

Transport Community Secretariat

14th Technical Committee on Railway

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About UNIFE

- ▶ Established in Brussels since 1992
- ▶ More than 100 Member companies (1/3 are SMEs) and 13 National Associations
- ▶ 400.000 jobs in Europe
- ▶ Global leaders: UNIFE members represent 84% of European market and 46% of world rail market
- ▶ Visit www.unife.org to discover UNIFE Membership benefits



About UNIFE

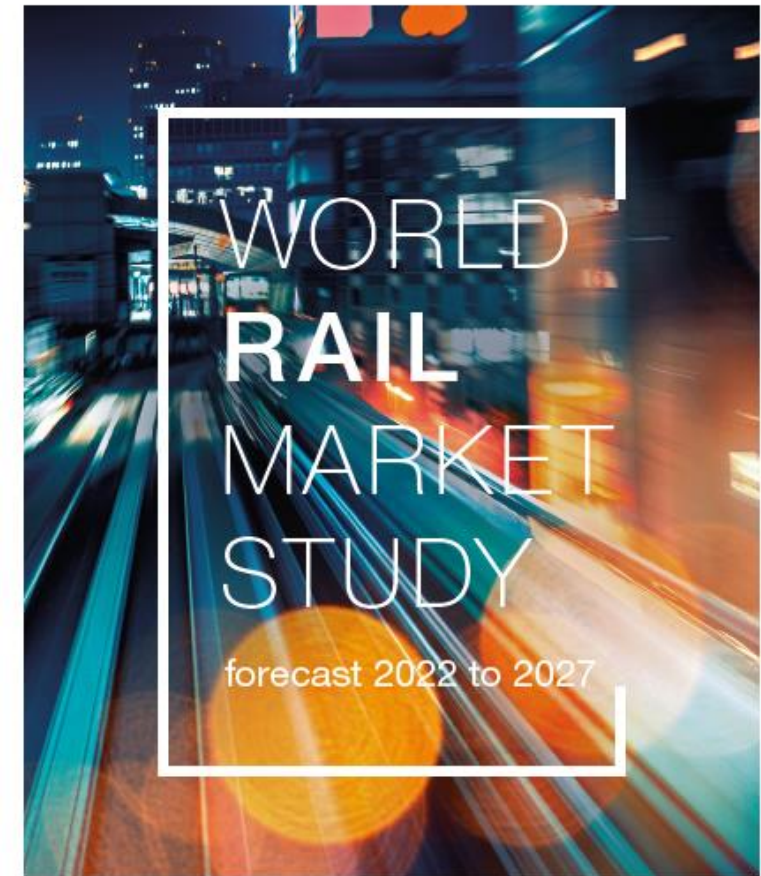


Global market rail projections

- ▶ Global world rail supply market expected to **grow at 3% CAGR until 2027** [from current €177 bn to €210 bn]
- ▶ **Eastern Europe and Africa Middle/East** are expected to show strongest growth rates [at **6.1% and 7.1%** respectively]
- ▶ **Infrastructure** is the segment to yield strongest growth at **3.8%**

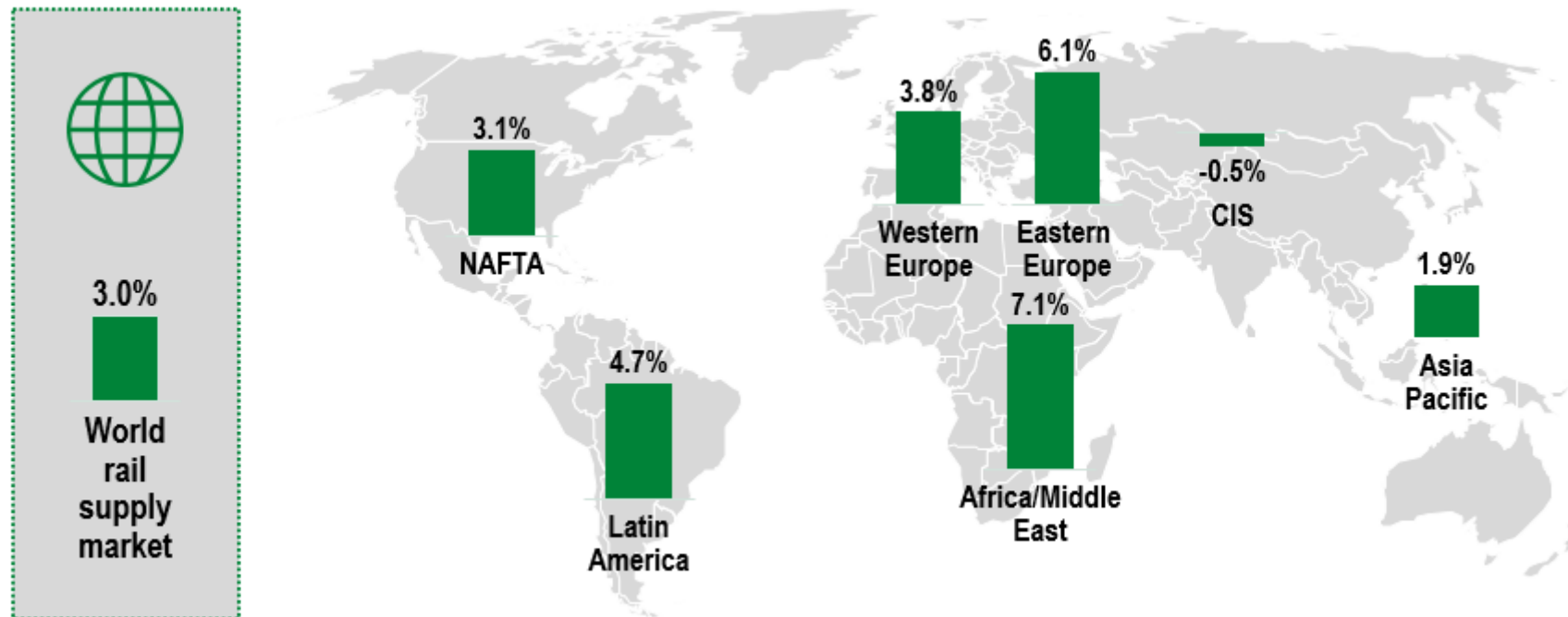
Commissioned by
unife
THE EUROPEAN RAIL INDUSTRY

Conducted by
Roland
Berger



Key findings of the WRMS 2022 – Future market

- ▶ Eastern Europe and Africa Middle/East are expected to show strongest growth rates; CIS only region with declining market
- ▶ Total market growth rates per region [CAGR1), %]



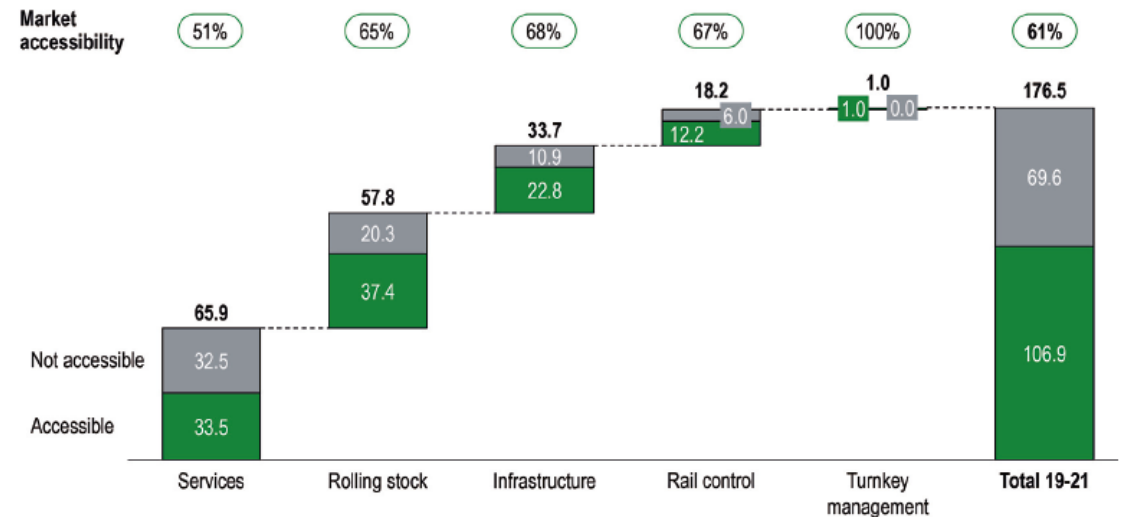
1) Compound annual growth rate 2025-2027 vs. 2019-2021

Market accessibility remains an obstacle

Worldwide market accessibility continues to decrease – strong political action is needed!

- ▶ Reduced accessibility and visibility of certain markets for European suppliers, while European rail market is being more liberalised and opened to foreign suppliers
- ▶ Higher uncertainty caused by geopolitical conflicts (e.g., US-Iran or Russia-Ukraine)
- ▶ However, proportional growth in accessible markets and upwards adjustments in some countries (e.g., UAE, Israel) partially limit decrease of accessibility rate to a level of around 61% in the current market (2020: 62%)

Total volume of current market amounts to EUR 176.5 bn p.a. – accessible market accounts for 61 % of total



EU Investments in the Western Balkans

Advocating for mobilisation of financing support in a Team Europe approach

- ▶ Global Gateway could provide more focused support on rail projects, including at the urban level
- ▶ Western Balkans Investment Framework to continue support on Flagship corridors initiative with the support of DG NEAR, EIB, EBRD and others EFIs
- ▶ Pre-accession funds to address bottlenecks in the transposition of the acquis [public procurement, administrative capacity, etc].

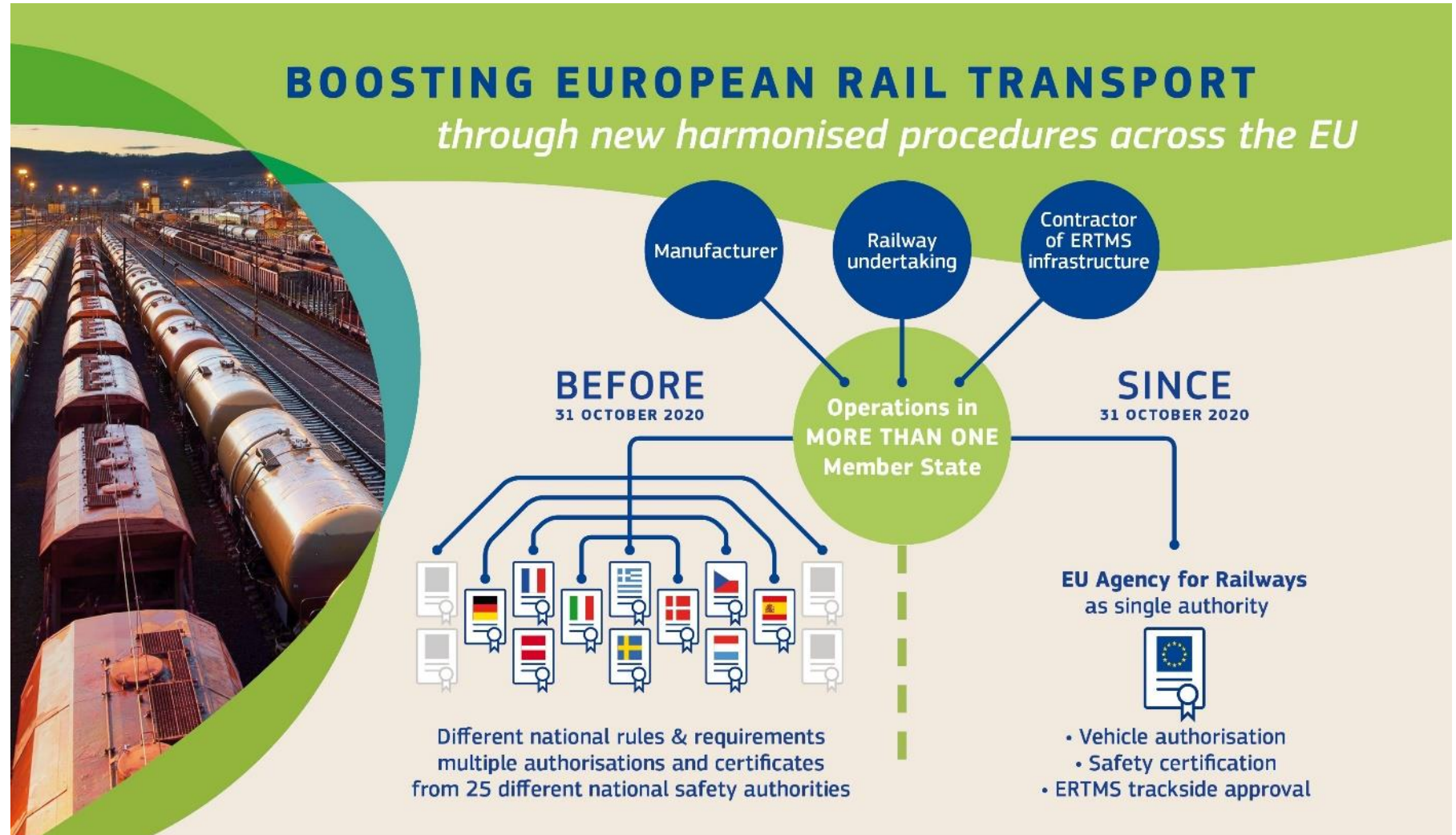
Strategic importance of public procurement for the RSI

The Most Economically Advantageous Tender (MEAT) - A sustainable approach to rail procurement

- ▶ Application of the EU public procurement framework
 - ▶ In particular, it is important to underline the contract award criteria described in **Article 82 of Directive 2014/25/EU** and **Article 67 of Directive 2014/24/EU**: “...**contracting entities shall base the award of contracts on the Most Economically Advantageous Tender**” (“MEAT”); “...shall be identified on the basis of the price or cost, using a cost-effectiveness approach, such as life-cycle costing...”.
- ▶ In practice, contracts can still be awarded on the basis of price only
- ▶ List of potential criteria that could be considered in tendering procedures and contract awarding of rail projects:
 - ▶ Long term strategy, performance, technical criteria, logistical capabilities, life-cycle costing, corporate social responsibility

UNIFE & the 4th Railway Package Technical Pillar

4RP implementation is of paramount importance for the European rail supply industry's future competitiveness and achieving a truly Single European Railway Area



Digitalisation as a key enabler of the RSI



Advantages of **ERTMS/ETCS** and **CBTC** and their impact on safety and efficiency



Deployment of **Digital Automatic Coupling (DAC)** and its impact on rail freight productivity



Introduction of **FRMCS** as the future high-performance mobile network



Overview of **predictive maintenance** and its benefits (e.g., impact on maintenance costs and availability of vehicles)



Seamless multimodal and improved rail transport experience through the **digitalisation of the rail journey**



Overview of regulatory initiatives as a result of increasing number of cyber attacks – **Cyber security** as an emerging field of services

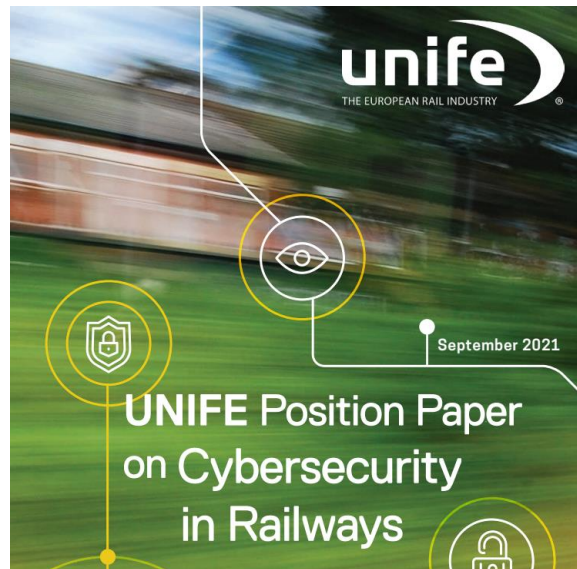
Digitalisation as a key enabler of the RSI

UNIFE involvement on key topics:



2022 DAC Sector Statement

Digital Automatic Coupling - a key element for the digital transformation of the European railway system





See you soon

THANK YOU

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UNIFE - The European Rail
Supply Industry Association

