UNIFE POSITION PAPER ON THE TEN-T GREEN PAPER

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Summary

UNIFE, the European Rail Industry, welcomes the Commission's Green Paper on the future of the TEN-T policy.

Today, the main challenge for the TEN-T policy is that it should be used as a framework for an EU-wide development of transport infrastructure that serves European needs; in particular in terms of climate change and Member States' needs.

In this regard, UNIFE believes that the "Priority Network" approach proposed by the Commission, complemented by a "conceptual pillar" and a maintained comprehensive TEN-T network, could help creating a more consistent policy. However, this approach would only be successful provided that strong criteria are put in place for the definition of this network:

- The future priority network must give a clear priority to environmentally-friendly and safe transport modes such as rail; modal shift should be a clear objective of this network;
- It should consist in a limited list of interconnected key "mega-corridors" to focus investments on a realistic number of projects;
- The creation of a Very High Speed network within the priority network should be a major feature of the current TEN-T policy review;
- Lastly, full interoperability, and in particular the mandatory use of the European Rail Traffic Management System (ERTMS) should be a key characteristic of this network.

Besides the structure of the TEN-T, UNIFE believes that the ongoing review should also encompass financial resources that have so far been insufficient. Whilst the TEN-T budget gives a clear priority to rail, both EU funds under the regional policy and Member States' investments are largely focused on other means of transportation. An increased TEN-T budget, a true priority given to rail transport in the EU's regional policy, and the use of additional financial resources (revenues from ETS, Eurovignette, EIB loans or PPPs) are essential for a successful reshape of the TEN-T Policy.

Finally, the TEN-T policy would benefit from a new focus on implementation which would ensure that the projects are actually carried out. Corridor structures, in addition to the existing "Coordinators", should be envisaged to ensure that investments are well-coordinated on a given corridor/network. In the same idea, setting mandatory deadlines for projects' completion would help to force the various Member States' authorities to cooperate effectively.

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Introduction: the TEN-T policy, an essential pillar of the EU Transport policy and economic growth

UNIFE, the European Rail Industry, welcomes the review of the TEN-T policy launched by the European Commission in its Green Paper "*Towards a Better Integrated Trans-European Transport Network at the Service of the Common Transport Policy*".

Developing transport infrastructure across Europe is a key factor for economic growth in general and at a time of economic crisis, offers strong opportunities for both job creation and economic boost, in the rail sector in particular. At the same time, EU action is vital to help and boost the coordination of different projects that in many cases are traditionally driven by national interests. For this reason, **UNIFE considers that the TEN-T policy plays a crucial role not only for the sector, but for society in general**.

The TEN-T priority projects should be a priority for the European Union. According to a European Commission study[1], the gains to expect from the completion of the 30 priority projects are substantial:

- A GDP level increase by 0,2- 0,3 % by 2020;
- The creation of one million permanent jobs, in addition to 3 million temporary jobs created during the construction period;
- Time savings on travelling (EUR 8bn per year), congestion delays reduced by 14%;
- 4% reduction in greenhouse gases emissions.

For rail, the added value of European action is even more obvious. In fact, international railway transport is often handicapped by a number of obstacles originating in the past: infrastructure bottlenecks and lack of connections, different electrification systems, signalling systems, and even different railway gauges.

The development of infrastructure and rolling stock, technologies enabling interoperability such as the European Rail Traffic Management System (ERTMS), a better coordination amongst various stakeholders are critical to reach a proper "rail network without border", offering an even more competitive alternative to road transport. In this regard, TEN-T policy and funding clearly act as a "counterpart" of the work undertaken in the past years by the

[1] European Commission, *The Economic Cost of non-Lisbon*, Occasional Papers, n°16, 2005, p.51

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European Commission, the European Railway Agency, the other EU Institutions and the railway sector as a whole. Tools to ensure interoperability now exist – however, significant funding opportunities and European coordination are necessary to implement them.

Beyond the implementation of interoperable technologies and the coordination of European infrastructure projects, **UNIFE also believes that the TEN-T policy must be used as a tool to promote cleaner, safer and environmentally-friendly transport modes. We are of the strong opinion that the TEN-T budget should be increased and primarily targeted to railway projects, that do often not receive sufficient attention at national levels.**

1. An increased TEN-T budget should clearly prioritise rail transport

1.1. Status quo

1.1.1. The TEN-T budget cannot cover the needs

The TEN-T budget is a powerful instrument to translate political priorities into infrastructure projects.

However, the task at hand is immense. According to the European Commission, the total cost for the completion of the TEN-T network would amount to EUR 900bn, with a remaining EUR 500bn to be invested from 2007 to 2020.[2] As far as the Priority Projects are concerned, their cost would amount to EUR 400bn, with an estimated EUR 270bn still to be spent.[3]

In reality, very few priority projects have been completed so far and the resources allocated to the TEN-T budget (EUR 8bn for 2007-2013) are far from covering the financial needs. The total amount requested for TEN-T priority projects for the multi-annual programme 2007-2013 was EUR 11.5bn for a total of 30 priority projects. On the other hand, the available budget, excluding Galileo, is about EUR 5.1bn.

[2] Source : DG TREN website
[3] Idem

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Unfortunately, Member States do not compensate for this lack of financing at EU level. The 2006 Mid-Term Review of the White Paper on Transport noted that the level of investment in transport infrastructure has fallen in all EU Member States (except Spain) to less than 1% of GDP.

1.1.2. The priority given to rail transport in TEN-T is not reflected by other funding mechanisms.

UNIFE supports the EU institutions' preference for rail. Whilst the possible benefits of a co-modal approach are fully recognised by our industry, rail transport offers widely-acknowledged advantages in terms of CO2 emissions, safety and performance. These justify a priority treatment within the TEN-T policy.

This focus is very visible in the selection of the 30 priority projects: 22 of them are rail projects. It is also clear in the multi-annual programme 2007-2013, which awarded 74.2% of the amount dedicated to TEN-T priority projects to rail. However, this amount is far from being able to cover the cost of the TEN-T priority rail projects. Most of them still lag behind schedule and will not be completed in the short term.

There are many reasons for these delays and shortcomings. When focussing only on financing several problems need to be highlighted:

Firstly, **even if there is a clear priority for rail projects in the multi-annual programme, this is not the case for the annual programmes**. In 2007, out of EUR 112m available, 44% were awarded to rail projects.

Secondly, **Member States generally do not give priority to rail** when they decide on transport infrastructure investments. Most of the money spent by the EU Member States still goes to road transport projects.
This is even more obvious for the EU Regional Policy. For the 2007-2013 period, out of EUR 54bn allocated to transport projects, only 15bn will finance rail project whilst 30bn will be allocated to road projects. Although it is quite understandable that new Member States also need to develop their road infrastructure, rail transport should not be neglected as it is the most sustainable transport solution for the future.

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1.2. Recommendations

Rail will only be able to compete with other modes of transport and unfold its environmental benefits if a modern infrastructure is provided. Modal shift occurs where a reliable and rapid connection is available, such as high-speed lines for passenger transport (see next section). Infrastructures need to be up-to-date and of excellent quality. Therefore, a significant share of public investment (from the Member States and the EU) in transport should go to the rail sector.

1.2.1. TEN-T budget

As the TEN-T budget has proven to be highly insufficient, **it should be significantly increased during the next financial perspectives.** This will provide a clear incentive to Member States to launch major rail infrastructure projects.

As a truly "European financial resource", **the TEN-T budget should continue to focus on the greenest and safest transport mode: rail**. To this end, the criteria set for the funding of the "priority network" foreseen by the Commission should be strictly targeted at rail transport.

1.2.2. ERDF and Cohesion Fund

As far as the remaining EU financial instruments (ERDF and Cohesion Fund) are concerned, UNIFE believes that **they should be better targeted at environmentally-friendly transport** modes as a matter of priority.

More generally, UNIFE considers that **the EU Regional Policy should be better linked with the four following objectives of the European Transport Policy**:

- the completion of TEN-T priority projects;
- the implementation of rail freight corridors;
- the implementation of ERTMS;
- and modal shift to the most environmentally-friendly modes of transport.

Such coordination would enable the EU's regional policy to be better coordinated with the EU priorities in terms of transport.

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1.2.3. Other resources

Given the constraints of the EU budget and the need to financially support a wide number of different common policies, new resources should be found in order to increase TEN-T funding.

- Resources from the EU Emissions trading scheme

As provided for in the compromise between the Council and the Parliament on the revised EU Emission Trading Scheme:

> *"At least 50% of the revenues generated from the auctioning of allowances (…) or the equivalent in value of these revenues, should be used for one or more of the following:(…)to encourage a shift to low emission and public forms of transport"*[4]

The European Commission should take action in order to convince the EU Member States that a significant share of these 50% should be invested in TEN-T projects.

- Resources from the Eurovignette

The agreement reached within the European Parliament regarding the revision of the Eurovignette directive foresees that:

> *"As from 2011, at least 15% of the revenues generated by external costs and infrastructure charges in each Member State shall be dedicated to financially supporting TEN-T projects in order to increase transport sustainability. This percentage shall gradually increase over time."* [5]

UNIFE considers that these requirements should be put in practice at the latest within the timeframe proposed by the Parliament.

[4] Position of the European Parliament adopted at first reading on 17 December 2008 with a view to the adoption of Directive *2009/.../EC* of the European Parliament and of the Council amending Directive 2003/87/EC so as to improve and extend the greenhouse gas emission allowance trading system of the Community (2008/0013(COD)), article 10(3).

[5] European Parliament legislative resolution of 11 March 2009 on the proposal for a directive of the European Parliament and of the Council amending Directive 1999/62/EC on the charging of heavy goods vehicles for the use of certain infrastructures (2008/0147(COD)), amendment 57.

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- EIB loans and instruments supporting public-private partnerships

Trans-European networks are one of the 6 priority objectives of the European Investment Bank. In 2007, the EIB financed EUR 8.1bn for TEN-T projects and its objective for the period 2004-2013 is EUR 75bn. EIB loans to TEN-T projects have steadily increased in value since 2003, with a rising share of rail (46% of the 2007 loans). However, this share is still relatively low, considering that 22 TEN-T priority projects out of 30 are rail projects. **UNIFE calls upon the European Commission to urge the EIB to continue to step up its lending activity for TEN-T and to increase the share of rail projects among its loans to TEN-T projects**.

The EIB is also active in supporting public-private partnerships. The LGTT instrument created in 2007 as well as the European PPP Expertise Advisory Centre can be useful instruments. In the particular context of the economic crisis, **the EIB should reinforce these instruments to ensure continued private investment in TEN-T projects.**

2. Future structure of the TEN-T network

Globally, UNIFE supports the "option c" highlighted in the European Commission paper, consisting of a "dual layer with a comprehensive network and a core network".

2.1. Maintaining a comprehensive TEN-T network

UNIFE is strongly in favour of maintaining the current "comprehensive" TEN-T network approach, which has already brought significant advantages in terms of interoperability and harmonisation to the railway sector. We therefore strongly reject what is defined as "option 2" in the European Commission's Green Paper.

Indeed, the existence of a TEN-T comprehensive network is an indispensable tool for policies affecting the railway sector. To date the Technical Specifications for Interoperability (TSIs), which are the cornerstone of technical harmonisation for railway operations, apply directly to the TEN-T whilst national networks not being part of the TEN-T are exempted. A large number of EU regulations in the field of transport are applied similarly, such as the Eurovignette Directive that is currently under review.

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To enhance interoperability and strengthen the competitiveness of European railways, UNIFE strongly believe that the TEN-T network should be at least maintained, if not expanded. This does not prevent the EU to concentrate funding on a "priority network", as outlined by the Commission.

2.2. Moving on to a priority network

UNIFE agrees with the European Commission's statement that the current Priority Projects approach fails to take into account "network effects". However, the very reason behind the creation of Priority Projects was the need to concentrate funding on specific corridors/lines of importance. **A future "Priority Network" should not break this momentum and be limited in size to ensure that the selected projects are actually completed.** The creation of a limited number of "**mega-corridors**" as part of a "Priority Network" seems to offer promising opportunities in this regards.

The success of a possible "network approach" will depend greatly on the criteria that are retained to develop this network. **In other words, a "priority network" approach may only be successful if it reflects clear political priorities in terms of environmental protection and interoperability.**

For instance, UNIFE sees a clear advantage at imposing binding objectives on a "priority network", which would be stricter than the one imposed on the comprehensive TEN-T network. The implementation of the European Rail Traffic Management System (ERTMS) should be imposed on rail infrastructure belonging to this network, together with other requirements in terms of interoperability. This would strongly enhance the competitiveness and performance of rail traffic on this network. **As proposed by the European Commission, "full interoperability" should be a clear characteristic of this priority network.**

In addition, the priority network should reflect clear environmental objectives. As highlighted in the Green Paper, "*climate change objectives should be placed at the centre of future TEN-T policy and be reflected in a truly European approach*". Therefore**, UNIFE is of the strong opinion that environmental benefits should be a key criterion for the constitution of a priority network. This should aim for a modal shift from air and road transport to cleaner alternatives such as rail**.

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UNIFE perceives some advantages to promoting co-modality as suggested by the European Commission, and in particular to improving connections between harbours and airports to the European rail network. Such an approach should however not be detrimental to the priority given to rail, as mentioned above – financing should be targeted on railway links connecting these transport hubs to the European rail corridors.

UNIFE also considers that long-distance road links should not be part of such a priority network. Wherever possible, priority should be given to environmentally-friendly transport modes.

Lastly, UNIFE would like to insist that **the completion of the current priority projects should remain a priority**.

Including a fully-fledged European very high speed (VHS) network in the priority network

The history of transport has been marked by a constant pattern: the acceleration of mobility. In the field of rail transport, very high speed rail (above 250kph) has dramatically changed inter-modal competition, allowing rail to compete directly with air transport on medium distances. It is thus responding adequately to mobility demand without jeopardising the environment. However, until now, very high speed rail in the EU remains a purely Western European phenomenon, as these lines only exist in France, Spain, Italy, Germany, Belgium, the United Kingdom and the Netherlands. Even so it is acquiring a truly European dimension, as these networks are increasingly linked to one another and are thus offering very quick connections between the main cities of these countries. Considering the occupation rate of most trains, it has become clear that these trains respond to the population's needs in terms of transport.

Thus, the dramatic success of VHS rail makes this type of infrastructure increasingly attractive to other countries. In Sweden, investigation for a future VHS line between Stockholm, Gothenburg and Malmö has already reached an advanced stage. Poland has included a VHS line in its rail infrastructure master plan. The Czech Republic is thinking about it. In the long term, Hungary and Romania would also like to be connected to the VHS rail network. However, there is no real coordinated European approach regarding VHS rail besides the dedicated high speed TEN-T priority projects.

Now, there is a window of opportunity for the European Union to take action in order to develop a truly European very high speed rail network. Such an initiative is particularly relevant, since favourable conditions are currently met: increasing demand from the public for VHS connections and growing political support in the Member States. Besides, VHS rail investments are a sustainable solution in terms of environmental, socio-economic and safety benefits.

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The socio-economic rationale

VHS rail does not only improve passenger transport. It also has a dramatic effect on the economy. According to a study conducted by the Spanish government, the construction of the VHS network has had a threefold effect:

- The investment creates a positive economic shock (0.9% of the Spanish GDP in 2005);
- As a consequence, there is an important demand effect during the project construction (around 1.6% of the GDP in 2005), due to productivity increase.

Therefore, the total effect of rail investments on the Spanish GDP was about 2.5% in 2005 (sum of investment shock and demand effect).

Costs savings for the society resulting from modal shift should also be taken into account: there are considerable gains in time, energy and other externalities. According to a study from ADIF, the Spanish rail infrastructure manager, the new Madrid-Barcelona VHS line generates the following yearly savings[6]:

- EUR170m savings in time
- EUR49m savings in energy
- EUR106m in other externalities.

The total savings per year amount to about EUR325m/yr.

Locally, VHS rail also has a lasting impact on the competitiveness of the territories that are connected with it. Andalusia, once one of the poorest Spanish regions, has encountered a dramatic growth since the opening of the Madrid-Seville line in 1992. Thus, VHS rail makes sense from the perspective of the EU cohesion policy. Although it is mostly a Western European system so far, if it is implemented as well in Central and Eastern Europe, VHS rail can contribute to closing the gap between the current cohesion regions and the richer European regions.

Finally, connecting Western and Eastern Europe with a very high speed rail network would globally improve the competitiveness of the continent.

The environmental rationale

The European Union has committed itself to reduce its CO2 emissions by 20% by 2020. So far, outlooks for transport emissions contradict this objective. They continue to grow. VHS rail is a relevant solution to drastically decrease passenger transport's emissions.

Firstly, the energy consumption per passenger per kilometre of a VHS train is much lower than those of competing modes of transportation. As a result, VHS rail produces least CO2 emissions.[7] French statistics for example show that on a 500-km trip, high speed trains generate 7 gr of CO2 per passenger per kilometre, busses produce 17 gr of CO2 pkm, individual cars produce 47 gr CO2 pkm, planes produce 66 gr CO2 pkm.[8]

[6] Compared to the anterior situation (without high speed line)

[7] This is simply because electric traction is the only way of massively moving goods and people without burning fossil fuel and also because it allows for full regeneration of energy in braking.

[8] According to ADEME "éco-comparateur", for a 500-km trip; refers to the rate of CO2 emissions per kWh of electricity produced in France

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It is empirically demonstrated that wherever a new VHS rail project has been implemented it has created a dramatic modal shift. For instance, on the Madrid-Sevilla line, rail modal share grew from 19 to 53% after the opening of the VHS line. Similarly, on the Paris-Brussels line, rail transport market share grew from 24 to 52%. This engenders a dramatic decrease in energy consumption, air pollution and CO2 emissions.[9]

Secondly, land requirement to build a VHS line is much smaller than for motorways as the width for a double track train path is 15m vs. 28m for a motorway.

Thirdly, when a new VHS line is built, it frees capacity on conventional lines. This capacity can be used for freight, thus decreasing bottlenecks. If a modal shift occurs in the freight segment, due to increased capacity and the improvement of the services quality, this has, in turn, a supplementary beneficial effect for the environment.

The safety rationale

Very high speed rail is the safest mode of transport. So far there have not been any fatalities in a TGV accident in France.[10] In 2001, the average number of people killed per bn pkm was 0.2 for conventional rail, 0.4 for air transport, 0.4 for busses and coaches and 5.9 for passenger cars.[11]

Therefore, UNIFE considers that the development of a European very high speed rail network included in the priority network proposed by the European Commission, should be one of the key priorities for the review of the TEN-T policy. This would contribute to improving transport safety, decrease the impact of transport on the environment, and increase the competitiveness of Europe.

2.3. The "conceptual pillar": open questions

UNIFE understands that the European Commission would like to add, through a "conceptual pillar", a degree of flexibility to the "priority network" approach described in the Green Paper. Whilst such an idea may be attractive, its effectiveness largely depends on the criteria which are retained to define "projects of common interests".

For instance, the need to promote modal shift or new technologies could offer some interesting opportunities. In the same vein, the Regulation on European Rail Freight Corridors, which is currently examined by the EU Institutions, could

[9] Source: ADIF
[10] Please note that no statistics for this segment could be identified at the EU level.
[11] Source : European Environment Agency, *TERM 2005 09 — Number of transport accidents, fatalities and injuries (land, air and maritime)*

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necessitate specific funding and flexibility – it is likely that some of the lines covered by the freight corridors would not belong to the TEN-T network.

A conceptual pillar therefore appears useful, provided the content of possible policy measures responds to the same criteria as the ones set to define the priority network. Consistency of the overall TEN-T policy needs to be ensured.

2.4. Creation of a "core network"

Given the above, UNIFE considers the creation of a "core network" to be useful and feasible. However, such core network should – again – correspond to clear political priorities, in particular in terms of climate change and modal shift.

3. Promoting rail transport's competitiveness with the use of ITS including ERTMS

UNIFE is of the opinion that intelligent technologies offer a strong potential, both to improve the competitiveness of rail transport and interoperability (deployment of ERTMS, TAF and TAP[12]) and multimodal transport at the same time (harmonisation of rail/road ITS).

As regards ERTMS, UNIFE strongly believes that EU funding has a critical role to play in ensuring the deployment of this technology along the European railway network. As the full benefits of ERTMS are realised only when a significant number of neighbouring countries have made the necessary investments to upgrade their network, **EU funding is pivotal in increasing the pace of ERTMS deployment along the European railway network**.

In this regard, the EU funding provided so far has been largely insufficient - EUR 260 millions were granted during the previous ERTMS funding call in May 2007, while requests for funding amounted to EUR 1.5bn for the same period. An additional call for funding of EUR 240m has been launched in March 2009, but UNIFE believes this will fail to meet the existing demand for this technology.

[12] TAF stands for Telematic Applications for Freight, cf. Commission Regulation 62/2006/EC, 23 December 2005. TAP stands for Telematic Applications for Passengers: this Technical Specification for Interoperability is currently under preparation at the European Railway Agency.

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ERTMS being "typically" a European project where the EU can bring a significant added value, UNIFE believes that a significant increase of the budget allocated to this technology should be foreseen. The installation of ERTMS should be mandatory on the railway lines that are part of the "priority network". This is the way to significantly improve the competitiveness and performance of railway operations.

In addition, UNIFE believes that other ITS technologies can significantly contribute to improve the competitiveness of rail transport for freight as well as for passengers. As regards freight transport, the quick implementation of the Technical Specification for Interoperability on Telematic Applications for Freight will facilitate the exchange of information between all actors involved in freight transport. As far as passenger transport is concerned, the Technical Specification for Interoperability on Telematic Applications for Passenger could contribute to make rail transport more user-friendly by improving access to information before, during and after a journey. Much needs to be done in particular to improve tickets' booking for international trips by train. For this purpose, the TEN-T review should take into account these applications and facilitate their implementation.

UNIFE also believes that there is room for a greater compatibility between ITS applied to rail transport - where use is already widespread - and road transport. The use of harmonised/standardised ITS could for instance significantly improve co-modality on the future priority network.

4. A new focus on implementation: allowing the TEN-T to become a reality

Beyond the creation of a "priority" and "core" networks, UNIFE believes that practical measures could greatly improve the ability to complete infrastructure projects of all actors.

Non financial instruments: promoting a true "European" approach

Several non-financial instruments have proved to bring a significant added value, in particular in terms of international coordination. The complexity of railway systems that are greatly marked by diverging national rules and systems

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inherited from the past, are a key reason for the delays observed in some projects.

So far, the main element of European coordination has been the appointment of Coordinators on certain Priority Projects, who have proven to be catalysts for cooperation between Member States and more generally for the concerned priority projects.

Whilst this has proven useful, UNIFE believes this approach could be strengthened. Indeed, only 8 out of 30 TEN-T priority projects are covered by this initiative. **UNIFE recommends that European coordinators are appointed for each priority project and beyond, to all trans-national lines to be upgraded, modernised or built**. In particular, this kind of coordination should aim at completing (technically and time-wise) projects in a harmonised way, on both sides of the borders.

A "corridor approach", as it already exists with ERTMS corridors, brings a significant added value by gathering relevant stakeholders in a dedicated structure – sometimes taking the form of a European Economic Interest Grouping (EEIG). Such structures greatly help to coordinate investments, but also identify obstacles and bottlenecks on a given corridors. **The Commission should envisage making a better use of a "corridor approach" to improve the completion of the TEN-T network. This measure could be used in conjunction with the appointment of European coordinators.**

In conclusion, UNIFE supports a "corridor approach" coupled with a certain degree of coordination between the various parts of the future priority network. Such an approach would be useful to exchange experiences and best practices, and ensure that stakeholders share common goals and objectives.

UNIFE also believes that **setting mandatory deadlines for projects' completion would be helpful to force the various Member States authorities to effectively cooperate. EU funding could be conditional to the completion of a project by an agreed date.**

Besides coordination, technical assistance is of great help when preparing and implementing rail infrastructure projects. In this regard, **UNIFE would like to underline its support to the JASPERS initiative.**

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About UNIFE

UNIFE, the Association of the European Rail Industry, represents 60 of Europe's leading large and medium-sized rail supply companies active in the design, manufacture, maintenance and refurbishment of rail transport systems, subsystems and related equipment. A further one thousand suppliers of railway equipment partake in UNIFE activities through 15 national rail industry associations. UNIFE members have an 80% market share in Europe and supply more than 50% of the worldwide production of rail equipment and services.

UNIFE represents its members' interests at the level of both European and international institutions. On the technical side, the association works on the setting of interoperability standards and coordinates EU-funded research projects that aim at the technical harmonisation of railway systems.

UNIFE's mission is to pro-actively develop an environment in which UNIFE members can provide competitive railway systems for increased rail traffic.

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