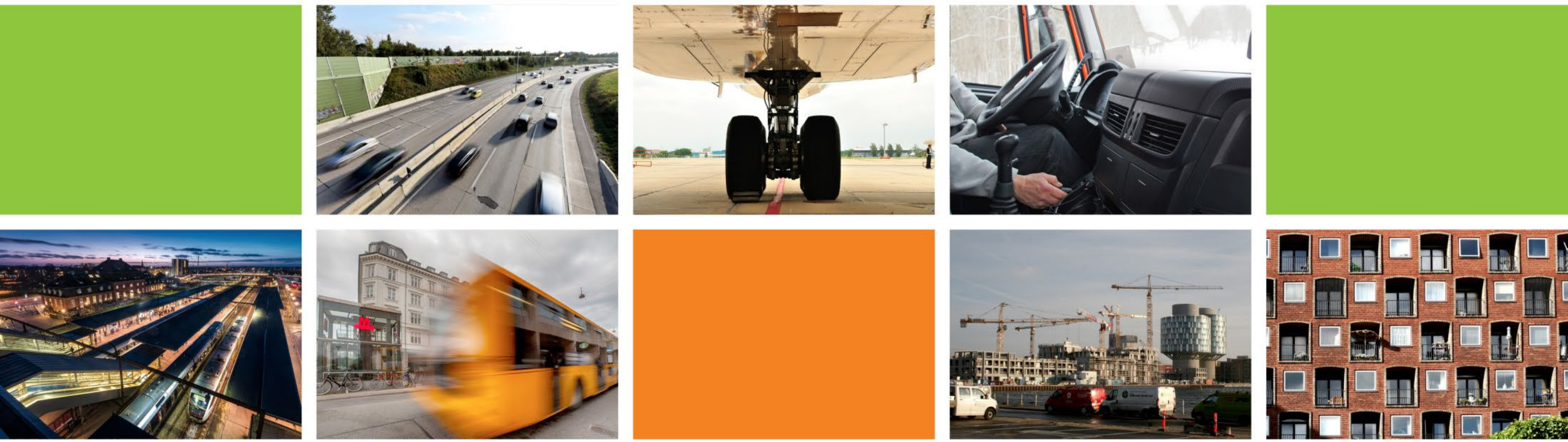
Trafik-, Bygge- og Boligstyrelsen
Danish Transport, Construction and Housing Authority

Fremme af gods på bane i europæisk perspektiv



Niels Selsmark, Trafik-, Bygge- og Boligstyrelsen
Center for marked og Kollektiv trafik

Trafikdage i Aalborg 2019

Dato 27. august 2019

Transport-, Bygnings- og Boligministeriet

Political strategies to increase freight by rail

“Rail’s market share of all rail freight traffic in Germany is to be significantly should increased over the period to 2030”

Source: Rail Freight Masterplan, Federal Ministry of Transport and digital Infrastructure, 2018

”In the long run, investments in railway infrastructure are required to increase capacity and maintenance that will allow existing capacity to be utilized”

Source: ”Effektiva, kapacitetsstarka och hållbara godstransporter – en nationell godstransportstrategi” Swedish Government 2018

“30% of road freight over 300 km should shift to other modes such as rail or waterborne transport by 2030, and more than 50% by 2050, facilitated by efficient and green freight corridors.”

Source: “White Paper” - European Commission 2011

Development of rail freight in the Scan-Med countries 2007=100 (ton-kilometer)

	2007	**2010**	**2013**	**2017**
Norway	100	100	97	105
Sweden	100	101	90	94
Denmark	100	126	138	149
Germany	100	93	98	98
Austria	100	90	88	104
Italy	100	74	75	88

Rail Freight in DK 2008-18 (mio. ton km)

	2008	2010	2012	2014	2016	2018
Nationalt	122	167	167	168	185	165
Internatio-nalt	359	207	168	227	325	272
Transit	1.387	1.866	1.943	2.058	2.106	2.155
I alt	**1.867**	**2.240**	**2.278**	**2.453**	**2.616**	**2.594**

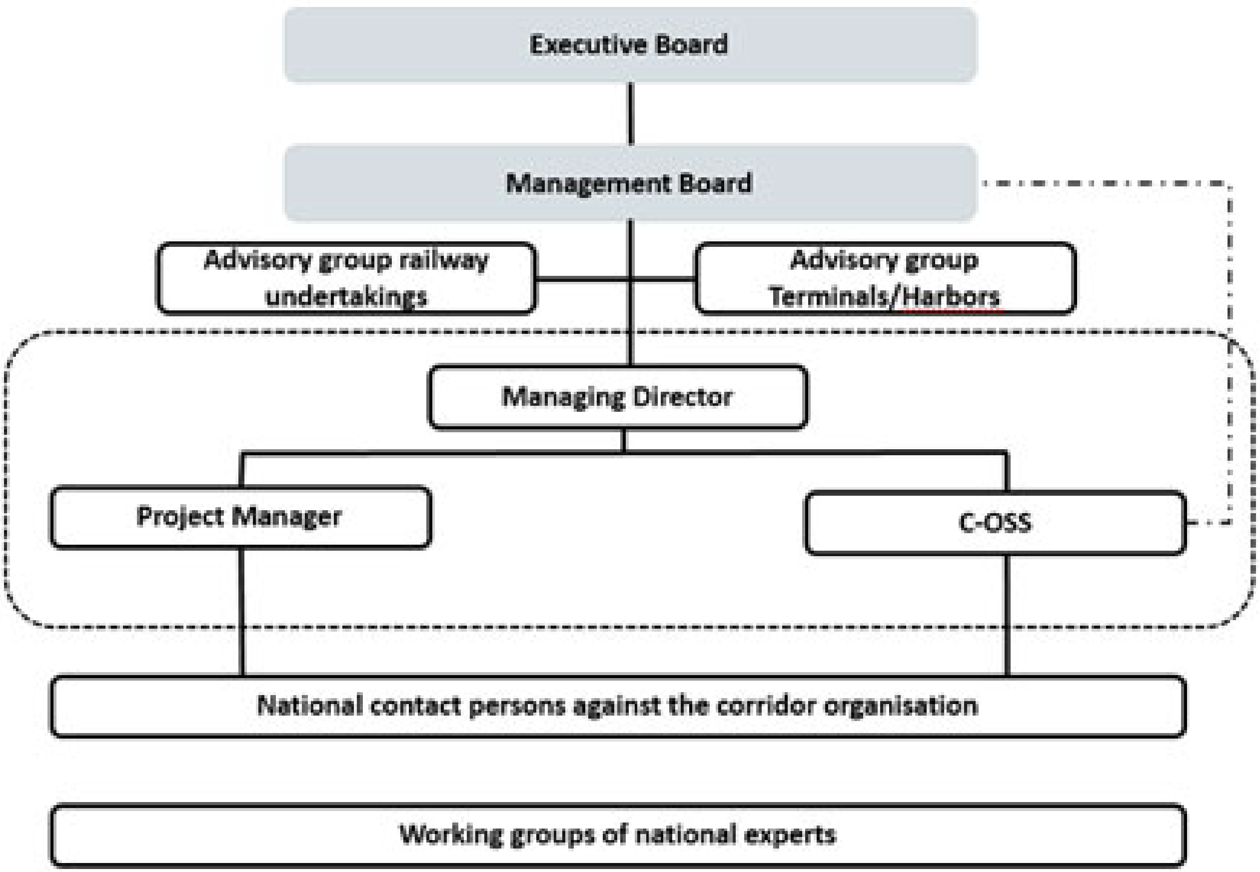
Rail Freight in DK (2008=100)

	2008	2010	2012	2014	2016	2018
Nationalt	100	133	137	138	152	135
Internationalt	100	58	47	63	91	76
Transit	100	135	140	148	152	155
I alt	**100**	**120**	**122**	**131**	**140**	**139**

European Rail Freight cooridors

www.tbst.dk

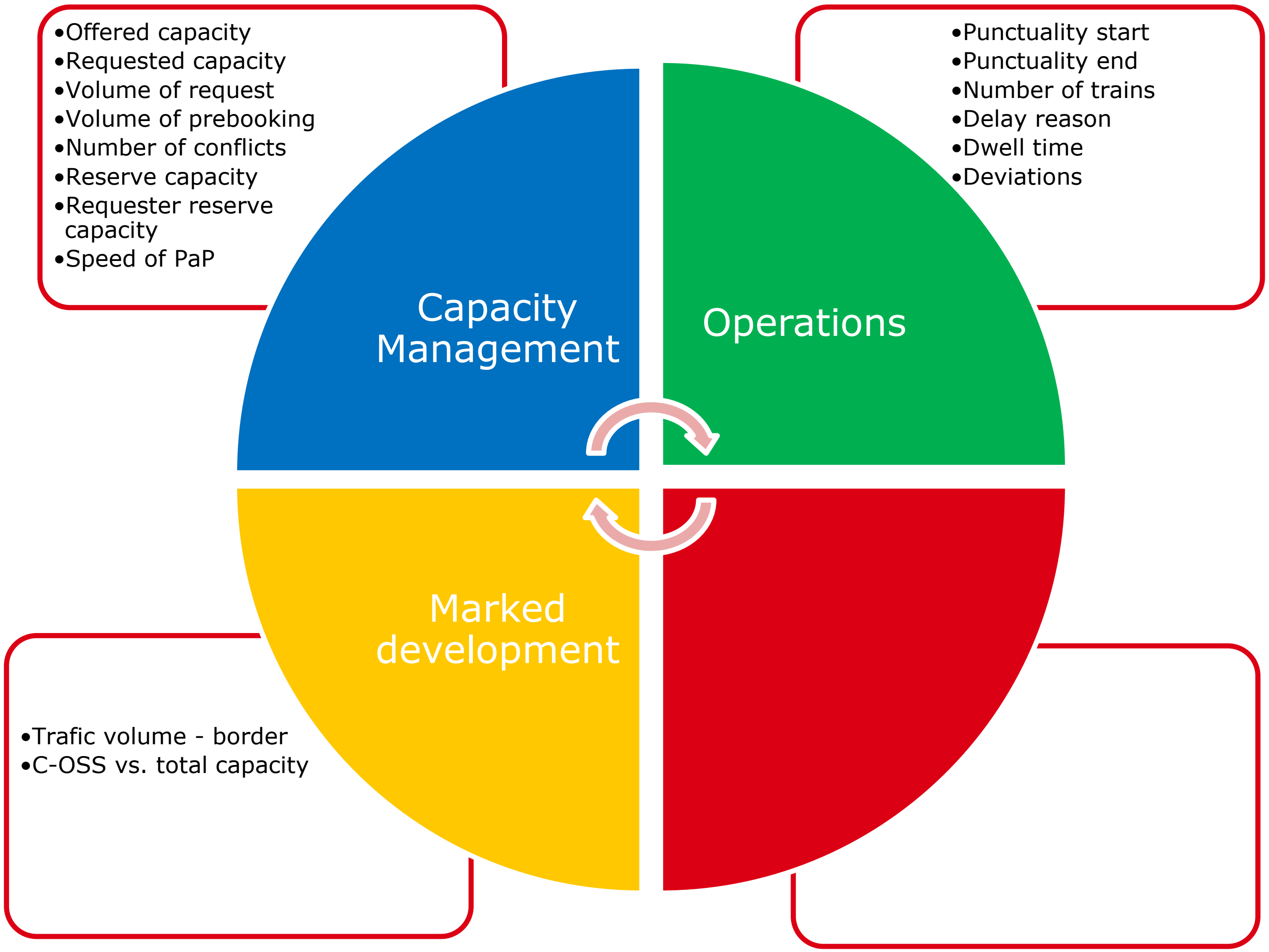
Corridor organisation (Scand-Med)



Use of KPI's as monitoring the performance of the rail freight corridors

- Article 19 (2) of Regulation (EU) 913/2010 requires the Management Board (MB) of the Rail Freight Corridors to *monitor the performance of rail freight services on the freight corridor and publish the results of this monitoring once a year*.
- Rail Net Europe (RNE) has made guidelines and a common proposal for MB KPI's

KPI's by RNE for IM's



Conclusion from the paper ”Imperfect competition in a network industry” *By Florent Laroche,*

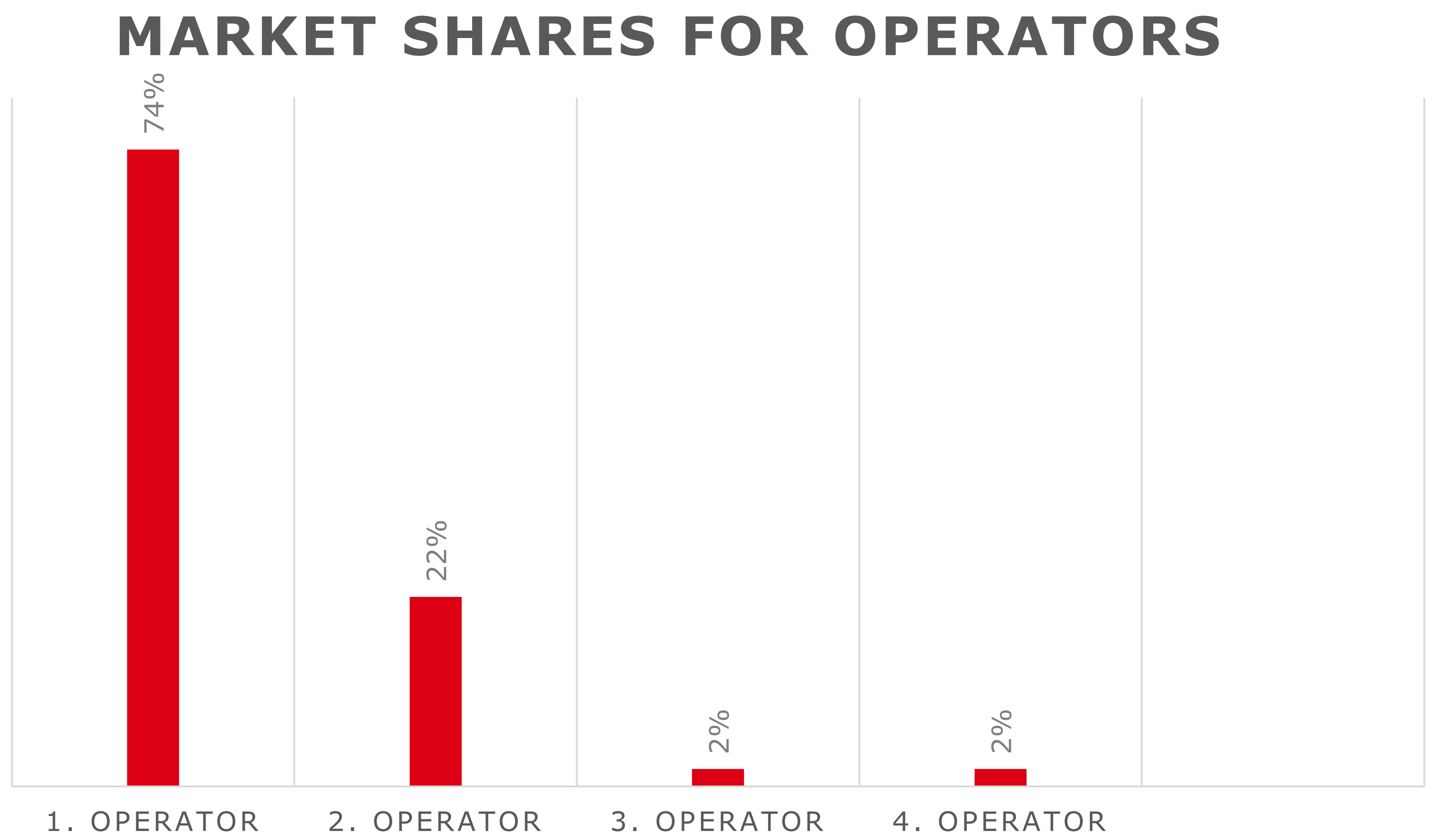
- Positive signs in the sector with an increase in number of newcomers, however…
  - Still many barriers for newcomers
  - Newcomers have challenges in terms of gaining marketshares
  - Over costs for operators makes competition hard
  - The market is still far from free competition

Conclusions from the paper ”Imperfect competition in a network industry”

Suggestions:

- Include financial data for all rail operators in public rail publications
- Implement a European transport agency with a strong monitoring focus on regulation and market
- Consider positive externalities in the rail freight sector when planning larger investments

Operators in Denmark 2018

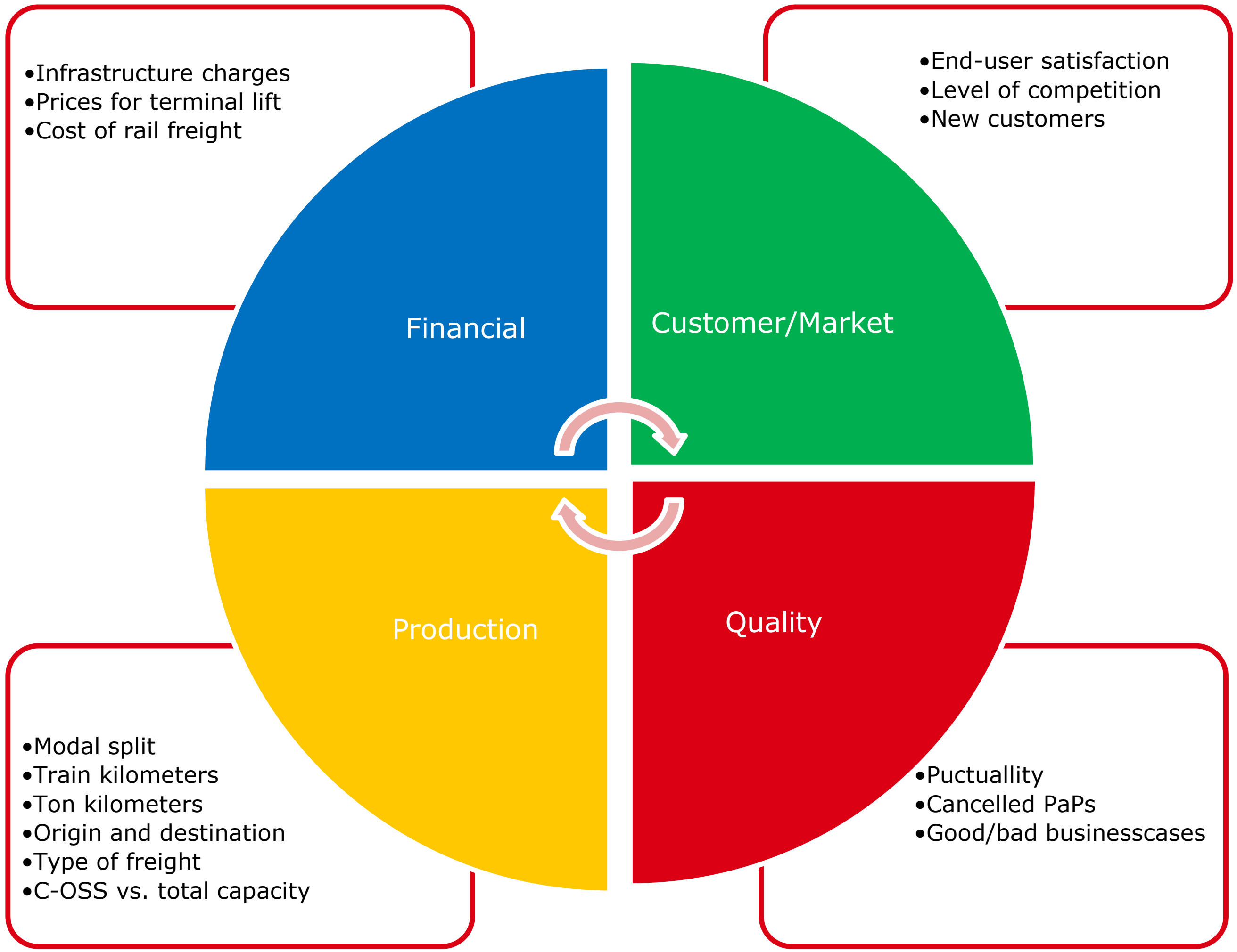


Paps and cancellations in Denmark

Train numbers of PaPs TT 2018

	Ordered PaPs	Running as ordered	Partly cancelled	Cancelled
Operator 1	21	1	13	7
Operator 2	10	7	3	0
Operator 3	3	3	0	0
Operator 4	2	0	0	2
Total	**36**	**11**	**16**	**9**

KPI's – EB-proposal



Ton pr. train kilometer in Denmark (2007-2015)

	2007	2009	2011	2013	2015	2017
Ton/Km	578	523	596	718	776	700

Tonnes pr. train kilometre in the Scan-Med countries 2010-2016

	2010	2012	2014	2016	Change
Norway	423	451	434	496	+17 pct.
Sweden	553	555	574	599	+8 pct.
Denmark	607	614	715	708	+17 pct.
Germany	(555)	452	451	576	+4 pct.
Austria	438	466	507	514	+17 pct.
Italy	456	483	488	511	+12 pct.

Tonnes pr. train kilometre in selected European countries 2010-2016

	2010	2012	2014	2016	Change
NL	679	786	800	806	+19 pct.
France	453	519	516	532	+17 pct.
Spain	357	398	402	423	+18 pct.
Poland	667	700	740	749	+12 pct.
Czechia	439	390	492	511	+16 pct.
UK	541	569	578	506	-6 pct.

Conclusions from the KPI-WS in Vienna

Identification of the most important KPI’s:

- The development in the cost of rail freight
- The efficiency of rail freight (ton/train kilometer)
- PAPs – number of cancelled
- Development in modal split – marked share for rail
- Origin and destination
- Quality and price KPIs for terminals
- Satisfaction of end-users
- “Good/bad business cases”
- Level of competition, number of newcomers in the market
- Type of freight

How difficult is it to identify the KPIs?

1. “Low hanging fruits”:

- Number of new operators
- Development in market share of biggest operators
- Infrastructure costs pr. train kilometer
- Average costs of terminal lifts
- Number of cancelled Pap

How difficult is it to identify the KPIs?

<u>2. Medium difficult</u>

- Train kilometers on the corridor.
- Business-case-stories (good and bad)
- Type of freight on the corridor
- Origin and destination

How difficult is it to identify the KPIs?

<u>3. Difficult – need a special approach</u>

- Modal share development in percent
- Development of ton kilometers on the corridor
- Ton pr. train-km on the corridor

<u>4. Imported KPI's from RNE</u>

- Punctuality in pct.
- C-OSS vs. total capacity

Taskforce process findings

Process:

- The KPIs are aimed at the ministry level – and therefore must be something EB should can handle
- Big difference in size of the countries on the corridor – this means, for some countries it is much easier to collect data than in other countries.
- We should be open to use estimates for KPI's where it is not possible to find the exact data.
- It needs to be decided how the KPI's should be presented and when?
- Cooperation with MB in the process in order not to make overlaps

Scand Med proces

- Number of new rail freight operators on the Scan-Med corridor in 2018.
- Development in the market share of the biggest operator from 2017 to 2018.
- Track access charges pr. kilometer for rail freight trains at the Scan-Med Corridor in 2017 and 2018.
- Average tariffs for a container lift, at the 3 largest terminals on the Scan-Med corridor in 2019.
- Number of cancelled PaPs on the Scan-Med corridor in 2018

Questions for discussion

- What are the most important obsticals for rail freight?
- What can/should be done in order to promote rail freight in Europe?
- What can/should be done to promote combined transport
- How should we monitor the development of rail freight in Europe – taking into account the different obticals for rail freight?