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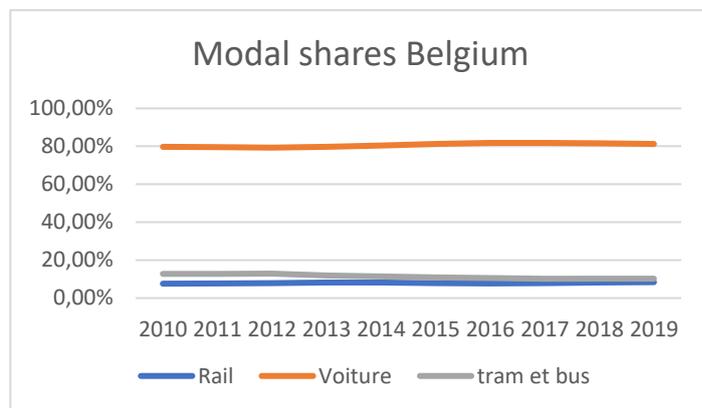


01 » THE SHARE OF RAIL IN THE TRANSPORT SECTOR

Passenger transport per mode

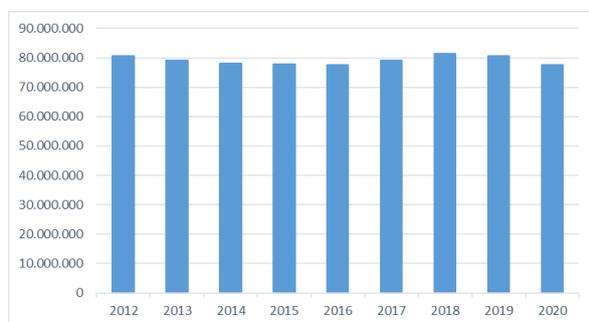
The share of rail in passenger transport remains modest at **8.4% in 2019**. Figures for 2020 are not yet available at the time of publication of this report.

The share of cars is over 81%, and that of buses and trams just over 10%. The modal split has remained relatively stable in recent years. This means that proactive and effective measures will have to be taken if we wish to encourage the modal shift advocated by many stakeholders.



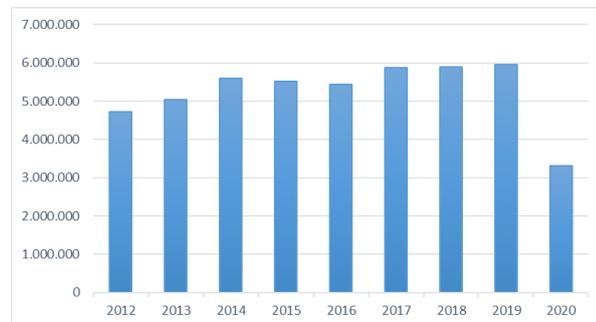
Evolution of national passenger transport

National passenger transport has remained relatively stable since 2012. In 2020, there were about **79.5 million** domestic train-kms, **slightly down (3.8%)** compared to 2019. This limited impact can be explained by the fact that during the health crisis, SNCB made every effort to maintain as much as possible its offer with adapted services. In Europe, the decline during this crisis was around 11%.



Evolution of international transport

After an overall increase since 2012 until 2019, international passenger transport collapsed in 2020, with only **3,311,740 train-kms** compared to 5,974,000 train-kms in 2019, a **drop of 44.6%**.

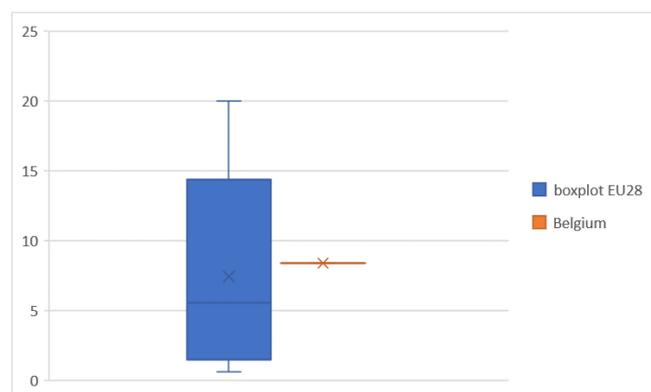


Belgium's position in the modal split

The share of rail in Belgium is **slightly above the European average**.

In Europe, the share of rail varies from 1% in Lithuania and Greece to 12.9% in Austria, and even 20% in Switzerland.

Belgium ranks 10th among European countries in terms of the importance of the rail share. However, it is behind our Dutch (11.3%), French (10.4%), and German (9.4%) neighbours.

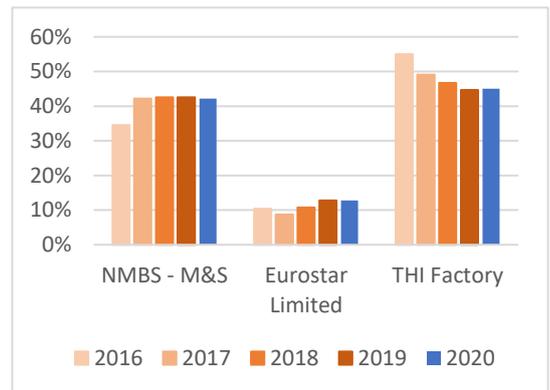


02 » COMPETITION IN PASSENGER TRANSPORT

Market shares of international operators

Until 2020, only the international passenger transport segment faced effective competition.

Overall, in a context of a shrinking market size, the shares held by each of the stakeholders remained relatively **stable** in 2020.

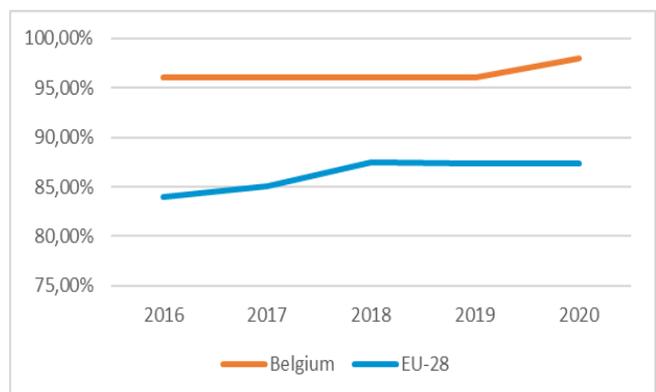
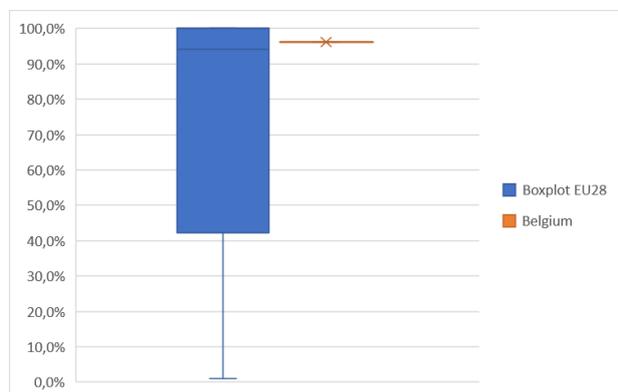


Belgium's position with regard to the incumbent's share

The Covid crisis allowed **SNCB** to strengthen its market share (to **98%**) insofar as it globally maintained its transport offer, and at the same time, international rail transport (where competition is open) fell sharply.

The Belgian incumbent's market share is well **above the European average (cf. 86.6%)**. Within the EU28, the market share varies from 0% (in the United Kingdom, where rail passenger transport is fully privatised) to 100% in several countries.

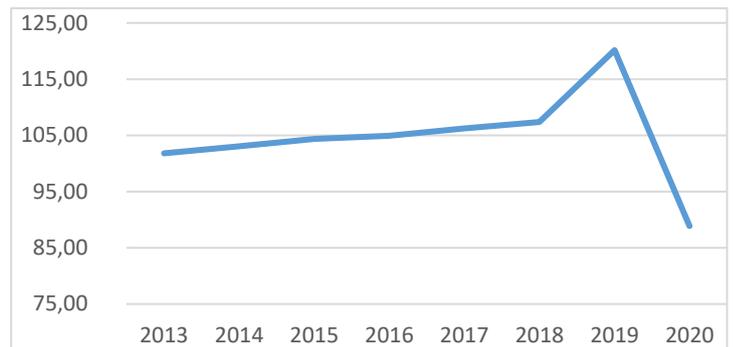
In our neighbouring countries, the incumbent's share is 100% in France and in Luxembourg, 95% in the Netherlands, and 71% in Germany. It should be noted that the incumbent's share is significantly lower in Germany, as some *Länder* conceded the regional service to competitors of DB.



03 » PERFORMANCE INDICATORS

Evolution of passengers per train-kilometre

In 2020, in the context of the health crisis, the number of passengers per train-km fell sharply. While the number of kilometres travelled remained relatively stable, the number of passengers carried fell considerably, from 253 million to 184 million.

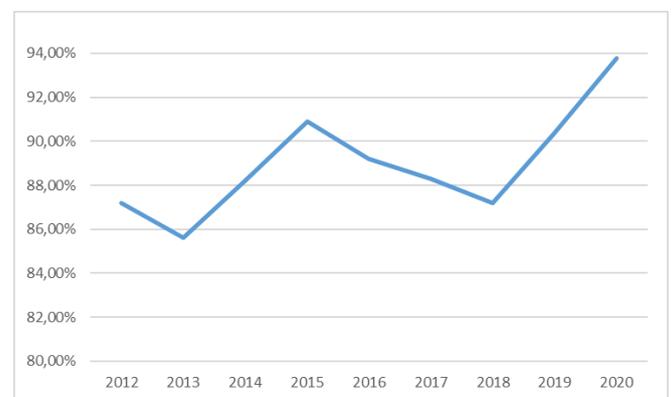


In this context, railway undertakings are wondering whether pre-crisis traffic levels are conceivable, while certain practices, such as teleworking, are developing.

Evolution of punctuality

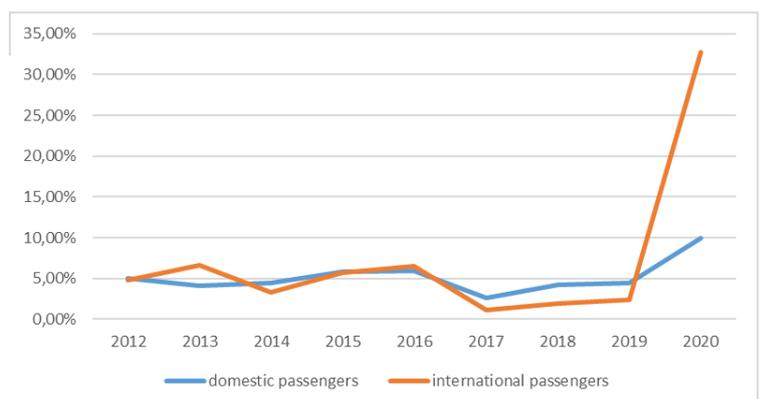
In 2020, there were **almost 94%** punctual trains (non-cancelled trains with a delay of less than 6 minutes). The increase in punctuality can be explained by the fact that there were fewer trains running on the network.

Of the 23,158 non-punctual trains, almost 30% were cancelled. As regards the causes of the delays, 26.2% were caused by Infrabel, 30.6% by the SNCB/NMBS, 38.2% by third parties, and 4.6% by other railway undertakings.



Number of non-effective passenger trains

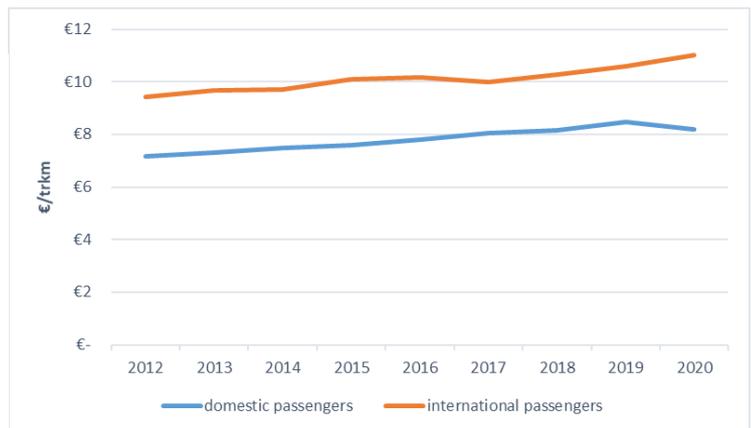
In 2020, there was a sharp increase in non-effective passenger trains in the **national** segment (up to **10% compared to 5% in 2019**). The increase is spectacular for **international** passenger transport where the proportion of non-effective trains **exceeds 50%**. The unused train paths reflected in the increase in non-effective passenger trains will have generated costs which have been partially compensated for by additional subsidies.



04 » TARIFFS FOR THE USE OF THE INFRASTRUCTURE

Evolution of tariffs per train-kilometre

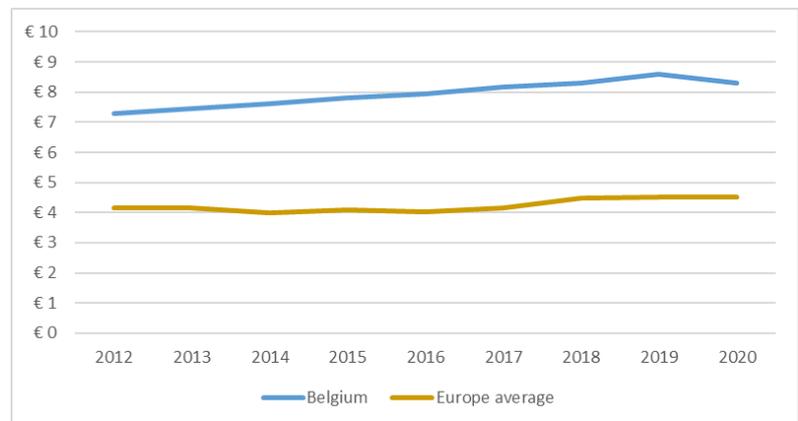
Railway undertakings paid a charge of about **EUR 8.2** per train-km for **national** transport (slight decline), and about **EUR 11** for **international** transport (increase due to higher parking costs). It should be noted that Infrabel did not adjust these tariffs in 2020 because SNCB received subsidies of more than 288 million to compensate for the effects of the Covid crisis. However, the other railway undertakings received a number of aid measures, such as the elimination of administrative costs.



Position of Belgium for charges

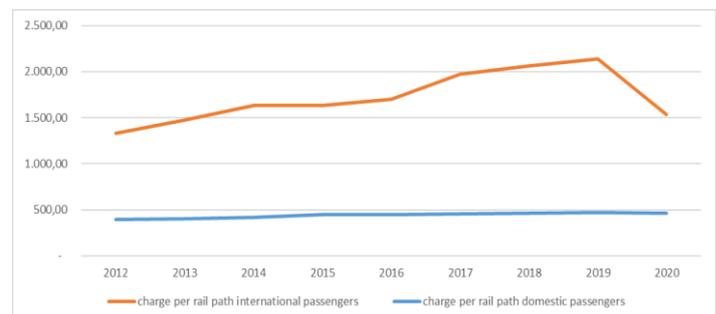
At **EUR 8.3 per train-km**, Belgium's level of charges is **higher than the European average** of **EUR 4.50** per train-kilometre.

In France, operators pay on average EUR 9.17, in the Netherlands EUR 2.12, and in Germany EUR 5.40. There is a wide disparity in the level of charges. This disparity can be explained by differences between networks in terms of subsidies, network characteristics, etc.



Turnover per train path

The turnover per train path **fell** sharply in 2020. It amounted to **EUR 455** in 2020, compared to EUR 673 in 2019. The turnover for the national passenger segment is EUR 472. For the international passenger segment, it amounts to EUR 1,536. This fall in turnover per train path was compensated for by subsidies.



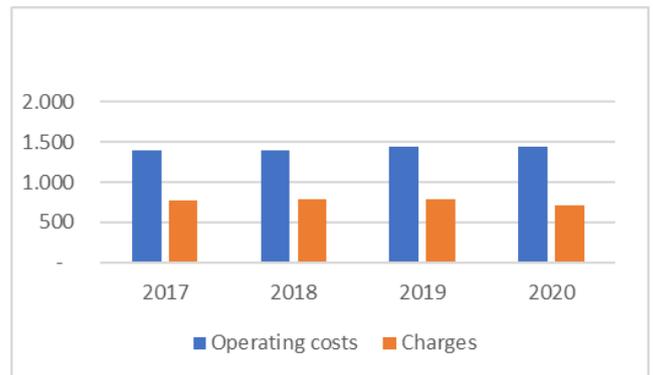
Charges account for 65% of Infrabel's turnover (compared to 69% in 2019), operating subsidies account for 16% (compared to 10% in 2019), and other types of revenues (energy, etc.) account for 19%. The fall in the share of charges can be explained by the Covid crisis and the resulting fall in turnover for Infrabel, which was compensated for by an increase in subsidies.

04 » TARIFFS FOR THE USE OF THE RAILWAY INFRASTRUCTURE

Operating costs vs. infrastructure charges

In 2020, charges accounted for **50% of the operating costs** (the costs of the undertaking excluding depreciation, downward value adjustments, financial costs). Passenger charges accounted for almost 96% of the amount of charges collected).

Operating subsidies account for 12.3% of the operating costs, which is a significant increase compared to previous years.



Investments of Infrabel

Infrabel invested EUR 894 million in 2020, of which EUR 591.4 million for safety and punctuality. The graph below shows the distribution of investments. This amount is comparable to 2019 but includes a significant change in the nature of investments. In 2019, the majority of investments (almost 60%) were allocated to capacity increases. In 2020, the majority of investments were allocated to improving punctuality and safety.

