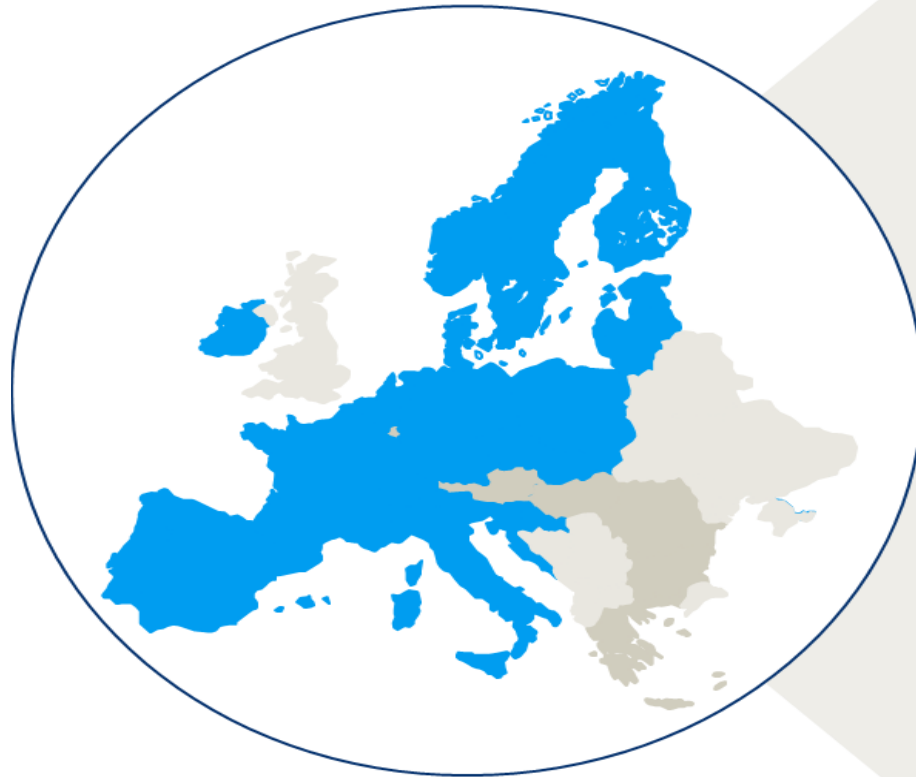


PRIME 25

26th June 2025

KPI's and Benchmarking Subgroup

This year 22 participants contributed with 2023 data to this report, one more than in the previous season



BANER NOR

TRAFIKVERKET
SWEDISH TRANSPORT ADMINISTRATION

LATVIJAS DZELZCEĻŠ

adif

Iarnród Éireann
Irish Rail

Infraestruturas
de Portugal

HŽ INFRASTRUKTURA

BANEDANMARK

SBB CFF FFS

Infrastruktura

Lisea
LIGNE A GRANDE VITESSE SUD EUROPE ATLANTIQUE

ProRail

DB InfraGO

SNCF
RÉSEAU

RFI
RETE FERROVIARIA ITALIANA
GRUPPO FERROVIE DELLO STATO ITALIANE

EESTI RAUDTEE
pidevas liikumises

ŽSR

Väylävirasto
Trafikledsverket

INFRABEL
Right On Track

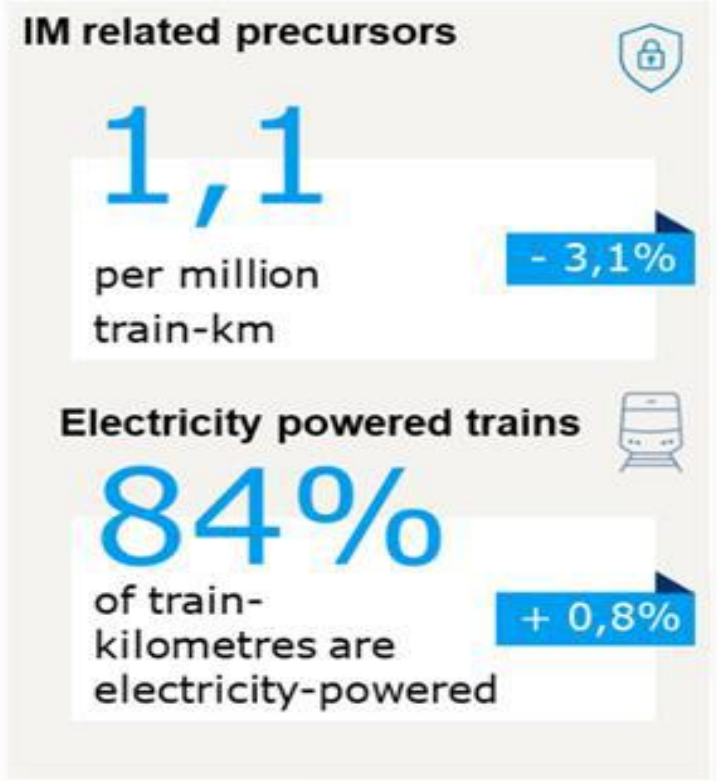
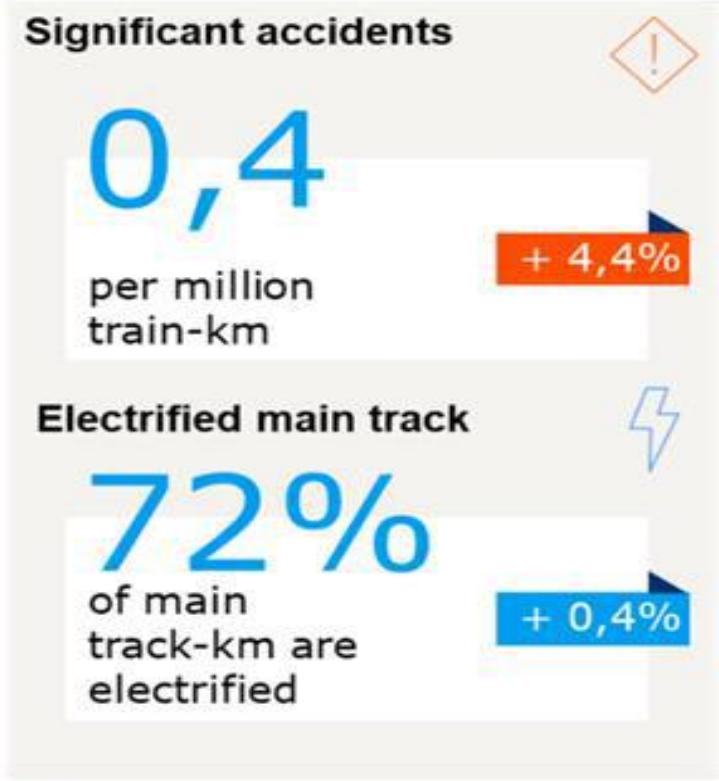
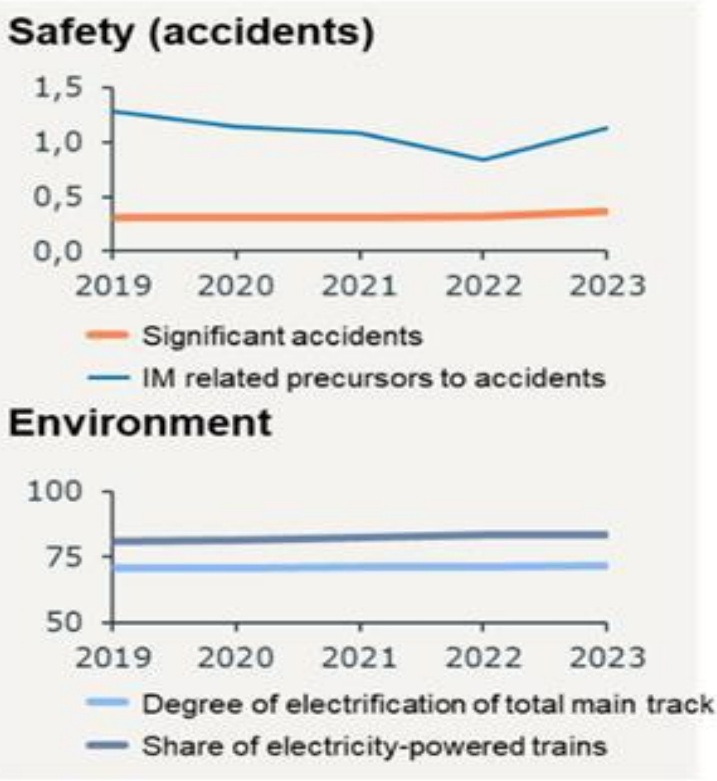
SPRÁVA
ŽELEZNIC

PLK

L'G INFRA

■ Participants in PRIME KPI Report ■ PRIME members

After reaching their lowest level in 2022,
Significant accidents related to infrastructure managers have increased slightly in 2023



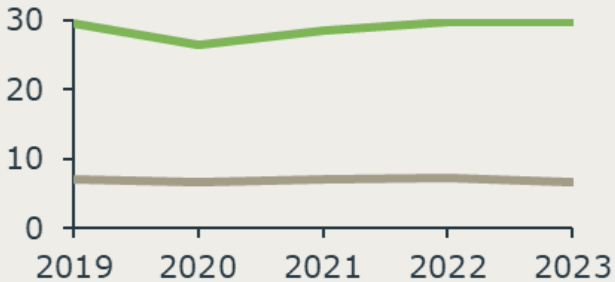
 **Peer group's average, 2023**

CAGR 2019-2023

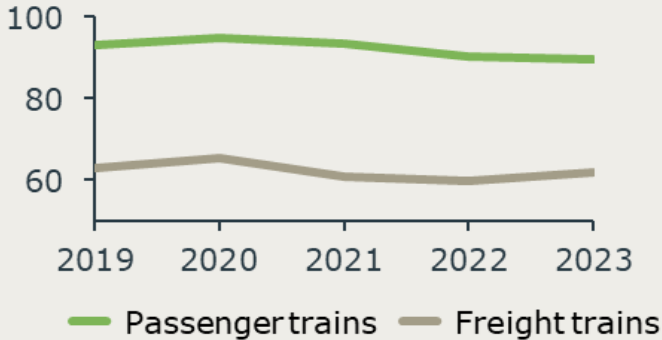
Electrification and the use of green electricity are among the
most crucial steps toward reducing emissions.

Freight rail experienced an average annual decline of 1.4% between 2019 and 2023

Train activity



Train punctuality



Passenger trains



30

passenger trains
per main track-km
per day

+ 0,2%

90%

of passenger
trains on time

- 1,0%

Freight trains



7

freight trains per
main track-km
per day

- 1,4%

62%

of freight trains
on time

- 0,3%



Peer group's average, 2023

CAGR 2019-2023

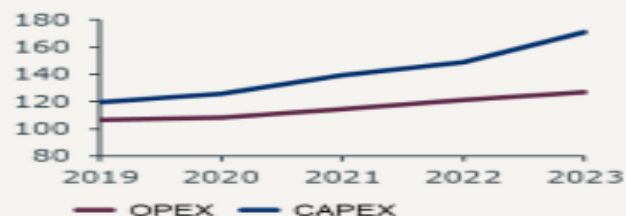
Since Covid Punctuality has been continuously decreasing, with 2023 data indicating a return to pre-pandemic levels and an overall decline over the year.

Expenditures OPEX and CAPEX

A significant external factor is inflation, which can considerably impact costs over time and is beyond the control of the infrastructure manager..

Nominal

Expenditures



OPEX

127.000€

OPEX per
main track-km

+ 4.5%

CAPEX

171.000€

CAPEX per
main track-km

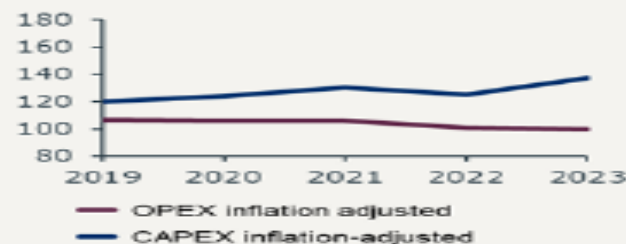
+ 9.4%

Peer group's average, 2023

CAGR 2019-2023

Inflation adjusted

Expenditures – inflation adjusted



OPEX – inflation adjusted (2023 in 2019 price level)

100.000€

OPEX per
main track-km

- 1.7%

CAPEX – inflation adjusted (2023 in 2019 price level)

137.000€

CAPEX per
main track-km

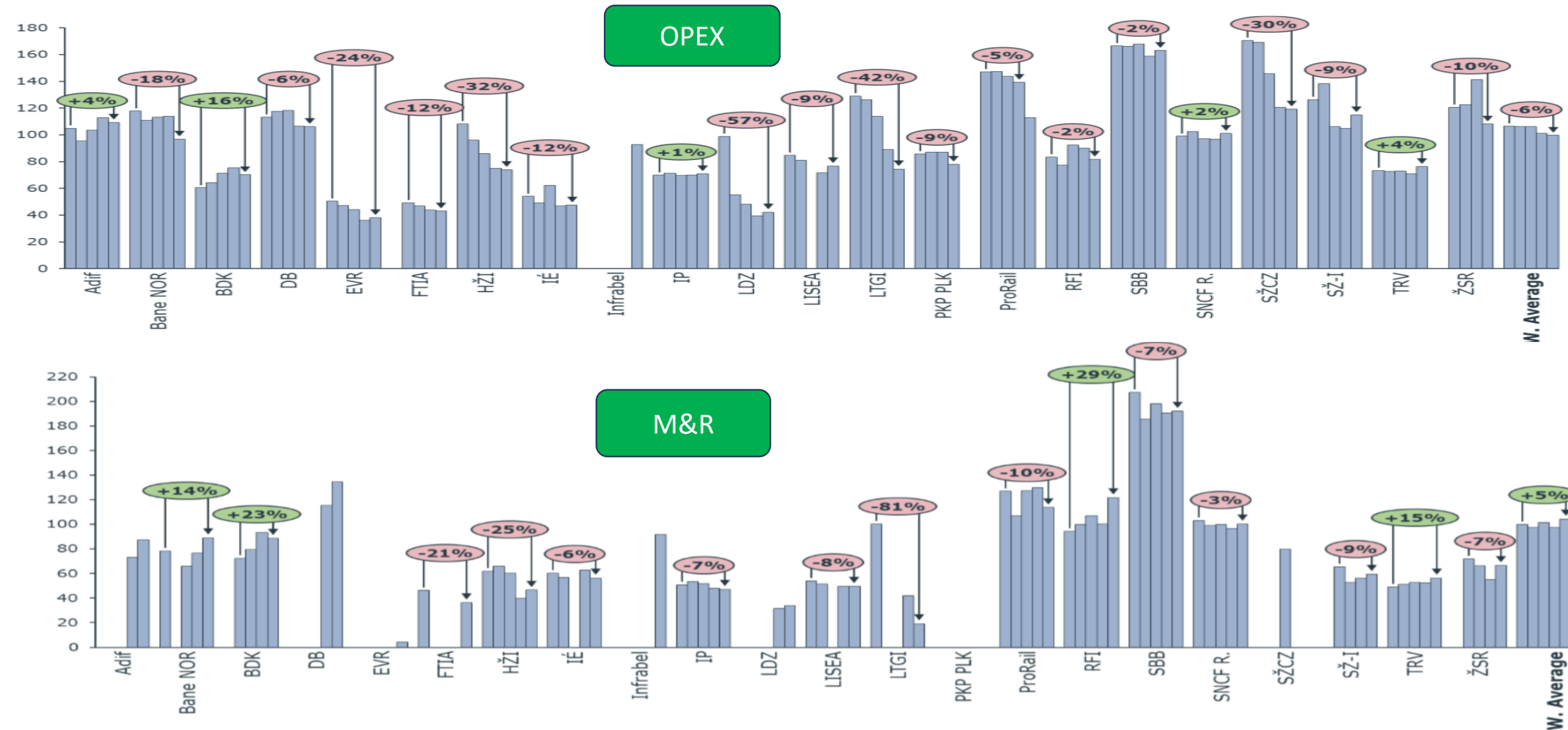
+ 3.4%

Peer group's average, 2023

CAGR 2019-2023

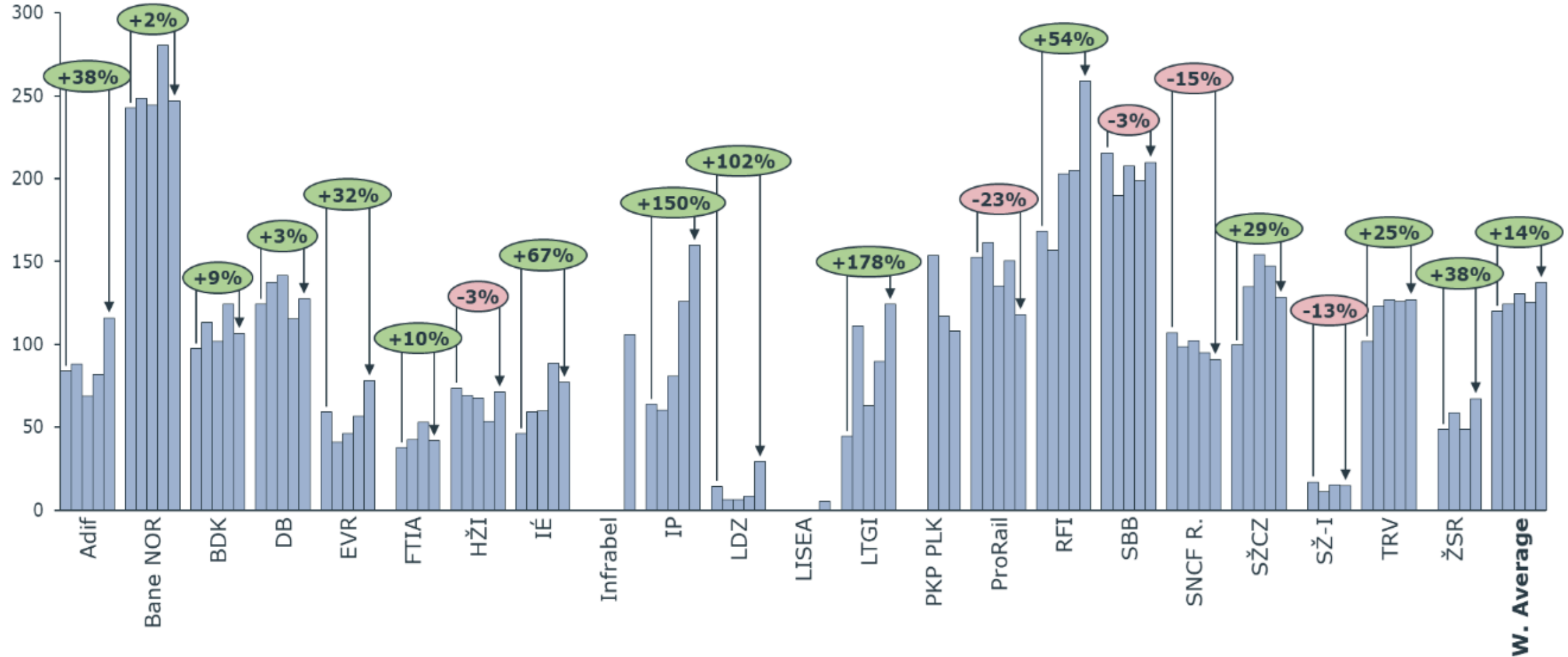
After adjusting for inflation by deflating all years to 2019 price levels, a different picture emerges.

Adjusted for inflation OPEX decreased by 6% and M&R increased by 5% from 2019 to 2023.



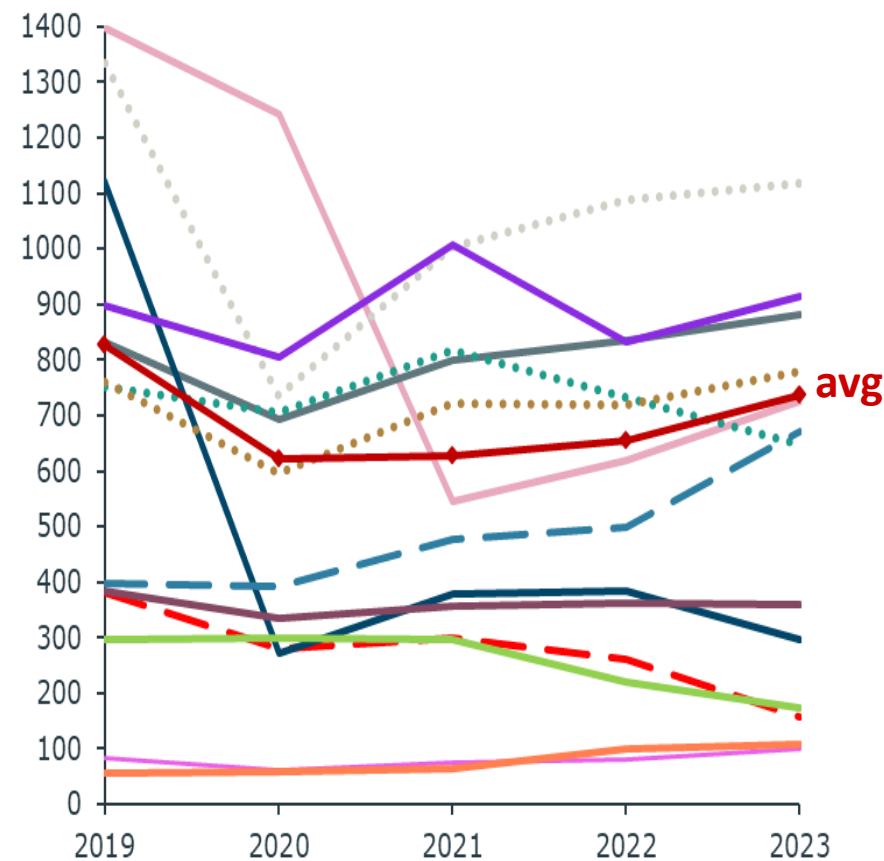
Average capital expenditures increased by 43% from 2019 to 2023.

When adjusted for inflation, the 2023 average was only 14% higher than the 2019 average .

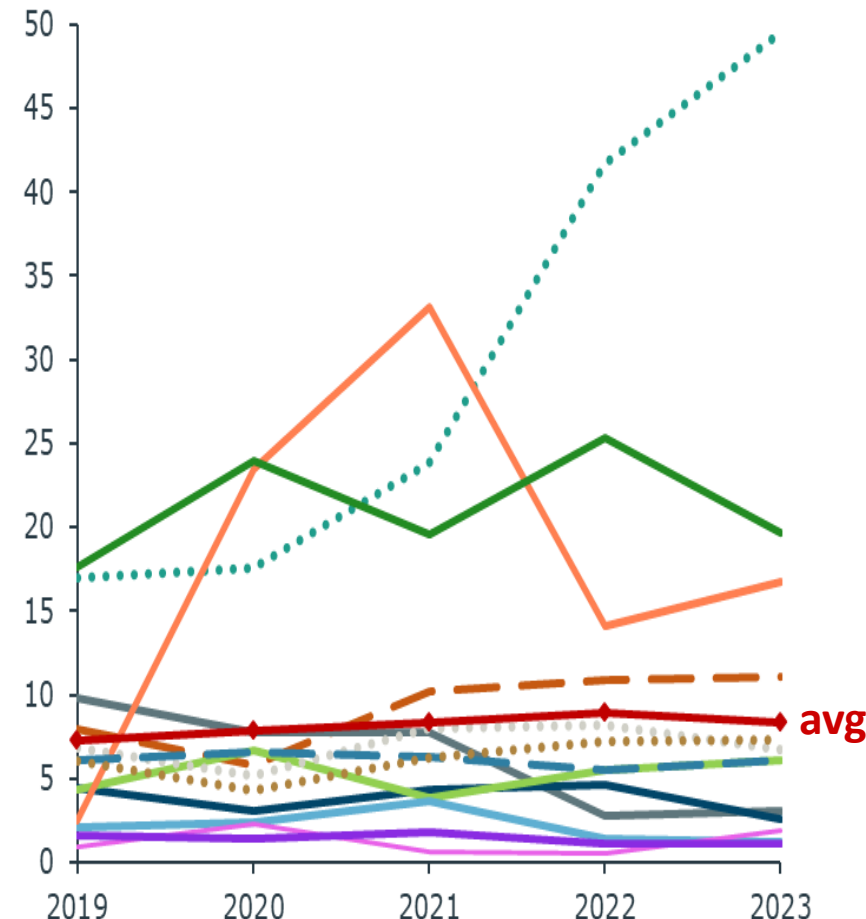


Average Asset Failures dropped since 2019, while Delay Minutes increased since 2019.

Asset Failures per thousand main track-km
- figure 78



Delay Minutes per thousands train-km
- figure 74



Description

- Asset Failures – 2.9%
- Delay Minutes + 3.4%
- Trends differ among IM's. Signalling accounts for most of all asset failures. Track is the second highest failing asset group
- Structural failures often result in high delays but occur infrequently, whereas signalling failures are more frequent but typically cause shorter delays

Insights on cost by Subgroup - Introduction

Besides carrying out the yearly KPI benchmark the subgroup also carries out workshops withing the working group and try to learn from the benchmark results. Also trying figuring out what are figures telling us.

In March the subgroup conducted a workshop titled: “**Insights on cost drivers in rail infrastructure**”.

First topic at the workshop was to find causes for cost increase over past years. The subgroup found three key areas for cost increase, namely:

1. Inflation
2. Enhancements to maintain status-quo of service commitment
3. Activity increase

Second topic at the workshop was to find ways to increase efficiencies and lack of funding.

The observed and discussed cost increases are fuelled by three simultaneously occurring dynamics

Inflation

1

Rising costs due to rising prices

- Shortages in energy, material and labour
- Bottlenecks in the supplier market
- Instable supply-chains
- Heightened negotiation power of suppliers (due to time pressure on IM side, narrow supply market, ..)

Enhancements to maintain status-quo of service commitment

2

Activities needed to ensure that service obligation is maintained

- Increase climate resilience (reactive and preventive)
- Reduce backlog and ensure that network condition and security (?) thresholds/requirements are met
- Increasing obsolescence costs of older systems (with parallel investment in new systems)

Activity increase

3

Activities which allow the IM to continuously improve and expand their service offering

- Electrification of track
- Extension of high-speed network
- Extension of network for capacity increase
- Investment in standardisation and interoperability



IM face the challenge of operating in an increasingly complex environment and under increasingly tense external conditions while continuously extending their service offerings

Workshop outcome on Efficiencies and IM Measures

- ① The competition with other modes of transport creates substitution competition and thus also efficiency pressure on IMs. Measuring performance efficiency is a complex endeavour, without single measures available. There is no homogenous way of looking at efficiency.
- ② Digitalisation, especially data modelling and predictive activities, present a big potential for efficiencies and more informed decision making
- ③ IM can take internal measures to increase efficiency (process optimisation, restructuring, standardisation etc.) or external measures (running more trains for increased TAC, securing additional funding)
- ④ Standardisation is key for interoperability. However, it takes long and is costly to achieve standardisation.
- ⑤ With increasing budgetary constraints, IM also think about measures which result in a service reduction, such as reduced punctuality, reduced frequency or the closing of lines. For some areas road can be more cost effective than rail.
- ⑥ Increasing awareness of the funders (governments) about the challenges faced by rail but also about the benefits it brings is crucial for securing increased and stable funding and allowing IM to operate with long term efficiencies in view

Initiative to publish the external benchmarking report earlier

- **The KPI and Benchmarking group recommended to publish the KPI report earlier than 18 months after the year end at end of June (at start of summer)**
- **Targeted to publish on 1st May**
- **Draft issued on 1 April - Each IM given 4 weeks to review and approve the Report**
- **This process approved at the Prime Plenary in November**



Thank You