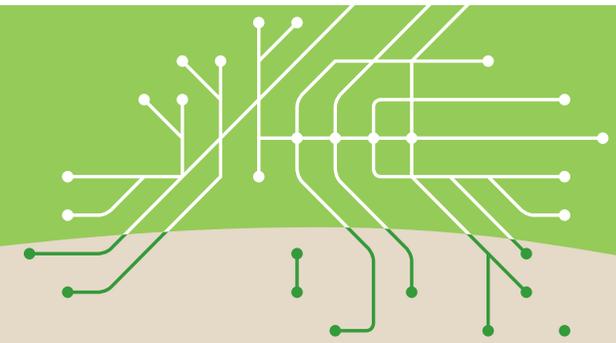




# RAIL

– a sustainable transport mode

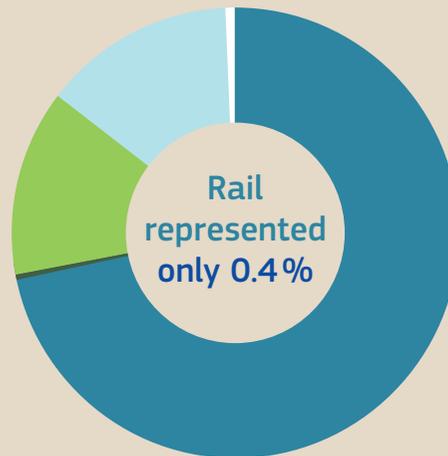


**A key contributor  
to the EU's 2050 climate neutrality goal**

### Greenhouse gas emissions by transport mode

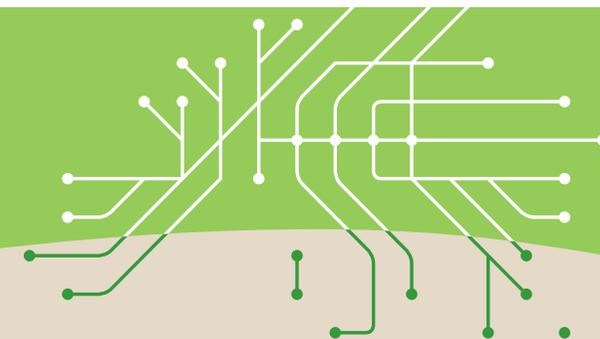
EU27 (2018)

- Rail 
- Waterborne 
- Air 
- Road 
- Other 

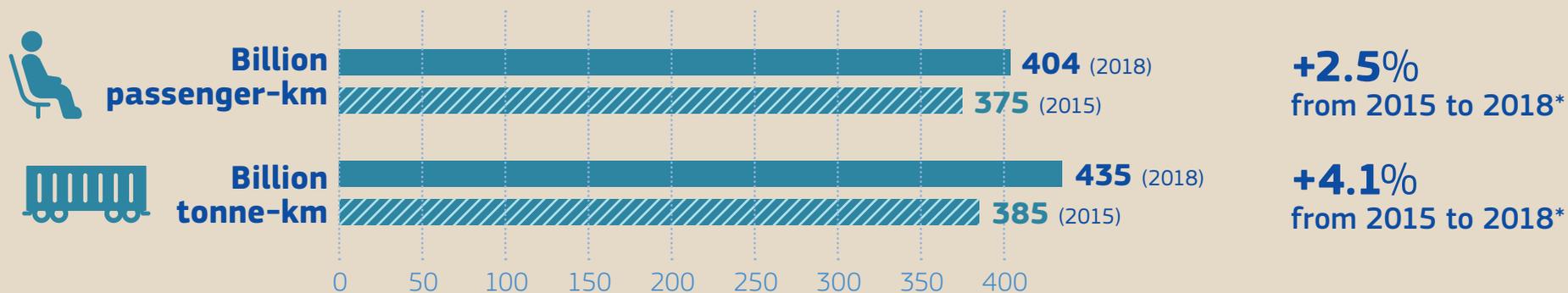


  
**Rail accounts  
for 1.9% of transport  
energy consumption**  
EU27 (2018)

# RAIL: WINNING OVER both passengers and goods



## Traffic development



## Proportion of cross-border traffic EU27 (2018)

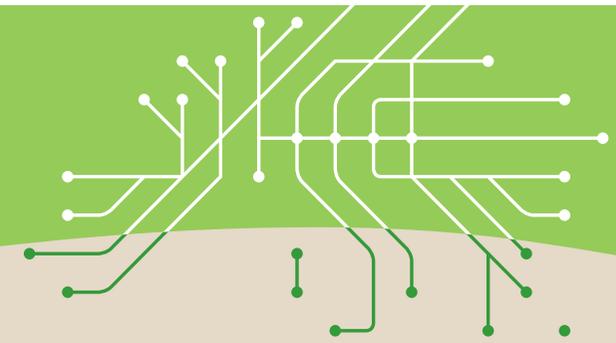
**7%**  
Passenger traffic



**52%**  
Freight traffic

\* Compound annual growth rate (CAGR)

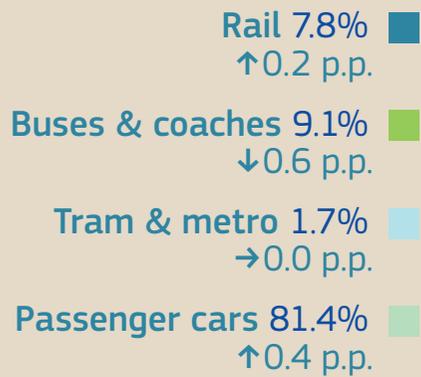
# RAIL TRANSPORT potential still underexploited



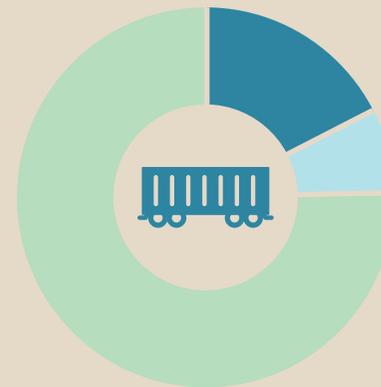
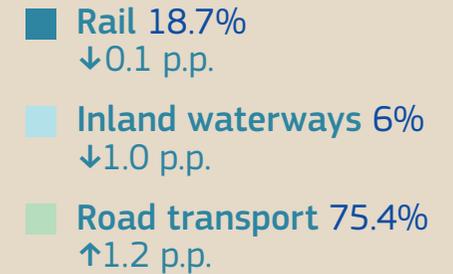
## Land modal share

EU27 (2015-2018)

### Passenger transport



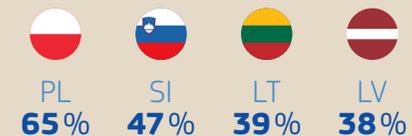
### Freight transport\*



# 80%

of all train kilometres run are passenger services

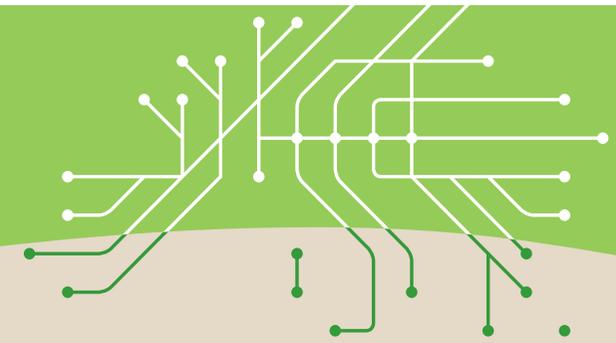
EU27 (2018)



\* excluding pipelines



# MORE CHOICE for passengers



## Rail market share of alternative operators

EU27 (2018)

- Alternative operators
- Incumbents

### National passenger markets

#### National commercial passenger markets



**10%**

↑2 p.p. since 2015



**14%**

↑2 p.p. since 2015

#### National PSO passenger markets



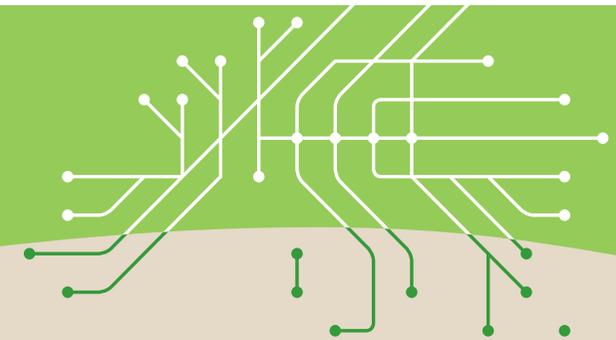
**16.2%**

↓0.5 p.p. since 2015

**60%**  
of rail passenger services\* are run under a public service obligation (PSO)  
EU27 (2018)

\*in passenger-km

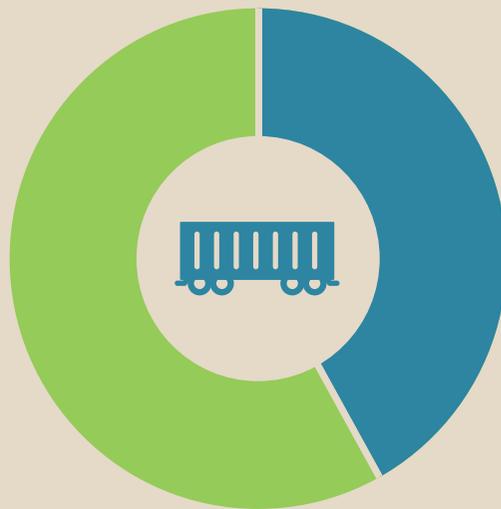
# A DYNAMIC FREIGHT MARKET and increasing congestion



## Freight market

EU27 (2018)

- Market share of alternative operators
- Market share of the incumbents



**42%**

↑8 p.p. since 2015

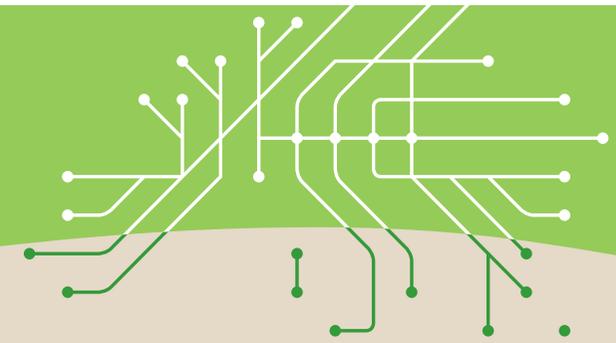
## A congested network

The length  
of tracks declared  
congested  
more than doubled  
between  
2015 and 2018.

In congestion,  
freight traffic  
(domestic  
& international)  
are seldom  
prioritised.



# CONNECTING people and businesses



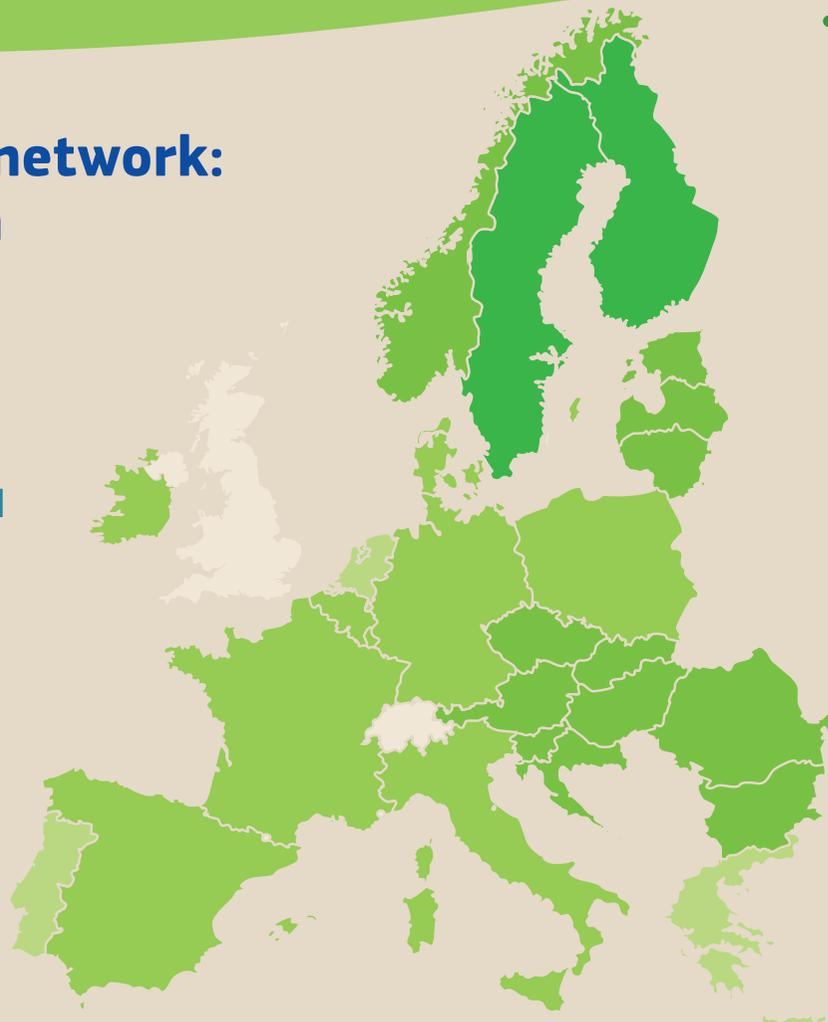
**Total length of rail network:**  
**201 000 km**  
EU27 (2018)

Around  
**75%**

of total train-kilometres travelled  
by electricity-powered trains

**9 169 km**

**High-speed network** by the end of 2019  
**+ 1 300 km (+17%)** between 2015 and 2019

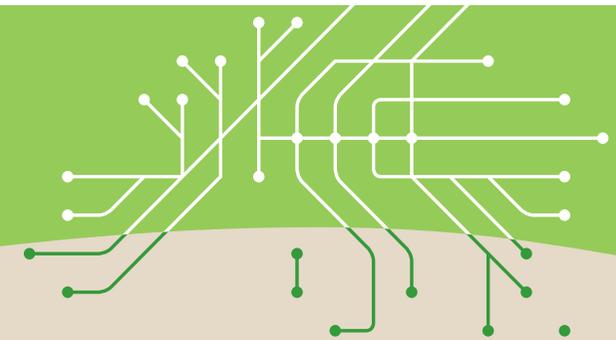


**Average distance  
between stations  
in the EU27 (2018)**  
**6.9 Km**

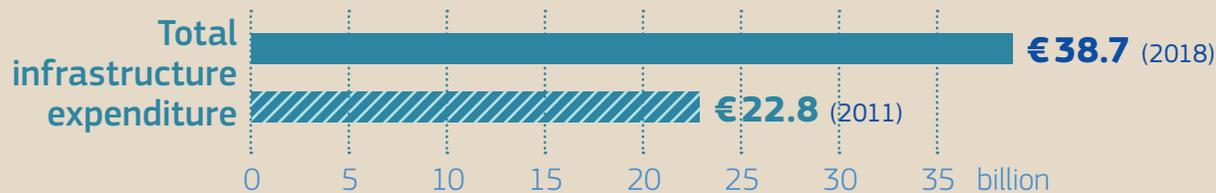
- Length of network  
per million people  
(2018)**
- Over 1 000 line-km
  - 500 – 1 000 line-km
  - 250 – 500 line-km
  - Under 250 line-km



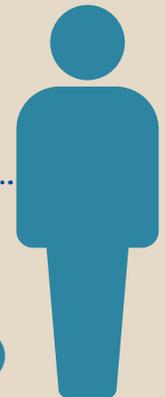
# PUBLIC FUNDING IS ESSENTIAL for infrastructure operation and investment



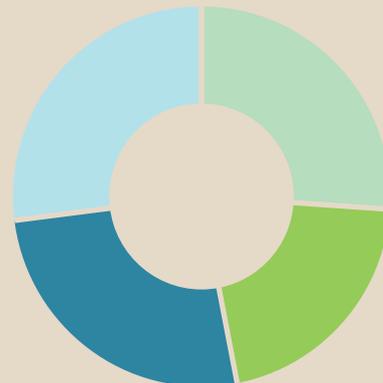
## Rail infrastructure expenditure EU27



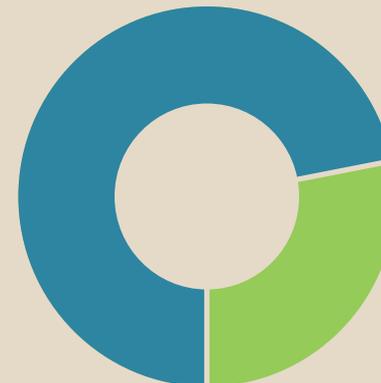
EUR **87**  
infrastructure  
expenditure  
per inhabitant  
in 2018 (EU27)



Maintenance 26%  
Renewals 27%  
Upgrades 26%  
New infrastructure 21%  
(2018)

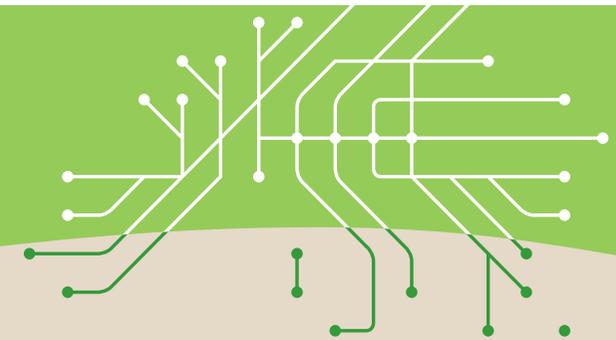


72.3% National budgets  
27.7% EU co-financing  
+ other sources  
(2018)

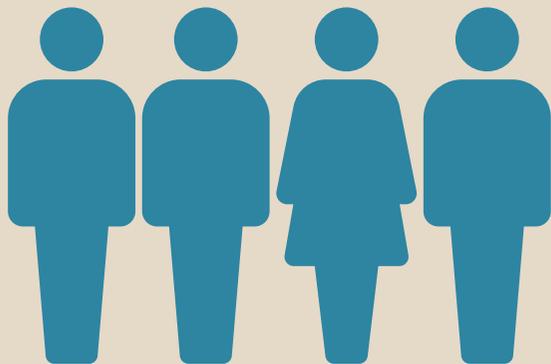




# THE RAIL SECTOR REMAINS a key employer in the EU economy



In 2018 over **916 000** people were employed in the EU27 railway sector



Staff employed by  
railway undertakings  
**527 000**  
(2018)



Staff employed by  
infrastructure managers  
**389 000**  
(2018)

## Demand for new talent in rail persists

Proportion of staff of main railway undertakings older than 50 years



Proportion of staff of main infrastructure managers older than 50 years



Proportion of women in railway workforce

