

**Independent Regulators' Group – Rail**

**Annexes to the fourth Annual Market Monitoring Report**

March 2016

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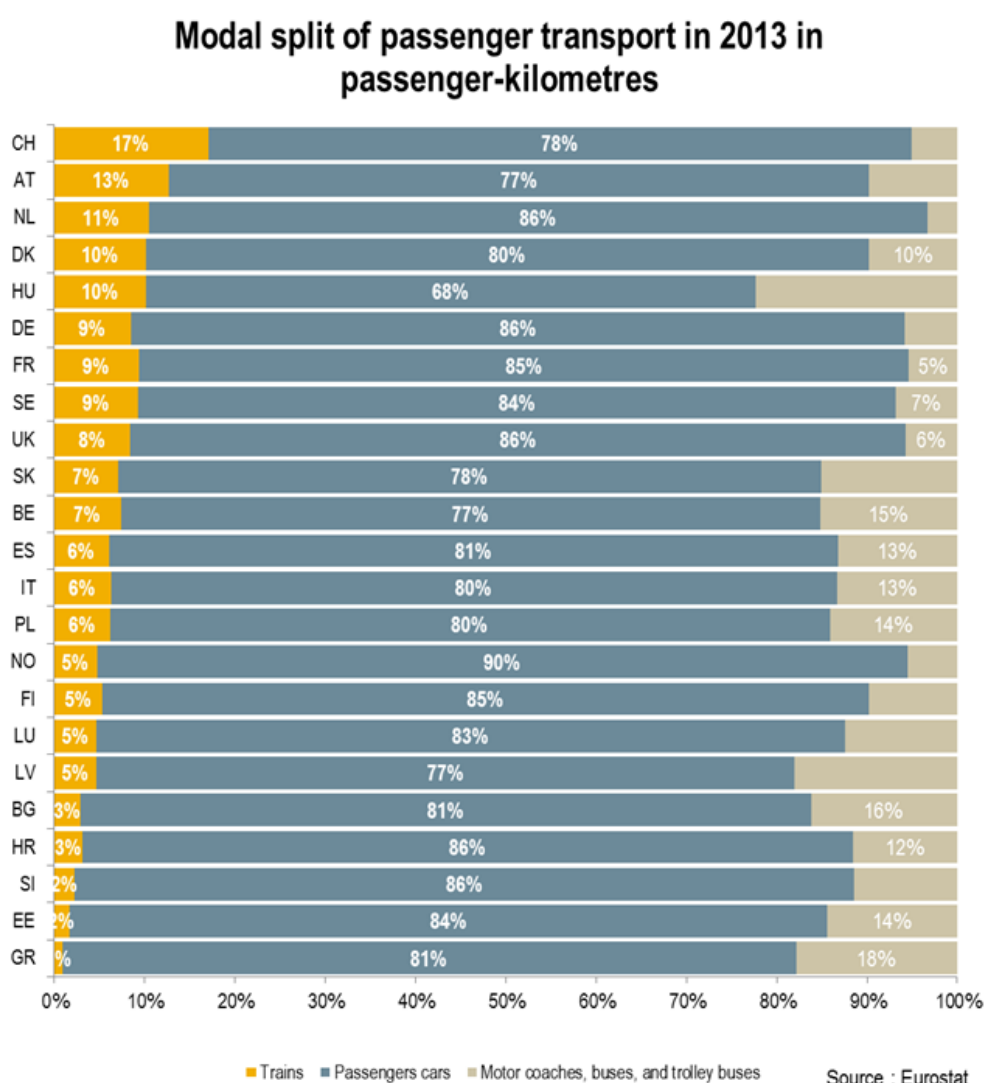
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## 1. Annex 1 – Definitions

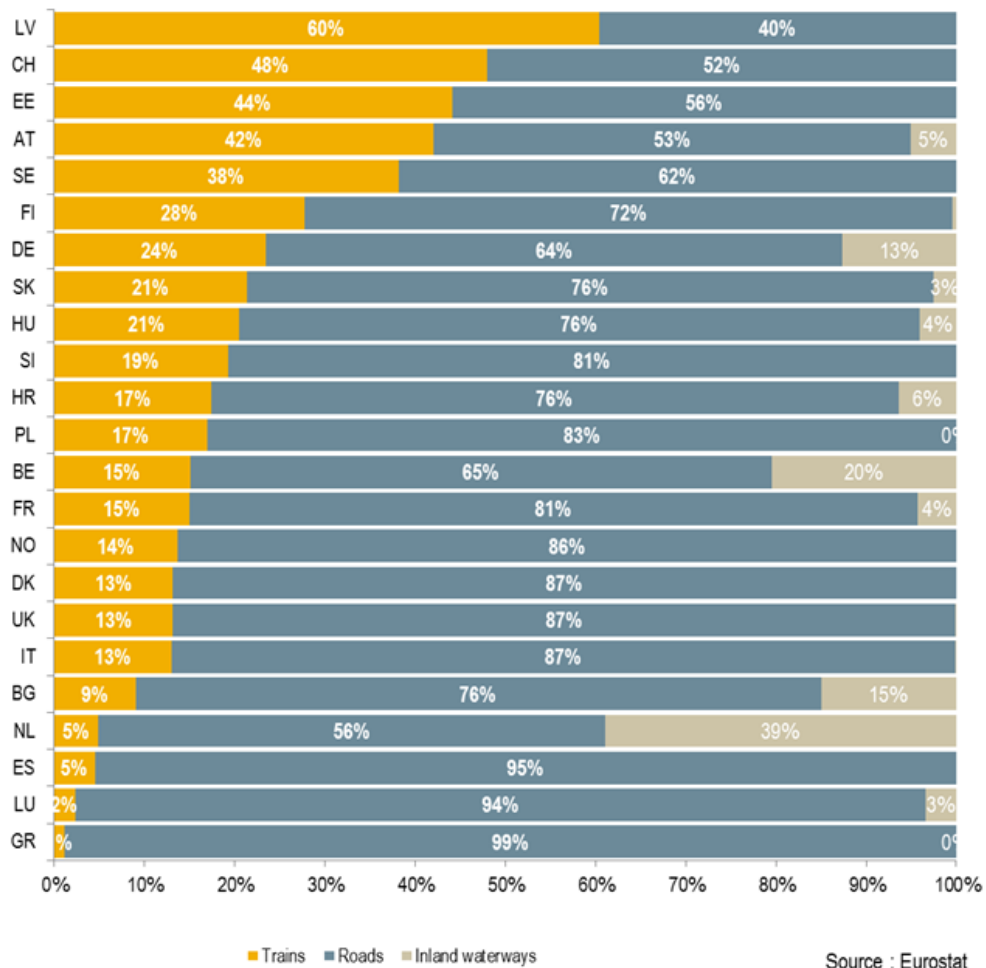
Data	Definition
<b>Active railway undertakings</b>	Any public or private undertakings which provide services for the transport of goods and/or passengers by rail network(s), as these networks are defined in Directive 2012/34/EU. Excluded from the scope are railway undertakings: I. whose only business is to provide services for the transport of passengers by metro, tram and/or light rail, II. which operate entirely or mainly within industrial and similar installations, including harbors, III. which mainly provide local tourist services such as preserved historical steam railways. The definition 'active railway undertakings' used by the working group reflects the definition of railway undertakings of Eurostat (Regulation 91/2003) whilst adding the requirement of being active on the network(s).
<b>Currency exchange rate</b>	Annual average exchange rate between the Euro and other currencies. Source: Eurostat.
<b>Freight terminals</b>	All facilities in rail freight transport which are specifically built and used for the loading and unloading of freight trains. Including loading ramps and roads, intermodal terminals and all other loading / unloading facilities.
<b>Gross tonne</b>	Weight of the train, including the weight of the load, the weight of the locomotive and the tare weight of the wagons
<b>Inflation rate</b>	Annual average inflation rate. Source: Eurostat Harmonised Indices of Consumer Prices (HICP)
<b>Incumbent railway undertaking</b>	Railway undertaking that was part of a state-controlled railway monopoly (or, still is), including all related companies with an ownership in relation to the incumbent railway undertaking.
<b>International passenger traffic</b>	Passenger traffic where the train crosses at least one border and where the principal purpose of the traffic is to carry passengers between stations located in different Member States. This definition reflects the definition of 'international passenger service' as specified in Article 3(5) of Directive 2012/34/EU.
<b>Intermodal freight terminals</b>	Facilities in rail freight transport which are specifically built for intermodal transport (container, swap bodies, semitrailer).
<b>International freight traffic</b>	Freight traffic where the train crosses at least one border. This definition reflects the definition of 'international freight service' as specified in Article 3(4) of Directive 2012/34/EU.
<b>Maintenance facilities</b>	Facilities where rolling stock is maintained. Maintenance is the set of activities designed to keep rolling stock in operation. This includes both, heavy and light maintenance.
<b>Marshalling yards with gravity hills</b>	Facilities for the formation, sorting, rearranging, solving and treatment of trains and which use gravity as a means of formation or rearrangement of trains.
<b>Net tonne</b>	Weight of the load (including for example the container weight) where ton is 1000 kilograms
<b>Passenger stations</b>	Facilities where passengers can embark and disembark a passenger train. Stations not in use are excluded.
<b>Refuelling facilities</b>	Station for refuelling for locomotives and multiple units
<b>Revenue collected by the infrastructure manager</b>	Revenue for all track access charges for the minimum access package as specified in Article 13(1) of Directive 2012/34/EU excluding electricity
<b>Route length</b>	Length of all routes available for freight and passenger traffic on the network of the infrastructure manager, as specified by the infrastructure manager in the Network Statement, as opposed to track length.

## 2. Annex 2 – Modal split

Following figures provide contextual elements on the national modal shares between different transportation modes. IRG-Rail members want to underpin that these figures are published by Eurostat and hence cannot be endorsed by IRG-Rail. Furthermore, it appears necessary to stress that these values may not offer an extensive reflection of reality due to different traffic estimation methods according to the transportation mode studied. In road freight for example, national statistics offices are often limited to a specific perimeter (e.g., per undertakings present in the country, per Member State license plate) and are still perfecting their estimation models.



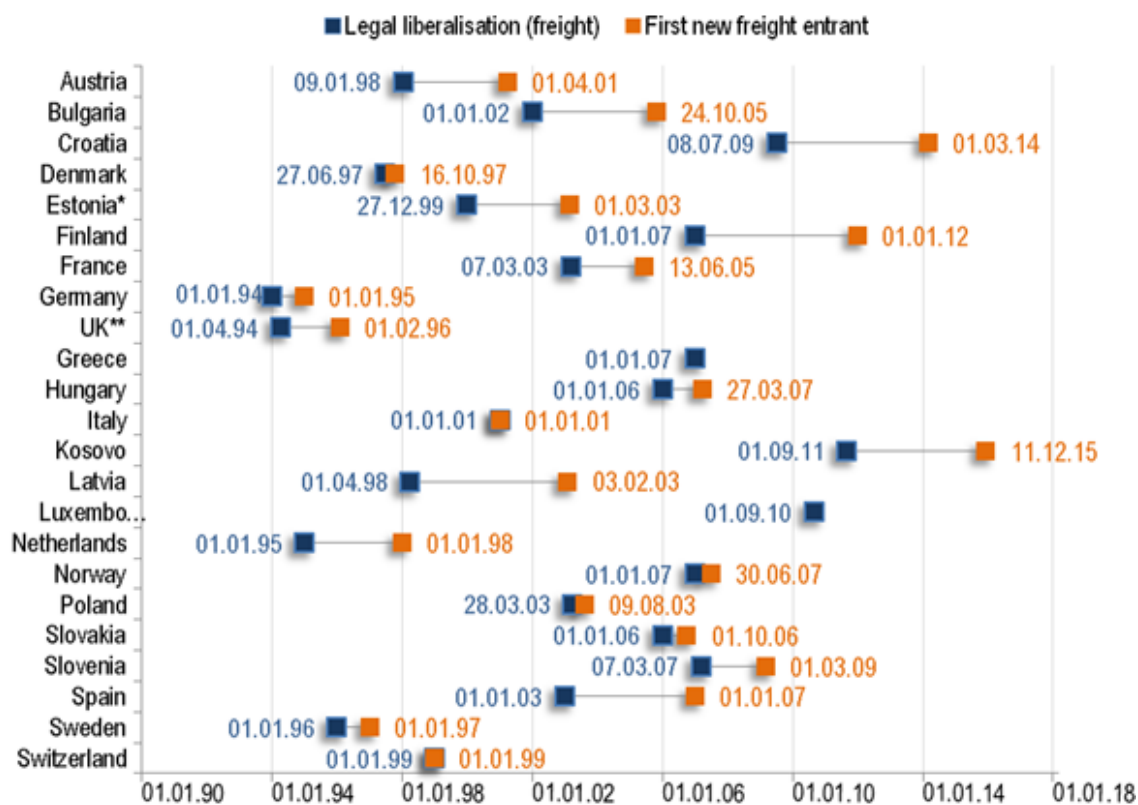
## Modal split of freight transport in 2013 in tonne-kilometres



### 3. Annex 3 - Network and market structure

#### 3.1. Markets liberalisation

Figure 1 - Legal liberalisation in the freight sector

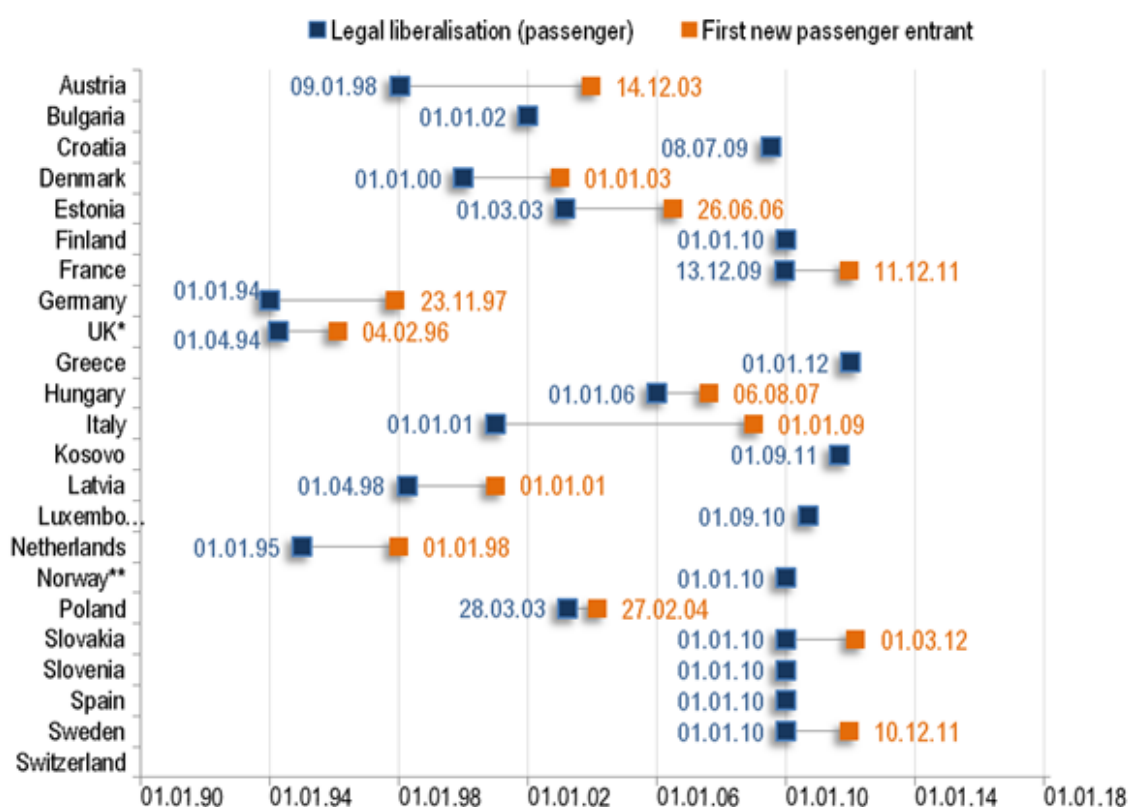


\* Estonia had a new freight entrant before legal liberalisation on 1st March 2003

\*\* United Kingdom : The dates given refer to the liberalisation of the market in Great Britain. The rail market in Northern Ireland continue to be owned by the state.

Where exact dates are not available, they have been set to the appropriate year.



Figure 2 - Legal liberalisation in the passenger sector



\* United Kingdom : The dates given refer to the liberalisation of the market in Great Britain. The rail market in Northern Ireland continue to be owned by the state.




\*\* IRG Rail considers the market of Norway partly liberalised in January 2010 although a new operator entered the market already in 2006 (see annex).

Figure 3 - Legal liberalisation







 <p><b>Austria</b></p> <p>Date of legal liberalisation:</p> <ul style="list-style-type: none"> <li>Freight railway market: 9 January 1998.</li> <li>Passenger railway market: 9 January 1998</li> </ul> <p>Date of entry of first new entrant into market:</p> <ul style="list-style-type: none"> <li>Freight: 1 April 2001.</li> <li>Passenger: 14 December 2003.</li> </ul>	 <p><b>Belgium</b></p> <p>Date of legal liberalisation:</p> <ul style="list-style-type: none"> <li>Freight railway market (Combined international transport): 5 February 1997</li> <li>Freight railway market (Trans European Network): 12 March 2003</li> <li>Freight railway market (entirely): 1 January 2007.</li> <li>Passenger railway market (international): 1 January 2010.</li> <li>Passenger railway market (national): none</li> </ul> <p>Date of entry of first new entrant into market:</p> <ul style="list-style-type: none"> <li>Freight: 2 April 2002</li> <li>International Passenger: 2010 (Eurostar)</li> </ul>	 <p><b>Bulgaria</b></p> <p>Date of legal liberalisation:</p> <ul style="list-style-type: none"> <li>Freight railway market: 1 January 2002.</li> <li>Passenger railway market: 1 January 2002.</li> </ul> <p>Date of entry of first new entrant into market:</p> <ul style="list-style-type: none"> <li>Freight: 15 April 2005.</li> <li>Passenger: no new entrant.</li> </ul>
 <p><b>Croatia</b></p> <p>Date of legal liberalisation:</p> <ul style="list-style-type: none"> <li>Freight railway market: 8 July 2009.</li> <li>Passenger railway market: 8 July 2009.</li> </ul> <p>Date of entry of first new entrant into market:</p> <ul style="list-style-type: none"> <li>Freight: 1 March 2014.</li> <li>Passenger: no new entrant.</li> </ul>	 <p><b>Denmark</b></p> <p>Date of legal liberalisation:</p> <ul style="list-style-type: none"> <li>Freight railway market: Beginning June 27th 1997.</li> <li>Passenger railway market: January 1st 1999.</li> </ul> <p>Date of entry of first new entrant into market:</p> <ul style="list-style-type: none"> <li>Freight: October 16th 1997 (Privat Banen Sønderjylland).<sup>1</sup></li> <li>Passenger: 2003 (Arriva).</li> </ul>	 <p><b>Estonia</b></p> <p>Date of legal liberalisation:</p> <ul style="list-style-type: none"> <li>Freight railway market: 1 March 2003.</li> <li>Passenger railway market: 1 March 2003.</li> </ul> <p>Date of entry of first new entrant into market:</p> <ul style="list-style-type: none"> <li>Freight: 27 December 1999 (AS Maardu Raudtee).</li> <li>Passenger: 26 June 2006 (AS GoRail).</li> </ul>
 <p><b>Finland</b></p> <p>Date of legal liberalisation:</p> <ul style="list-style-type: none"> <li>Freight railway market: Beginning of 2007.</li> <li>Passenger railway market: The domestic passenger market is legally open to competition (there are no legal provisions prohibiting entry). However, due to exclusive</li> </ul>	 <p><b>France</b></p> <p>Date of legal liberalisation:</p> <ul style="list-style-type: none"> <li>Freight railway market: 7 March 2003 for international transport, 31 March 2006 for national transport.</li> <li>Passenger railway market: 13 December 2009 for international transport.</li> </ul>	 <p><b>Germany</b></p> <p>Date of legal liberalisation:</p> <ul style="list-style-type: none"> <li>Freight railway market: 1994 (domestic and cross-border).</li> <li>Passenger railway market: 1994 (domestic and cross-border).</li> </ul> <p>Date of entry of first new entrant into market<sup>2</sup> :</p>

<sup>1</sup> In Denmark the market for domestic freight service was open to domestic operators before 1999, when the market for international freight service was liberalised.



<p>rights and direct award of public service contracts to VR Group the passenger railway market is not open to competition. The international passenger market is open since the beginning of 2010.</p> <p>Date of entry of first new entrant into market:</p> <ul style="list-style-type: none"> <li>Freight: 15 May 2012 (licence awarded to Ratarahiti Ltd). Ratarahiti Ltd concentrates its activities on local operations at eastern part of Finland.</li> <li>Passenger: no new entrant</li> </ul>	<p>Date of entry of first new entrant into market:</p> <ul style="list-style-type: none"> <li>Freight: 13 June 2005 (international).</li> <li>Passenger: 11 December 2011 (international).</li> </ul>	<ul style="list-style-type: none"> <li>Freight: <ul style="list-style-type: none"> <li>Karsdorfer Eisenbahngesellschaft (insolvent since 2004) – 1995</li> <li>Rail4chem Eisenbahngesellschaft mbH - 2001</li> </ul> </li> <li>Long distance passenger services: <ul style="list-style-type: none"> <li>Georg Verkehrsorganisation (GVG) – 2000</li> <li>Ostseelandverkehr GmbH (OLA) "Interconnex" - 2002</li> </ul> </li> <li>Regional passenger services: <ul style="list-style-type: none"> <li>Vogtlandbahn GmbH – 1997</li> <li>Ostmecklenburgische Eisenbahn GmbH (OME) - 1998</li> </ul> </li> </ul>
 <p><b>Greece</b></p>	 <p><b>Hungary</b></p>	 <p><b>Italy</b></p>
<p>Date of legal liberalisation:</p> <ul style="list-style-type: none"> <li>Freight railway market: 1 January 2007</li> <li>Passenger railway market: 1 January 2010 for international</li> </ul> <p>Date of entry of first new entrant into market:</p> <ul style="list-style-type: none"> <li>Freight: no new entrant</li> <li>Passenger: no new entrant</li> </ul>	<p>Date of legal liberalisation:</p> <ul style="list-style-type: none"> <li>Freight railway market: 1 January 2006.</li> <li>Passenger railway market: partly liberalised. Passenger operators that are registered in Hungary have been entitled to open access since 1 January, 2006. Passenger operators providing international services with a licence issued in the EEA have been entitled to open access since 21 June 2009.</li> </ul> <p>Date of entry of first new entrant into market:</p> <ul style="list-style-type: none"> <li>Freight: 27 March 2007 (the first new entrant entered the market in June 2004 before it was fully liberalised; the first licence for a railway undertaking after the full liberalisation of the market was granted on 27 March 2007).</li> <li>Passenger: 6 August 2007.</li> </ul>	<p>Date of legal liberalization:</p> <ul style="list-style-type: none"> <li>Freight railway market: 2001.</li> <li>Passenger railway market: 2001.</li> </ul> <p>Date of entry of first new entrant into market:</p> <ul style="list-style-type: none"> <li>Freight: 2001.</li> <li>Long distance passenger services: 2009</li> <li>Long distance passenger services High Speed: 2012</li> <li>Regional passenger services: 2009.</li> </ul>

<sup>2</sup> Already before the first step of the railway reform in Germany non-incumbent railway undertakings offered regional and national traffic services but not in direct competition with public railway services (e.g. routes no longer operated by the incumbent railway services or in cooperation). Therefore it is difficult to define the first entry date in the German railway market under real competitive conditions, in particular for regional passenger and for freight services.

 <p><b>Kosovo</b></p> <p>Date of legal liberalisation:</p> <ul style="list-style-type: none"> <li>○ Freight railway market: 1 September 2011.</li> <li>○ Passenger railway market: 1 September 2011.</li> </ul> <p>Date of entry of first new entrant into market:</p> <ul style="list-style-type: none"> <li>○ Freight: new licensed entrant 11 December 2015.</li> <li>○ Passenger: no new entrant.</li> </ul>	 <p><b>Latvia</b></p> <p>Date of legal liberalisation:</p> <ul style="list-style-type: none"> <li>○ Freight railway market: 1 April 1998.</li> <li>○ Passenger railway market: 1 April 1998.</li> </ul> <p>Date of entry of first new entrant into market:</p> <ul style="list-style-type: none"> <li>○ Freight: 3 February 2003.</li> <li>○ Passenger: 1 January 2001.</li> </ul>	 <p><b>Luxembourg</b></p> <p>Date of legal liberalisation:</p> <ul style="list-style-type: none"> <li>○ Freight railway market: 1 September 2010.</li> <li>○ Passenger railway market: 1 September 2010.</li> </ul>
 <p><b>Netherlands</b></p> <p>Date of legal liberalisation:</p> <ul style="list-style-type: none"> <li>○ Freight railway market: 1995.</li> <li>○ Passenger railway market: <ul style="list-style-type: none"> <li>○ 1995 (private passenger transport and international passenger transport under cooperation)</li> <li>○ 1998 (experiments with tenders)</li> <li>○ 1 January 2005 (liberalisation of regional passenger transport)</li> </ul> </li> </ul> <p>Date of entry of first new entrant into market:</p> <ul style="list-style-type: none"> <li>○ Freight: 1998 (Shortlines)</li> <li>○ Passenger: 2000 (Noordnet).</li> </ul>	 <p><b>Norway</b></p> <p>Date of legal liberalisation:</p> <ul style="list-style-type: none"> <li>○ Freight railway market: 1 January 2007.</li> <li>○ Passenger railway market: 1 January 2010 for international services. The market for national passenger traffic is not yet liberalised, NSB AS has exclusive rights to perform such transport, with the exception of the airport express train (operated by Flytoget AS) and the Gjøvik-Oslo line, which was tendered (and is operated by NSB Gjøvikbanen).</li> </ul> <p>Date of entry of first new entrant into market:</p> <ul style="list-style-type: none"> <li>○ Freight: 2007</li> <li>○ Passenger: 11 June 2006, NSB Gjøvikbanen entered as a result of winning a tender for Oslo–Gjøvik.</li> </ul>	 <p><b>Poland</b></p> <p>Date of legal liberalisation:</p> <ul style="list-style-type: none"> <li>○ Freight railway market: 8 August 2000 - date of Act for restructuring of the PKP State Company (in 2001 new companies from the PKP group started to operate). 28 March 2003 - introduction of Railway Transport Act. From then railway undertakings started to be licensed and infrastructure manager had to give an un-discriminatory access to new entrants.</li> <li>○ Passenger railway market: 8 August 2000 - date of Act for restructuring of the PKP State Company (in 2001 new companies from the PKP group started to operate). 28 March 2003 - introduction of Railway Transport Act. From then railway undertakings started to be licensed and infrastructure manager had to give an un-discriminatory access to new entrants.</li> </ul> <p>Date of entry of first new entrant into market:</p> <ul style="list-style-type: none"> <li>○ Freight: 29 August 2003 – award of first license to a freight railway undertaking</li> <li>○ Passenger: 27 February 2004 – award of first license to passenger railway undertaking.</li> </ul>




 <p><b>Slovakia</b></p> <p>Date of legal liberalisation:</p> <ul style="list-style-type: none"> <li>○ Freight railway market: January 2006.</li> <li>○ Passenger railway market: January 2010.</li> </ul> <p>Date of entry of first new entrant into market:</p> <ul style="list-style-type: none"> <li>○ Freight: October 2006.</li> <li>○ Passenger: March 2012.</li> </ul>	 <p><b>Slovenia</b></p> <p>Date of legal liberalisation:</p> <ul style="list-style-type: none"> <li>○ Freight railway market: 7 March 2007</li> <li>○ Passenger railway market: 1 January 2010</li> </ul> <p>Date of entry of first new entrant into market:</p> <ul style="list-style-type: none"> <li>○ Freight: 1 March 2009 (RCA)</li> <li>○ Passenger: no new entrants</li> </ul>	 <p><b>Spain</b></p> <p>Date of legal liberalisation:</p> <ul style="list-style-type: none"> <li>○ Freight railway market: 2003 international, 2005 national.</li> <li>○ Passenger railway market: 2010 International; 2013 Touristic traffic (Railway passenger services liberalized in Spain are those which have the main purpose of providing touristic services, that is: they should be bundled and sold by a travel agency, including additional services like accommodation or touristic services representing a significant part of the bundle). General commercial passenger traffic is expected to be opened to competition during 2015.</li> </ul> <p>Date of entry of first new entrant into market:</p> <ul style="list-style-type: none"> <li>○ Freight: January 2007 (Acciona Rail Services).</li> <li>○ Passenger: No new entrants.</li> </ul>
 <p><b>Sweden</b></p> <p>Date of legal liberalisation:</p> <ul style="list-style-type: none"> <li>○ Freight railway market: 1996.</li> <li>○ Passenger railway market: gradual introduction, legally in 2010, practically in December 2011.</li> </ul> <p>Date of entry of first new entrant into market:</p> <ul style="list-style-type: none"> <li>○ Freight: 1 January 1997 (BSM Järnväg AB). There were some private railway undertakings before that date but performing traffic as subcontractor to the incumbent SJ which at that time performed both passenger and freight traffic. Today 12 companies operate in the freight sector on the national infrastructure.</li> <li>○ Passenger: Since tendering of passenger traffic started back in 1998 there have been a number of entrants as well as exits due to that</li> </ul>	 <p><b>Switzerland</b></p> <p>Date of legal liberalisation:</p> <ul style="list-style-type: none"> <li>○ Freight railway market: 1<sup>st</sup> January 1999</li> <li>○ Passenger railway market: The market in this segment has not been liberalized yet.</li> </ul> <p>Date of entry of first new entrant into market:</p> <ul style="list-style-type: none"> <li>○ Freight: 1<sup>st</sup> January 1999 (Lokoop). Lokoop and its mother company, MThB were fully integrated into the SBB-Group in 2002</li> <li>○ Passenger: None. There are several RU (Mostly owned by State, Cantons and Municipalities), that practice regional passenger-traffic in geographically defined areas. Long-distance passenger transport is offered only by the incumbent company (SBB) or Joint Ventures,</li> </ul>	 <p><b>United Kingdom</b></p> <p>Date of legal liberalisation:</p> <ul style="list-style-type: none"> <li>○ Freight railway market: 1994.</li> <li>○ Passenger railway market: 1994.</li> </ul> <p>Date of entry of first new entrant into market:</p> <ul style="list-style-type: none"> <li>○ Freight: 1996 (North and South Railways).</li> <li>○ Passenger: 1996 (date of introduction of first franchise – Great Western Train).</li> </ul>




<p>procedure. When the market was fully liberalised on 10 December 2011 a number of operators were ready for full competition. Today 15 railway undertakings operate in the passenger sector on the national infrastructure.</p>	<p>where SBB is the main stakeholder. The legal basis for performing the passenger traffic is a specific license ("Konzession") issued by the State.</p>	
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### 3.2. Ownership structure

Following table provides information about the train companies and their ownership.




Figure 4 - Ownership structure

 <b>Austria</b>	 <b>Belgium</b>	 <b>Bulgaria</b>
<p><u>Regulatory Authority:</u> Schienen-Control GmbH</p> <p><u>Freight</u></p> <ul style="list-style-type: none"> <li>- RCA: 100% public</li> <li>- Lokomotion: 30% DB Schenker, 70% various institutions with public ownership</li> <li>- LTE: 100% public (was 50% private, new partner to be announced May 2015)</li> <li>- Cargoserv, Ecco-Rail, RTS: 100% private</li> <li>- TXL: 100% public (Trenitalia)</li> <li>- Raaberbahn Cargo: 93.8% public</li> <li>- SLB, STB, GKB, MBS, WLC: 100% public</li> <li>- RPA: 53% private, 47% public (City of Hamburg: 68% HHLA, HHLA: 85% Metrans, Metrans: 80% RPA)</li> </ul> <p><u>Passenger</u></p> <ul style="list-style-type: none"> <li>- ÖBB PV 100% public</li> <li>- WLB, GKB, StLB, MBS, StH, SLB: 100% public</li> <li>- CAT: 49.9% ÖBB PV, 50.1% Vienna Airport (public majority)</li> <li>- WESTbahn: 74% private, 26% public (SNCF Voyageurs)</li> </ul>	<p><u>Regulatory Authority:</u> Regulatory Service for Railway Transport and for Brussels Airport Operations</p> <p><u>Freight</u></p> <p>Companies with at least 1% market share:</p> <ul style="list-style-type: none"> <li>- NMBS Logistics 100% Public (NMBS)</li> <li>- Crossrail 100% private</li> <li>- DBSN 100% public (92% DB AG ,6% NS and 2% Danske Statsbaner)</li> <li>- SNCF fret 100% public (SNCF Geodis)</li> <li>- Railtraxx 100% private</li> <li>- Captrain 100% public (SNCF Geodis)</li> <li>- Transport 100% private</li> </ul> <p><u>Passenger</u></p> <ul style="list-style-type: none"> <li>- National: NMBS 100% public</li> <li>- International: <ul style="list-style-type: none"> <li>o NMBS 100% public</li> <li>o Eurostar (SNCF 55%, SNCB 5% and LCR 40%)</li> </ul> </li> </ul>	<p><u>Regulatory Authority:</u> Railway Administration Executive Agency</p> <p><u>Freight</u></p> <ul style="list-style-type: none"> <li>- BDZ – Cargo Ltd 100% public</li> <li>- Bulgarian Railway Company JSC - 100% private</li> <li>- Bulmarket DM Ltd. - 100% private</li> <li>- DB Schenker Rail Bulgaria Ltd. - 100% private</li> <li>- Gastrade JSC - 100% private</li> <li>- Express Service Ltd - 100% private</li> <li>- State Entity Transport Construction and Rehabilitation - 100% public</li> <li>- Cargotrans Vagon Bulgaria JSC - 100% private</li> <li>- Port Rail Ltd - 100% private</li> </ul> <p><u>Passenger</u></p> <p>BDZ – Passenger Services Ltd. - 100% public</p>

 Croatia	 Denmark	 Estonia
<p><u>Regulatory Authority:</u> Croatian Regulatory Authority for Network Industries (HAKOM)</p> <p><u>Freight</u> 98,8% public 1,2% private</p> <p><u>Passenger</u> 100% public</p>	<p><u>Regulatory Authority:</u> Danish Rail Regulatory Body</p> <p><u>Freight</u></p> <ul style="list-style-type: none"> <li>- DB Schenker Rail Scandinavia (owned 51% by -</li> <li>- DB Schenker Rail Deutschland GmbH and 49% by Green Cargo)</li> <li>- Hector Rail (private)</li> <li>- TX Logistik Captrain AB (formerly Railcare - private)</li> <li>- CFL Cargo (owned 66,7% by CFL and 33,3% by ArcelorMittal)</li> </ul> <p><u>Passenger</u></p> <ul style="list-style-type: none"> <li>- DSB (State owned)</li> <li>- Arriva Tog A/S (owned by Deutsche Bahn)</li> <li>- Metro Service A/S (State/city owned)</li> <li>- Lokalbanen A/S (PTA – public/regional owned)</li> <li>- Regionstog A/S (PTA – public/regional owned)</li> <li>- Nordjyske Jernbaner A/S (PTA – public/regional owned)</li> <li>- Midtjyske Jernbaner A/S (PTA – public/regional owned)</li> <li>- Nord-Ostsee-Bahn GmbH (owned by Veolia Transport GmbH)</li> <li>- Regionalbahn Schleswig-Holstein SJ AB (owned by the Swedish state)</li> </ul>	<p><u>Regulatory Authority:</u> Estonian Competition Authority</p> <p><u>Freight</u></p> <ul style="list-style-type: none"> <li>- AS EVR Cargo (100% State)</li> <li>- AS E.R.S. (100% private)</li> <li>- AS Maardu Raudtee (100% private)</li> <li>- AS Railservis (100% private)</li> <li>- AS Kunda Trans (100% private)</li> <li>- AS Sillamäe Sadam (100% private)</li> <li>- Westgate Transport OÜ (100% private)</li> <li>- OÜ Dekoil (100% private)</li> <li>- Vesta Terminal Tallinn OÜ (100% private)</li> <li>- Edelaraudtee AS (100% private)</li> <li>- AS Alexela Terminal (100% private)</li> <li>- Eesti Energia Kaevandused AS (100% public)</li> <li>- Leonhard Weiss RTE AS (100% private)</li> <li>- RVTest OÜ (100% private)</li> </ul> <p><u>Passenger</u></p> <ul style="list-style-type: none"> <li>- AS Eesti Liinirongid (former name Elektriraudtee AS) (100% state)<sup>3</sup></li> <li>- Edelaraudtee AS (100% private)<sup>4</sup></li> <li>- AS GoRail Aktsiaselts SEBE</li> </ul>




<sup>3</sup> AS Eesti Liinirongid operates from June 2013 public passenger transport all over Estonia. The contract is valid until 2018. There is no train connection to other Baltic States or EU States. The only international rail passenger route goes to Moscow, and is operated by GoRail.

<sup>4</sup> Edelaraudtee AS (Edelaraudtee Ltd) is a railway company founded in 1997. Since then it has operated diesel passenger trains all over Estonia. There is no train connection to other Baltic States or EU States. The only international rail passenger route goes to Moscow, and is operated by GoRail. Edelaraudtee AS has still an operating licence, but it stopped providing passenger transport from 29 June 2013.

 <b>Finland</b>	 <b>France</b>	 <b>Germany</b>
<p><u>Regulatory Authority</u>: The Finnish Transport Safety Agency</p> <p><u>Freight</u> VR Ltd is the incumbent railway undertaking in Finland, entirely (100%) owned by government. Duties relating to state ownership steering of VR are handled in the Government Ownership Steering Department in the Prime Minister's Office. Ratarahiti Ltd (100 % private).</p> <p><u>Passenger</u> - VR Ltd is the incumbent railway undertaking in Finland, totally (100%) owned by government.</p>	<p><u>Regulatory Authority</u>: Autorité de régulation des activités ferroviaires et routières (Arafer) – French Rail and Road Regulatory Authority (named Autorité de regulation des activités ferroviaires – Araf in 2014)</p> <p><u>Freight</u> <i>Incumbents:</i> - Captrain Italia SRL - Fret SNCF - VFLI</p> <p><i>Other companies:</i> - CFL Cargo France (owned at 66.67% by Luxemburgish incumbent CFL) - DB Schenker Rail Nederland (owned by German incumbent DB) - ECR (owned by DB Schenker Rail) - Europorte Channel (owned by Eurotunnel Group) - Europorte France (owned by Eurotunnel Group) - Fer Alliance - OSR (On Site Rail) France (owned by Belgian incumbent SNCB) - Regiorail LR (Languedoc-Roussillon) (owned by Eurorail and Railroad Development Corporation) - SNCB Logistics (Belgian incumbent) - TX Logistik (owned by the Italian incumbent FS)</p> <p><i>Rail maintenance companies providing freight service:</i> - Colas Rail (owned by Bouygues Group) - ETF (owned by Vinci Group) - ETMF - Secuirail - TSO (individual shareholders)</p> <p><u>Passenger</u></p>	<p><u>Regulatory Authority</u>: Bundesnetzagentur</p> <p><u>Freight</u> - Incumbent (incl. foreign incumbents) : 81%  <ul style="list-style-type: none"> <li>Public: 5%</li> <li>Private: 14%</li> </ul> - 10 major freight train companies (in terms of traffic):  <ul style="list-style-type: none"> <li>boxXpress.de GmbH</li> <li>DB Schenker Rail AG</li> <li>HSL Logistik GmbH</li> <li>hvlle Havelländische Eisenbahn AG</li> <li>ITL-Eisenbahngesellschaft mbH</li> <li>METRANS Rail</li> <li>RBH Logistics GmbH</li> <li>RheinCargo GmbH &amp; Co. KG</li> <li>SBB Cargo Deutschland GmbH</li> <li>TX Logistik AG</li> </ul> </p> <p><u>Passenger</u> <u>Passenger regional train companies</u> Incumbent (incl. foreign incumbents): 86%  <ul style="list-style-type: none"> <li>Public: 6%</li> <li>Private: 8%</li> </ul> - 10 major regional passenger train companies (in terms of traffic):  <ul style="list-style-type: none"> <li>Bayerische Oberlandbahn GmbH</li> <li>DB Regio AG</li> <li>DB RegioNetz Verkehrs GmbH</li> <li>DB ZugBus RegionalverkehrAlb-Bodensee GmbH</li> <li>metronom Eisenbahngesellschaft mbH</li> <li>NordWestBahnGmbH</li> <li>ODEG Ostdeutsche Eisenbahn GmbH</li> <li>S-Bahn Berlin GmbH</li> </ul> </p>

	<p><i>Incumbent or related companies:</i></p> <ul style="list-style-type: none"> <li>- Alleo: managing the commercial partnership between French and German incumbents on international routes</li> <li>- CBA: operates on a narrow-gauge line in the Centre-Val de Loire Region as a franchised train under PSO contract signed by the incumbent</li> <li>- Elipsos: managing the commercial partnership between French and Spanish incumbents on international routes</li> <li>- Eurostar International Limited (owned at 55% by SNCF, at 40% by the British Treasury and 5% by Belgian incumbent SNCB)</li> <li>- Lyria (owned by SNCF at 74% and Swiss incumbent CFF at 26%)</li> <li>- SNCF Mobilités</li> <li>- Thalys (owned by SNCF as majority shareholder)</li> <li>- TMR (Transport de Martigny et Régions): operates in the east of the Rhône-Alpes Region as a franchised train under PSO contract signed by the incumbent</li> </ul> <p><i>Other companies :</i></p> <ul style="list-style-type: none"> <li>- CFC: owned by the Assembly of Corsica for regional PSO traffic since 2012.</li> <li>- RRT PACA: owned by the Regional Council of Provence-Alpes-Côte d'Azur for regional PSO between Nice and Digne-les-Bains.</li> <li>- Thello: subsidiary of Italian incumbent providing international and cabotage service between France and Italy.</li> <li>- Trenitalia: formally a RU in France, supports the activities of its subsidiary "Thello".</li> </ul>	<ul style="list-style-type: none"> <li>○ S-Bahn Hamburg GmbH</li> <li>○ Vogtlandbahn-GmbH</li> </ul> <p><u>Passenger long-distance</u> Incumbent (incl. foreign incumbents): ≈ 99% Public / Private: ≈ 1%</p> <p>- Major long-distance passenger train companies (in terms of traffic):</p> <ul style="list-style-type: none"> <li>○ DB Fernverkehr AG</li> <li>○ HKX Hamburg-Köln-Express GmbH</li> <li>○ OLA Ostseeland Verkehr GmbH (last long-distance service on Dec 13th 2014)</li> </ul>
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 <b>Greece</b>	 <b>Hungary</b>	 <b>Italy<sup>5</sup></b>
<p><u>Regulatory Authority</u>: Greek Regulatory Authority for Railways ("RAS")</p> <p><u>Freight</u> TRAINOSE SA (100% public)</p> <p><u>Passenger</u></p> <ul style="list-style-type: none"> <li>- TRAINOSE SA (100% public)</li> <li>- Urban Rail Transport SA (STASY SA) (100% public)</li> </ul>	<p><u>Regulatory Authority</u>: National Transport Authority</p> <p><u>Freight</u> Please note that in the figures below, public ownership means state share. MÁV Zrt. and GYSEV Zrt., which are (at least partly) state-owned companies are considered private owners in the case of the indicated RUs:</p> <ul style="list-style-type: none"> <li>- Rail Cargo Hungaria Zrt. 100% private</li> <li>- GYSEV Cargo Zrt.: 100% private (subsidiary of IM GYSEV Zrt.)</li> <li>- MMV Zrt.: 100% private</li> <li>- Floyd Zrt.: 100% private</li> <li>- CER Hungary Zrt.: 100% private</li> <li>- Train Hungary Kft.: 100% private</li> <li>- AWT Rail HU Zrt.: 100% private</li> </ul> <p><u>Passenger</u></p> <ul style="list-style-type: none"> <li>- MÁV-Start Zrt.: 100% private (subsidiary of IM MÁV Zrt.)</li> <li>- GYSEV Zrt.: 93.8% public (Hungarian State – 65.6%, Austrian State -28.2%)</li> <li>- MÁV Nosztalgia Kft.: 100% private (partly owned by MÁV Zrt.)</li> </ul>	<p><u>Regulatory Authority</u>: Autorità di Regolazione dei Trasporti (ART)</p> <p><u>Freight</u></p> <p>Major freight train companies (in terms of traffic):</p> <ul style="list-style-type: none"> <li>- Trenitalia S.p.A. – Cargo: Public 100%: FSI (Group)</li> <li>- Rail Traction Company S.p.A.: Foreign Incumbent - STR SpA - società di trasporti su rotaia Joint Stock Company 95,53% DB Schenker Rail Deutschland AG 4,47%)</li> <li>- NordCargo S.r.l.: 40% of quotas FERROVIENORDMILANO (FNM S.p.A. Joint Stock Company) 60% of quotas DB Schenker Rail Italia S.r.l. (Limited Company)</li> <li>- Captrain Italia S.r.l.: Foreign Incumbent 100% di SNCF Logistics (branch)</li> <li>- SBB Cargo Italia S.r.l.: Foreign incumbent: FFS Cargo SA (75%), Hupac SA (25%)</li> <li>- Rail Cargo Italia S.r.l.: Foreign Incumbent: Subsidiary Rail Cargo Group Austria</li> <li>- Oceanogate Italia S.p.A.: Private: Contship Italia S.p.A. (50%) Tper S.p.A. (Joint Stock Company) (50%)</li> <li>- Compagnia Ferroviaria Italiana S.p.A.: Private 100%</li> <li>- G.T.S. Rail S.r.l.: Private 100% GTS Group S.p.A. - Joint Stock Company</li> <li>- Interporto Servizi Cargo S.p.A.: unknown</li> <li>- TX Logistic AG (Filiale Italia): Public 100%</li> <li>- Trenitalia FSI Group – Crossrail Italia S.r.l.: unknown</li> </ul>

<sup>5</sup> Due to the multiplicity of railway undertakings in the Italian market the information is limited to the major companies in the freight and the regional passenger market as well as to the major companies in the long-distance passenger market, weighted by the share of traffic (km\*train- 2013).



		<ul style="list-style-type: none"> <li>- Serfer Servizi Ferroviari S.r.l.: FSI Group 100% Trenitalia SPA Subsidiary</li> <li>- Ferrovia Adriatico Sangritana S.p.A.: Public 100% Abruzzo Region</li> <li>- FuoriMuro Servizi Portuali e Ferroviari S.r.l.: Private Limited</li> <li>- TPER S.p.A - servizio merci: Public</li> <li>- Rail One S.p.A.: Private 100%</li> <li>- HUPAC S.p.A.: Foreign Incumbent 100% HUPAC SA</li> <li>- Ferrovie Udine Cividale S.r.l.: Public 100% Friuli Venezia Giulia Region</li> </ul> <p><u>Passenger</u></p> <p>Major <u>regional passenger train companies</u> (in terms of traffic):</p> <ul style="list-style-type: none"> <li>– Trenitalia S.p.A. – Regionale: Public</li> <li>– TreNord S.r.l.: Public</li> <li>– TPER S.p.A - servizio viaggiatori: Public Regional</li> <li>– SAD Trasporto Locale S.p.A.: Public Regional</li> <li>– Ferrovia Adriatico Sangritana S.p.A.: Public Regional</li> <li>– InRail S.p.A.: Private</li> <li>– Ente Autonomo Volturno S.r.l.: Public Regional</li> <li>– Ferrovie del Gargano S.r.l.: Public Regional</li> <li>– Ferrotramviaria S.p.A.: Public Regional</li> <li>– Ferrovie Udine Cividale S.r.l.: Public Regional</li> <li>– Sistemi Territoriali S.p.A.: Public Regional</li> <li>– Trentino Trasporti Esercizio S.p.A.: Public Regional</li> <li>– Serfer Servizi Ferroviari S.r.l.: Public FSI Group</li> <li>– Umbria T.P.L. E Mobilità S.p.A: Public Regional</li> <li>– GTT S.p.A.: Public Regional</li> <li>– TFT S.p.A.: Public Regional</li> <li>– Ferrovie della Calabria S.r.l.: Public Regional</li> </ul>
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		Major <u>long-distance passenger train companies</u> (in terms of traffic): – Trenitalia: FSI Group – NTV - Società Viaggiatori Italia S.r.l.: 80% private, 20% public (French National Railways; SNCF)
 <b>Kosovo</b>	 <b>Latvia</b>	 <b>Luxembourg</b>
<u>Freight</u> 100% public owned company  <u>Passenger</u> 100% public owned company	<u>Regulatory Authority</u> : Regulatory authority (responsible for market monitoring) - State Railway administration (SRA) and the Public Utilities Commission (PUC)  <u>Freight</u> - LDZ Cargo - 100% public - BTS - 100% private - BE - 100% private  <u>Passenger</u> - PV - 100% public - LDZ Cargo - 100% public - GAB - 15% public and 85% private	<u>Regulatory Authority</u> : Institut Luxembourgeois de Régulation  <u>Passenger / Freight</u> - SNCFL  <u>Freight</u> - CFL Cargo S.A.
 <b>Netherlands</b>	 <b>Norway</b>	 <b>Poland</b>
<u>Regulatory Authority</u> : Autoriteit Consument en Markt (ACM)  <u>Freight</u> - DBS 100% public - Captrain 100% public (daughter of SNCF Geodis)  <u>Passenger</u> - NS: 100% public - Arriva: 100% public (daughter DB) - Syntus: 70% public 30% private. Syntus is a holding of Keolis. Keolis is held by 70% SNCF and 30% Caisse de dépôt et de placement du Québec. - Veolia – Transdev: 60% public (CDC), 40% private (Veolia Environment)	<u>Regulatory Authority</u> : The Norwegian Railway Authority  <u>Freight</u> - CargoNet AS (incumbent): 100 % owned by NSB, which is 100 % owned by the state - Cargolink AS: 100 % owned by the private company Autolink - LKAB Malmtrafik AB: 100 % owned by mining company LKAB, which is 100 % owned by the Swedish state - Green Cargo AB: 100 % owned by Swedish state - Hector Rail AB: Privately owned - Tågåkeriet i Bergslagen AB: Private owned - TX Logistik: Owned by TX Logistik AG, which is	<u>Regulatory Authority</u> : Urząd Transportu Kolejowego (UTK) - Office of Rail Transport  <u>Freight</u> - PKP Cargo (33% public) - 57% market share in traffic (tonne-km) - Lotos Kolej (53% public; not from PKP Group) - 9% tkm - CTL Group - 7% tkm - PKP LHS (100% public) – 7% tkm - DB Schenker - 5% t-km - Others (mainly private) – 15% tkm  <u>Passenger</u> - PKP Intercity (100% state-owned; long-distance

<p>- Connexxion : 60% public (CDC) 40% private (Veolia Environment). Connexxion is a holding of Veolia-Transdev.</p>	<p>owned by TrenItalia, which is owned by the Italian state</p> <p>- Grenland Rail AS: Private owned</p> <p><u>Passenger</u></p> <p>- NSB AS (incumbent): 100 % State owned</p> <p>- NSB Gjøvikbanen AS: 100 % owned by NSB AS</p> <p>- Flytoget AS (Airport express train): 100 % owned by the state (but managed by a different ministry than NSB AS)</p> <p>- SJ AB (Swedish incumbent): 100 % owned by the Swedish state</p>	<p>services) – 39% market share in traffic (passenger-km)</p> <p>- Przewozy Regionalne (100% public, owned by regional authorities, regional services) - 30% pas-km</p> <p>- Koleje Mazowieckie (100% public, owned by Mazovia region with Warsaw as capital, services in Mazovia) - 14% pas-km</p> <p>- PKP SKM (PKP Fast Urban Rail in Tricity) (100% public) – 5% pas-km</p> <p>- Others (owned by regional and local authorities) – 11% pas-km Arriva (DB capital) – 1% pas-km</p>
 <p><b>Slovakia</b></p>	 <p><b>Slovenia</b></p>	 <p><b>Spain</b></p>
<p><u>Regulatory Authority</u>: Transport Authority</p> <p><u>Freight</u></p> <p>- ZSSK CARGO (100% public) – 82% market share</p> <p>- Others (private companies) – 18% market share</p> <p><u>Passenger</u></p> <p>- ZSSK (100% public) – 96% market share</p> <p>- RegioJet (private company) – 4% market share</p>	<p><u>Regulatory Authority</u>: AKOS-Agency for Communication Networks and Services of the Republic of Slovenia</p> <p><u>Freight</u></p> <p>- Slovenske železnice-Freight Transport (public),</p> <p>- Rail Cargo Austria (public),</p> <p>- Adria Transport / private (50% Luka Koper : 50% GKB)</p> <p><u>Passenger</u></p> <p>- Slovenske železnice-Passenger Transport (public)</p>	<p><u>Regulatory Authority</u>: CNMC</p> <p><u>Freight</u></p> <p>- Renfe Mercancías (100% public)</p> <p>- Acciona Rail Services</p> <p>- Comsa Rail Transport</p> <p>- Continental Rail</p> <p>- Eco Rail</p> <p>- Ferrovial Railway</p> <p>- Logitren Ferroviaria (38% public ,62% private)</p> <p>- Tracción Rail</p> <p>- Transfesa Rail (20% public, 80% private)</p> <p>- Transítia Rail</p> <p><u>Passenger</u></p> <p>- Renfe Viajeros (100% public)</p>
 <p><b>Sweden</b></p>	 <p><b>Switzerland</b></p>	 <p><b>United Kingdom</b></p>
<p><u>Regulatory Authority</u>: Transportstyrelsen (The Swedish Transport Agency)</p> <p><u>Freight</u></p> <p>- GREEN CARGO AB (owned by the Swedish state)</p>	<p><u>Regulatory Authority</u>: Schiedskommission im Eisenbahnverkehr (Railways Arbitration Commission)</p> <p><u>Freight</u>:</p> <p>- SBB Cargo: 100% SBB (public)</p> <p>- SBB Cargo International: SBB Cargo 75 %;</p>	<p><u>Regulatory Authority</u>: Office of Rail and Road (ORR)</p> <p><u>Freight</u></p> <p>100% private: All freight companies are privately owned. The domestic freight market contains four</p>

<ul style="list-style-type: none"> <li>- TÅGÅKERIET I BERGSLAGEN AB (Private limited liability company)</li> <li>- TÅGFRAKT AB (Private limited liability company, owned by Tågfrakt holding AB)</li> <li>- TX LOGISTIK AB (Private limited liability company, owned by TX Logistik AG, Germany)</li> <li>- RUSHRAIL AB (Private limited liability company, owned by Couplers INC AB)</li> <li>- REAL RAIL AB (Private limited liability company, owned by Sandahlsbolagen sweden AB and CARGO NET AS)</li> <li>- RAILCARE TÅG AB (Private limited liability, owned by Railcare Group AB)</li> <li>- LKAB MALMTRAFIK AB (owned by LUOSSAVAARA-KIIRUNAVAARA AB, which in turn is owned by the Swedish state)</li> <li>- INLANDSTÅGET AB (owned at 100 % by Inlandsbanan AB, which in turn is owned by the municipalities along the Inlandsbanan line.)</li> <li>- HECTOR RAIL AB (private limited liability, owned by ACQUITAS AS (Norway))</li> <li>- DB SCHENKER RAIL SCANDINAVIA A/S CFL CARGO SVERIGE AB (private limited liability, owned by CFL Cargo, Luxembourg)</li> </ul>	<ul style="list-style-type: none"> <li>Hupac 25%</li> <li>- BLS Cargo: BLS AG 97% (public), IMT (Ambrogio Group) 3%</li> <li>- DB Schenker Rail GmbH CH: DB Schenker Rail Germany Deutschland 100%</li> <li>- DB Schenker Germany: DB Schenker Rail GmbH 100%</li> <li>- TX-Logistik GmbH: Trenitalia 100%</li> <li>- Transalpin Eisenbahn Gesellschaft: Captrain Deutschland Cargo West GmbH 100%</li> <li>- Railcare AG: Coop 100% (2nd biggest Swiss Retail undertaking)</li> <li>- Rheinland Cargo AG: HGK Köln AG 50%, Neuss-Düsseldorfer Häfen GmbH 50%</li> <li>- M-Rail: Private 100%</li> <li>- Sersa: Rhomberg Sersa Rail Group 100%</li> <li>- Widmer Rail Services: Private 100%</li> </ul>	<p>major companies, who between them account for approximately 98% of freight traffic, and a number of smaller operators. There is no rail freight in Northern Ireland.</p>
<p><u>Passenger</u></p> <ul style="list-style-type: none"> <li>- Arriva Tåg AB (Is owned at 100 % by Arriva Denmark A/S which in turn is owned by Deutsche Bahn AG.)</li> <li>- A-Train AB (owned at 100 % by MEIF Stockholm AB, which in turn is owned by MEIF Luxembourg Holdings SA, Luxemburg)</li> <li>- Botniatåg AB (owned by 60% by Arriva Östgötapendeln AB the former DB Regio Sverige AB (which is a part of the Deutsche Bahn-group) and 40% by SJ AB.</li> <li>- DSB Uppland AB (owned by DSB Sverige AB, which in turn is owned by the Danish state - The company is a part of the DSB-group (Danske</li> </ul>	<p><u>Passenger (only normal gauge):</u></p> <ul style="list-style-type: none"> <li>- SBB Fernverkehr (long distance): 100% public</li> <li>- SBB Regionalverkehr (regional transport): 100% public</li> <li>- BLS Personenverkehr: Canton of Berne 56%, Swiss State 22%.</li> <li>- Schweizerische Südostbahn (SOB): Swiss State 36%, several Cantons 31%, several Municipalities 18%</li> <li>- Turbo AG: SBB 90%, Canton of Thurgau 10%</li> <li>- TILO: SBB 50%, Trenord 50%</li> <li>- RegionAlps: 70% SBB, 18% TMR, Canton of Valais 12%</li> <li>- Sihltal – Zürich – Uetlibergbahn (SZU): Town of Zurich 33%, Swiss State 28%, Canton of Zurich 24%</li> <li>- Transport Public Fribourgeois (TPF): Canton of Fribourg 75%, Town of Fribourg 16%, SBB 5%</li> <li>- transN (Neuchâtel): Several municipalities</li> </ul>	<ul style="list-style-type: none"> <li>- Colas Rail Limited</li> <li>- DB Schenker Rail (UK) Limited</li> <li>- Direct Rail Service</li> <li>- Freightliner Heavy Haul</li> <li>- Freightliner Intermodal</li> <li>- GB Railfreight</li> <li>- MDS Transmodal Ltd</li> </ul> <p><u>Passenger</u></p> <p>99% private; 1% public: 19 train operating companies operate under a franchise agreement with the Department for Transport, there are four open access operators and one government-owned subsidiary (Northern Ireland).</p> <ul style="list-style-type: none"> <li>- Alliance Rail Holdings</li> <li>- Abellio Scotrail</li> <li>- Arriva plc</li> <li>- Arriva Trains Wales</li> <li>- c2c Rail Limited</li> <li>- Chiltern Railway Company Ltd</li> <li>- CrossCountry</li> <li>- East Coast Main Line Company</li> <li>- East Midlands Trains Limited</li> <li>- First Great Western</li> <li>- First Hull Trains (open access)</li> <li>- First TransPennine Express</li> <li>- Govia Thameslink Railway</li> <li>- Grand Central Railway Company Ltd (open access)</li> <li>- Greater Anglia</li> <li>- London Midland</li> <li>- London Overground Rail Operations Ltd</li> <li>- Mendip Rail Limited</li> </ul>

<p>Statbaner)</p> <ul style="list-style-type: none"> <li>- Inlandståget AB (owned at 100 % by Inlandsbanan AB, which in turn is owned by the municipalities along the Inlandsbanan line.)</li> <li>- SJ AB (owned by Swedish State)</li> <li>- SJ Norrlandståg AB (owned by SJ AB, which in turn is owned by the Swedish state)</li> <li>- SJ Götalandståg AB (owned by SJ AB, which in turn is owned by the Swedish state)</li> <li>- Skandinaviska Jernbanor AB (Private limited liability company)</li> <li>- Stockholmståg KB (owned by SJ AB (68 %) and by SJ Invest AB (32%).</li> <li>- Svenska Tågkompaniet AB (Is owned by Norges Statsbaner (NSB A/S), Norwegian State)</li> <li>- Tågåkeriet i Bergslagen AB (Private limited liability company)</li> <li>- Transdev (former Veolia Transport Sverige AB) (owned by 100 % by Veolia Transport Northern Europe AB which in turn is owned by 100 % by Veolia Transport SA, France.)</li> </ul>	<p>49%, Canton of Neuchâtel 36%, Swiss State 6%</p> <ul style="list-style-type: none"> <li>- travys: Several Municipalities, Canton of Vaud, Swiss State.</li> </ul> <p>+ ~40 players effecting mainly charter traffic or regular/standardized traffic on narrow gauge</p>	<ul style="list-style-type: none"> <li>- Northern Rail Limited</li> <li>- Serco Caledonian</li> <li>- South West Trains</li> <li>- Southeastern</li> <li>- Southern</li> <li>- Venice Simplon Orient Express Ltd</li> <li>- Virgin Trains</li> </ul>
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### 3.3. Route length

Figure 5 -- Correlation between route length and population

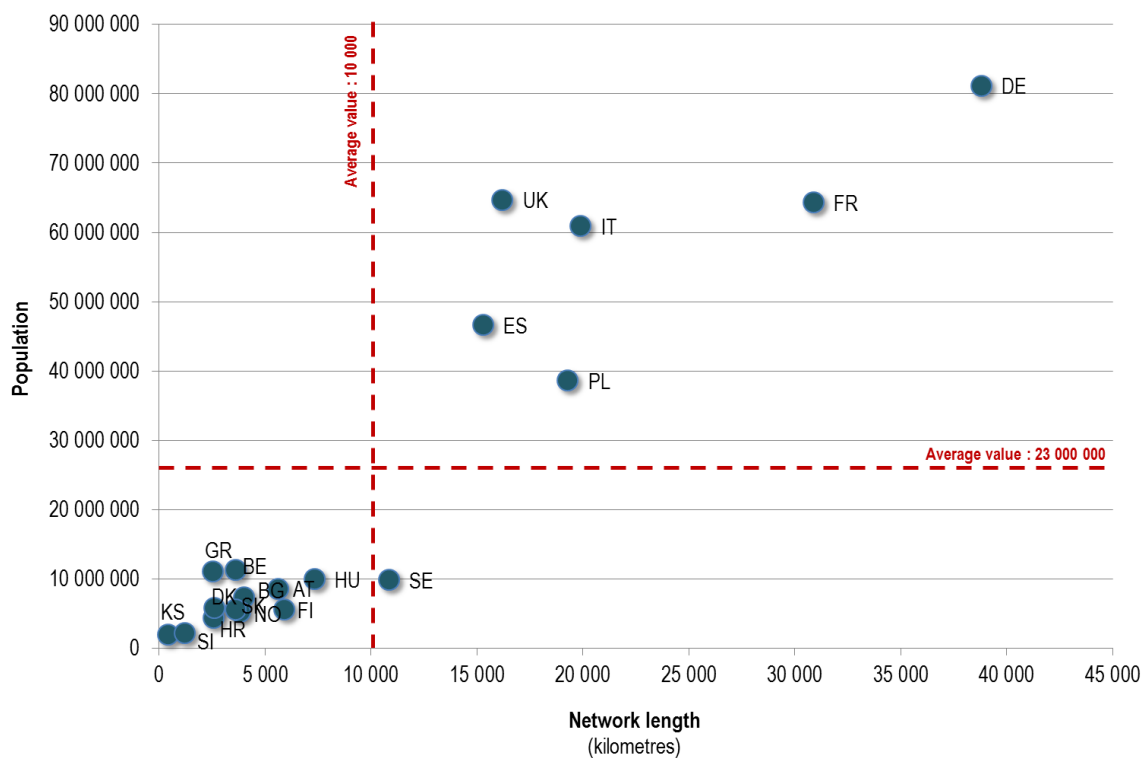
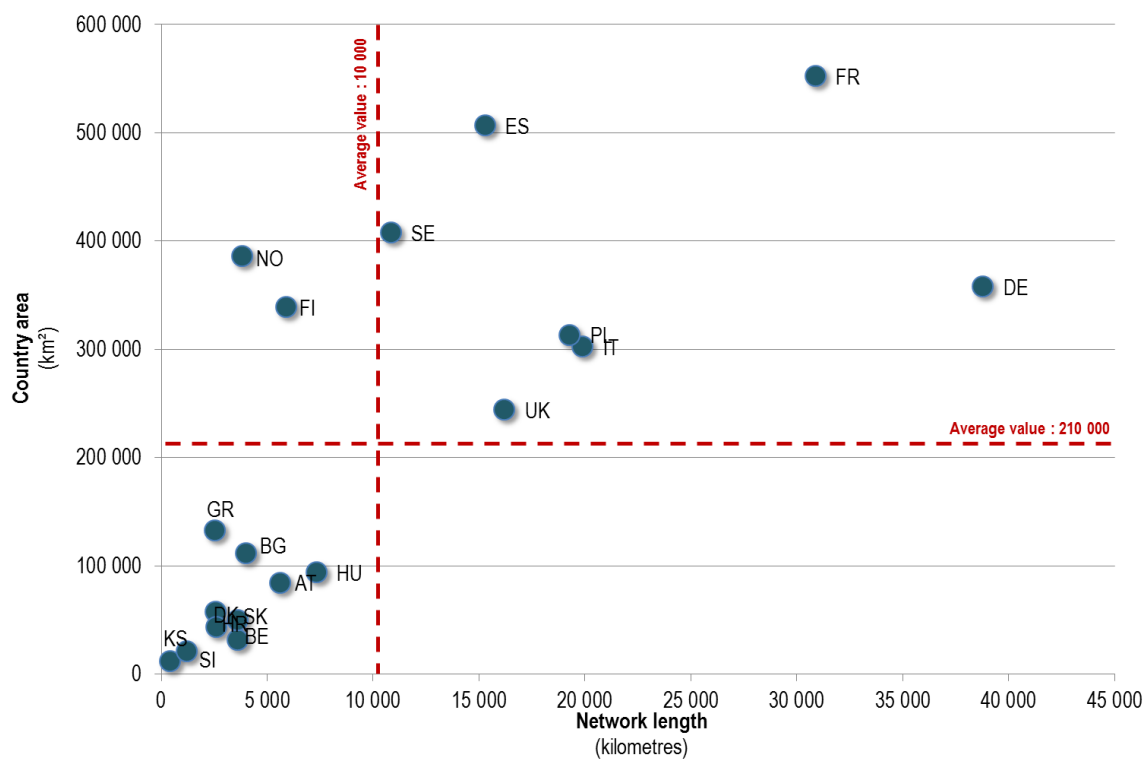


Figure 6 - Correlation between route length and country side



### 3.4. Passenger train kilometres

Figure 7 - Correlation between passenger train.km and population

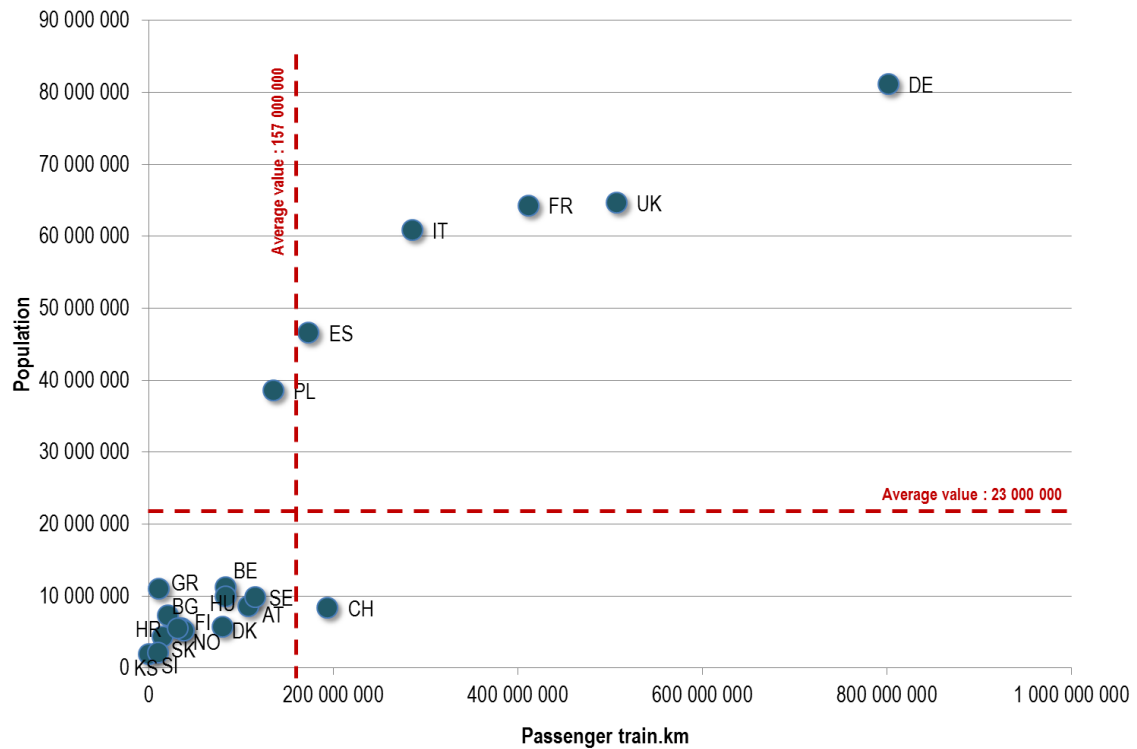
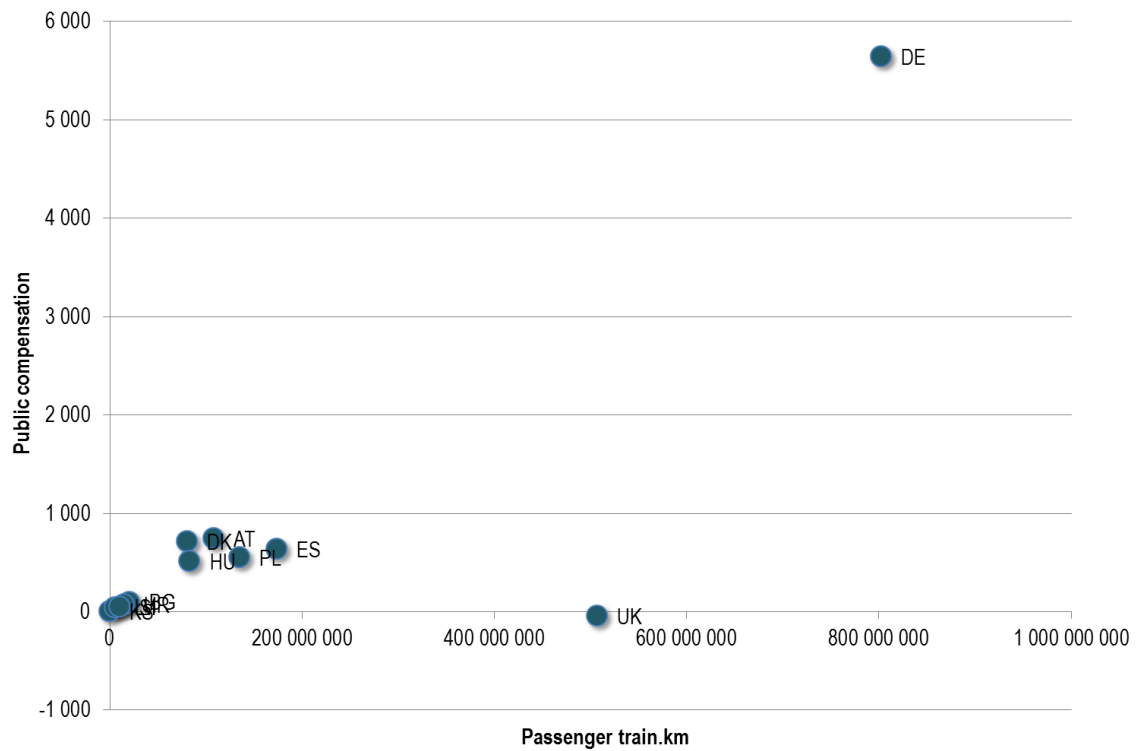


Figure 8 - Correlation between passenger train.km and public compensation






### 3.5. Market development




Figure 9 - Market development



 <p><b>Austria</b></p> <p>In rail freight transport there was a significant recovery in 2014 from the previous year and an all-time high total in tonne-km was reached. The non-incumbent railways increased their market share in transport volume (in tonnes) from 24.9% to 26.2%, and their share in transport performance (net tonne kilometres) rose from 19.3% to 21.4%. Five undertakings totalled market shares between 2% and 5% and the others were in the range of or below 1%.</p> <p>In passenger transport 278 million passengers were carried during the reporting year, representing a further growth compared to 2013. The share of the private railway market rose from 14.5 to 15.5%. The share of private railways in passenger kilometres rose from 11.0 to 11.8%. The Bayerische Oberlandbahn had its first full operating year in Austria in 2014.</p>	 <p><b>Bulgaria</b></p> <p>The only operator on the market of passenger transport services is the incumbent railway undertaking BDZ - Passengers Services Ltd. Due to its difficult financial situation, the company reduced the number of trains, resulting in a decline in passenger traffic compared to the previous two years. The amount of goods transported by private railway undertakings continued to increase, as well as their respective market share, while the market share of the incumbent railway undertaking BDZ Cargo EOOD, showed a progressive decrease.</p>	 <p><b>Croatia</b></p> <p>In Croatia, railway market services are operated by six carriers, five for freight transport (HŽ Cargo Ltd., PPD TRANSPORT Ltd., Rail Cargo Carrier Kft, Rail Cargo Cerier Croatia Ltd. and Rail Transport Service GmbH), and one for passenger transport (HŽ Putnički prijevoz Ltd). Infrastructure manager (HŽ Infrastruktura d.o.o.) is independent company.</p> <p>The railway infrastructure which is not in use is removed from the total length of the infrastructure.</p> <p>In April 2014 the amended timetable came into force with a reduced number of trains. 26 trains were cancelled and 252 trains did not run on weekends. This led to a reduction in transport costs and to business rationalisation of undertakings, but at the same time it was accompanied by a reduction in income from passenger transportation. This was one reason why passenger kilometres reduced compared to the previous year</p>
 <p><b>Denmark</b></p> <p>There were 15 active railway undertakers in 2014. The total incumbent and non-incumbent route length was unchanged.</p> <p>The market shares for freight for non-incumbent undertakings decreased by 15%. The shares of tkm for the incumbent and the non-incumbent railway undertakings were stable between 2013 and 2014.</p> <p>The total number of train km decreased very little</p>	 <p><b>Finland</b></p> <p>VR Training Centers' activities were transferred to the Kouvola Region Vocational College from the beginning of the year 2014. This arrangement supports the fair and non-discriminatory treatment of all operators in the railway sector.</p>	 <p><b>France</b></p> <p>Regarding passenger transport, the overall number of passenger transported decreased slightly due to a two weeks-long strike in June that affected particularly regional and franchised long-distance trains. With regard to alternative operators, Thello, a subsidiary from Trenitalia that already operated a night train between Paris and Venice, opened a new line between Marseille and Milano in December. On this route, it also provided</p>



<p>in 2014 by less than 1%.</p> <p>The national passenger traffic performance was stable and totalled about 6.710 million Pkm. However total freight train kms decreased by 5 percent. The total revenues for compensations increased by 5% in 2014 to 709,4 mio. Euro.</p>		<p>cabotage services on the same route than the franchised trains operated by the incumbent on behalf of the Regional council of Provence-Alpes-Côte d'Azur.</p>
 <p><b>Germany</b></p>	 <p><b>Hungary</b></p>	 <p><b>Italy</b></p>
<p>In 2014 the level of freight transport traffic increased from 113 bn to 114 bn tonne kilometre whilst the regional passenger transport remained at a steady level of 54 bn and the long distance transport decreased from 37 bn to 36 bn passenger kilometres.</p> <p>The market share of competitor in passenger transport was unchanged at a level of 19% in regional passenger transport and less than 1% in long distance passenger transport compared to 2013. The only increase in competitors' market shares was observed in the freight sector which grew from 33% to 34%.</p> <p>The total infrastructure access charges amounted to 5.8 bn. EUR, with 4.6 bn. EUR paid for track access.</p> <p>Since 1 July 2014 there has been a big change in traction charging as DB Energie introduced the new traction-price-system. As a result of this new-price-system and the network access model railway undertaking were allowed to change their traction-supplier. A couple of operators changed their traction-supplier.</p> <p>The employment trend of the railway market reached a low in 2010 with 138.000 full-time-positions. At the end of 2014 there were 145.000 full-time positions, an increase of 7000 full-time positions compared to 2010.</p>	<p>The freight sector experienced a slight growth compared to the previous year both in terms of the weight of goods carried and in tonne.km. International freight transport remained close to the level of 2013 but in national terms the change was quite significant.</p> <p>The regulatory body issued several new licences and one additional foreign railway undertaking started to provide services in Hungary.</p> <p>The change in the passenger market was insignificant - one new market actor emerged. Former urban infrastructural investments, financed from EU funds and national sources, continued. New fleets of urban railcars started the operation, new tram lines were established in local transport and a new metro line was opened in Budapest in 2014.</p>	<p>In 2014 the total passenger-km decreased by 1.2% and total ton-km grew by 5.4%. The incumbent operator has decreased its market share in both the markets of passenger (in terms of pax-km) and freight services (in terms of ton-km).</p>

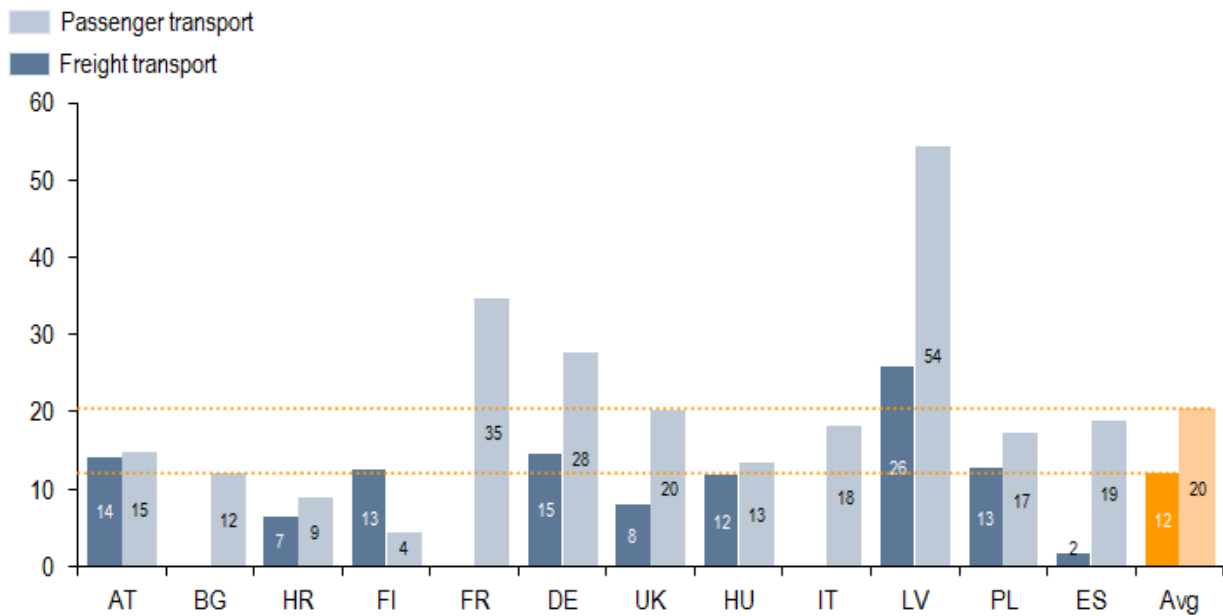
 <b>Kosovo</b>	 <b>Norway</b>	 <b>Poland</b>
<p>The legal framework for the activities of the Market Regulation Department fall under Law 04/L-063 on Kosovo Railway.</p> <p>During 2014 several legal acts were implemented:</p> <ol style="list-style-type: none"> <li>1. Network Statement Regulation No. 01/2013,</li> <li>2. Administrative Instruction No. 02/2013, for calculating direct cost on Railway Infrastructure.</li> <li>3. Administrative Instruction No. 03/2013 defining and establishing how to collect access fees for the use of Rail Infrastructure</li> </ol>	<p>The Ministry of Transport and Communication proposed to transfer the ownership, responsibility and operation of all main inter-modal freight terminals in Norway from the state-owned vertically integrated incumbent operator RailCombi AS/CargoNet AS to the infrastructure manager (Jernbaneverket). The objective is to ensure non-discriminatory access to terminals and services in terminals for all railway undertakings. The change of ownership was implemented in December 2014, with the infrastructure manager agreeing indefinite lease agreements with Rom Eiendom, the incumbent railway undertaking's real estate daughter company. The Ministry of Transport and Communications also proposed that the operations of these freight terminals should be outsourced through competitive tendering processes conducted by the infrastructure manager. The infrastructure manager plans to develop the framework for such tendering during 2015. The regulatory body gave an opinion on the infrastructure manager's draft proposal for the framework in June 2015.</p> <p>The Minister of Transport also announced that the government plans to reform the railway sector in Norway, with an increasing use of competitive tendering of public service contracts being an important element of the reform. The Ministry started a public consultation process in April 2014, stating its ambition to start the tendering process of the first traffic packages before 2017. This led to the Ministry publishing a railway reform government bill in the spring of 2015.</p>	<p><u>Passenger market:</u> The year 2014 brought a minor decrease in the number of passengers (-0,49%) and a bigger decrease in passenger train kms (-4,32%). Train movements fell by 1.8%. Trends in 2014 were similar to the ones during the previous year: long-distance rail lost clients while suburban and regional undertakings managed to attract 1.6% passengers more, mainly in the Warsaw area. Competition from upgraded road infrastructure had a high impact on the results of the national long-distance undertaking PKP Intercity which lost 17% of its passengers last year and already more than 27% during the previous two years. In December some of modernisation works on rail network were completed and the new train from Pendolino family (however without the tilting technology) was introduced.</p> <p>In the regional segment, the biggest Polish undertaking in terms of number of passengers - Przewozy Regionalne - continued to pass on services to undertakings created by regional authorities. Two new ones started operating: first in central Poland and second in Cracow region. Arriva RP (DB company) won a tender for PSO transport in Kuyavia and Pomerania region in December 2013 and almost doubled the number of its passengers in 2014.</p> <p><u>Freight market:</u> Rail freight traffic recorded a slight drop in 2014 in terms of weight of transported cargo (-1.9%) and traffic (-1.6%). Train movements remained stable. Track access charges fell by around 20%. The market situation in 2014 was mainly affected by problems in mining industry as coal constituted around 42% of transported weight and 33% of freight traffic in tonne kms. The demand for coal on international</p>

		<p>markets dropped, which reduced its price and export. PKP Cargo remained the leader on the market, but its share in terms of transport performance fell from 58.9% to 56.7%. At the end of the year, PKP Cargo signed an agreement to acquire 80% of shares of Advanced World Transport, a private undertaking in Czech Republic, operating in Central and Southern Europe. The number of active undertakings grew from 61 in 2013 to 69 in 2014 and the share of non-incumbent undertakings increased from 34% to 36%.</p> <p>As far as inter-modal freight transport is concerned, there was a shift in container structure as smaller and heavier ones dominated.</p>
 <b>Slovakia</b>	 <b>Slovenia</b>	 <b>Spain</b>
<p>The number of railway companies in December 2014 was 43. The freight transport market was divided between 40 railway undertakings. In the field of passenger transport, rail passenger transport services were operated by 3 operators (incumbent operator and new entrants), the majority of services provided under public service contracts.</p>	<p>In early February, bad weather in Slovenia caused severe damage to forests, which also impacted significantly on the rail sector. As a consequence of fallen trees, the railway infrastructure suffered heavy damage, particularly in on the line Ljubljana-Postojna-Port of Koper. This section of track was totally closed for almost two weeks. As the equipment for traction current supply had also suffered extensive damage, trains could be operated only by using diesel locomotives. Under this state of emergency rail freight undertakings undertook to be more effective by establishing cooperation agreements. They agreed to make available all diesel locomotives together with staff in order to provide the necessary traction, irrespective of who the owner of particular train was.</p> <p>To ensure as much as possible the provision of efficient freight transport services to the Port of Koper, passenger service on the most damaged sections on this track were replaced with bus services which impacted negatively on passenger</p>	<p>During 2014 there has been a significant growth in both the rail passenger market and the rail freight market.</p> <p>Regarding the freight market, growth was higher in private companies than in the incumbent railway undertaking. Regarding passenger market, the increase corresponds mainly to high speed journeys motivated primarily to the opening of new lines and to a new pricing policy that was introduced in 2013 and reduced by 10% the prices.</p>

services		
 <b>Sweden</b>	 <b>Switzerland</b>	 <b>United Kingdom</b>
<p>The state-owned companies SJ (passenger transport) and Green Cargo (freight) have a large proportion of the market shares in the passenger- and goods market. There have been no new entrants on the market since the previous period, except for the entry of MTR Express on the line Stockholm-Gothenburg. MTR started its service in March 2015. This is the first time two companies (SJ and MTR) will compete on the same line with similar products.</p>	<p>The Swiss rail network is already intensively used. Nevertheless, in 2014 the entire railways market continued to grow with an increase of 2.0% in train kilometres. The number of passenger journeys on railways reached 576 Million, which is the all-time record and an increase of 6.4% compared to the previous year. With an average of ~2'300 kms the yearly covered distance per person in trains is by far the highest in Europe and in the world. For the first time in history, the total amount of passenger kilometres on rail went over the limit of 20 billion passenger kilometres, which is an increase of 2.9% compared to 2013.</p> <p>Whilst the performance in the passenger market is constantly rising, the development in the freight market is more fluctuating. Nevertheless, compared to 2013 the performance in 2014 increased by 4.6% measured by tonne kilometres (2014: 10.8 billion tkm; 2013: 10.3 billion tkm). With a total amount of 58.9 million net tonnes transported goods in 2014 this figure is nearly on the same level as in 2011.</p>	<p>In 2014 the passenger market continued to grow with an increase of 4.5% in passenger kilometres. The number of passenger journeys in the UK reached 1.68 billion. This is the highest recorded figure since the series began in 2002-3 and an increase of 5% on the previous year.</p> <p>Performance of the freight sector went slightly down with 1.2 decrease in total freight moved which went from 22.4 billion tonne kilometres in 2013 to 22.1 billion tonne kilometres in 2014.</p>

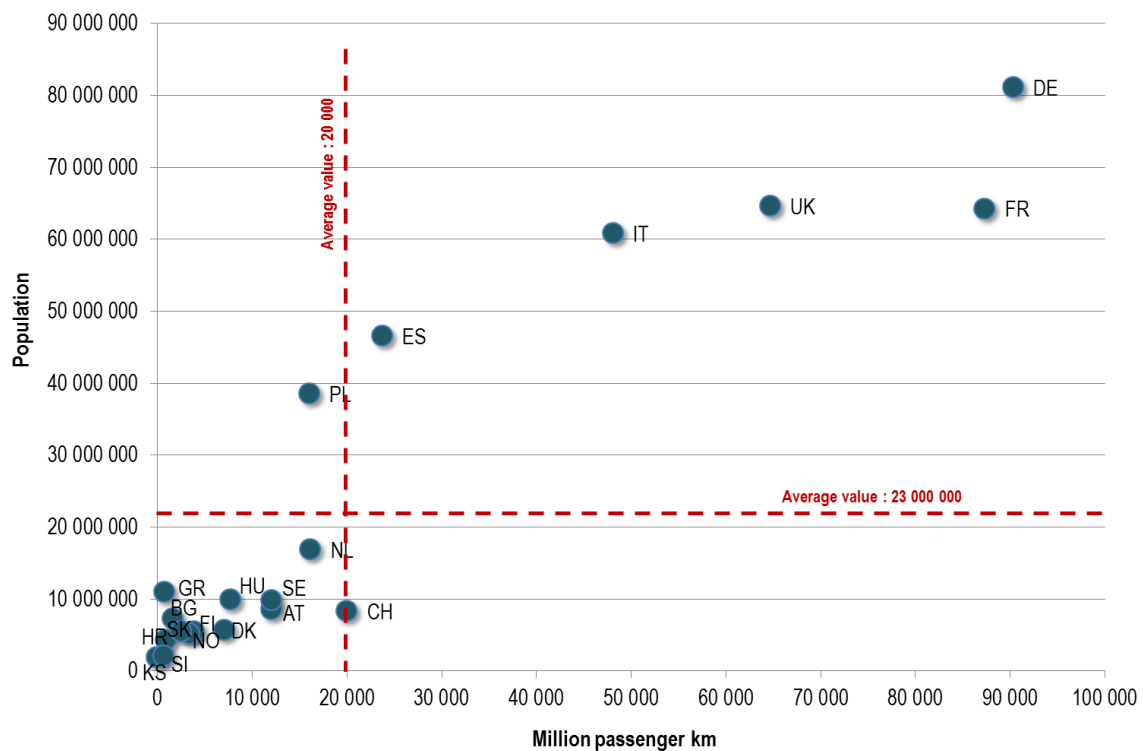
## 4. Annex 4 – Infrastructure

Figure 10 - Share of track access charges received from passenger and freight market segments (%)



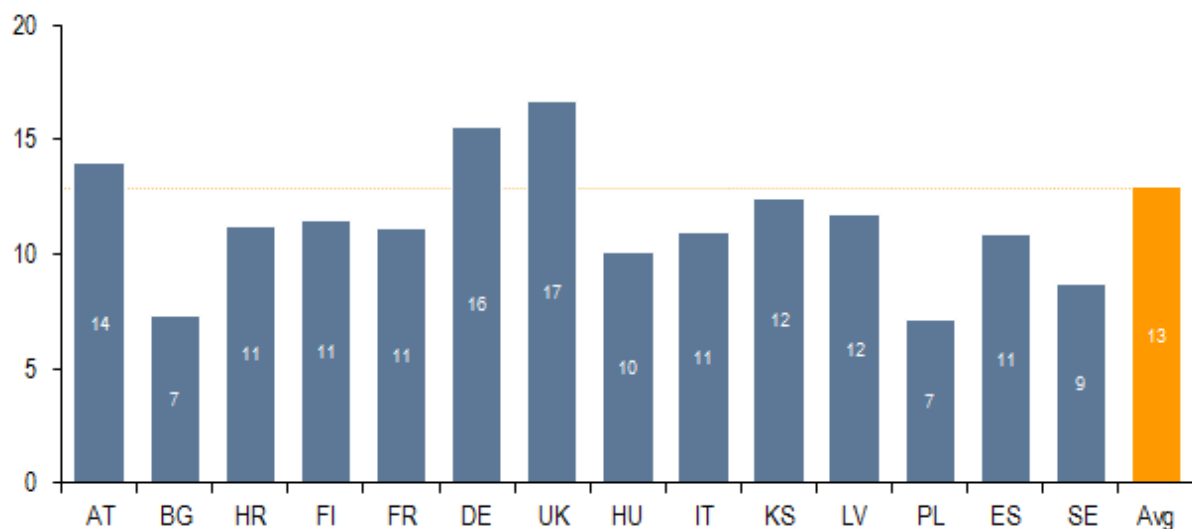
## 5. Annex 5 - Passenger market

Figure 11 - Correlation between passenger kilometres and population



**Figure 12 - Revenue of passenger railway undertakings**

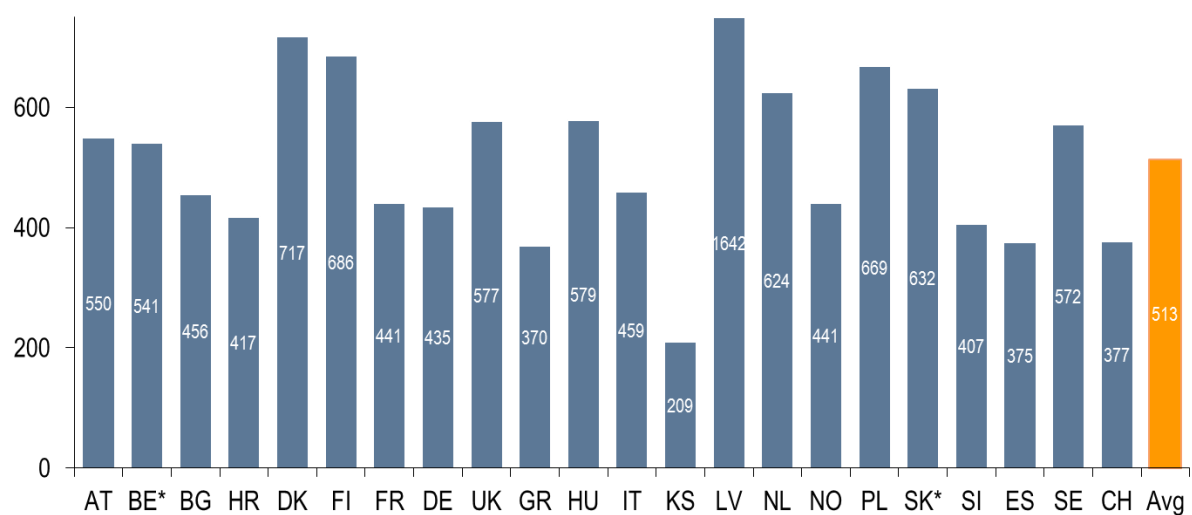
€-Cent per passenger km



## 6. Annex 6 - Freight market

**Figure 13 - Load factor**

Average freight load per train (excluding rolling stock weights) in tonnes



\* calculated from gross tonne kilometres (by using a conversion factor of 2) if net tonne kilometres were not available

## 7. Annex 7 – Service facilities

### 7.1. Passenger stations

Figure 14 - Correlation between total passenger train.km and number of passenger stations

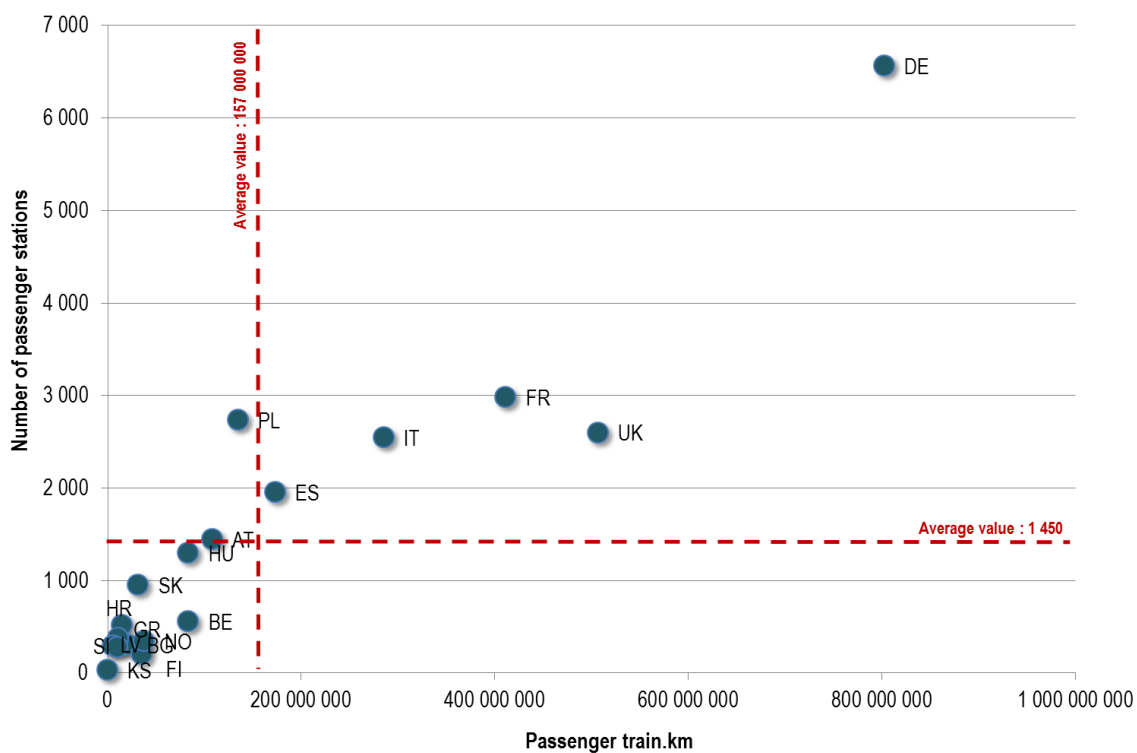
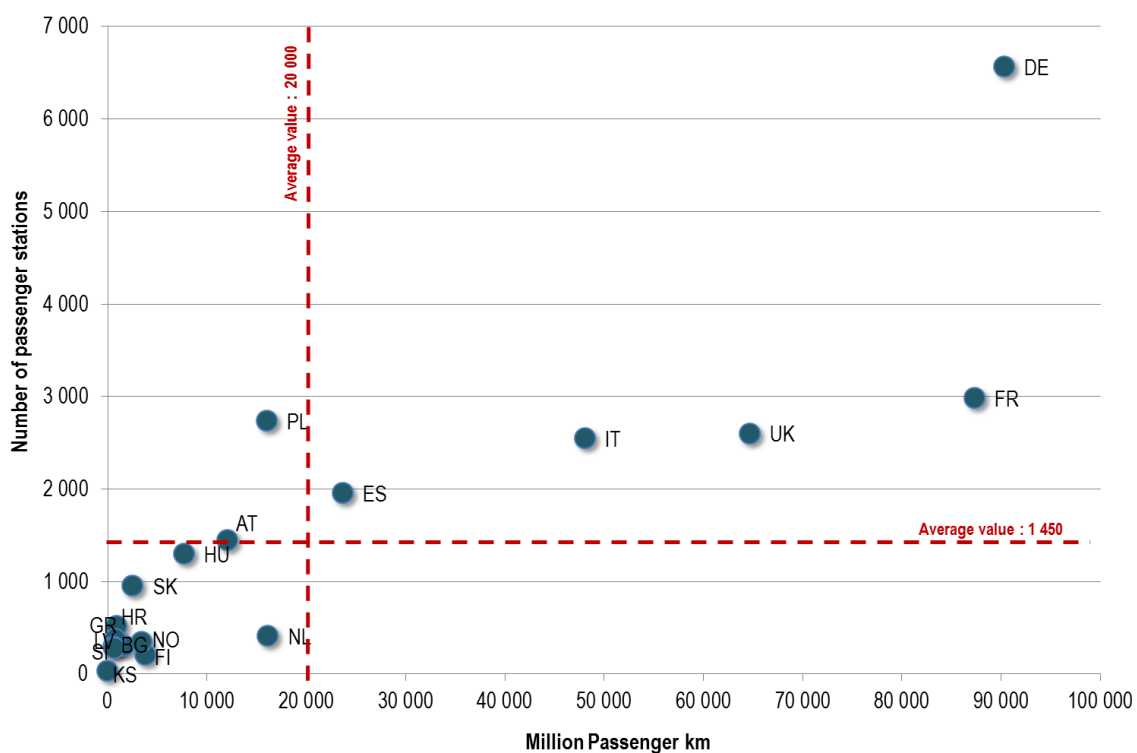
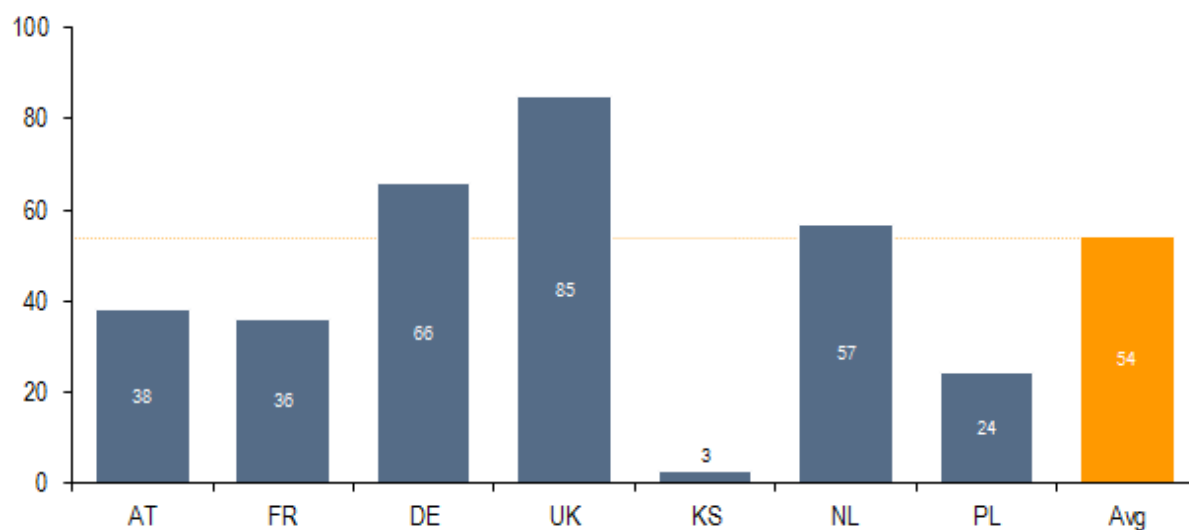


Figure 15 - Correlation between total passenger kilometres and number of passenger stations



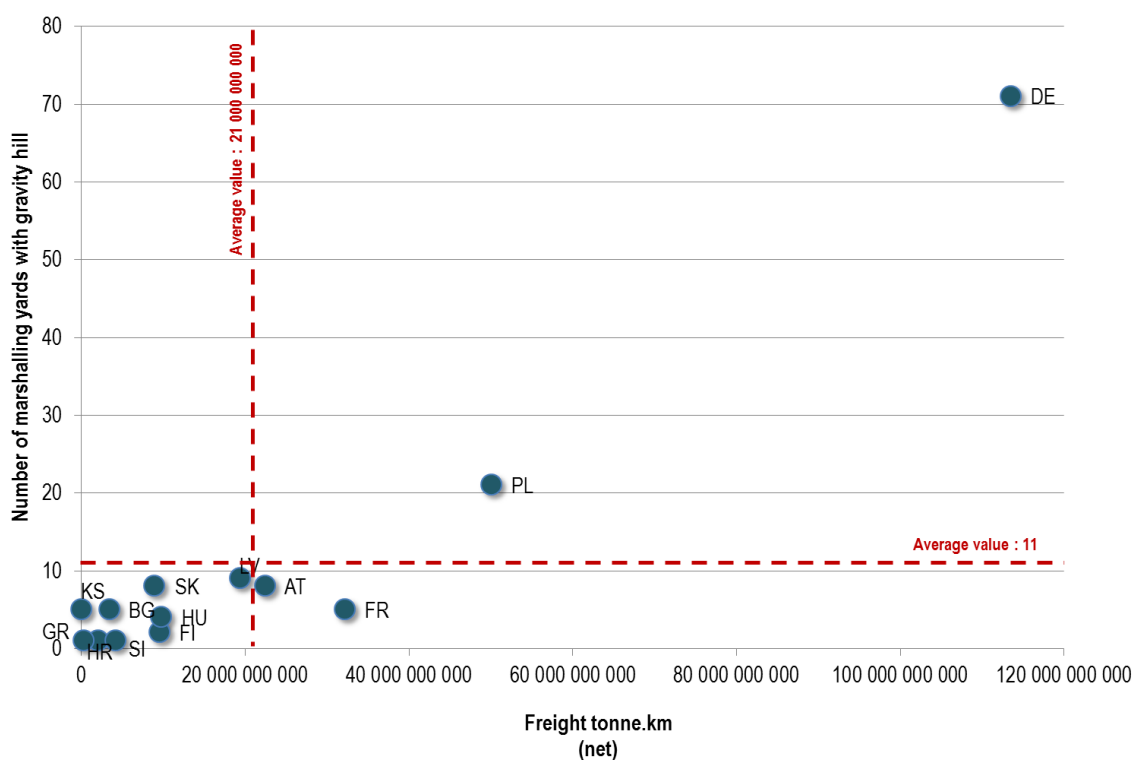
**Figure 16 - Stops at stations per day**

*Number of passenger train stops per day at an average station*



## 7.2. Marshalling yards with gravity hill

**Figure 17 - Correlation between freight tonne.km and number of marshalling yards with gravity hill**





### 7.3. Maintenance facilities

Figure 18 - Correlation between total freight train.km and number of maintenance facilities

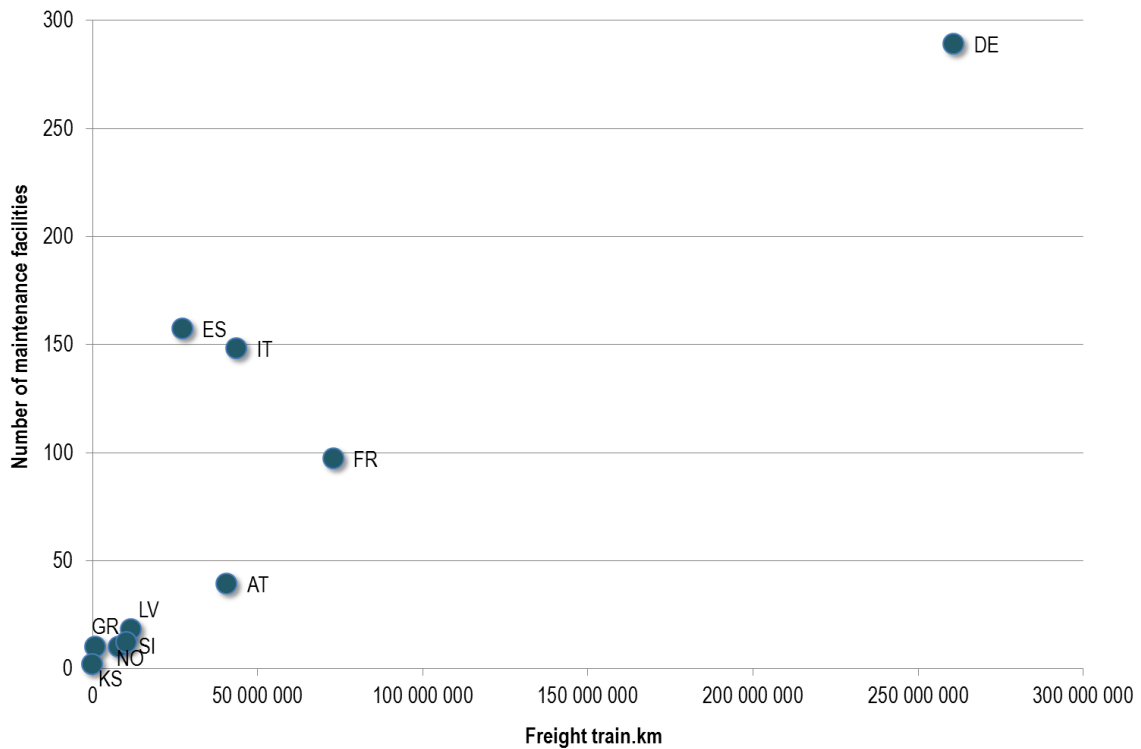
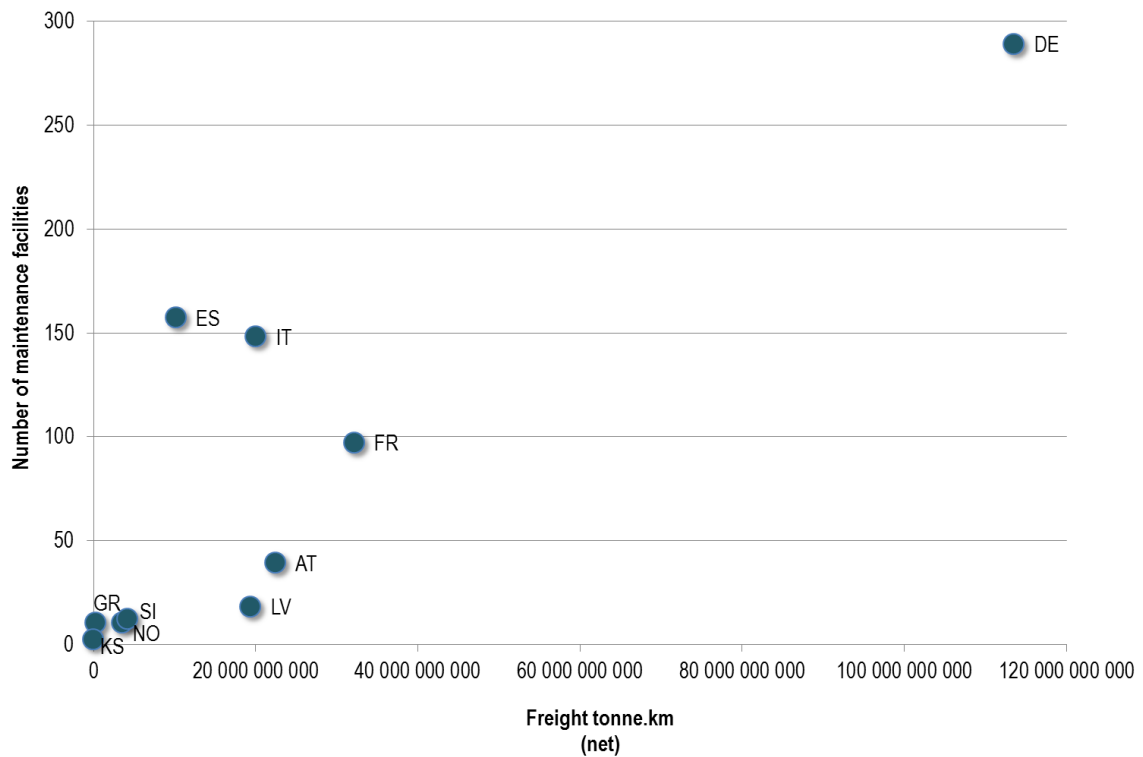
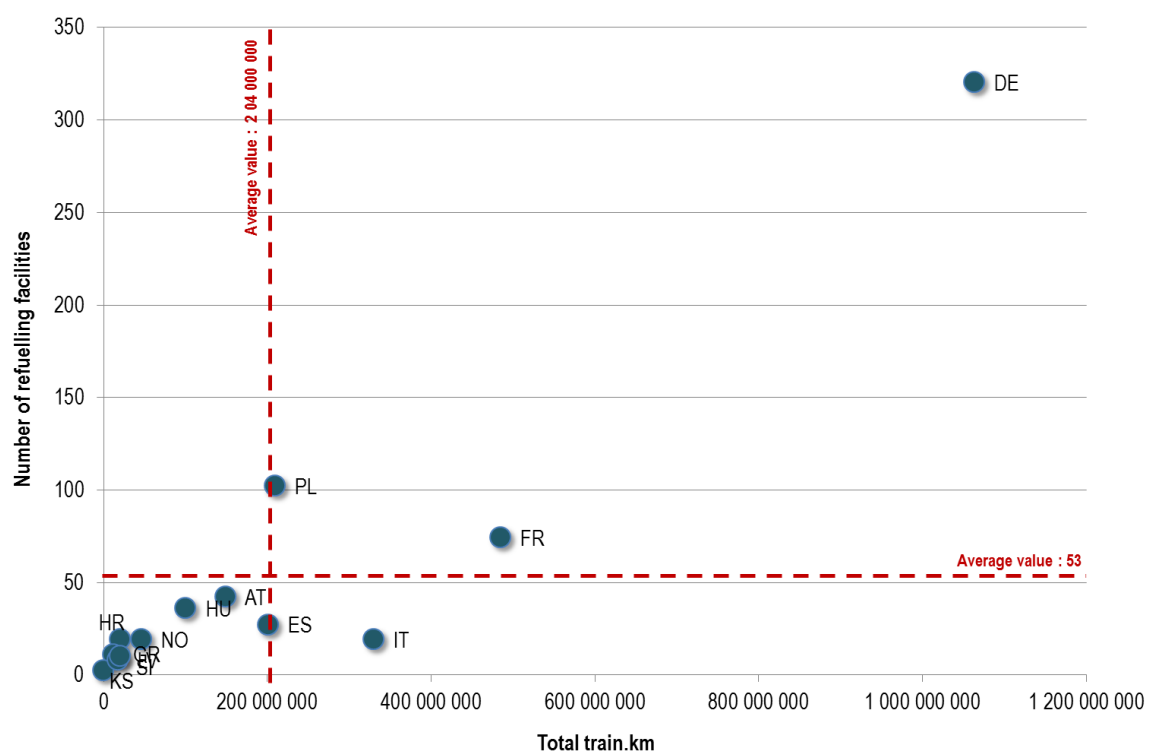


Figure 19 - Correlation between total freight tonne.km and number of maintenance facilities





## 7.4. Refuelling facilities

Figure 20 - Correlation between total train.km and number of refuelling facilities



## 8. Annex 8 – Key regulatory decisions

Figure 21 - Key regulatory decisions in 2014

	<b>Austria</b> <ul style="list-style-type: none"><li>✓ Complaints over use of a maintenance facility: In the appeal to Schienen-Control Kommission a railway undertaking was refused the use of a maintenance facility because the railway undertaking wanted to deploy its own personnel. The enterprise that operated the maintenance facility rejected this request. It wanted to offer its maintenance facility only in combination with the provision of the maintenance services with its own personnel, but not for use of the maintenance facility as such. In connection with verbal negotiations before Schienen-Control Kommission, an agreement could be achieved and the procedure was therefore closed.</li><li>✓ Absence of performance regime-: Schienen-Control Kommission conducted a regulatory procedure since the railway network usage terms of a railway infrastructure undertaking contained no performance-based fee components regime. After being challenged to explain this, the railway infrastructure undertaking declared its willingness to introduce a so-called performance regime. The regulatory procedure could thereafter be closed.</li><li>✓ Improvement of traffic management: A railway undertaking informed Schienen-Control Kommission that it felt discriminated against by the rail infrastructure manager's traffic management system. The rail infrastructure undertaking explained in a statement that poor planning had occurred sporadically and that a continuous improvement process (CIP) was planned to intensify communication in traffic management issues. Schienen-Control Kommission came to the conclusion that there had been no systematic discrimination of the railway undertaking and requested the rail infrastructure manager to report back semi-annually on progress of communication as well as on all other measures which the rail infrastructure manager had taken to improve traffic management.</li></ul>
	<b>Belgium</b> <p>Decision no D-2014-02-S of 19 December 2014 concerning the monitoring mission of a possible transfer of railway infrastructure capacity between NMBS Logistics and DB Schenker Rail Nederland in the framework of the railway accident at Wetteren (text of Decision in Dutch and French only). This decision was published in the Belgian Official Gazette on 14 January 2015.</p> <p>Decision no D-2014-03-S of 17 December 2014 regarding the methodology for attribution of cost by the infrastructure manager Infrabel. (text of decision in Dutch and French only). This decision was published in the Belgian Official Gazette. ADVISE A-2014-02-C on 14 January 2015</p> <p>Advice no A-2014-02-C on the project transport convention regarding the operational cooperation between Infrabel SA and NMBS</p> <p>Advice no A-2014-03-S of 28 July 2014 regarding the proposed modification of the principles of tarification of Infrabel for shunts.</p> <p>Advice no A-2014-05-C of 27 October 2014 regarding the proposal of a template for framework agreement.</p> <p>Advice no A-2014-06-S of 24 October 2014 regarding the Network Statement 2015-2016 submitted by Infrabel.</p>



### Bulgaria

A scheduled inspection on the activities of BDZ - Passenger Services Ltd. was performed by Railway Administration Executive Agency (RAEA) regarding problems in issuing of tickets, lack of information and poor quality of services, poor hygiene conditions and overcrowded trains. After the inspection, an order was issued to address the problems. It required non-performing stations and stops to place at a visible point and in appropriate manner information about the possibilities of purchasing tickets via telephone or internet or on board the train, and on the procedure for such purchase, as well as information on the nearest station with available ticket office, in accordance with art. 9 paragraph 5 of Regulation 1371/2007

A scheduled inspection was performed by RAEA on the activities of the infrastructure manager (NRIC), described in the Network Statement. As a result, an order was issued to eliminate the established irregularities. Currently an inspection relating to the implementation of the order is underway.

A review of BDZ - Passenger Services Ltd. implementation of the rights and obligations of passengers was carried out.



### Croatia

HŽ Passenger transport appealed against the 2015 Network Statement (NS 2015). Complainants were arguing the following: every fact in the Network Statement (NS) 2015 should be proven with certain public documents, there was no transparent use of storage sidings for rolling stock, charges for minimum access package were not legal because there was no decision on charges level and they were not the result of the negotiations and charges for fuel supply were not clear.

HAKOM partially accepted this complaint and as a result annulled the provisions of the NS 2015 regarding refueling facilities and supply of fuel in these facilities because provision of these services had not been transparently described.

HAKOM carried out two ex-officio investigations, both concerning the process of getting a safety certificate and a license. Under the process the railway undertaking had demanded from both monopolistic operators cooperation on test driving, but its request was refused. The problem was related to locomotives which were the condition for delivery of part B of the safety certificate. The railway undertaking decided to rent 2 locomotives from specialized companies which were registered / authorised. This situation was solved and this potential undertaking carried out the test drive and got his safety certificate and license.

HAKOM carried out an enquiry regarding the preparation and publication of Service facility operators' Network statements. According to the Railway Act from the start of the 2015/2016 timetable, certain service facility operators (ports, terminals) were obliged to publish a network statement. Since this was the first time for such publication, HAKOM decided to monitor this process specially. In cases where one entity is responsible for managing a service facility and the other is responsible for supplying services to railway undertakings in that service facility, both entities are obliged to make joint network statement for that service facility. Since the law did not define the content of this special network statement, HAKOM prepared a special form. All service facility operators filled that form and submitted it to HAKOM who also coordinated activity of operators in making NS in the same service facility.



### Denmark

✓ Decision of 3 October 2014 to reject Captrain Sweden's (renewed) application of 19 June 2014 for review of facts of a case on access to shunting operations on the marshalling yard of the combined terminal in Taulov ("JN34-00008b"):

The Board of the Regulatory Body on 21 February 2014 issued a judicial opinion concerning a general prohibition against Captrain Denmark's own shunting operations at the marshalling yard of the combined terminal Taulov (JN34-00008).

The Board of the Regulatory Body also in this case gave further guidance to Captrain in respect of compliance with the earlier judicial opinion, and found in a decision dated 3 October 2014 that Captrain's renewed enquiry and supplementary questions gave no reason to reopen the case. The Board therefore rejected the request for a retrial.

Supervisory measures related to how the incumbent railway company DSB ensured, in practice and generally, adequate separation between the main business areas within the DSB Group where rail transport is carried out as a public service traffic and DSB Group's commercial and competitive lines of business (JN36-00003).

The Board of the Regulatory Body concluded:

- that the DSB management documents specified methods of setting prices for transactions within the Group under the arm's length principle were consistent with the generally accepted methods of determining market prices,
- that the methods for price setting combined with the by DSB established procedures etc. for documentation relating to contracts were sufficient to meet the documentation requirements laid down by the regulatory framework,
- that DSB's procedures with respect to implementing internal controls involving the company's internal trade team, its finance department, the checking of costing etc. were suitable for the support thereof also over extended periods of time.

The Regulatory Body stated that work within the DSB Group still remained outstanding with regard to implementing the principles, procedures and internal controls for internal trade as defined by the management documents. The Board of the Regulatory Railway Board decided that and under existing circumstances, no further action on the matter should be taken.

- ✓ Decision of 28 November 2014 on indexation of infrastructure charges, etc. (JN34-00018):

The background for this case was a previous decision dated 21 October 2013 of the Board of the Danish Regulatory Body repealing the infrastructure manager Banedanmark's charge for rail freight trains ( "tonne kilometre charge" which had been introduced from 1 January 2013), since that charge was not based on calculations of marginal costs. Consequently the Board stated that Banedanmark's collection of tonne kilometre charges from 1 January 2013 had to be replaced by collections of charges in accordance with the previous charging scheme from 2012.

- ✓ Railway Passenger Rights Regulation, article 28:

The Board of the Danish Regulatory Body decided on 25 November 2011 to conduct supervisory measures related to passenger railway undertakings' compliance with article 28 of EU Regulation 1371/2007 of 23 October 2010 (Railway Passenger Rights Regulation), this according to the Danish Railway Act section 24b, and Regulation 1371/2007 Article 30. 7 judicial opinions were issued in 2014.

The decisions taken by the Danish RB are made available online, please see the webpage: [www.jernbanenaevnet.dk](http://www.jernbanenaevnet.dk)



## France

ARAF key decisions in 2014 focused on two main aspects: slot allocation and accounting separation within the incumbent. Decisions related to slot allocation were intended to provide reciprocal incentives for the infrastructure manager and railway undertakings to secure allocated slots. Some freight undertakings in particular complained that timeframe allocated to rail maintenance was often given priority over their slot allocations.



## Germany

Complaints about DG Netz AG's physical works

2014 again saw a number of construction projects on the DB Netz AG's rail network, resulting in a growing number of complaints to the Bundesnetzagentur by access beneficiaries. The complaints tended to focus on deficiencies in the provision of information and inadequate consultation with access beneficiaries, as well as faulty planning resulting in operating processes having to be changed at short notice. The result was as well as a series of proceedings and on-site inspections aimed at clarifying the facts.

#### Staffing problems (signal boxes)

In 2014 the Bundesnetzagentur continued to be concerned with problems related to the staffing of signal boxes and resulting impairments of access to the rail network. The impairments that were due to understaffing at the Mainz Central Station signal box were followed by proceedings which were brought to a successful conclusion once the DB Netz AG's necessary staff qualifications plan had been drawn up and implemented. The notice issued by the Bundesnetzagentur to DB Netz AG on 15 August 2013 became legally valid.

#### Access of freight forwarders to railway infrastructure

DB Netz AG and the largest German transshipment terminal operator, Deutsche Umschlaggesellschaft Schiene Straße mbH (DUSS), which belongs to the DB Group, want in future to conclude usage agreements only with railway undertakings, thus cutting out the shippers.

An arrangement to this effect was prohibited by the Bundesnetzagentur, which regards it as an unacceptable restriction of the shippers' right of access, a right which is expressly granted them under section 14(2) para 2 of the General Railway Act (AEG). The shippers are deprived of an essential basis for implementing their business models reliably and economically if it is not possible for them to make a free choice of the railway undertaking to transport freight by rail. The Federal Administrative Court, as the court of last resort, affirmed the view of the Bundesnetzagentur.



#### Hungary

The regulatory body carried out a procedure on track access agreements: according to national legislation, upon the request of the infrastructure managers, the regulatory body may approve the contracting parties' deviating from the Network Statement in the agreement. The regulatory body carried out ex-officio procedures in the area of capacity allocation: according to Hungarian law, infrastructure managers must request capacity for maintenance work. The regulatory body investigated if the infrastructure manager had complied with that obligation.



#### Italy

With decision n. 70/2014 on 31 October 2014, ART provided rules concerning the equitable and non-discriminatory access to the rail network. In particular new rules regarding:

- 1) framework agreement;
- 2) capacity allocation
- 3) measures in the event of disturbance;
- 4) access to relief facilities;
- 5) penalties for capacity not allocated or not used;
- 6) access charges to the rail infrastructure;
- 7) performance regime;
- 8) access to additional, ancillary and other services to RUs;
- 9) persons with reduced mobility;
- 10) access to the advertising spaces within the railway station under non-discriminatory conditions and affordable tariffs;
- 11) shunting facilities.

On 13 November 2015, ART issued a new regulation on the access charges for the minimum access package for the national infrastructure network and services facilities (Decision 96/2015). As for the latter, it was distinguished between services facility operators with a significant market power, subject to a stricter regulatory regime, and other services facility operators with less regulatory requirements. After a transitional regime, the new access charges will be

applied by the IM from 10 June 2017 to the end of the regulatory period, i.e. 9 December 2021.

Based on Decision n. 61/2015 of 31 July 2015, ART submitted to public consultation a set of measures to define the criteria for determining access charges (fees) for the use of the rail infrastructure so as to connect the charges with the costs and investments net of Government funding, based on principles of transparency, accountability and accounting separation.

These measures concern not only the criteria for determining access charges for the use of the railway infrastructure, both on the conventional network and on high speed/high capacity networks (so-called "Minimum Access Package" services), but also the criteria for setting the charges for RUs' access to other facilities and services, such as those at passenger stations and terminals for freight transport. The consultation period ended on 25 September 2015.



#### **Kosovo**

Railway Regulatory Authority (RRA) and the Market Regulation Department have the task of analyzing and monitoring service quality and competition in the railway sector of Kosovo.

Based on the Law 04/L-063 for Kosovo Railways, Article 61.3 covering the determination of tariffs for railway services, and based on Administrative Instruction No. 02 /2013 for the calculation of direct charges for maintenance of railway infrastructure, and according to Administrative Instruction No. 03 /2013 for setting and collecting the fees, and defining access to railway infrastructure, RRA analysed the draft of the 2015 Network Statement, and in particular chapter 6 detailing the charging system, and the overall level of payments for the use of services provided by the Infrastructure Manager. Based on its formal competences in relation to the draft of the 2015 Network Statement, RRA recommended that concerning the complaint of TRAINKOS against INFRAKOS and based on Chapter 6 of the Network Statement 2015 on the level of fees, "RRA had analyzed the market situation based on the information received and concluded that this draft provided non -competitive fee with the region and did not allow the development of the rail market.



#### **Norway**

In November 2014, the Norwegian regulatory body finished the follow-up of its decision published in December 2013, regarding the complaint made by The Airport Express train about the infrastructure manager's path allocation in 2013. The regulatory body found that the infrastructure manager had complied with the regulatory body's decision, and had included new detailed priority criteria for the dispute resolution system, as outlined in the 2016 Network Statement. From the next allocation process, the infrastructure manager would allocate train paths based on a cost-benefit model intended to maximize the importance to society from the transport. The infrastructure manager had also developed a new capacity plan for the route Oslo S - Lysaker.



#### **Poland**

As far as charges were concerned, the approval decision concerning the charges of the national infrastructure manager PKP PLK took into account the new Polish regulations (The Regulation of the Minister of Infrastructure on Terms of Access and Use of Infrastructure of 16 June 2014). This regulation transposed Directive 2012/34/EC.

The President of UTK made 10 decisions refusing to approve the charges (amongst which 1 concerning the charges of the national infrastructure manager PKP PLK). In these cases, the last approved charges were those applicable.



#### **Slovakia**

In 2014 the office of the regulatory body made no decisions based on a complaint or based on ex-officio procedures.



#### **Slovenia**

Because of restrictions in capacity the Slovenian regulatory body started an ex-officio investigation to establish, whether the infrastructure manager treated all

applicants in a non-discriminatory manner. As the regulatory body did not establish any discrimination of to the infrastructure manager towards operators, no decision was needed.



### Spain

The main decisions taken by CNMC in 2014 were related to:

- i) reporting on Government legislative initiatives on capacity allocation and incentive scheme on access charges;
- ii) reporting on the general approach to the process of domestic passenger traffic liberalisation. In this respect, CNMC provided some guidelines on the most pro-competitive measures that should be taken, and produced a report on the draft Royal Decree to initiate the process in the Madrid-Valencia corridor;
- iii) reporting on the additional services tariffs that mainly highlighted the lack of relevant cost information.



### Switzerland

In 2014 RACO treated two ex-officio investigations. As the cases are still on-going, no decisions have been made yet.

Case 1:

A freight railway undertaking requested RACO to investigate the flat rate tariff for traction-power published in the joint “list of Infrastructure Services” by several infrastructure managers.

Case 2:

A freight railway undertaking requested RACO to investigate a specific case concerning the train path allocation for PostMail trains. The case involves two railway undertakings, an applicant and the Swiss allocation body, which is responsible for the non-discriminatory allocation process.

More details about the two cases are available online in our '[Report on the activities 2014](#)'



### United Kingdom

In May, ORR approved a five-year plan for High Speed 1 (HS1 – high speed line between Channel Tunnel and London), which set out a long term investment programme and a charging framework to run passenger and freight services on the line.

In September 2014 ORR approved an application from Virgin Trains to extend some of its existing services operating between London and the Midlands, to provide direct trains to Shrewsbury and Blackpool from December 2014.

In October, ORR published the conclusion of its investigation of Network Rail's performance against funded obligations between 2009 and 2014 for Scotland, England and Wales. ORR's analysis identified a number of successes, but also found some significant shortfalls in particular in the performance of passenger services and progress of enhancement projects. The 15.5% efficiency savings reported were 8.0 percentage points lower than the 23.5% efficiency savings that Network Rail agreed to deliver. This means that Network Rail now faces a greater challenge to deliver the further 19.4% efficiency savings on operations, maintenance and renewals that the company has been funded to deliver by 2019. National train punctuality was 89.1% (0.7% short of the expected level).

Network Rail also delivered less work than it planned in both maintaining and renewing the network. Network Rail failed to make the expected progress in the early stages of certain enhancements projects and ORR required for an improvement plan to be produced to demonstrate how it would make up for the



delays.

In December 2014 ORR issued a new guidance for train companies on protecting interests of disabled passengers. ORR had conducted a preliminary review of the disabled passenger protection policies, which had raised questions about how policies may be applied in practice and whether they were detailed enough. ORR also launched a review on the rolling leasing market, seeking industry views on a package of remedies that had been introduced following a previous market investigation in 2009 which had identified adverse effects on competition in the market due to key market features such as a shortage of alternative rolling stock available to train operating companies when bidding for franchises. The review concluded in 2015 with no further action needed.

## 9. Annex 9 – Ancillary Services

Figure 22 - Technical Inspection of Rolling Stock



















	<b>Austria</b>		<b>Bulgaria</b>		<b>Croatia</b>
Technical inspection of rolling stock is offered by the IM. However, an increasing number of railway undertakings is using its own staff for technical inspections.		Both the infrastructure manager and the railway undertakings carry out a technical inspection of their own rolling stock.		HŽ Cargo d.o.o. is the only one body carrying out technical inspection of rolling stock.	
	<b>France</b>		<b>Germany</b>		<b>Greece</b>
Technical inspection of rolling stock is a legal obligation for freight undertakings. It aims at ensuring that the rolling stock is safe enough to protect the infrastructure and its load. Inspection must take place before the departure of the train. The incumbent internalises this activity.		Technical inspections can basically be done by every maintenance facility operator as the vehicle owner itself is responsible for the technical safety and compliance of its rolling stock. Maintenance facilities can be certified by EBA (Eisenbahnbundesamt; Federal Rail Authority) confirming compliance with (governmentally defined) minimum standards. For main inspections usually only certified facilities can offer both expertise and adequate technical equipment.		The technical inspection of rolling stock includes: - Inspection of the mechanical parts - checking of the brake system - checking of the composition of rolling stock - checking of loading and weight distribution	
	<b>Hungary</b>		<b>Latvia</b>		<b>Norway</b>
One of the infrastructure managers provides this service. Apart from that, railway undertakings carry out technical inspection of their own trains or require that service from other railway undertakings.		Technical inspection of rolling stock is done by each railway undertaking		Railway undertakings are responsible for technical inspection, and some do it by themselves, while others use maintenance companies. For simple inspection there are several options available, while for more complicated inspections NSB-owned Mantena is the only national provider (the most complicated inspections are performed abroad). The Swedish based companies choose to perform their inspections in Sweden.	
	<b>Slovakia</b>		<b>Slovenia</b>		<b>United Kingdom</b>
Technical inspections are carried out by legal entities authorized by competent authority.		The provider for technical inspection of rolling stock is a dependent company in the holding Slovenske železnice. There were no problems in the past.		Railway undertakings and entities in charge of maintenance are responsible for technical inspection of rolling stock under their safety management arrangements.	

Figure 23 - Ticket Sales at Stations and other Distribution Channels

 <p><b>Austria</b></p> <p>Existing private operators with their own infrastructure only operate train services as part of integrated ticketing organisations. These tickets are sold at all outlets including those of the incumbent. New entrant CAT runs vending machines on station platforms. The new entrant WESTbahn does not sell tickets at stations. Its tickets can be bought on board (no surcharge), via the internet or via tobacco outlets.</p>	 <p><b>Bulgaria</b></p> <p>Ticket sales are carried out by BDZ-Passenger Services Ltd, including on Internet. Other distribution channels are on consignment and by staff of infrastructure manager.</p>	 <p><b>Croatia</b></p> <p>This service is usually provided by HŽ Putnički prijevoz d.o.o., but in some stations and at some stops HŽ Infrastruktura provides this service as an ancillary service.</p>
 <p><b>France</b></p> <p>The majority of ticket selling booths at stations are operated by the incumbent which supplies in particular tickets from the German and Spanish incumbent through a commercial agreement between these undertakings. The only other railway undertaking not related to the incumbent, Thello, has opened booths in Paris and Nice stations. Concerning travel agencies, the French Competition Authority (AdIC) has adopted in 2014 a decision aiming at equalizing access conditions of travel agencies (physical and online) with the online booking service operated by the incumbent (voyages-sncf.com). Three main commitments proposed by the incumbent were acknowledged and made compulsory: equalization of pricing conditions between agencies, safeguard of commercial confidentiality for demands by alternative agencies, and modification of the incumbent's website for the display of time schedule without a need to use the booking service.</p>	 <p><b>Germany</b></p> <p>Ticket sales options for regional traffic depend on the region. Mostly regional linked transport systems define structure and prices. Tickets to other regions are mostly sold by the incumbent; and long-distance traffic tickets are sold nearly completely by the incumbent. Ticket sales carried out by the incumbent are rated poor by the railway undertakings regarding non-discrimination. Ticket sales services are not regulated in Germany.</p>	 <p><b>Hungary</b></p> <p>In stations, tickets for the services of passenger operators can be bought at ticket counters and from ticket machines. The regulatory body has not encountered problems concerning the provision of the necessary locations for such facilities (note that all passenger railway undertakings and infrastructure managers are related companies). Tickets can be also bought online. Online tickets can be printed in stations in ticket machines or at home or they can be presented to the conductor on smartphones. Railway undertakings have ticket offices also outside of the stations (e.g. in some universities) and certain travel agencies sell railway tickets as well.</p>

 <b>Latvia</b>	 <b>Norway</b>	 <b>Poland</b>
<p>Tickets sales done by each railway undertaking.</p>	<p>At Oslo Central Station, and other stations where there are several railway undertakings, each passenger railway undertaking has its own ticket machines. In addition railway undertakings sell tickets through their own websites and apps.</p>	<p>The number of ticket windows at stations fell to 1137. However, the share of ticket windows which accept cards grew from 37% to 52%. As far as mobile ticket machines in trains are concerned, their number grew by 20% to 1946 and the share of those accepting cards grew to 53%. This channel is popular on rail lines without operating ticket windows. The number of stationary ticket machines fell by 18% to 280. Paying with card is possible in 90% of them. Some railways undertakings offer the possibility to buy tickets via a mobile phone, but the share of this channel in total ticket sale is very low, similarly to the internet channel. However, the long-distance operator, PKP Intercity increased the share of internet channel.</p>
 <b>Slovakia</b>	 <b>Slovenia</b>	 <b>United Kingdom</b>
<p>The ticket sales network of incumbent covers the whole area of Slovakia. The sale of tickets of new entrants is provided at sales points of the new entrants.</p>	<p>As there is only one provider (incumbent), no problems have been encountered.</p>	<p>In UK, there is an integrated retailing model which means that passengers are able to buy inter-available tickets (that provide flexibility for using different train operating companies, flows and terminals) and through tickets (that enable travel across the rail network with one rather than multiple tickets). The model also reflects passengers' ability to buy a range of fares from any operator or third party retailer through most sales channels, and at a consistent price regardless of channel or retailer (impartial retailing). In February 2014, ORR launched a review of the rail ticketing market to understand whether arrangements for selling rail tickets were encouraging innovation and competition to the benefit of passengers, and considered how current regulation and industry arrangements and practices were facilitating choice of passengers. In March 2015, the rail industry introduced a new</p>

		code of practice on providing clear and transparent ticket information to passengers. The code sets out how train companies and ticket sellers can meet their obligations and ensure passengers have the right information to make informed decisions; be clear about what type of ticket is available at which sales outlets; and advertise the assistance available for disabled passengers.
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