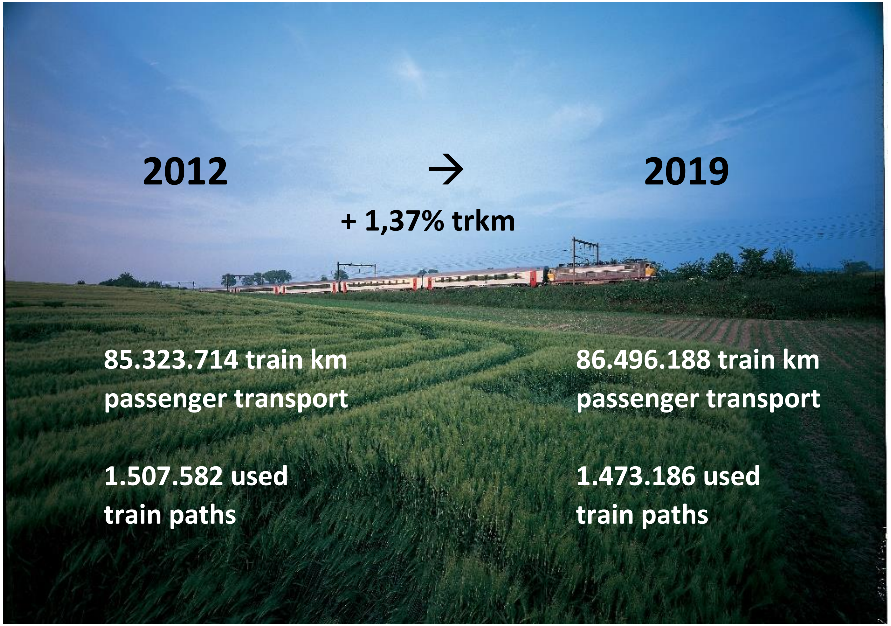
CONTENTS RAIL MONITOR PASSENGER TRANSPORT



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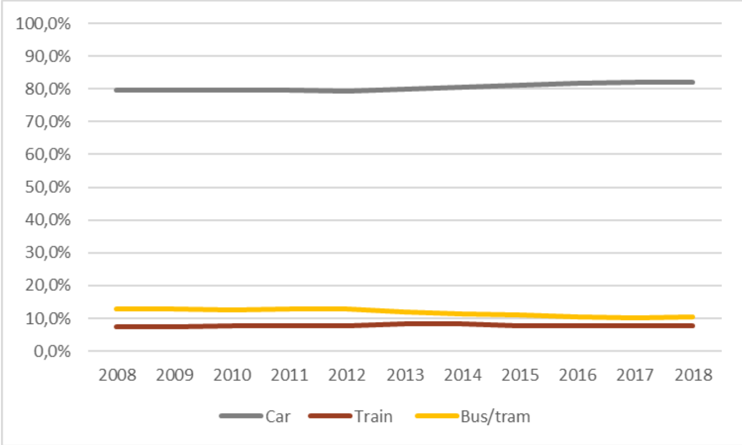
01 » RAIL IN THE TRANSPORT SECTOR

Passenger transport by mode

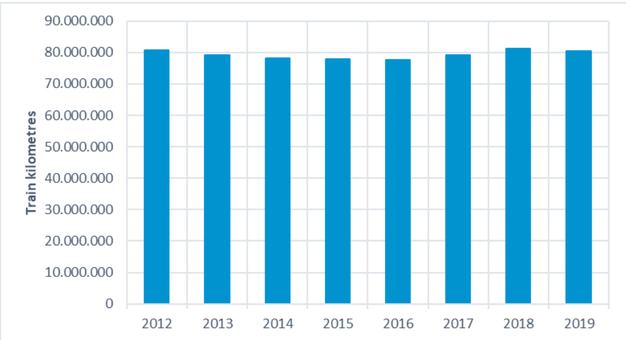
Rail has only a limited share in passenger transport (**almost 8%**). Approximately 80% prefer to use a car.

The share of the various modes of transport has remained relatively stable in recent decades. However, the proportion of train passengers has slightly increased over the past two years, initially mainly at the expense of bus and tram.



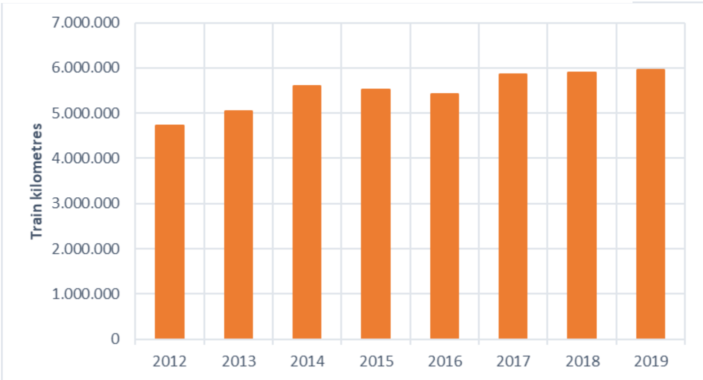
Evolution national passenger transport

National passenger transport - in train kilometres – remained relatively stable compared to 2012. In 2019, **approximately 80.5 million national train kilometres** were covered.



Evolution international transport

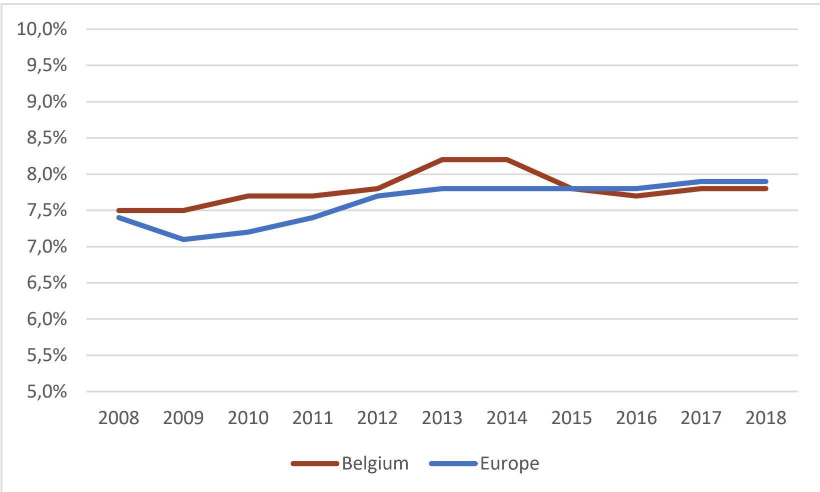
International passenger transport has **increased by 26%** since 2012. In 2019, **almost 6 million train kilometres** were covered.



Position Belgium in the modal split

Belgium has a similar share of rail passengers in the modal split compared to the European Union average.

The European share varies from about 1% in Lithuania and 2% in Estonia to about 11.4% in the Netherlands and about 19.7% in Switzerland.

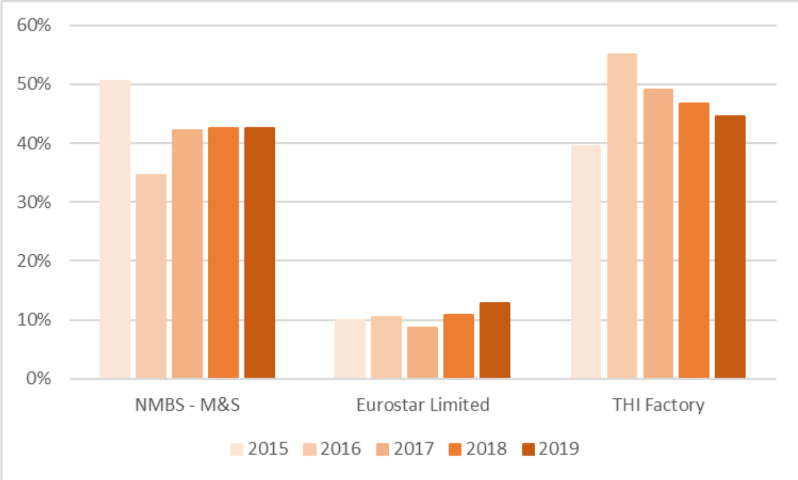


02 » COMPETITION WITHIN RAIL TRANSPORT

Market share of new entrants

In 2019, there was only competition on the international passenger market.

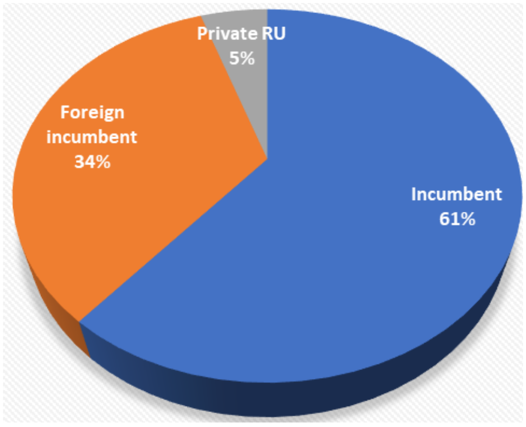
New entrants held almost **60%** of the market (in train kilometres). However, the growth of "new entrants" has remained fairly stable in recent years.



Overview of share ownership

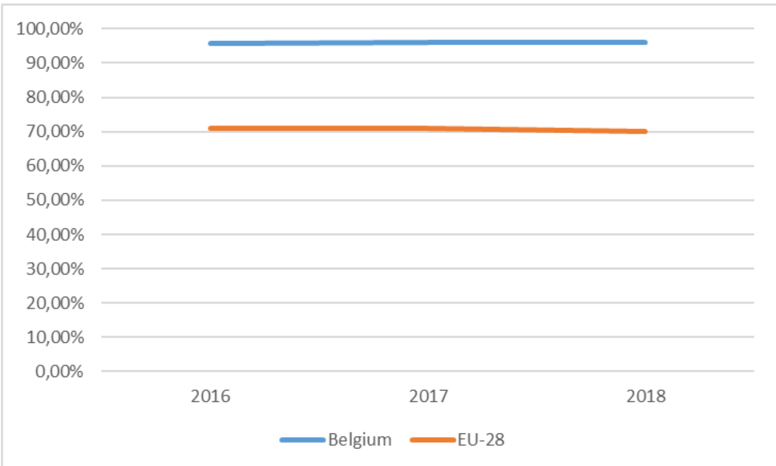
"New entrants" are not independent organisations. They have various links to domestic and foreign historical operators.

In 2019, only **5%** of the market was actually owned by **private companies** (in shares). One foreign historical operator held 34% of the market, while the Belgian historical operator still held 61% of the market. In 2014, this share amounted to 90%.



Position of Belgium in incumbent share

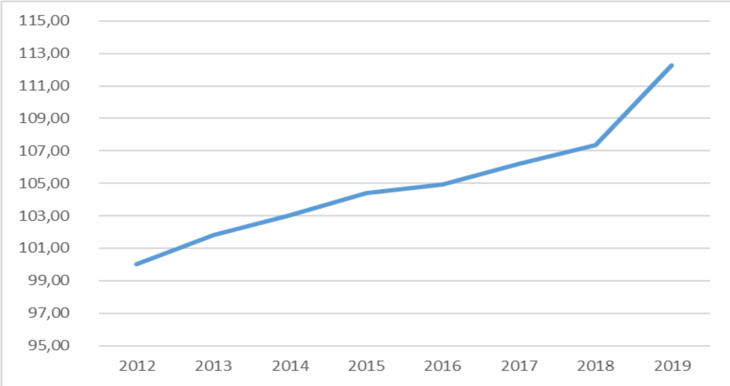
Since the national passenger transport in Belgium - accounting for >90% train kilometres - is entirely provided by the historical operator, the share in total passenger transport is very high compared to the rest of Europe. On average, historical operators in Europe have a share of around **70%** (figure 2018), ranging from 1% in the UK and 40% in Poland to 100% in Bulgaria, Croatia, Luxembourg, and Spain, among others.



03 » OPERATIONAL FUNCTIONING OF RAIL TRANSPORT

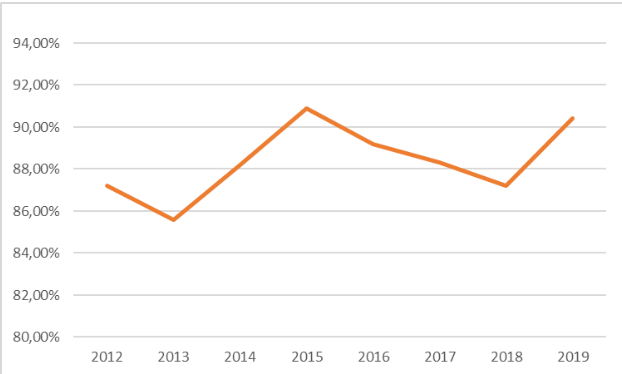
Evolution passengers per train kilometre

The number of passengers per train kilometre (and per train) has increased linearly by about 1% in recent years. In 2019, this even increased by 4.5%. This is mainly due to the large increase in the number of domestic passengers from approximately 244 to 253 million passengers.



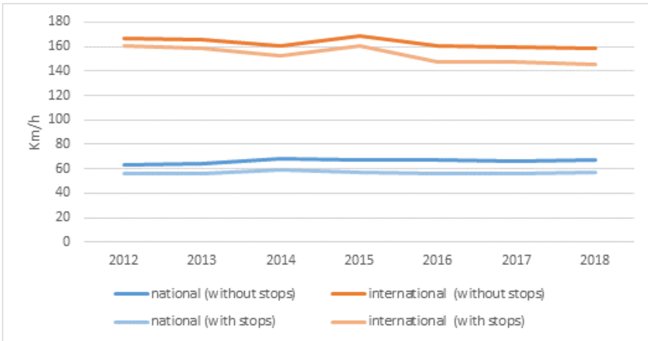
Evolution of punctuality figures

In 2019, just over **90%** of the (not cancelled) trains ran on time, i.e. with a delay of less than 6 minutes. In addition, just over 2% of the trains were completely or partially cancelled. Approximately 18% were cancelled by Infrabel, 33% by the RU itself, while the remaining 49% were cancelled due to third parties or for other reasons.



Average speed

On average, **national** passenger trains run at a speed of **approximately 66.7 km/h**, while **international** trains run just under **160 km/h** (without stops).



Share of non-effective train kilometres

The number of last-minute cancellations of passenger trains shows a positive evolution and currently amounts to **less than 5%** of the total train kilometres requested.

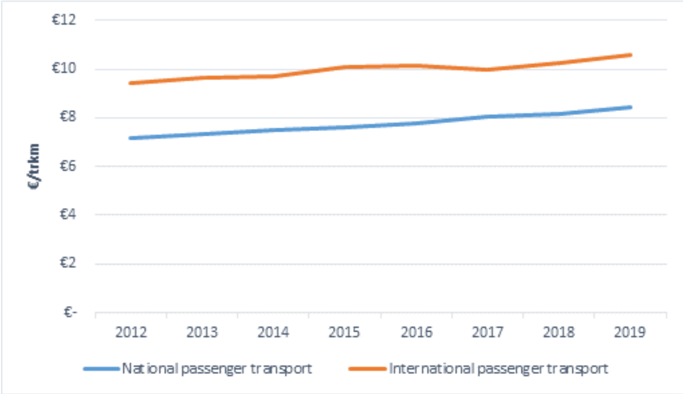
This costed the passenger sector almost 4 million EUR in charges in 2019 (cf. Your Moves).

04 » CHARGES INFRASTRUCTURE MANAGER

Evolution of charges per train kilometre

Railway undertakings pay **approximately 8.5 EUR** per train kilometre for **national** and **10.6 EUR per train kilometre** for **international** passenger transport.

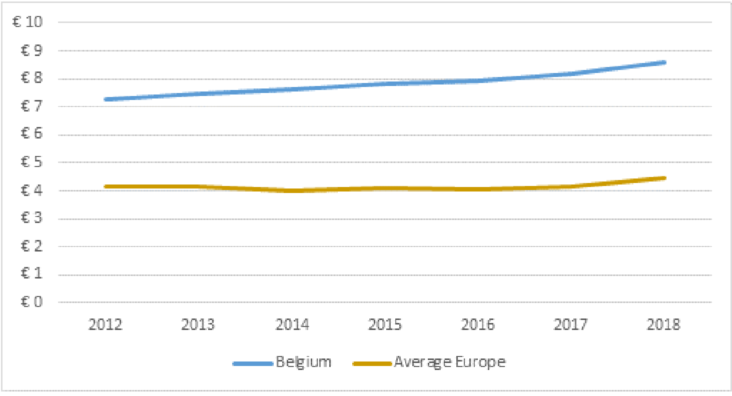
From the 2021 timetable onwards, these amounts will be revised on the basis of new charging principles (direct costs).



Position Belgium user charge amount

Compared to the rest of Europe, operators in Belgium pay a relatively high charge to use the passenger transport network. In Europe, the average is **4.48 EUR** per train kilometre.

In France, passenger operators pay on average 8.85 EUR per train kilometre, 1.76 EUR in the Netherlands, and 5.31 EUR in Germany.

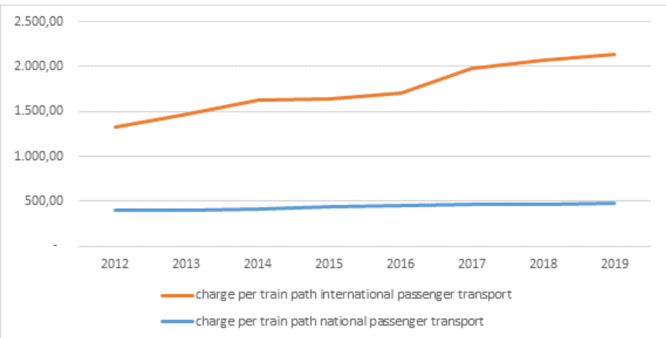


Breakdown infrastructure manager turnover

Infrabel derives **approximately 69%** of its turnover from the **infrastructure charge**; 10% comes from operating subsidies, 11% from energy, and 11% from other sources.

Approximately **745.2 million EUR** or almost **95%** of the **infrastructure charge** is paid **by passenger operators**.

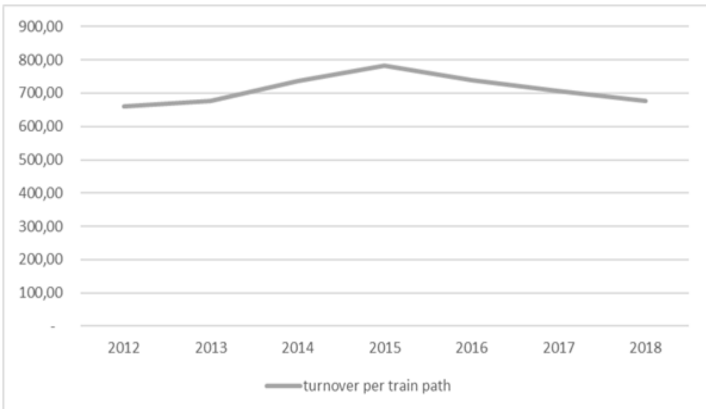
Charge per train path



Turnover number of train paths

The graph below shows how much turnover Infrabel generates on average per train path. In 2018, this was just under **700 EUR for one train path** (on average).

By way of comparison, a passenger operator has to pay on average 500 EUR for a national train path and even more than 2,000 EUR for an international train path.

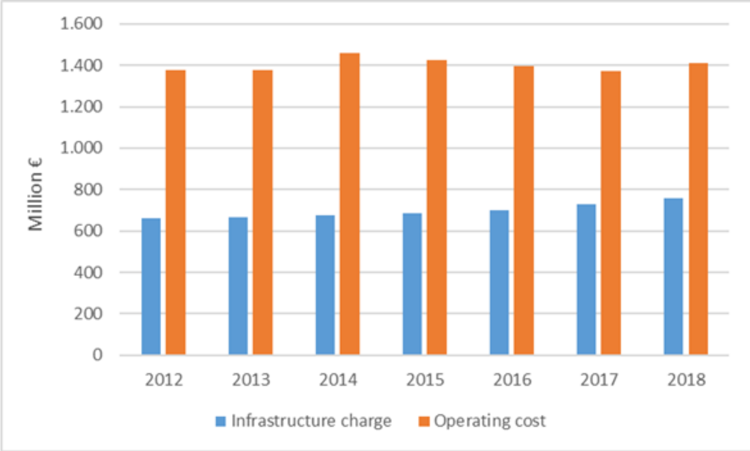


04 » CHARGES INFRASTRUCTURE MANAGER

Operating costs vs. Infrastructure charge

In 2018, the **infrastructure charge covered approximately 54% of the operating costs** (i.e. operating expenses excluding depreciation, write-downs, and provisions). The share of passenger transport amounted to more than 95%.

In 2018, **operating subsidies** covered **approximately 8%** of the operating costs, i.e. a further decrease compared



Investments of Infrabel

Infrabel continues to invest each year in rail, both for passenger transport and freight transport. The largest item has been **capacity maintenance** for years.