



# **Current and futur challenges facing railway rolling stock keepers**

Carole Coune, Secretary General of AERRL

RailTech Belgium 2023, 7 June 2023

9 rail rolling stock lessors :



## Catalyst of competition & growth

- Since 2008, making rolling stock available for all interested RUs: mainly locos, but also MDU and coaches
- About 7 % of the European locomotives fleet
- **Leasing = growing business**
  - 2011-2015: 25 % of new loco deliveries**
  - 2016-2020: 40 % of new loco deliveries**

## Investing in interoperability/safety

- Efficient, interoperable and safe rolling stock
- Strong focus on mainline electric locomotives
- 64% of the locomotive leasing fleet is electric traction, 34% diesel traction, with 2% alternative drive.
- 65% is cross border.
- **40% of the locomotive leasing fleet is equipped with ETCS**

## Why ERTMS deployment funding became an enormous challenge for investors ?

- No European digital platform publishing the level of the characteristics, as well as the planning of deployment of the ERTMS on the European network
- Increasing costs => threat for access to rolling stock for all
- Lack of technological stability => increasing risk of obsolescence
- New regulations ignore the real industrial capacity to produce and deliver ETCS BL3 and BL4 in time.

## Our key messages

ERTMS database as tool for investment decision-makers

Sufficient subsidies to support retrofitting

Technological stability

**Circular economy issues**

Strong CBA, taking into account the industrial capabilities

# Initial roadmap for the phasing out of fossil diesel

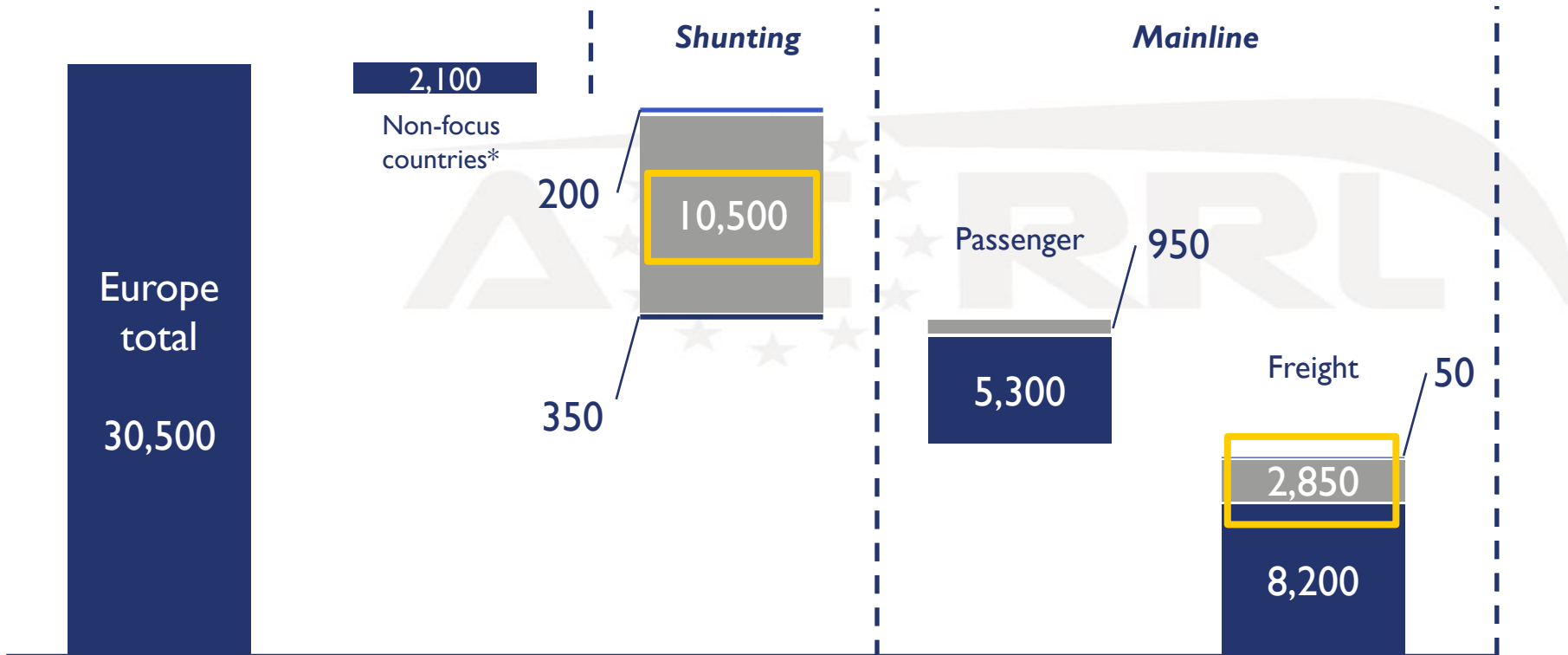


SUPPORTED BY:



## 14.300 DIESEL LOCOMOTIVES IN EU = MORE THAN 50 % OF LOCO RUNNING IN EU AND OPERATED BY EU RAILWAY COMPANIES

Locomotives in Europe in 2020 (30,500 units)  
of which operating in EU member states + CH/NO (28,400 units)

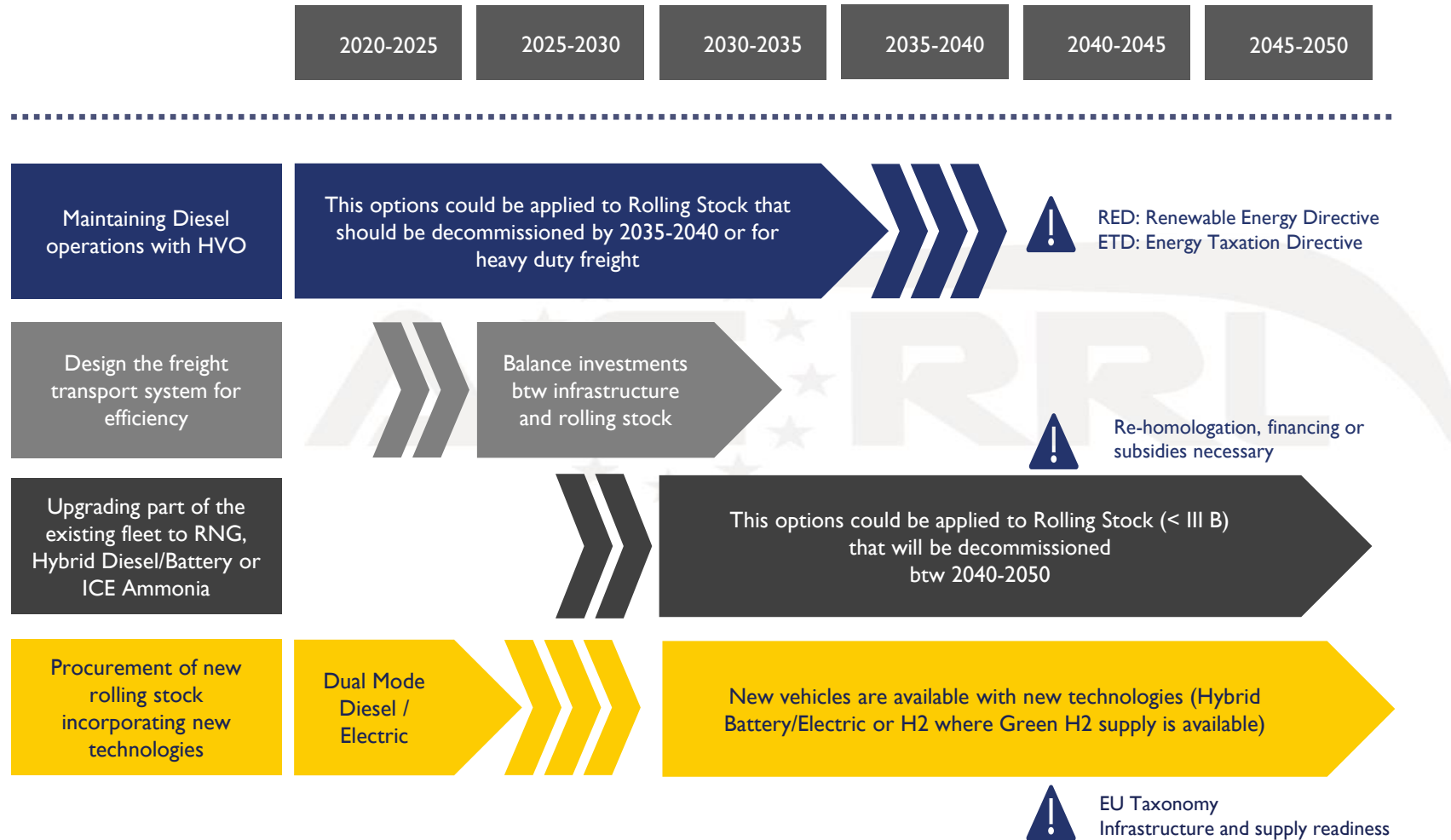


\*non-EU member states, excluding CH/NO

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Source: SCI Verkehr European rolling stock leasing fleet -Market overview for freight and passenger assets, based on the European fleet on 31st December 2020

# OUR INITIAL ROADMAP





## SECOND-GENERATION BIOFUEL

### USES WASTE FROM FOOD INDUSTRY

- Unlike first generations using crops
- 85/90 % less CO<sub>2</sub> emissions
- Ca. 30 % more expensive

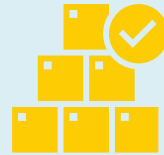


## AERRL PROPOSAL TO PROMOTE HVO USE AT EU LEVEL



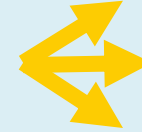
### PRICE

- Lower taxes (ETD Directive)
- Review EU Taxonomy



### SUPPLY

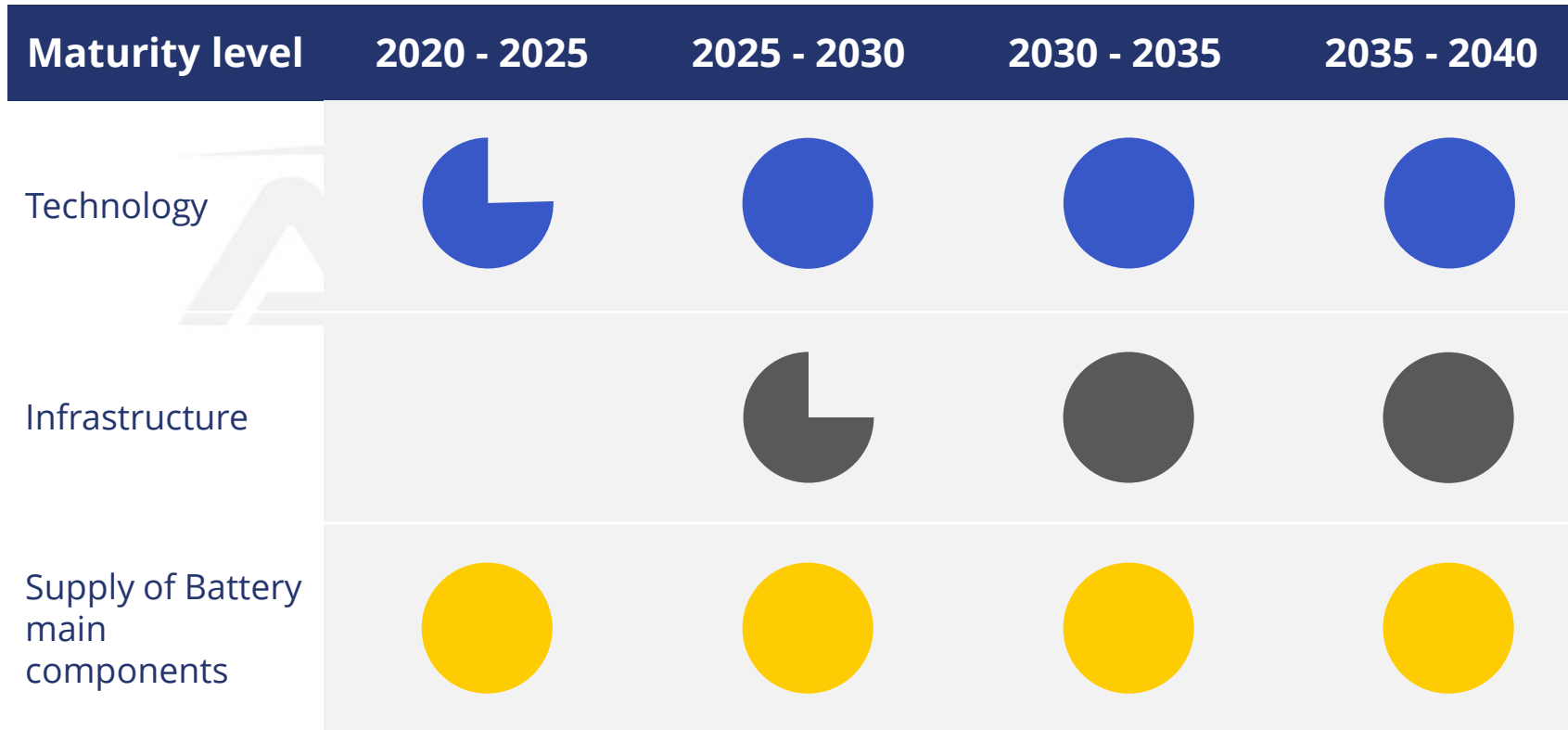
- Increased by Horizon programme subsidies



### DISTRIBUTION

- Facilitation

## TECHNOLOGY, INFRASTRUCTURE AND SUPPLY AVAILABILITY READINESS FOR BATTERY



## HYBRID BATTERY/ELECTRIC



**Potentially a solution for 85 % of diesel locomotives**

Rail &  
electrification  
=  
Winning duo

LET'S DO IT  
TOGETHER

**Next step: discussions, alignment =>  
final sectorial roadmap**