



4th Railway Packag Impact Assessment Questionnai

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Transport Ministries

Q1	Could you please summarise the current organisational structure of the railway sector in your
	country, including degree of vertical separation/integration, number of passenger operators,
	open access operations, public service contracts competitively awarded etc.

	All Other fall Coach Metro/Fram/Bus	Car	N/A
	competing modes? Air Other rail Coach Metro/Tram/Bus	Car	N/A
3	For each of the passenger service categories underneath, what do you conside	r to be t	he m
	Please specify other services:		
	International single wagonload freight		
	International trainload freight		
	National single wagonload freight		
	National trainload freight		
	What type of rail freight services are operated in your country? Tick all that apply		
	Please specify other services:		
	Urban/Suburban/Regional services (without public service obligations)		
	Other medium/long distance services (without public service obligations) Urban/Suburban/Regional services (with public service obligations)		
	High speed services (without public service obligations) Other medium/long distance services (with public service obligations)		
	High speed services (with public service obligations)		
	What type of rail passenger services are operated within your Member State?	ck all that	apply
	awarded to NS, National railway company. NS is paying an annual price for the public service contract / concession		

	Air	Other rail	Coacn	Metro/Tram/Bus	Car	N/A
High speed services (with public service obligations)	<i>C</i>	(~	0	(•	-
High speed services (without public service obligations)	C	~	C	C	0	(
Other medium/long distance services (with public service obligations)	0	(C.	C	•	C
Other medium/long distance services (without public service obligations)	C	~	C	(C	-
Urban/Suburban/Regional services (with public service obligations)	~	~	<i>C</i>	C	•	C
Urban/Suburban/Regional services (without public service obligations)	((<i>C</i>	_	-	(
Other: high speed services to Pa	ð	C	~	C	0	€

Q4 For each of the freight sectors underneath, what do you consider to be the main competing modes?

Nat Inte Inte	tional trainload freight tional single wagonload freight ernational trainload freight ernational single wagonload freight er-modal freight her: Maritime (short sea) and	ght		ſ			
Inte Inte	ernational trainload freight ernational single wagonload freig er-modal freight	ght					
Inte	ernational single wagonload freig er-modal freight	yht		(<i>(</i>	pm pm	otra
Inte	er-modal freight	pht				,	(
				•	•	c c	~
Oth	Maritima (short see) and			•	· ^	\sim	1
	ner jiviantime (Short Sea) and	Ī		l	· ·	r r	C
	lave any of these markets b nrough open access compe				mestic passe	nger rail serv	ices
			Total	Partial	In the process	No	N/A
Hig	gh speed services		\sim	("	\$ ***!	•	~
Oth	her medium/long distance service	es	(~	(**	•	C
Urb	ban/Suburban/Regional services		\sim	(~	•	C
Oth	her:	7	<u></u>	\mathcal{C}	((-
Hìg	gh speed services		C	Partial	In the process	No C	C
				Partial	In the process		N/A
	her medium/long distance service	es.	_	C	Ċ		C
	ban/Suburban/Regional services		~	e	(**	C	C
	her:	-	C	~	~	C	_
	Where services have been op een in increasing rail deman		gh open a				
Hia	gh speed services	rery positive	C	r Neutrai	Negative	Very negative	No Opinior
Oth	her medium/long distance	~	~	r	C	(°	(
Urb	pan/Suburban/Regional vices	C	(C	~	C	~
	ease specify other vices:	C	~	(~	C	C	r

Q7.1 In your opinion what would be the most important contributing factors for the success of market opening through open access operations?

services

Please specify other services:

NL has reservations regarding open access oper	rations in 🛕
case this could reduce the use of existing sca	rce
capacity. Also the issue of cherry-picking has	s to be
dealt with and the amounts for the State will	be

Q7.2 In your opinion what would be the most important contributing factors for the success of market opening through competitive tendering of public service contracts?

Equal	conditions	for all	l players,	organise l	evel	playing	
field	regarding .	access t	o rolling	stock and	opera	tional	
staff	, stations,	passen	ger inform	ation servi	ces a	ınd	-
ticke	ting.The PS	0-contra	act is als	o important			~

In your country, have there been any complaints or concerns raised by new entrant or incumbent railway undertakings or other parties on the following issues in relation to market opening?

	Yes	No	No Opinion
Access to infrastructure	~	0	(
Access to rail related services	0	~	C
Access to rolling stock	(•	~
Regulatory oversight	~	~	*
Other:	C	("	<i>C</i>

Where you have responded "yes", please provide further details, including specific evidence. Also, where relevant, please indicate whether changes have been made to the legal/regulatory framework as a result of the complaints/concerns made.

-	Rail related services: national ticketsystem gives	4
1	problems by traveling from the main to the local	
i	railwayundertakings. Throughticketing is garantueed but	
1	additional charges in case of changing operators is an	•

If no market opening through open access competition has been achieved to date, what is the expectation of market opening of domestic passenger services through open access competition occurring in the next few (5) years in the absence of new EU requirements in the following markets?

	Very Likely	Likely	Unlikely	Very unlikely	No opinion	N/A
High speed	~	(6	•	((
Other medium/long distance services	C	(6	ø	C	~
Urban/Suburban/Regional services	C	(~	9	0	<i>C</i>
Other:	C	_	(C	C	<i>C</i>

Q9.2 If no market opening through competitive tendering of public service contracts has been achieved to date, what is the expectation of market opening of domestic passenger services through competitive tendering of public service contracts occurring in the next few (5) years in the absence of new EU requirements in the following markets?

	Very Likely	Likely	Unlikely	Very unlikely	No opinion	N/A
High speed	(C	(0	~	(
Other medium/long distance services	C	6	C	•	~	C
Urban/Suburban/Regional services	C	•	C	_	C	~
Other:	***	<i>**</i>	4c ,	¿^~	6	¿~-

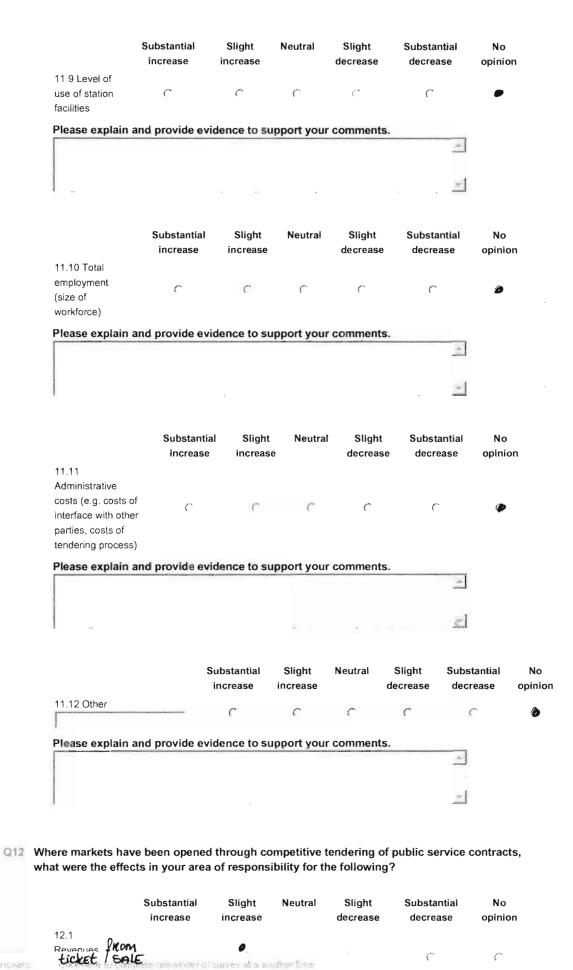
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Q10.1	If markets have be applies?	een opened, ple	ase explain	how ticket	ing is organi	sed. Which of th	ne followir
						Yes	No
	Internet only tickets for	r specific operator				Ô	~
	Bilateral arrangements	on ticketing between	en operators			•	C:
	Through-ticketing for the	he whole sector				•	(
	Inter-availability of tick	ets between opera	tors for the wh	ole sector		P	(
	Other:					((
210.2	If further ticketing	integration was	required, h	ow should	this integrat	tion be achieved	1?
	Voluntary agreements					Yes	No
	Compulsory regulatory		har Stata lava	.ı		0	C
	Compulsory regulatory			:1		<i>-</i>	•
2 1.							•
Q11	Where markets ha your area of response			en access	competition	, what were the	effects in
		Substantial	Slight	Neutral	Slight	Substantial	No
		increase	increase		decrease	decrease	opinion
	11.1						
	Revenues from ticket sales	C	C		((•
	, .	cional new op	ven decess	Service	o die in .		
		Substantial increase	Slight increase	Neutral	Slight decrease	Substantial decrease	No opinion
	11.2 Operational efficiency	C	<i>(</i> ~	C	C.	(٠
	Please explain	and provide ev	idence to su	pport you	r comments.	The second secon	
	.1						
		Substantial increase	Slight increase	Neutral	Slight decrease	Substantial decrease	No opinion
	11.3 Private investment in the railways	C	<i>~</i>	C	C	C	•
	Please explain	and provide ev	idence to su	pport you	r comments.		
		Substantial		Neutral	Slight rease	Substantial decrease	No opinion

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11.4 Need of public funds for infrastructure	C	~	((**	~	0
investment						
Please explain	and provide evid	dence to su	pport your	comments.	2	
					V	
	Substantial increase	Slight increase	Neutral	Slight decrease	Substantial decrease	No opinio
11.5 Need of						
public funds for public service contracts compensation	C	C	(~	C	(*^	•
•	and provide evid	dence to su	pport your	comments.		
		100000000000000000000000000000000000000	4			
,					·9	
	Substantial increase	Slight increase	Neutral	Slight decrease	Substantial decrease	No opinio
4.4.0	increase					
11.6 Infrastructure		•	<i>p</i> ~			_
Infrastructure maintenance and	(C	C	(C		σ
Infrastructure maintenance and renewal costs	C	C	<u></u>	(6	ſ	σ
Infrastructure maintenance and renewal costs		dence to su	C pport your	comments.		ø
Infrastructure maintenance and renewal costs	C	dence to su	pport your	comments.	۲	Ø
Infrastructure maintenance and renewal costs	C	dence to su	C pport your	comments.		đ
Infrastructure maintenance and renewal costs	C	dence to su	pport your	comments.	-	σ
Infrastructure maintenance and renewal costs	C	dence to su	pport your	comments.	Substantial	Ø
Infrastructure maintenance and renewal costs	and provide evide				Substantial decrease	No
Infrastructure maintenance and renewal costs Please explain	and provide evid Substantial increase	Slight increase		Slight		No
Infrastructure maintenance and renewal costs Please explain	and provide evide	Slight		Slight		No
Infrastructure maintenance and renewal costs Please explain 11.7 Level of track access charges	and provide evid Substantial increase	Slight increase	Neutral	Slight decrease		No
Infrastructure maintenance and renewal costs Please explain 11.7 Level of track access charges	and provide evid	Slight increase	Neutral	Slight decrease		No
Infrastructure maintenance and renewal costs Please explain 11.7 Level of track access charges	and provide evid	Slight increase	Neutral	Slight decrease		No
Infrastructure maintenance and renewal costs Please explain 11.7 Level of track access charges	and provide evid	Slight increase	Neutral	Slight decrease		No
Infrastructure maintenance and renewal costs Please explain 11.7 Level of track access charges	and provide evid Substantial increase	Slight increase	Neutral	Slight decrease		No
Infrastructure maintenance and renewal costs Please explain 11.7 Level of track access charges	and provide evid Substantial increase and provide evid	Slight increase C dence to su	Neutral	Slight decrease comments.	decrease	No opinio
Infrastructure maintenance and renewal costs Please explain 11.7 Level of track access charges Please explain	and provide evid Substantial increase	Slight increase C dence to su	Neutral	Slight decrease	decrease	No opinio
Infrastructure maintenance and renewal costs Please explain 11.7 Level of track access charges	and provide evid Substantial increase Substantial increase	Slight increase dence to su Slight increase	Neutral pport your	Slight decrease Comments. Slight decrease	Substantial	No opinio
Infrastructure maintenance and renewal costs Please explain 11.7 Level of track access charges Please explain 11.8 Level of use of nfrastructure	and provide evid Substantial increase and provide evid	Slight increase C dence to su	Neutral	Slight decrease comments.	decrease	No opinio
Infrastructure maintenance and renewal costs Please explain 11.7 Level of track access charges Please explain 11.8 Level of use of infrastructure capacity	and provide evid Substantial increase Substantial increase	Slight increase dence to su Slight increase	Neutral Poport your	Slight decrease Comments.	Substantial	No opinio
Infrastructure maintenance and renewal costs Please explain 11.7 Level of track access charges Please explain 11.8 Level of use of infrastructure capacity	and provide evid Substantial increase Substantial increase	Slight increase dence to su Slight increase	Neutral Poport your	Slight decrease Comments.	Substantial	No opinio



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Please explain and provide evidence to support your comments.

		estantial crease	Slight increase	Neutral	Slight decrease	Substantial decrease
12.2 Operational		\subset	•	~	\mathcal{C}	C
efficiency			daa. & a			
-	-	AND	dence to su ational e	and the same of th	y reflects	lower _
1	ng costs, changed.		operation	al quali	ty aspects	may
						~
	6	hotontial	Climba	Noutral	Climba	Substantial
		bstantial icrease	Slight increase	Neutral	Slight decrease	Substantial decrease
12.3 Private	:					
investment into the railways		(•	(C	C
		moude out	danaa 4= a			
	ctured da	AAAA	lable reg		mpact on	A
						-1
1						-
		Substantial	Slight	Neutral	Slight	Substantial
12.4 Need o		increase	increase		decrease	decrease
public funds		~	4		~	_
infrastructur investment	e	<i>C</i>		C	6	C
Dianas ave	olain and p	rovide evi	dence to su	pport your	comments.	
riease exp	And the spirit of the second s	, not be		, someti	ain railwa mes show a	in
Railway network increasi	which ha ing use c	of passer	ngers or		ture (more	
Railway network increasi	which ha ing use c ty wants	of passer	ngers or ge the in			
Railway network increasi authorit	which ha ing use o ty wants	of passer to chan	ngers or ge the in	frastruc Neutral	ture (more	•
Railway network increasi authorit	which had ing use of the wants	of passer to chand	ngers or ge the in	frastruc Neutral	ture (more	Substantial
Railway network increasi authorit	which had ing use of wants	of passer to chand	ngers or ge the in	frastruc Neutral	ture (more	Substantial
Railway network increasi authorit 12.5 Need o public funds public servic contracts	which had ing use of specific for see	of passer to chand Substantial increase	ngers or ge the in Slight increase	frastruc Neutral	ture (more	Substantial
Railway network increasi authorit	which had ing use of specific for see	of passer to chand Substantial increase	ngers or ge the in Slight increase	frastruc Neutral	ture (more	Substantial
Railway network increasi authorit 12.5 Need o public funds public servic contracts compensation	which had ing use of wants of force on blain and po	of passer to chance Substantial increase	ngers or ge the in Slight increase	Neutral	Slight decrease	Substantial decrease
Railway network increasi authorit 12.5 Need o public funds public servic contracts compensation Please exp The prov the region devel	which had ing use of years wants of force on blain and provinces had conal rail topment of the comment of the	Substantial increase rovide evice verecessist service public	Slight increase dence to sure ived a bucker, there is expendit	Neutral Pport your dget for are no	Slight decrease	Substantial decrease
Railway network increasi authorit 12.5 Need o public funds public servic contracts compensation Please exp The prov the region devel	which had ing use of years wants of force on blain and provinces had ional rail topment of ent and s	Substantial increase rovide evicave receil service of public service of	Slight increase dence to sure ived a burces, there is expendition the pro-	Neutral pport your dget for e are no	Slight decrease comments. the tende structure mational. NS doesn	Substantial decrease
Railway network increasi authorit 12.5 Need of public funds public servic contracts compensation Please exp The provide region devel government	which had ing use of years wants of for the complain and provinces had in and sent	Substantial increase rovide evicate receipt service of public ser	Slight increase dence to sure ived a bucker, there is expendit	Neutral Pport your dget for are no	Slight decrease comments. the tende structure national	Substantial decrease

maintenance and renewal costs Please explain and provide evidence to support your comments. Due to higher use of the infrastructure. Substantial Slight Neutral Slight Substantial No increase increase decrease decrease opinion 12.7 Level of track access charges Please explain and provide evidence to support your comments. Substantial Slight Neutral Slight Substantial No increase increase decrease decrease opinion 12.8 Level of use of infrastructure capacity Please explain and provide evidence to support your comments. Substantial Slight Neutral Slight Substantial No increase increase decrease decrease opinion 12.9 Level of use of station facilities Please explain and provide evidence to support your comments. Substantial Slight Slight Substantial No Neutral opinion increase increase decrease decrease 12.10 Total employment (size of workforce) Please explain and provide evidence to support your comments. Some railway companies with an tendered contract doesn't have conductors on the train.

Substantial

Slight

Neutral

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	12.11							
	Administrative							
	costs (e.g. costs of	~	~	0		((
	interface with other		,			,		,
	parties, costs of							
	tendering process)							
	Please explain and provi	ide evidence to s	upport you	r commen	ts.			
	Administrative cosundertakings for maprocedures.				tende	ring	2	
	1							
		Substantial increase	Slight increase	Neutral	Sligh		Substan decreas	
	12.12 Other							
		- (~	(C		C	0
	Please explain and prov	ide evidence to s	upport you	r commen	ts.	****		
							7/2	
	Increase Decrease	e**		lo opinion				
Pleas	se explain and provide eviden	nce to support your c	hoice.					
						etc.		
						+		
. 1.								
	you believe that there wi rkers (e.g. remuneration							
<u>^</u>	Improvement C Wors	sening C No	change	No opi	inion			
Pleas	se explain and provide eviden	ice to support your c	hoice.					
				A STATE OF THE STA		-		
20000								
co o						4		
Marie Park						4		
	what ways do you think th dressed? Please tick as n		, ,	stock for	new ope	erators	shoul	d be
					Yes P	ossibly		No opinion
Full a	access to all technical informa	ation (infrastructure c	haracteristics	6				
	rmining the rolling stock speci structure manager and incuml		ed by the		•	-	C	£
	matic transfer of rolling stock		another at th	ne start of				
	w public service contract.	nom one operator to	anound act	io start UI	C		(C
Intro	duce measures so that rolling	stock is owned by C	Competent Au	uthorities				
and o	operators bid to use it as part ess.	of the public service	contract tend	dering	(···	٠	0	(**
	duce measures so that rolling	stock is owned by the	nird parties (F	Rollina	,,,,			
				3	<u></u>	•		(

Please comment In cases of competitive tendering the Member State (or the Member States in cases of international PSO contracts) has to ensure a level playing field between operators regarding access to rolling stock. This can be Public service contracts We discuss in this section specific Issues regarding public service contracts Do you procure public service obligation financed services? Yes No If you are also a Competent Authority that procures public service obligation financed services pled to not answer questions 16 to 19 below since these are covered in the Public Transport Authority section of the survey Should Public Transport Authorities be subject to defined compliance criteria developed legislation when defining the public service obligations? Yes No No opinion Please indicate why To avoid market foreclosure through excessively broadly defined public service obligation would you agree that existing EU rules should be made more precise on the following iss Yes No No Opinion Necessity and proportionality to meet public mobility policy objectives The scope of the contract (i.e. volume, geographical coverage) The impact on the public sector funding Improving the quality of the train service Other:		(6 6
In cases of competitive tendering the Member State (or the Member States in cases of international PSO contracts) has to ensure a level playing field between operators regarding access to rolling stock. This can be Public service contracts We discuss in this section specific Issues regarding public service contracts Do you procure public service obligation financed services? Yes No If you are also a Competent Authority that procures public service obligation financed services ple do not answer questions 16 to 19 below since these are covered in the Public Transport Authority section of the survey Should Public Transport Authorities be subject to defined compliance criteria developed legislation when defining the public service obligations? Yes No No opinion Please indicate why To avoid market foreclosure through excessively broadly defined public service obligation would you agree that existing EU rules should be made more precise on the following iss would you agree that existing EU rules should be made more precise on the following iss The scope of the contract (i.e. volume, geographical coverage) The impact on the public sector funding Improving the quality of the train service Other: Should the relevant stakeholders be consulted on the above mentioned criteria before the enacted? Yes No No opinion Please indicate why. If "yes", please indicate how and which relevant stakeholders should				
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Q17.1 Do you consider that the general principle for awarding public service contracts in rail should be compulsory competitive tendering as in other land transport sectors? Yes O No. •

Flock faces to complete remainder of curvey at a anather time

letter has been sent to NL Parliament 4th April 2012 to	
clarify the NL position on tendering. I.a. it is stated that for the main railway network member state should be	
ree to decide about competitive tendering of rail	.≛
If competitive tendering of public service contracts were made compulsor including a transitory period to allow for the gradual letting of all public se order not to limit competition?	
• Yes C No C No opinion	
Please comment.	
A transitional period to respect existing and already awarded PSO contracts starting in the near future in line with 1370/2007/EC should be ensured. Also NL has positive experience with gradual introduction of tendering	annihina 2
Do you consider that there are other reasons for directly awarding public temporary basis?	service co
C Yes C No ● No opinion	
Please provide examples.	
A Company of the Comp	-
	-1
when a competitive tender is awarded to a new party?	
In the Netherlands the essential staff (not belong tot the overhead) of the railway undertaking is protected by national law. The staff dealing with the operation of transport keeps their job on the new party. Should there be further EU harmonisation of the procedure for awarding and the staff of	oublic sen
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Data Collection

In addition to data and evidence you may have already supplied in answer to previous questions do you have additional data in the following areas which you are able to provide? We would emphasise that any data that supports your

data supporting your views. All data will be treated in complete commercial confidence unless permission is specifically given.

Q21 Current market data

Do you have any data in the following areas in your country which you could share for the purposes of the study?

	Yes	No
Passenger demand and revenue	•	1
Data on subsidy payments to the railway	•	("
Data on costs of Railway Undertakings	(•
Data on the staffing composition of Railway Undertakings	(•
Investment in the railways (particularly rolling stock)	5	ð
Quality of current services (e.g. customer satisfaction surveys)	0	(

Do you have any of the data above disaggregated by type of service e.g. high speed, long-distance, regional, urban?

Enclosed are the	following documents,	regarding the main
railway lines (H	(RN), excluded are the	decentraliesed/
regional lines.	All the main data are	availeable by the
annual reports o	f railcompanies.	

Q22 Data on the impacts of market opening

Do you have data (including studies you have carried out) on the impacts of market opening and new entrants in your country? In particular, do you have data/information on:

	Yes	No
Impact of market opening on new entrant levels - what effect has it had on the proportion of new entrants over time?	•	\cap
Impact on demand	9	(
Impact on service levels (impact on frequency, speed, destinations served)	•	~
Impact on modal share of railways	(•
Costs of new entrants relative to incumbents	(ð
Staffing levels of new entrants relative to incumbents	•	(
Pricing strategy of new entrants	~	•
Response of incumbent to liberalisation - reduced costs and fare levels? Improved service?		\sim
Impact on public funding of public services	-	Û
Impact on quality of services (reliability, cleanliness of trains, information provision, security, booking experience etc)	C	3

Please send all information (documents, data, links) to kevin.dadswell2@sdgworld.net

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