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STUDY OF THE SITUATION OF THE RAILWAYS IN MEMBER COUNTRIES

Addendum 1

Transmitted by the Governments of Belgium, Luxembourg, Portugal and Switzerland

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BELGIUM(a) Data on past and future developments of rail passenger and goods traffic:

Rail traffic of passengers and goods in complete wagon loads has developed in recent years as follows:

	Domestic passengers (in millions of passenger-km)	International passengers (in millions of passenger-km)	Complete wagon loads(in millions of t-km)	ABX transport (in millions of consignments)
1996	5 679	1 109	7 244	5 584
1997	5 837	1 147	7 465	6 605
1998	5 830	1 267	7 600	7 374
1999	6 033	1 321	7 392	7 691
2000	6 317	1 437	7 674	8 270
Difference 00/99	+ 4.71 %	+ 8.78 %	+ 3.81 %	+ 7.53 %

In domestic services, the clearly positive results of the last two years compared with previous years show, *inter alia*, that the new transport plan which came into force in May 1998 constitutes a response to increasing public demand. Essentially, the increase in traffic is among passengers holding tickets and “passes” (inclusive tariffs).

The new investment plan 2001-2012 is concerned with giving the railways an essential role in implementing a mobility policy, constituting a vital component of sustainable development, ensuring in the long term increased and collectively efficient mobility and accessibility and also including the objectives of economic growth and the protection of our environment. This new twelve-year plan makes provision for capacity-extending investments which should make it possible to deal with the anticipated growth of traffic and at the same time resolve the problems of saturation of existing infrastructures.

In view of the favourable results in domestic traffic and the prospects of purchasing rolling stock and developing infrastructures, an overall increase of 30% of passenger-km by 2010 (excluding growth due to the RER) seems feasible.

In 2000, 60% of international traffic expressed in passenger-km was covered by high-speed trains (Thalys, Eurostar and the Brussels-France TGV). Conventional international traffic and Eurostar traffic grew by approximately 11% over 1999; growth in Thalys traffic was 7% and in Brussels-France TGV traffic 3%.

Goods traffic in complete wagon loads in 2000 followed the overall development of the economic situation with clear growth in the first half of the year and a gradual slowing of growth in the second half. Intermodal traffic (containers and rail-road), which accounts for 30% of the t-km carried, grew by over 6%. Light industry traffic, with 20% of the t-km carried, increased by around 7%. Heavy industry traffic grew by only 1%.

As regards potential international markets, ports constitute the main generators of transport offers. In 1998, rail traffic to and from the ports accounted for a total of 35.9 million tonnes, or 59% of SCNB's total tonnage. Antwerp alone provided 43% of all SCNB transport.

While it is clear that in the future the ports will continue to be the most fruitful sources for the carriage of rail freight, it is expected that the centre of the network will to a large extent shift towards the port of Antwerp, where a tonnage growth of 63.2% is forecast for 2010.

Continuing the upwards trend observed in recent years, the year 2000 witnessed a growth in the number of consignments in SNCB (ABX) parcels traffic of around 7.5%.

(b) New developments to be observed subsequent to the reorganization of the rail sector with special attention to the setting-up of new railway companies:

In November 1999, the SNCB obtained its railway company licence for the following types of services:

- international carriage of passengers - high-speed lines;
- international carriage of passengers - conventional rail;
- international carriage of goods;
- international combined transport of goods.

In February 2001, the SNCB also received a safety certificate referring to the same types of services and valid on all lines of the Belgian railway network.

A second licence was awarded in September 2000 to the B.V.B.A.D&L Cargo for the following types of service:

- international carriage of goods;
- international combined transport of goods.

A third application for a licence, currently being examined, was submitted by Intercontainer Interfrigo s.c. (ICF) in April 2001.

(c) Investments in (i) rail infrastructure and (ii) railway rolling stock:

The investments made over the last three years, expressed in billions of BFB are included in the table below where a distinction is made between investments concerning the TGV and those concerning the domestic network.

	1998	1999	2000
Conventional	36.8	37.8	37.0
Infrastructure	16.4	19.0	25.8
Rolling stock	16.2	16.7	9.5
Other	4.2	2.1	1.7
TGV	9.3	11.9	15.0
Infrastructure	9.3	11.8	15.0
Rolling stock	-	0.1	-
TOTAL	46.1	49.8	52.0
SCNB financing	37.5%	36.8%	47.6%

Slight progress can be seen in TGV investments although investments in the domestic network remained at the same level.

The last line of the table gives the share of total investments covered by the SNCB (own funds and Financière TGV); the rest of the financing of these investments is basically covered by the Ministry for Communications and Infrastructure, while less than 2% is covered by third parties (provinces, communes, public works ...).

LUXEMBOURG(a) Data on past and future developments of rail passenger and goods traffic:

The attractive economic situation of the Grand Duchy generates growing numbers of jobs which, despite the constant growth of the population, can not be filled by resident workers. This means that there is very considerable growth of cross-border movements and the number of cross-border workers can be seen to be increasing faster than that of resident workers. The concentration of economic activities in the capital and its environs is leading to increased congestion of the road network. This encourages the development of passenger transport by rail and the statistics given in the table "Development of the public passenger service (domestic and cross-border)" show an increase in the number of passengers carried. A research consultancy external to the CFL has analysed the situation in the Grand Duchy and anticipates a 50% increase in numbers of rail passengers by 2020.

The favourable economic situation of 2000 showed an increase in the tonnage carried by rail to 20 million tonnes. The table on the development of goods traffic shows that the result is close to the maximum tonnages achieved during the boom period of the early 1970s. It can be seen that the increase in combined transport is greater than that of conventional transport. Between 1996 and 2000, this share grew from 17% to 22.3%. Since Luxembourg has very considerable volumes of transit traffic, it may be estimated that this development follows the European development of combined traffic. For the transport of goods in general, a CFL, SNCB and SNCF-RFF group of experts has estimated the increase in goods traffic in transit through the Grand Duchy of Luxembourg at approximately 60% by 2020.

(b) New developments to be observed subsequent to the reorganization of the rail sector, with special attention to the setting-up of new railway companies:

Luxembourg has laws concerning the railway licence and the safety certificate in implementation of the European Directives. No new railway companies were established in 2000.

(c) Investment in (i) rail infrastructure and (ii) railway rolling stock:

The following table sets out the investments scheduled in Luxembourg's railway infrastructure.

The CFL have brought into service a fleet of 20 dual-voltage locomotives 25kV AC and 3kV DC and six X73500 railcars; the delivery of the latter is in progress. In coming years, the CFL will invest in motor-driven equipment, enabling the growing number of passengers to be absorbed. Investment is also planned in high and medium-power diesel locomotives. The CFL have also taken steps to purchase various types of wagons to replace rolling stock which has reached its age limit and to meet the demand for rolling stock better adapted to the needs of its customers, and will continue to do so.

Study of the situation of the railways in member countries

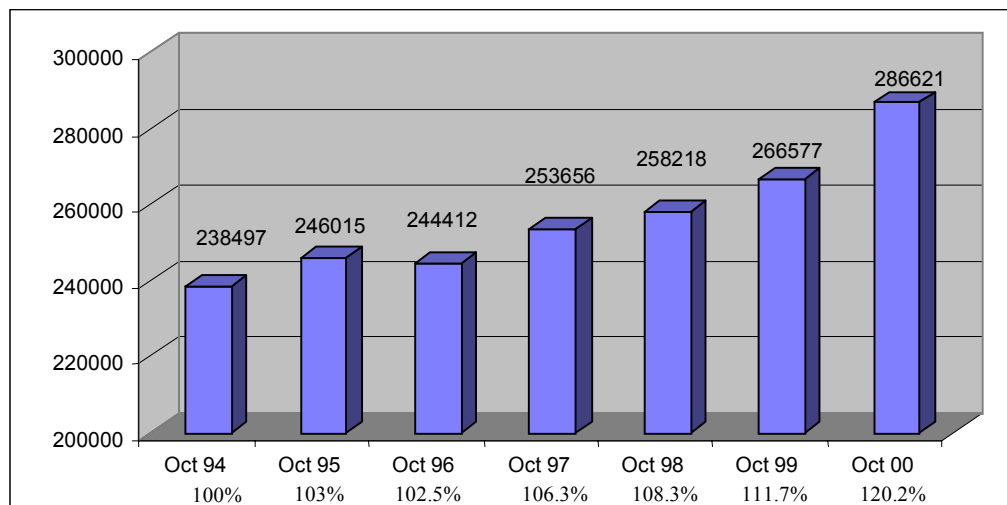
The following investments were scheduled under the act of 24 July 2000

Project	Text	Amount in Lux F
1a	Zoufftgen-Luxembourg line. Total renovation of existing tracks between Bettembourg/border and Luxembourg.	505 000 000.-
1b	Zoufftgen-Luxembourg line. Planning of a third line in the Fentange triangle, increase of line capacity by optimizing section blocks, integration of the Berchem signal box into the Luxembourg master signal box.	546 000 000.-
2	Partial doubling of the track on the Pétange-Luxembourg and the Pétange-Rodange/border lines and renovation and modernization of the fixed installations on those lines, particularly in the sectors of Pétange and Rodange stations.	1 992 547 000.-
3	Complete renovation of the track and infrastructures on the Luxembourg-Gouvy line, known as the "Northern Line," particularly the Walferdange-Lorentzweiler section of track and increase of line capacity.	584 834 000.-
4	Renovation of the track, switch gear and master signal box in Wasserbillig station.	828 500 000.-
5	Renovation and modernization of the fixed installations on the Noertzange-Rumelange and Tétange-Langengrund lines, particularly in the sectors of the stations.	322 684 000.-
6	Esch/Alzette station. Modernization and renovation of fixed installations; final situation.	894 000 000.-
7	Creation of storage sidings for rolling stock in Luxembourg station.	1 000 000 000.-
8	Tripling of the "Pulvermühle" viaduct line in Luxembourg station.	1 000 000 000.-
9	Installation of an automatic train-stopping device and of a speed monitoring system throughout the network.	995 000 000.-
10	Building new passenger platforms.	400 000 000.-
11	Supply of electric traction power to the Luxembourg rail network with a view to traffic at the start of the twenty-first century.	1 416 011 000.-
12	Renovation and suppression of level crossings throughout the network.	498 000,000.-
13	Modernization and renovation of the Luxembourg-Kleinbettingen line.	900 000 000.-
14	Renovation of the track and switch gear, laying down of new tracks and new tertiary switch gear and installation of special anti-lubrication bearings in the points of the switch gear.	350 000 000.-
	TOTAL	LUX F 12,232,576,000.- € 303,237,638.17

Development of freight traffic 1972-2000

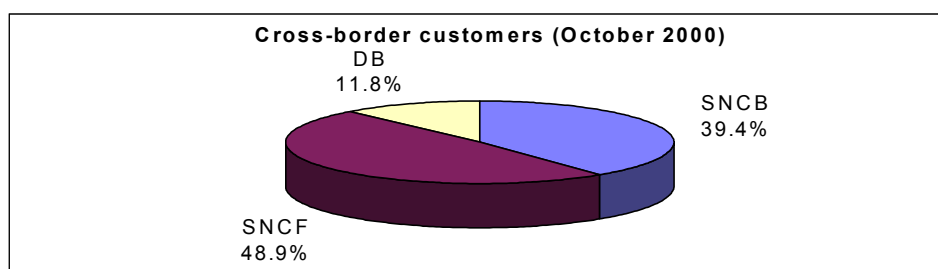
1972	21,958
1973	22,534
1974	23,098
1975	16,828
1976	15,681
1977	14,394
1978	15,669
1979	18,736
1980	17,401
1981	15,151
1982	13,802
1983	12,976
1984	15,581
1985	16,743
1986	15,656
1987	14,801
1988	16,587
1989	17,874
1990	17,586
1991	17,376
1992	16,826
1993	17,365
1994	19,213
1995	16,582
1996	16,500
1997	17,701
1998	18,237
1999	19,300
2000	20,000

Development of the passenger public service (domestic and cross-border)



The railways are currently experiencing a considerable increase in the number of journeys in general. The annual average variation was +2.9% between 1994 and 2000 with a peak of +7.5% between 1999 and 2000.

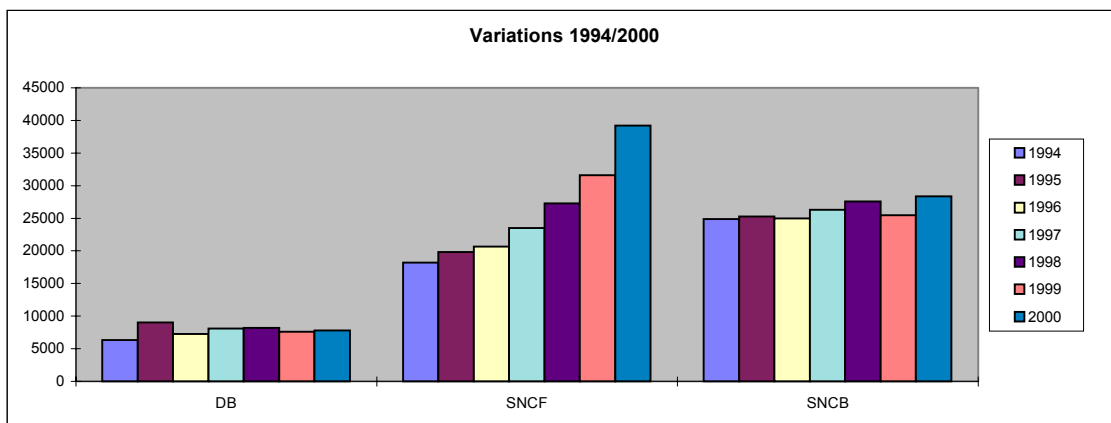
Breakdown of cross-border passenger public service



(Source: CFL)

The quota of cross-border customers from France, which is already nearly 50%, is likely to increase further with the improvement of the offer, as shown in the following chart of traffic growth.

Development of the cross-border passenger public service



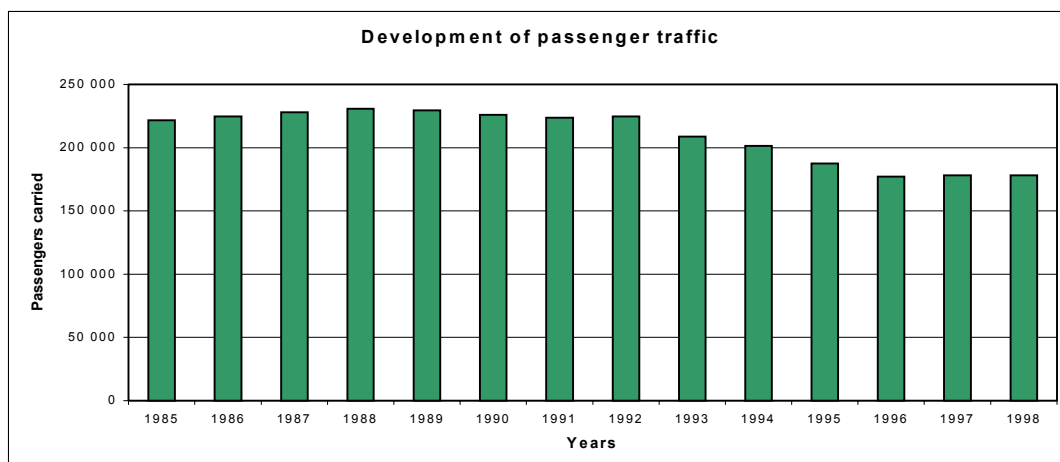
The increase in cross-border traffic is proportionally greater than the total increase in travel. The annual average was +7.5% between 1994 and 2000 with a peak of +16.5% between 1999 and 2000.

PORTUGAL

(a) Data on past and future developments of rail passenger and goods traffic:

Figures 1, 2, 3 and 4 and Tables 1 and 2 below show developments in rail passenger and goods traffic.

Figure 1: Development of passenger traffic - passengers carried



Source: Transport and Communications Statistics - INE.

Unit: 10³.

Figure 2: Development of passenger traffic - passenger-km

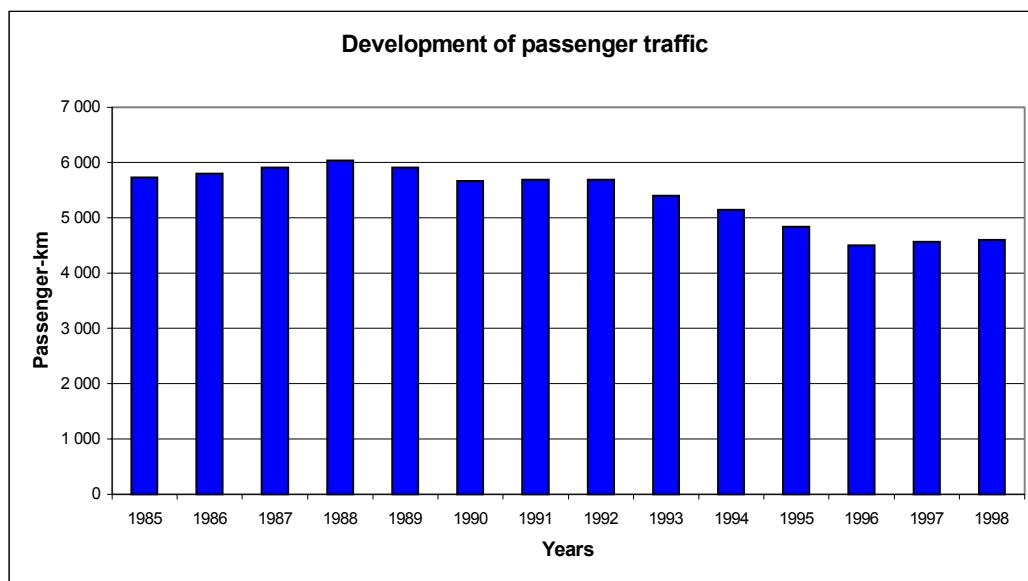
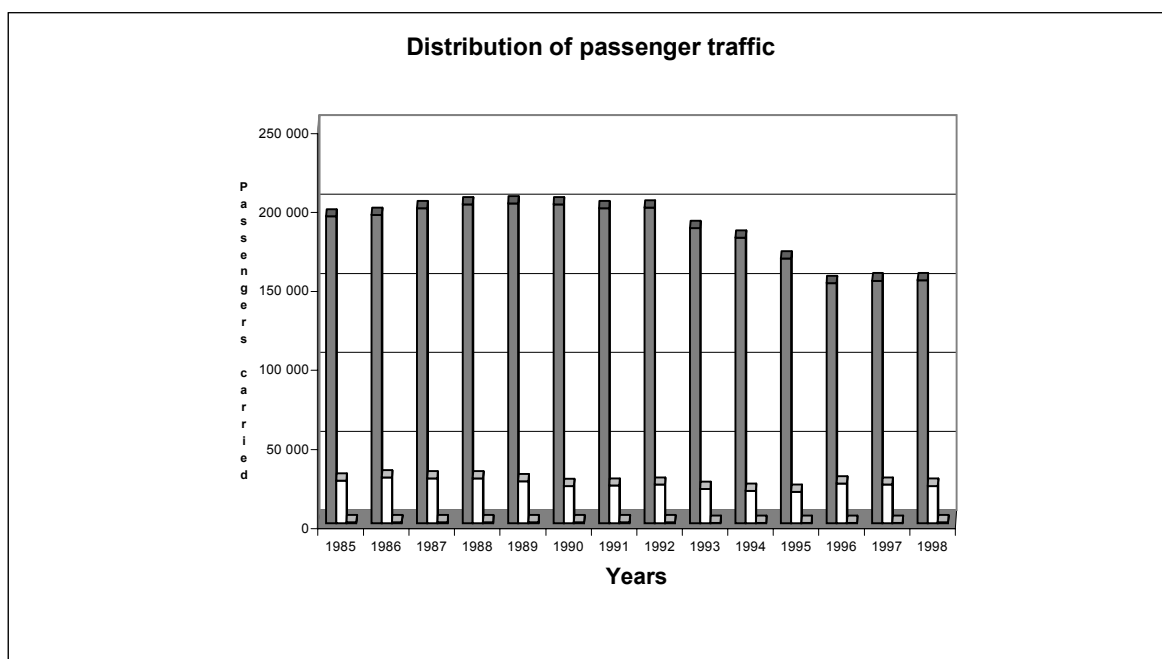


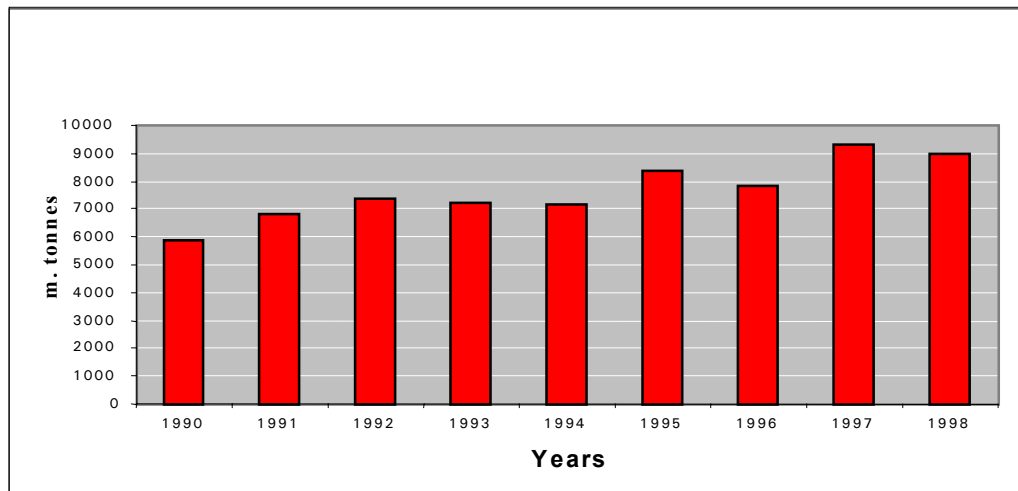
Figure 3: Distribution of passenger traffic



Source: Transport and Communications Statistics - INE.

Unit: 10³.

Figure 4: Development of domestic and international goods traffic



Source: UTML, CPEP.
Unit: tonnes carried 10^3 .

Table 1: Passenger traffic 1985-1998

Traffic type and indicators	Unit.	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998
TOTAL															
Passengers carried	10 ³	221 517	224 479	227 996	230 728	229 430	225 882	223 631	224 621	208 588	201 356	187 533	177 094	178 130	177 965
Passenger-km.	10 ⁶	5 726	5 803	5 907	6 036	5 908	5 664	5 692	5 694	5 397	5 149	4 840	4 503	4 563	4 602
SUBURBAN TRAFFIC															
Passengers carried	10 ³	194 022	195 034	199 218	201 704	202 261	201 831	199 324	199 665	186 739	180 631	167 482	151 778	153 485	153 675
Passenger-km.	10 ⁶	3 375	3 391	3 424	3 490	3 509	3 493	3 480	3 499	3 354	3 147	2 952	2 689	2 731	2 706
LONG-HAUL TRAFFIC															
Passengers carried	10 ³	26 993	28 922	28 300	28 530	26 686	23 509	23 733	24 470	21 511	20 471	19 875	25 136	24 447	23 648
Passenger-km.	10 ⁶	2 248	2 305	2 389	2 445	2 303	2 067	2 094	2 076	1 958	1 892	1 812	1 745	1 757	1 815
INTERNATIONAL TRAFFIC															
Passengers carried	10 ³	502	523	478	494	483	542	574	486	338	254	176	180	198	642
Passenger-km.	10 ⁶	102	107	94	101	96	104	118	119	85	110	75	69	75	81

Source: Transport and Communications Statistics - INE.

Table 2: Goods traffic 1990-1998

	1990	1991	1992	1993	1994	1995	1996	1997	1998
Full wagon load and block train	5 892	6 839	7 398	7 231	7 139	8 406	7 867	9 308	8 966
Emergency volumes	10	11	-	-	-	-	-	-	-
Retail and others	43	39	30	-	-	-	-	-	-
Total	5 945	6 889	7 428	7 231	7 139	8 406	7 867	9 308	8 966

Source: UTMI, CP E.P.

Unit: Tonnes carried, 10³.

- (b) New developments to be observed subsequent to the reorganization of the rail sector, with special attention to the setting-up of new railway companies:

In Portugal, a **legal and institutional restructuring** of the railway sector is in progress along the lines proposed by the reform of Community legislation. The following stages may be noted:

- (i) **separation of rail infrastructure management activities and the provision of transport services** within this infrastructure through the creation of the National Railway Network, REFER, E.P., in 1997;
- (ii) **establishment of a body with responsibilities in the regulation, supervision and development of the sector** - National Rail Transport Institute (INTF), in 1998;
- (iii) **concession of the suburban transport service on the north-south route** to a private operator - FERTAGUS, in 1999;
- (iv) **establishment of RAVE S.A.** - High-Speed Rail Network, S.A. in 2000, with responsibility for preparing the decision to set up a high-speed network.

The vertical breakdown of infrastructure management activities and rail transport service operation creates a market for infrastructure management and the allocation of its capacity. The structure of this market must necessarily be monopolistic, under a single managing body - REFER - the stimulus depending on the introduction of competitors into the operation of transport services and on the definition of regulatory machinery suitable for monitoring the prices applied by the infrastructure manager and for the taxation of performance.

- (c) Investments in (i) infrastructure and (ii) railway rolling stock

Table 3 sums up investments in rolling stock by the CP operator alone, between 1995 and 1998.

Table 3: Investment in rolling stock

TYPES OF INVESTMENT	1995	1996	1997	1998
Traction	3 357	320	324	275
Passenger transport	7 274	16 363	12 722	13 078
Goods transport	2	103	587	
Other	1 845	2 122	1 142	4 170
TOTAL	12 479	18 908	14 774	17 522

Source: Transport and Communications Statistics - INE.

Unit: 106 escudos

Tables 4 and 5 show the investment in infrastructure for the period 1995-2000, with values at current prices. For 1999 and 2000 investment can be shown by specialization (table 5).

Table 4: Investment in infrastructure

Year	Investment
1995	37 836
1996	52 125*
1997	95 523**
1998	107 468
1999	68 559
2000	80 473

Source: CP E.P. and REFER E.P.
Unit: Thousands of contos

* Includes investment by the Lisbon and Porto Rail Hubs.

** Includes investment by REFER (62,996 million contos), by the Rail Hubs Offices of Lisbon and Porto and the office for the management of railway construction on the 25 April Bridge (15,143 thousand contos) and by the CP (17,384 thousand contos).

Table 5: Investment in infrastructure by specialization

SPECIALIZATION - TYPE OF INVESTMENT	1999	2000
Catenary	3 124 823 466	2 922 811 047
Civil engineering and structures	7 015 104 696	15 885 015 692
Other buildings and constructions	1 265 434 194	3 154 025 363
Stations	12 150 869 988	6 016 817 745
Supply lines	1 064 887 494	74 021 816
Level crossings	1 473 113 564	2 322 421 200
Signals	9 430 256 691	6 922 896 845
Power sub-stations	1 215 735 054	600 989 939
Telecommunications	2 599 774 805	2 495 371 545
Land	3 448 041 433	5 481 357 835
Track	16 448 864 672	20 508 642 150
Other	9 322 928 687	14 089 601 397
Total investment	68 559 834 744	80 473 972 574

Source: REFER E.P.
Unit: Contos

SWITZERLAND

(a) Data on past and future developments of rail passenger and goods traffic:

The goal Switzerland has set itself is to modify the modal split, both in passenger and goods transport, in favour of the railways. In order to make public transport more attractive, Switzerland has decided on a series of measures with a view to modernizing the infrastructure (Rail 2000, New Alpine rail axes, link to the European high-speed network). The Confederation and the cantons are furthermore taking responsibility for uncovered costs in regional traffic, thus enabling public transport to provide good services. This policy of promoting public transport has led to the following results:

Passenger transport:

1997: 16,237 million passenger-kilometres
1998 : 16,373 million passenger-kilometres
1999 : 16,481 million passenger-kilometres

Transport of goods:

1997: 8,688 million tonne-kilometres
1998: 9,060 million tonne-kilometres
1999: 9,847 million tonne-kilometres

(b) New developments to be observed subsequent to the reorganization of the rail sector, with special attention to the setting-up of new railway companies:

The first stage of the reform of the railways came into force on 1 January 1999. This has made it possible to incorporate EU Directive 91/440.

The strategic goals are to improve the productivity and efficiency of public transport, including rail traffic, and the cost-benefit ratio for the public authorities.

The reform of the railways has led to the following measures:

- debt-reduction and conversion of the Federal Railways (CFF) into a public limited company;
- introduction of free access to the network in goods traffic. The high level of service in the carriage of passengers is for its part protected through concessions. It is, however, possible to open concessions to competition;
- introduction of a separation between the infrastructure and transport in terms of book-keeping and organization.

An independent arbitration commission decides in the event of disputes concerning access to the network or the price of the train-path.

Twenty-two companies currently hold a right of access to the network.

Work on the second stage of the reform of the railways has already begun. The strong point will be the harmonization of the infrastructure with the CFF and private railway companies. Another area for discussion will be the relations of ownership between the Confederation and the cantons in respect of public transport companies.

There has been no increase in the number of railway companies since Switzerland already has a large number of private independent companies. The reform of the railways has enabled a number of these to expand their area of activity.

(c) Investments in:

(i) rail infrastructure:

1997: 2,460.2 million francs

1998 : 2,408.6 million francs

1999 : 2,566.4 million francs

(ii) rolling stock:

Budget Mittelfristplan 2000-2003.
