

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

A view by  
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12 de marzo de 2012  
Jornada de FEDEA

# 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!!!