

## A global perspective on positioning European railways

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At WCRR2006 in Montréal, the writer presented factors extracted from a global comparison of railways<sup>1</sup>. Two of them offer essential insight into railway positioning.

The first, *Societal Orientation*, reflecting a popular positioning, rests on high-speed, high-tech, intense railway application: It evokes the Western European passenger-dominated archetype, with railways also conveying some freight traffic. The second, *Territorial Orientation*, reflecting a line-haul freight positioning, rests on liberal competition among technologically-aware railways with strong private participation: It evokes the competitive North American archetype, with long, heavy trains conveying bulk commodities or high-value goods over long distances.

Noting that factors are mutually exclusive, they explain passenger railway sustainability in populous though small countries, such as Japan; freight railway sustainability in extensive though relatively less populous countries, such as in North America; and unsustainability of freight- and passenger railways in countries that are neither populous nor extensive, such as New Zealand.

As globalization advances, jealously nurtured national railway franchises in Europe now confront enormous challenges as well as rich opportunities. Renowned for high-speed passenger rail, Europe's freight rail market share is distressing.

Air travel caps passenger rail potential at journeys of  $\pm 1000$ km. Setting aside bulk commodities, whose short, heavy hauls arguably have limited potential in Europe, heavy intermodal trains of double-stacked containers are demonstrably competitive over hauls measured in multiples of 1000km. While Europe's railways have an enviable Societal Orientation, they have evidently not yet embraced a Territorial Orientation.

Positioning fault-lines already divide the railway industry: Strategic high-speed passenger and heavy freight infrastructure parameters (respectively steep gradients with minimal curvature, and easy gradients with moderate curvature) are at odds, not to mention their contending operational- and technical preferences.

As the notion of dedicated freight rail corridors gains credence, the drivers of Territorial Orientation, namely competition on parallel routes, heavy haul technologies, innovative ownership options, and recognition of extended territory, should rise to the top of Europe's railway agenda.

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<sup>1</sup> Van der Meulen, RD & Möller, LC. Railway globalization: Leveraging insight from developed- into developing regions.