



EXPERIENCES WITH OPEN ACCESS IN PASSENGER RAILWAY TRANSPORT – SLOVAKIA

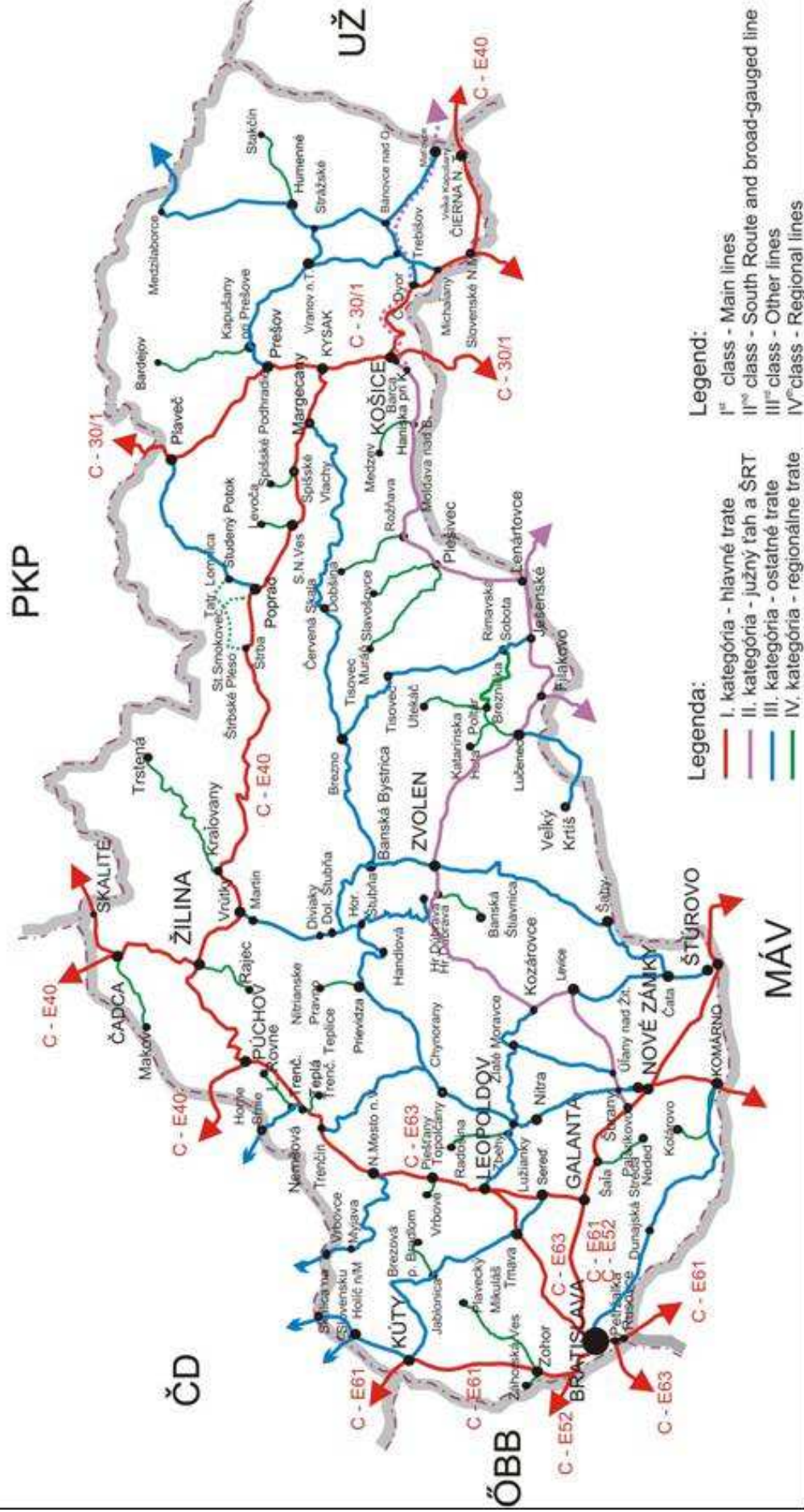
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Railway infrastructure in Slovakia

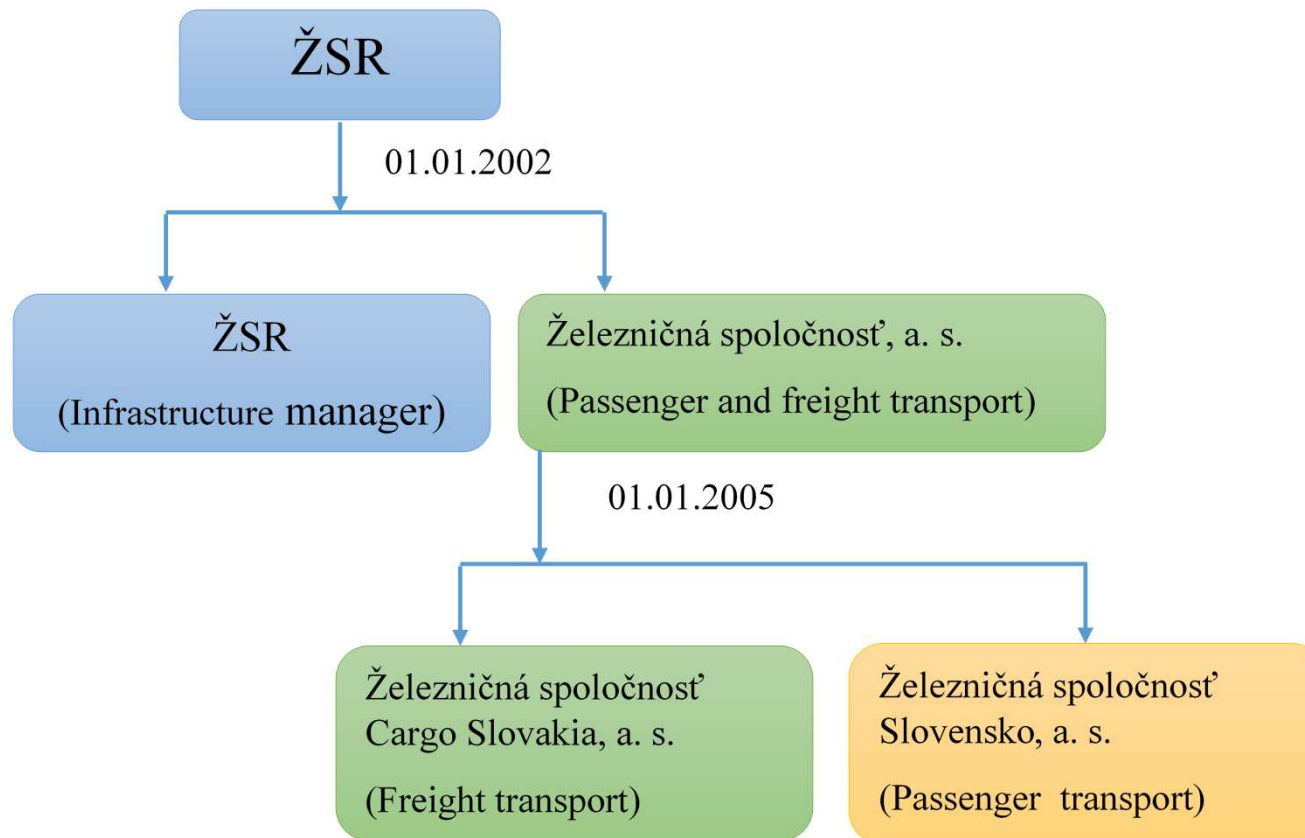
- 3 658 km of railway lines:
 - 2 491 km of single-track lines
 - 1 019 km of double-track lines
 - 1 577 km of electrified railway lines
- Approx. 30 mil trainkm/y ordered by Ministry
- 49 272 tous pass in 2014 - 60 566 tous pass in 2015



ŽELEZNIČNÉ TRATE V SR RAIL NETWORK IN THE SLOVAK REPUBLIC



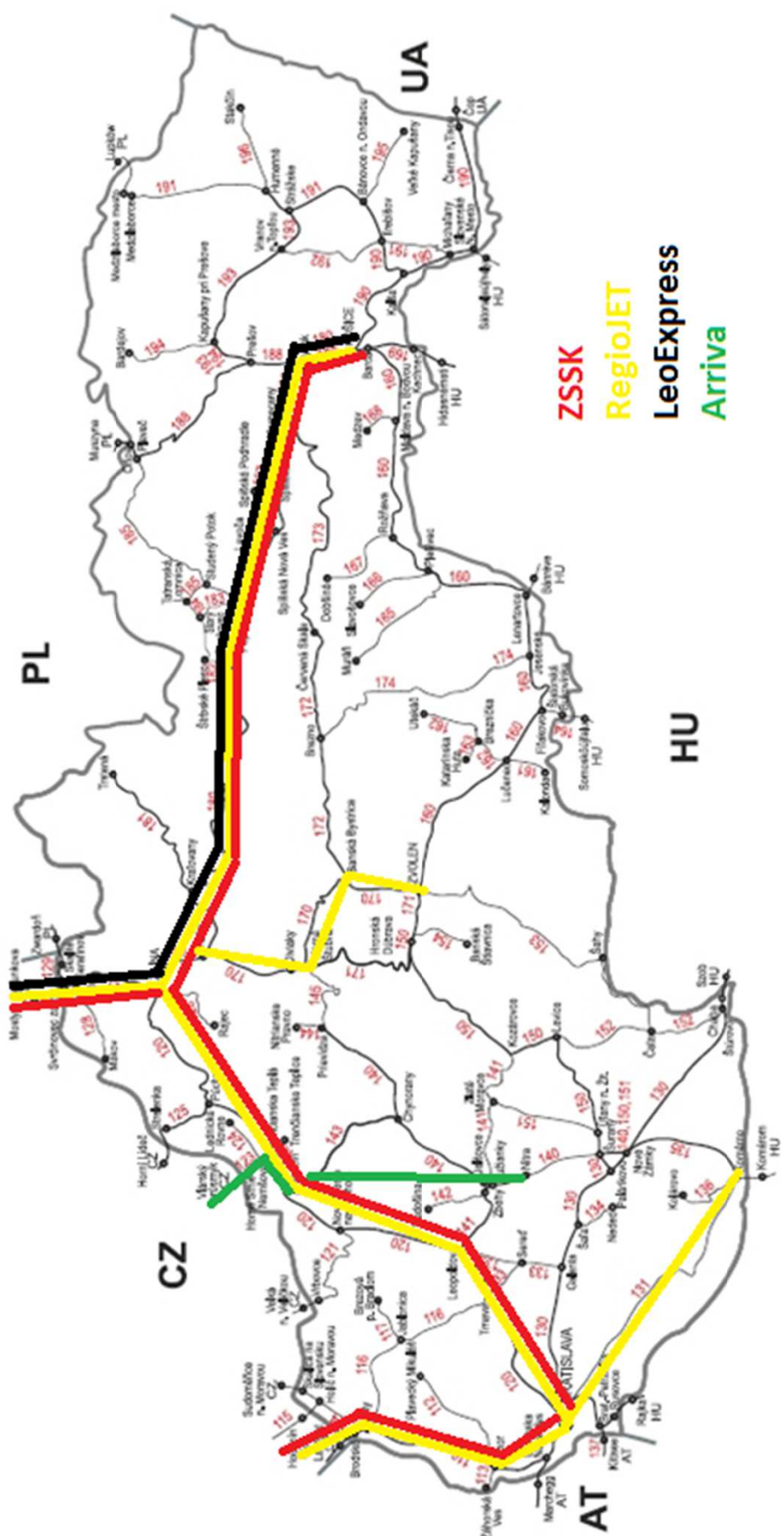
Slovak railway transport - transformation



Railway passenger transport

- full liberalization - from 1.1.2010
- nowadays - 9 companies have a valid license in SR, only 4 of them realize traffic in the network of ŽSR:
 - Železničná spoločnosť Slovensko, a.s (ZSSK)
 - RegioJet, a.s.
 - Leo Express
 - Arriva trains
- majority share - ZSSK (the founder and 100% shareholder is the SR) – in the 2014 – 84.79 %



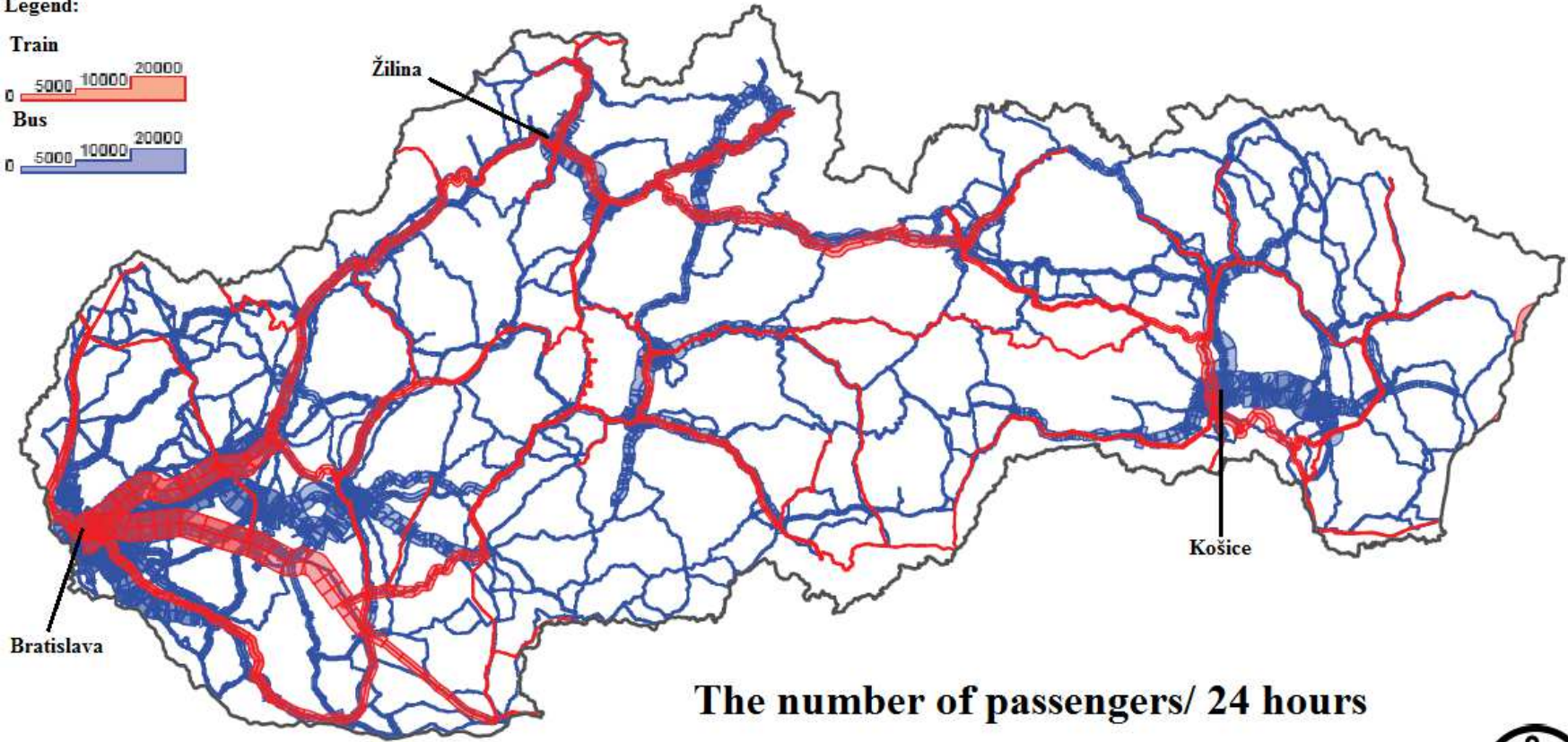
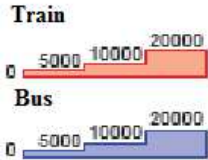


ZSSK
RegioJET
LeoExpress
Arriva



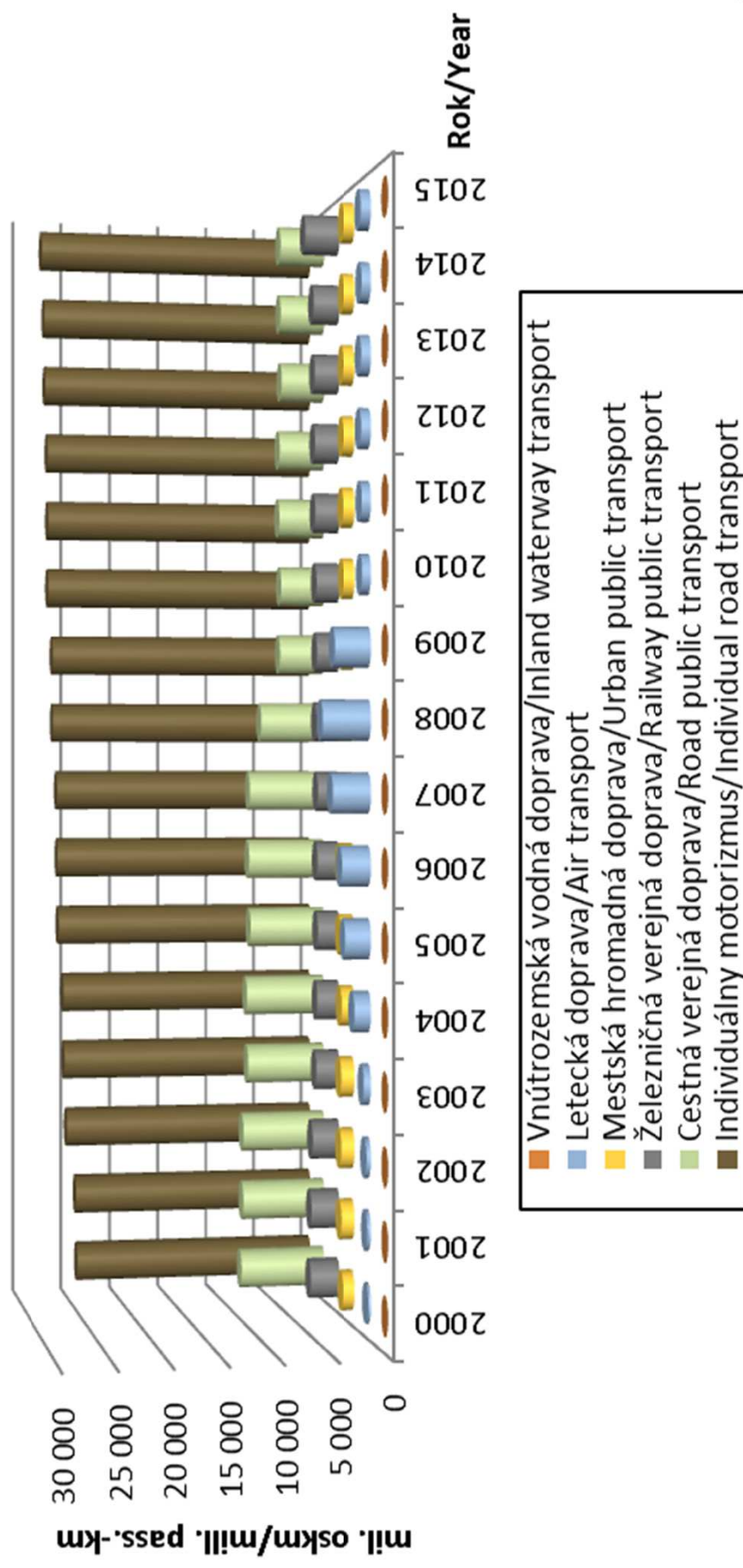
Public transport - density

Legend:

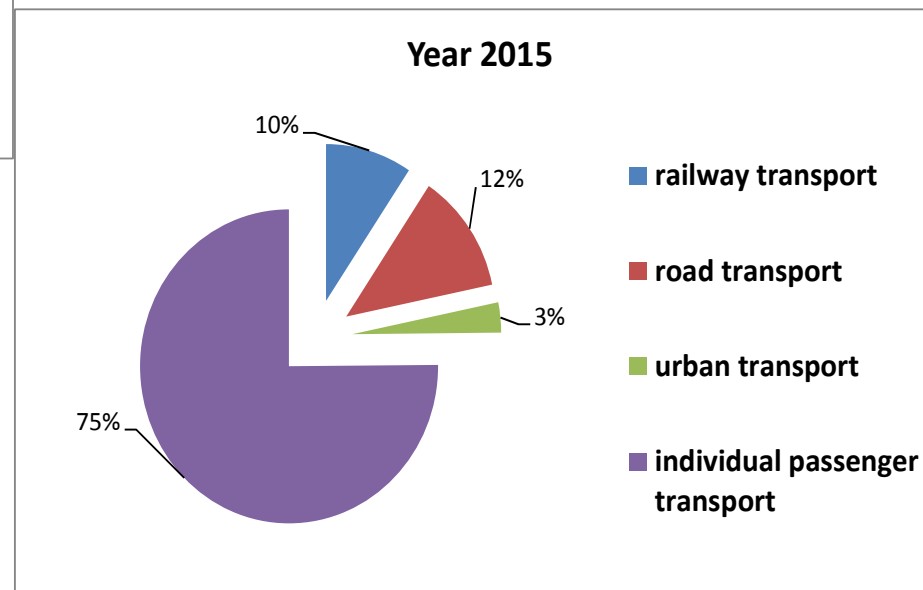
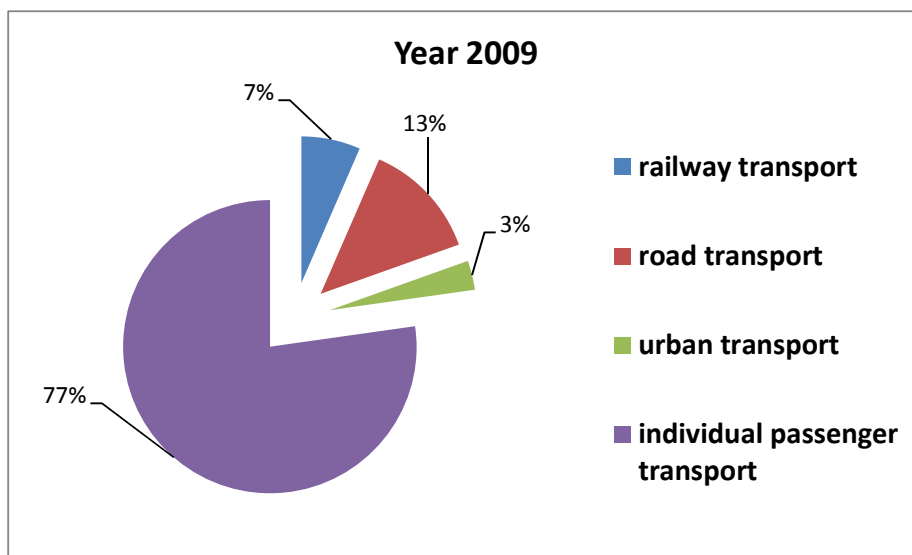


Prepravné výkony pri preprave osôb podľa druhov dopravy

Total passenger transport performances by mode



Modal split in passenger transport in Slovakia



Railway passenger market

	2010	2012		2014	
	passengers [mil.]	passengers [mil.]	rail market shares [%]	passengers [mil.]	rail market shares [%]
ZSSK	2 428	2 413	89.79	2 503	84.79
RegioJet, a.s.	-	275	10.21	449	15,20
Leo Express, a.s.	-	-	-	0.418	0.01
Total	2 428	2 688	100	2 952	100

Revenues and profit (thousand €)

	2013		2014		2015	
	Rev.	Profit	Rev.	Profit	Rev.	Profit
ZSSK	112 544	-1 452	110 043	-2 556	90 003	-3 899
RegioJet	1 865,0	135	2 772	-492	11 392	-5 378

Source: Annual report ZSSK, Finstat



Open access Bratislava – Žilina

	2015		2016		Difference [%]
	Number of train/day	Seat-km capacity - mil./year	Number of train/day	Seat-km capacity - mil./year	
Bratislava - Žilina					
ZSSK (Expresx)	12	643	12	619	-3.72
ZSSk (IC)	2	43			-100.00
RegioJet	4	88	3	110	25.00
Total	18	774	15	729	-5.84
Žilina - Bratislava					
ZSSK (Expresx)	13	658	12	614	-6.63
ZSSk (IC)	2	38			-100.00
RegioJet	4	75	3	110	45.96
Total	19	772	15	724	-6.15



Open access Žilina - Košice

	2015		2016		Difference [%]
	Number of train/day	Seat-km capacity - mil./year	Number of train/day	Seat-km capacity - mil./year	
Žilina - Košice					
ZSSK (Express)	12	626	11	608	-2.84
ZSSk (IC)	2	46			-100.00
RegioJet	6	123	5	231	87.33
LEO Express	1	42	2	97	128.10
Total	21	838	18	936	11.71
Košice - Žilina					
ZSSK (Express)	12	697	12	703	0.79
ZSSk (IC)	2	49			-100.00
RegioJet	5	145	5	238	63.85
LEO Express	1	42	2	97	128.10
Total	20	934	19	1 037	11.04



Private operator in Regional transport

- Track: Bratislava - Dunajská Streda - Komárno (100 km) - since 04.03.2012
- Contract for transport services in public interest
- Contract signed (27.12.2010) for 9 years
- Direct order without public tender
- Ordered train transport performance (y2016): 1 197 236 trainkm
- Ordered train transport performance could be changed every year (max. – 5%)
- Subsidies (y2016): 8 049 105.40 EUR
- Subsidies of Ministry per 1 tr.km: 5.82 €

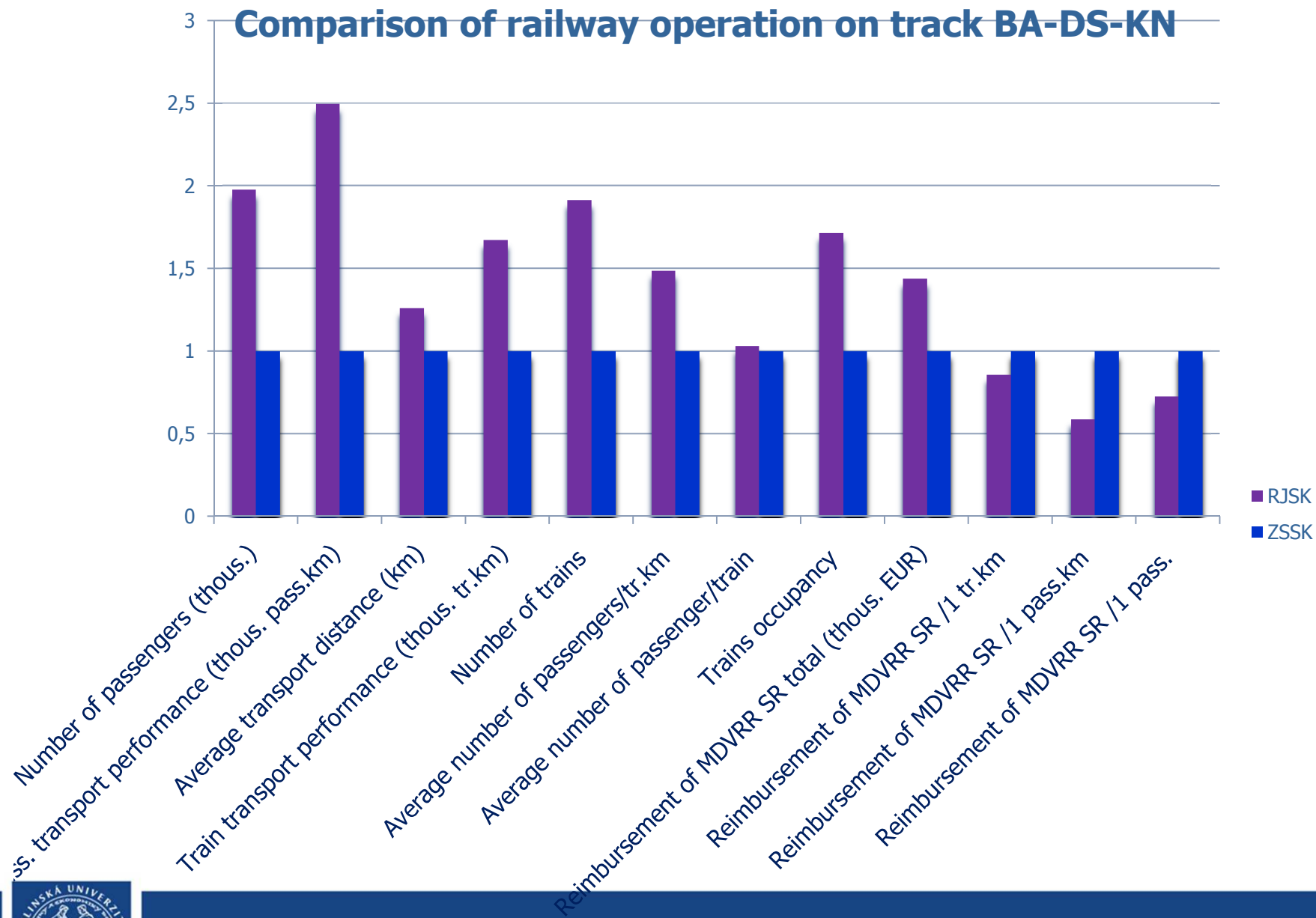


Comparison of the state and private operation

	RJSK	ZSSK	
12 months	2012-2013	2011-2012	Differ.
Number of passengers (thous.)	1 511.161	764.283	98%
Pass. transport performance (thous. pass.km)	54 516.027	21 850.851	150%
Average transport distance (km)	36.080	28.590	26%
Train transport performance (thous. tr.km)	1 204.473	719.057	68%
Number of trains /year	17 475	9 127	91%
Average number of passengers/tr.km	45.260	30.390	49%
Average number of passenger/train	86.480	83.740	3%
Trains occupancy	0.290	0.169	72%
Reimbursement of MDVRR SR total (thous. EUR)	7 014.796	4 875.206	44%
Subsidies of Ministry /1 tr.km	5.820	6.780	-14%
Subsidies of Ministry /1 pass.km	0.130	0.220	-42%
Subsidies of Ministry /1 pass.	4.640	6.380	-27%



Comparison of railway operation on track BA-DS-KN



Future of Open Access in Long-distance transport

- Public tender for line Bratislava – Banská Bystrica (230km)
 - first conditions (November 2015):
 - 1.5 mil trainkm per year (actually 1.2 mil)
 - 10 years contract
 - min 7+1 train set with capacity 530 seats in one set
 - expected payment over 10 mil €/y
 - deadline for application 15th January 2016
 - actual tenders: aprox. 8 companies – ZSSK, RegioJet, LeoExpress, Arriva, CD, LTE, OBB, ...
- Waiting for next step...



Conclusions 1

- the share of rail passenger transport in SR – slowly increasing trend
- increase – quality of services
- many line – periodic timetable
- from November 2014 - zero – fares in rail for students and pensioners
- individual passenger transport – increase approximately 130 mil. pass. km per year
- main problems:
 - No coordination - duplicate transport connections in the same time (bus, train)
 - None integrated transport systems



Conclusions 2

- From 2016/17 – new lines with Open access: Bratislava – Praha, Praha – Trenčín – Nitra
- Open access – battle for passengers instead of competition for lines
 - increasing (limited) quality and better prices for passengers
 - battle on transport market – no cooperation between operators, many problems in daily operation, increasing negative profit
 - Private operator want to have public transport contract too – started like OA but goal is no Open Access
- Positive experiences with private operator in regional transport (without public tender, with increasing trainkm)
- Waiting for next steps in public tender BA-BB



THANK YOU FOR YOUR ATTENTION!

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