

Network Rail leading Europe

Challenging assumptions about our relative performance

Network Rail in comparison: safety risk

European Railway Agency analysis shows the UK to have the second lowest risk of fatalities and weighted injuries, behind only Luxembourg.

On risk at level crossings the UK is surpassed only by the Channel Tunnel (which has none) and Ireland.

Source: European Rail Agency "Report on technical benchmarking of European railways", 2011

ERA's template press release for any incidents for the UK states:

"Overall, the safety performance of the United Kingdom is one of the best compared to other Member States."

Source: template press release, provided by ERA

UK railway record on fatalities (above) and level crossing risk (below)

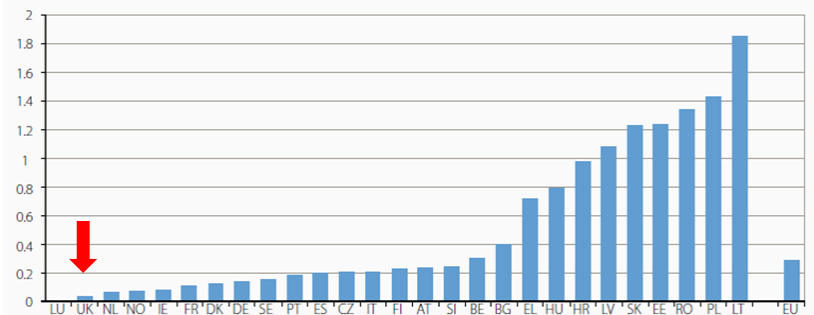


Figure 2: Railway fatalities and weighted serious injuries per million train-km (2007-2012)

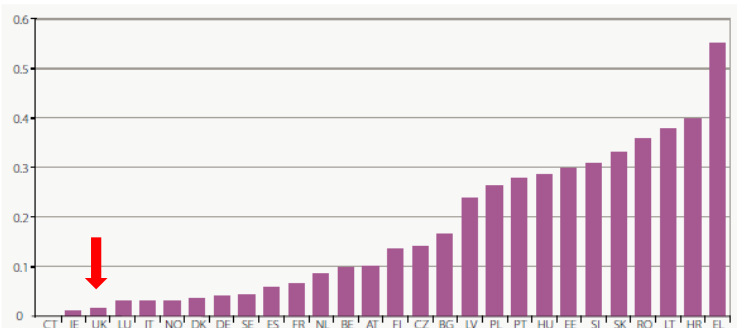


Figure 29: Fatality risk at level crossings: Level-crossing fatalities per million train-km (EU-28: 2010-2012)

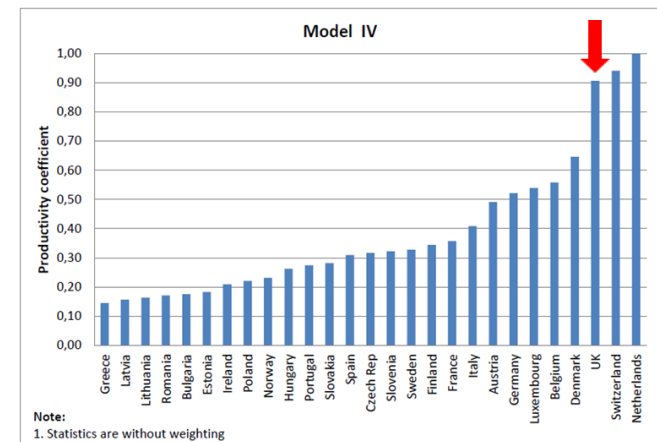
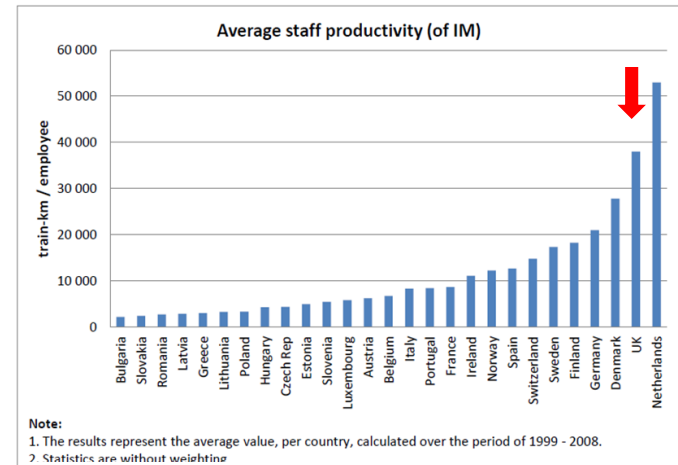
Network Rail in comparison: efficiency

ERA analysis also places the UK at the top end of efficiency rankings, in front of Germany and France.

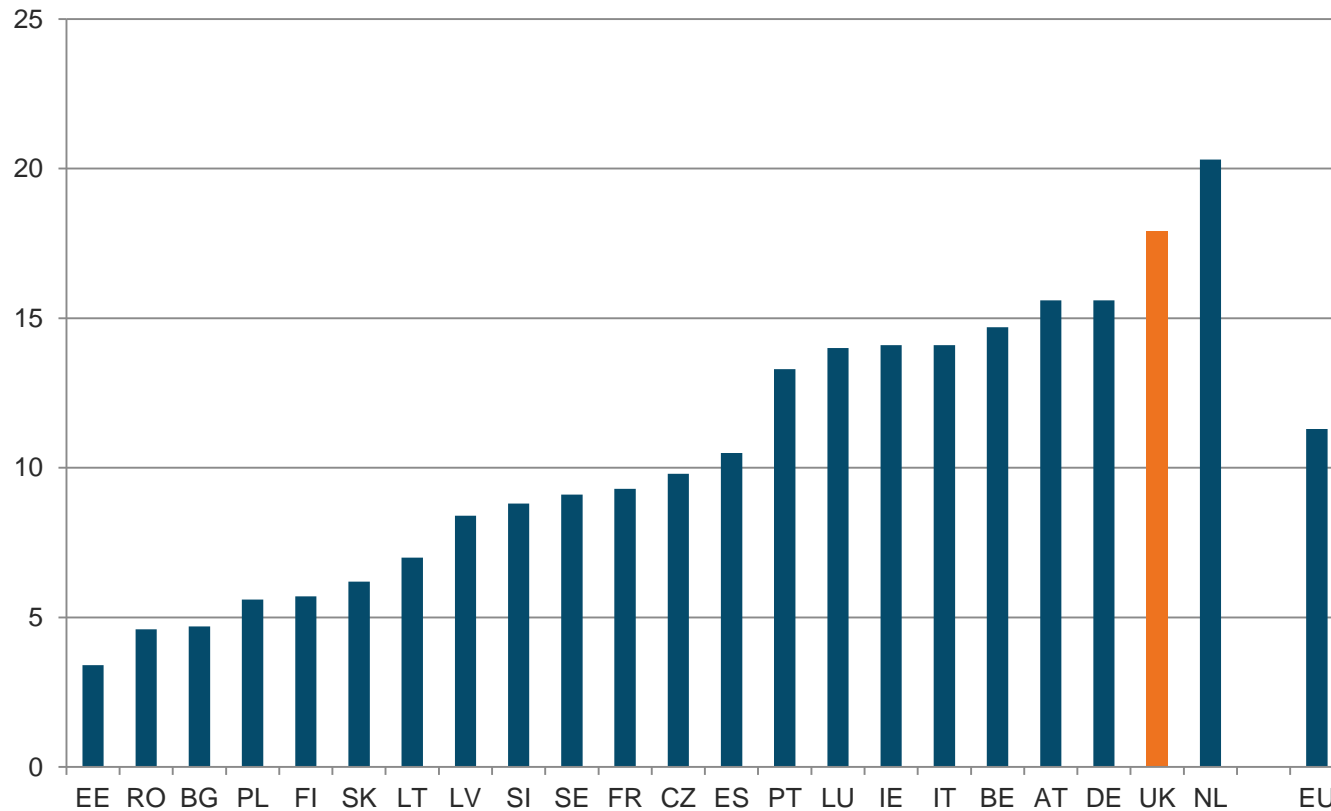
In terms of staff productivity of infrastructure managers Network Rail is second only to the Dutch.

ERA's econometric modelling also places the UK at the top end of the rankings on several of their models, competitive with the Swiss and Dutch as Europe's most efficient.

Source: European Rail Agency "Report on technical benchmarking of European railways", 2011

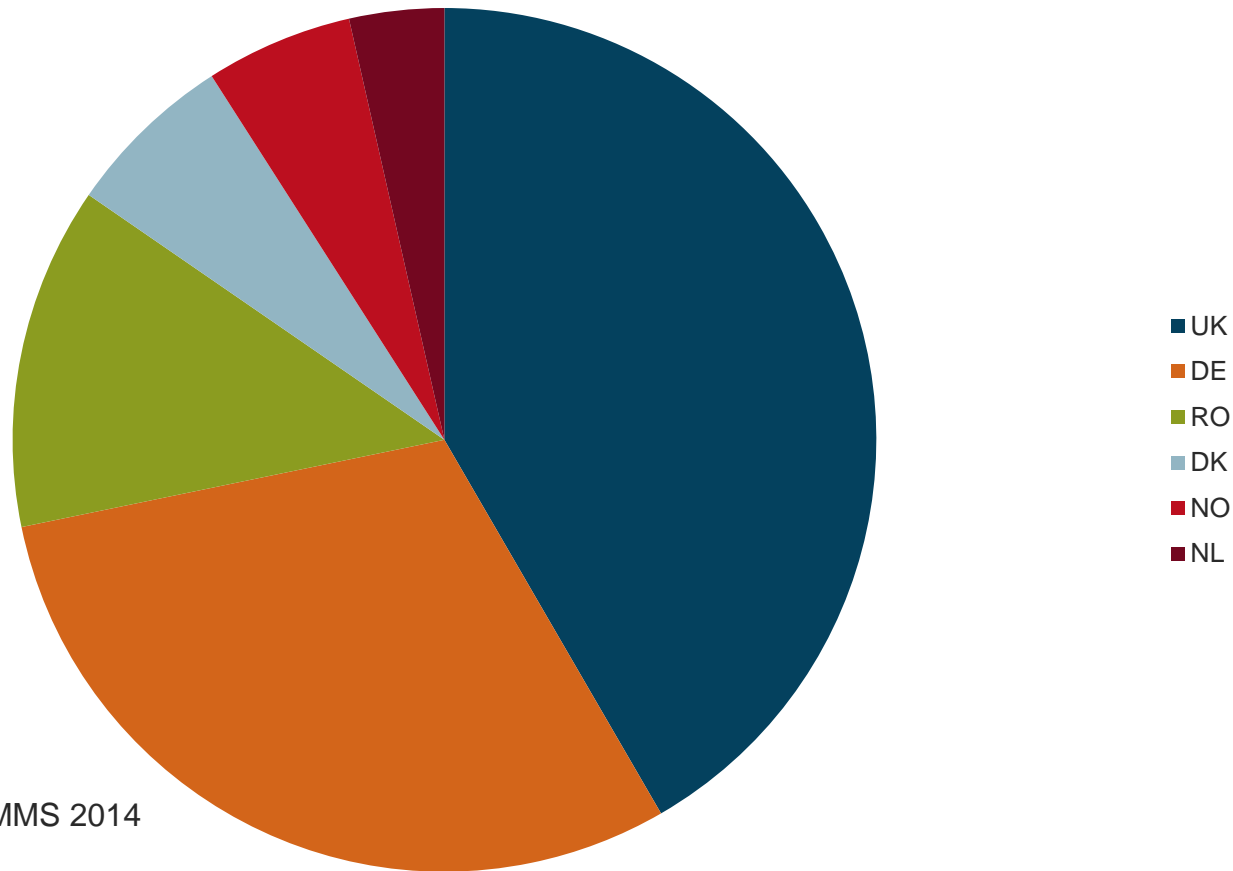


The UK has the EU's second most intensively used railway



1000 train km per km of track, data from EU 2014 Rail
Market Monitoring Study report, p36

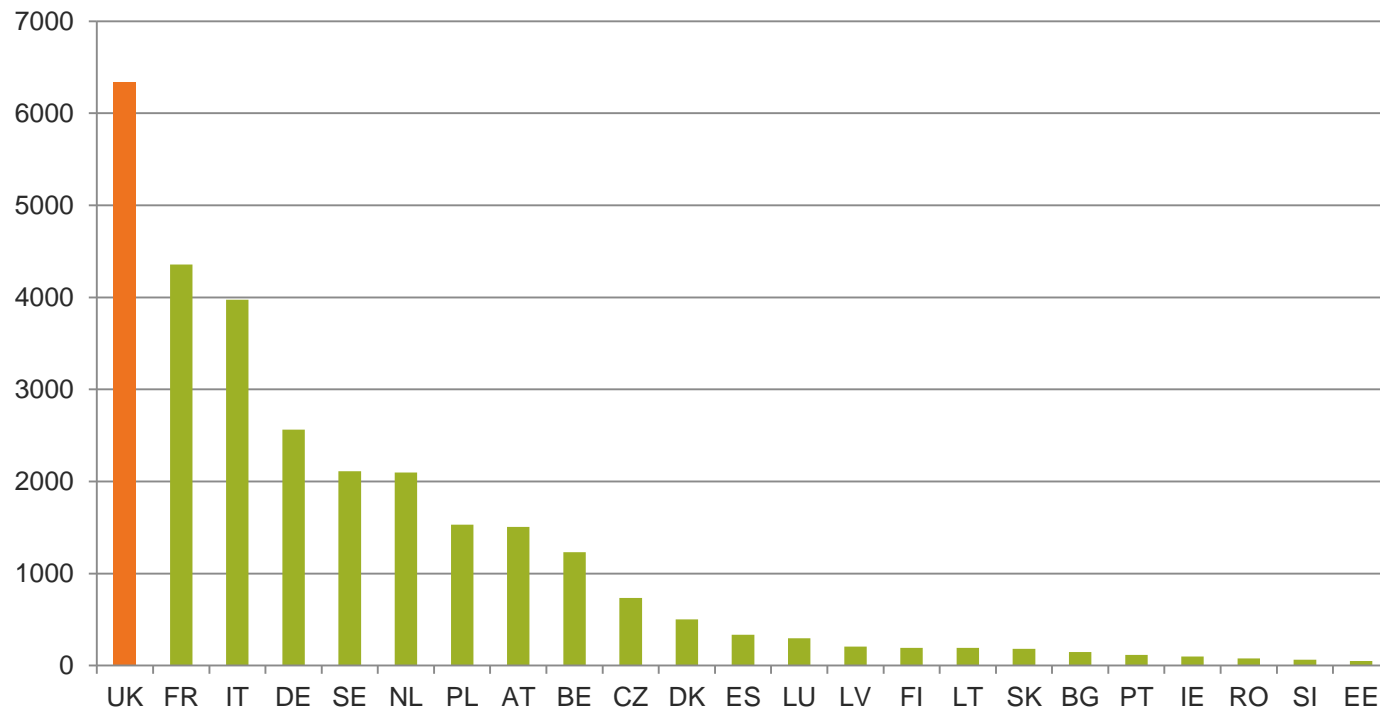
The UK has nearly half of the EU's declared congested infrastructure



Data from EU RMMS 2014

The UK is investing more than anyone else in Europe in its railways

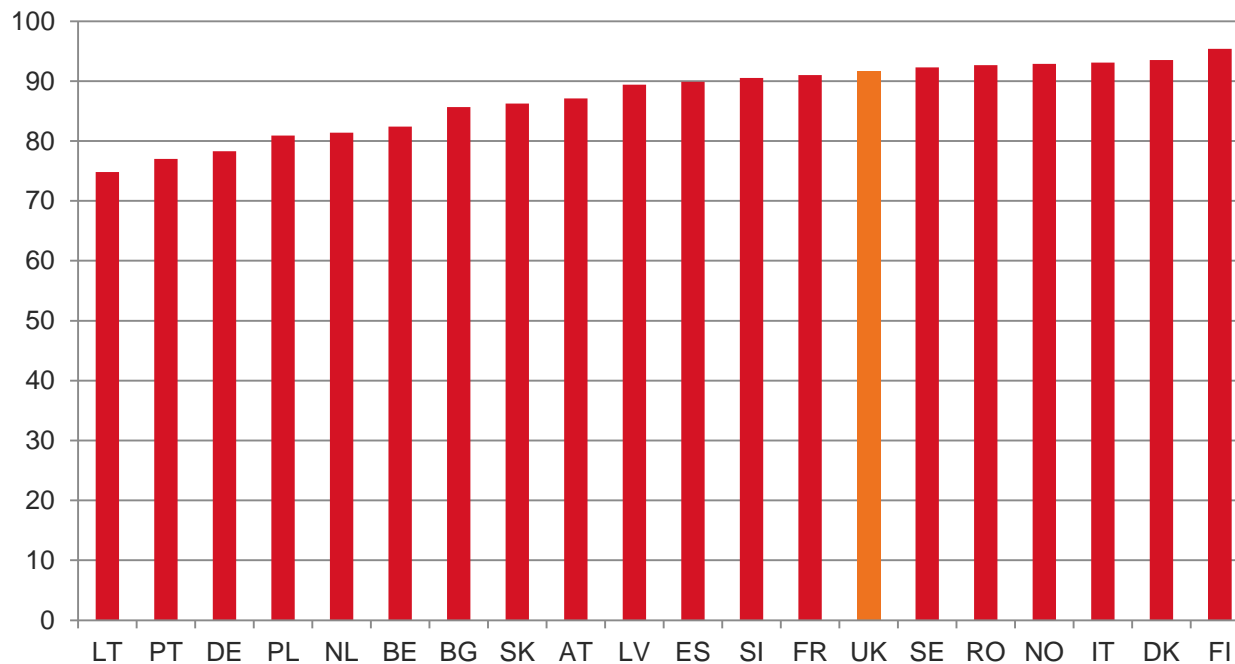
Investment, m EUR



Data from EU RMMS 2014

UK performs well on punctuality

Punctuality (long distance)



Data from EU RMMS 2014, 15 minute delay on long distance services

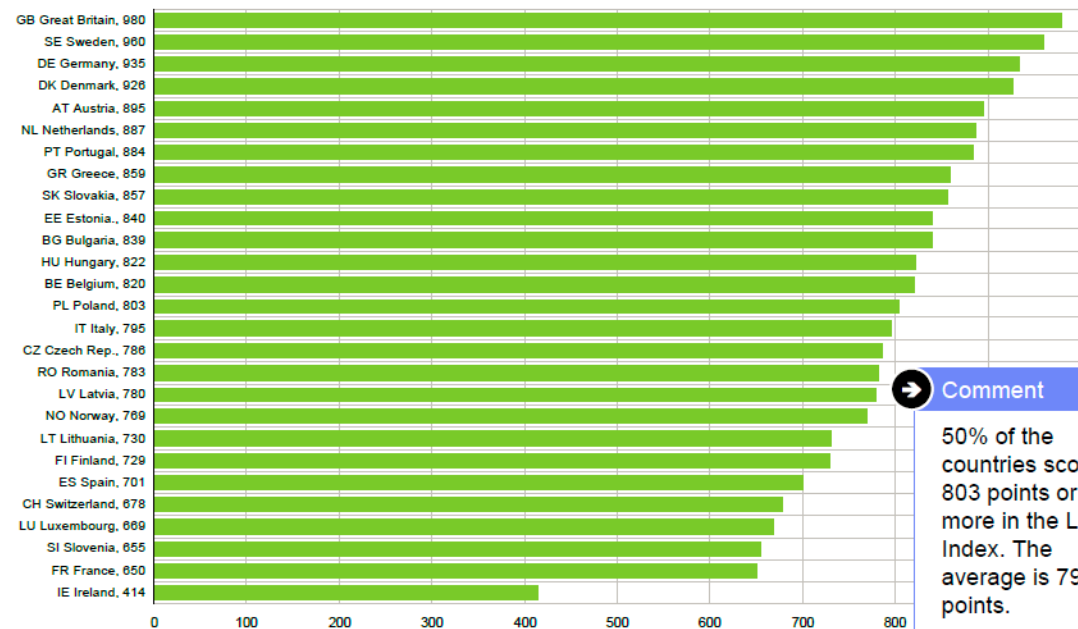
UK is the most liberalised railway



LEX Index 2011 (passenger and freight transport):
All countries have developed positively in the LEX Index.

IBM's rail liberalisation index, produced for Deutsche Bahn, consistently puts the GB railway at the top of the rankings for liberalisation. The most recent version, from 2011, continues this trend.

(IBM: Index of Liberalisation 2011)



➔ Comment

50% of the countries scored 803 points or more in the LEX Index. The average is 794 points.

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IBM-INDEX

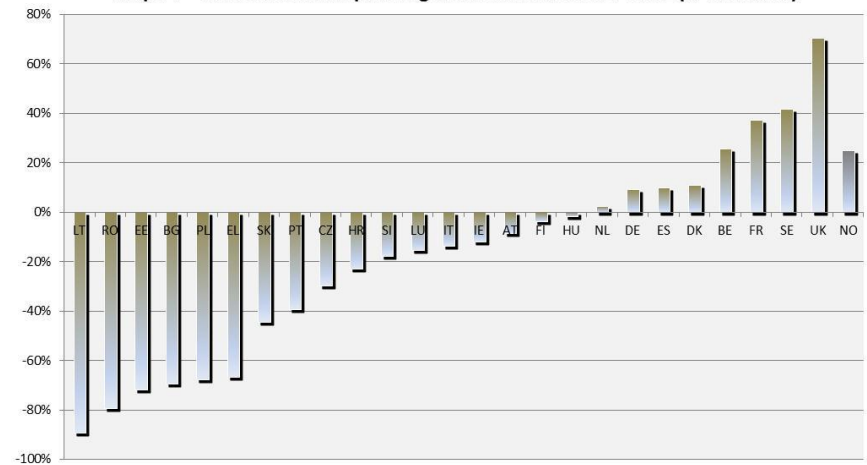
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Fast growth

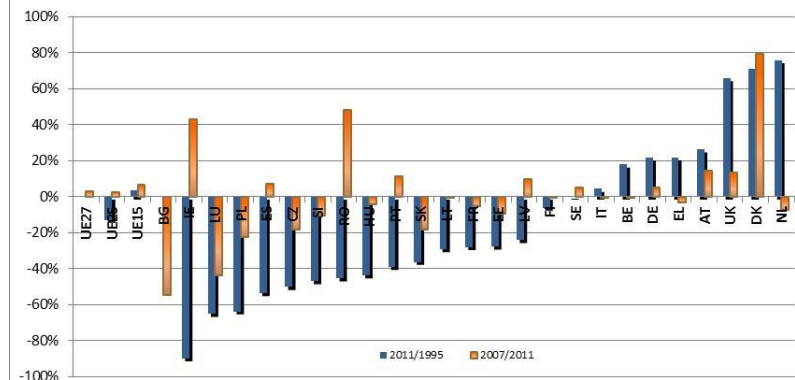
Rail in Great Britain has seen very fast growth in comparison with EU comparators. The top graph shows the UK position as by far the fastest growth in the period 1995-2011; even after such fast growth the UK was the fourth fastest growing passenger railway in the EU in the period 2010-12.

Freight services also show strong growth, with very rapid growth in the early years of liberalisation continuing now at a slower rate.

Graph 7 - Evolution of rail passenger modal share 1995-2011 (% variation)



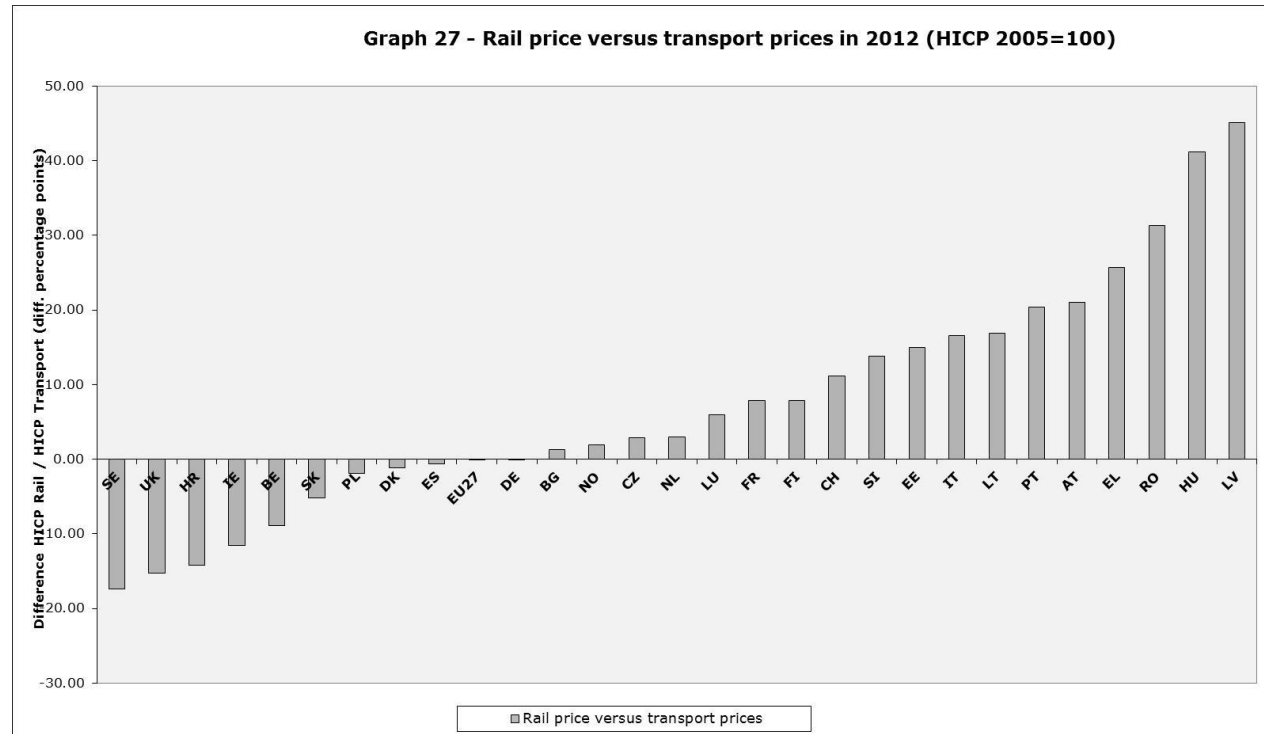
Graph 11 - Evolution of the modal share of rail freight



RMMS 2014

Prices relative to transport prices

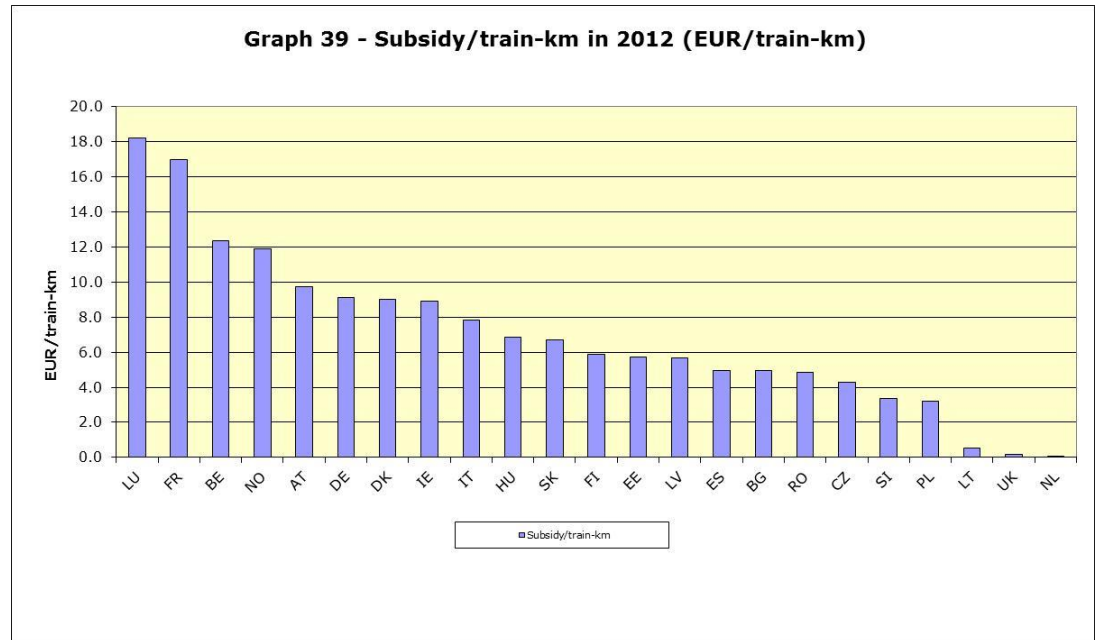
When compared to transport prices in general, the UK saw the second largest fall in rail prices, behind only Sweden, in the period 2005-2011, falling 15%. (RMMS 2014)



Low levels of subsidy

The graph shows spectacularly lower levels of subsidy in the UK and Netherlands compared to the rest of Europe; this is partly a product of cross-subsidy within franchises as well as genuinely lower levels of support.

Source: RMMS 2014



Rail in Europe – EU Scorecard



The European Commission's annual transport scoreboard, based on number of measures across all transport modes, shows the UK scoring well, coming fourth overall in transport, and joint first in rail.

Rail - Single Market	Freight	13,3 9%	36,5 0%	13,6 6%	2 7%	28,6 0%	3 0%	0%	0%	16,7 5%	3 2%	-	24,1 0%	n.a.	22,6 0%	0%	-	31,8 0%	n.a.	3 6%	17,6 0%	32,9 3%	-	53,6 8%	-	11,7 6%	0%	-	53,6 0%	2 8%
	Passenger	0, 6%	0%	2,9 4%	1 0%	1 0%	5 6%	0%	0%	0%	0%	-	8,3 0%	n.a.	11,7 0%	0%	-	2,9 0%	n.a.	5%	5,7 0%	51,4 0%	-	20,6 1%	-	0%	0%	-	90,2 0%	2 1%
Rail - Infrastructure		4,96	3,05	4,59	4,47	5,72	3,56	4,05	2,73	5,88	6,29	3,10	4,24	n.a.	4,18	4,67	5,03	3,56	n.a.	5,48	5,22	2,56	4,44	2,33	3,24	4,35	5,87	4,57	5,01	4,35
Rail - Environmental impact		85,5	70,3	34,0	23,6	59,2	16,7	2,7	17,1	60,6	54,2	36,1	71,1	n.a.	13,4	6,9	95,3	38,3	n.a.	75,2	70,9	60,5	64,1	37,4	41,4	43,9	53,4	73,6	34,1	53,5
Rail - Safety		0,34	2,33	0,57	0,29	0,29	2,00	0	1,44	0,29	0,23	2,11	0,34	n.a.	1,38	1,90	0	1,42	n.a.	0,41	0,68	2,24	1,07	2,86	0,59	2,48	0,29	0,23	0,10	1,00
Rail - Infringements		3	2	2	1	1	1	0	2	4	3	-	2	n.a.	2	2	1	2	n.a.	0	2	4	3	2	3	1	2	0	1	46
		BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	EU

High performer
Low performer
EU

- UK Rail scores well on:
 - Single Market (market share of “all but the principal railway undertaking”);
 - Safety (fatalities and serious injuries per million train-km); and
 - Infringements (cases opened by the Commission and pending judgements by ECJ – N.B. The UK case on channel tunnel is likely to be lifted shortly).
- The only areas UK rail does not lead on are quality of infrastructure, where it is just outside the leading group, and environmental impact which is based on electrification.
- It is worth noting that fully unbundled railways clearly lead the pack, with UK, Netherlands and Sweden all doing very well.

GB Rail in comparison: passenger satisfaction

Eurobarometer research produced a satisfaction index for railway travel and stations

The UK comes second only to Finland, and has the most “highly satisfied” respondents of any member state.

British respondents also expressed the highest satisfaction of all with stations, frequency of trains and provision of information during disruption.

The UK also comes top on a range of accessibility measures, including stations, trains and ticket booking.

Source: Eurobarometer report 382a “Europeans’ satisfaction with rail services” p94

Combined satisfaction index for railway travel and stations

