

IMPACT ASSESSMENT OF THE LIBERALIZATION IN THE FREIGHT RAILWAY MARKET IN SPAIN

A view by
Juan Miguel Sánchez García
President of Railway Regulator Committee

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Analysis of the impact of liberalization in the rail freight transport market in Spain.(1)

Liberalization was established between 2003-2006: we have a six years experience in this new market (2006-2011).

How is the picture of the rail market in Spain?

- traffic figures on rail freight market show a drastic drop in the last eight years.
- the demand behaviour decreased drastically from 10% in 2000 to 2.5% in 2010 (in the market transport share in ton-km)

Analysis of the impact of liberalization in the rail freight transport market in Spain.(2)

Rail undertakings:

- 15 with licence.
 - 10 of them with safety certificate.
 - 7 with commercial activity.

Structure of the stockholder of the companies:

- 3 of them are Spanish public capital.
- 1 of them belongs to a major multinational of German public capital.
- 7 of them are part of builder companies, suppliers of IM.
- 1 is part of a multinational private company of passenger services.

Analysis of the impact of liberalization in the rail freight transport market in Spain.(3)

The current situation is due to several causes and deficiencies:

- Political target: HST
- Deficiencies about the rail policy:
 - The lack of a political strategy in Spain in rail freight activity from 2003 to 2010
- Problem in the design of the rail system:
 - From my point of view, a lack of courage to create the new rail system.
 - A improper design of the essential elements of the system: RB, finance, training, maintenance, service facilities, etc.

Analysis of the impact of liberalization in the rail freight transport market in Spain.(4)

- Deficiencies about the activity of Renfe Operadora:
 - The lack of a commercial strategy of the Renfe Operadora (public company)
 - A quality decreasing in the service. Difficulties to compete with the road transport in price and flexibility.
- Deficiencies about the Infrastructure Manager (ADIF)
 - A lack of accurate investment in the Iberian gauge network for years.
 - It's necessary to change the old manners: more empathy and understanding the client needs.
- Deficiencies about the Relationship between ADIF and Renfe Operadora
 - In many ways, their relationship shows signs of lack of coordination
- Deficiencies about the private railway companies: they want to make business but they don't want to bother the incumbent and the IM.

Analysis of the impact of liberalization in the rail freight transport market in Spain.(y 5)

- The fostering of the rail freight sector in Spain; the strategic plan to boost the rail freight market and the recent statement of the Minister of Fomento in the Parliament.
- News about a new regulatory body in Spain: current regulators will constitute the National Commission of Markets and Competition.
- The role of the Railway Regulator Committee: files about rail charges, terminals and services related with the railway.

THANK YOU FOR
YOUR ATTENTION!!!