



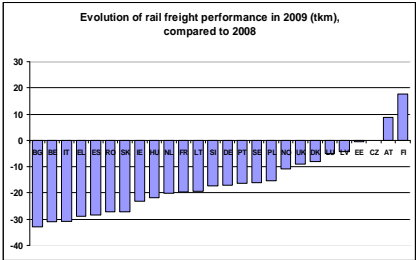
Rail Market Monitoring - the 2010 survey

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European Commission – DG Mobility and Transport
Rail Market Monitoring
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Freight transport

Evolution of rail freight performance in 2009 (tkm), compared to 2008

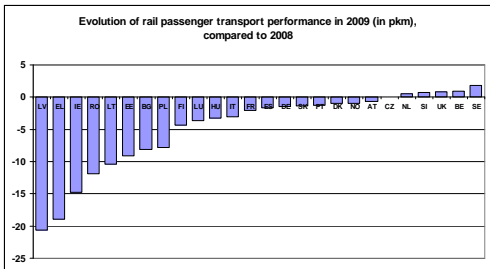


Country	Change (tkm)
BG	-35
BE	-25
FR	-20
EL	-15
NL	-10
RO	-10
SI	-10
SK	-10
IE	-10
HU	-10
NL	-10
PL	-10
PT	-10
SI	-10
SK	-10
SE	-10
PL	-10
NO	-10
DK	-10
LU	-10
LV	-10
EE	-10
CZ	-10
AT	-10
FI	15

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Passenger transport

Evolution of rail passenger transport performance in 2009 (in pkm), compared to 2008

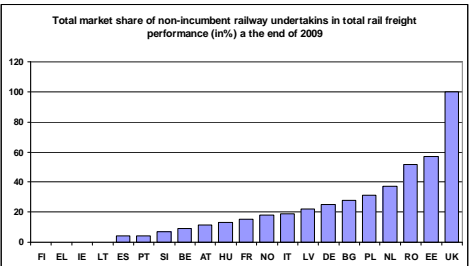


Country	Change (pkm)
LV	-20
EL	-15
IE	-10
RO	-10
LT	-10
BE	-10
BG	-10
PL	-10
FI	-10
LV	-10
HU	-10
IT	-10
ES	-10
LU	-10
UK	-10
AT	-10
CZ	-10
NL	-10
SI	-10
UK	-10
BE	-10
SE	-10

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Freight : Market share of non-incumbent companies (2)

Total market share of non-incumbent railway undertakings in total rail freight performance (in%) at the end of 2009

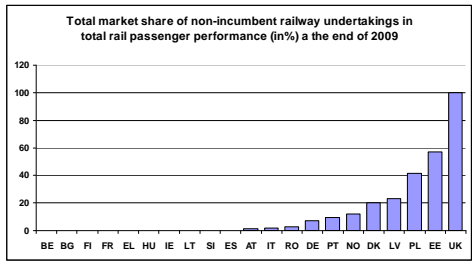


Country	Market Share (%)
FI	5
EL	5
IE	5
LT	5
ES	5
PT	5
SI	5
BE	5
AT	5
HU	5
FR	5
NO	5
IT	5
LV	5
DE	5
BG	5
PL	5
NL	5
RO	5
EE	5
UK	100

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Passenger: market share of non-incumbent companies (2)

Total market share of non-incumbent railway undertakings in total rail passenger performance (in%) at the end of 2009

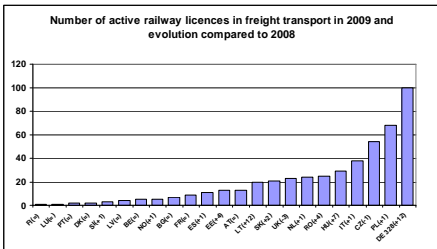


Country	Market Share (%)
BE	5
BG	5
FR	5
EL	5
HU	5
IE	5
LT	5
SI	5
ES	5
AT	5
IT	5
RO	5
DE	5
PT	5
NO	5
DK	5
LV	5
PL	5
EE	5
UK	100

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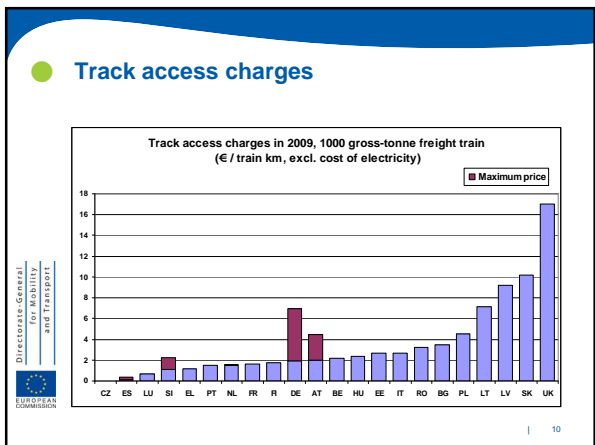
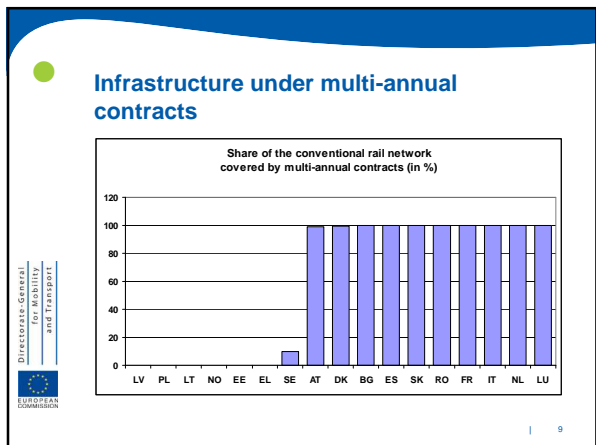
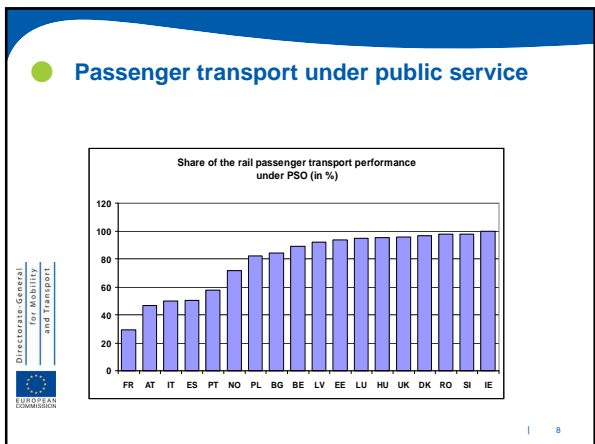
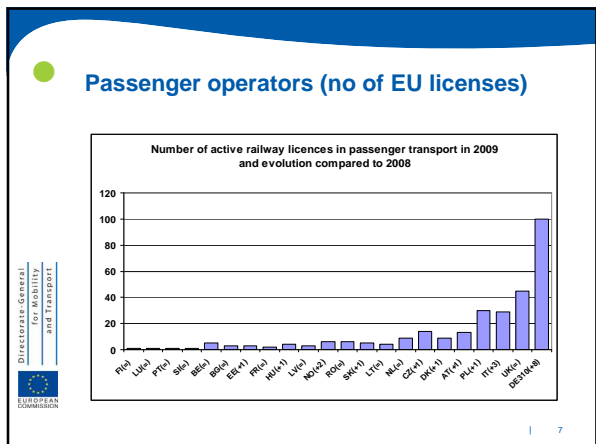
Freight operators (no of EU licenses)

Number of active railway licences in freight transport in 2009 and evolution compared to 2008



Country	Number of Licences
PL	5
UK	5
FR	5
BE	5
EL	5
IE	5
LT	5
ES	5
PT	5
SI	5
BE	5
AT	5
HU	5
FR	5
NO	5
IT	5
LV	5
DE	5
BG	5
PL	5
NL	5
RO	5
EE	5
UK	100

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- ### The results of the RMMS 2010 survey: conclusions
- Evolution of both freight and passenger traffic was negative in most Member States in 2009
 - The market share of non-incumbents companies rose significantly
 - The number of railway licences was rather stable
 - Significant disparities between Member States remain regarding track access charges

Thank you for your attention!