

MARKET MONITORING – STAKEHOLDER SURVEY 2014

2012 stakeholder survey identified key issues relating to the development of competition in the rail services market:

- Transparency of safety and technical requirements
- Content of safety and technical requirements
- Clarity of IGC certification and authorisation processes
- Level of access charges for freight services
- Structure and level of access charges for passenger services

Since that survey - important developments

- Publication of technical rules for rail vehicles;
- Removal of specific safety requirements (second driver, additional running capability for freight locomotives etc.);
- Safety certification of a new passenger operator in June 2013;
- Introduction and subsequent extension of Eurotunnel's ETICA reduction scheme for new freight flows;
- Other reductions to freight charges introduced by Eurotunnel in June 2014;
- IGC's decision of October 2013 on the transparency of Eurotunnel's network statement.

Part A: Tracking developments since the 2012 survey:

Taking each of the five issues raised in 2012:

- How important were they for each organisation?
- Have they got better or worse since the last survey? and
- If there has been a change, what was the impact of that change?

Part B: Non-tariff barriers to market development

Several recent studies into the Channel Tunnel rail market and its potential for development.

Numerous obstacles to growth and competition have been suggested.

Purpose of the survey and this stakeholder conference:

- Establish consensus about what the barriers are and the nature of their effect on market development
- Set some priorities by identifying the most important barriers
- Explore realistic solutions for overcoming them
- Separate sections for passenger and freight markets.