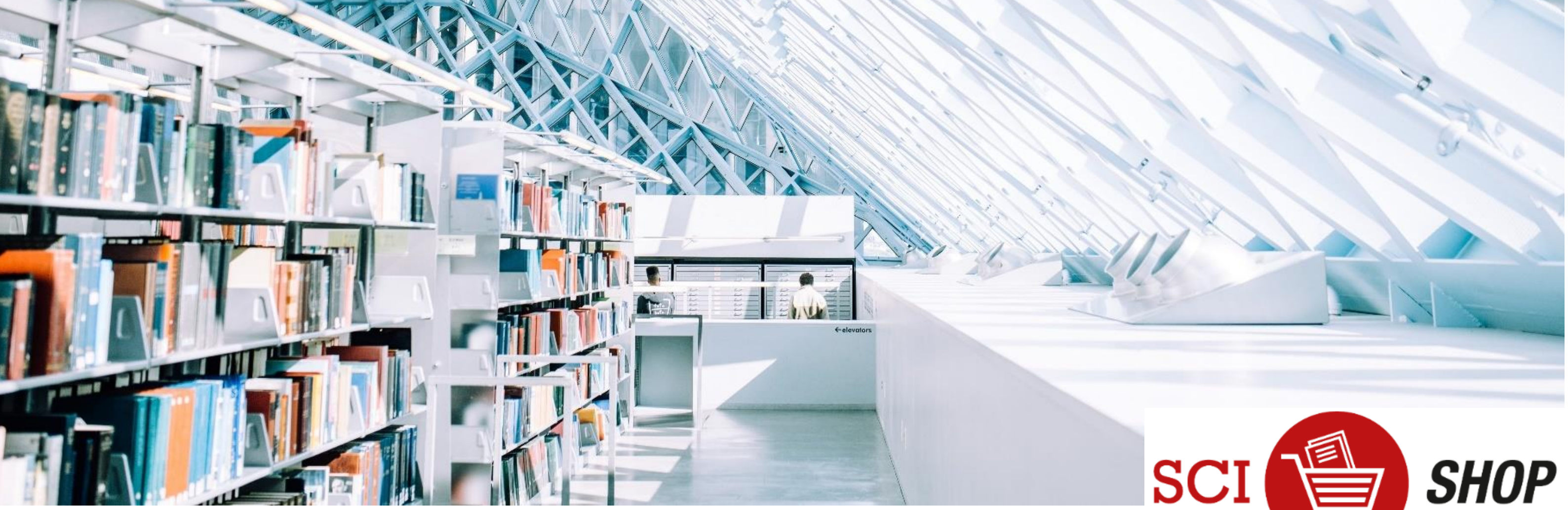
2020


SCI MULTICLIENTSTUDIES

# IMPACT OF THE COVID-19 CRISIS ON THE RAILWAY SECTOR IN EUROPE

## Transport market scenarios and impact on operators, rolling stock owners and the railway industry



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**CONTENT**

# 1 Continental Europe

## 1.1 Overview

| Socio-economic data 2019 |
|---|
| Population (mn) |
| CAGR Population 2018-23 (%) |
| Degree of urbanisation (%) |
| GDP per capita (PPP, USD) |
| GDP (current prices, USD bn) |
| CAGR GDP (real) 2018-23 (%) |
| **Rail infrastructure 2019** |
| Mainline railway network (km) |
| High-speed railway network (km) |
| **Transport market 2019** |
| Transport performance (billion pkm) |
| Average transport distance (km) |
| Rail modal share (%) |
| Share of PSO (%) |
| Share of Open Access (%) |
| **Passenger rail fleet 2019** |
| HST (units) |
| EMU (units) |
| DMU (units) |
| PC |
| E-Loco* |
| D-Loco* |

* only for passenger rail

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## 1.2 Current developments

### 1.2.1 Covid-19 Epidemic

| **Italy – Covid-19 overview** (as of xx.04.2020) |
|---|
| Confirmed |
| Confirmed per 10,000 people |
| Deaths |
| Recovered |

Source: John Hopkins University © SCI Verkehr
Figure 1: Continental Europe: Covid-19 overview

In January 2020, individual cases of corona infections occurred in some European countries. The first cases were discovered on 24th January in France followed by Germany and Italy. XXX

Countries in Continental Europe started to reintroduce border controls after Corona cases in Italy and Germany rose quickly. In the beginning, citizen from high-risk countries were not allowed to cross borders to countries which implemented travel restrictions. XXX

### 1.2.2 Transport performance

XXX

**Development transport performance of operators**

| Operator | Development Q1 2020 |
|---|---|
| | – |
| | – |
| | – |
| | – |
| | – |
| | – |

Source: Company reports © SCI Verkehr

Figure 2: Continental Europe: Development transport performance of operators

## 1.3 Development of transport performance

### 1.3.1 „Pre Corona“-Forecast

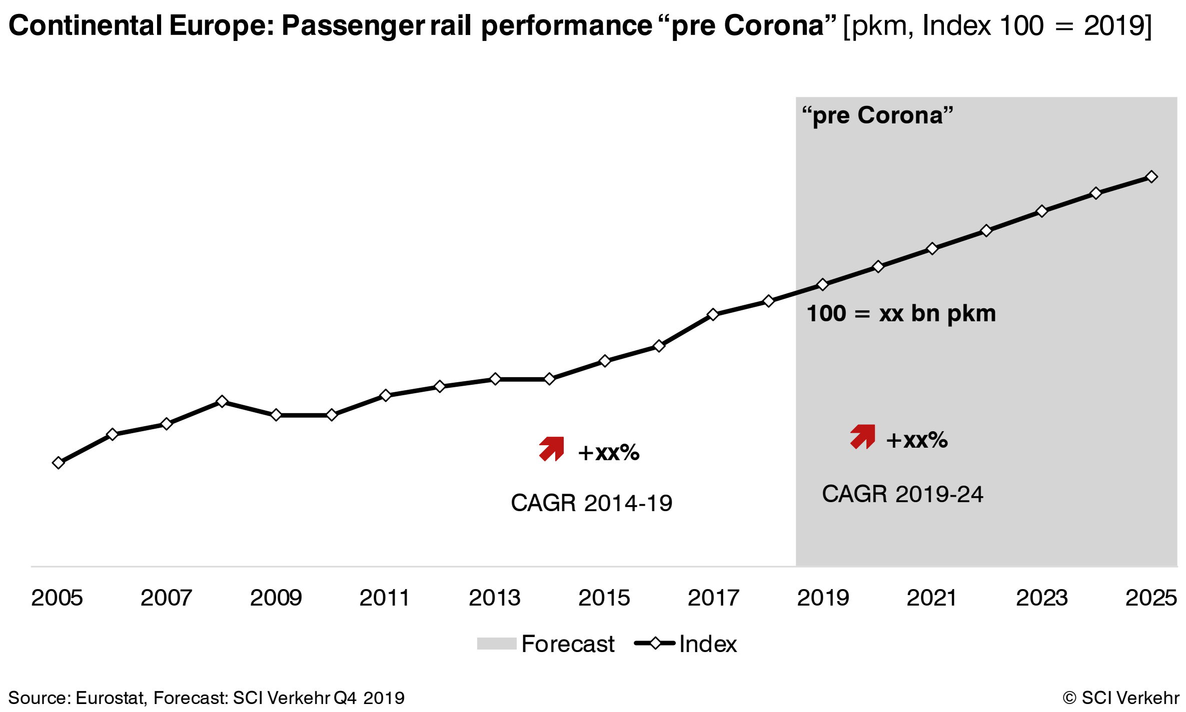



Figure 3: Continental Europe: Transport performance "pre Corona"

Continental Europe accounts for ~10% of the worldwide rail passenger performance and ranks second behind Asia. Germany and France are the largest markets and account for nearly half of the region's performance. XXX

## Main drivers of transport performance

| Drivers | Brief description | Relevance | Trend |
|---|---|---|---|
| Infrastructure | – | ▪▮▮▯ | ➚ |
| Competition | – | ▪▮▮▯ | ➚ |
| XXX | – | ▪▮▮▯ | ➚ |

Relevance for transport performance: ▪▮▮▮ = very high, ▪▮▮▯ = high, ▪▮▯▯ = medium, ▪▯▯▯ = low, ▫▯▯▯ = none
5-year trend: ↑ = strongly increasing, ➚ = increasing, → = constant, ➘ = decreasing ↓ = strongly decreasing

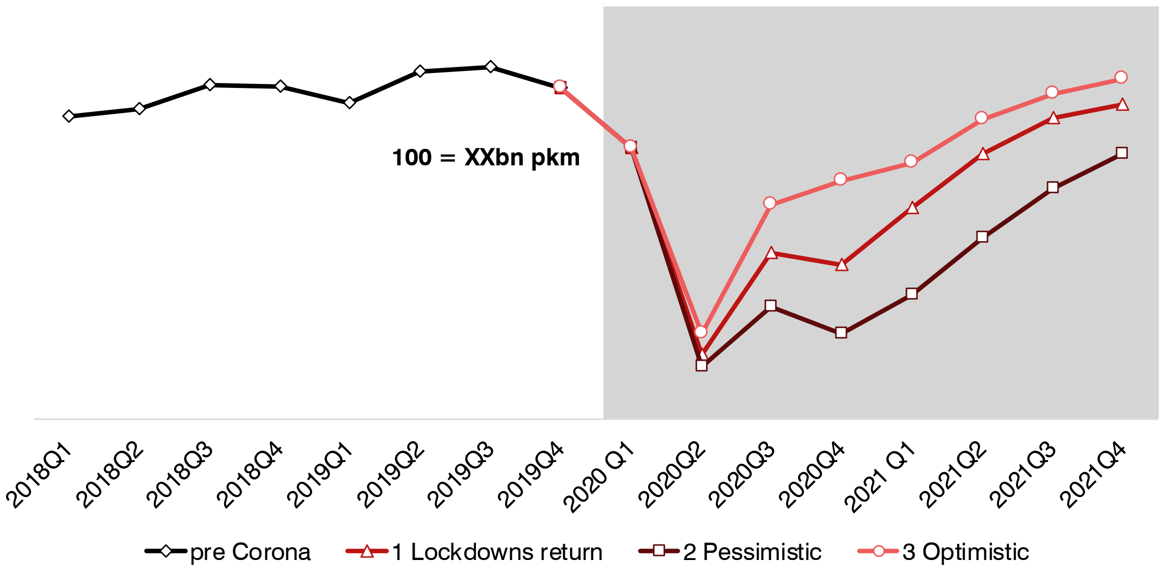


Figure 4: Continental Europe: Main drivers of transport performance "pre Corona"

### 1.3.2 Scenarios

The corona pandemic will lead to an unprecedented decline in the passenger transport market in Continental Europe in 2020. In March and April, almost all countries introduced contact restrictions and curfews, as a result of which transport performance slumped by 40% (Sweden) to 90% (France, Italy). XXX

**Continental Europe: Passenger rail performance per quarter scenarios**
[pkm, Index 100 = Q4 2019]




Source: Eurostat, Scenarios: SCI Verkehr



| **Transport performance Continental Europe** [million Pkm] | | | | | | | |
|---|---|---|---|---|---|---|---|
| **Year** | **2019** | **2020** | **2021** | **2022** | **2023** | **2024** | **2025** |
| Pre Corona | | | | | | | |
| 1 Lockdowns return | | | | | | | |
| 2 Pessimistic | | | | | | | |
| 3 Optimistic | | | | | | | |

Figure 5: Transport performance Continental Europe scenarios

For the short-term developments until the end of 2021, the main driver is the development of the pandemic and as a result of the contact restrictions. XXX

### Main drivers of transport performance

| Drivers | Pre Corona | 1 Lockdowns return | 2 Pessimistic | 3 Optimistic | Relevance |
|---|---|---|---|---|---|
| Contact restrictions | | | | | |
| Mobility behaviour | | | | | |
| XXX | | | | | |

Relevance for transport performance: = very high, = high, = medium, = low, = none



Figure 6: Continental Europe: Main drivers of transport performance scenarios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