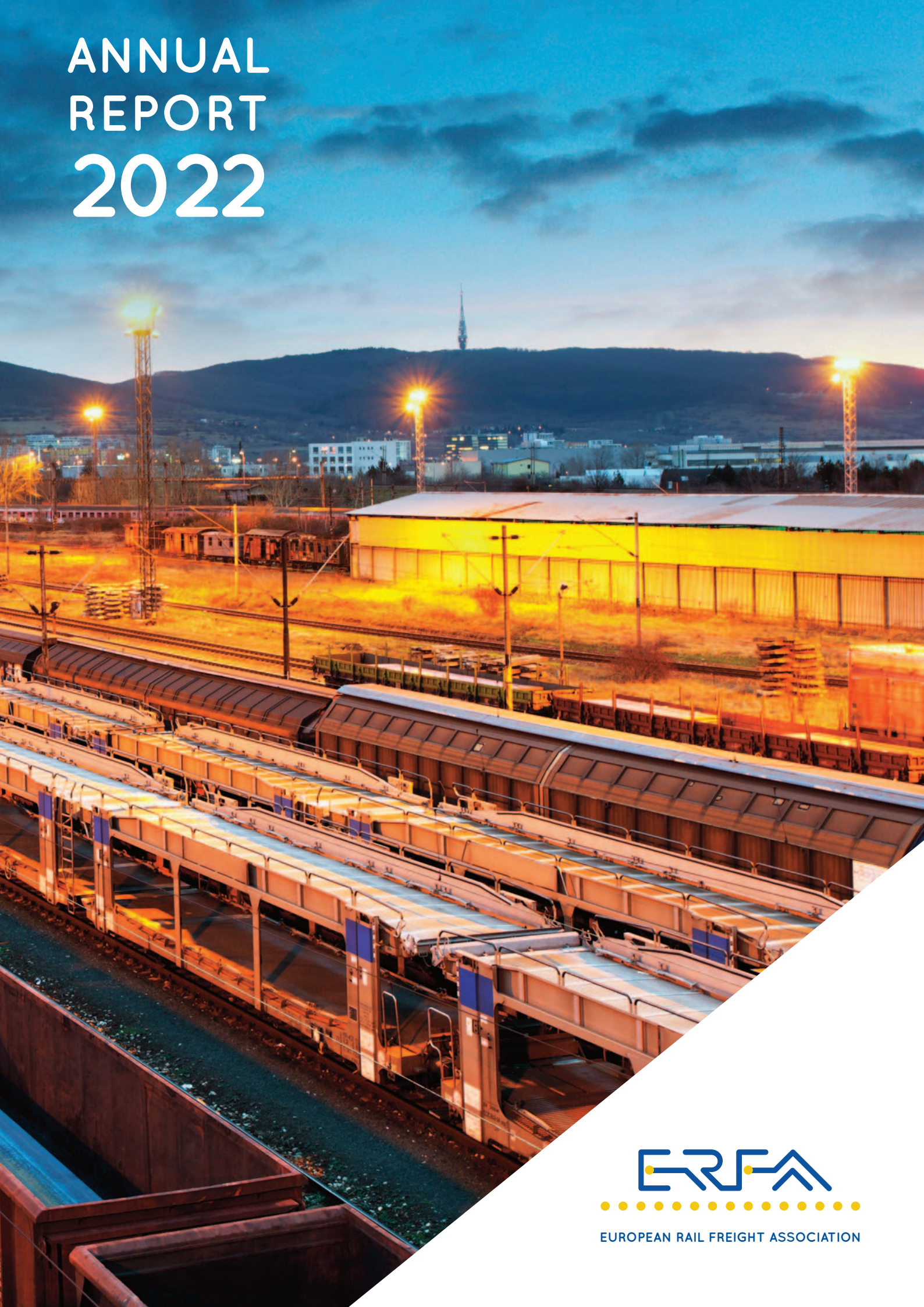


# ANNUAL REPORT 2022



EUROPEAN RAIL FREIGHT ASSOCIATION

ERFA



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## President's Foreword

In my role as President of ERFA, I am pleased to be able to share with you the annual report of 2022. Towards the end of 2022 I entered my fourth year as President of ERFA, and it has been an eventful period in which we had had to grapple with unforeseen challenges to the rail freight sector and European supply chains.

In the first months of 2022, rail freight was in a positive place as the worst of the COVID-19 pandemic was behind us. The pandemic had created staffing issues, changes to how we worked and, even in some cases, erected barriers to international trade flows. This normality was not long lived though as 2022 also saw the invasion of Ukraine by Russia – something we all thought unthinkable entering the year.

The war in Ukraine, and the subsequent energy crisis, has led to an unprecedented surge in energy costs. One of the largest increases has been observed in the cost of electric traction. On average, the cost of energy for rail freight undertakings increased from 50 Euro per kWh to 350 Euro per kWh. In some cases, this increase has even been up to 500 Euro per kWh. The price increases in other means of propulsion, particularly diesel, are not comparable. Rail freight is disproportionately impacted by this rise in energy costs as rail is the only means of freight transport which has transitioned to electricity on a mass scale. There is a risk that energy costs could therefore impact the European Union's growth targets for rail freight and subsequently undermine pre-established climate goals.

Besides the energy topic the situation rail freight faces on infrastructure in major networks has become very crucial. A high intensity of construction works, infrastructure capacities at their limits and lacking international coordination between infrastructure managers have reduced the availability and quality of paths for freight trains to a limit which restrict the potential of rail freight where the targets for shift to rail are endangered.

During 2020, ERFA celebrated its 20<sup>th</sup> anniversary. This was an important milestone event in which we could share progress made in delivering a competitive rail freight market. One of the key takeaways of the event was the reality that almost half of the European rail freight was made up of challengers to incumbents. At the point of writing this annual report, the majority of the European rail freight market is now challengers.

The composition and structure of European rail freight has therefore changed. Direct State Aid to national operators is no longer possible nor desirable. To protect this modern rail freight market, we need support measures which allow rail freight to continue to function in a sustainable manner, as was the case with the reduction of Track Access Charges during the COVID-19 pandemic, rather than getting to a point where companies need to be rescued or, more realistically, allowed to collapse.

I look forward to continuing to work together with all our partners to ensure that European policy on rail freight increasingly reflects the changing DNA of the industry.



A handwritten signature in blue ink that reads "Dirk Stahl". The signature is written in a cursive, slightly slanted style.

**Dirk Stahl**  
President

## Secretary General's Foreword

The past year was an important point in the revision of the TEN-T Regulation. The TEN-T Regulation is the cornerstone of European Transport policy and defines what are the core transport corridors, what standards infrastructure must be developed to along the corridors and by when. As rail freight is heavily reliant on a good quality of infrastructure, the revision of the TEN-T Regulation, and the level of ambition within, will impact rail freight for the next 10-20 years. Looking into 2023 and taking into consideration the positions reached by European Institutions in 2022, it will be important that in upcoming negotiations on a final text that three things are achieved.

Firstly, it is critical that European Institutions agree on clear infrastructure parameters. Critical amongst these is train length. Infrastructure along the TEN-T network must be developed to allow for the running of 740-meter trains, without conditions attached. This should not be confused with a capacity management discussion, which will come in due course, but rather ensuring the basic infrastructure is in place throughout Europe, with common standards, which would theoretically allow for 740-meter train runs throughout Europe.

Secondly, it must be recognised that the current ERTMS strategy is not working. Deployment of on-board ERTMS units is not progressing as initially planned. This is largely because there is a limited business case for rail freight undertakings as most of the benefits of ERTMS are long-term and indirect, namely the freeing up of capacity. The revised TEN-T Regulation needs to adopt an approach which ensures that ERTMS deployment happens in a synchronised manner with appropriate funding at EU and national levels for trackside and onboard deployment.

Thirdly, it will be important that the European Commission, Council and Parliament monitor developments in other legislative files during negotiations. On 21 June, the European Commission will present its "Greening Transport Package". This will include important legislation for rail freight, particularly on cross border rail and a revision of the train driver's directive. The link between these files and the TEN-T Regulation should be assessed continuously over the next year.

The coming year will therefore be a busy year in developments in rail freight policy. By the end of 2023, we should have an agreement on TEN-T, whilst also having a good understanding of how capacity management rules for cross-border traffic, certification of train drivers and incentives for combined transport will develop. We look forward to working together to ensure there is a good outcome for rail freight on all these strategic files.



A handwritten signature in blue ink that reads "Conor Feighan". The signature is fluid and cursive.

**Conor Feighan**  
Secretary General

## About ERFA

ERFA today represents 25 members, active in the whole value chain of rail transportation who operate across the European network.

The association was established in Brussels in 2002 by a handful of new rail freight operators. It was established as the voice of new entrants to support the European vision for a liberalised railway market.

All ERFA members share a commitment to work towards a non-discriminatory, competitive and innovative Single European Railway market by promoting attractive, fair and transparent market conditions for all rail enterprises.

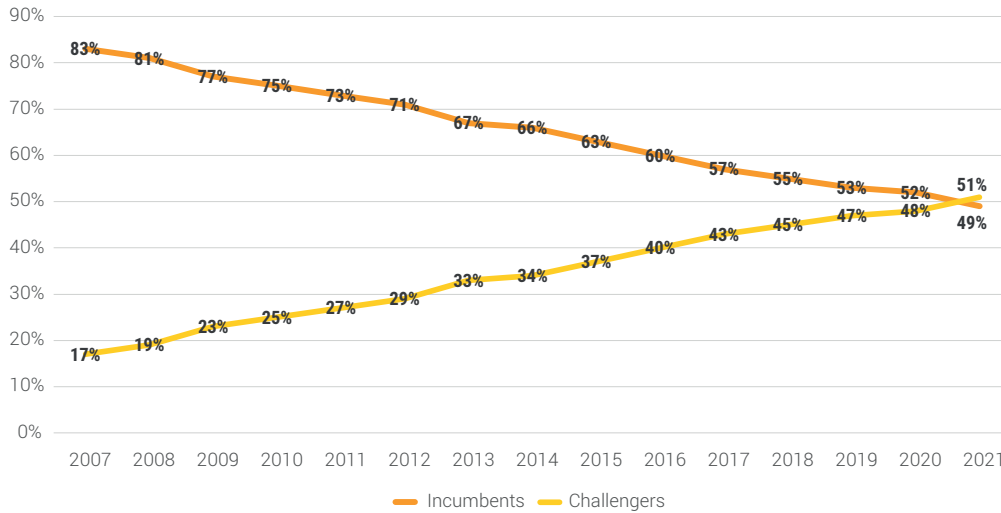
ERFA aims to achieve the best conditions for a competitive railway freight sector. Creating a more business-friendly environment and with a strong focus on the customer is key to rail's development. Our mission is to promote rail freight transport as a first and viable choice for customers and to ensure full market opening of rail across all of Europe.

ERFA's objective is to represent the voice of private and independent rail freight companies in Europe. We support the EU decision-making process with a focus on policy and technical affairs. Our focus is on generating growth for demand in rail freight services and shifting more goods onto eco-friendly rail.

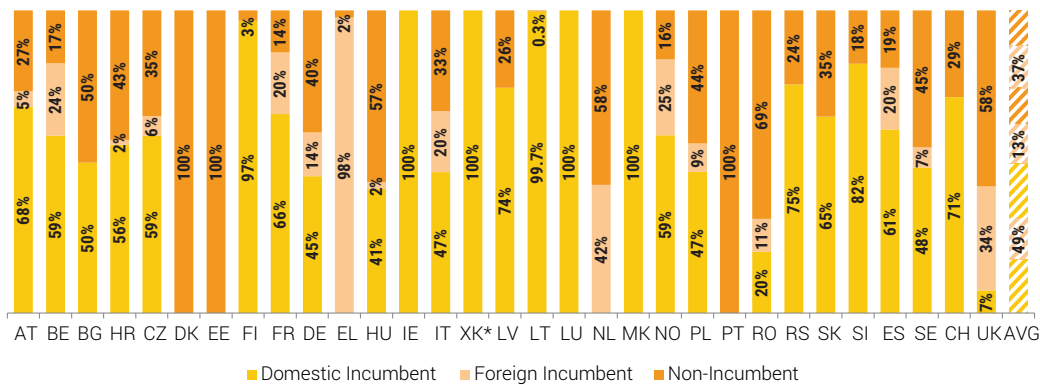


# Private and Independent Railway Undertaking in Numbers

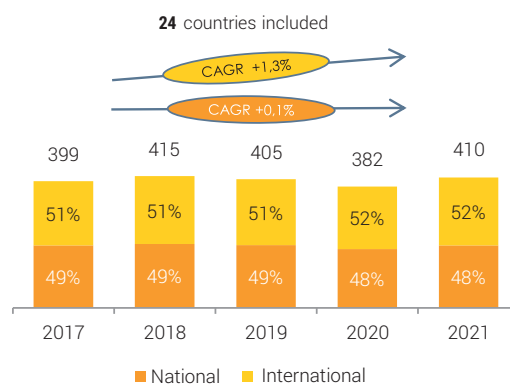
Market shares of incumbents and challengers (2007-2021)



Market shares of freight railway undertakings in 2021 (based on train-km)  
(In percent)



National and international freight traffic (in billion net tonne-km) from 2017 to 2021



IRG Rail







# Board of Directors and ERFA Staff

## ERFA BOARD OF DIRECTORS

### President and Vice-President



**President**  
**Dirk Stahl**  
CEO  
*BLS Cargo*



**Vice-President**  
**Maciej Gladyga**  
Managing Director  
*IGTL*

### Directors



**François Coart**  
Strategy Director  
*Europorte*



**Silvia de Rocchi**  
Policy, Regulatory and  
Institutional Affairs Director  
*Captrain Italia*



**Wolfgang Groß**  
Director of Competition Policy  
*Netzwerk Europäischer Eisenbahnen*



**Paul Hegge**  
Director Public Affairs & Corporate  
Social Responsibility  
*Lineas*



**Matthias Knüpling**  
Head of Business Development  
*VTG Rail Europe GmbH*



**Michał Litwin**  
Director General  
*ZNPK*



**Gintautas Lukauskas**  
Commercial Manager  
*GG Rail*



**Yuriy Maslikov**  
Director  
*Ost-West Logistik*



**Bruno Silva**  
Executive Director  
*MEDWAY*



**Irmtraut Tonndorf**  
Communications Director  
*Hupac*



**Markus Vaerst**  
Managing Director  
*CRE*

### ERFA STAFF



**Secretary General**  
**Conor Feighan**



**Policy and  
Communication Adviser**  
**Josselin Petit**

# ERFA Members

ERFA today represents  
25 members, active in the  
whole value chain of rail  
transportation operating  
across the European network.

**akiem**



**BERTSCHI**

**bls cargo**

**CAPTRAIN**

CARGO RAIL EUROPE

**DIE GÜTERBAHNEN**

**duisport  
rail**

**EUROPORTE**

**FER  
CARGO**

**GARGŹDŲ GELEŽINKELIS**  
VEIKANČIŲ AKTIVŲ SUBSISTEMOS

**HELROM**  
Trailer Rail

**HUPAC**



**LINEAS**  
YOUR FREIGHT FORCE

**LTE**  
logistics & transport

**MEDWAY**  
Transport & Logistics

**MEV**  
INDEPENDENT RAILWAY SERVICES  
TEX GROUP

**OST-WEST**  
LOGISTICS

**RFG**  
Rail Freight Group

**Touax**

**TRANSACHEMA**  
E-RAIL

**VTG**

**ŽESNAD.CZ**

ZWIĄZEK  
WIEKLOSNYCH  
PRZEWOZNIKÓW  
KOLEJOWYCH

# Who we work with

## Other organisations

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## European institutions



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## ERFA'S MAIN OBJECTIVES

1

REMOVE REMAINING  
MARKET ACCESS  
BARRIERS

2

IMPROVE THE QUALITY  
AND PERFORMANCE  
OF RAIL SERVICES

3

REDUCE THE COST  
OF RAIL

4

CREATE A LEVEL  
PLAYING FIELD  
BETWEEN ROAD  
AND RAIL

# 1

## Remove remaining market access barriers

- **Vehicle legal obligations and authorisation** – In the long-term, harmonisation of authorisations and legal obligations for vehicles would be welcome. The existence of divergent rules within various national legal systems for vehicle authorisation creates significant market access barriers. However, the initial investment required by railway undertakings is significant and consideration has to be given to how the industry can be supported in the transition from existing national authorisations to European authorisations. This process should be as seamless as possible.
- **Language requirements** – The various language requirements place a significant burden and introduce additional costs on operating freight trains across borders. These requirements make rail freight less competitive than other modes of freight transportation which do not have such language requirements. It is crucial for the development of rail freight that a European standard for communication across the entire network is agreed upon. This should ensure that a driver can drive in all EU member states once the driver complies with this European standard.
- **Implementation of the Fourth Railway Package** – Full implementation of the Fourth Railway Package is crucial to finally remove existing market access barriers. This must include total independence of infrastructure managers.

# 2

## Improve the quality and performance of rail services

- **International Timetabling** – For rail freight to be able to provide an internationally competitive offer, it needs an international timetabling system. Existing national timetabling can lead to non-optimal capacity allocation for both railway undertakings and infrastructure managers. Ongoing industry initiatives on the development of an international timetable should continue to be supported.
- **Temporary Capacity Restrictions** – When works are required on networks, it is crucial that there is a strong level of coordination between infrastructure managers so as to ensure these works are coordinated at an international level. There needs to be a strong focus on ensuring not only that works are coordinated across Member States, but also that freight can continue to flow. This may require coordination by agreeing alternative routes in the case of temporary capacity restrictions.
- **Rail Freight Corridors** – The Rail Freight Corridors Regulation needs to be revised and strengthened so as to ensure that the rail freight corridors meet the needs of the rail freight industry. Crucially, the Regulation needs to ensure that rail freight has a sufficient quantity and quality of capacity along corridors, that rail freight has pre-defined rights along corridors and that all corridors have common standards (P400 compatible, 740 meters, etc.).



# 3

## Reduce the cost of rail

- **ERTMS/ETCS** – The deployment and development of infrastructure should be included in upcoming CEF calls. These calls should also include deployment of ERTMS as well as ETCS systems within trains. The deployment of ETCS is a significant financial burden for operators. One that may lead to increased costs for rail freight and adding to the uneven playing field. Financing for ETCS is crucial.
- **Track access charges** – Infrastructure managers need to ensure that track access charges allow railway undertakings to be competitive with other modes of transport. High track access charges have the potential to lead to less rail freight and subsequently less revenue received through charges.
- **Digital Automated Coupling** – Coupling and decoupling is a timely and costly process. For Digital Couplers to be beneficial for all Railway Undertakings, they have to be rolled out throughout the EU in a coordinated and harmonised way. ERFA is represented in the EU DAC Delivery Programme that currently works on a sound migration plan that includes the interested private and incumbent Railway Undertakings throughout the EU. Suitable financing mechanisms are essential.



# 4

## Create a level playing field between road and rail

- **Green Deal** – The European sector of railway undertakings calls for an ambitious Green Deal to implement the 'user pays' and 'polluter pays' principles. Rail freight as a competitor to road transport would therefore benefit from a resubmitted, strong Eurovignette Directive. The EU's transport emissions have increased by 28% since 1990. Increasing the market share of rail freight transport from 17% today to 30% in 2030 (as suggested by the Rail Freight Forward Initiative), more comprehensive road charging and ending subsidies on aviation would support the EU's endeavours to reach the Paris Agreement's climate goals.
- **State Aid Guidelines** – The State Aid Guidelines for Railway Undertakings should be revised as to provide a clear legal framework for the sector on when and where state support is possible. The rail freight sector is a competitive sector and it is imperative that the State Aid Guidelines for Railway Undertakings make clear that companies active in the sector cannot receive operational aid, either directly or through cross-subsidisation, which has the potential to distort the market. The revised Guidelines should also look to ensure that State Aid that is of common good to the sector continues to be permitted. The aid should focus on infrastructure use, aid reducing external costs and interoperability aid.





ERFA



## ERFA Annual Event and ERFA Study

As it was founded in 2002 in light of the liberalisation of the European rail freight market, ERFA celebrated its 20<sup>th</sup> anniversary in 2022. In that occasion, ERFA tasked ECM Ventures to conclude a study on the current status of liberalization. The study discussed market structure and competitive arena, and the important role that *challengers* (formerly referred to as *new entrants*, as well as the foreign operations of incumbents) played in driving rail freight growth and innovation.

The study examined the market situation in selected European markets (Germany, Poland, France, Italy, the Netherlands, Belgium and Portugal), and discussed the challenges to achieve further growth of rail freight based on interviews conducted with CEOs and other senior executives at 13 major rail freight companies. These challenges were systematically analysed by applying an issue tree methodology. The study concluded with 10 measures to help overcome the issues and to boost volume and the modal share of rail freight.

In the first decade of the 21<sup>st</sup> century, new entrants became a driving force behind efficiency improvement, international traffic development, and technical and commercial innovations. Challengers were instrumental in growing the European rail freight market and have captured nearly half of the market. It is expected that their market share will further increase in the 2020s.

The study highlighted that the future growth of rail freight in Europe is hindered by numerous issues in the fields of lagging infrastructure development, poor infrastructure and traffic management, costly ERTMS/technology investments, complex and incomplete regulations, and unhealthy competition.

The study presented a list of measures to allow rail freight to succeed in shifting even more cargo from road to rail, and towards achieving a 30% rail modal share by 2030:

- Railways, especially challengers, need to further invest in expanding their asset base, implementing new technology, and continue efficiency improvements and maintaining high customer service levels.
- Infrastructure managers need to focus on accelerating TEN-T implementation, debottlenecking international corridors, deploying fast and smart digitalisation, improving planning and international coordination of construction works, and improving internationally coordinated capacity planning and management.
- Regulators and competition authorities should focus on securing fair capacity allocation, harmonised and open ERTMS standards, fair competition, and on developing new state aid rules.

The findings of the study, along with keynote speeches and a panel discussion, were presented to policy makers and business representatives during the ERFA's annual event that took place in Brussels, on 24 March 2022.

Adina Vălean, European Commissioner for Transport, gave a video address where she highlighted the importance of rail freight to achieve the goal of climate neutrality by 2050. Dirk Stahl, ERFA President and CEO of BLS Cargo made a keynote speech where he presented a state of play of the liberalisation of the rail freight market. Dieter Schneiderbauer from ECM Ventures presented the main findings, the structure and the proposed measures of the ERFA study.

The presentation was followed by a panel discussion moderated by Irmtraut Tonndorf, Communication Director at Hupac. The participants were Henrik Morch, Director for Transport, Post and other Services at the European Commission's Directorate General for Competition (DG COMP), Kristian Schmidt, Director for Land Transport at the European Commission's Directorate General for Mobility and Transport (DG MOVE), Sven Flore, CEO of SBB Cargo International and Vice-President of NEE, and Ueli Maurer, Head of Intermodal Network at Bertschi AG.



Download our study here

# Highlights 2022



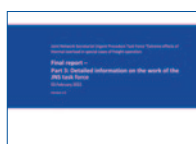
**18 JANUARY**

**Roberta Metsola elected as the new president of the European Parliament**



**24 FEBRUARY**

**Start of Russia's invasion of Ukraine**



**02 FEBRUARY**

**JNS Urgent Procedure task force on LL brake blocks issued its final report**



**31 JANUARY**

**The Commission opened in-depth investigation German support measures in favour of DB Cargo**

The Commission is concerned that EU State aid rules might have been breached, giving an undue advantage to DB Cargo over its competitors, especially when it comes to the profit and loss transfer agreement between DB AG and DB Cargo that is ongoing since 2012.

**09 FEBRUARY**

**The European Court of Justice annulled a Commission decision rejecting a complaint against an alleged abuse of dominant position by PKP Cargo in Poland**

**28 FEBRUARY**

**Adoption of the Regulation extending the emergency measures on lowering, removing or postponing TAC payments up until late June 2022**

16 MARCH

Conclusion of the Commission's public consultation on the revision of the State Aid Guidelines for Railway Undertakings



30 MAY

ERFA Secretary-General Conor Feighan participated in the International Railway Summit in Berlin



12 MAY

Commission published an action plan for EU-Ukraine Solidarity Lanes

The communication detailed short, medium and long-term actions aiming to facilitate Ukraine's agricultural export and bilateral trade with the EU while Ukrainian Black Sea ports were blocked by the Russian Navy at that time.

24 MARCH

ERFA held its annual event in Brussels in celebration of its 20th anniversary

The event served as an opportunity to present the main findings of ECM Venture's study on the Liberalisation of Rail Freight over the last 20 years in front of industry stakeholders and policy makers.



20 APRIL

ERFA Secretary-General Conor Feighan gave a presentation on supporting rail freight without distorting competition at the 2022 Track Access Charges Summit in Rotterdam



18 MAY

ERFA Board of Directors meeting took place in Bern, Switzerland, in the office of BLS

22 JUNE

ERFA Secretary-General Conor Feighan took part in a panel discussion on reinforcing synergies between rail and ports at ERA's Multimodal Freight Conference in Le Havre, France



**29 JUNE**

**Selection of a first list of 135 projects to receive funding from the Connecting Europe Facility (CEF)**

77% of them are related to rail. €25,8 billion will be available for grants to co-fund TEN-T projects in the CEF for the period 2021-2027.



**01 JULY**

**Launch of the Czech Presidency of the Council of the European Union**

**30 JUNE**

**Extension of regulation waiving or reducing TAC payments for a further 6 months, until 31 December 2022**



M. Knopp

**09 JULY**

**European railways CEOs signed a commitment of the European railway sector to support Ukrainian Railways (UZ)**

Among the signatories, Dirk Stahl (CEO of BLS Cargo and ERFA President) and Bernard Gustin (Executive Chairman of Linesa) represented ERFA.

**09 SEPTEMBER**

**Commission cleared the acquisition of joint control of VTG by GIP, Azure and OAC**

**10 OCTOBER**

**Commission approved a €450 million French scheme to support single wagon load traffic**



**04-06 OCTOBER**

**The 2022 International Rail Forum & Conference (IRFC) took place in Prague**

ERFA Secretary-General Conor Feighan participated in a panel discussion on the resilience of the TEN-T network with other stakeholders.



**20-23 SEPTEMBER**

**World's largest railway trade fair Innotrans took place in Berlin after being cancelled in 2020**

### 08 NOVEMBER

Commission launched application call for joining the future Single European Railway Area Forum



### 10 NOVEMBER

ERFA Secretary-General Conor Feighan participated in the Seminário Transporte Ferroviário taking place in Lisbon



### 31 OCTOBER

New Eurostat data show rail freight up 8,7% in 2021 compared to the previous year

### 18 OCTOBER

The Commission announced the publication of a “Greening Freight Package” in the second quarter of 2023

The package will include a proposal on capacity management and a revised version of the directives on Combined Transport, Weights and Dimensions and Train Drivers.



### 17 NOVEMBER

ERFA involved in the Railway Congress organised in Warsaw

ERFA Vice-President Maciej Gladyska (IGTL) chaired a session dedicated to the European rail freight market, where ERFA Secretary-General Conor Feighan introduced the results of the ERFA Study while Dirk Stahl took part in two panel discussions on how to achieve the Single European Railway Area.

### 06 DECEMBER

EU Council adopted a joint approach lowering the ambition of the Commission proposal on the revised TEN-T Guidelines Regulation

Further negotiations with the Commission and the European Parliament will follow once the latter has adopted its own position on the file.

# POLICY DEVELOPMENTS

## ERFA expressed clear positions on issues faced by the rail freight sector

On 15 July, ERFA welcomed a new Council regulation introducing rules to simplify procedures for State Aid to green transport. The new text allowed the European Commission to introduce a Block Exemption Regulation for certain **State aids** deemed compatible with the internal market. ERFA supported the initiative as simplifying the granting of State Aid, so long as it is based on open, transparent and non-discriminatory procedures and clear compatibility conditions, will encourage Member States to introduce support measures to help in achieving modal shift.

On 09 September, alarmed by the dramatic increase of **energy prices**, ERFA warned that there was therefore a high risk of reverse modal shift and fundamental change in the composition of the European rail freight sector. Many smaller railway undertakings were at risk of leaving the market or even bankruptcy. Support measures were essential to support the sector and ensuring that 20 years of market opening were not undermined.

On 21 December, in a press release wrapping up the year, ERFA listed a number of challenges faced by rail freight operators throughout 2022. The list included unprecedented increases in energy costs but also the difficult situation due to **ongoing infrastructure works** throughout the European network. This led to sudden changes or cutbacks to available capacity – often at short notice. In many cases, the level of coordination is low, and it is extremely difficult to subsequently develop reliable services for end users. Lessons must be learnt.

## ERFA joined forces with like-minded organisations to make the voice of rail freight stronger

On 03 March, **ERFA** together with **ALLRAIL**, the Alliance of Passenger Rail New Entrants in Europe, and Forum Train Europe (**FTE**), an international organisation for coordination and exchanges between European railway undertakings, unveiled a set of common positions, on **cross-border rail capacity management**. The two documents were more specifically focussed on commercial conditions and an international body for compliance.

These texts were complemented by a new set of common positions between ERFA, ALLRAIL and FTE published on 21 October, on **market-oriented capacity management, process harmonisation and efficient IT support**. This joint effort aimed to benefit from the technical expertise of FTE, as well as ALLRAIL and ERFA memberships, together with the communication capabilities of Brussels-based associations, as to clearly and loudly express the specific concerns of railway undertakings in the policy discussion on the future of cross-border rail capacity management.

On 20 October, in light of a meeting of European Transport Ministers, ERFA, the International Union of Wagon Keepers (UIP) and the International Union for Road-Rail Combined Transport (UIRR) called for short-term measures to protect European supply chains from **unsustainable energy prices increases**. All three organisations asked Transport Ministers to apply Regulation (EU) 2022/1854 on an emergency intervention to address high energy prices to traction electricity used by rail freight.



On 01 December, the main organisations representing the railway sector in Brussels (ERFA, CER, UIP, UIRR and UNIFE) wrote a joint letter to the EU Ministers responsible for Transport, urging them to adopt an agreement on a joint approach regarding the **TEN-T Regulation** in line with the ambition laid out by the Commission's proposal. For rail freight, it meant infrastructure developed in a timely manner as to facilitate the volume increases and enable the modal shift objectives set by the EU Sustainable and Smart Mobility Strategy.

## ERFA took part in policy discussions on future files addressing key challenges of the sector

On 11 February, ERFA published its position paper on the Commission's proposal on a revised Guidelines Regulation for the development of the Trans-European Transport Network (TEN-T). ERFA supported many of the provisions within the Commission's proposal, but called for further clarification and elaboration in key areas such as anticipation of planned construction works, or ETCS deployment.

On 16 March, the European Commission concluded its public consultation on the revision of the **State Aid Guidelines for Railway Undertakings**. ERFA communicated on its support for a modernisation and a revision of the Guidelines. State aid can play a big role to support the modal shift. However, ERFA raised that State aid for rolling stock and Restructuring or Rescuing of Rail Freight Undertakings can both greatly undermine competition.

On 22 June, as the Commission was closing a public consultation on the topic, ERFA highlighted the need for an ambition legislative approach on **international capacity management**, built along the provisions with Timetabling and Capacity Redesign (TTR), whose primary principles must be enshrined in legislation. A clear legal framework on capacity rights in the event of a disturbance or works is also an essential piece to allow rail freight to reach its growth targets set for 2030 and 2050.

On 30 September, ERFA published its position paper on the revision of the **Train Drivers Directive** (TDD). The document raised that train driver certification must ensure a high level of safety of operations whilst also introducing greater flexibility on languages requirements, as to ensure that the later does not become a bottleneck to the good functioning of the European rail freight market.





# Press Releases



Find all our press releases on:  
[www.erfarail.eu/news-events/press-releases](http://www.erfarail.eu/news-events/press-releases)



# ERFA Strategy in a nutshell

## BASIC OBJECTIVES

We aim at solid financials based on satisfaction and involvement of members

## OFFER FOR MEMBERS AND STAKEHOLDERS

We actively support the political processes aimed at railway liberalization

We contribute to the technical and administrative development of railways

## OUR OPERATIONAL FOCUS

We follow political dossiers which are crucial for rail market opening

We cover technical dossiers which are cost- and discrimination-sensitive

## OUR FUTURE CHALLENGES

We are a strong voice for a full market opening and promoting a competitive rail freight sector

**We want to achieve adequate framework conditions for a competitive railway sector**

**We seek opportunities in the field of EU funding**

**We help our members to represent their interest in Brussels' politics**

**We manage relationships with internal and external stakeholders efficiently**

**We assure strong visibility to our positions**

**We want to acquire new members in order to strengthen our position**

# JOIN US!

ERFA represents the interests of private and independent rail freight companies active throughout the European Union. ERFA aims to achieve the best conditions for a competitive railway sector. Creating a more business-friendly environment and customer-orientation is key to rail's development. Our mission is to promote rail transport as a first and viable choice for customers and to ensure full market opening of rail freight across all of Europe.

ERFA's objective is to represent the voice of private and independent rail freight companies in Europe. We support the EU decision-making process with a focus on policy and technical affairs. Our focus is on generating growth for demand in rail services and shifting more goods onto eco-friendly rail.

## ERFA MEMBERSHIP BENEFITS:

A strong voice for fair competition on the European Rail Freight market

Insight and in-depth analysis of the European legislative landscape affecting your daily business

Access to multiple working groups shaping the railway system of tomorrow

Exchange with likeminded rail freight companies striving for a competitive rail freight market in Europe

Working together to promote the specific interests of private and independent rail freight companies

ERFA membership is open to all private and independent operators, regardless of size or business activity. ERFA membership is open to both individual companies and/or national and regional associations.



# ERFA

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ERFA,  
THE VOICE OF THE INDEPENDENTS  
ON THE RAIL FREIGHT MARKET.