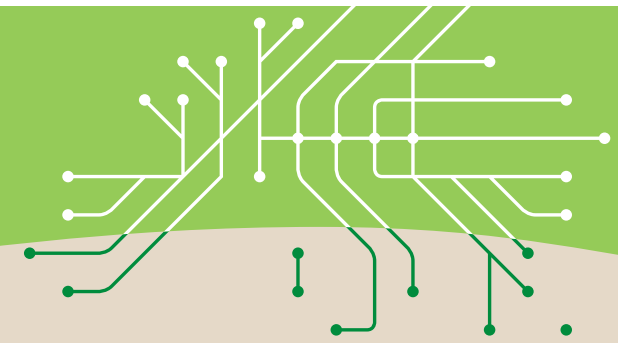




# RAIL

– a sustainable transport mode

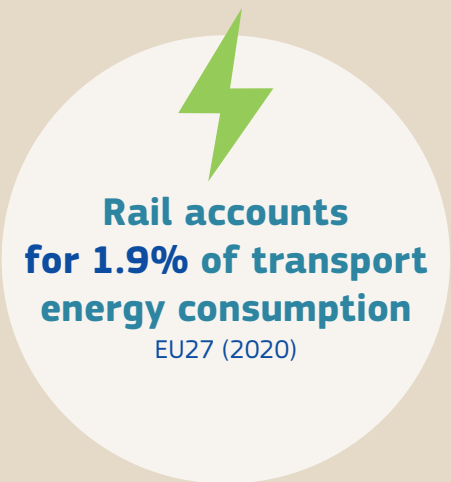
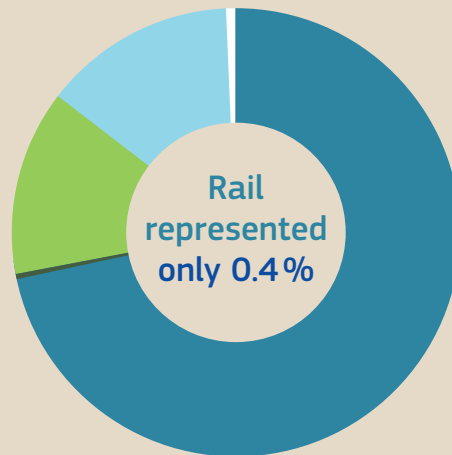


**A key contributor  
to the EU's 2050 climate neutrality goal**

### Greenhouse gas emissions by transport mode

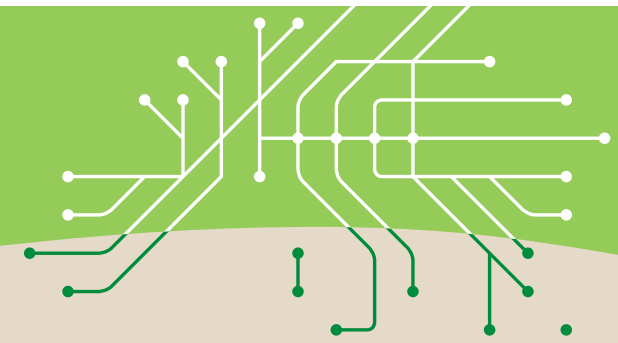
EU27 (2020)

- Rail
- Waterborne
- Air
- Road
- Other

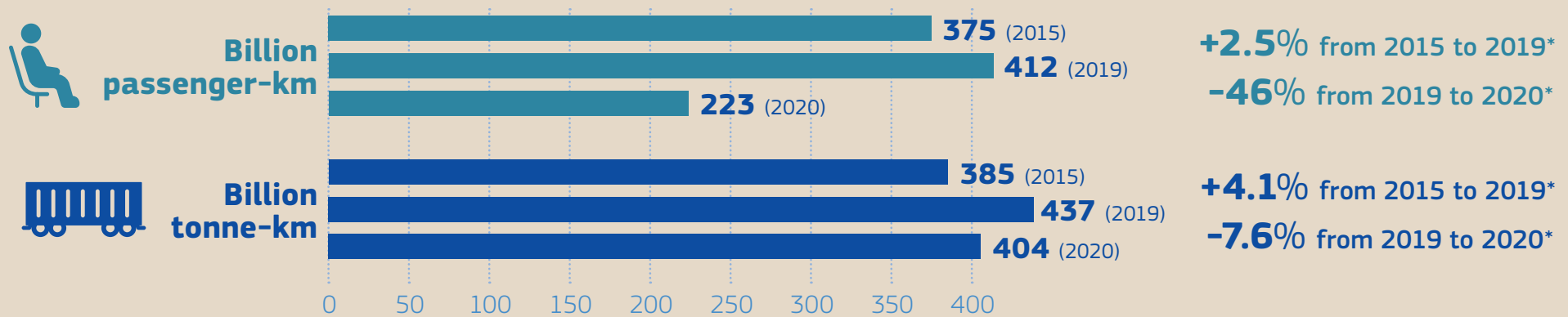




# COVID-19: effects on rail transport volumes



## Traffic development



## Proportion of traffic types crossing borders

EU27 (2020)

**3.6%**  
Passenger traffic

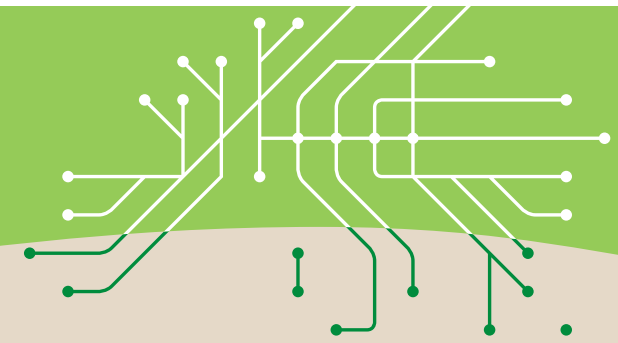


**53%**  
Freight traffic

\* Compound annual growth rate (CAGR)



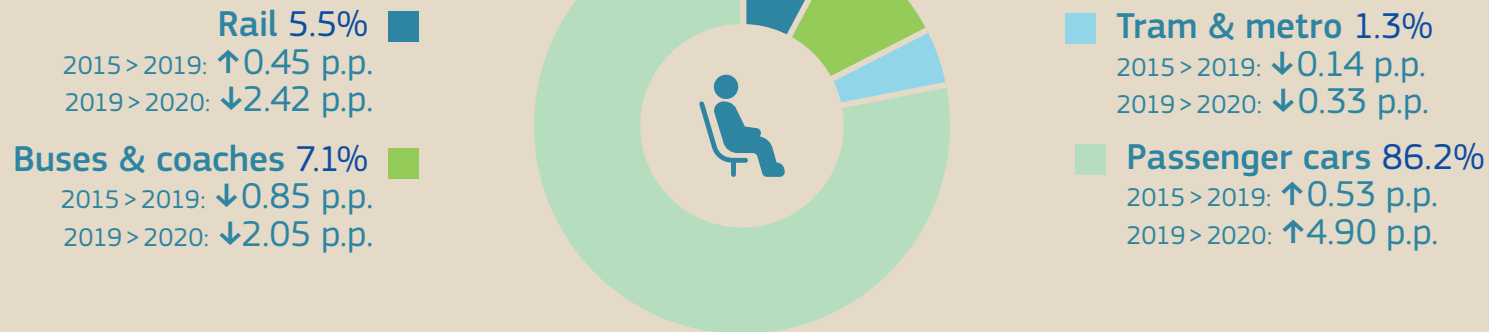
# PASSENGER RAIL: potential still underexploited



## Land modal share

EU27 (2020)

### Passenger transport



# 79%

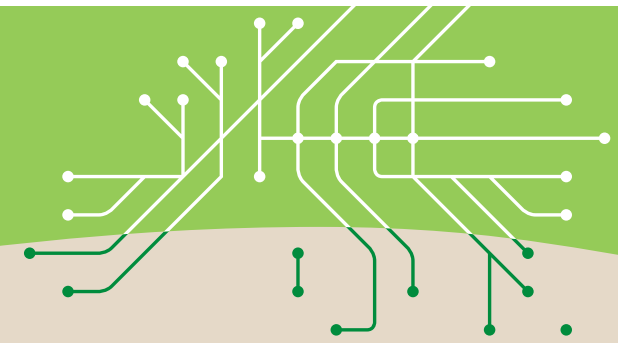
## of all train kilometres run are passenger services

EU27 (2020)





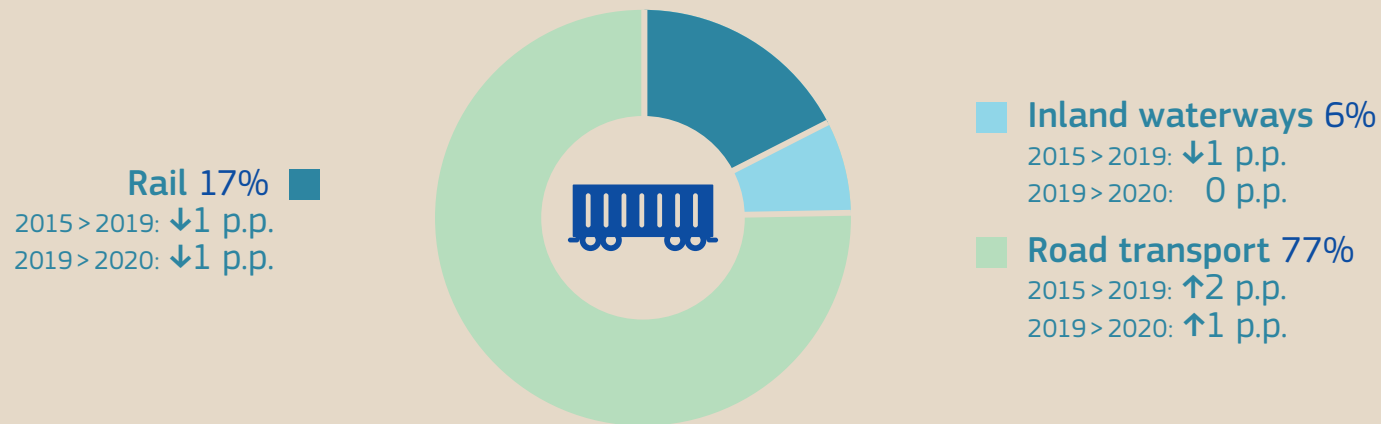
# RAIL FREIGHT: potential still underexploited



## Land modal share

EU27 (2020)

### Freight transport\*



# 21 %

## of all train kilometres run are freight services

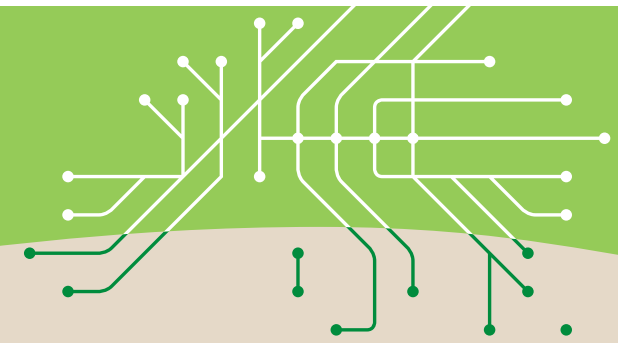
EU27 (2020)



\* excluding pipelines



# OFFERING OPTIONS to rail passengers



## Market share: alternative rail operators

EU27 (2020)

- Alternative operators
- Incumbents

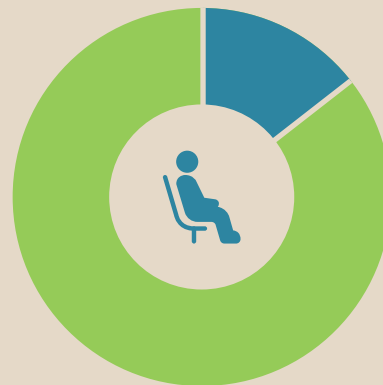
### National passenger markets

#### National commercial passenger markets



**6.6%**

-1.9% compared to 2015



**14.4%**

+2% compared to 2015

#### National PSO passenger markets



**18.5%**

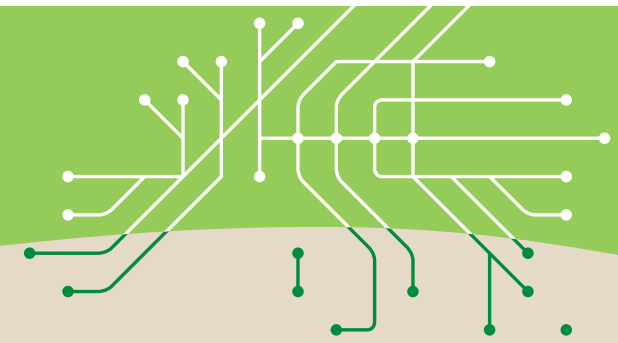
+1.9% compared to 2015

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

\*in passenger-km



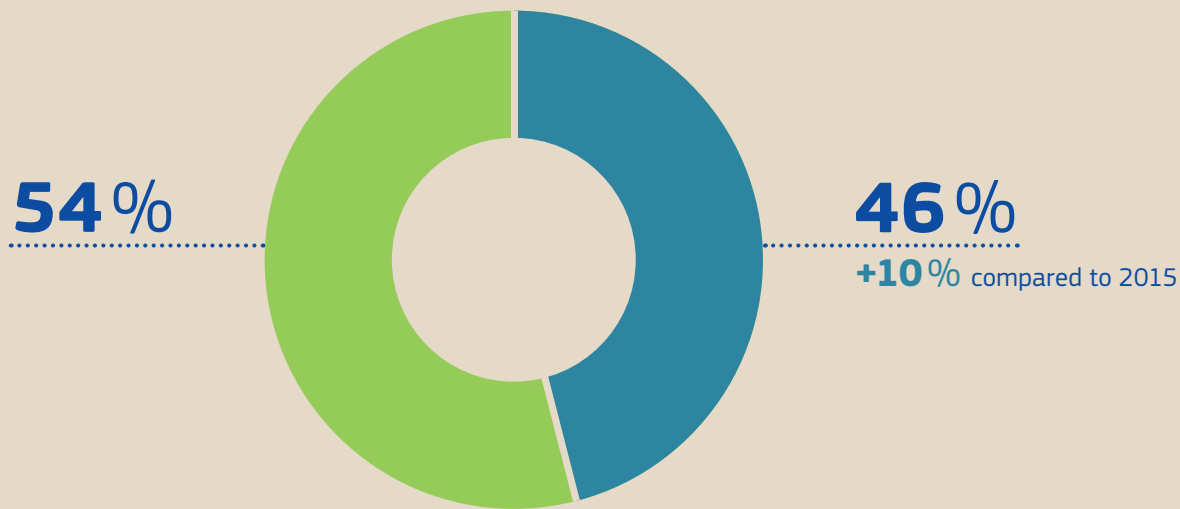
# A DYNAMIC FREIGHT MARKET and increasing congestion



## Freight market

EU27 (2020)

- Market share of alternative operators
- Market share of incumbents

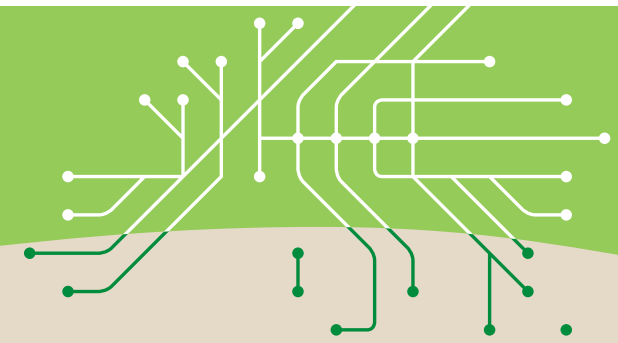


## A congested network

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



# CONNECTING people and businesses



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

Around

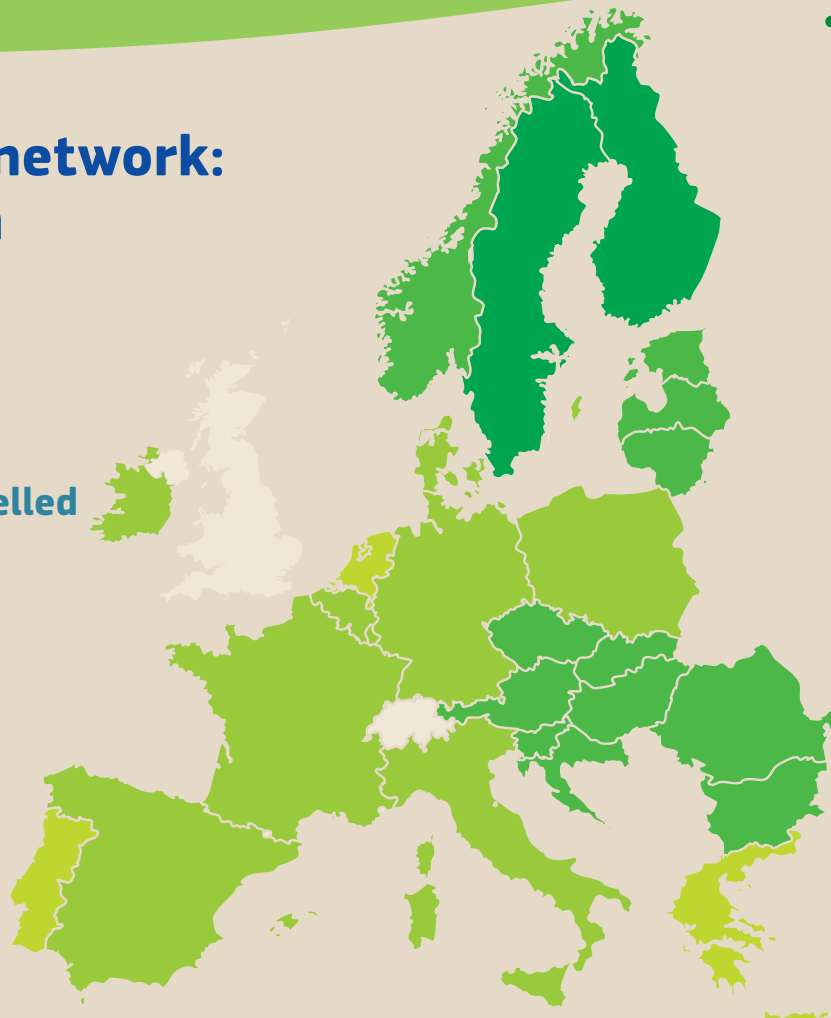
**81.6%**

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

**High-speed network** by the end of 2019

**11 526 km**

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



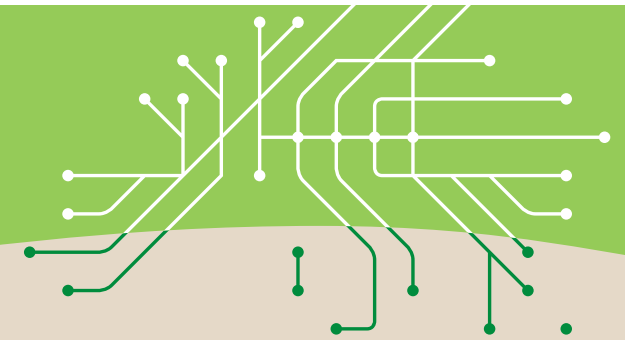
**Average distance  
between stations  
in the EU27 (2020)  
6.7 Km**

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

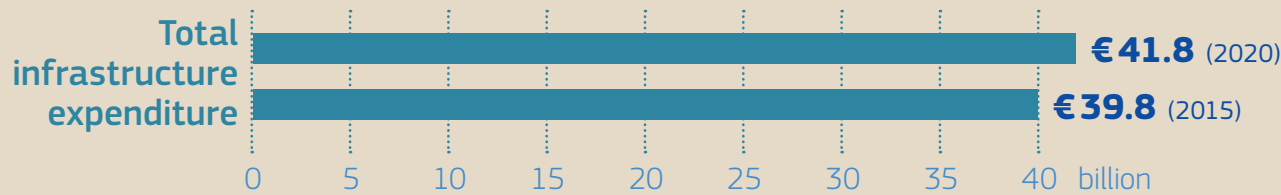
- Over 1 000 line-km
- 500 – 1 000 line-km
- 250 – 500 line-km
- Under 250 line-km



# PUBLIC FUNDING IS ESSENTIAL for infrastructure operation and investment

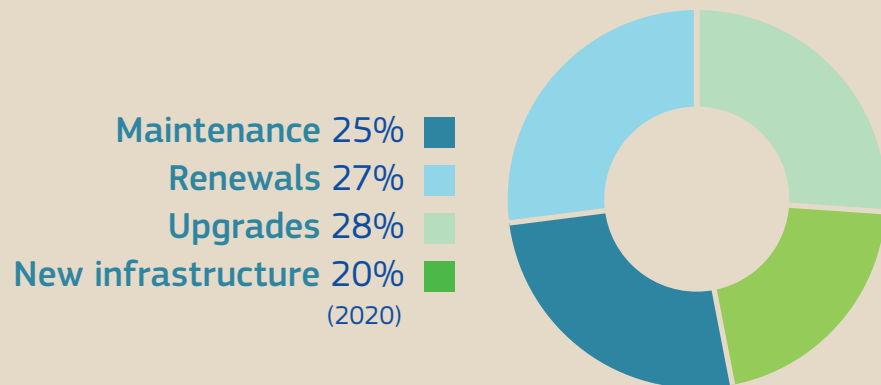
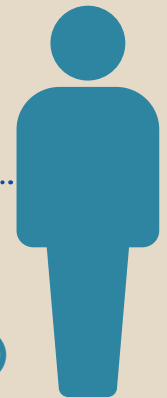


## Rail infrastructure expenditure EU27



€94

infrastructure expenditure per inhabitant in 2020 (EU27)

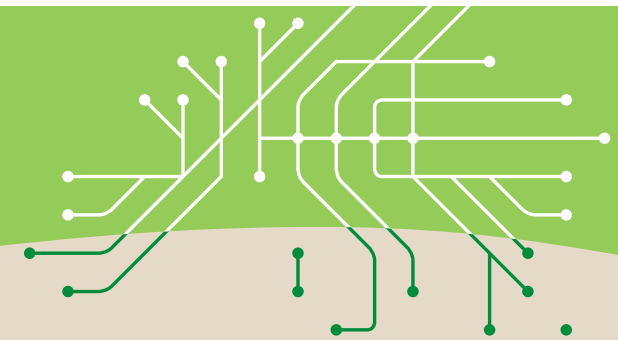


69% National budgets  
31% EU co-financing + other sources (2020)





# 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

