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**2012 REPORT FROM THE COMMISSION TO THE COUNCIL AND THE
EUROPEAN PARLIAMENT**

ON MONITORING DEVELOPMENT OF THE RAIL MARKET

April 2012

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April 2012

LIST OF ABBREVIATIONS

AT	Austria	LV	Latvia
BE	Belgium	m	million
BG	Bulgaria	NO	Norway
CH	Switzerland	n.a.	not available
CS	Czechoslovakia	NL	Netherlands
CZ	Czech Republic	p	passengers
DE	Germany	p.a.	per annum
DK	Denmark	pkm	passenger-kilometres
EE	Estonia	PL	Poland
EL	Greece	PSO	Public Service Obligations
ES	Spain	PT	Portugal
EU	European Union	q	quarter
FI	Finland	RMMS	Rail Market Monitoring Scheme
FR	France	RO	Romania
GB	United Kingdom	RU	Railway undertaking
HU	Hungary	SE	Sweden
IE	Ireland	SI	Slovenia

IM Infrastructure manager

IT Italy

LT Lithuania

LU Luxembourg

SK Slovakia

t tonnes

tkm tonne-kilometres

UK United Kingdom

LIST OF ANNEXES

- Annex 1:** EU legislation applicable to the railway sector
- Annex 2:** EU current corporate structures of the rail infrastructure managers in the EU Member States
- Annex 3:** Modal split for freight and passenger transport since 1995
- Annex 4:** Evolution of rail transport by Member State, year and market segment (1990-2010)
- Annex 5:** Market shares of railway undertakings (2010)
- Annex 6:** Number of active railway licences
- Annex 7:** Employment
- Annex 8:** Rail infrastructure capacity, railway lines density and intensity of network use 2009
- Annex 9:** Capacity of the high speed rail network (1985-2010)
- Annex 10:** Investments in rail infrastructure
- Annex 11:** Infrastructure charges
- Annex 12:** Compensations of public service operations
- Annex 13:** Multi-annual contracts
- Annex 14:** Frequency and purpose of passengers journeys by rail
- Annex 15:** Satisfaction with railway stations
- Annex 16:** Satisfaction with rail services
- Annex 17:** Safety
- Annex 18:** RMMS questionnaire 2011

ANNEX 1

EU legislation applicable to the railway sector

To date, the European Union has exercised its competence inter alia through the following Union instruments:

ECONOMIC / MARKET ACCESS LEGISLATION

- Regulation No 11 concerning the abolition of discrimination in transport rates and conditions, in implementation of Article 79 (3) of the Treaty establishing the European Economic Community (OJ 52, 16.8.1960, p.1121);
- Council Directive 91/440/EEC of 29 July 1991 on the development of the Community's railways (OJ L 237, 24.8.1991, p. 25);
- Council Directive 95/18/EC of 19 June 1995 on the licensing of railway undertakings (OJ L 143, 27.6.1995, p. 70);
- Directive 2001/12/EC of the European Parliament and of the Council of 26 February 2001 amending Council Directive 91/440/EEC on the development of the Community's railways (OJ L 75, 15.3.2001, p. 1);
- Directive 2001/13/EC of the European Parliament and of the Council of 26 February 2001 amending Council Directive 95/18/EC on the licensing of railway undertakings (OJ L 75, 15.3.2001, p. 26);
- Directive 2001/14/EC of the European Parliament and of the Council of 26 February 2001 on the allocation of railway infrastructure capacity and the levying of charges for the use of railway infrastructure and safety certification (OJ L 75, 15.3.2001, p. 29);
- Directive 2004/51/EC of the European Parliament and of the Council of 29 April 2004 amending Council Directive 91/440/EEC on the development of the Community's railways (OJ L 164, 30.4.2004, p. 164, corrected version in OJ L 220, 21.6.2004, p. 58);
- Regulation (EC) No 1371/2007 of the European Parliament and of the Council of 23 October 2007 on rail passengers' rights and obligations (OJ L 315, 3.12.2007, p. 14);
- Directive 2007/58/EC of the European Parliament and of the Council of 23 October 2007 amending Council Directive 91/440/EEC on the development of the Community's railways and Directive 2001/14/EC on the allocation of railway infrastructure capacity and the levying of charges for the use of railway infrastructure (OJ L 315, 3.12.2007, p. 44);

INTEROPERABILITY AND SAFETY LEGISLATION

- Council Directive 96/48/EC of 23 July 1996 on the interoperability of the trans-European high-speed rail system (OJ L 235, 17.9.1996, p. 6);
- Directive 2001/16/EC of the European Parliament and of the Council of 19 March 2001 on the interoperability of the trans-European conventional rail system (OJ L 110, 20.4.2001, p. 1);
- Directive 2004/49/EC of the European Parliament and of the Council of 29 April 2004 on safety on the Community's railways and amending Council Directive 95/18/EC on the licensing of railway undertakings and Directive 2001/14/EC on the allocation of railway infrastructure capacity and the levying of charges for the use of railway infrastructure and safety certification (OJ L 164, 30.4.2004, p. 44, corrected version in OJ L 220, 21.6.2004, p. 16);
- Directive 2004/50/EC of the European Parliament and of the Council of 29 April 2004 amending Council Directive 96/48/EC on the interoperability of the trans-European high-speed rail system and Directive 2001/16/EC of the European Parliament and of the Council on the interoperability of the trans-European conventional rail system (OJ L 164, 30.4.2004, p. 114, corrected version in OJ L 220, 21.6.2004, p. 40);
- Regulation (EC) No 881/2004 of the European Parliament and of the Council of 29 April 2004 establishing a European Railway Agency (Agency Regulation) (OJ L 164, 30.4.2004, p. 1, corrected version in OJ L 220, 21.6.2004, p. 3);
- Directive 2007/59/EC of the European Parliament and of the Council of 23 October 2007 on the certification of train drivers operating locomotives and trains on the railway system in the Community (OJ L 315, 3.12.2007, p. 51);
- Directive 2008/57/EC of the European Parliament and of the Council of 17 June 2008 on the interoperability of the rail system within the Community (Recast) (OJ L 191, 18.7.2008, p. 1);
- Directive 2008/68/EC of the European Parliament and of the Council of 24 September 2008 on the inland transport of dangerous goods (OJ L 260, 30.9.2008, p. 13);
- Directive 2008/110/EC of the European Parliament and of the Council of 16 December 2008 amending Directive 2004/49/EC on safety on the Community's railways (Railway Safety Directive) (OJ L 345, 23.12.2008, p. 62);
- Regulation (EC) No 1335/2008 of the European Parliament and of the Council of 16 December 2008 amending Regulation (EC) No 881/2004 establishing a European Railway Agency (Agency Regulation) (OJ L 354, 31.12.2008, p. 51);
- Regulation (EU) No 913/2010 of the European Parliament and of the Council of 22 September 2010 concerning a European rail network for competitive freight (OJ L 276, 20.10.2010, p. 22);

PUBLIC SERVICE OBLIGATIONS

– Regulation (EC) No 1370/2007 of the European Parliament and of the Council of 23 October 2007 on public passenger transport services by rail and by road (OJ L 315, 3.12.2007, p. 1).

ANNEX 2

Current corporate structures of the rail infrastructure managers in the EU Member States:

Category	Member States
Fully legally, organisationally and institutionally independent infrastructure manager undertaking capacity allocation	Bulgaria, Czech Republic, Denmark, Great Britain, Greece, Finland, Netherlands, Norway, Portugal, Romania, Spain, Sweden, Slovakia
Integrated infrastructure manager with guarantees of independence in relation to the railway undertaking	Belgium, Latvia
Integrated infrastructure manager working alongside an independent body in charge of capacity allocation	Estonia, Hungary, Lithuania, Luxembourg, Slovenia
Independent infrastructure manager allocating capacity having delegated certain infrastructure management functions (e.g. traffic management, maintenance) to one of the train operating companies	France
Legally (but not institutionally) independent infrastructure manager undertaking capacity allocation owned by a holding company which also owns one of the operators	Austria, Germany, Italy, Poland
Infrastructure manager in charge of allocating capacity and railway undertaking still integrated	Ireland, Northern Ireland

ANNEX 3

Modal split for freight and passenger transport since 1995

3a. EU-27 modal split for freight transport (in %, based on tkm, 1995-2009)

	Road	Rail	Inland Waterways	Pipelines	Sea	Air
1995	42,1	12,6	4,0	3,8	37,5	0,1
1996	42,1	12,7	3,9	3,9	37,5	0,1
1997	42,2	12,8	4,0	3,7	37,3	0,1
1998	42,9	11,9	4,0	3,8	37,4	0,1
1999	43,5	11,4	3,8	3,7	37,6	0,1
2000	43,4	11,5	3,8	3,6	37,5	0,1
2001	43,9	10,9	3,7	3,8	37,6	0,1
2002	44,5	10,6	3,7	3,6	37,6	0,1
2003	44,5	10,7	3,4	3,6	37,7	0,1
2004	45,2	10,8	3,5	3,4	37,0	0,1
2005	45,5	10,5	3,5	3,4	37,0	0,1
2006	45,4	10,8	3,4	3,3	37,0	0,1
2007	45,9	10,9	3,5	3,1	36,7	0,1
2008	46,0	10,8	3,5	3,0	36,6	0,1
2009	46,6	10,0	3,3	3,3	36,8	0,1
2010	45,8	10,2	3,8	3,1	36,9	0,1

3b. EU-27 modal split for passenger transport (in %, based on pkm, 1995-2009)

	Passenger cars	P2W	Bus&Coach	Railway	Tram&Metro	Air	Sea
1995	73,1	2,3	9,4	6,6	1,3	6,5	0,8
1996	73,1	2,3	9,3	6,4	1,3	6,8	0,8
1997	73,1	2,3	9,1	6,3	1,3	7,1	0,8
1998	73,2	2,3	9,1	6,2	1,3	7,2	0,8
1999	73,2	2,3	8,9	6,2	1,3	7,3	0,7
2000	73,0	2,3	8,8	6,3	1,3	7,7	0,7
2001	73,3	2,3	8,7	6,2	1,3	7,5	0,7
2002	73,8	2,3	8,6	6,0	1,3	7,3	0,7
2003	73,7	2,3	8,5	5,9	1,3	7,6	0,7
2004	73,6	2,3	8,3	5,9	1,3	7,9	0,7
2005	73,0	2,4	8,3	6,0	1,3	8,4	0,6
2006	73,0	2,4	8,0	6,1	1,3	8,6	0,6
2007	72,8	2,3	8,1	6,1	1,3	8,8	0,6
2008	72,7	2,4	8,1	6,3	1,4	8,6	0,6
2009	73,5	2,4	7,8	6,2	1,4	8,0	0,6
2010	73,7	1,9	7,9	6,3	1,4	8,2	0,6

Notes for tables 3a and 3b:

P2w: Powered 2-wheelers

Road: national and international haulage by vehicles registered in the EU-27

Source: EU Transport in Figures, Statistical Pocketbook 2011, tables 2.2.2 and 2.3.2.

3c. Share of rail in inland freight transport market in EU-27 (in %, based on tkm)

	1995	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
EU-27	20,2	18,5	17,5	17,1	17,3	17,2	16,7	17,2	17,2	17,1	15,8

Source: EU Transport in Figures, Statistical Pocketbook 2011, table 2.2.3

ANNEX 4

Evolution of rail transport by Member State, year and market segment (1990-2010)

Note 1: International transport includes transit

Note 2: Unlike most other annexes which give priority to the Eurostat figures, this annex presents in the first place data submitted by the national authorities in the framework of the 2011 RMMS questionnaire. There is a certain discrepancy between the Eurostat data and data provided by the national Ministries responsible for transport.

RMMS data for UK do not cover Northern Ireland.

Note 3: for Spain, for the period 1990-2005, the data include also traffic of regional rail companies and the source used is not RMMS questionnaire.

AT

		1990	1995	2000	2005	2007	2008	2009	2010
Freight transport	National (m tkm)	33189	3005	3893	4494	5045	5933	5300	5800
	International (m tkm)	8823	10155	12709	14463	15591	11326	12400	14000
Passenger transport	National (m pkm)				6895	7262	7403	n.a.	n.a.
	International (m pkm)				1749	1841	1877	n.a.	n.a.
	Of which under PSO (m pkm)					6305	6428	n.a.	n.a.

BE

		1990	1995	2000	2005	2007	2008	2009	2010
Freight transport	National (m tkm)	2631	2232	2030	2353	2330	2220	1675	1779
	International (m tkm)	5723	5055	5644	5777	5818	5662	3764	3950
Passenger transport	National (m pkm)	5592	5785	6317	7771	8547	8913	9005	9231
	International (m pkm)	948	972	1415	1379	1386	1491	1488	1379
	Of which under PSO (m pkm)					8442	8902	8992	9225

BG

		1990	1995	2000	2005	2007	2008	2009	2010
Freight transport	National (m tkm)	14132	8595	5538	5168	3893	3336	2228	2218
	International (m tkm)			1034	1281	1348	1358	919	964
Passenger transport	National (m pkm)	7793	4693	3472	2388	2238	2264	2089	2045
	International (m pkm)				60	86	n.a.	55	55
	Of which under PSO (m pkm)				334	2040	1972	1807	1740

CZ

		1990	1995	2000	2005	2007	2008	2009	2010
Freight transport	National (m tkm)	n.a.	10330	7399	6222	7267	6510	5485	5714
	International (m tkm)	n.a.	12293	10097	8644	9037	8927	7307	8056
Passenger transport	National (m pkm)	n.a.	7602	6681	6285	6536	6324	6133	6263
	International (m pkm)	n.a.	403	619	381	364	479	371	328
	Of which under PSO (m pkm)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

DE

		1990	1995	2000	2005	2007	2008	2009	2010
Freight transport	National (m tkm)		40100	36500	44400	53784	55928	48667	54529
	International (m tkm)		30400	41000	51000	60826	59724	47167	52787
Passenger transport	National (m pkm)	44600	70977	75404	74946	75516	76909	76583	78515
	International (m pkm)					3587	3856	4349	4538
	Of which under PSO (m pkm)	27400	36277	36226	33695	n.a.	n.a.	n.a.	n.a.

DK

		1990	1995	2000	2005	2007	2008	2009	2010
Freight transport	National (m tkm)				420	146	134	123	167
	International (m tkm)				1556	1633	1814	1576	2075
Passenger transport	National (m pkm)				5421	5915	5983	5999	6200
	International (m pkm)				330	438	488	n.a.	n.a.
	Of which under PSO (m pkm)					6176	6275	6174	6347

EE

		1990	1995	2000	2005	2007	2008	2009	2010
Freight transport	National (m tkm)	6976	760	800	737	858	775	584	724
	International (m tkm)		3091	7386	9892	7567	5186	5349	5917
Passenger transport	National (m pkm)	1510	421	261	248	246	245	232	229
	International (m pkm)							17	18
	Of which under PSO (m pkm)	1510	421	261	248	246	245	232	229

EL

		1990	1995	2000	2005	2007	2008	2009	2010
Freight transport	National (m tkm)		159	116	149	193	205	128	n.a.
	International (m tkm)		147	310	464	642	580	411	n.a.
Passenger transport	National (m pkm)		1513	1608	1804	1852	1599	1296	n.a.
	International (m pkm)		55	21	50	77	59	47	n.a.
	Of which under PSO (m pkm)					0	0	n.a.	n.a.

ES

		1990	1995	2000	2005	2007	2008	2009	2010
Freight transport	National (m tkm)	9935	9037	10536	8918	8763	8225	5864	6370
	International (m tkm)	1271	1040	1085	2153	1784	1513	1109	1047
Passenger transport	National (m pkm)	14992	14834	18035	19155	19348	21461	21184	20421
	International (m pkm)	484	479	536	653	618	611	516	557
	Of which under PSO (m pkm)	9538	8206	9596	8617	11500	11581	10912	10555

FI

		1990	1995	2000	2005	2007	2008	2009	2010
Freight transport	National (m tkm)	5944	5936	6802	6607	7581	7588	6141	6915
	International (m tkm)	2413	3357	3305	3099	2852	3189	2731	2835
Passenger transport	National (m pkm)	3254	3133	3345	3401	3675	3940	3785	3869
	International (m pkm)	77	51	60	76	103	112	91	90
	Of which under PSO (m pkm)					1350	n.a.	n.a.	n.a.

FR

		1990	1995	2000	2005	2007	2008	2009	2010
Freight transport	National (m tkm)	31520	26330	29900	21640	25200	26200	23200	22500
	International (m tkm)	15010	14410	18490	13890	17500	14500	9600	7600
Passenger transport	National (m pkm)	73900	64500	80700	88900	72800	77000	n.a.	n.a.
	International (m pkm)					7500	8000	n.a.	n.a.
	Of which under PSO (m pkm)	6100	6800	8500	10200	22500	24100	24300	24400

HU

		1990	1995	2000	2005	2007	2008	2009	2010
Freight transport	National (m tkm)		2554	1984	1645	1289	1374	1269	1330
	International (m tkm)		5868	6111	7445	8848	8499	6404	7460
Passenger transport	National (m pkm)	11403	8441	9693	9880	8379	7923	7681	7316
	International (m pkm)	486	334	387	403	372	381	391	376
	Of which under PSO (m pkm)	11403	8441	9693	9880	8379	7923	7681	7316

IE

		1990	1995	2000	2005	2007	2008	2009	2010
Freight transport	National (m tkm)	589	602	491	303	129	103	79	92
	International (m tkm)	56	43	22	n.a.	n.a.	n.a.	n.a.	n.a.
Passenger transport	National (m pkm)				1564	1902	1876	1604	1582
	International (m pkm)				127	105	100	79	96
	Of which under PSO (m pkm)					2007	1976	1683	1678

IT

		1990	1995	2000	2005	2007	2008	2009	2010
Freight transport	National (m tkm)	8142	9616	11787	11854	n.a.	12791	8726	7519
	International (m tkm)	11258	12073	11027	8276	n.a.	9190	6497	5885
Passenger transport	National (m pkm)			44308	43889	n.a.	n.a.	n.a.	43348
	International (m pkm)			2825	2255	n.a.	n.a.	n.a.	
	Of which under PSO (m pkm)			408	444	n.a.	22180	22168	22711

LT

		1990	1995	2000	2005	2007	2008	2009	2010
Freight transport	National (m tkm)		829	1144	3425	2959	3655	3090	3376
	International (m tkm)		6391	7774	9033	11414	11093	8798	10055
Passenger transport	National (m pkm)	1521	746	335	259	223	235	213	226
	International (m pkm)	2119	384	276	169	186	162	144	147
	Of which under PSO (m pkm)					223	235	n.a.	n.a.

LU

		1990	1995	2000	2005	2007	2008	2009	2010
Freight transport	National (m tkm)	112	83	111	75	74	69	43	50
	International (m tkm)	597	483	572	345	219	445	550	689
Passenger transport	National (m pkm)				254	233	246	239	246
	International (m pkm)				18	84	99	n.a.	103
	Of which under PSO (m pkm)				51	302	328	316	343

LV

		1990	1995	2000	2005	2007	2008	2009	2010
Freight transport	National (m tkm)		558	352	509	375	334	257	291
	International (m tkm)		9199	12958	19270	17929	19243	18467	16887
Passenger transport	National (m pkm)	3327	779	568	800	889	865	686	670
	International (m pkm)	2039	477	147	94	102	86	70	79
	Of which under PSO (m pkm)				800	889	865	686	670

NL

		1990	1995	2000	2005	2007	2008	2009	2010
Freight transport	National (m tkm)	1019	721	1033	1073	1195	1059	941	950
	International (m tkm)	2049	2295	3577	4841	6021	5925	4635	5435
Passenger transport	National (m pkm)	n.a.	13500	14700	14752	15634	15895	15927	16002
	International (m pkm)	n.a.	n.a.	n.a.	231	254	275	920	966
	Of which under PSO (m pkm)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

PL

		1990	1995	2000	2005	2007	2008	2009	2010
Freight transport	National (m tkm)	59604	43573	33230	25377	29948	29101	28563	27941
	International (m tkm)	23926	25543	21218	24287	23975	22469	15038	21014
Passenger transport	National (m pkm)	49683	26346	23844	17109	18772	19628	18243	17918
	International (m pkm)	690	289	248	706	529	489	449	530
	Of which under PSO (m pkm)	50373	26635	24092	14448	15895	16196	15316	13645

PT

		1990	1995	2000	2005	2007	2008	2009	2010
Freight transport	National (m tkm)				2131	2309	2342	1972	2095
	International (m tkm)				291	278	208	183	389
Passenger transport	National (m pkm)				3753	3933	4085	4049	4008
	International (m pkm)				57	55	120	103	103
	Of which under PSO (m pkm)					2799	2833	2391	2365

RO

		1990	1995	2000	2005	2007	2008	2009	2010
Freight transport	National (m tkm)	34764	17907	10757	9341	12075	11821	9530	10345
	International (m tkm)	14147	6313	5673	3601	3682	3415	1557	2029
Passenger transport	National (m pkm)	29417	19928	11384	7816	7329	6805	5995	5308
	International (m pkm)	1164	197	247	144	146	152	133	129
	Of which under PSO (m pkm)	29417	19928	11384	7816	7476	6958	n.a.	n.a.

SE

		1990	1995	2000	2005	2007	2008	2009	2010
Freight transport	National (m tkm)	10445	10823	11999	14124	15681	15975	13176	14828
	International (m tkm)	8312	8098	7668	7550	7569	7141	7212**	8634**
Passenger transport	National (m pkm)	5946	6271	7706	8338	9771	10462	10706	10674
	International (m pkm)	654	562	537	598	499	555	615	544
	Of which under PSO (m pkm)	2448	3098	3386	3992	4601	4763	5298	n.a.

SI

		1990	1995	2000	2005	2007	2008	2009	2010
Freight transport	National (m tkm)	1683	512	571	620	671	303	247	263
	International (m tkm)	2525	2563	2285	2625	2932	3570	2957	3649
Passenger transport	National (m pkm)	1166	491	593	666	690	713	718	680
	International (m pkm)	263	104	112	111	122	121	n.a.	n.a.
	Of which under PSO (m pkm)	1166	491	593	666	689	711	822	792

SK

		1990	1995	2000	2005	2007	2008	2009	2010
Freight transport	National (m tkm)				1229	1089	940	700	762
	International (m tkm)						11995	8239	9721
Passenger transport	National (m pkm)					1953	2077	n.a.	n.a.
	International (m pkm)			179	143	195	202	n.a.	n.a.
	Of which under PSO (m pkm)			2741	2023	2148	2279	n.a.	n.a.

UK

		1990	1995	2000	2005	2007	2008	2009	2010
Freight transport	National (m tkm)	16000	13300	17910	20953	20904	20641	18742	18169
	International (m tkm)			990	474	361	436	429	408
Passenger transport	National (m pkm)	32000	30000	39002	43157	48878	51348	51123	54111
	International (m pkm)				1485	1595	1654	1641	1720
	Of which under PSO (m pkm)				42977	48635	51017	50738	53630

NO

		2007	2008	2009	2010
Freight transport	National (m tkm)		2670	2804	2115
	International (m tkm)	1002	956	862	1047
Passenger transport	National (m pkm)	2895	3047	3011	3023
	International (m pkm)	61	67	69	72
	Of which under PSO (m pkm)	2156	2237	2204	n.a.

Source: RMMS questionnaires filled in by Member States, national Ministries responsible for transport, Eurostat data, railway undertakings DB, FS and the Association of Train Operating Companies (ATOC)

*For 2010, this figure doesn't take into account data from Eurostar

** From 2009 data for freight transport include transit from Norway to Norway

ANNEX 5

Market shares of railway undertakings (2010)

5a. Rail freight transport (market shares in tonnes-kilometres)

	Railway undertakings	Market share (%)	Total market share of all but the principal railway undertakings
AT	ÖBB RCA	85,4	14,6
	Wiener Lokalbahn Cargo	3,5	
	Lokomotion	3,0	
	LTE	2,6	
	Logserv	2,4	
	TX Logistik Austria	2,1	
BE	SNCB/NMBS (B-Cargo)	88,18	11,82
	Crossrail Benelux N.V.	6,28	
	SNCF-Fret	3,74	
	Trainsport AG	1,19	
	Veolia Cargo Nederland B.V. (Rail4Chem)	0,23	
	DB Schenker Rail Nederland N.V.	0,01	
BG	BDZ EAD	78,38	21,6
	BRC AD	16,25	
	Bulmarket DM Ltd	2,71	
	Real Kargo Austria	0,01	
	DB Schenker Rail Bulgaria EOOD	2,65	

	Railway undertakings	Market share (%)	Total market share of all but the principal railway undertakings
CZ	ČD Cargo	86.84	13,16
	Advanced World Transport	5.63	
	Unipetrol Doprava	3.62	
	České dráhy	0.89	
	Ostravská dopravní společnost	0.73	
	PKP Cargo Spolka Akcyjna	0.42	
	Traťová strojní společnost	0.37	
	BF Logistics	0.29	
	LTE Logistik a Transport Czechia	0.20	
	Sokolovská uhelná, právní nástupce	0.13	
DE	Deutsche Bahn AG	75	25
	Other railway undertakings	25	
DK	DB Schenker Rail Denmark Services A/S Taastrup Denmark	75	25
	CFL Cargo Aps: Padborg Denmark	2	
	Hector Rail: Danderyd, Sweden	23	
EE	ERS	55	45
	EVR Cargo	45	
EL	OSE	n.a.	n.a.

	Railway undertakings	Market share (%)	Total market share of all but the principal railway undertakings
ES	RENFE-OPERADORA	91,92	8,08
	COMSA	3,25	
	CONTINENTAL	2,01	
	EWS	1,99	
	Other railway undertakings	0,83	
FI	VR Group Ltd.	100	0
FR	SNCF	80	20
	Other railway undertakings	20	
HU	Rail Cargo Hungaria Zrt (private)	80,53	19,47
	GySEV Zrt (public)	6,34	
	CER Zrt (private)	4,59	
	MMV Magyar Maganvasut Zrt (private)	2,97	
	AWT Rail HU Zrt. (private)	1,44	
	Floyd Zrt. (private)	1,43	
IE	Iarnrod Eireann	100	0
IT	Trenitalia	75.9	24.1
	New entrants	24.1	
LT	JSC Lithuanian Railways	100	0
LU	CFL Cargo	100	0
LV	SIA LDz Cargo	76,7	23,3
	AS BTS	16,63	
	AS BE	6,67	

	Railway undertakings	Market share (%)	Total market share of all but the principal railway undertakings
NL	DB Schenker Rail Nederland BV	Ca 60	40
	Other railway undertakings	Ca 40	
PL	PKP Cargo S.A.	64,40	35,82
	Lotos Kolej sp. z o.o.	6,98	
	DB Schenker RailPolska SA	6,54	
	PKP LHS sp. z o.o.	5,60	
	CTL Logistics Sp. Zo.o.	5,30	
	ORLEN KOL-TRANS SP. Zo.o.	1,73	
	Freightliner PL Sp. Zo.o.	1,46	
	POL-MIEDZ TRANS Sp. Zo.o.	1,43	
	CTL Express Sp. Zo.o.	1,24	

	Railway undertakings	Market share (%)	Total market share of all but the principal railway undertakings
PT	Takargo	9	N.a.
RO	SNTFM CFR Marfa	45,3	54,7
	SC Grup Feroviar Roman SA	21,45	
	SC Servtrans Invest SA	9,64	
	SC Cargo trans Vagon SA	5,36	
	SC Unifertrans SA	5,36	
	SC Rompetrol Logistics SA	4,28	
	SC Transferoviar Grup SA	3,21	
	SC Logistics Services Danubius SRL	2,14	
	SC Grup Transport Feroviar SA	2,14	
	SC Cargo Romania SRL	1,12	
SE*	Green Cargo AB	60	40
	Malmtrafik i Kirusa AB	15	
	Cargo Net AB and Cargo Net AS	10	
	Hektor Rail AB	7	
	DB Schenker Rail Scandinavia A/S	3	
	TX Logistik AB	2	
	MidCargo AB	1	
	RailCare Tag AB	1	
	Stena Recycling AB	1	
SI	SZ Freight Transport	92,46	0
	Rail Cargo Austria	6,74	
	Adria Transport	0,79	

	Railway undertakings	Market share (%)	Total market share of all but the principal railway undertakings
SK	ZSSK Cargo, a. s.	95,75	2,03
	Lokorail	0,96	
	Express Rail s.r.o.	0,91	
UK	DB Schenker	48,6	51,4
	Freightliner	37,9	
	GB Railfreight	9,3	
	Direct Rail Services	3,7	
NO	CargoNet AS	75	25
	Malmtrafikk AS	22	
	Others	3	

*For Sweden, reported shares are calculated on the gross

Tables are not complete due to data privacy

Source: RMMS questionnaires filled in by Member States in May/June 2011

5b. Rail passenger transport (market shares in passengers-kilometres)

	Railway undertakings	Market share (%)	Total market share of all but the principal railway undertakings (%)
AT	ÖBB PV	94,2	5,4
	Other railway undertakings	5,8	
BE	SNCB/NMBS	99,8	0,2
	Eurostar Limited	0,2	
BG	BDZ Passenger Services	97,4	2,6
	BDZ EAD	2,6	
CZ	České Dráhy	99.76	0,24
	Viamont	0.16	
	Rail Transport	0.03	
	RegioJet	0.02	
	Vogtlandbahn-GmbH, organizační složka	0.01	
DE	DB AG	92	8
	Other railway undertakings	8	

	Railway undertakings	Market share (%)	Total market share of all but the principal railway undertakings (%)
DK	DSB: Kobenhavn (incumbent)	65	18
	DSB S-tog A/S: Kobenhavn (incumbent)	17	
	DSB First: Molmö (SE)	8	
	Arriva Tog A/S: Tarnby	4	
	Metro Service A/S: Kobenhavn	3	
	Nordtjyske Jernbaner A/S: Hjørring	<1	
	Lokalbanen A/S: Hillerød	1	
	Midtjyske Jernbaner Drift A/S: Odder	<1	
	Regionstog A/S: Holbaek	1	
	Nord-Ostsee Bahn GmbH: Kiel (DE)	<1	
	SJ (SE)	<1	
	Regionalbahn Schleswig-Holstein (DE)	<1	
EE	Edelaraudtee	50	50
	Elektriraudtee	42	
	GoRail	7	
EL	Trainose SA	n.a.	n.a.
ES	Renfe Operadora	100	0
FI	VR Ltd.	100	
FR	SNCF	99	1
	Other railway undertakings	1	

	Railway undertakings	Market share (%)	Total market share of all but the principal railway undertakings (%)
HU	MAV Start Zrt	98,2	1,8
	GySEV Zrt	1,8	
IE	Iarnrod Eireann	100	0
IT	Trenitalia	91.7	8.3
	New entrants	8.3	
LT	SC Lithuanian Railways	100	0
LU	N.a.	n.a.	n.a.
LV	A/s Pasazieru vilciens (AS PV)	89,43	10,54
	SAI LDZ Cargo	10,54	
NL	Netherlands Railways	95,2	4,8
	Other railway undertakings	4,8	
PL	PKP Intercity SA	46,82	48,31
	Przewozy Regionalne SP ZO O	36,22	
	Koleje Mazowieckie – KM SP ZO O	10,15	
	PKP SKM SP ZO O	4,87	
PT	Fertagus	9,6	n.a.
RO	CFR Calatori	95,51	3,93
	SC REGIOTRANS SRL	3,93	

	Railway undertakings	Market share (%)	Total market share of all but the principal railway undertakings (%)
SE	Arriva Tåg AB	n.a.	n.a.
	A-Train AB	n.a.	
	Bottniatåg AB	n.a.	
	DB Regio Sverige AB	n.a.	
	DSB	n.a.	
	DSB Småland	n.a.	
	DSBFirst Sverige AB	n.a.	
	DSBFirst Väst AB	n.a.	
	Inlandståget AB	n.a.	
	Merresor AB	n.a.	
	Roslagståg AB	n.a.	
	SJ AB	n.a.	
	SJ Norrlandståg AB	n.a.	
	Stockholmståg KB	n.a.	
	Svenska Tågkompaniet AB	n.a.	
Tågakeriet i Bergslagen AB	n.a.		
Veolia Transport Sverige AB	n.a.		
SI	SZ Passenger transport	99,99	0,01
SK	ZSSK Slovensko	99,97	0,03
UK	Virgin Trains	10,1	89,9
	South West Trains	9,7	
	First Great Western	9,6	
	East Coast	7,9	

	Railway undertakings	Market share (%)	Total market share of all but the principal railway undertakings (%)
	Southern	7,1	
	Southeastern	7,1	
	National Express East Anglia	6,9	
	First Capital Connect	5,8	
	Cross Country	5,5	
	First Scotrail	5,0	
	East Midlands	3,7	
	London Midland	3,3	
	First Transpennine Express	2,7	
	Eurostar	2,6	
	Northern-East	2,2	
	Arriva Train Wales	2,0	
	C2C	1,7	
	Chiltern	1,6	
	Northern West	1,4	
NO	NSB AS	88	12
	Flytoget AS	9	
	NSB Gjøvikbanen AS	2	
	Others (Ofotbanen AS and SJ AB)	1	

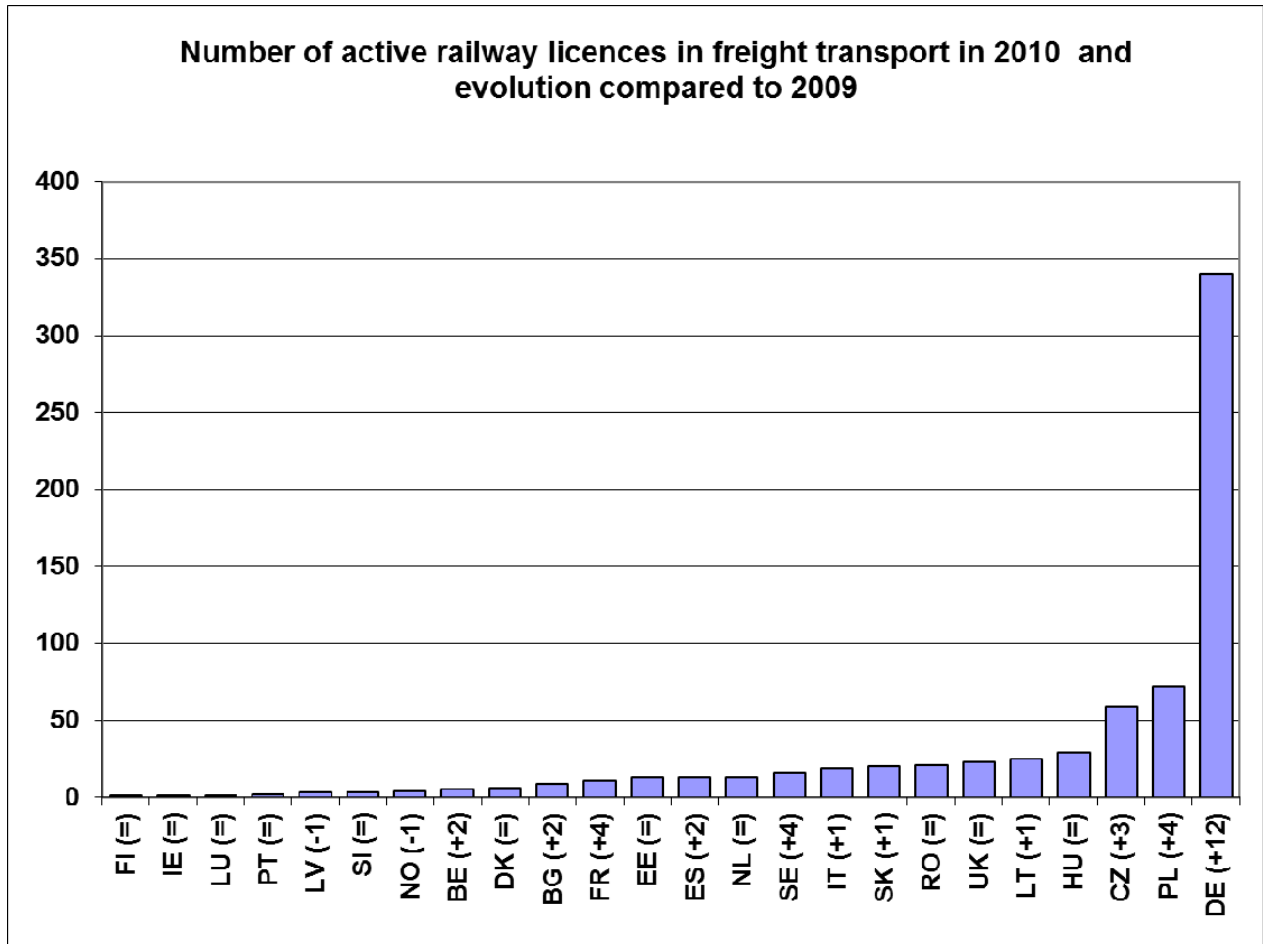
Tables are not complete due to data privacy

Source: RMMS questionnaires filled in by Member States in May/June 2011

ANNEX 6

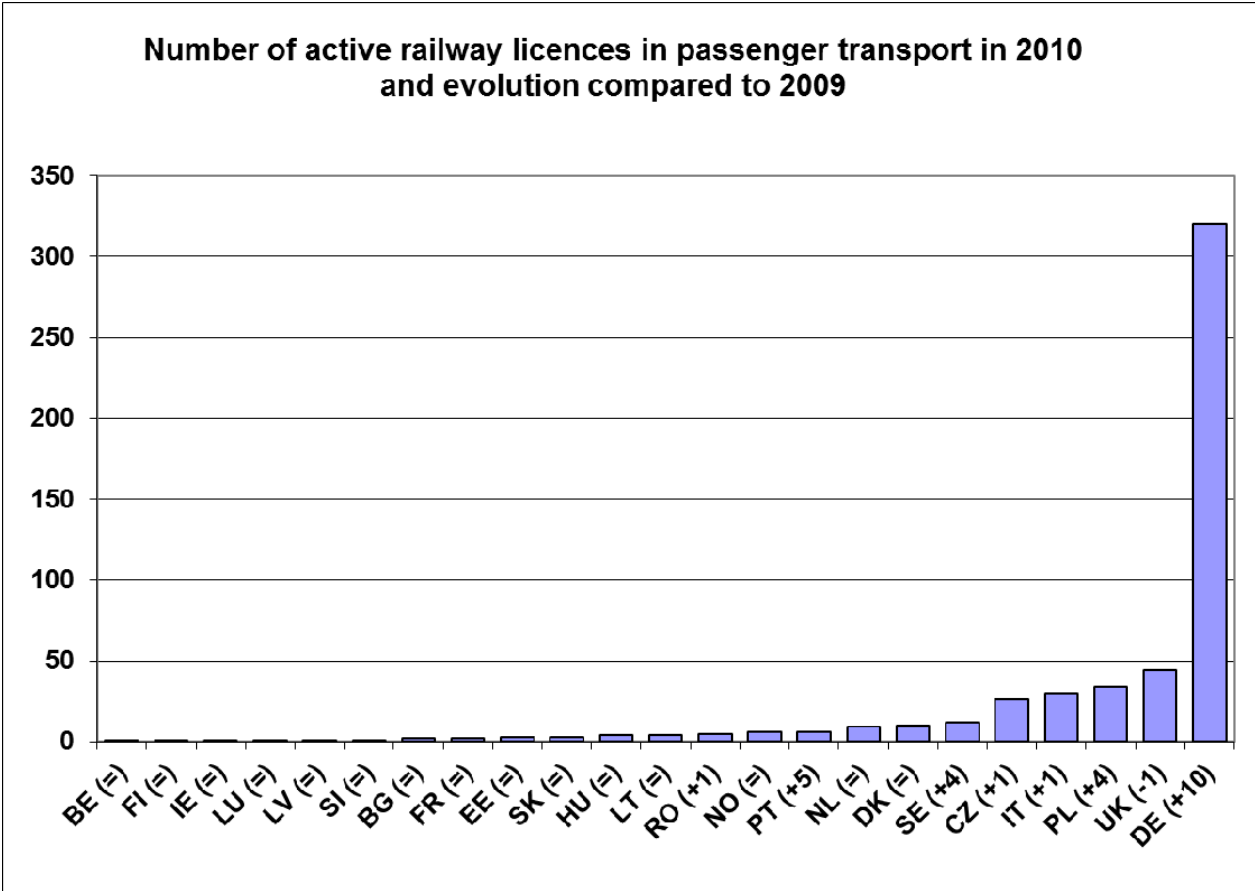
Number of active licences

6a. Active licences in freight transport issued according to Directive 95/18/EC



Source: RMMS questionnaires filled in by Member States in May/June 2011

6b. Active licences in passenger transport issued according to Directive 95/18/EC



Source: RMMS questionnaires filled in by Member States in May/June 2011

ANNEX 7

Employment

7a. Employment of railway undertakings and infrastructure managers at the end of 2010

	Total staff of railway undertakings	Of which train drivers	Total staff of infrastructure managers	Other staff including in rail related service companies (e. g. maintenance workshops, terminal operators, training, train driver leasing, energy supply)
AT*	42473	4765	16298	N.a.
BE	20411**	3463*	12750	4217
BG	13903	2169	14509	2429
CZ	38046***	n.a.	8795****	n.a.
DE	80000c	n.a.	59000c	n.a.
DK	9500c	2500c	2132	n.a.
EE	n.a.	600c	1000c	n.a.
EL	n.a.	n.a.	n.a.	n.a.
ES	13976	5034	13761	n.a.

*ÖBB only

**SNCB/NMBS

***České dráhy

****Railway Infrastructure Administration

C: approximative number

	Total staff of railway undertakings	Of which train drivers	Total staff of infrastructure managers	Other staff including in rail related service companies (e. g. maintenance workshops, terminal operators, training, train driver leasing, energy supply)
FI	9242	1652	702	n.a.
FR	110000c	20000c	54000c	n.a.
HU	16493	n.a.	19145	n.a.
IE	4254	530	n.a.	n.a.
IT	39668	n.a.	30209	10276
LT	6682	639	3737	1651
LU	3580	221	1283	2297
LV	4051	848	7031*	n.a.
NL	26868	4500	4161	n.a.
PL	62746	13211	40863	n.a.

***Public infrastructure manager**

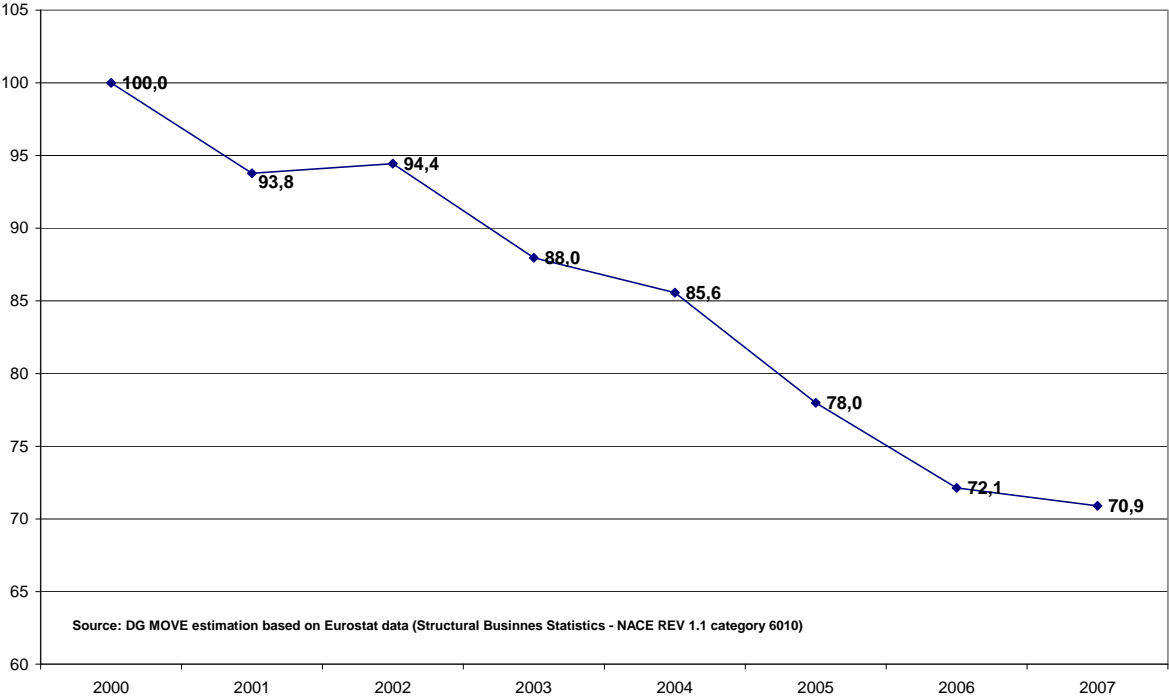
	Total staff of railway undertakings	Of which train drivers	Total staff of infrastructure managers	Other staff including in rail related service companies (e. g. maintenance workshops, terminal operators, training, train driver leasing, energy supply)
PT	4210	1098	3445	412
RO	25592*	5026	25130	n.a.
SE	10168	n.a.	8004**	n.a.
SI	4150	958	2742	2069
SK	14344	2900	16955	n.a.
UK	56000	14000	37153	n.a.
NO	n.a.	n.a.	3376	n.a.

***Public sector**

****Figures for the Swedish Transport Administration include the whole staff working for both road and rail**

Source: RMMS Questionnaires filled in by Member States in May/June 2011

7b. Railways - number of persons employed in the EU27 index number - 2000=100



7c Railways - number of persons employed in the EU27 and its countries

GEO/TIME	2000	2001	2002	2003	2004	2005	2006	2007	2008
European Union (27 countries)	:	:	:	:	:	880.700	819.200	806.100	:
European Union (25 countries)	1.052.100	986.600	993.600	925.500	900.200	:	:	:	:
Belgium	:	:	:	:	:	:	:	:	:
Bulgaria	:	:	:	:	:	:	:	17.892	17.365
Czech Republic	:	:	:	:	:	:	:	:	:
Denmark	:	:	7.839	8.230	8.619	8.465	:	8.257	9.527
Germany (including former GDR from 1991)	90.607	95.881	90.742	87.752	82.627	80.804	79.264	79.358	77.410
Estonia	:	:	4.643	3.917	:	3.536	3.430	3.388	3.109
Ireland	:	:	:	:	:	:	:	:	:
Greece	:	:	:	:	:	:	:	:	:
Spain	39.065	38.488	37.577	36.788	36.377	21.040	20.810	20.642	21.063
France	:	:	:	:	:	:	:	:	:
Italy	129.543	81.178	75.955	73.814	69.164	68.605	65.606	64.115	57.394
Cyprus	0	0	0	0	0	0	0	0	0
Latvia	:	:	:	15.611	15.401	15.178	14.841	:	5.111
Lithuania	:	14.380	:	:	:	:	:	10.821	:
Luxembourg	3.123	3.212	3.249	3.194	3.100	3.067	3.030	3.109	:
Hungary	:	56.784	55.815	55.129	52.776	46.825	44.206	43.073	17.515
Malta	0	0	0	:	:	:	:	:	:
Netherlands	:	:	:	:	:	:	:	:	:
Austria	:	:	:	48.900	46.931	15.897	14.833	14.174	13.096
Poland	:	:	:	:	124.139	121.642	120.780	120.382	119.328
Portugal	:	:	:	:	4.953	:	:	:	:
Romania	:	:	:	:	:	42.295	42.301	:	:
Slovenia	:	:	8.392	:	8.228	:	:	:	:
Slovakia	:	:	:	:	:	:	:	:	:
Finland	9.799	9.427	9.057	8.668	8.402	7.991	7.866	:	:
Sweden	12.273	9.181	8.655	8.560	8.556	8.108	8.188	8.909	9.882
United Kingdom	48.754	51.683	48.304	48.396	56.278	55.012	53.884	55.746	:
Norway	7.078	6.296	5.930	5.673	5.050	4.880	4.005	4.065	4.117
Switzerland	:	:	:	:	:	:	:	:	:
Croatia	:	:	:	:	:	:	:	:	:
Former Yugoslav Republic of Macedonia, the	:	:	:	:	:	:	:	:	:
Albania	:	:	:	:	:	:	:	:	:

Notes to figures 7b and 7c:

Statistics on the number of persons employed in the railways industry shows a clear downwards trend in recent years. However, these figures refer to the "Transport via railways" industry as defined in the NACE classification REV. 1.1¹. This NACE class (60.10) includes the following economic activities:

- Passenger transport by interurban railways
- Freight transport by interurban, suburban and urban railways

¹ NACE is the official classification used by Eurostat and the European Statistical System for defining economic activities.

In contrast, the same NACE class (60.10) does NOT include² the following:

- **passenger and freight terminal activities, cargo handling, storage and other auxiliary activities (NACE 63)**
- **maintenance and minor repair of rolling stock (NACE 63.21)**
- **operation of railroad infrastructure (NACE 63.21)**

In conclusion, statistics on the number of persons employed in the railways industry (NACE class 60.10) should be interpreted with care as part of the drop observed in the EU between 2000 and 2007 is the result of a "coding effect" linked to the split of activities. Because of missing data for some countries, it is not possible to precisely estimate the impact of this "coding effect".

² See also in RAMON (Eurostat)

ANNEX 8

Rail infrastructure capacity, railway lines density and intensity of network use 2009

	Length of lines in use (in km)		Railway lines density (km/1000km ²) in 2009	Intensity of network use per kilometre in 2009	
				freight transport (million tkm/km of lines)	Passenger transport (m pkm/km of lines)
AT	5635		67,2	3.15	1,89
BE	3578		117,2	1,78	2,91
BG	4150		37,4	0,75	0,51
CZ	9578		121,4	1,34	0,68
DE	33714		94,4	2,84	2,44
DK	2667		61,8	0,64	2,32
EE	919		21,0	6,47	0,27
EL	2552		19,4	0,21	0,55
ES	13336		26,3	0,53	1,63
FI	5919		17,5	1,49	0,66
FR	29422		53,3	1,09	2,92
HU	7892		84,8	0,97	1,01
IE	1919		27,5	0,04	0,89
IT	17004		56,4	1,05	2,83
LT	1767		28,2	6,72	0,23
LU	275		106,3	0,73	1,09
LV	1884		29,2	9,94	0,42
NL	2886		69,5	1,93	5,68
PL	20770		66,4	4,24	1,57
PT	2842		30,9	0,76	1,48
RO	10776		45,2	1,03	0,57
SE	11138		25,2	1,74	1,01
SI	1228		60,6	2,30	0,65
SK	3623		73,9	1,92	0,63
UK	16272		66,7	1,30	3,24
NO	4114		12,7	0,89	0,73

	Railway lines density (km/million inhabitants) in 2009
AT	673
BE	336
BG	543
CZ	913
DE	410
DK	482
EE	686
EL	228
ES	294
FI	1117
FR	457
HU	785
IE	434
IT	285
LT	524
LU	573
LV	830
NL	176
PL	547
PT	267
RO	965
SE	1213
SI	605
SK	671
UK	266
NO	852

Source: Calculations based on table 2.2.5, 2.3.7 and 2.5.3 of the EU Transport in Figures, Statistical Pocketbook 2011.

For Spain referred only to the main rail network managed by ADIF. The data of Spain in the Statistical Pocketbook include the regional rail networks.

ANNEX 9

Capacity of the high speed rail network (1985-2010)

9a. Lengths of lines or of sections of lines on which trains can go faster than 250 km/h at some point during the journey:

	UK	BE	DE	ES	FR	IT	NL	EU
1985	0	0	0	0	419	224	0	643
1990	0	0	90	0	710	224	0	1024
1995	0	0	447	471	1281	248	0	2447
2000	0	72	636	471	1281	248	0	2708
2001	0	72	636	471	1540	248	0	2967
2002	0	137	833	471	1540	248	0	3229
2003	74	137	875	1069	1540	248	0	3943
2004	74	137	1196	1069	1540	248	0	4264
2005	74	137	1196	1090	1540	248	0	4285
2006	74	137	1285	1272	1540	248	0	4556
2007	113	137	1285	1511	1872	562	0	5480
2008	113	137	1285	1599	1872	744	0	5750
2009	113	209	1285	1604	1872	923	120	6126
2010	113	209	1285	2056	1884	923	120	6590

9b. High speed lines currently under construction:

	Line	Length in km	Start of operation
DE	München-Augsburg	62	2011
	Gröbers-Erfurt	98	2015
	Nürnberg-Erfurt	218	2017
ES	Madrid-Valencia/Alicante/Murcia	902	2010-2012
	Vitoria-Bilbao-San Sebastian	175	2012
	Variante de Pajares	50	2012
	Ourense-Santiago	88	2012
	Bobadilla-Granada	109	2012
	La Coruna-Vigo	158	2012
	Barcelona-Figueras	132	2012
FR	Dijon-Mulhouse	150	2011
	Nîmes-Montpellier	70	2016
PT-ES	Porto-Vigo	55	2013

Note 1: The length indicated above is the length of the line under construction and not necessarily the distance between the places named.

Note 2: 436,4 km from the Madrid-Valencia/Albacete line are in service since December 2010

Source: EU Transport in Figures, Statistical Pocketbook 2011, table 2.5.4. on the basis of UIC statistics

ANNEX 10

Investments in rail infrastructure

10a. Total investments in m EUR in 2010-2011 (conventional lines)

	Maintenance		Renewals		Enhancements	
	2010	Forecast for 2011	2010	Forecast for 2011	2010	Forecast for 2011
AT	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
BE	n.a.	n.a.	445	413	457	568
BG	46	50	46	46	n.a.	n.a.
CZ	372**	n.a.	372**	n.a.	576	n.a.
DE	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
DK	158	143	222	225	189	767
EE	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
EL	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
ES	567	550	240	78	396	255
FI	167	185	173	106	n.a.	n.a.
FR	1997	2140	1404*	1609*	176	310
HU	101	104	47	86	263	139
IE	93	90	89	80	45	10
IT	1025*	1075*	999*	881*	1718	592
LT	144	145	8	11	52	110
LU	117	127	22	19	155	248
LV	105	104	42	23	36	44

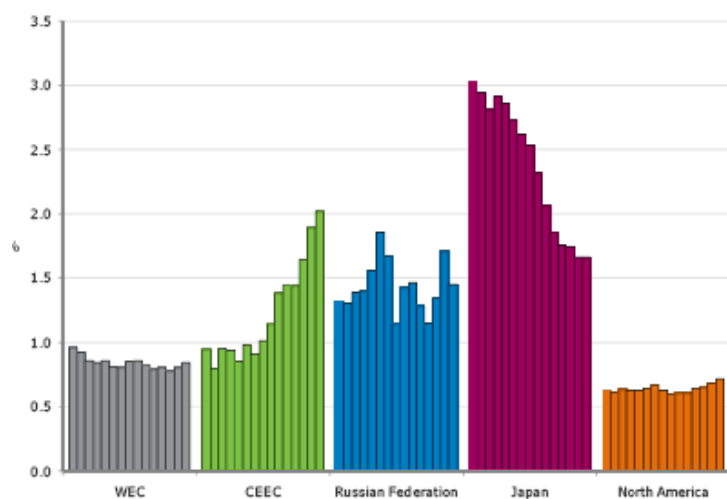
* Including high-speed lines

** Total for maintenance and renewals

	Maintenance		Renewals		Enhancements	
	2010	Forecast for 2011	2010	Forecast for 2011	2010	Forecast for 2011
NL	972	658	491	468	794	749
PL	482	519	626	1174	0	0
PT	114	103	39	43	290	285
RO	18	18	4	2	271	320
SE	500	n.a.	224	n.a.	1433	n.a.
SI	61	74	38	30	23	22
SK	110	118	24	30	n.a.	n.a.
UK	1272	1056	2276	2621	1217	1662
NO	145	152	190	150	496	587

Source: RMMS Questionnaires filled in by Member States in May/June 2011

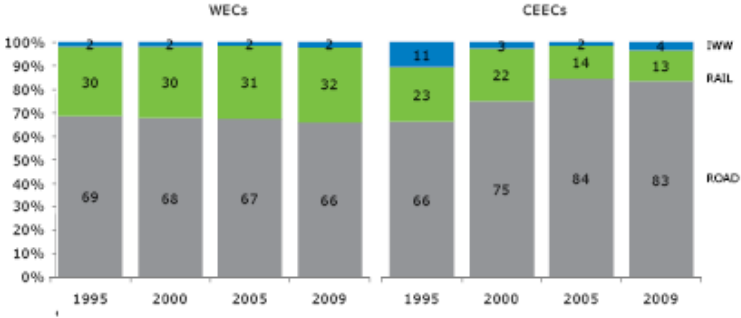
10b. Investment in inland transport infrastructure 1995-2009 (as a percentage of GDP, at current prices)



Source: The International Transport Forum at the OECD

Note: Western European Countries (WECs) include AT, CH, DK, DE, ES, FI, FR, UK, IE, IT, PT, SE; Central en Eastern European Countries (CCECs) include CZ, EE, HR, LT, LV, MK, PL, RO, SK, SV and SRB

10c. Distribution of infrastructure investment between modes (Euros, current prices, current exchange rates)



Source: The International Transport Forum at the OECD

ANNEX 11

Infrastructure charges

Average charge in €/train km (2010), excluding cost of the use of electricity

Train category	AT	BE	BG	CZ	DE	DK	EE
1000 gross tonne freight train	3,73*	2,25	3,73	3,73	2,57	-	4,7
500 gross tonne intercity passenger train	3,20*	4,57	2,24	0,86	5,14	-	2,03

Train category	ES	FI	FR	HU	IE	IT	LT	LU
1000 gross tonne freight train	0,13	1,73	1,8	2,63	9,80	2.45	6,67	0,72
500 gross tonne intercity passenger train	0,26 to 7,94	0,64	3,6	2,61	4,40	2.66	7,38	2,24

Train category	LV	NL	PL	PT	RO	SE	SI
1000 gross tonne freight train	9,13	1,75-1,84	2,01-4,46	1,51	3,49	0,45	1,11-2,23
500 gross tonne intercity	4,78	1,56-1,62	1,40-3,47	1,51	2,28	0,71	1,78-2,23

passenger train							
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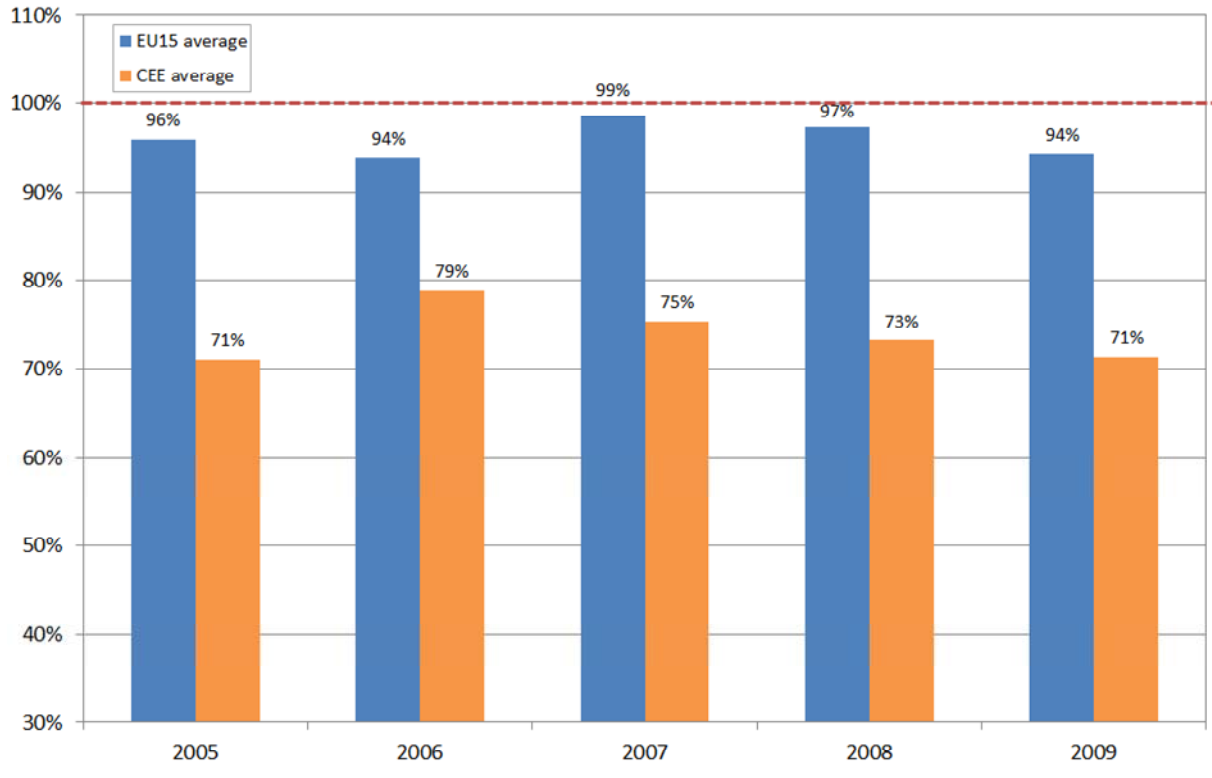
Train category	SK	UK	NO
1000 gross tonne freight train	10,21	1,69	n.a.
500 gross tonne intercity passenger train	1,92	1,12	n.a.

* Within the average figures indicated in the table for Austria, the level of track access charges per train can vary strongly

Source: RMMS Questionnaires filled in by Member States in May/June 2011

ANNEX 12

Compensation of public service obligations



Source: CER

ANNEX 13

Multi-annual contracts

Part of the network covered by multi-annual infrastructure management contracts (%)

BE	BG	DE	DK	ES	F	IT	LT	LU	NL	RO	SE	SK	U
100	100	100	100	85	100	100	100	100	96	100	10	100	1

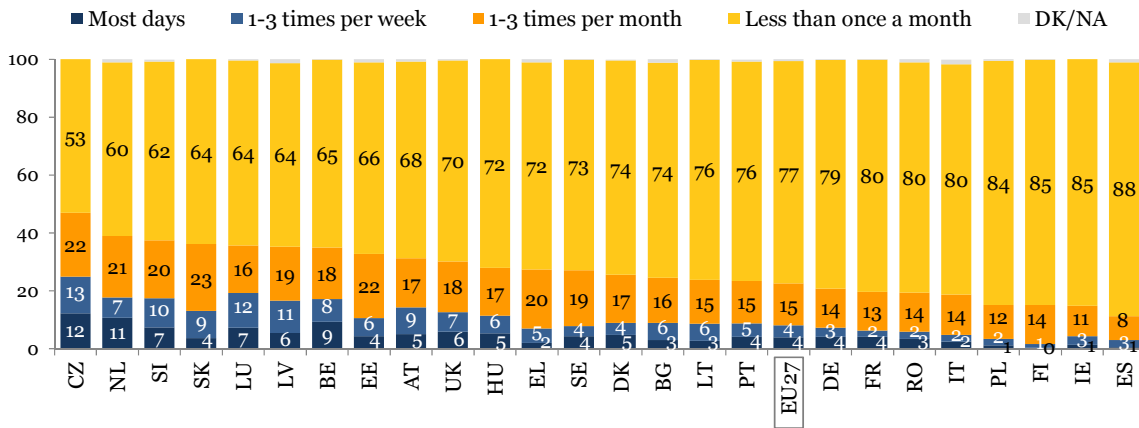
Source: RMMS Questionnaires filled in by Member States in May/June 2011.

ANNEX 14

Frequency and purpose of passengers' journeys by rail

14a. Frequency of journeys by rail

Frequency of journeys by rail

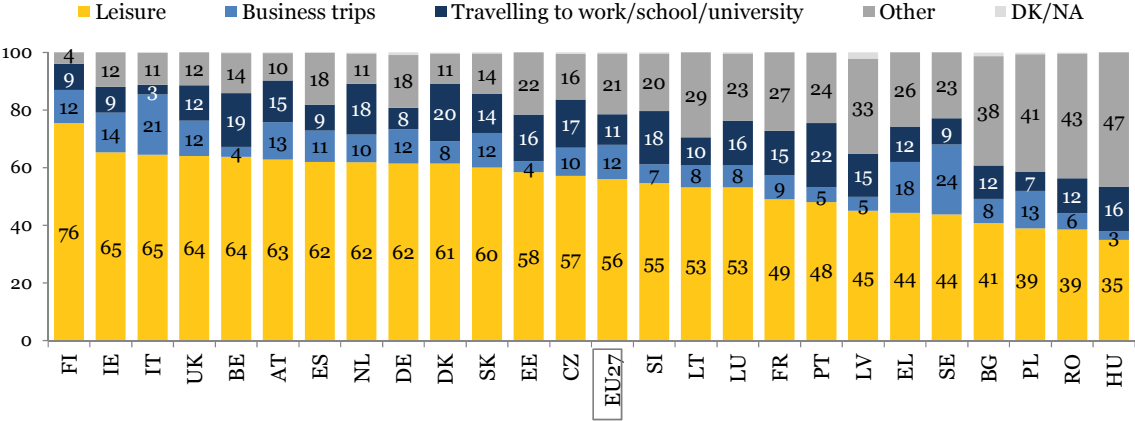


Q1. How often do you travel by train [IN YOUR COUNTRY]?
Base: all respondents, % by country

Source: Flash Eurobarometer survey on passengers' satisfaction with rail services, June 2011

14b. Most frequent purpose of journeys by rail

Most frequent purpose of journeys by rail



Q2. What is the most frequent purpose of your rail trip [IN YOUR COUNTRY]?
 Base: all respondents, % by country

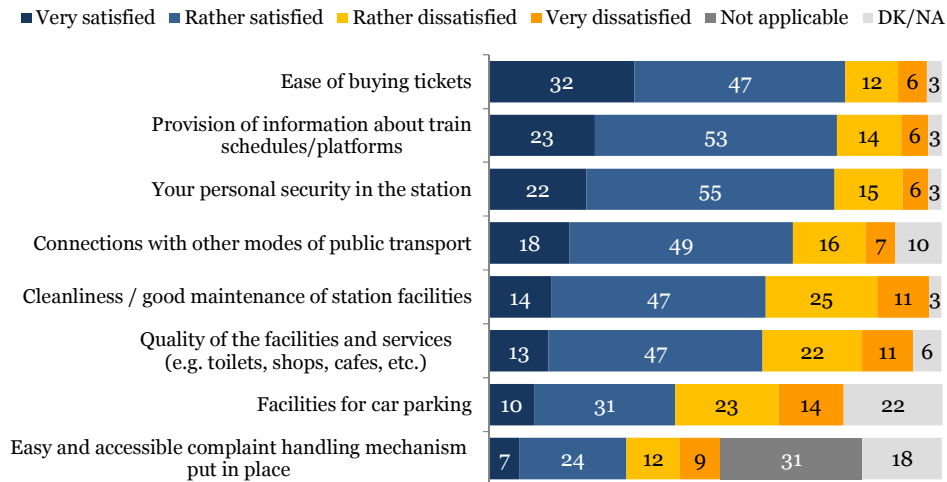
Source: Flash Eurobarometer survey on passengers' satisfaction with rail services, June 2011

ANNEX 15

Satisfaction with railway stations

15a. Satisfaction with various features of railway stations

Satisfaction with various features of railway stations

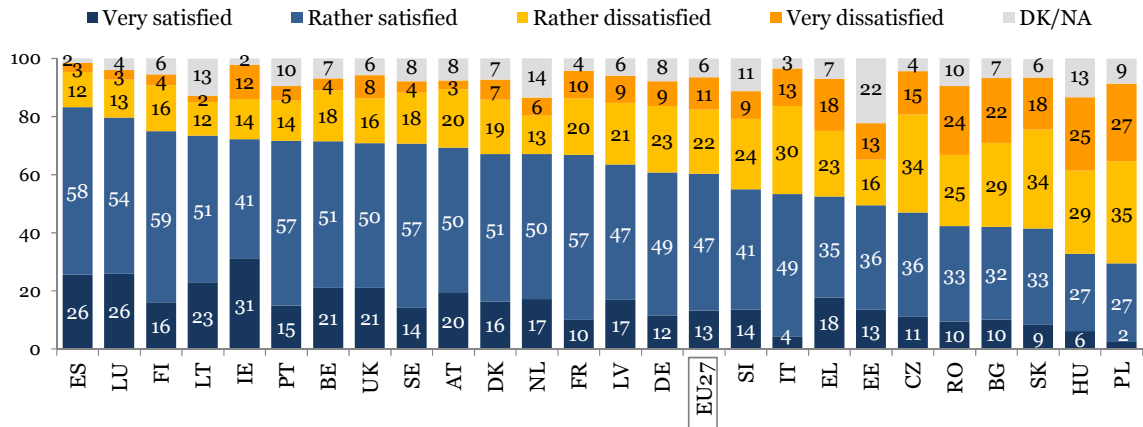


Q3. Are you very satisfied, rather satisfied, rather dissatisfied or very dissatisfied with the following features of the train stations [IN YOUR COUNTRY]?
Base: all respondents, %EU27

Source: Flash Eurobarometer survey on passengers' satisfaction with rail services, June 2011

15b. Satisfaction with quality of the facilities and services

Satisfaction with **quality of the facilities and services** (e.g. toilets, shops, cafes, etc.)



Q3. Are you very satisfied, rather satisfied, rather dissatisfied or very dissatisfied with the following features of the train stations [IN YOUR COUNTRY]?
Base: all respondents, % by country

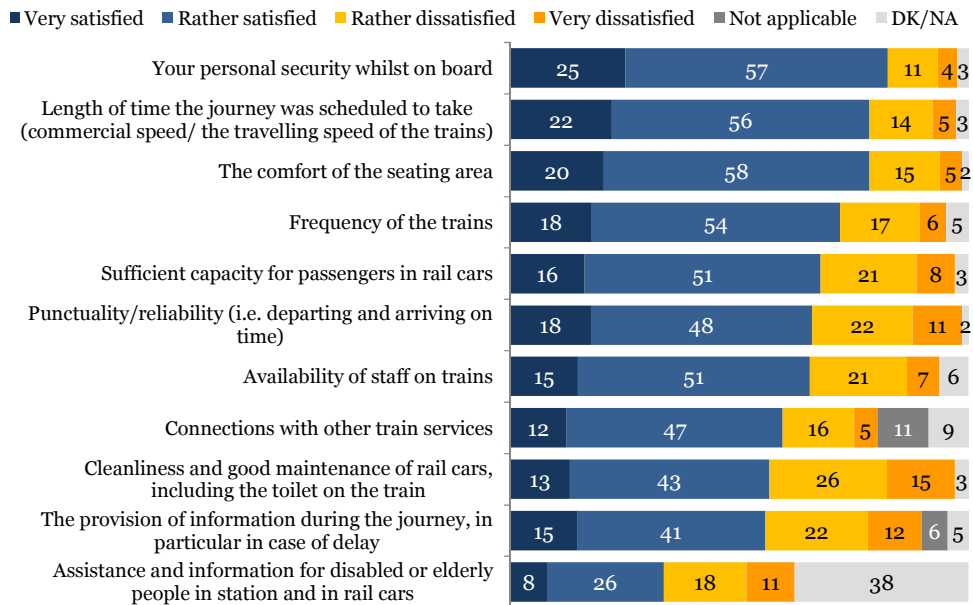
Source: Flash Eurobarometer survey on passengers' satisfaction with rail services, June 2011

ANNEX 16

Satisfaction with train services

16a. Satisfaction with various features of trains and train services

Satisfaction with various features of trains and train services

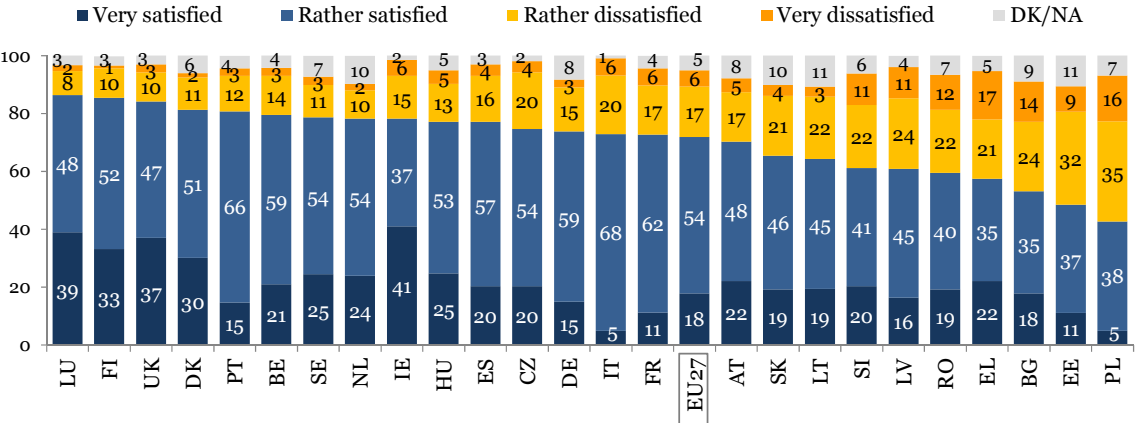


Q4. Are you very satisfied, rather satisfied, rather dissatisfied or very dissatisfied with the following features of the trains [IN YOUR COUNTRY]?
Base: all respondents, %EU27

Source: Flash Eurobarometer survey on passengers' satisfaction with rail services, June 2011

16b. Satisfaction with frequency of the trains

Satisfaction with frequency of the trains

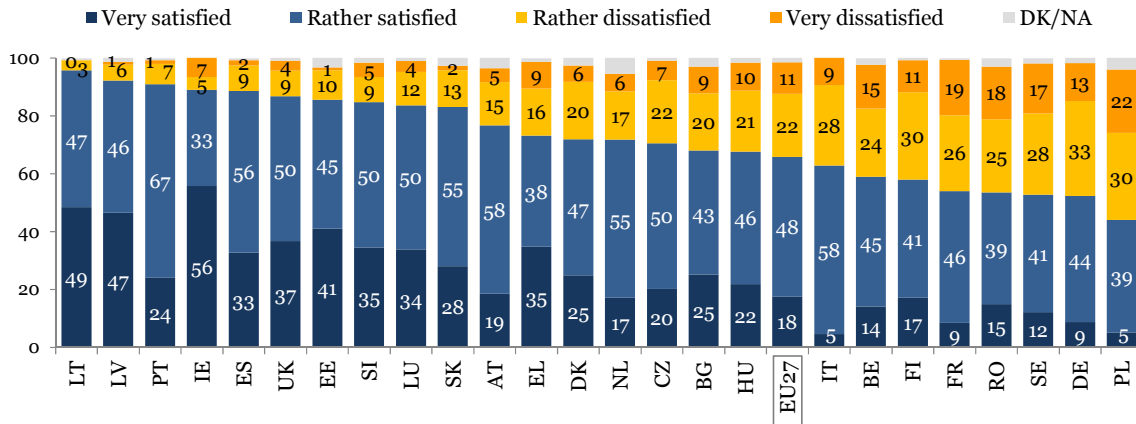


Q4. Are you very satisfied, rather satisfied, rather dissatisfied or very dissatisfied with the following features of the trains [IN YOUR COUNTRY]?
Base: all respondents, % by country

Source: Flash Eurobarometer survey on passengers' satisfaction with rail services, June 2011

16c. Satisfaction with punctuality and reliability

Satisfaction with punctuality and reliability (i.e. departing and arriving on time)

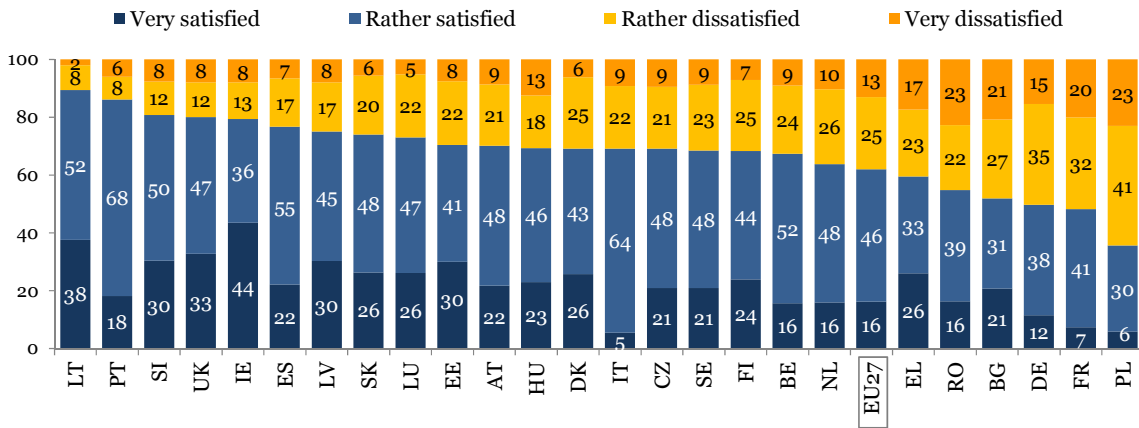


Q4. Are you very satisfied, rather satisfied, rather dissatisfied or very dissatisfied with the following features of the trains [IN YOUR COUNTRY]?
Base: all respondents, % by country

Source: Flash Eurobarometer survey on passengers' satisfaction with rail services, June 2011

16d. Satisfaction with the provision of information during the journey, in particular in case of delay

Base: those respondents who provided an answer

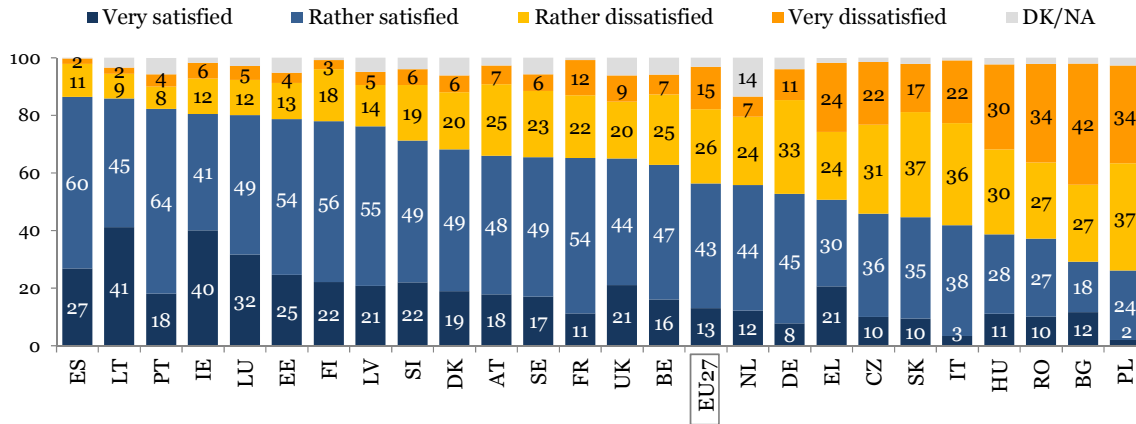


Q4. Are you very satisfied, rather satisfied, rather dissatisfied or very dissatisfied with the following features of the trains [IN YOUR COUNTRY]?
% by country

Source: Flash Eurobarometer survey on passengers' satisfaction with rail services, June 2011

16e. Satisfaction with cleanliness and good maintenance of rail cars

Satisfaction with **cleanliness and good maintenance of rail cars**, including the toilet on the train



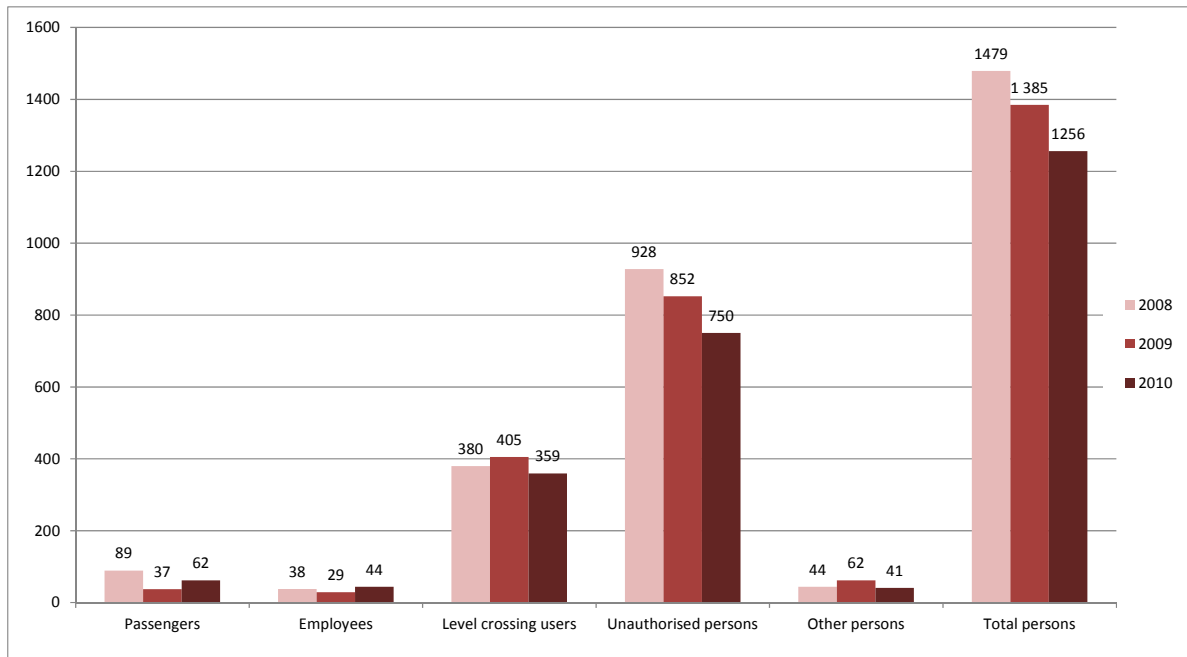
Q4. Are you very satisfied, rather satisfied, rather dissatisfied or very dissatisfied with the following features of the trains [IN YOUR COUNTRY]?
Base: all respondents, % by country

Source: Flash Eurobarometer survey on passengers' satisfaction with rail services, June 2011

ANNEX 17

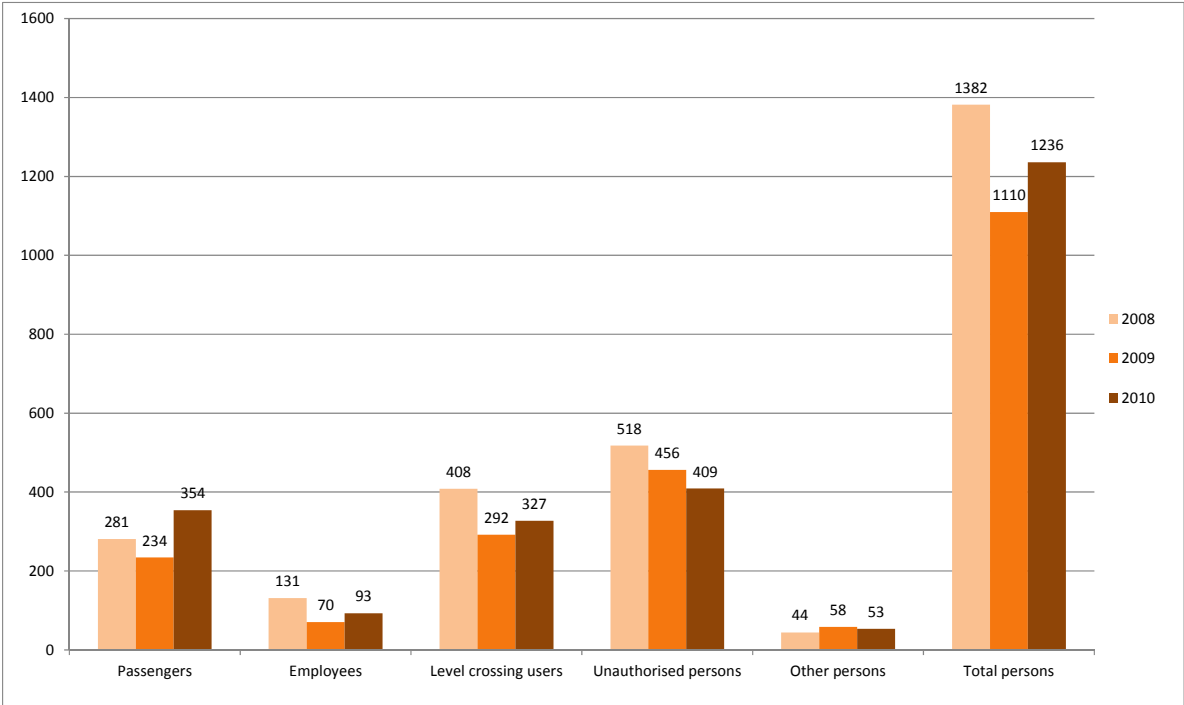
Safety

17a Reported number of fatalities per victim type 2008, 2009 and 2010



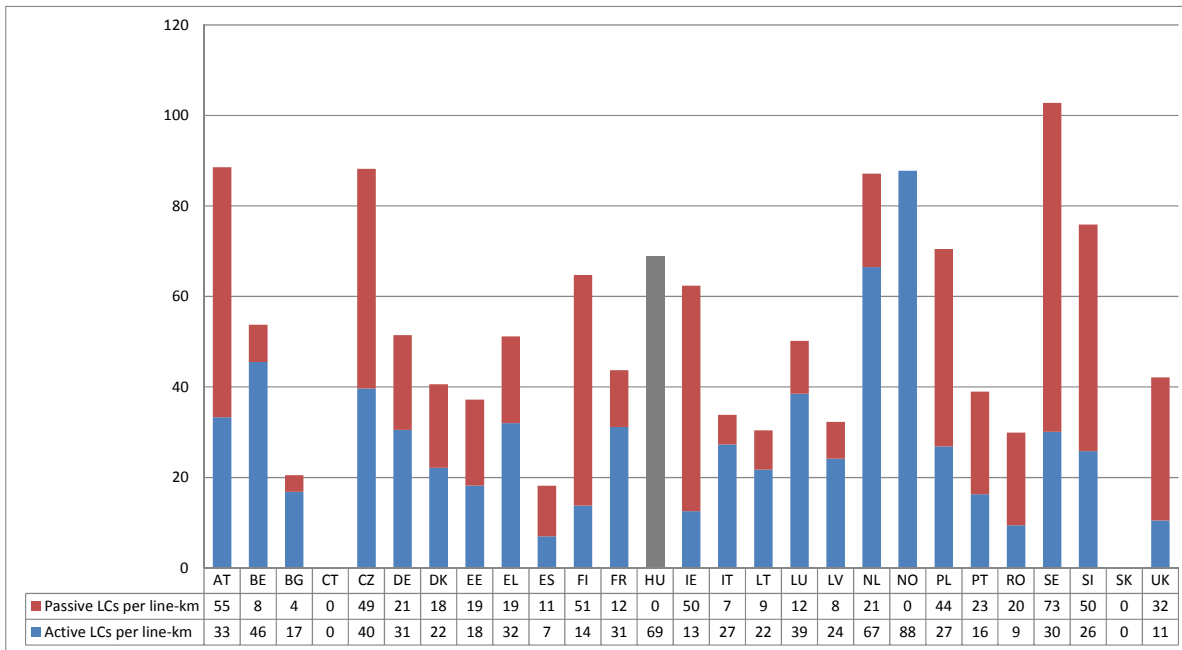
Source: European Railway Agency, *The railway safety performance in the European Union*

17b Reported number of serious accidents per victim category 2008, 2009 and 2010



Source: European Railway Agency, The railway safety performance in the European Union

17c Number of active and passive level crossings per ten line kilometres in 2010



Source: European Railway Agency, *The railway safety performance in the European Union*

ANNEX 18

RMMS questionnaire 2011

Please fill in the questionnaire electronically. Feel free to change the size of the tables according to your needs. You may provide additional comments under each answer. If there have been no developments or measures undertaken in a certain field, please indicate it clearly. In case of non-availability of the requested data, use the abbreviation "n/a". Thank you!

1. Evolution of rail transport performance and compensation of Public Service Obligations (1):

	2009	%-variation compared to previous year	2010	%-variation compared to previous year
Freight -in tkm (2) total				
international				
transit				
national				
Passengers -in pkm (3)- total (4)				
international				
Transit (5)				
national				
of which under PSO:				
Paid compensation for PSO (in euro):				

2. Shares of railway undertakings (6) in total transport performance at the end of 2010
 (please list railway undertakings with market shares in tkm/pkm \geq 1%):

Railway undertakings (FREIGHT) (7)	Share (% of tkm)	Total market share of all but the principal railway undertakings

Railway undertakings (PASSENGERS) (7)	Share (% of pkm)	Total market share of all but the principal railway undertakings

3. Regulatory Bodies:

	In 2009	In 2010
No. of staff dealing with regulatory issues related to rail market access:		
No. of complaints dealt with:		
No. of ex officio investigations dealt with:		
No. of decisions taken - on complaints:		

- on ex officio investigations:		
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4. Please list national legislation and regulatory acts relevant to railway transport which has been issued between 1 January and 31 December 2010.

5. Please list relevant developments as regards restructuring of the incumbent railway undertaking and adoption/implementation of national transport strategies that have taken place between 1 January and 31 December 2010.

6. Please list important training initiatives/measures (8) in the field of railway transport taken in your country between 1 January and 31 December 2010.

7. Employment of railway undertakings and infrastructure managers at the end of 2010:

Total staff of railway undertakings	
- of which train drivers	
Total staff of infrastructure managers	
Other staff including in rail related service companies (e.g. maintenance workshops, terminal operators, training, train driver leasing, energy supply)	

8. Multi-annual infrastructure management contracts (9) in 2010:

Infrastructure manager	Length of the network covered by the contract	Time span of the contract starting from [date]	Definition of performance indicators agreed (Y/N)? If yes, please specify.	Total compensation paid (in Euro/year)	Existence of independent monitoring body supervising MAC (Y/N)?

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9. Infrastructure (10) expenditure - conventional network and high-speed network (11):

	Maintenance	Renewals	Enhancements
Conventional lines 2010: (in Euro)			
(in km worked on)			
Forecast for 2011 (in Euro)			
(in km worked on)			
High-speed lines 2010 (in Euro)			
(in km worked on)			
Forecast for 2011 (in Euro)			
(in km worked on)			

10. Investments in the high-speed rail network:

Lines	Km of lines being put into service in 2010	Km being put into service at a conventional planning horizon (2020/2030)

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11. Length of railway network at the end of 2010

Conventional lines (in km)	
High-speed lines (in km)	

12. Track access charges in 2010

Train category (12)	Average charge in €/train km, excluding cost of the use of electricity
1000 gross tonne freight train	
500 gross tonne intercity passenger train	
140 gross tonne suburban passenger train	

13. Please indicate whether in your country exists a performance regime set up according to Article 11 of Directive 2001/14/EC (13) and if yes, describe its main features.

14. Number of active railway licences issued by competent, national authority (14)

	Active licences on 31.12.2009	Licences withdrawn	New licences issued	Active licences on 31.12.2010
Total				
thereof: - for freight transport				
- for passenger transport				

15. Please describe briefly the status of the ERTMS deployment.

16. Are there any other developments you would like to report on?

Thank you!

Glossary:

- (1) Public Service Obligations as defined in Regulation 1370/2007 of 23 October 2007: "‘public service obligation’ means a requirement defined or determined by a competent authority in order to ensure public passenger transport services in the general interest that an operator, if it were considering its own commercial interests, would not assume or would not assume to the same extent or under the same conditions without reward";
- (2) tkm = tonne-kilometre
- (3) pkm = passenger-kilometre
- (4) Please do not include passenger transit in total figure to ensure comparability with Eurostat data.
- (5) Provide passenger transit figures as far as available. Do not include in total figure as Eurostat survey does not include them.
- (6) Please apply territoriality principle, i.e. an undertaking operating in more than one country would see its share split across respective national rail markets.
- (7) Please indicate if possible for each railway undertaking whether the majority of the assets are private or public-owned
- (8) E.g. measures related to the organisation of driver training, opening of training centres, support schemes for management training in the rail sector, setting up of an advanced apprenticeship scheme in the rail sector, international exchange programmes for staff or developments on the market for training services.
- (9) Contract concluded with the State or other competent authorities providing for financial compensation to infrastructure managers for maintenance and renewal to achieve an agreed performance, according to Directive 2001/14/EC, Article 6: "Infrastructure cost and accounts:
 - (a) Member States shall lay down conditions, including where appropriate advance payments, to ensure that, under normal business conditions and over a reasonable time period, the accounts of an infrastructure manager shall at least balance income from infrastructure charges, surpluses from other commercial activities and State funding on the one hand, and infrastructure expenditure on the other.

Without prejudice to the possible long-term aim of user cover of infrastructure costs for all modes of transport on the basis of fair, non-discriminatory competition between the various modes, where rail transport is able to compete with other modes of transport, within the charging framework of Articles 7 and 8, a Member State may require the infrastructure manager to balance his accounts without State funding.
 - (b) Infrastructure managers shall, with due regard to safety and to maintaining and improving the quality of the infrastructure service, be provided with incentives to reduce the costs of provision of infrastructure and the level of access charges.

- (c) Member States shall ensure that the provision set out in paragraph 2 is implemented, either through a contractual agreement between the competent authority and infrastructure manager covering a period of not less than three years which provides for State funding or through the establishment of appropriate regulatory measures with adequate powers.
 - (d) Where a contractual agreement exists, the terms of the contract and the structure of the payments agreed to provide funding to the infrastructure manager shall be agreed in advance to cover the whole of the contract period.
 - (e) A method for apportioning costs shall be established. Member States may require prior approval. This method should be updated from time to time to the best international practice".
- (10) As defined in Directive 91/440/EEC: "railway infrastructure` shall mean all the items listed in Annex I.A to Commission Regulation (EEC) N° 2598/70 of 18 December 1970 specifying the items to be included under the various headings in the forms of accounts shown in Annex I to Regulation (EEC) N° 1108/70, with the exception of the final indent which, for the purposes of this Directive only, shall read as follows: 'Buildings used by the infrastructure department",
- The definition and scope of the term "Transport Infrastructure" according to Annex I.A to Commission Regulation (EEC) N° 2598/70 of 18 December 1970 reads as follows:
 "For the purposes of Article 1 of Council Regulation (EEC) No 1108/70 of 4 June 1970, "transport infrastructure" means all routes and fixed installations of the three modes of transport being routes and installations necessary for the circulation and safety of traffic.

A. RAIL

Railway infrastructure consists of the following items, provided they form part of the permanent way, including sidings, but excluding lines situated within railway repair workshops, depots or locomotive sheds, and private branch lines or sidings: - Ground area;

- Track and track bed, in particular embankments, cuttings, drainage channels and trenches, masonry trenches, culverts, lining walls, planting for protecting side slopes etc. ; passenger and goods platforms ; four-foot way and walkways ; enclosure walls, hedges, fencing ; fire protection strips ; apparatus for heating points ; crossings, etc. ; snow protection screens;
- Engineering structures : bridges, culverts and other overpasses, tunnels, covered cuttings and other underpasses ; retaining walls, and structures for protection against avalanches, falling stones, etc.;
- Level crossings, including appliances to ensure the safety of road traffic;
- Superstructure, in particular : rails, grooved rails and check rails ; sleepers and longitudinal ties, small fittings for the permanent way, ballast including stone chippings and sand ; points, crossings, etc. ; turntables and traversers (except those reserved exclusively for locomotives);
- Access way for passengers and goods, including access by road;
- Safety, signalling and telecommunications installations on the open track, in stations and in marshalling yards, including plant for generating, transforming and distributing electric current for signalling and telecommunications ; buildings for such installations or plant ; track brakes;
- Lighting installations for traffic and safety purposes;

- Plant for transforming and carrying electric power for train haulage: sub-stations, supply cables between sub-stations and contact wires, catenaries and supports; third rail with supports;
- Buildings used by the infrastructure department..."

(11) High-speed infrastructure as defined in Directive 2008/57/EC, Annex I: "The high-speed lines shall comprise:

- specially built high-speed lines equipped for speeds generally equal to or greater than 250 km/h,
- specially upgraded high-speed lines equipped for speeds of the order of 200 km/h,
- specially upgraded high-speed lines which have special features as a result of topographical, relief or town planning constraints, on which the speed must be adapted to each case. This category also includes interconnecting lines between the high-speed and conventional networks, lines through stations, accesses to terminals, depots, etc. travelled at conventional speed by 'high-speed' rolling stock.

This network includes traffic management, tracking and navigation systems, technical installations for data processing and telecommunications intended for services on these lines in order to guarantee the safe and harmonious operation of the network and efficient traffic management."

(12) The International Transport Forum in Leipzig (D) (<http://www.internationaltransportforum.org/>) has published surveys on track access charges in the indicated categories.

(13) Article 11 of Directive 2001/14/EC reads as follows: "Performance scheme

- (a) Infrastructure charging schemes shall through a performance scheme encourage railway undertakings and the infrastructure manager to minimise disruption and improve the performance of the railway network. This may include penalties for actions which disrupt the operation of the network, compensation for undertakings which suffer from disruption and bonuses that reward better than planned performance.
- (b) The basic principles of the performance scheme shall apply throughout the network".

(14) Licences issued according to Directive 95/18/EC: "Objective and Scope:

Article 1

- (a) This Directive concerns the criteria applicable to the issue, renewal or amendment of licences by a Member State intended for railway undertakings which are or will be established in the Community when they provide the services referred to in Article 10 of Directive 91/440/EEC under the conditions laid down in that Article.
- (b) Railway undertakings the activities of which are limited to the operation of urban, suburban or regional services shall be excluded from the scope of this Directive.

Railway undertakings and international groupings the activity of which is limited to the provision of shuttle services transporting road vehicles through the Channel Tunnel shall also be excluded from the scope of this Directive.

- (c) A licence shall be valid throughout the territory of the Community."