

## **The CNMC Reports on the Draft Regulation of ADIF and ADIF Alta Velocidad Charges**

- Railway charges are the fees that railway companies must pay to Adif and Adif Alta Velocidad (Adif High Speed) for using their infrastructures (tracks, stations, etc.).
- The CNMC's methodology has allowed for a 40% reduction in the tariff (direct costs) of the charge, bringing it closer to that of other European countries.
- On the Madrid-Levante high-speed corridor, the charge should be kept at the current level.
- Surcharges for cross-network services (over 700 km in distance that do not stop in Madrid) should be reduced by 27%.

**Madrid, 26 May 2025.** The Spanish National Markets and Competition Commission (CNMC) has issued its report on Adif and Adif Alta Velocidad's Draft Regulation on Railway Charges ([STP/DTSP/071/24](#)).

Railway charges are fees that passenger transport companies—such as Renfe, Ouigo and Iryo—and freight transport companies must pay to Adif and Adif AV—the infrastructure managers in Spain—for using their infrastructures.

They are one of the most significant cost items for these companies and must be predictable to encourage long-term investment in the sector.

### **Composition of the charges**

The charges consist of two parts:

The tariff reflects the direct costs of the infrastructure, i.e. the costs that vary with traffic and must always be passed on to the railway companies.

The surcharges are used to recover the remaining costs of the infrastructure managers but can only be passed on if the market can bear them.

### **40% reduction**

In [Communication 1/2024](#), the CNMC published criteria for monitoring the surcharges([press release](#)). Their application has reduced the tariff by 40%, bringing it much closer to that of other European countries.

This reduction particularly favours variable-gauge services, which operate mostly on the conventional gauge network and have longer journey times, such as Madrid-Pamplona, the Barcelona-Valencia/Alicante or the San Sebastian-

Barcelona. The charges for these services are reduced by nearly half, which will help lower their prices and make rail travel more competitive.

### **Surcharge structure**

The surcharge for high-speed services will now be charged per train.km instead of per seat.km, which benefits larger trains or those running in double formation.

In any case, larger trains (over 600 seats) will pay 50% more per train.km in surcharge than medium-sized trains (300 to 600 seats), due to their greater ability to absorb costs.

And smaller trains, with less than 300 seats, will pay 30% less, as some routes have lower demand or serve passenger segments that require higher frequencies. In addition, operators have small rolling stock pending amortisation.

### **Surcharges by corridor**

Communication 1/2024 requires that surcharges allow an efficient operator to offer services that meet optimal demand in different market segments in a viable and profitable manner.

After applying the test, the CNMC concludes that the market can support the surcharge proposed by Adif AV on the Madrid-Barcelona and Southern corridors. In the latter, the third operator (Ouigo) entered the market in January, so it is too early to assess the full market impact. Its cost-effectiveness will be re-evaluated in the next annual review of the charges.

In the Levante corridor, the market cannot absorb the nearly 13% increase in the charge proposed by Adif AV. For this reason, the current fee must remain unchanged. Even an efficient operator would make a loss on this route, due to the high supply—seats.km have been multiplied by 2.5 between 2019 and 2024—and the lower utilisation of trains—around 70%, when on other corridors it is above 80%.

The surcharge proposed for cross-network services, i.e. those covering more than 700 km and not stopping in Madrid (Barcelona-Seville/Málaga, Barcelona-Granada and Valencia-Seville) must be reduced by 27% to ensure that rail is competitive with air travel.

### **Application of the new charges**

The new charges must be applied from the start of the current service timetable, or compensatory mechanisms must be put in place to ensure that the collection

of charges does not exceed the equivalent of the application of the new charges over the entire service timetable.

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- [Press release](#) (07/02/2025): Adif must approve railway charges at least one year before they go into force
- [Press release](#) (02/04/2024): The CNMC approves the criteria for supervising railway charges
- [Press release](#) (24/01/2024): The CNMC analyses the Draft Regulation on Adif's and Adif AV's railway charges for 2024