

# Competition in High Speed Services The SPANISH MODEL

25th Florence Rail Forum  
Evaluating the Recast Directive

June, 24<sup>th</sup> 2024



## Big figures on liberalisation of rail passenger transport in Spain

10

10 millions more of passengers with liberalisation process

60

60% more seats with the entry of new RU's

42

42% passengers can choose between 3 RU's

9

9 € is the price of a railway ticket

343

343 million € surplus for consumers

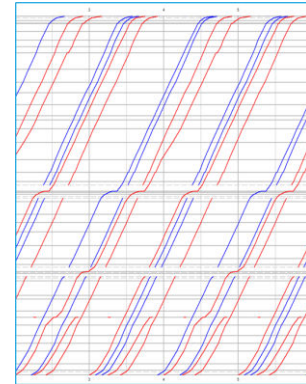
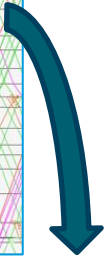
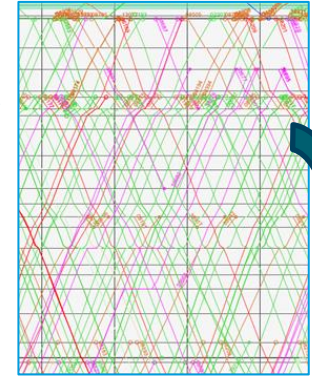
148

148 million € for ADIF-Alta Velocidad in terms of TAC



## Principles of the liberalisation process in ADIF (I)

- **ACTIVE ROLE:** new competitive model “in/by the market”
- **CAPACITY OPTIMIZATION PROCESS:** pre-assigned routes





## Principes of the liberalisation process in ADIF (II)

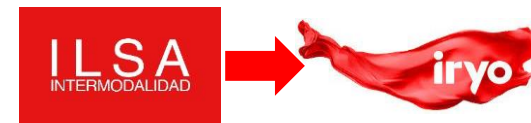
- **CAPACITY OFFER IN THREE PACKAGES:** adapted to the quality of previous services + frequency + train efficiency



Package A (December 2020)

*renfe*

Package B (November 2022)



Package C (May 2021)



- **FRAMEWORK AGREEMENTS: 10 year-term**



## Overcoming barriers



➤ Track capacity



➤ Charges



➤ Maintenance workshops



➤ Rolling stock interoperability



➤ IM's independence



**Tack så  
mycket!**

**Muito  
obrigada!**

**Thank you  
very much!**

**¡Merci  
beaucoup!**

**Vielen  
Dank!**

**Grazie  
mille!**

**¡Muchas  
gracias!**

**Hartelijk  
dank!**