified to create a Single European Railway Area (SERA).
- Until 2030, the migration towards a single, harmonised and interconnected SERA shall be completed.
- The rail transport's competitiveness will be impacted by the revision of the Combined Transport Directive and the Weights and Dimensions Directive and the upcoming Proposal on multimodal ticketing in late 2024 or 2025.

Facts and Figures

- Adoption of revised Technical Specifications Interoperability in 2027
- Delivery of the Single European Railway Area by 2030
- Delivery of a fully-fledged TEN-T core network incl ERTMS by 2030
- Delivery of a new digital rail capacity management by 2030

Political priorities

- Rail infrastructure managers (IMs) call on the EU to provide them with a **stable, long-term regulatory roadmap** to strengthen the sector's preparedness.
- IMs call on the EU to optimise the implementation of the different railway packages via **simplified rules and processes** for all stakeholders concerned.
- IMs call on the EU and the Member States to **ensure the timely rollout of current and future key legislation**, such as TEN-T, ERTMS and FRMCS.
- IMs **welcome the proposal on the revision of the Combined Transport Directive** and believe that, if properly designed, the rail freight's competitiveness should be increased.
- IMs express their **concerns regarding the introduction of longer and heavier trucks** as foreseen by the revision of the Weights and Dimensions directive as it could cause a reversed modal shift from rail to road.
- IMs call on the EU to develop a **multimodal ticketing system** that allows seamless multimodal passenger travels hereby incentivising a modal shift.
- IMs support a Single European Railway Area for Train Drivers provided that rail safety is not at risk and that IMs' operational challenges are taken into account.

Human Factor

Context

- Rail infrastructure management requires specialised human skills and experience due to the nature of its business.
- Rail infrastructure managers aim for gender-equality and inclusion of young professionals.
- Rail infrastructure managers are also cooperating with academia and other facilities for knowledge building, research and attracting the suitable workforce.

Facts and Figures

- The demographic trend indicates that up to 50% of the current workforce in the rail sector and among rail infrastructure managers is set to retire by 2030.
- The loss of approx. 50% of the workforce cannot be compensated with the same percentage of young professionals due to the demographic change.
- Only 20% of the current workforce in the rail sector are women.
- The increasing digitalisation of the rail sector requires new forms of skills and experiences which need yet to be developed among the sector while 'traditional' skills are also needed.

Political priorities

- Rail infrastructure managers (IMs) call on the EU to continue and **reinforce EU programmes** to attract young people and women.
- IMs also call on the EU to **fund skilling and upskilling of the workforce** in rail.
- IMs advocate to launch a **new EU initiative** for training of the rail-related work force.

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