

**UNECE**

# **Railway Reform in the ECE region**



**UNITED NATIONS**



# RAILWAY REFORM IN THE ECE REGION

Final report



UNITED NATIONS  
New York and Geneva, 2018

# Note

The designations employed and the presentation of the material in this publication do not imply the expression of any opinion whatsoever on the part of the Secretariat of the United Nations concerning the legal status of any country, territory, city or area, or of its authorities, or concerning the delimitation of its frontiers or boundaries.

ECE/TRANS/261

Copyright © United Nations, 2017

*All rights reserved.*

*No part of this publication may, for sales purposes, be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, electrostatic, magnetic tape, mechanical, photocopying or otherwise, without prior permission in writing from the United Nations.*

UNITED NATIONS PUBLICATION

eISBN: 978-92-1-363117-1

# ACKNOWLEDGMENTS

The Study on Railway Reform across the ECE region was prepared by the consultant **Davide Ranghetti**.

It is based on desktop research and thanks to the kind contribution of speakers and delegates at the Workshop on Railway Reform held in conjunction with the seventy-first session of the Working Party on Rail Transport in November 2017, as well as speakers at previous session of SC.2, without whose commitment and input to this study would not have been possible.

The United Nations Economic Commission for Europe, as well as other experts also provided valuable input into the preparation of the document.

## Disclaimer:

Views expressed in this document are of the consultant and of the participants of the Workshop on Railway Reform in the ECE region held in conjunction with the seventy-first session of the Working Party on Rail Transport. They should not be considered as the views of UNECE or as binding on any United Nations entity.

# CONTENTS

Executive Summary .....	vi
<i>Introduction</i> .....	vi
<i>History of railway reform</i> .....	vi
<i>Railway reform implementation</i> .....	vii
<i>Conclusions</i> .....	ix
List of Abbreviations .....	x
Introduction .....	1
History of Railway Reform .....	3
Background and Introduction .....	3
History of Railway Reform in the European Union .....	5
Initial reform attempts .....	7
The First Railway Package .....	7
The Second Railway Package .....	8
The Third Railway Package .....	9
Recast of the First Railway Package and the Fourth Railway Package .....	9
History of Rail Reform in other UNECE countries .....	11
Switzerland .....	12
Norway .....	12
SEETO countries .....	13
Turkey .....	14
Russian Federation .....	15
Kazakhstan .....	17
Ukraine .....	18
Uzbekistan .....	18
Other former republics of the Soviet Union .....	19
Rail Reform implementation .....	20
Transposition of EU legislation .....	20
The role of rail regulators within the EU .....	23
Rail reform implementation indexes .....	28

Separation of the rail incumbent .....	30
Separation arrangements in EU Member States.....	32
Separation arrangements in Non-EU countries .....	35
Market opening.....	38
Access models .....	39
New entrants in the freight and passenger markets .....	40
Market access arrangements in EU Member States .....	43
Market access arrangements in non-EU countries .....	46
Interoperability and technical harmonization.....	49
Effects of reform on railway performance .....	51
Rail reform implications on cost and efficiency measures.....	51
Effects of rail reform on prices, customer satisfaction and quality .....	53
Modal share of passenger rail transport.....	54
Conclusions.....	56
Annexes .....	57
Annex 1. Statistical database .....	57
Annex 2. The Tunisian railway reform.....	63
Bibliography.....	65

# EXECUTIVE SUMMARY

## **INTRODUCTION**

As part of the ongoing work of the Working Party on Rail Transport (SC.2), the seventy-first session of SC.2 hosted the Workshop on Railway Reform across the ECE region attended by member States, intergovernmental organizations (IGOs), non-governmental organizations (NGOs) and the private sector. As an output to this workshop, this study has been prepared to summarise railway reform across the region.

## **HISTORY OF RAILWAY REFORM**

When looking to the **European Union Member States** (EU Member States), the paper outlines the evolution of EU rail legislation with respect to three major areas, namely separation of infrastructure management and service operations; market opening and liberalization of the rail services; and promotion of interoperability and technical harmonization to encourage the development of an integrated rail system leading to a single European rail area. The EU approach to reform has been based on the idea that greater competition makes for a more efficient and customer-responsive industry.

In the early stages of reform, rail proved to be reluctant to pursue liberalization, especially when compared to other modes of transport. Directive 91/440/EC — that is the first important measure of the European Commission concerning the rail sector — had little impact, as was shown by the small number of new operators or services being added to the market. In the following years, the four regulatory “**Railway Packages**” that had been approved in 2001, 2004, 2007 and 2016, were aimed at countering this lack of progress. The packages consecutively brought together previous Directives, updated them, and facilitated market development.

The **Fourth Railway Package** — which includes a “Technical Pillar” for rail safety and interoperability, and a “Market pillar” for the governance of railways and the opening of the passenger market — was proposed by the European Commission in 2013, and was originally intended to remove all remaining legal, institutional and technical obstacles to create a single European Railway Area.

预览已结束，完整报告链接和二维码如下：

[https://www.yunbaogao.cn/report/index/report?reportId=5\\_1367](https://www.yunbaogao.cn/report/index/report?reportId=5_1367)

