

Office of Rail Transport

<https://utk.gov.pl/en/new/16360,Competition-on-rail-tracks-in-Europe.html>
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Competition on rail tracks in Europe

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Only 9 out of 31 European countries, members of IRG-Rail, the Independent Regulators' Group – Rail, have ensured real competition on the tracks – reports the Office of Rail Transport in a recently published study "Competition in rail passenger transport on selected routes in Europe". Every 16th "competitive" train runs in Poland.

The study includes the results of two surveys – the first survey was conducted in Poland as part of work on the IRG-Rail 2018 Annual Report and the second one was IRG-Rail competition survey. The first survey covered all "competitive" connections in Poland and rail operators whose trains competed on various routes.

The IRG-Rail survey covered competitive situation in the rail passenger markets (including both PSO and non-PSO services). All participating countries were asked to provide data for the calculation of Herfindahl-Hirschman Indexes (HHIs) and on rail operators and their market shares. HHI is used to measure market concentration and can serve as an indication of the competition intensity in a given market. HHI is commonly used on a scale from one to 10 000, where 10 000 means that there is no competition in the market, i.e. there is a monopoly.

Among 25 countries participating in IRG-Rail survey only for the United Kingdom HHI was 676 what indicates a competitive market. Sweden was second with 2,224 points. Poland came third with 2,328 points. It means that the rail market in Poland is moderately concentrated. The remaining IRG-Rail member countries which participated in the survey were above 2,500 HHI points what stands for highly concentrated markets. Moreover, 10 of them have de facto rail monopolies.

- In the single European market a rail passenger has alternatives when choosing an operator on a selected route only in a few countries. Most markets are still monopolies with incumbent state operators – comments Ignacy Góra, the President of the Office of Rail Transport.

22 decisions granting open access and 4 decisions amending conditions of open access were issued in Poland between January 2018 and September 2020. According to the recently

published UTK's study, Poland is 5th when we consider the number of trains launched by the independent rail operators.

The UTK's study shows general indicators on competitive situation in the EU rail passenger market, as well as details for several EU countries where there is a real competition in the rail passenger transport. It also presents basic data on EU railway markets (the length and density of rail network, the number of operators competing on the routes selected for the study, the network usage intensity).

The IRG-Rail is a network of the independent rail Regulatory Bodies from 31 European countries, including Austria, Belgium, Bulgaria, Croatia, Czech Republic, Denmark, Estonia, Finland, France, the former Yugoslav Republic of Macedonia, Germany, Greece, Hungary, Ireland, Italy, Kosovo, Latvia, Lithuania, Luxembourg, the Netherlands, Norway, Poland, Portugal, Romania, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland and the United Kingdom. The overall aim of the organisation is to facilitate the creation of a single, competitive, efficient and sustainable internal railways market in Europe. The IRG-Rail acts as a platform for cooperation, information exchange and sharing of best practice between national railway regulators in order to face current and future regulatory challenges in railways and to promote a consistent application of the European regulatory framework.

[The study \(in Polish\) may be found here.](#)