

---

# Measuring the Market

prepared by

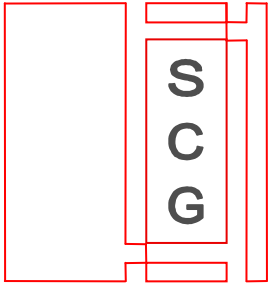
**Coen Timmerman**

NMa

**&**

**Roland Beier**

SCG



# Task of regulators

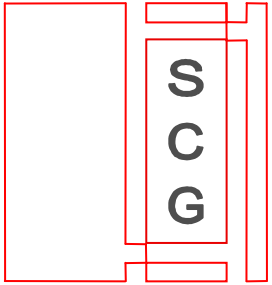
---

**Directive 2001/14 and 91/440/EEC and Regulation for freight:**

→ competences

**Monitor: article 10 (7) 91/440**

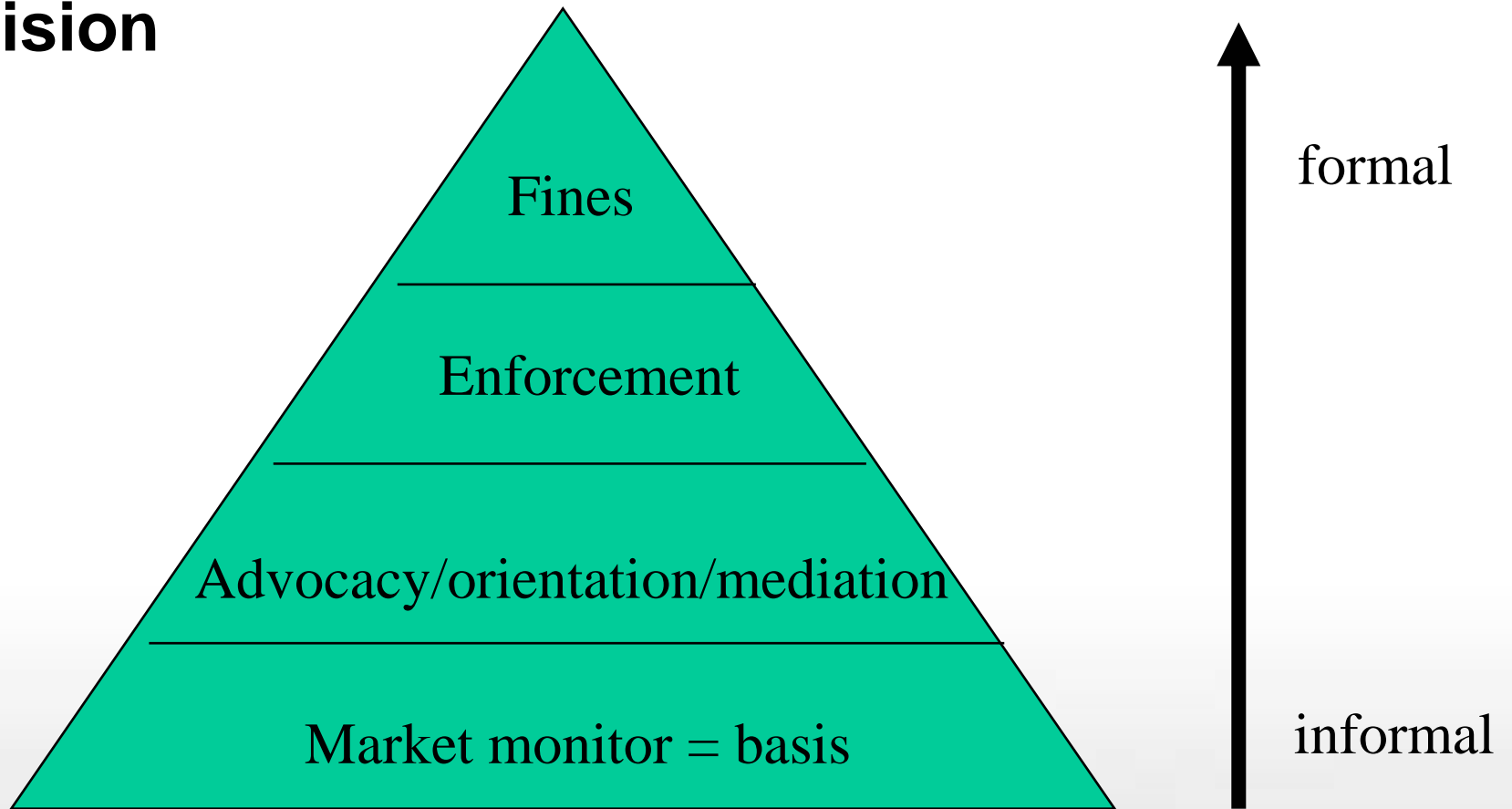
***“(...) the regulatory body established pursuant to Article 30 of Directive 2000/14/EC, or any other body enjoying the same degree of independence shall monitor the competition in the rail services markets, including the rail freight transport market”***

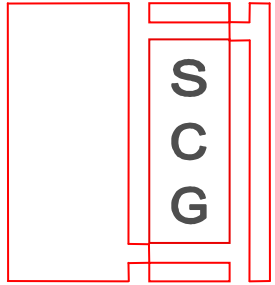


# How to regulate markets?



## Supervision



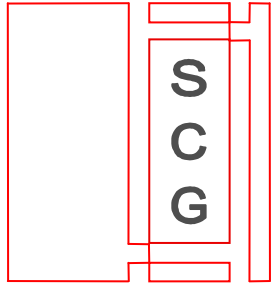


# Why market monitoring?



## National

- **Getting acquainted/knowledge**
- **Personnel acquaintance (if you pay visits)**
- **Introduction and visibility of the regulator**
- **Basis for ex officio prioritization (pick your fights in a transparent way; from all the points you found you can choose the most relevant); criteria for good supervision**
- **Input for working program**
- **Leads to efficient supervision**
- **Prevention (by consulting the sector)**
- **Result: we have few complaints so the market is doing fine (with a monitor you get to know the market)**



# Why market monitoring?

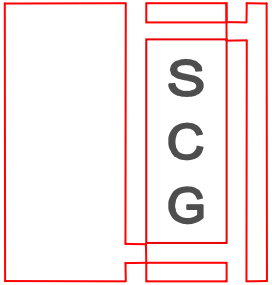


## International

- **Start of a working group**
- **Comparing markets and harmonising of results**
- **Improve monitor by exchanging experiences (statistical data, questionnaire)**
- **Gain more knowledge about international markets; understand how the European railway market performs;**



**investing in knowledge instead of buying it!**



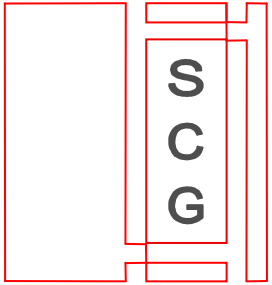
# Case in Austria



## Market monitoring since 2006

### Contents of the annual survey:

- Collecting hard facts
- Survey on view of train operators



# Case in Austria



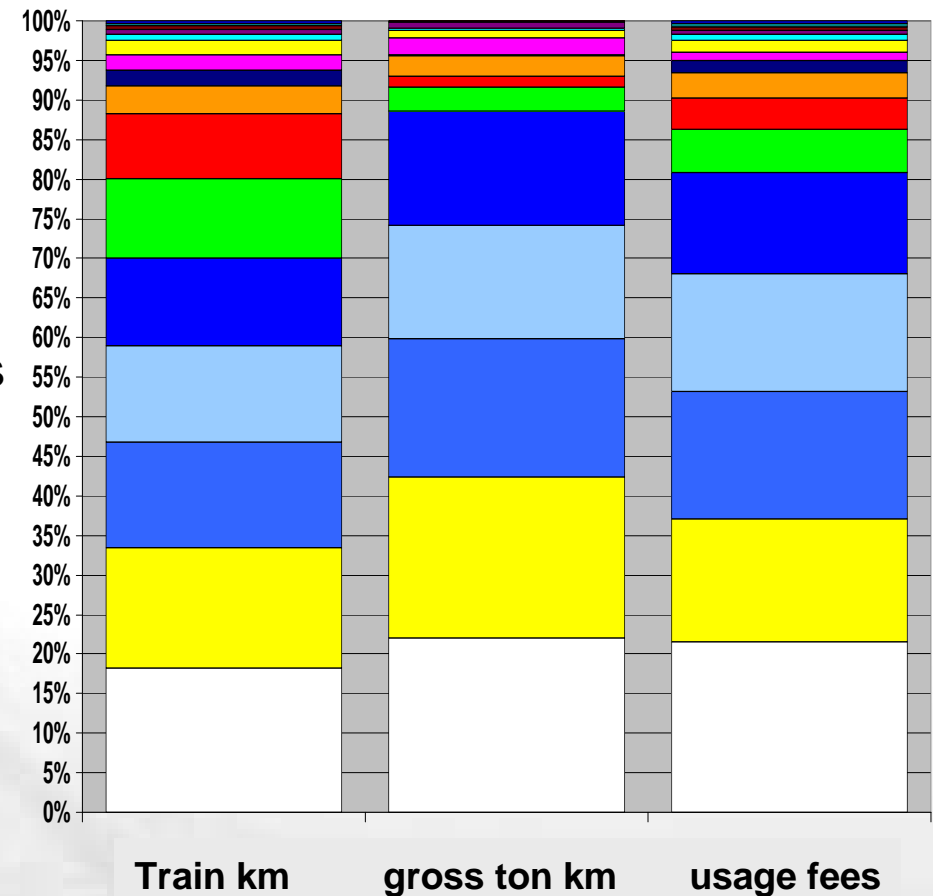
## Hard facts (1):

- company data:
  - ownership
  - employees
  - service facilities
  - co-operation with other operators
  
- rolling stock:
  - locomotives
    - technical data
    - approval by countries
    - ATP systems installed
  - passenger coaches
  - freight wagons

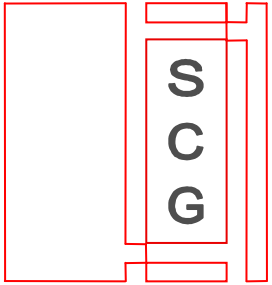
## Hard facts (2):

- Performance data:
  - train kilometres
  - passengers carried and passenger kilometres
  - freight volume and freight kilometres
  - Energy consumption
  - ...

Shares of RUs without incumbent





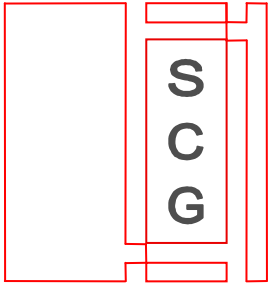


# Case in Austria



## View of train operators

- This part of the questionnaire focuses on the factors influencing the railway market. The general question is, 'which parameter is the most important obstacle when entering new railway markets' rated by 1-5 (1 least, 5 worst)
- Each operator (incl. incumbent) rates the various factors from his point of view.
- The regulatory body analyses the different ratings

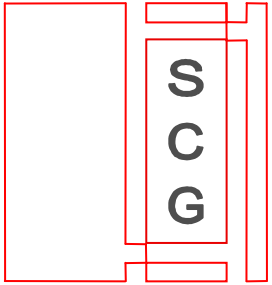


## Case in Austria



### Results of monitoring:

- Comparable statistics since 2006
- Measuring of progress in liberalisation
- Identifying structural problems
- Input for the agenda of the regulator
- Input for discussions with infrastructure managers



# Statements



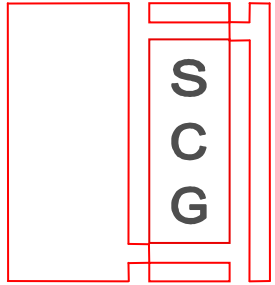
## **A monitor leads to:**

- Visibility of the regulator
- Knowledge of the market/from the market
- Transparent and fair regulation and prevention of infringements

**It is an essential instrument for regulators!**

**If a regulator takes himself serious he will start a monitor!**

**No complaints, no problems is no regulation!!**



# Measuring the market



**Thank you for your attention!**

*further information:*

Schienen-Control GmbH  
Frankenberggasse 9/5, A-1040 Wien  
Tel.: +43 1 505 0707  
Fax: +43 1 505 0707 17  
Email: [office@scg.gv.at](mailto:office@scg.gv.at)  
Internet: [www.scg.gv.at](http://www.scg.gv.at)