

PRESS RELEASE

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In 2022, operating costs of regional express trains was higher in France than in neighbouring countries

The French Transport Regulatory Authority (ART) publishes the full report that completes the “Essential” report on the passenger and freight rail transport market in 2022. Through thematic analyses, the report shows a decline in quality of service (railway infrastructure in a state of disrepair that exceeds the targets set, deteriorating punctuality, low rate of positive responses to traffic requests from railway undertakings). In financial terms, while ART notes that high-speed trains prices remain stable in 2022, the cost of regional express trains remains the highest among our European neighbours.

RAIL INFRASTRUCTURE IS IN A STATE OF DISREPAIR THAT EXCEEDS THE OBJECTIVES SET BY SNCF RÉSEAU

Funding for rail infrastructure remains insufficient to meet the network’s maintenance and investment needs. While the maintenance and upkeep actions of the railway network and the exit of operation of the oldest sections had allowed a significant rejuvenation of the network until 2019, they only allow, between 2021 and 2022, a stabilization of its age, at 28.4 years. However, this is still nearly three years more than SNCF Réseau’s objective of maintaining the average age of infrastructure at half its theoretical lifespan. This is also the case for switches and crossings, due to the amount of investment falling and the low level of modernisation.

SNCF RÉSEAU’S RESPONSE RATES FOR REQUESTS TO RUN TRAINS ARE BELOW ITS PERFORMANCE TARGETS

The rates of positive responses to requests to run trains on the rail network have improved since 2017 but remain below the targets set out in the performance contract signed between the State and SNCF Réseau. These rates are significantly lower for freight and night trains than for other passenger trains, mostly due to works preventing trains from running.

IN 2022, PUNCTUALITY DETERIORATED FOR ALL RAIL SERVICES

For high-speed services, international routes and the high-speed South-East route showed the biggest increases in the rate of passengers late getting off the train in 2022. While the causes of delays are a shared responsibility between railway companies (14 % of delays are due to train-related faults) and infrastructure managers (delays largely associated with infrastructure faults), regional express public service obligation (PSO) train services are marked by high rates of "last minute" cancellations. These cancellations particularly affected the Hauts-de-France region in 2022, whose causes lie in the organisation of the railway company operating the service.

HIGH-SPEED TRAIN PRICES REMAINED RELATIVELY STABLE IN 2022

In 2022, despite record passenger numbers and occupancy rates for all high-speed services in France, prices remained relatively stable on average overall, leading to a change in operators' revenue per train.km below inflation.

On average, however, prices have fallen sharply on the high-speed South-East route, where there has been competition since 2022 between the incumbent operator SNCF Voyageurs, its subsidiary Ouigo and the Italian operator Trenitalia.

IN 2022, THE COST OF OPERATING REGIONAL EXPRESS TRAINS SERVICES REMAINS HIGHER IN FRANCE THAN IN NEIGHBOURING EUROPEAN COUNTRIES

Although high, the cost of operating regional express trains has no impact on the prices paid by users, which appear to be fairly comparable in France to those observed in Germany, Spain and Italy. The regions compensate these operating costs with the State via public subsidies that are much higher than those observed in other countries. The high level of operating costs for PSO services depends largely on the way in which the railway company operating the passenger transport services is organised and managed. Where it has been implemented (Hauts-de-France, Pays de la Loire, Provence-Alpes-Côte d'Azur), the opening up of PSO rail services to competition is already helping to lower operating costs and, as a result, to reduce public subsidies and/or improve rail offer.

For further details (in French):

- [Le marché du transport ferroviaire en France en 2022 – L'Essentiel](#)
- [Le marché du transport ferroviaire en France en 2022 – Le rapport complet](#)
- Les [tableaux de bord digitalisés](#) sur le marché français du transport ferroviaire de voyageurs et de fret
- Les [jeux de données en open data](#)

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About the French Transport Regulatory Authority (ART)

Since 2010, the French railway sector has had an independent authority to accompany its gradual opening to competition: the Autorité de régulation des activités ferroviaires (Araf). Law 2015-990 of 6 August 2015 on growth, activity and equal economic opportunity extended the regulator's powers to road activities - coach transport and motorways. On 15 October 2015, Araf

became the Autorité de régulation des activités ferroviaires et routières (Arafer), with the mission to contribute to the proper functioning of public service and competitive activities for the benefit of rail and road transport customers.

With competence for the regulation of airport charges since 1 October 2019, Arafer became the Transport Regulatory Authority (ART) on that date. Lastly, Law No. 2019-1428 of 24 December 2019 -mobility act- extended ART's powers and missions to the opening up of mobility and ticketing data, as well as to the regulation of infrastructure manager activities and security activities carried out by RATP in Île-de-France. Its opinions and decisions are adopted by a college of five independent members chosen for their economic, legal or technical skills in the field of digital services or transport, or for their expertise in competition matters. It is chaired since 29 December 2023 by Thierry Guimbaud.