TRAIN ACCESS CHARGES AND LIBERALIZATION OF RAILWAY FREIGHT MARKET

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WHO WE ARE?

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- Head of Chair for Railway Transport Management
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- Head of Railway Services Sector in Croatian Regulatory Authority for Network Industries (HAKOM)
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LEGAL BASIS

Directive and *Regulation* of EU

- First railway package
- Second railway package
- Third railway package
- Fourth railway package (market and technical pillar) ☺

LEGISLATIVE - EU

- Directive 2012/34
- Directive 2016/2370
  - Regulation 1370/2007
  - Regulation 2016/2338
  - Commission Delegated Decision (EU) 2017/2075
  - Regulation 1371/2007
  - Commission Implementing Regulation 2017/2177
  - **Commission Implementing Regulation (EU) 2015/909**

LEGISLATIVE - HR

- Railway Act (OG 32/19 and 20/21)
- Act on the Regulation of Rail Services Market and the Protection of the Passenger Rights in Rail Transport (OG 104/17)

NETWORK STATEMENT (1)

- In accordance with EU Directive 2012/34/EU on the allocation of infrastructure capacity, the levying of fees and charges for use of the infrastructure, as well as the Railway Act (NATIONAL) Infrastructure Manager issue Network Statement.
- The purpose of the Network Statement is to provide all stakeholders intending to apply for infrastructure capacity or operate rail services on the railway network with basic information on the prerequisites for this, with an emphasis on that part of the railway network which is administered by Infrastructure Manager.

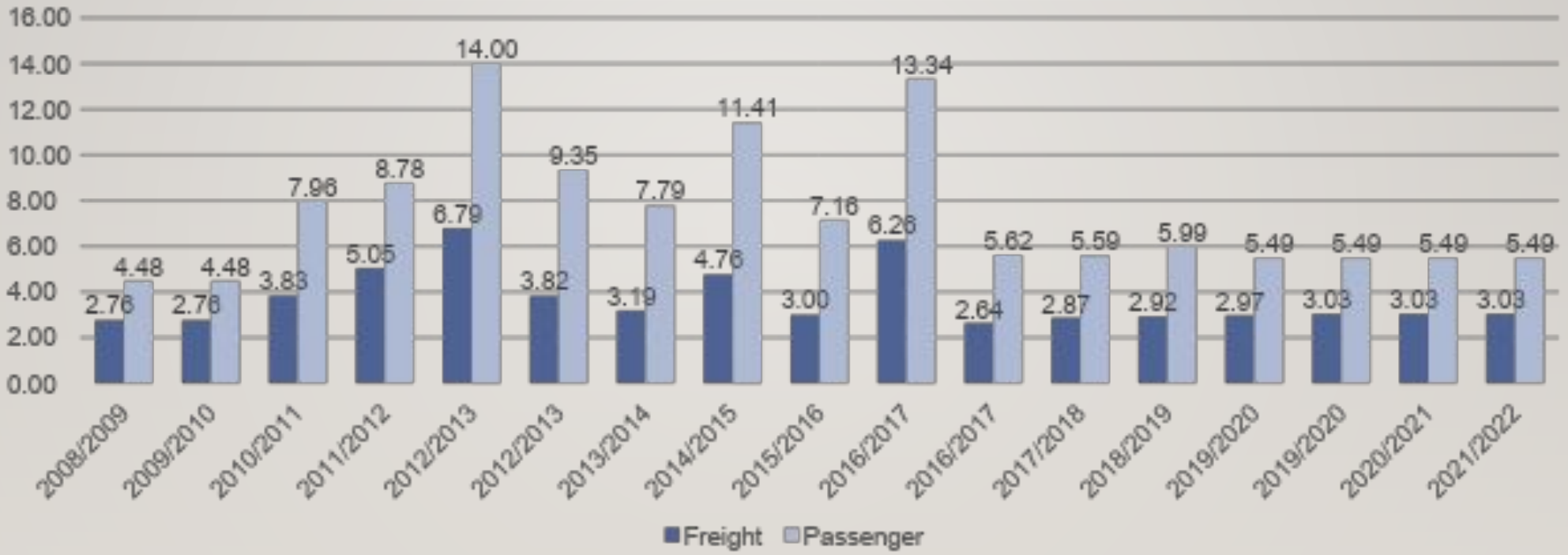
NETWORK STATEMENT (II)

- Requirements to be met by applicants and principles governing the right to operate traffic, licences, safety certificates, operation agreements, etc.
- Infrastructure, i.e. stations, halts, track gauges, loading profiles, axleload, gradients, electrification, speed, communication systems, etc.
- Regulations governing applications for infrastructure capacity, as well as principles and criteria for capacity allocation
- Fee system including fees and charges for certain individually specified services

CASE STUDY - CROATIA

LOOK INTO OUR YARD!

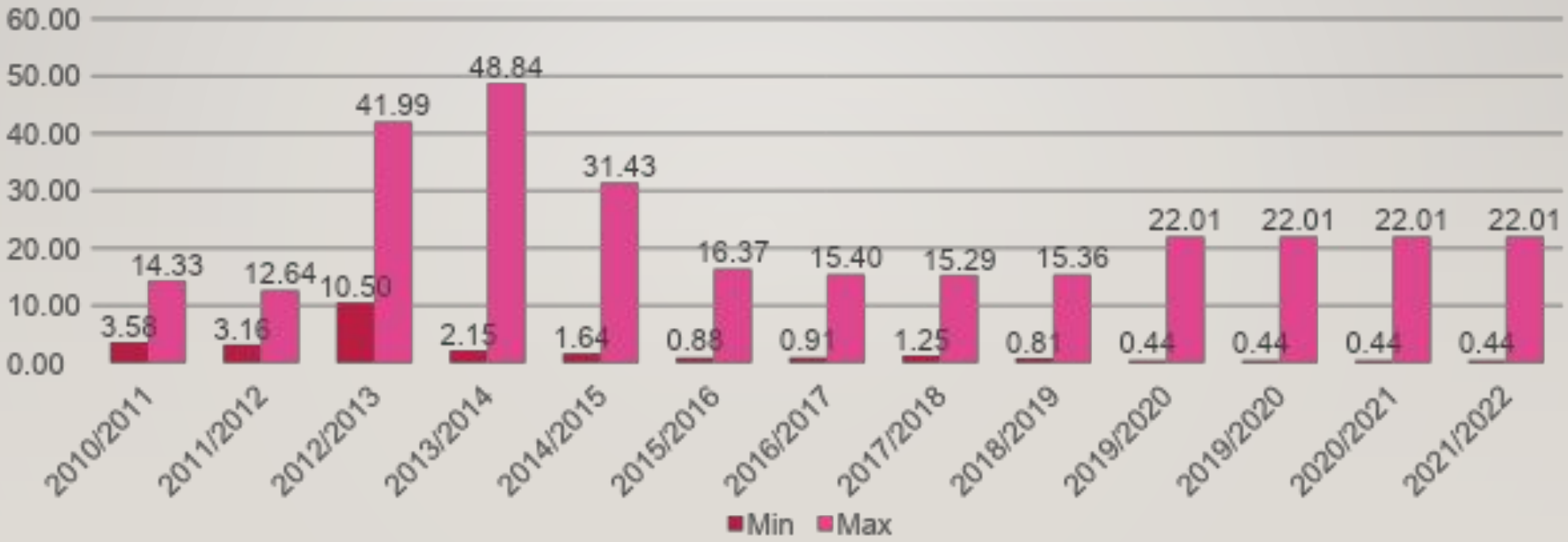
BASIC PRICE [HRK/TKM]



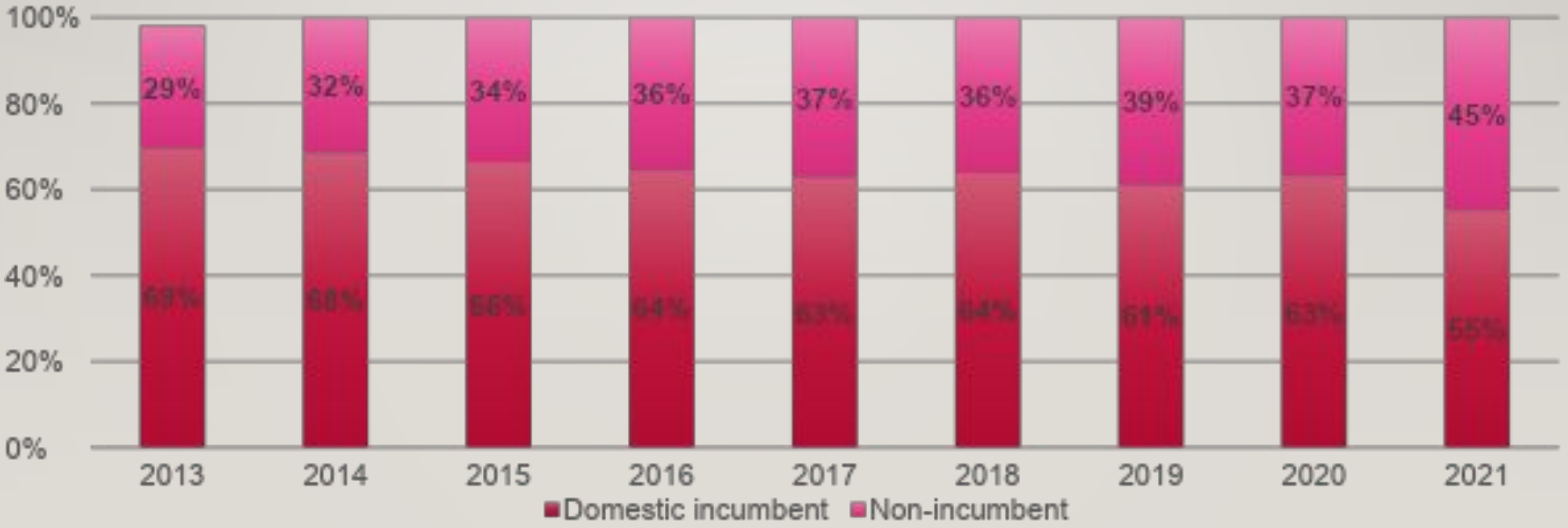
NETWORK STATEMENT - PRICES

- 2021 - NS 2023 – TT 2022/2023
  - Freight
    - 66 different prices

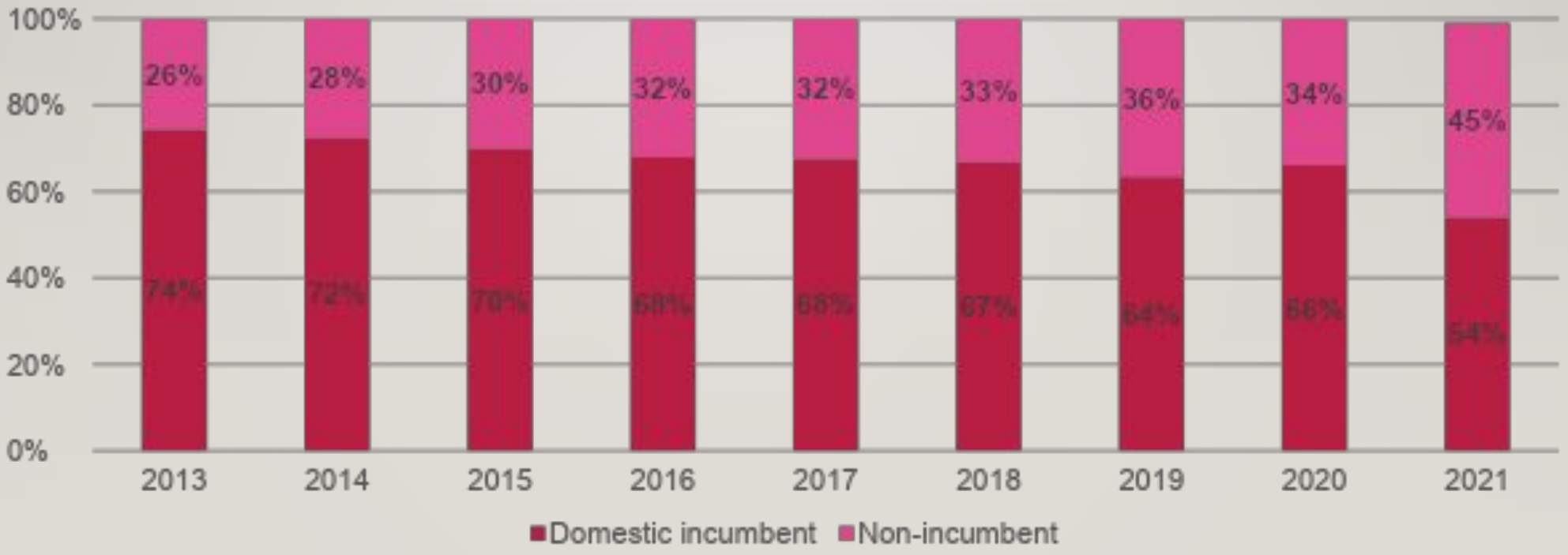
FREIGHT PRICE



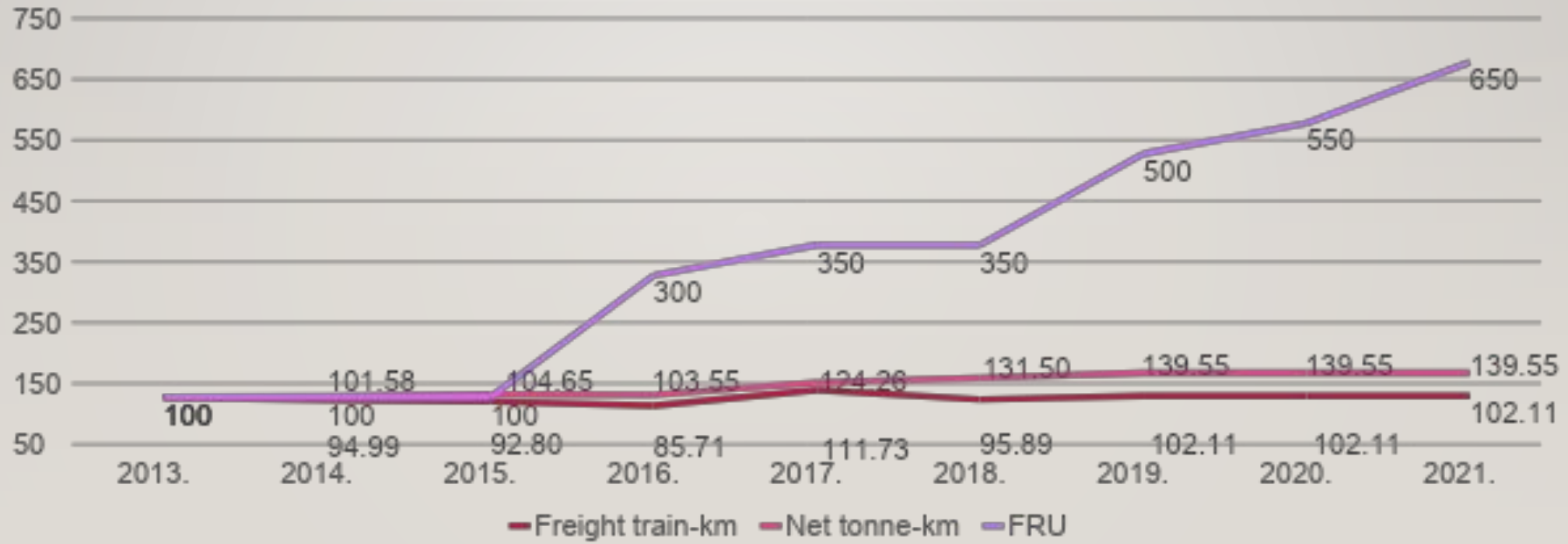
RU FREIGHT SHARE [TRAIN KM]



RU FREIGHT SHARE [NET TONNE KM]



RECAPITULATION FREIGHT



CONCLUSION

- IM change MAP methodologies from 2013 to 2021 tree times
  - No impact on market
- The number of new FRU in HR is gradually growing
  - From 2013 to 2021 number od participant growing from 2 to 13 new FRU's
  - From 2013 to 2021 new FRU's participating wit 45 % market share in total ntkm and tkm
- Croatia rail freight market is a significant indicator of the positive impact of liberalisation on the market development

THANK YOU FOR YOUR ATTENTION!

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