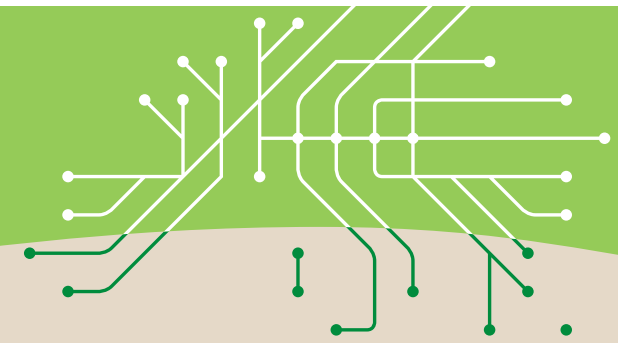




RAIL

– a sustainable transport mode

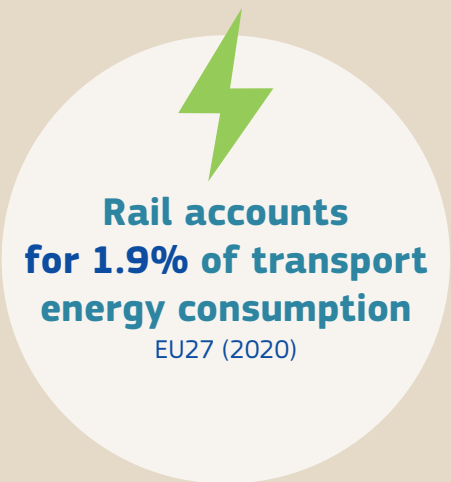
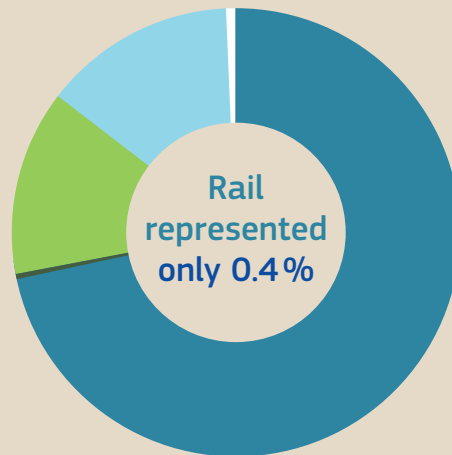


**A key contributor
to the EU's 2050 climate neutrality goal**

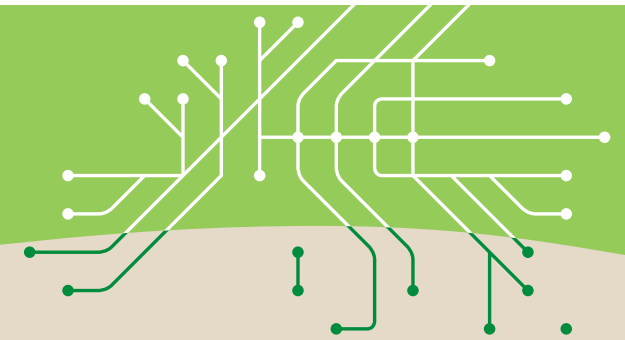
Greenhouse gas emissions by transport mode

EU27 (2020)

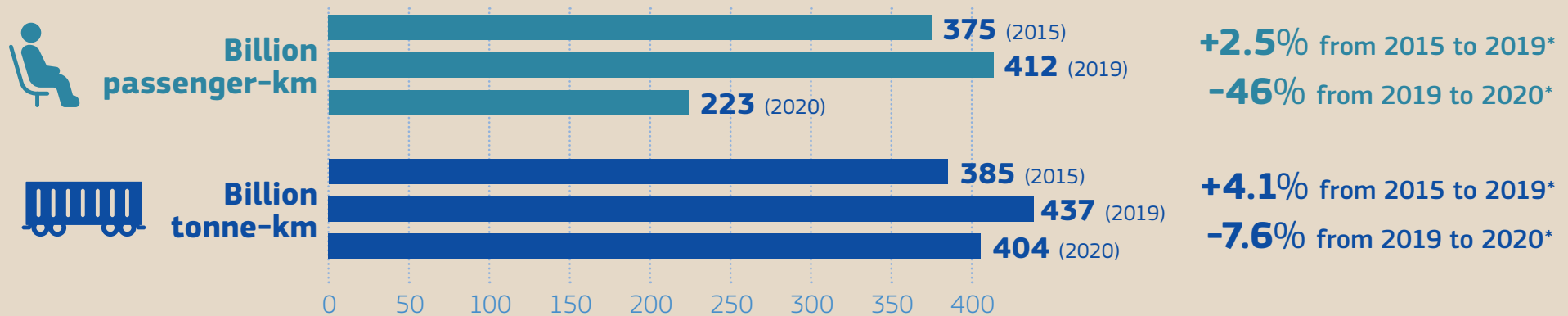
- Rail
- Waterborne
- Air
- Road
- Other



COVID-19: effects on rail transport volumes



Traffic development



Proportion of traffic types crossing borders EU27 (2020)

3.6%
Passenger traffic

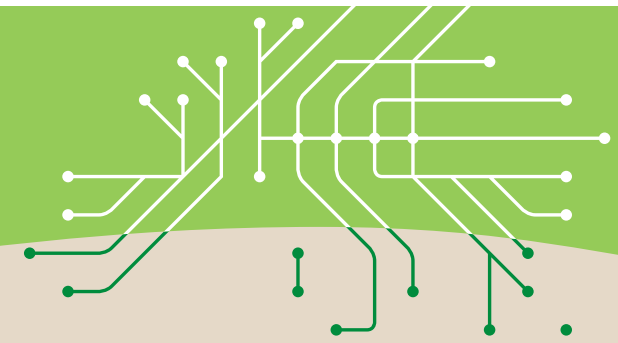


53%
Freight traffic

* Compound annual growth rate (CAGR)



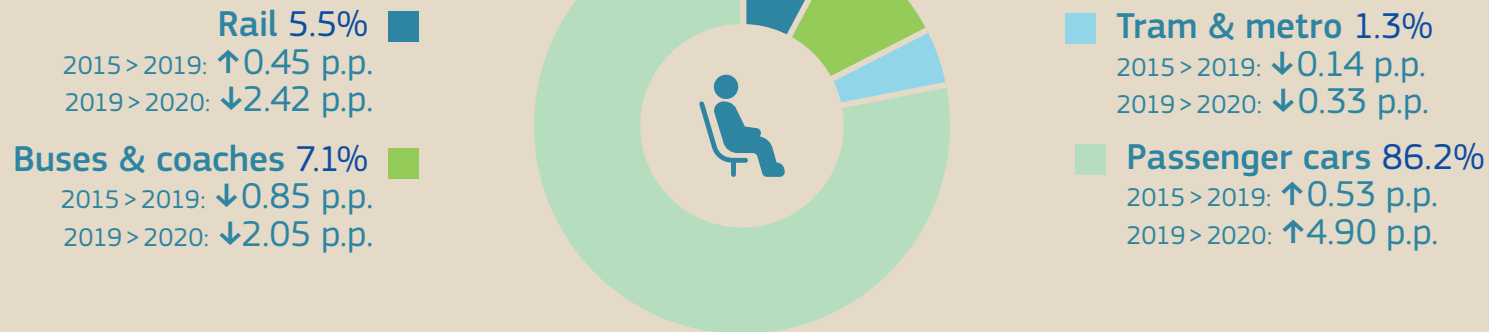
PASSENGER RAIL: potential still underexploited



Land modal share

EU27 (2020)

Passenger transport



79%

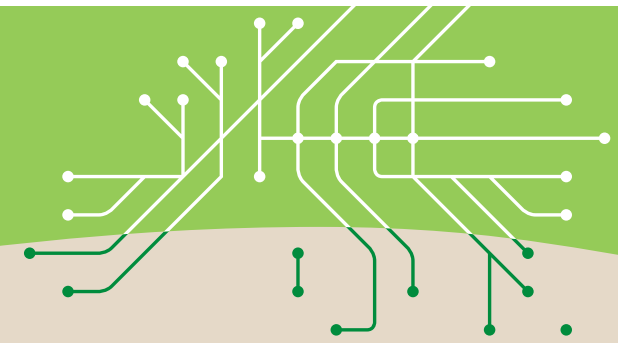
of all train kilometres run are passenger services

EU27 (2020)





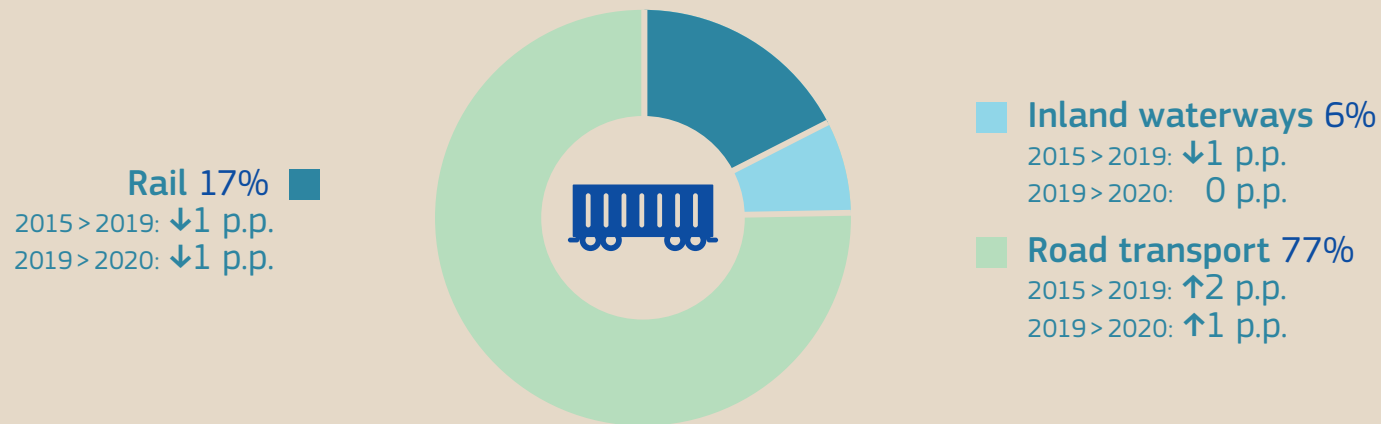
RAIL FREIGHT: potential still underexploited



Land modal share

EU27 (2020)

Freight transport*



21 %

of all train kilometres run are freight services

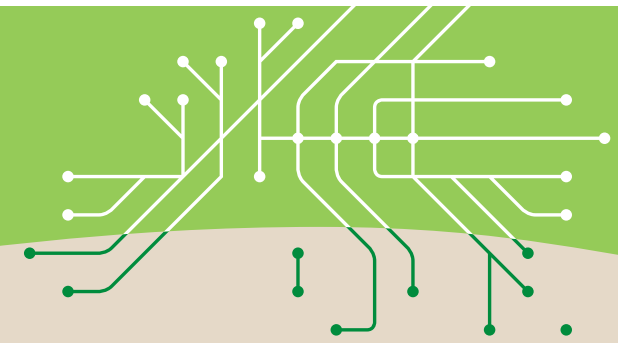
EU27 (2020)



* excluding pipelines



OFFERING OPTIONS to rail passengers



Market share: alternative rail operators

EU27 (2020)

- Alternative operators
- Incumbents

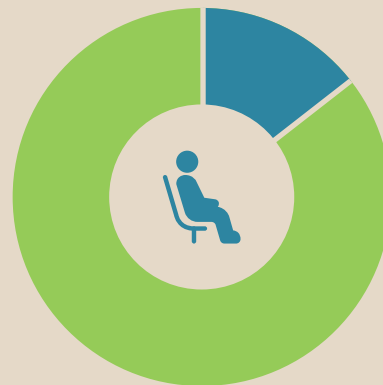
National passenger markets

National commercial passenger markets



6.6%

-1.9% compared to 2015



14.4%

+2% compared to 2015

National PSO passenger markets

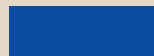


18.5%

+1.9% compared to 2015

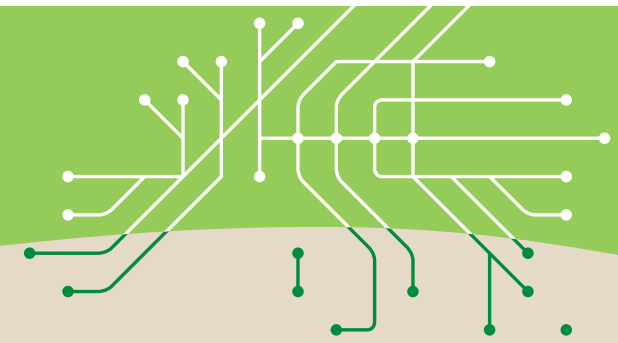
66%
of rail passenger services* are run under a public service obligation (PSO)
EU27 (2020)

*in passenger-km





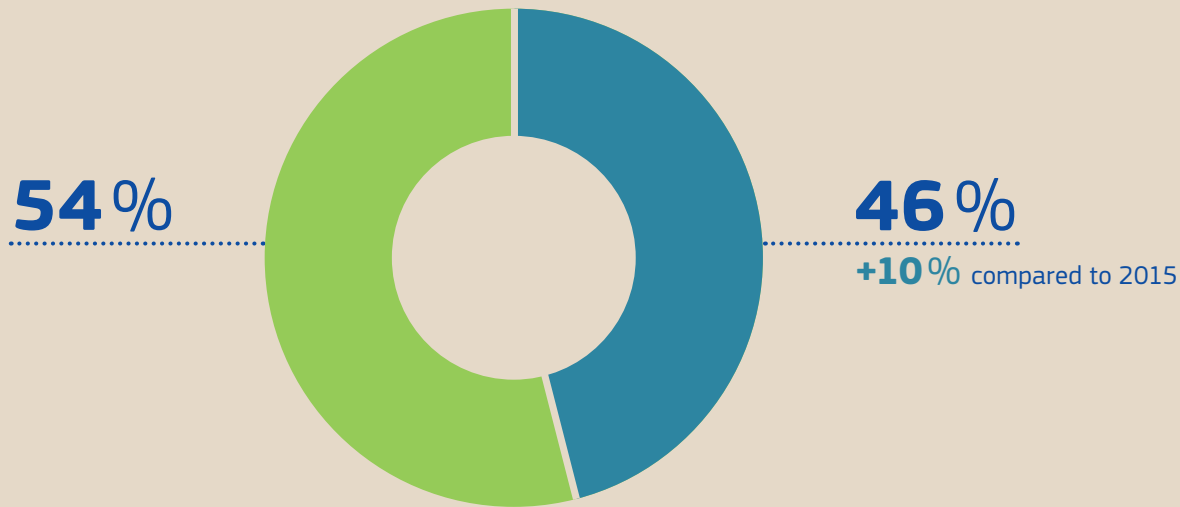
A DYNAMIC FREIGHT MARKET and increasing congestion



Freight market

EU27 (2020)

- Market share of alternative operators
- Market share of incumbents

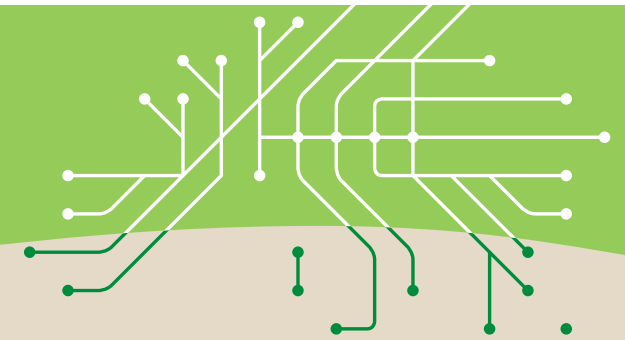


A congested network

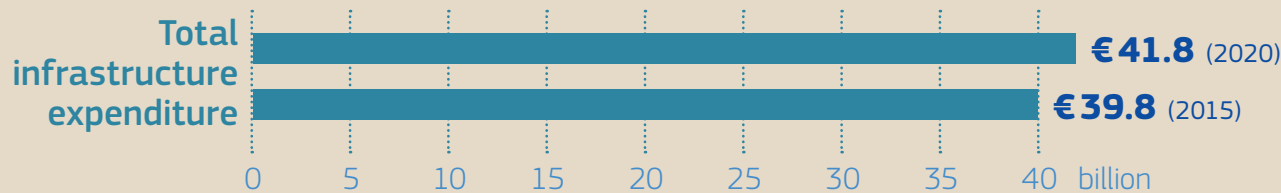
During congestion, freight traffic (domestic & international) is seldom prioritised.



PUBLIC FUNDING IS ESSENTIAL for infrastructure operation and investment

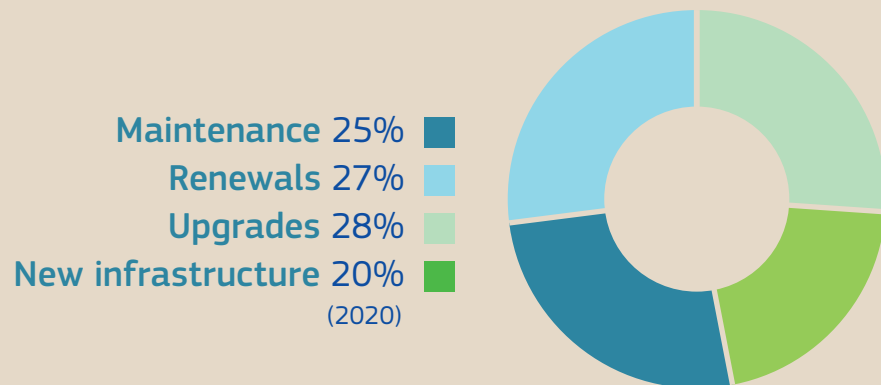
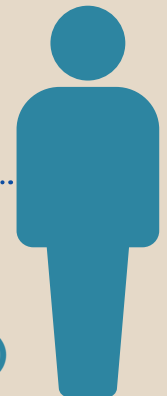


Rail infrastructure expenditure EU27



€94

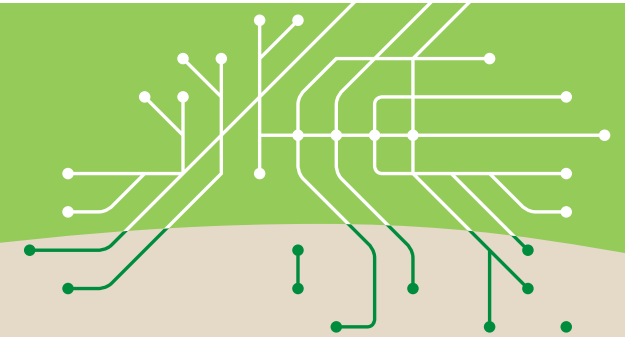
infrastructure expenditure per inhabitant in 2020 (EU27)



69% National budgets
31% EU co-financing + other sources (2020)



THE RAIL SECTOR REMAINS a key employer in the EU economy



In 2020 over **910 000** people were employed in the EU27 railway sector



Staff employed by
railway undertakings
523 000
(2020)



Staff employed by
infrastructure managers
387 000
(2020)

Demand for new talent in rail persists

Proportion of main railway undertaking staff older than 50 years



Proportion of main infrastructure manager staff older than 50 years

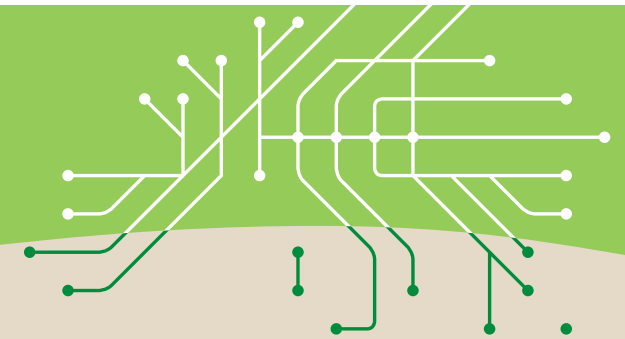


Proportion of women in railway workforce





CONNECTING people and businesses



Total length of rail network:
200 100 km
EU27 (2020)

Around

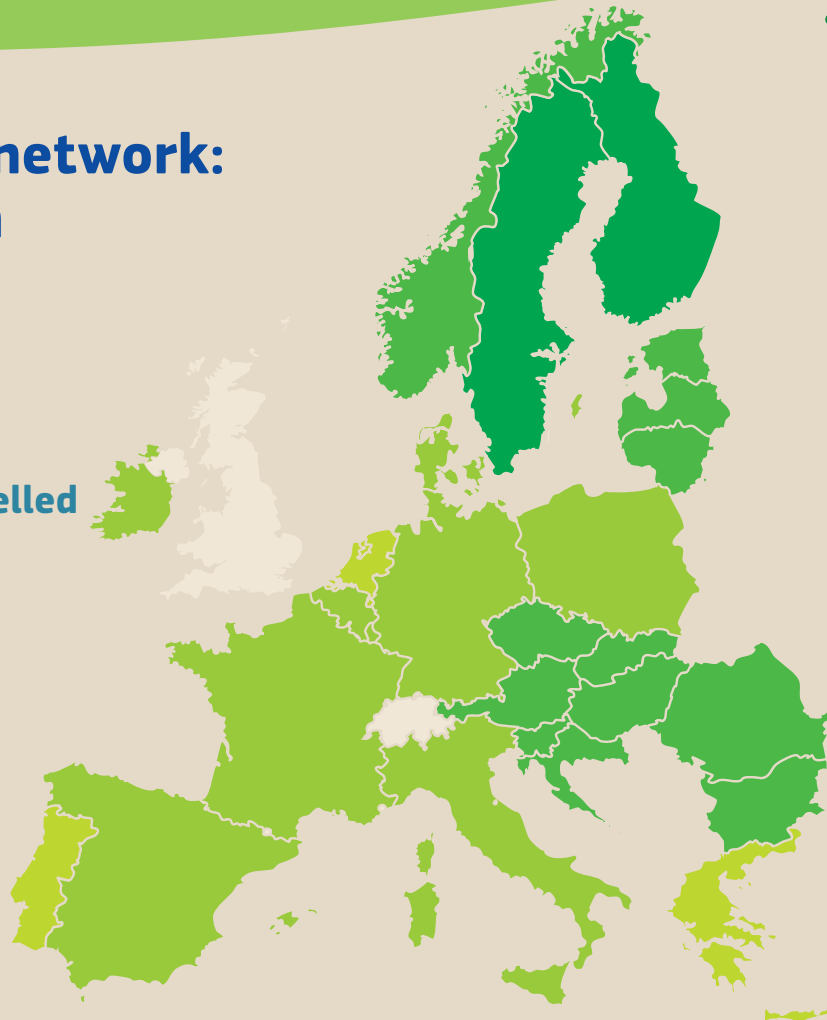
81.6%

of total train-kilometres are travelled
by electricity-powered trains

High-speed network by the end of 2020

11 526 km

+ 1 464 km (+13%) compared to 2015



**Average distance
between stations
in the EU27 (2020)**
6.7 Km

**Length of network
per million people**
(2020)

- Over 1 000 line-km
- 500 – 1 000 line-km
- 250 – 500 line-km
- Under 250 line-km