



Historical view J.H.M. Urlings, President EFRTC,  
General Meeting, LUXEMBOURG, October 10<sup>th</sup>, 2014)

# Railway Contractors (2003-2014)

# Railway Contractors Market

This presentation on the railway contractors market provides an overview of the changes in the market in: Germany (2003-2014), France (2003-2014) and UK (1996-2014), mainly focused on large equipment.

Germany: the market parties with Renewaltrains and Ballastcleaners have been identified, whereby the acquisitions and changes in management are striking. Huge increase in Heavy Equipment.

France: here the stable market with 2 renewal trains has changed into an open market where acquisitions and newcomers stand out.

UK: privatization in 1996 with 13 and after acquisitions 6 market parties. After the disappearance of Railtrack and the emergence of Network Rail (February 2003), maintenance is back in house with the takeover of 16,000 employees from contractors. In 2007, the 6 renewal contracts were changed into 4 contracts. Network Rail itself has purchased new Renewaltrains and Ballastcleaners and in 2010 has been placed in 1 contract for execution. In 2014 Network Rail launched contracts for the renewal of Switches & Crossings (2 contracts) and Plaine Line (3 contracts).

# Germany 2003

## Heavy Equipment

Wiebe 3\*) 2\*\*)

Schweerbau 1\*)

Spitzke 1\*) 1\*\*)

Heitkamp 2\*) 0,5\*\*)

Koehne 1\*) 0,5\*\*)

Schreck Mieves 2\*)

Leonhard Weiss 3\*\*)

Eichholz

Joseph Hubert 2\*)

Knape

\*) Ballastcleaners (9)

\*\*\*) Renewaltrains (7)



# Germany 2014

## Heavy Equipment

Wiebe 3\*) 4\*\*)3\*\*\*)

Schweerbau 2\*)3\*\*)2\*\*\*)

Spitzke 2\*) 2\*\*)1\*\*\*)

Eiffage Rail 1\*) 1\*\*)

Hering Gleisbau 1\*)

Balfour Beatty 2\*) 1\*\*)

Leonhard Weiss 3\*\*)

Strabag Rail 1\*) 1\*\*)

Joseph Hubert 2\*)2\*\*\*)

Knape

\*) Ballastcleaners (14)

\*\*) Renewaltrains (17)

\*\*\*) Subgrade-improvementtrains (8)

Management  
change last 5 year



Also Certified:

Swietelsky (A) 2\*)3\*\*)1\*\*\*) , Rhomberg Sersa (CH) 2\*)2\*\*)

Scheuchzer (CH) 2\*)2\*\* and Strukton Rail (NL) 1\*) 2\*\*)

# Germany 2014 (other parties with Heavy Equipment)

## Bahnbau Gruppe

Europas größtes Bahnbauunternehmen

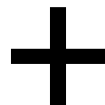
DB Netz with inhouse Bahnbau Gruppe

Bahnbau Gruppe:

5 Renewaltrains

5 Ballastcleaners

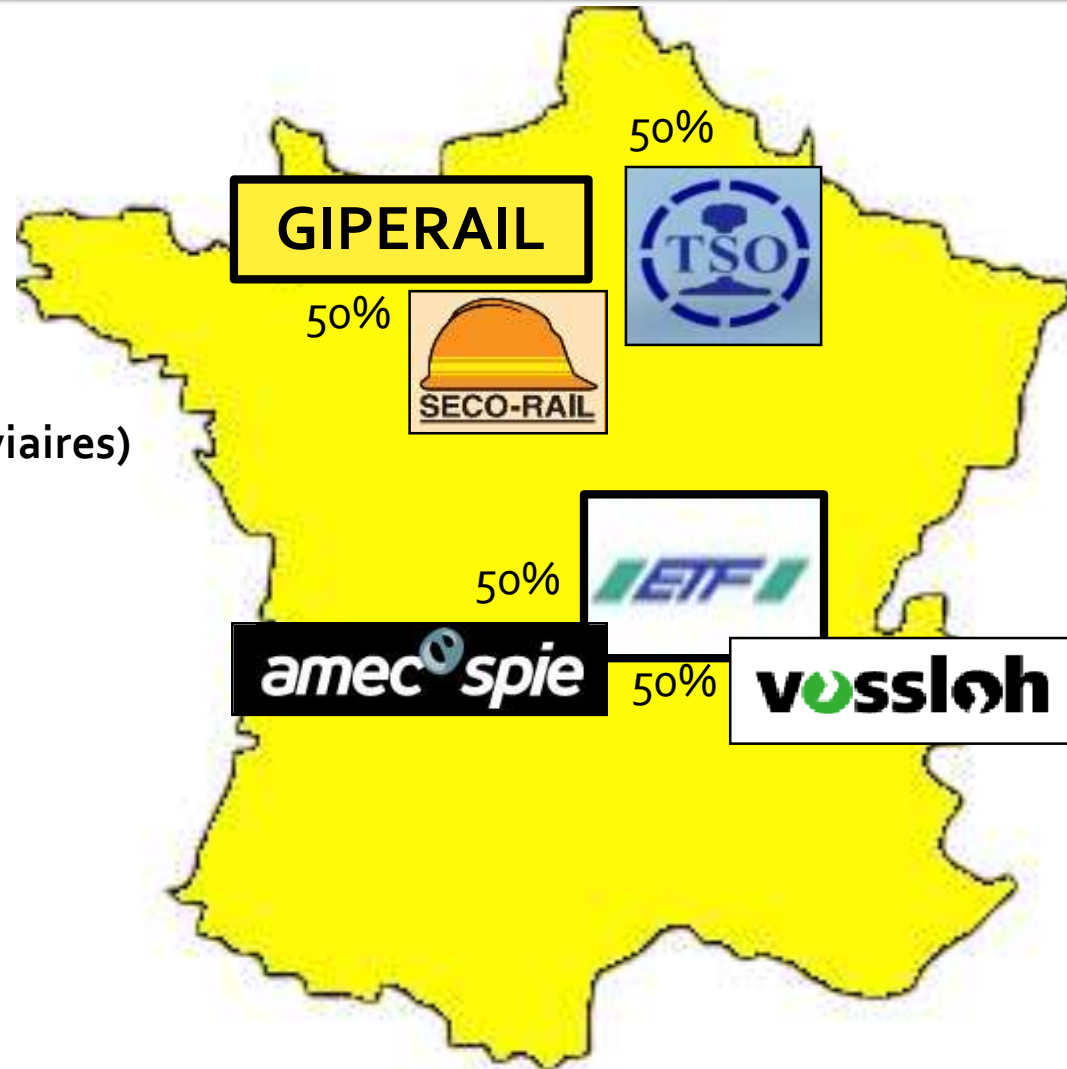
2 Subgrade-improvementtrains



# France 2003, Renewaltrains (2 contracts)

## 1) GIPERAIL

50% TSO / 50% Seco Rail



## 2) ETF (Européenne de Travaux Ferroviaires)

50% AmecSpie / 50% Vossloh

# France 2003, Renewaltrains (2 contracts)

## 1) GIPERAIL

50% TSO / 50% Seco Rail



2000



GIPERAIL

50%



50%



## 2) ETF (Européenne de Travaux Ferroviaires)

50% AmecSpie / 50% Vossloh



2002

amec

2006



2007



50%

amec spie

50%

vossloh



2001



2008



# France 2014, Renewaltrains (3 contracts)

## Lot 1) Transalp Renouvellement



## Lot 2) GIPERAIL

50% TSO / 50% Colas Rail



## Lot 3) Meccoli



**No contracts:**

ETF 1\*) (Eurovia Travaux Ferroviaires)



Eiffage Rail 1\*) 





# UK

# BritishRail → Railtrack

## 1996 Infrastructure Privetised



# RAILTRACK

Privatisation 1996: 6 Renewals & 7 Maintenance Companies

Scotland Track Renewals Company Ltd

Scotland Infrastructure Maintenance Company Ltd

Central Track Renewals Company Ltd

Central Infrastructure Maintenance Company Ltd

Western Track Renewals Company Ltd

Western Infrastructure Maintenance Company Ltd

Eastern Track Renewals Company Ltd

Eastern Infrastructure Maintenance Company Ltd

Northern Track Renewals Company Ltd

Northern Infrastructure Maintenance Company Ltd

Southern Track Renewals Company Ltd

South West Infrastructure Maintenance Company Ltd

South East Infrastructure Maintenance Company Ltd



# UK

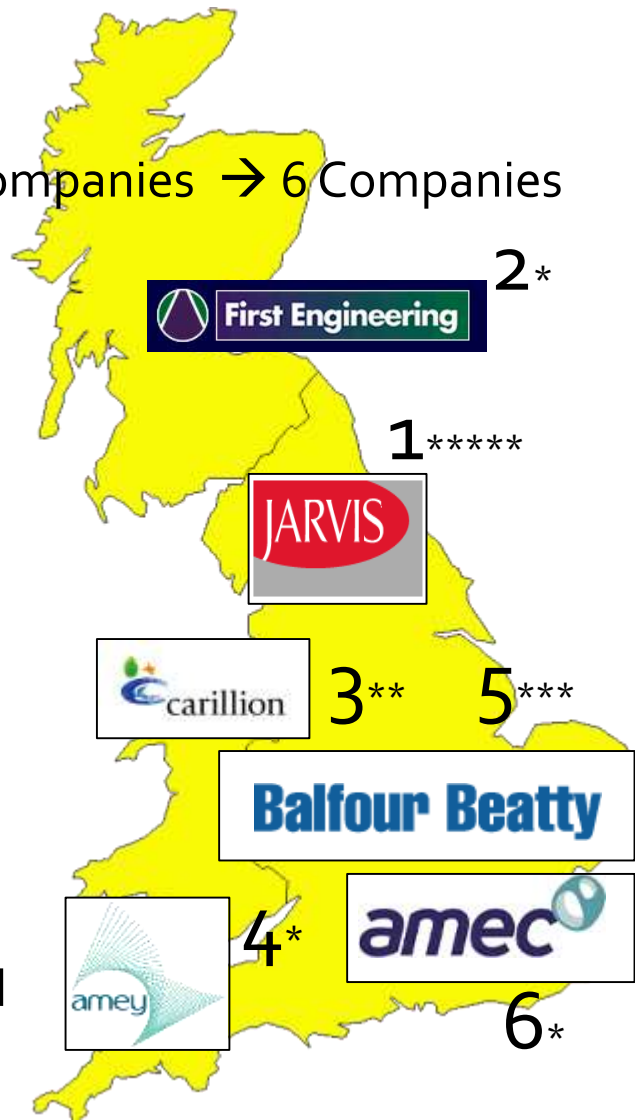
# BritishRail → Railtrack

## 1996 Infrastructure Privetised



Privatisation 1996: 6 Renewals & 7 Maintenance Companies → 6 Companies

- 1) Scotland Track Renewals Company Ltd
- 2) Scotland Infrastructure Maintenance Company Ltd
- 3) Central Track Renewals Company Ltd
- 3) Central Infrastructure Maintenance Company Ltd
- 1) Western Track Renewals Company Ltd
- 4) Western Infrastructure Maintenance Company Ltd
- 1) Eastern Track Renewals Company Ltd
- 5) Eastern Infrastructure Maintenance Company Ltd
- 1) Northern Track Renewals Company Ltd
- 1) Northern Infrastructure Maintenance Company Ltd
- 5) Southern Track Renewals Company Ltd
- 6) South West Infrastructure Maintenance Company Ltd
- 5) South East Infrastructure Maintenance Company Ltd



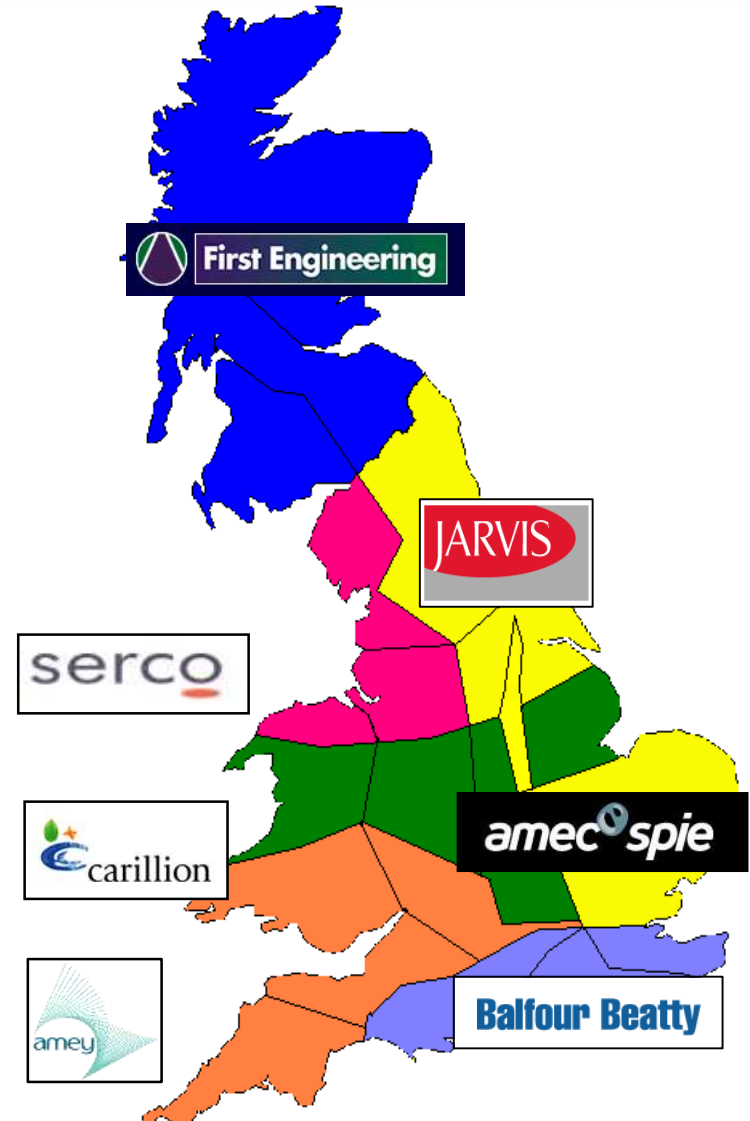
# UK

# Railtrack → Network Rail

(Feb 3<sup>rd</sup>, 2003)



**1:** 2003/2004  
Maintenance  
back-in-house  
18,000 empl.



# UK

# Railtrack → Network Rail

(Feb 3rd, 2003)



1: 2003/2004



Plain Line  
contracts

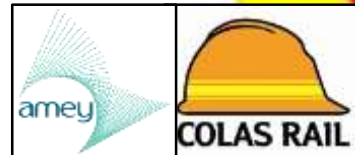
S & C  
contracts



until 2010

2: Medio 2007  
Renewals

6 contractors to  
4 contractors



3: High Output 2010

First/Swietelsky → Amey/Colas



# UK

# Network Rail

(April 29<sup>th</sup>, 2014)



## S&C, 2 contracts:

Amey Sersa – North Alliance (Scotland, LNE/EM and LNW N);

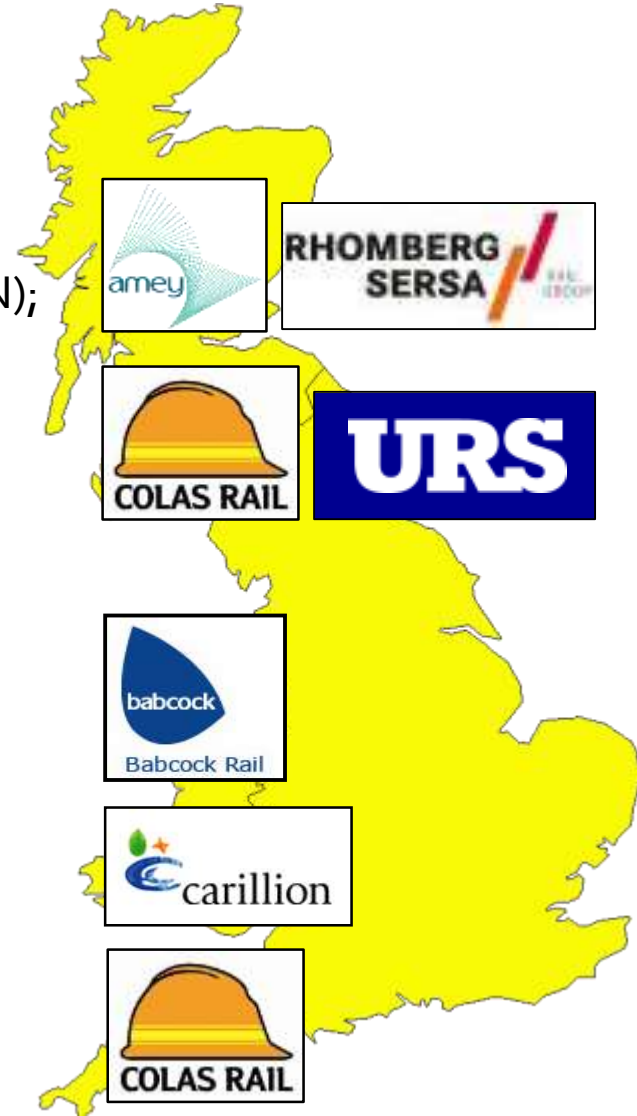
Colas URS – South Alliance (Anglia, Kent/Sussex, Wessex, Western, Wales and LNW S)

## Plain Line, 3 contracts:

Babcock – Scotland, Wales, Western, Wessex and LNW S;

Carillion – LNE/EM and LNW N;

Colas – Anglia and Kent/Sussex



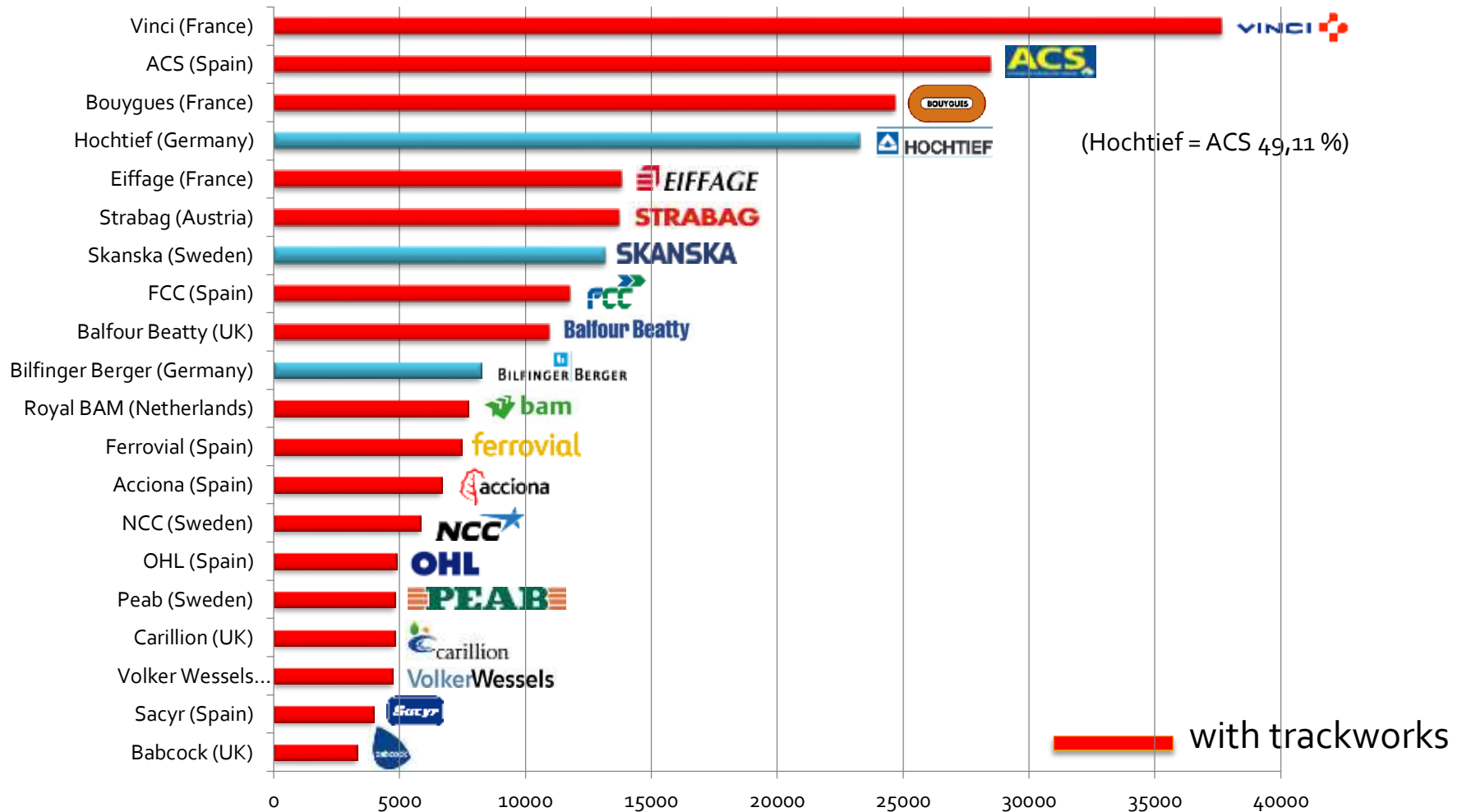
# Railway Contractors Market

---

The following overview shows the 20 largest European construction companies with their annual turnover for 2012. It has been indicated whether these construction companies have a proportional presence in the railway construction market.

The last sheet shows the remaining construction companies (European top 21-150) with railway construction activities.

# Ranking EU consortia (2012, sales in € 1 mio)



# Ranking EU consortia (2012, sales in € 1 mio)

rest 21 --- 150

