

Single European railway area. Recast

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In accordance with recast Directive 2012/34/EU, the Commission presented its **fifth report** on rail market surveillance. The main topics covered are:

The state of the Union's rail network: the total length of the rail network was approximately **220 000 kilometres in 2014**, an increase of about 2% compared to 2009. Since 2009, 2 800 kilometres of **electrified lines** have been added and large-scale projects were launched to electrify a large part of the networks in Denmark and the United Kingdom.

The **speed of movement** differs significantly between the Member States. Significant investments have been made to upgrade the rail network in Eastern Europe and to develop high-speed lines in Western Europe.

The report notes that, since 2009, volumes of passenger rail traffic (measured in passenger-kilometers) have remained relatively stable. In contrast, **rail freight volumes in tonne-kilometres fell sharply** in 2009 and have not returned to their initial volumes. By 2014, the modal share of rail in land freight transport was 18%, virtually the same proportion as a decade ago.

Framework conditions:

- with regard to the **evolution of infrastructure charges**, progress is mixed. The situations in the Member States are very different. In most Member States, charges for freight trains are higher than those for passenger trains, while in Germany, Spain, Belgium, France, Luxembourg and Portugal, the situation is the reverse. Freight charges in the Baltic States are particularly high;
- **infrastructure spending** increased between 2011 and 2014, from EUR 29 billion to EUR 45 billion. Total expenditures were higher in the United Kingdom and France. More than EUR 33 billion has been allocated by the EU to investments in railways in the form of grants under the current Union financial framework (2014-2020);
- the **evolution of prices** for rail transport at Union level is difficult to assess since the tariffs applied to passenger transport services vary considerably from one Member State to another. Comparable data on **punctuality** between Member States are difficult to obtain. The punctuality of long distance services is generally worse than that of regional and local services. As regards **safety**, rail transport remains one of the safest modes of transport. Between 2010 and 2014, figures for fatalities and major accidents all declined;
- with regard to **market opening**, the report notes that, on average, the market share of competing cargo operators (15% in 2006) more than doubled in 2014. By the end of 2014, rail freight transport services were still 100% operated by the historic operator in Finland, Greece, Ireland, Lithuania and Luxembourg. The **market shares of competitors in passenger transport markets are lower**, i.e. well below 20% in all Member States with the exception of Poland and the United Kingdom;
- there are still **barriers to increasing the efficiency of rail services**. While comparisons between national systems are often irrelevant, there is nevertheless a broad consensus that European railways are faced with problems of cost, quality of services and market share.

Implementation of the institutional and legal framework: over the past two decades, European legislation has sought to encourage competitiveness and **market opening** while establishing measures to **improve interoperability and security**. With the adoption of the fourth railway package, the period of structural changes in the railway sector should be completed.

However, despite positive developments such as the increase in passenger traffic volumes and investment in infrastructure, or the gradual opening of national rail markets, **the targets set for the rail sector in the 2011 Transport White Paper cannot be achieved** if the current pace continues.

In the coming years the Commission will focus on the **implementation of the legislation in force** in order to ensure that EU legislation is well understood by the sector.

The Commission is currently preparing the implementing act on the recast directive on **access to services** and facilities and the delegated act on **scheduling rules**. It has also started the revision of the [technical specification for interoperability relating to the rolling stock subsystem – noise](#), the [Rail Passenger Rights Regulation](#) and the [Combined Transport Directive](#).

The ongoing evaluations of the [Rail Freight Regulation](#) and the [Train Drivers Directive](#) could lead to updates of these acts in the coming years.