11 RAIL FREIGHT CORRIDORS 2024 JOINT TRANSPORT MARKET STUDY UPDATE

11 RFCs Joint TMS survey - 2023

JANUARY 2024

11 RFCs Joint TMS survey - 2023
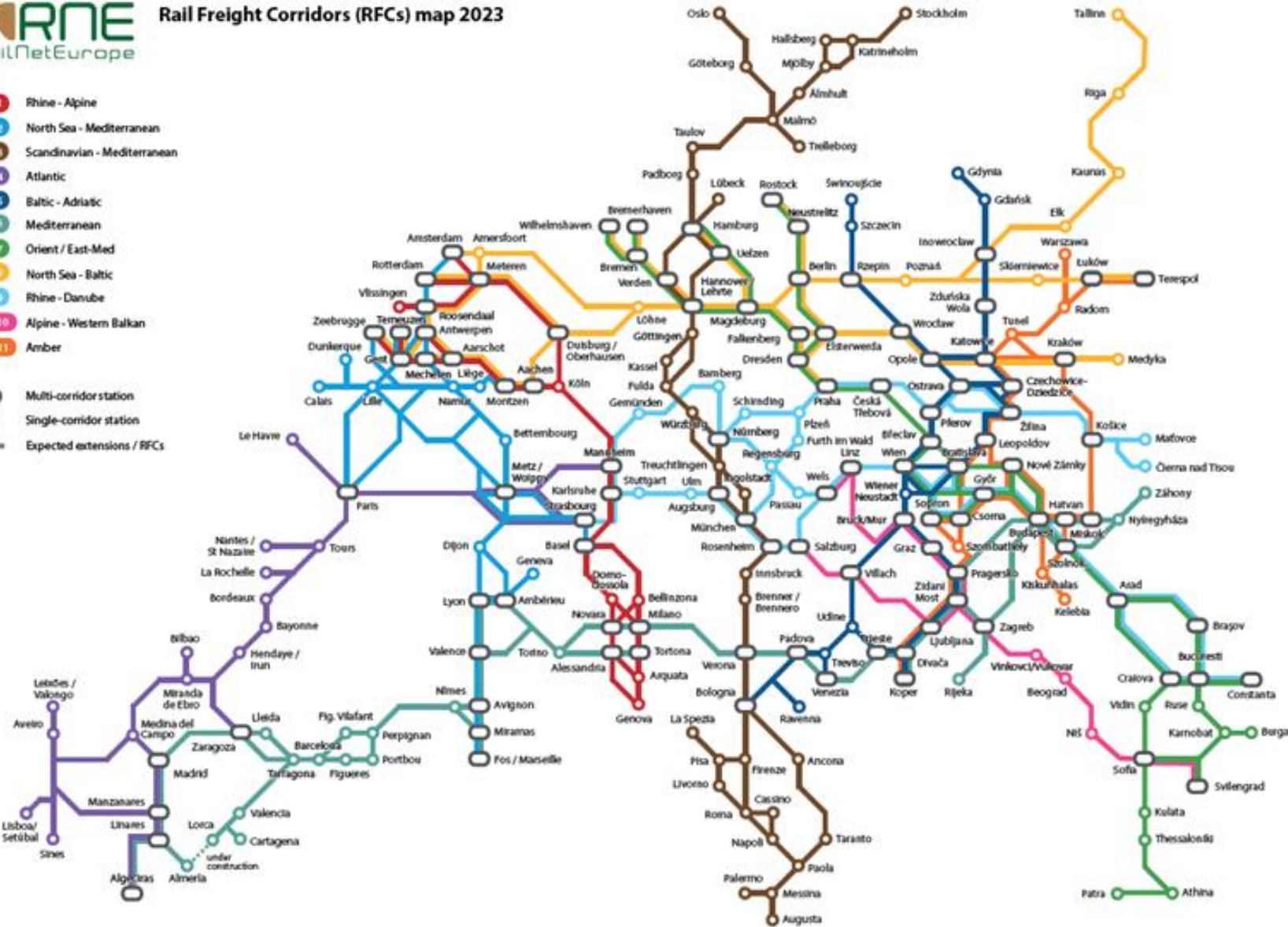
BACKGROUND

11 RFCs Network - 2023

Set up in accordance with Regulation (EU) 913/2010 establishing Rail Freight Corridors (RFCs) across the European Union's Member States, 11 Rail Freight Corridors are currently operational, which represent the key arteries of the European Rail Network for Competitive Freight, interconnecting the main European logistics nodes.

11 RFCs Joint TMS survey - 2023

According to Regulation (EU) 913/2010, the Management Boards of the RFCs perform studies and analyses to improve the competitiveness of freight transport by railway between and across the corridor Member States. Under the coordination of RailNetEurope, the Management Boards of the 11 RFCs decided to execute a Joint TMS Update to be finalized by end of 2024. RNE has commissioned the task to a Consortium consisting of the companies Tplan and Panteia. The study started in June 2023.

As part of the study, a survey (2023 11 RFCs Joint TMS Update Survey) has been undertaken with the purpose of collecting relevant information on the past and future short-term market trends concerning international rail freight transport in Europe and assessing past and expected changes potentially associated with the establishment of the 11 RFCs. A questionnaire has been prepared in this regard to be submitted to the Members of the Railway Advisory Groups and Terminal Advisory Groups of the 11 RFCs.

By participating in the survey, stakeholders have had the opportunity to integrate their specific views and inputs in the further development and planning of the RFCs, also considering the foreseen termination of the operation of the 11 RFCs by December 2029, according to the Proposal for a Regulation of the European Parliament and of the Council on the use of railway infrastructure capacity in the single European railway area, amending Directive 2012/34/EU and repealing Regulation (EU) No 913/2010.

This report summarises the outcome of the *11 RFCs Joint TMS survey - 2023*, which was submitted online, through the EUSurvey platform of the European Commission, between September 2023 and January 2024. The presentation of the results generally follows the structure of the survey questionnaire, which is available upon request. Where applicable, questions codes are reported at the bottom of the slides.

Respondents

11RFCS JOINT TMS SURVEY - 2023

42 questionnaires from railway undertakings

BDZ Cargo	Hupac Intermodal SA	PKP Cargo International HU ZRT.
BLS Cargo AG	Medway	Rail Cargo Austria AG
Captrain España SAU	Mercitalia Rail	Rail Cargo Carrier Croatia d.o.o.
Cargo Trans Vagon	Metrans	Rail Cargo Carrier Slovenia
ČD Cargo	METRANS /Danubia/,a.s.	Rail Cargo Hungaria Zrt.
CD Cargo Hunagry Kft	METRANS Rail (Deutschland) GmbH	Renfe Mercancías
DB Cargo AG	METRANS Rail s.r.o.	Srbija Kargo a.d.
Deutsche Bahn Cargo Romania	METRANS Rail sp. z o.o.	T3M
ENNA Transport	ORLEN Unipetrol Doprava, s.r.o.	Takargo
FRET SNCF	Pimk Rail PLC	Transagent Rail d.o.o.
GLOBAL NEOLOGISTICS DOO	Piraeus Europe Asia Rail Logistics	Tx Logistik Transalpine Branch Italy
GYSEV Cargo Zrt.	PKP Cargo International a.s.	ZSSK Cargo

One respondent did not provide details on his company; some of them belong to a same entity

Tplan

30 questionnaires from terminal operators/port authorities

GENOA PORT AUTHORITY	**LUGO TERMINAL SPA**	**RAVENNA PORT AUTHORITY**
BANE NOR	**PORT OF KOPER**	**RIJEKA PORT AUTHORITY**
BARCELONA PORT AUTHORITY	**LYON TERMINAL**	**ROTTERDAM PORT AUTHORITY**
BCT-BALTIC CONTAINER TERMINAL, LTD.	**METRANS**	**PORT OF STRASBOURG**
CFL TERMINALS S.A.	**NÄSSJÖ KOMBITERMINAL AB**	**RAILPORT ARAD SRL.**
CLIP TERMINALS SP. Z O.O.	**VENICE PORT AUTHORITY**	**SLOVENSKE ŽELEZNICE, D.O.O.**
CONTAINER TERMINAL SALZBURG GMBH	**PIMK RAIL PLC**	**SWEDISH INTERNATIONAL FREIGHT ASSOCIATION (SIFA)**
DUISBURGER HAFEN AG	**TARRAGONA PORT AUTHORITY**	**SZCZECIN AND SWINOUJSCIE SEAPORTS AUTHORITY S.A.**
INTERPORTO BOLOGNA SPA	**TRIESTE AND MONFALCONE PORT AUTHORITY**	**TERMINALI ITALIA SRL**
INTERPORTO QUADRANTE EUROPA VERONA CONSORIO ZAI	**TARANTO PORT AUTHORITY**	**TRELLEBORGS HAMN AB**

Belonging of company/entity to a group/network both operating railway services and managing/operating terminals

RAILWAY UNDERTAKINGS
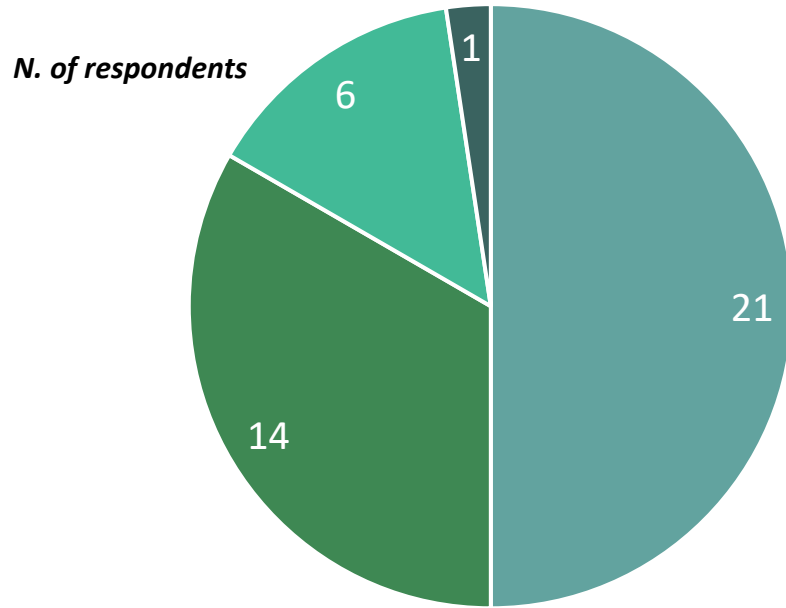
N. of respondents

- Yes, both railway services inside & outside terminals and terminals
- No, only operating railway services outside terminals
- Yes, both railway services inside terminals and terminals
- No, only operating railway services inside terminals

TERMINALS*
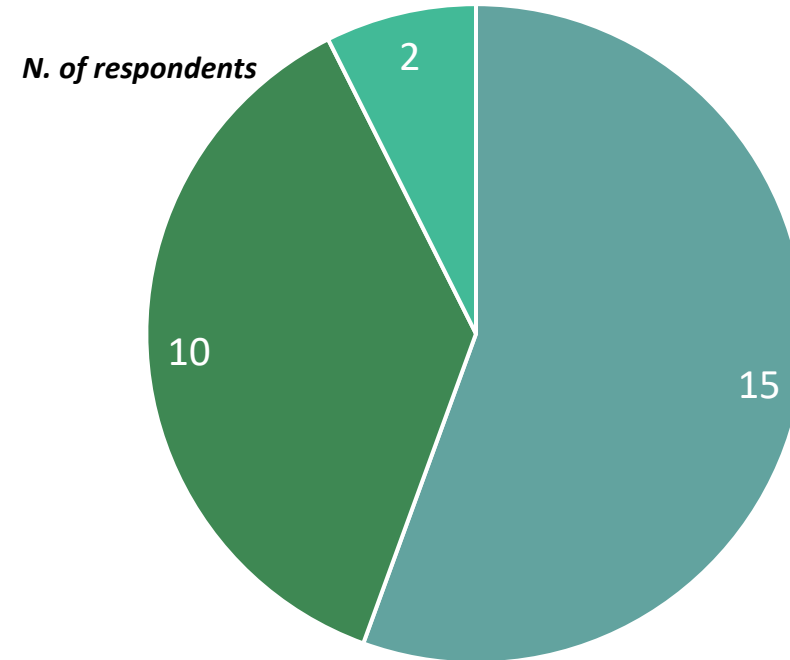
N. of respondents

- No, only managing/operating terminals
- Yes, both railway services inside & outside terminals and terminals
- Yes, both railway services inside terminals and terminals

*27 out of 30 respondents

Tplan

Belonging of company/entity to a group/network operating services in more transport modes

RAILWAY UNDERTAKINGS*

N. of respondents

Yes, through partnerships, 4

Yes, directly or through subsidiaries, 13

No, only railway transport, 24

41 out of 42 respondents

TERMINALS**

N. of respondents

Yes, through partnerships, 1

No, only railway transport, 8

Yes, directly or through subsidiaries, 14
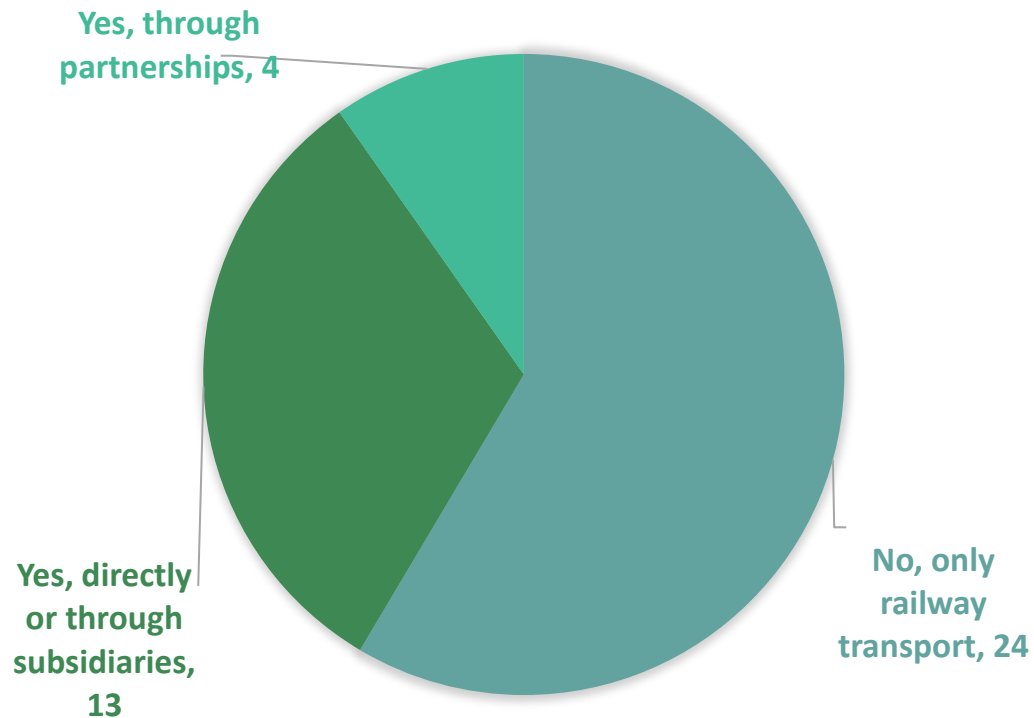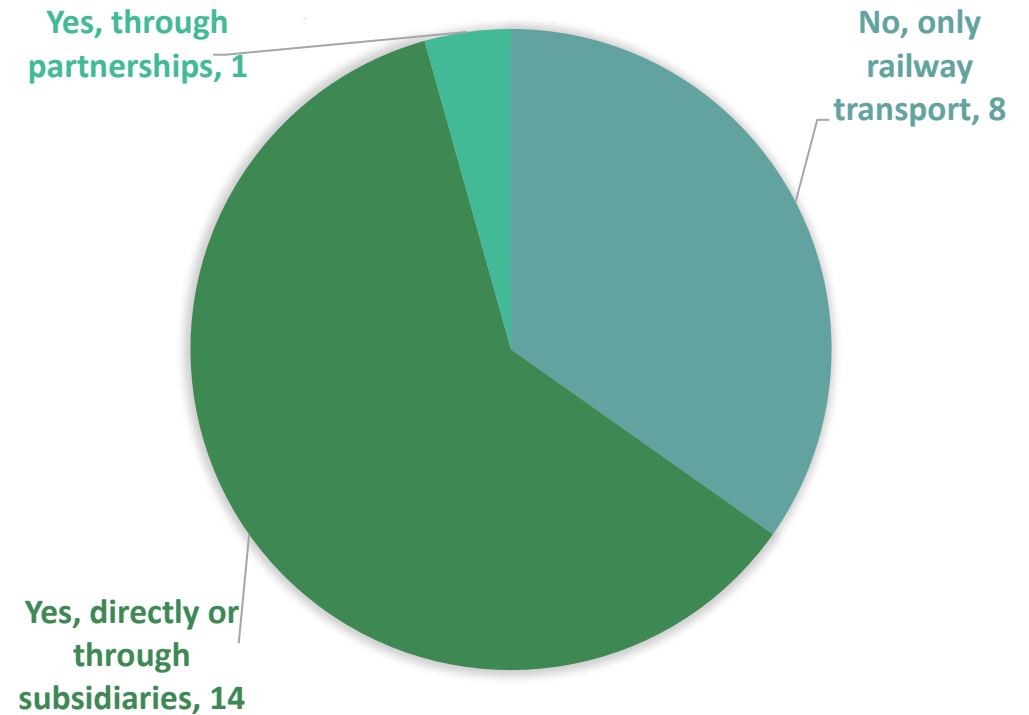
**23 out of 30 respondents*

Respondents' operations in more EU countries

RAILWAY UNDERTAKINGS
N. of respondents

No, only in one country, 12

Yes, through partnerships, 7

Yes, directly or through subsidiaries, 23

TERMINALS*
N. of respondents

Yes, directly or through subsidiaries, 6

Yes, through partnerships, 4

No, only in one country, 16

*26 out of 30 respondents

Tplan
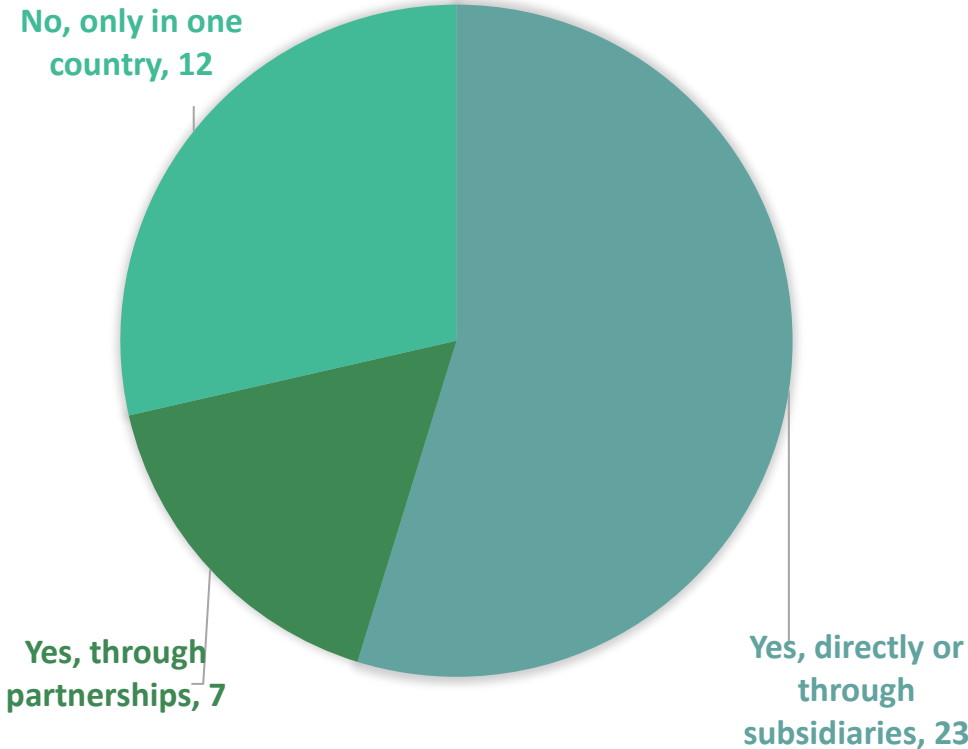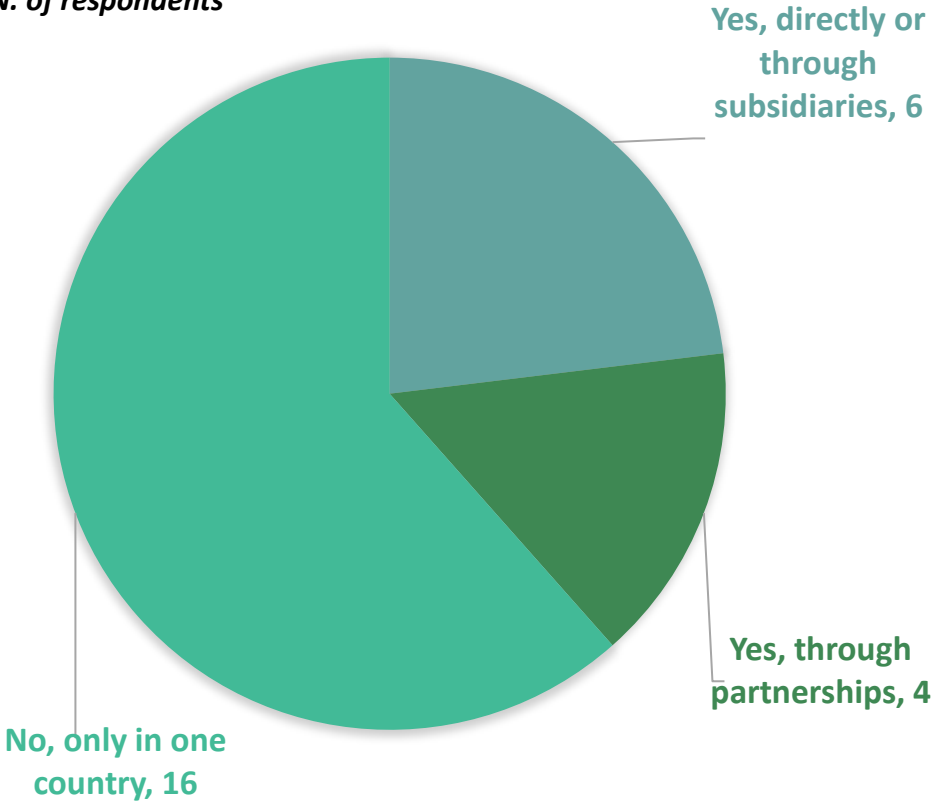
Countries where respondents operate freight railway services/terminals

Railway Undertakings and Terminal Operators/Port Authorities

N. of respondents

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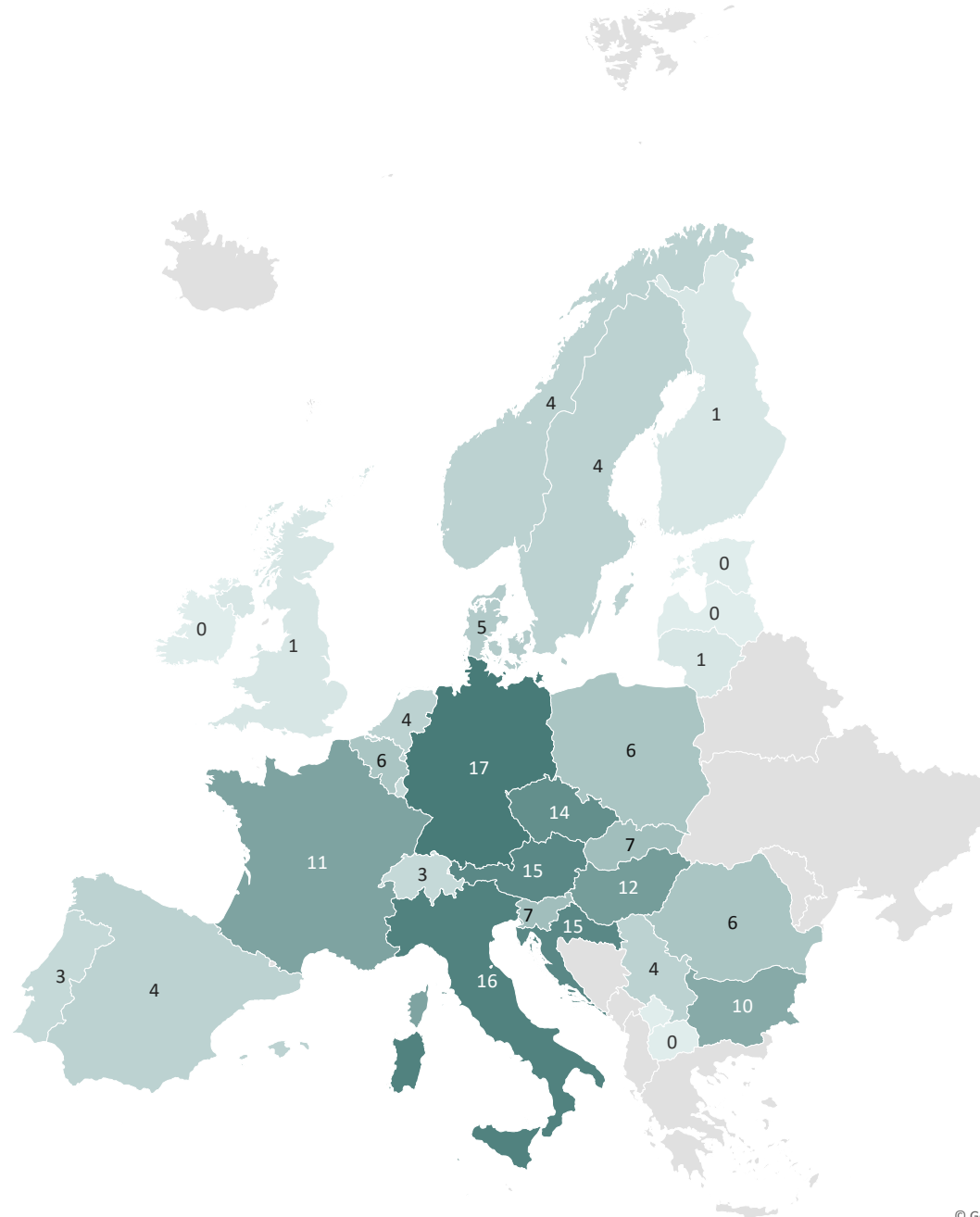
RFCs usage by respondents operating or serving trains at terminals crossing at least one border crossing point(s) in any RFCs

N. of respondents

Legend: Railway Undertakings, Terminals
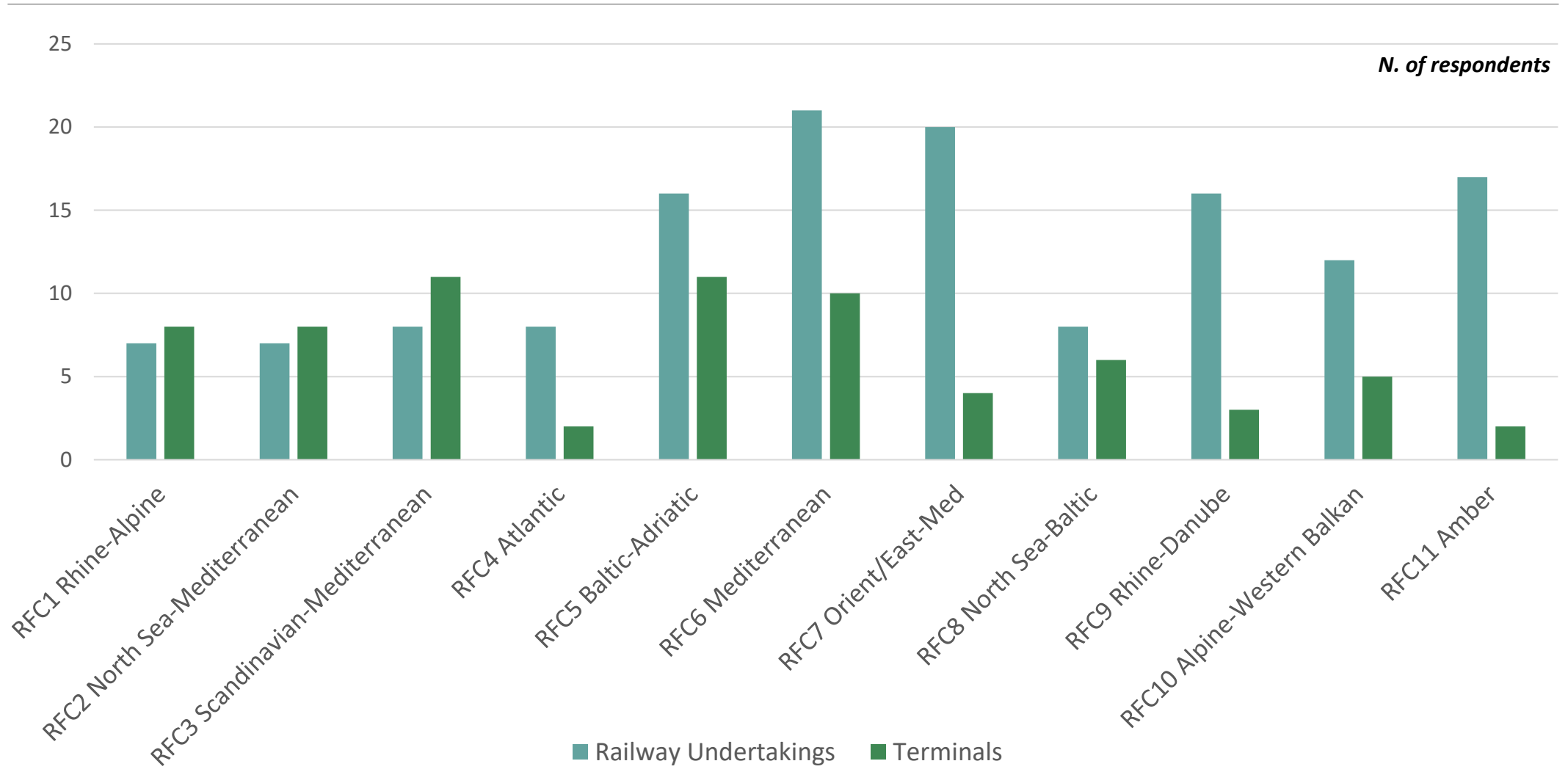
Involved transport modes at respondents' terminal(s)
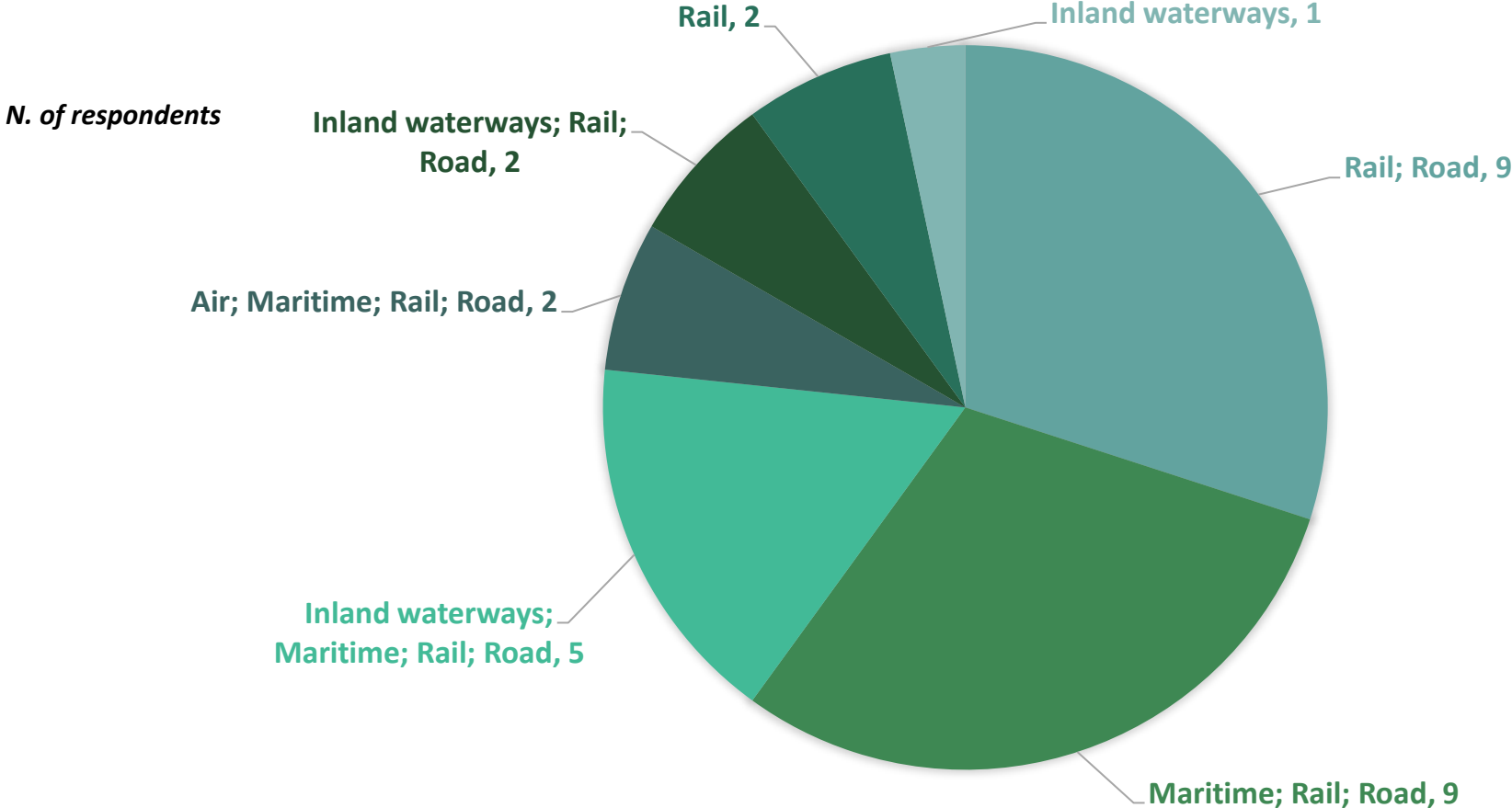
N. of respondents

- Inland waterways, 1
- Rail; Road, 9
- Rail, 2
- Inland waterways; Rail; Road, 2
- Air; Maritime; Rail; Road, 2
- Inland waterways; Maritime; Rail; Road, 5
- Maritime; Rail; Road, 9

Changes occurred since the establishment of the RFCs and expected changes concerning facilitation of international rail freight transport

11RFCS JOINT TMS SURVEY - 2023

Changes occurred since the establishment of the RFCs and expected changes concerning facilitation of international rail freight transport

GOVERNANCE ISSUES

Progress made to date, since the establishment of the RFCs - Governance Issues

N. of respondents

0   10   20   30   40   50

- Facilitate discussion among Member States on high-level strategic issues for the development of international freight transport by railway and on issues related to the performance of rail freight services and the needs of end customers
- Facilitate the involvement of RUs and Terminals in discussing issues and defining solutions to support the development and competitiveness of international rail freight transport
- Encourage opening of Advisory Group structure to interested railway customers. Work with all players in the logistics chain on the quality, performance and economic viability of rail freight and intermodal transport
- Cooperate with the TEN-T Core Network Corridors and ERTMS horizontal priority for the coordinated development of corridors' infrastructure, digital and operational interoperability
- Facilitate harmonisation of legislative, regulatory, procedural and operational rules in cooperation with the National safety Authorities and the European Union Agency for Railways

■ Some/substantial   ■ Little/none   ■ Do not answer/know

Tplan

15

Changes occurred since the establishment of the RFCs and expected changes concerning facilitation of international rail freight transport

GOVERNANCE ISSUES

Expected changes based on current programmes / initiatives - Governance Issues

N. of respondents

Facilitate discussion among Member States on high-level strategic issues for the development of international freight transport by railway and on issues related to the performance of rail freight services and the needs of end customers

Facilitate the involvement of RUs and Terminals in discussing issues and defining solutions to support the development and competitiveness of international rail freight transport

Encourage opening of Advisory Group structure to interested railway customers. Work with all players in the logistics chain on the quality, performance and economic viability of rail freight and intermodal transport

Cooperate with the TEN-T Core Network Corridors and ERTMS horizontal priority for the coordinated development of corridors' infrastructure, digital and operational interoperability

Facilitate harmonisation of legislative, regulatory, procedural and operational rules in cooperation with the National safety Authorities and the European Union Agency for Railways

■ Some/substantial ■ Little/none ■ Do not answer/know

Changes occurred since the establishment of the RFCs and expected changes concerning facilitation of international rail freight transport

GOVERNANCE ISSUES

Best fitting governance to bring issue forward - Governance Issues

N. of respondents

Legend: RFCs | EU Network of IMs | Both RFCs and EU Network of IMs | Do not know/not answer

Changes occurred since the establishment of the RFCs and expected changes concerning facilitation of international rail freight transport
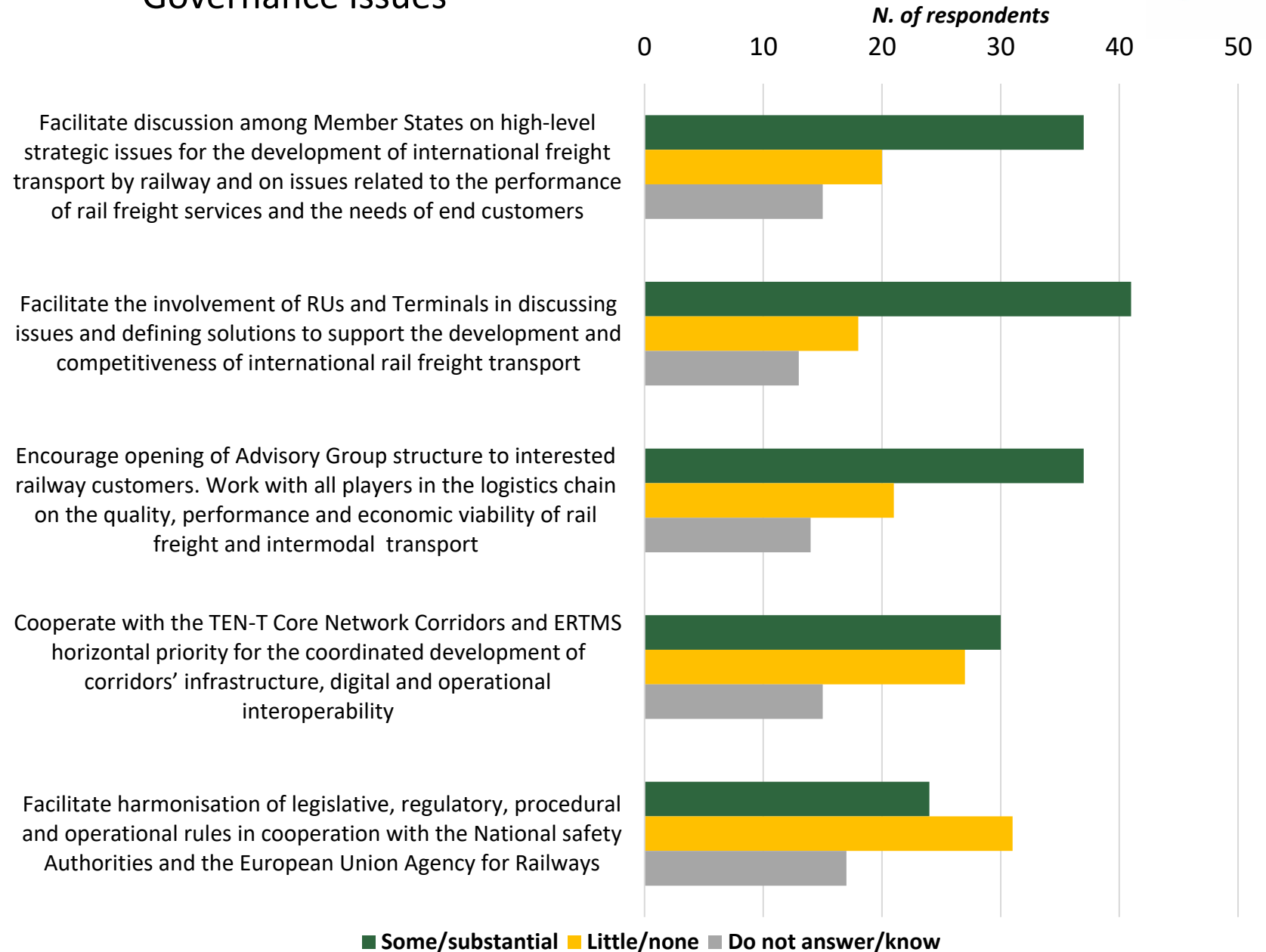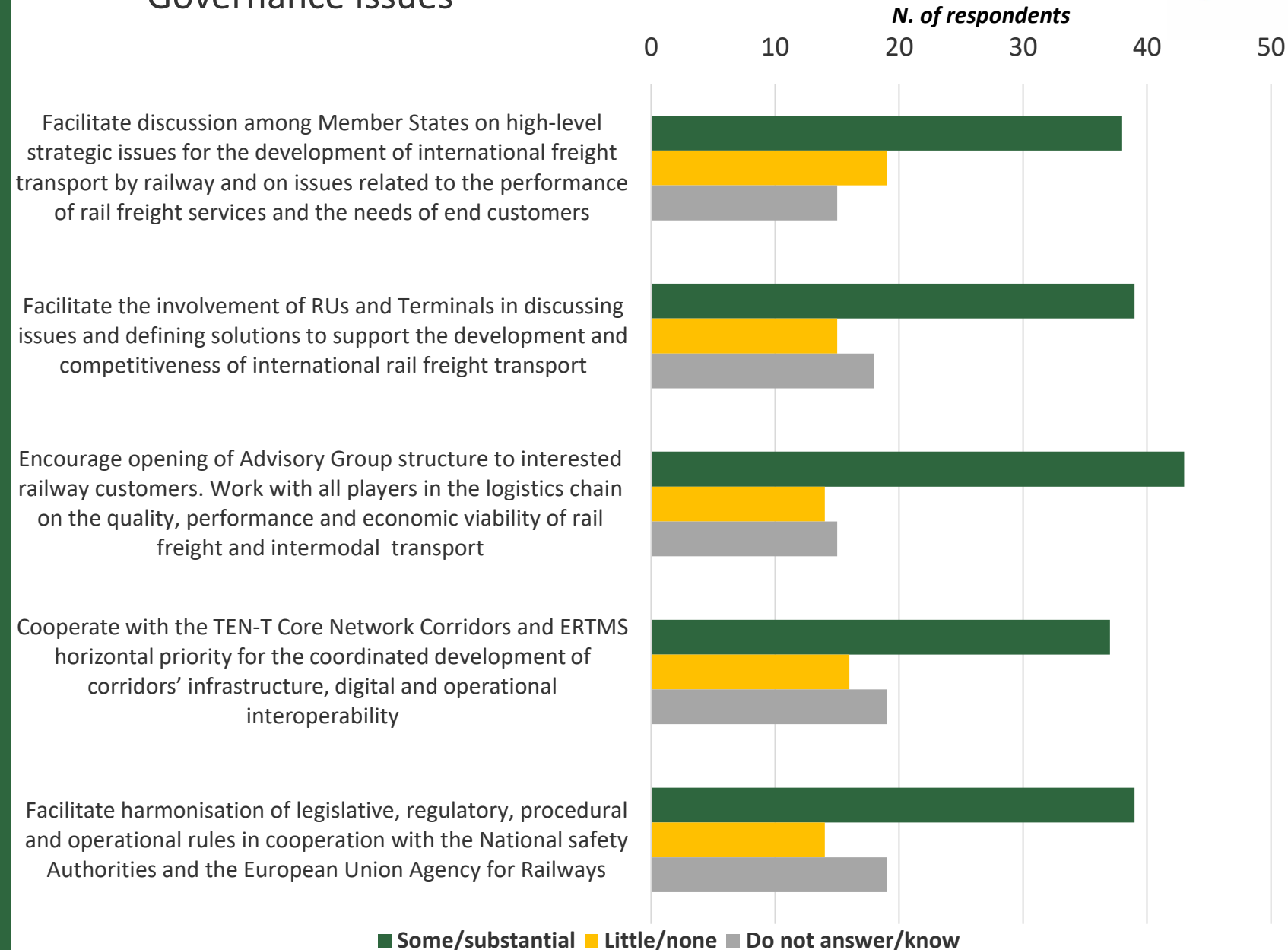
OPERATIONAL EFFICIENCY ISSUES

Progress made to date, since the establishment of the RFCs - Operational Efficiency Issues

N. of respondents

Identify/map issues to be addressed for the further development of international rail freight transport, particularly at cross-border sections and enhance cooperation (dwelling time at BCPs, removal of language barriers,…

Enhance the resilience of international rail freight transport in the event of major crises and the implementation of necessary contingency measures, e.g. International Contingency Management (ICM) and development of…

Conduct initiatives to solve issues related to rail freight transport (e.g. mitigating rail noise, Long Trains Operations, Quality Circle Operations, availability of diversionary routes and language pilot…)

Promote the technical and operational harmonisation of the railways in Europe, removing redundant national rules which are covered by the Technical Specifications for Interoperability (TSI) and monitor progress in achieving the…

Establish and maintain coordinated and common knowledge sharing and digital platforms to disseminate and share information among relevant sector stakeholders and assist customers (CID, CIP, One-Stop Shops, PCS, Digital Automatic…

Develop and encourage the utilisation of a harmonised set of Key Performance Indicators as a means of measurement of the characteristics and performance of the quality of services for competitive rail freight

TITLE ■ Some/substantial ■ Little/none ■ Do not answer/know

18
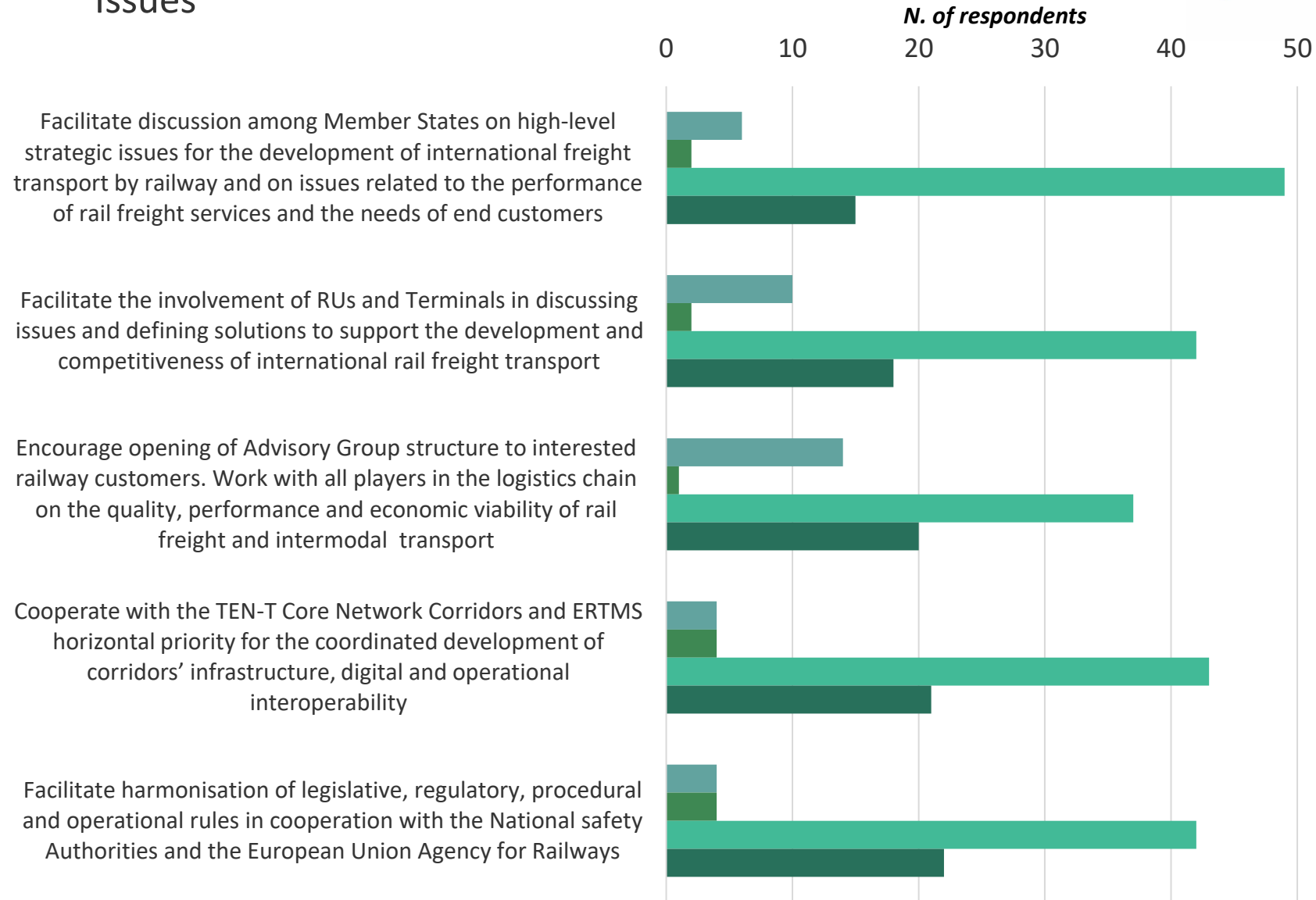
Changes occurred since the establishment of the RFCs and expected changes concerning facilitation of international rail freight transport

OPERATIONAL EFFICIENCY ISSUES

Expected changes based on current programmes / initiatives by RFCs - Operational Efficiency Issues

Tplan

N. of respondents

Identify/map issues to be addressed for the further development of international rail freight transport, particularly at cross-border sections and enhance cooperation (dwelling time at BCPs, removal of language barriers, harmonisation of national rules…)

Enhance the resilience of international rail freight transport in the event of major crises and the implementation of necessary contingency measures, e.g. International Contingency Management (ICM) and development of contingency plans

Conduct initiatives to solve issues related to rail freight transport (e.g. mitigating rail noise, Long Trains Operations, Quality Circle Operations, availability of diversionary routes and language pilot…)

Promote the technical and operational harmonisation of the railways in Europe, removing redundant national rules which are covered by the Technical Specifications for Interoperability (TSI) and monitor progress in achieving the relevant standards [...]

Establish and maintain coordinated and common knowledge sharing and digital platforms to disseminate and share information among relevant sector stakeholders and assist customers (CID, CIP, One-Stop Shops, PCS, Digital Automatic…

Develop and encourage the utilisation of a harmonised set of Key Performance Indicators as a means of measurement of the characteristics and performance of the quality of services for competitive rail freight

TITLE ■ **Some/substantial** ■ **Little/none** ■ **Do not answer/know**

Changes occurred since the establishment of the RFCs and expected changes concerning facilitation of international rail freight transport

OPERATIONAL EFFICIENCY ISSUES

Best fitting governance to bring issue forwardRFCs - Operational Efficiency Issues
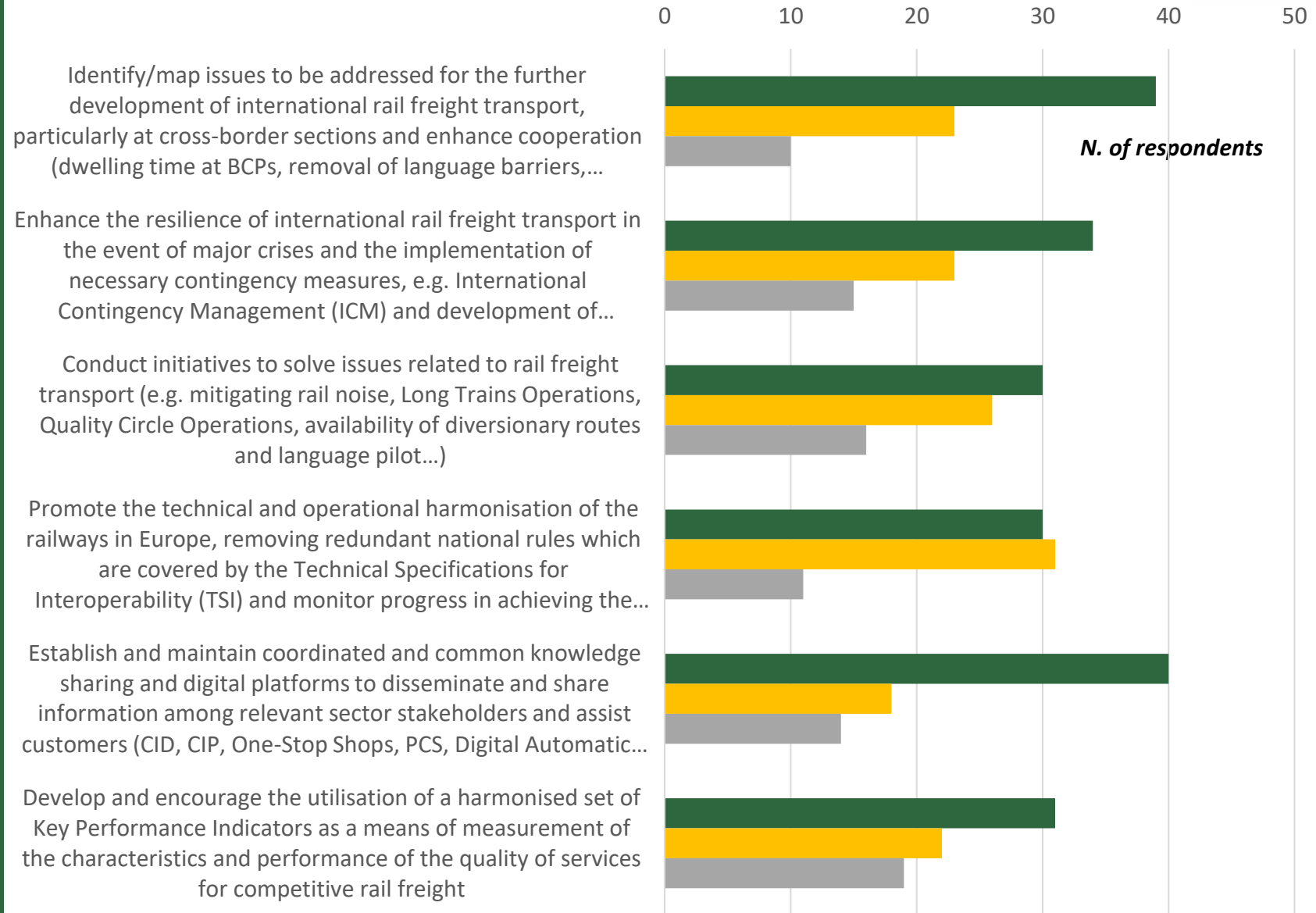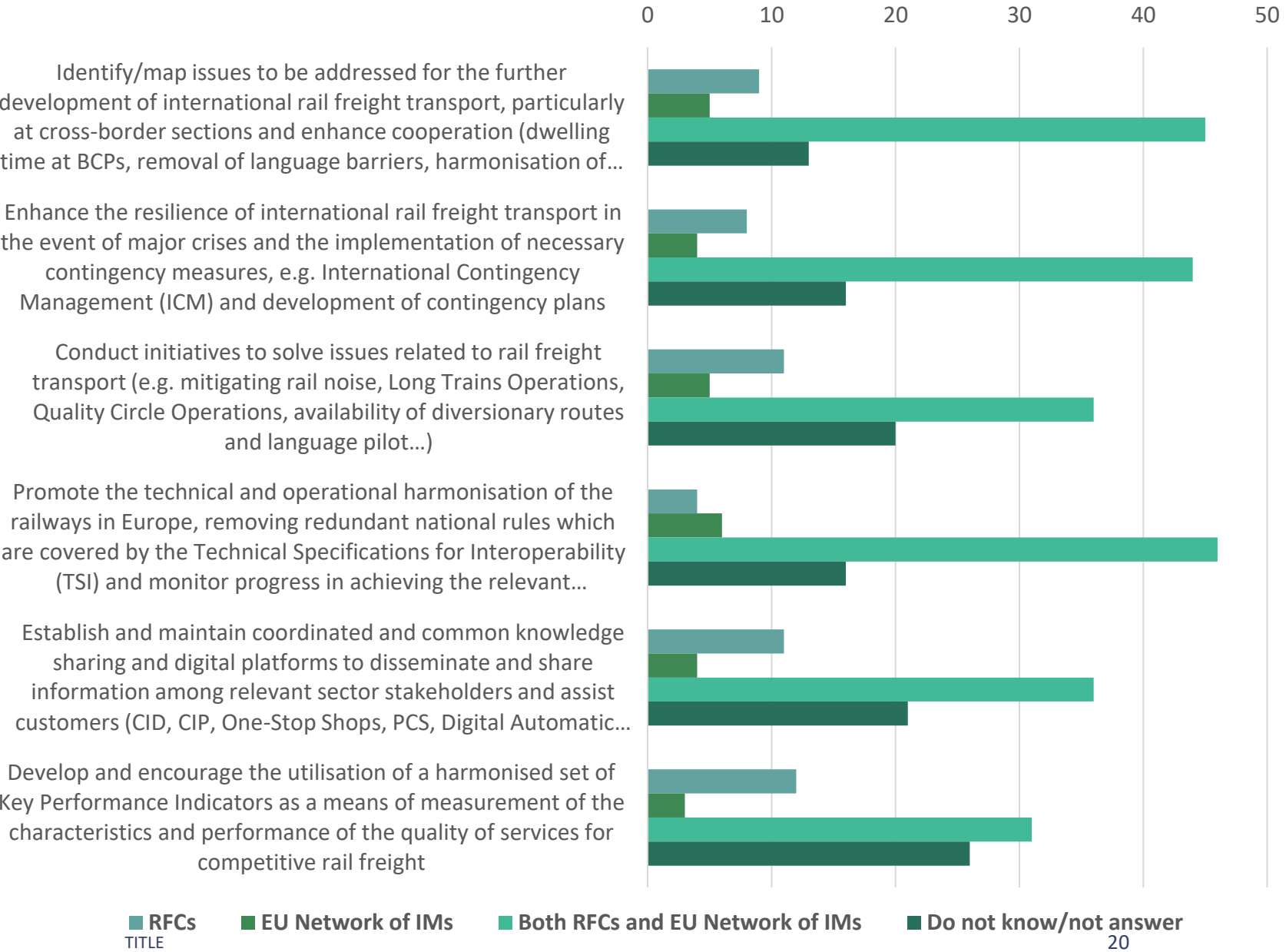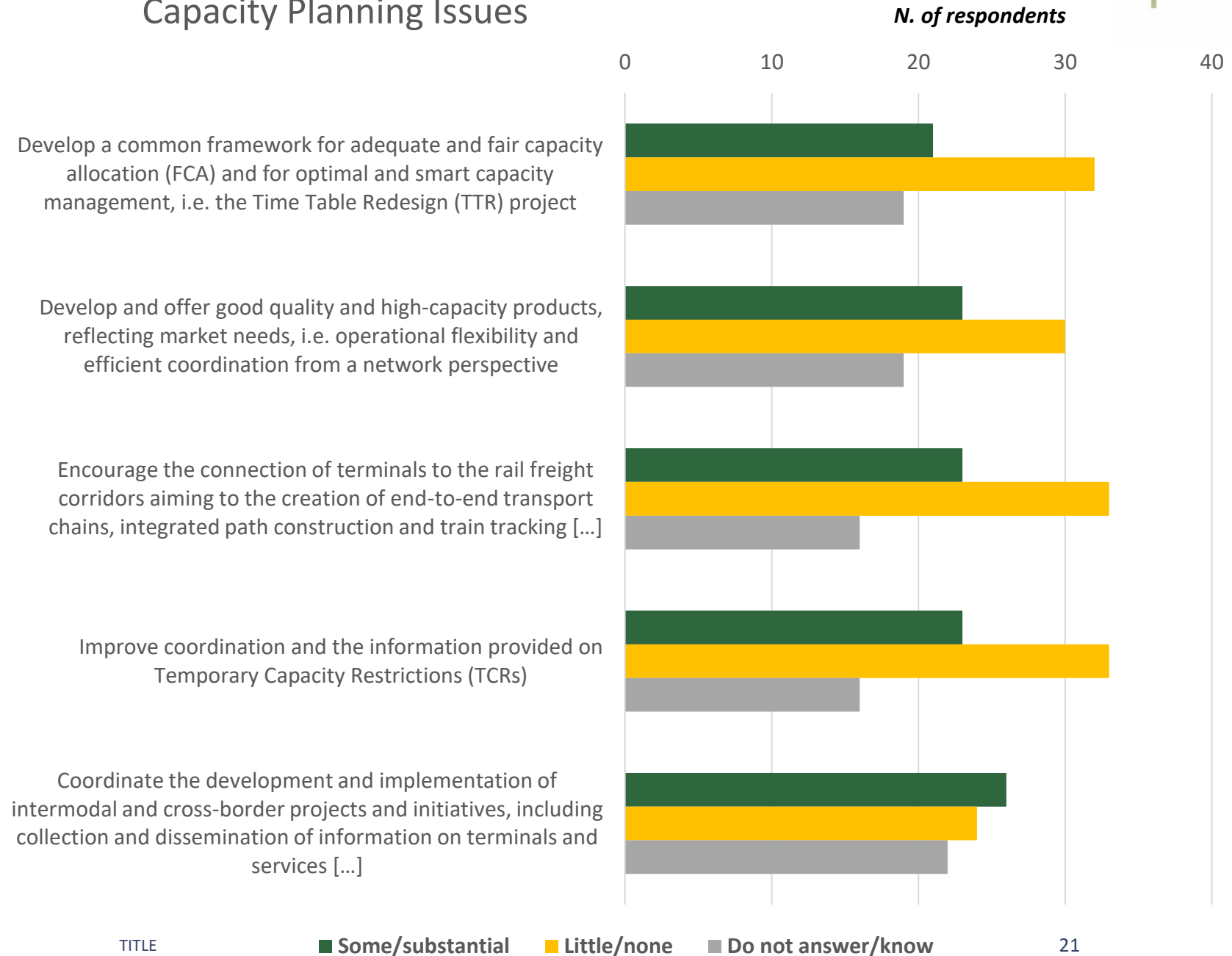
N. of respondents

Legend:
- RFCs
- EU Network of IMs
- Both RFCs and EU Network of IMs
- Do not know/not answer

TITLE

Changes occurred since the establishment of the RFCs and expected changes concerning facilitation of international rail freight transport
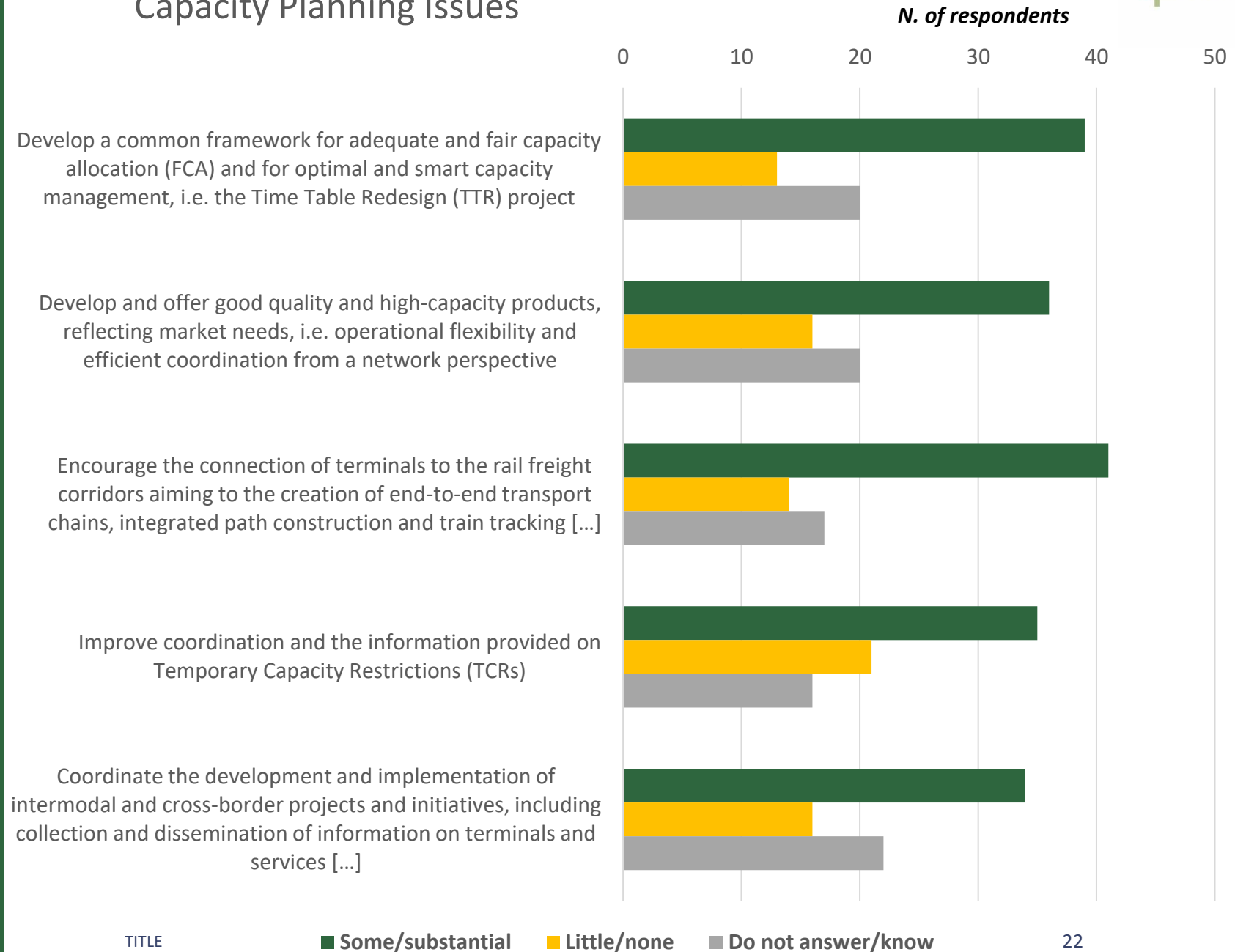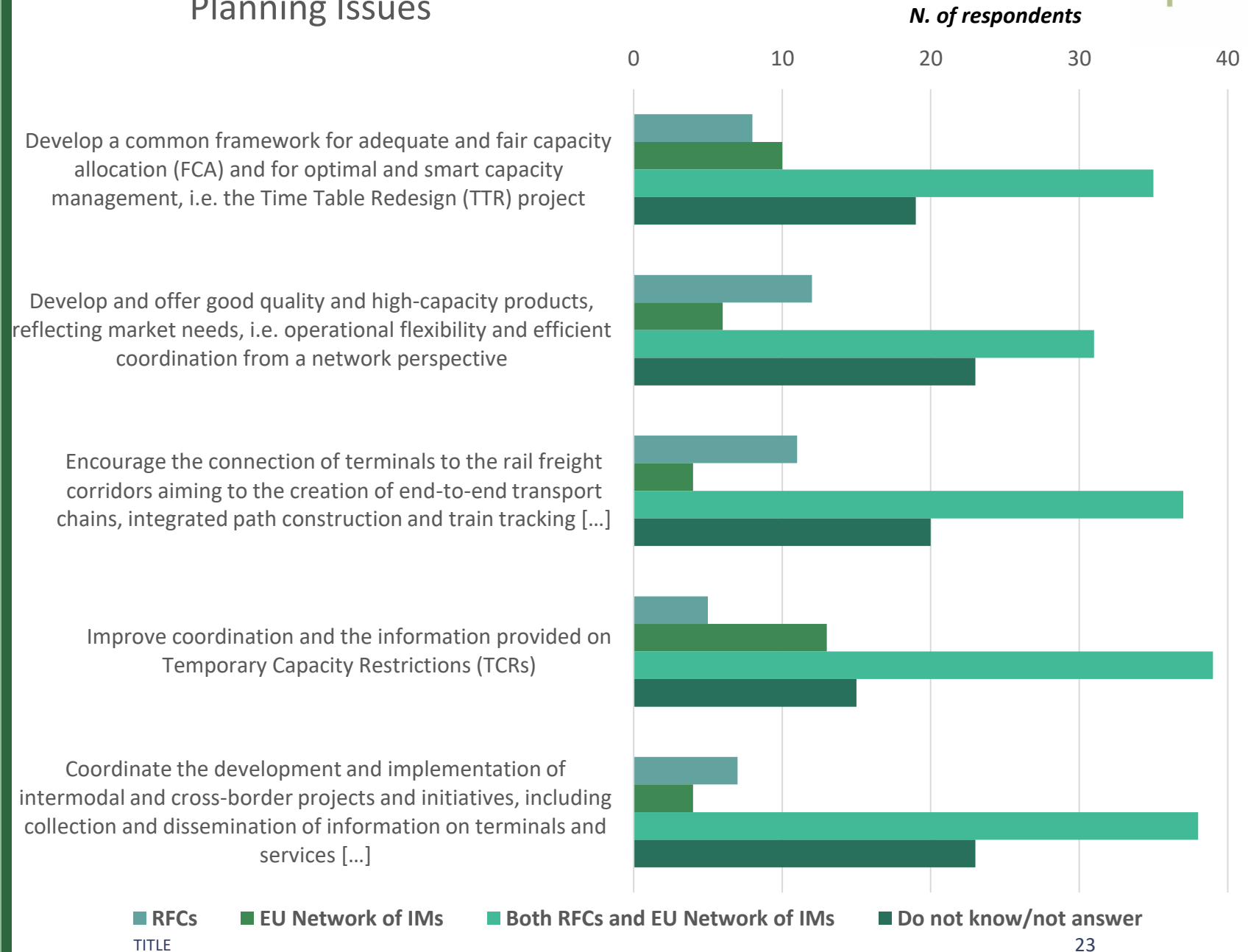
CAPACITY PLANNING ISSUES

QUESTION B) 3.RT

Progress made to date, since the establishment of the RFCs - Capacity Planning Issues

N. of respondents

Develop a common framework for adequate and fair capacity allocation (FCA) and for optimal and smart capacity management, i.e. the Time Table Redesign (TTR) project

Develop and offer good quality and high-capacity products, reflecting market needs, i.e. operational flexibility and efficient coordination from a network perspective

Encourage the connection of terminals to the rail freight corridors aiming to the creation of end-to-end transport chains, integrated path construction and train tracking […]

Improve coordination and the information provided on Temporary Capacity Restrictions (TCRs)

Coordinate the development and implementation of intermodal and cross-border projects and initiatives, including collection and dissemination of information on terminals and services […]

TITLE ■ Some/substantial ■ Little/none ■ Do not answer/know

Changes occurred since the establishment of the RFCs and expected changes concerning facilitation of international rail freight transport

CAPACITY PLANNING ISSUES

Expected changes based on current programmes / initiatives - Capacity Planning Issues

N. of respondents

Issue	Some/substantial	Little/none	Do not answer/know
Develop a common framework for adequate and fair capacity allocation (FCA) and for optimal and smart capacity management, i.e. the Time Table Redesign (TTR) project			
Develop and offer good quality and high-capacity products, reflecting market needs, i.e. operational flexibility and efficient coordination from a network perspective			
Encourage the connection of terminals to the rail freight corridors aiming to the creation of end-to-end transport chains, integrated path construction and train tracking [...]			
Improve coordination and the information provided on Temporary Capacity Restrictions (TCRs)			
Coordinate the development and implementation of intermodal and cross-border projects and initiatives, including collection and dissemination of information on terminals and services [...]			

TITLE ■ Some/substantial ■ Little/none ■ Do not answer/know

22

Changes occurred since the establishment of the RFCs and expected changes concerning facilitation of international rail freight transport

CAPACITY PLANNING ISSUES

Best fitting governance to bring issue forward - Capacity Planning Issues

N. of respondents

Develop a common framework for adequate and fair capacity allocation (FCA) and for optimal and smart capacity management, i.e. the Time Table Redesign (TTR) project

Develop and offer good quality and high-capacity products, reflecting market needs, i.e. operational flexibility and efficient coordination from a network perspective

Encourage the connection of terminals to the rail freight corridors aiming to the creation of end-to-end transport chains, integrated path construction and train tracking [...]

Improve coordination and the information provided on Temporary Capacity Restrictions (TCRs)

Coordinate the development and implementation of intermodal and cross-border projects and initiatives, including collection and dissemination of information on terminals and services [...]

■ RFCs   ■ EU Network of IMs   ■ Both RFCs and EU Network of IMs   ■ Do not know/not answer

TITLE

Comments on changes occurred since the establishment of the RFCs and expected changes concerning facilitation of international rail freight - RUs

The capacity of PaP´s from RFC Network still don´t fit the needful volume and quality (capacity restrictions, timetable planing). Poor capacity harmonisation between IM´s (lenght, weight, closures) limits the use of RFC offer

Very little changes on the west side of the Atlantic corridor

Offered volume of PaP's from RFC Network was increasing and the quality of PaP Offer was getting a bit better. Still most of PaP don't fit to market needs due to very different timetable Processes of IM's.
Expectation will be: All IM's need to support Rail Freight Traffic in similar ways - means equal offer of saved capacity (longterm) and harmonization of capacity restrictions process and the availability of reroutings over 3 and more countries

RFC have big administration but no practical use, CORR paths are often slower than normal paths

Merging RFC 1+2
Only 1 RFC Benelux/Germany - Spain

The foreseen merger of RFCs and CNCs into the European Transport Corridors (ETCs) in the framework of the expected new TEN-T Regulation (currently in revision process) will raise the question of RU representation in future decision bodies. We expect that the voice of RUs will continue to be heard in the ETCs and even strengthened in the way that it will also influence infrastructure investment plans and assure the continuation of valuable working groups triggered by operations. (e.g. regional WGs as TCR consultation platform, local WGs for the improvement of cross-border infrastructure and procedures, WGs for the definition of performance improvement measures, platforms for information on infrastructure development projects and their influencing from operational point of view)

mutual recognition of the train tail lamps between DB Netz, ÖBB Infra and RFI on RFC3

Unreal and expensive administration and legislation compared to road transport

Regulation on usage of Buffer wagon (HU, RO, BG)

RFC + IM's have to provide additional long sidetracks/hubs, for short term parking before bottleneck stations (border stations, ports). Not to build just "go-thru" lines - look at the high-way parking places for trucks. Green EU means freight on the trains, not on the trucks. But to truck EU is giving fore flexibility and discount - rail freight has no chance to be competitive to the roads

The RFC is a good front door for RU's to raise topics and to submit them to the EU or to the IM or NSA;
One subject on which we hope to see developments is the facilitation of cross-border operations (language capacity reduction for the RU's driver; developement of the translation tools etc... Good coordination with the RFC on PAP'S (harmonisation of national Pap's)

The big changes will come after Romania will enter the Schengen area. As some countries are not in favour of this solution, it is hard expecting improvements in the future

Harmonization of all IM regarding prioritization of the RFC trains path

Comments on changes occurred since the establishment of the RFCs and expected changes concerning facilitation of international rail freight - Terminals

Reference made to UIRR comments
I don't know the period before the creation of RFC's
I am concerned that the proposed changes in the Greening Transport Package may worsen the involvement of the customers; the package is lacking the formal customer involvement found in the RAG/TAG. A stronger end customer (freight owner/freight forwarder) involvement should also be incentivised, as has been done on ScanMed RFC
RFC have big administration but no practical use
Cannot give any comments, as the entity I am representing is the port authority responsible only for construction/maintenance/management of port infrastructure. Transshipment operations, also involving those related to rail transport of all kind (bulk, intermodal, project cargo), are performed by port operators situated in the port and using the port's infrastructure
The works of the RFCs are not being translated in a significant increase in international rail services. There are many factors that do not depend on the RFCs but we believe that, in general, more attention needs to be paid to the needs of shippers and operators
It is considered that changing corridors, or replacing them with another type of organisation, is not necessarily problematic. Like all transitions there will be a period of overlap between the current and the new system. Is the proposal referred to the European Network of Infrastructure Managers (ENIM)? in this case the objectives that it sets are similar to those already carried out by RNE (Rail Network Europe) from the functional point of view we prefer the solution that offers a concrete result. To date, the corridors have proved useful in addressing large-scale issues. We are available for any further discussions
A good initiative. A complex work but my impression is that there is a good progress forward

Market trends

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Respondent has operated/operates rail services or manages/operates terminals serving trains across at least one border crossing point(s) in any RFCs

RAILWAY UNDERTAKINGS*
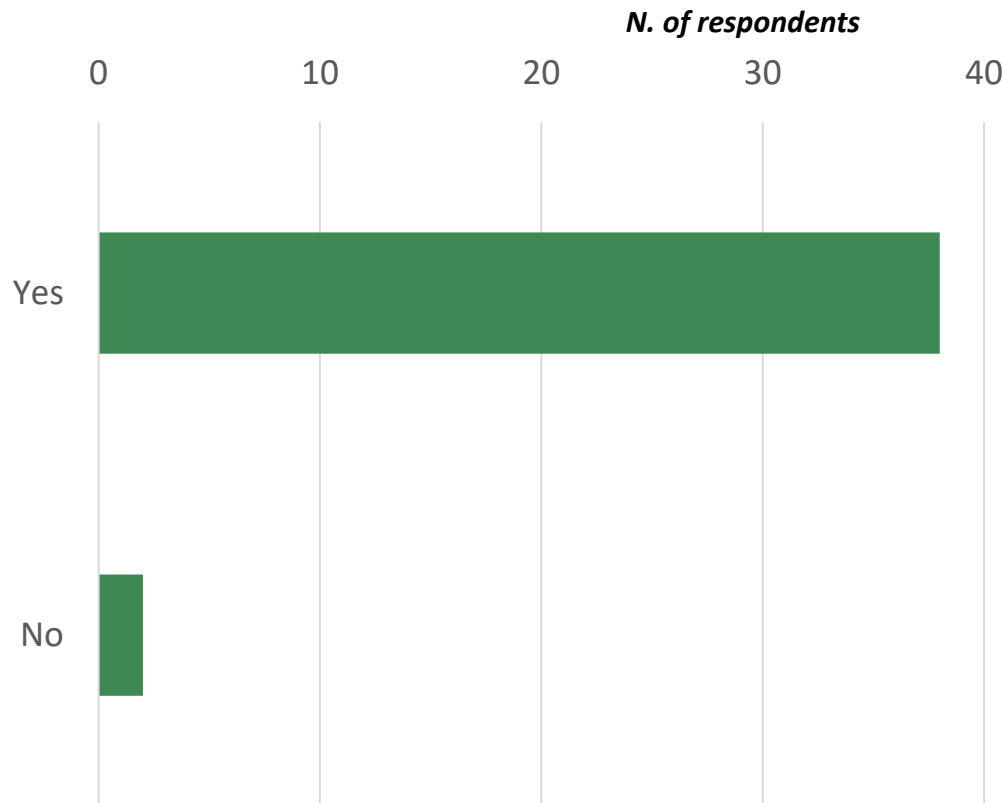
N. of respondents

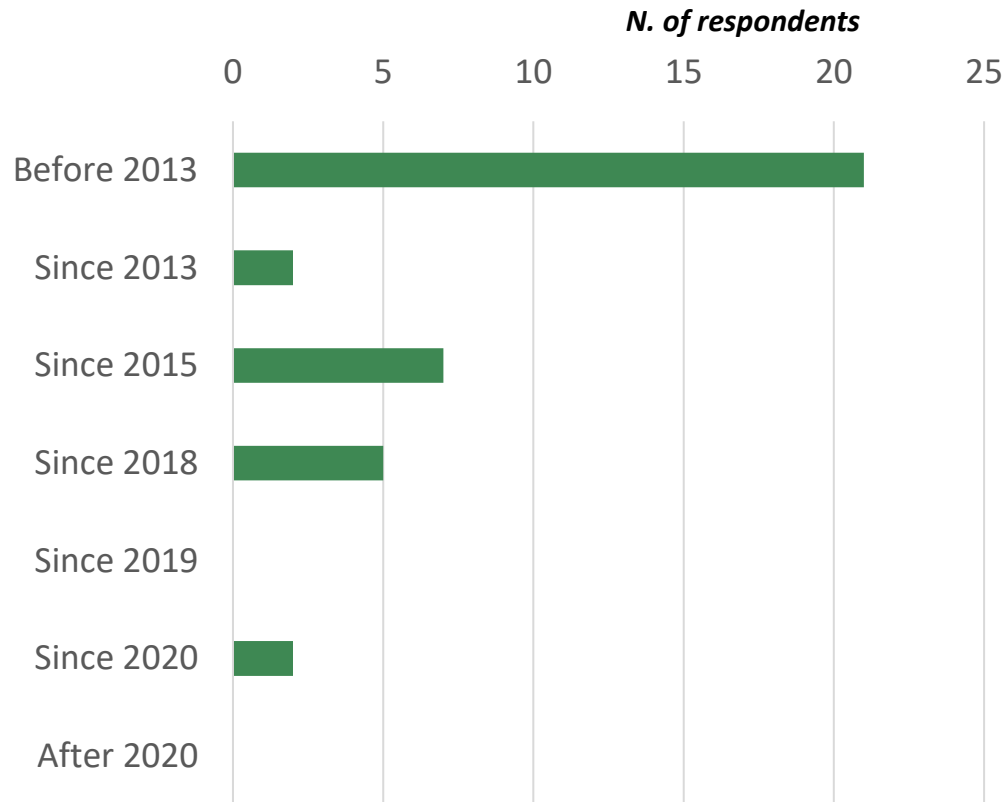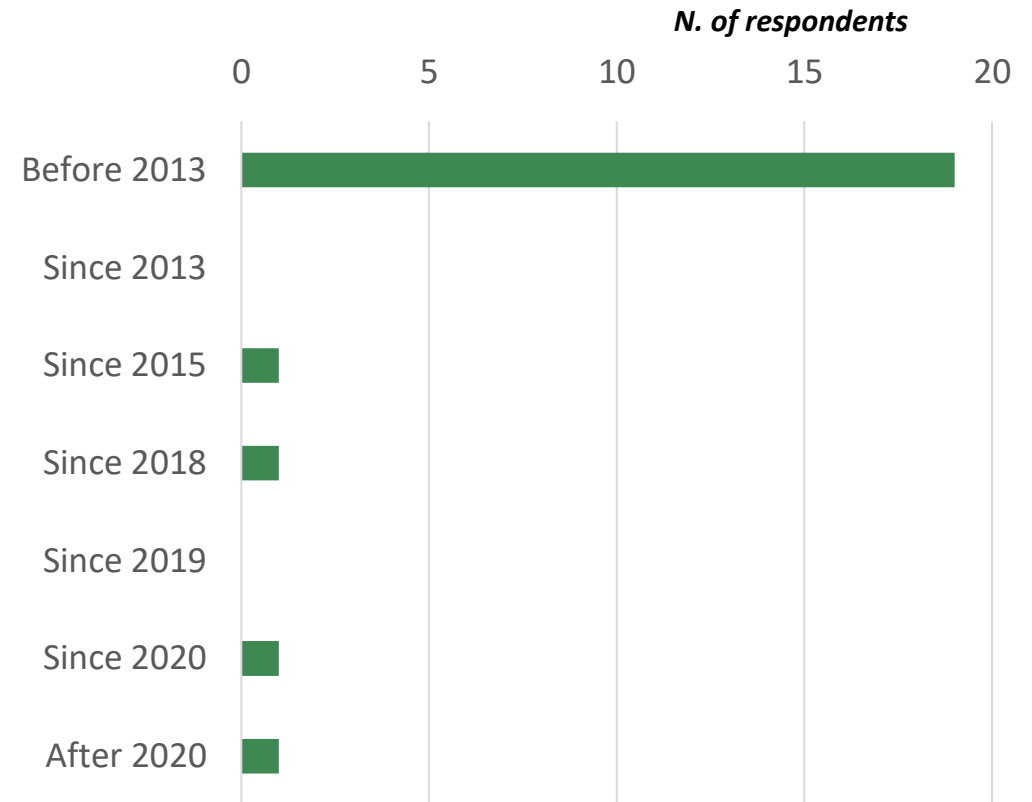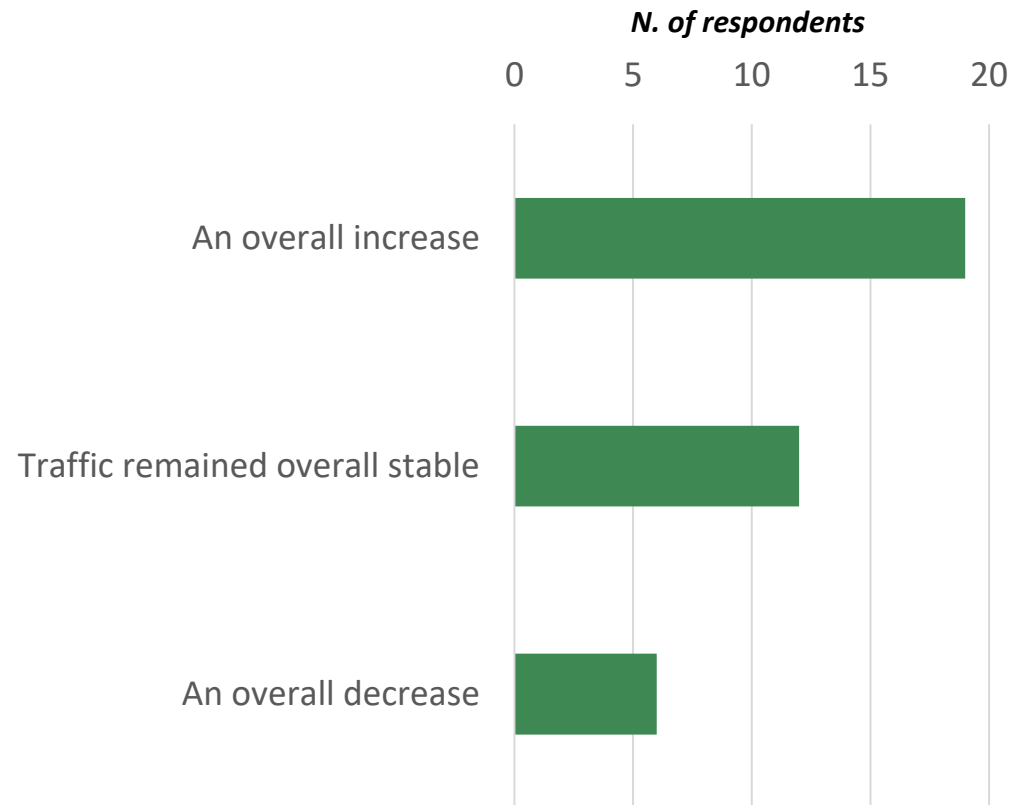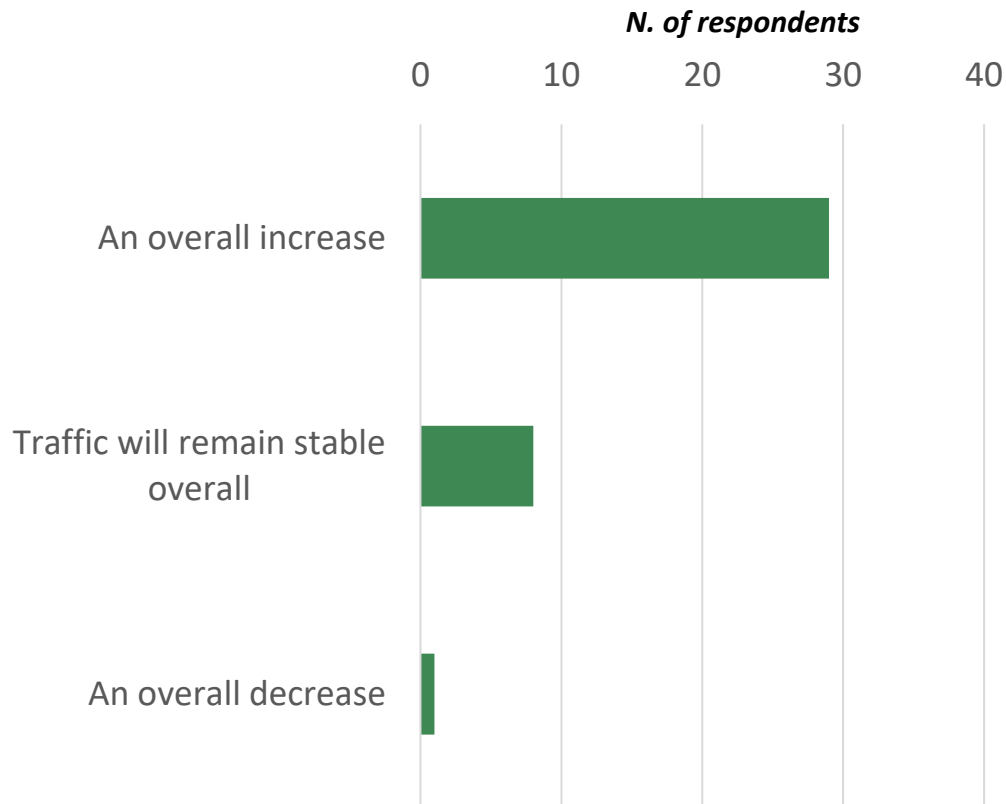*40 out of 42 respondents
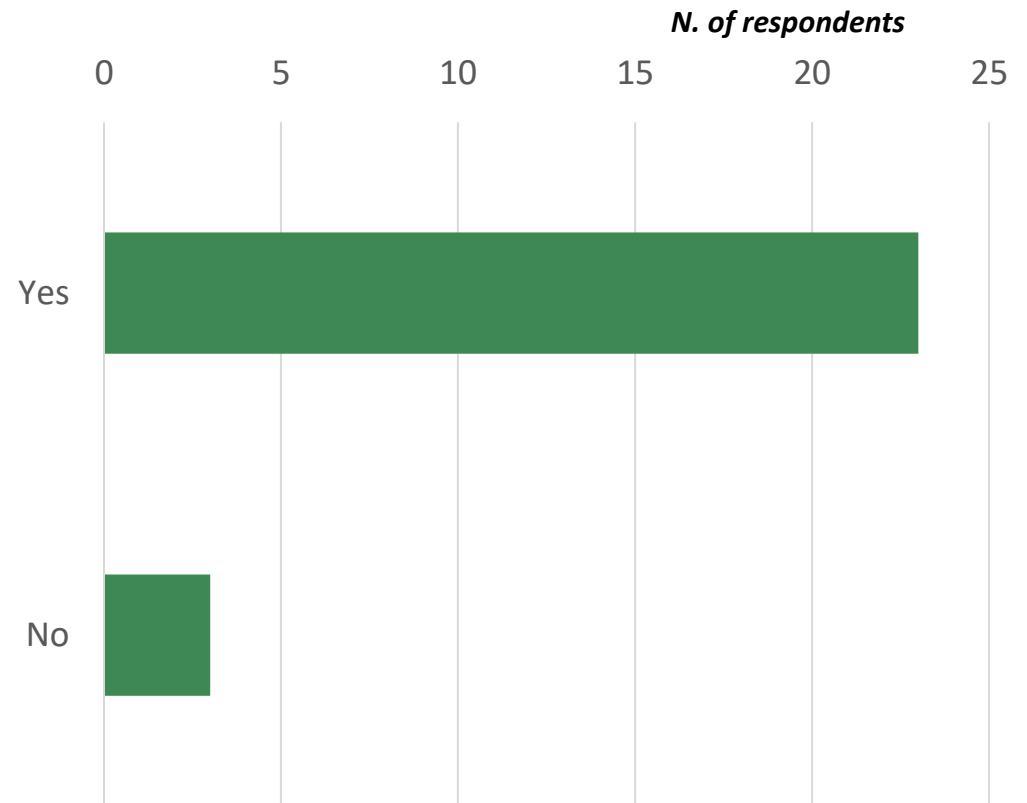
TERMINALS**

N. of respondents

**26 out of 30 respondents

Respondent has operated/operates rail services or manages/operates terminals serving trains across at least one border crossing point(s) in any RFCs

RAILWAY UNDERTAKINGS*

N. of respondents

	N.
Before 2013	21
Since 2013	2
Since 2015	7
Since 2018	5
Since 2019	0
Since 2020	2
After 2020	0

37 out of 42 respondents

TERMINALS**

N. of respondents

	N.
Before 2013	19
Since 2013	0
Since 2015	1
Since 2018	1
Since 2019	0
Since 2020	1
After 2020	1

**23 out of 30 respondents*

Variation in the operation of trains and in serving trains crossing at least one border crossing point(s) in any RFCs since 2013

RAILWAY UNDERTAKINGS*

N. of respondents

37 out of 42 respondents
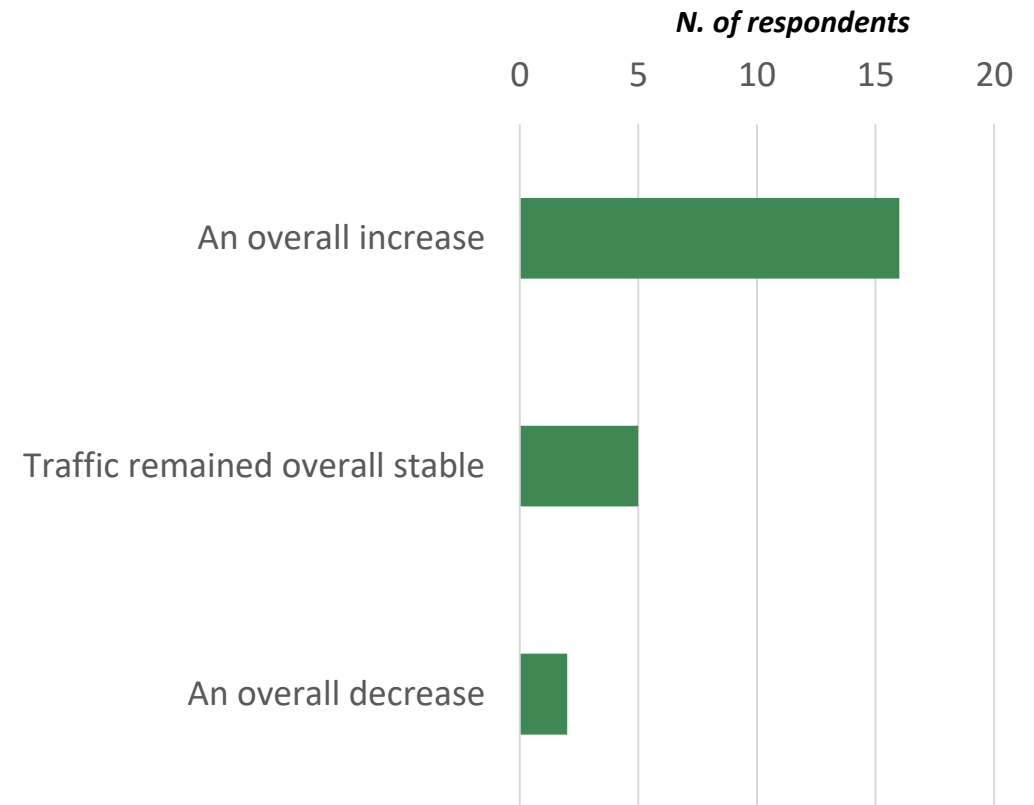
TERMINALS**

N. of respondents

**23 out of 30 respondents*

Variation in the operation of trains and in serving trains crossing at least one border crossing point(s) in any RFCs in the short term, until 2030

RAILWAY UNDERTAKINGS*

TERMINALS**

N. of respondents

N. of respondents

*38 out of 42 respondents

**27 out of 30 respondents

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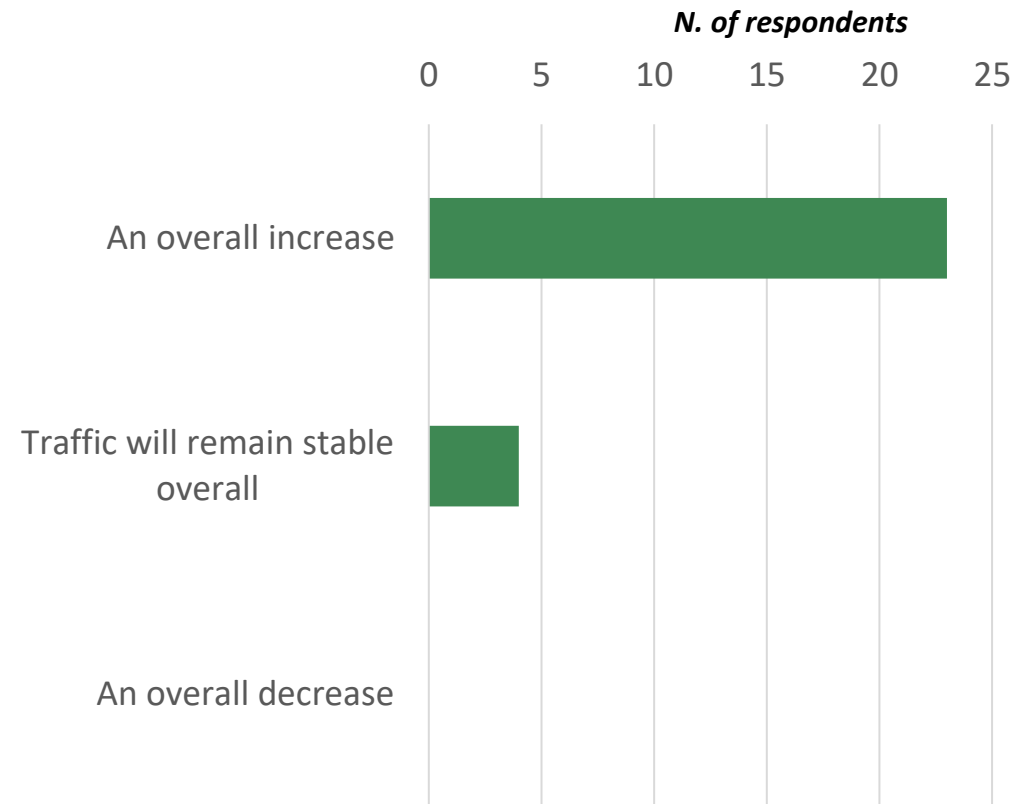
Experienced and expected traffic trends according to the trains operated by RUs, crossing at least one border crossing point(s) in any RFCs

EXPERIENCED VARIATION SINCE 2013

N. of respondents
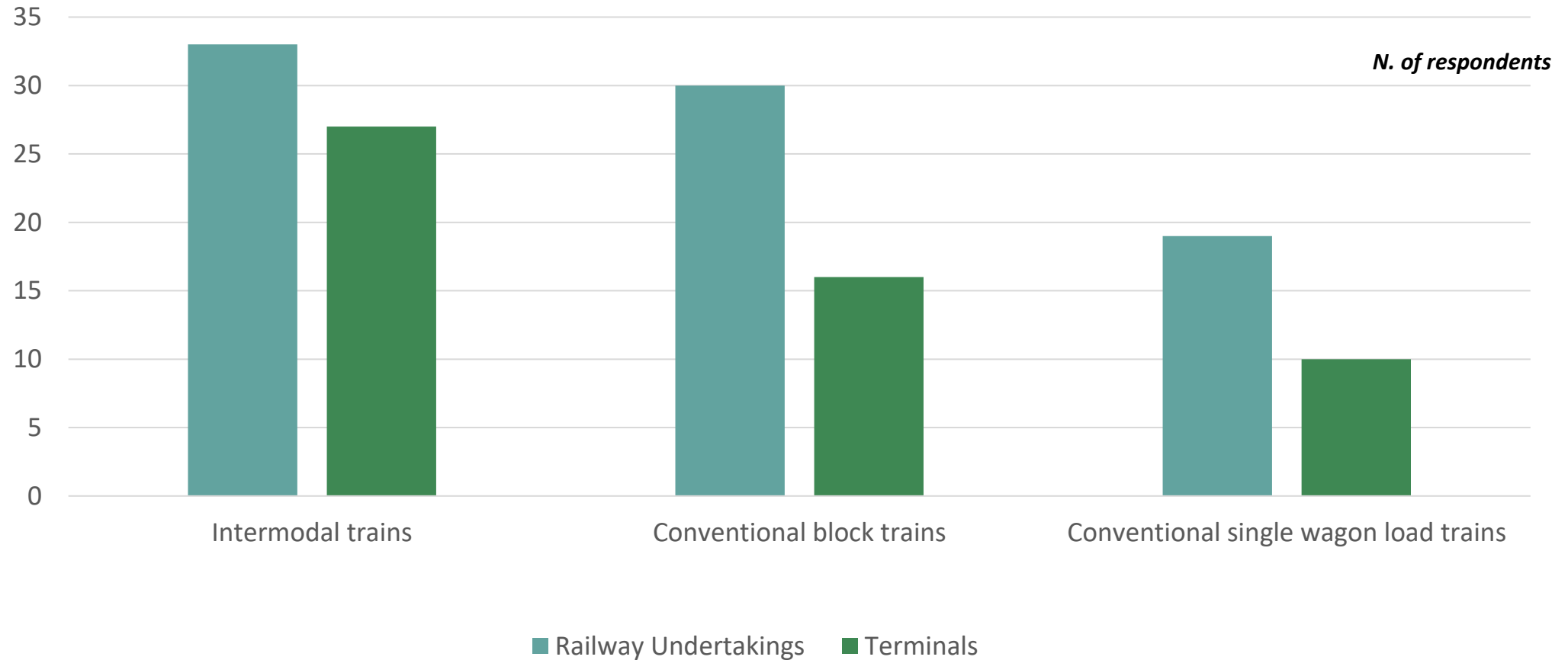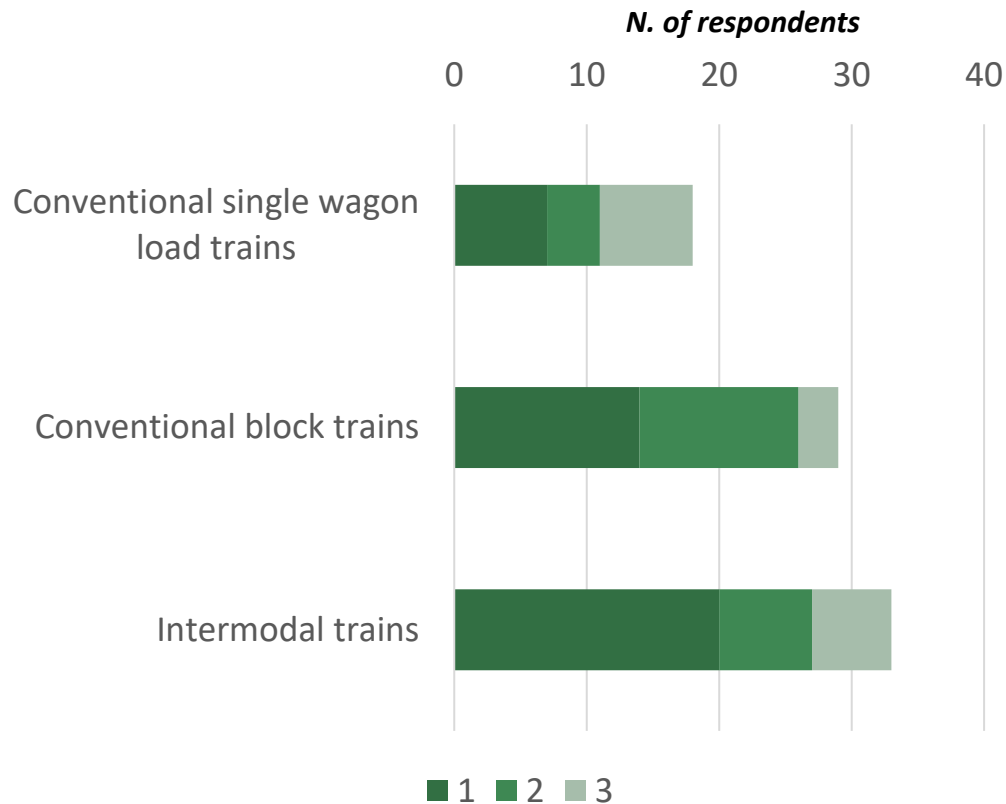
EXPECTED VARIATION UNTIL 2030

N. of respondents

RFC1 Rhine-Alpine
RFC2 North Sea-Mediterranean
RFC3 Scandinavian-Mediterranean
RFC4 Atlantic
RFC5 Baltic-Adriatic
RFC6 Mediterranean
RFC7 Orient/East-Med
RFC8 North Sea-Baltic
RFC9 Rhine-Danube
RFC10 Alpine-Western Balkan
RFC11 Amber
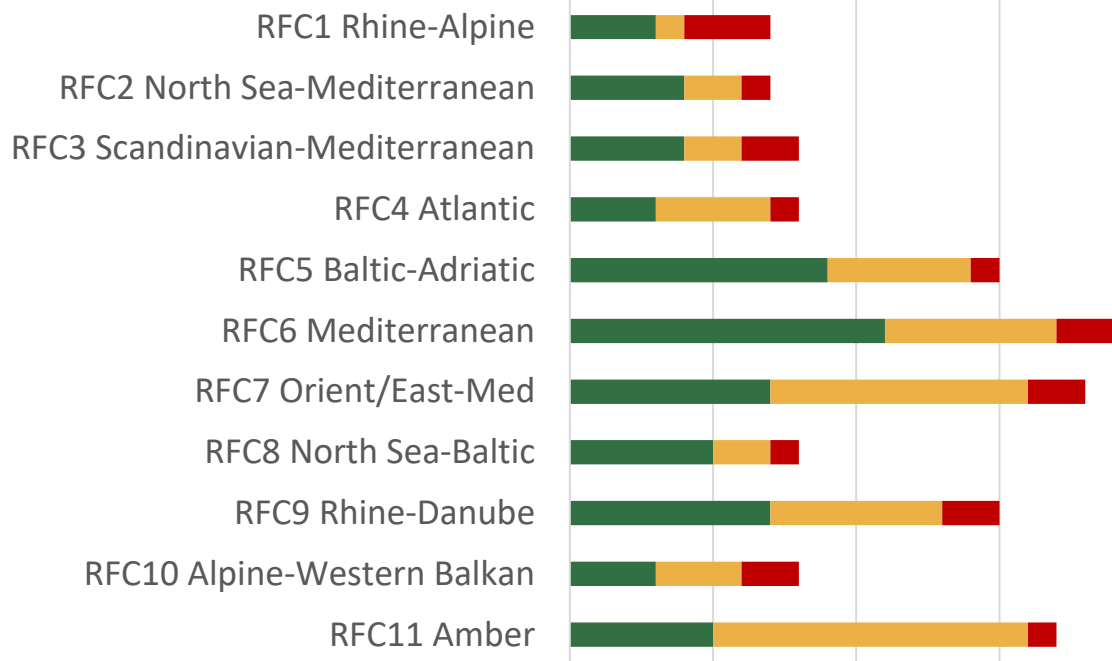
■ Existing/new operations growing   ■ Existing/new operations stable

■ Existing/new operations declining
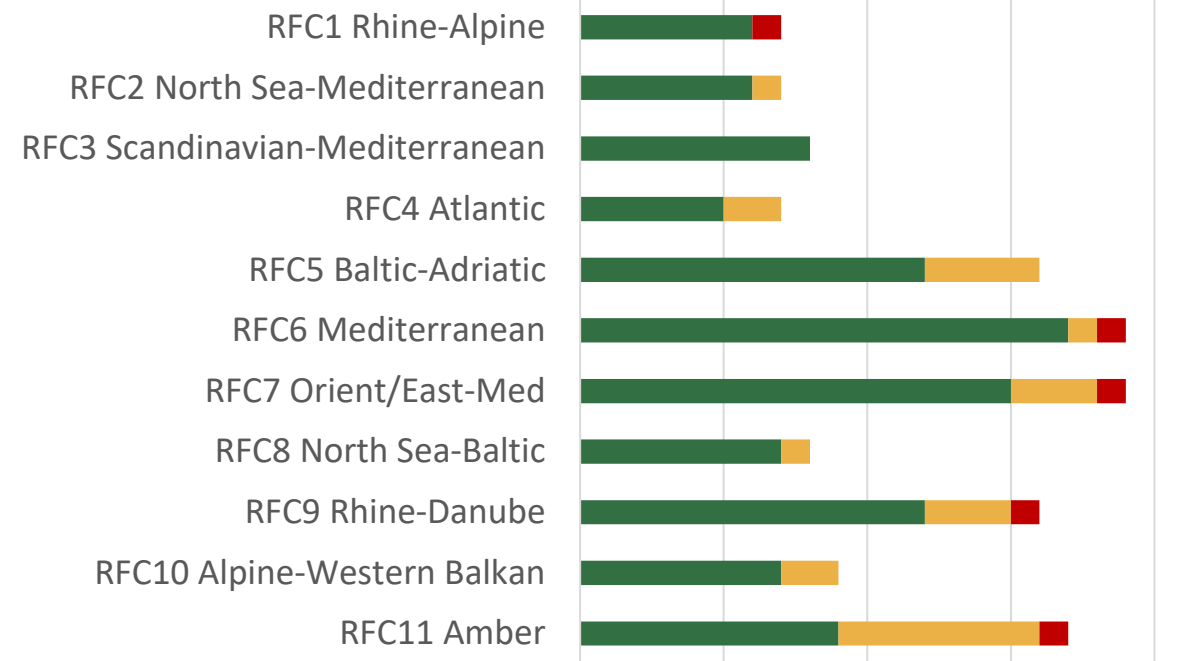
■ Existing/new operations growing   ■ Existing operations stable

■ Existing operations declining

Experienced and expected traffic trends on corridors according to the trains served at terminals, crossing at least one border crossing point(s) in any RFCs

EXPERIENCED VARIATION SINCE 2013

N. of respondents

■	Existing/new operations growing
■	Existing/new operations stable
■	Existing/new operations declining

EXPECTED VARIATION UNTIL 2030

N. of respondents

■	Existing/new operations growing
■	Existing operations stable
■	Existing operations declining

Type of trains operated by railway undertakings or served at terminals crossing at least one border crossing point(s) in any RFCs
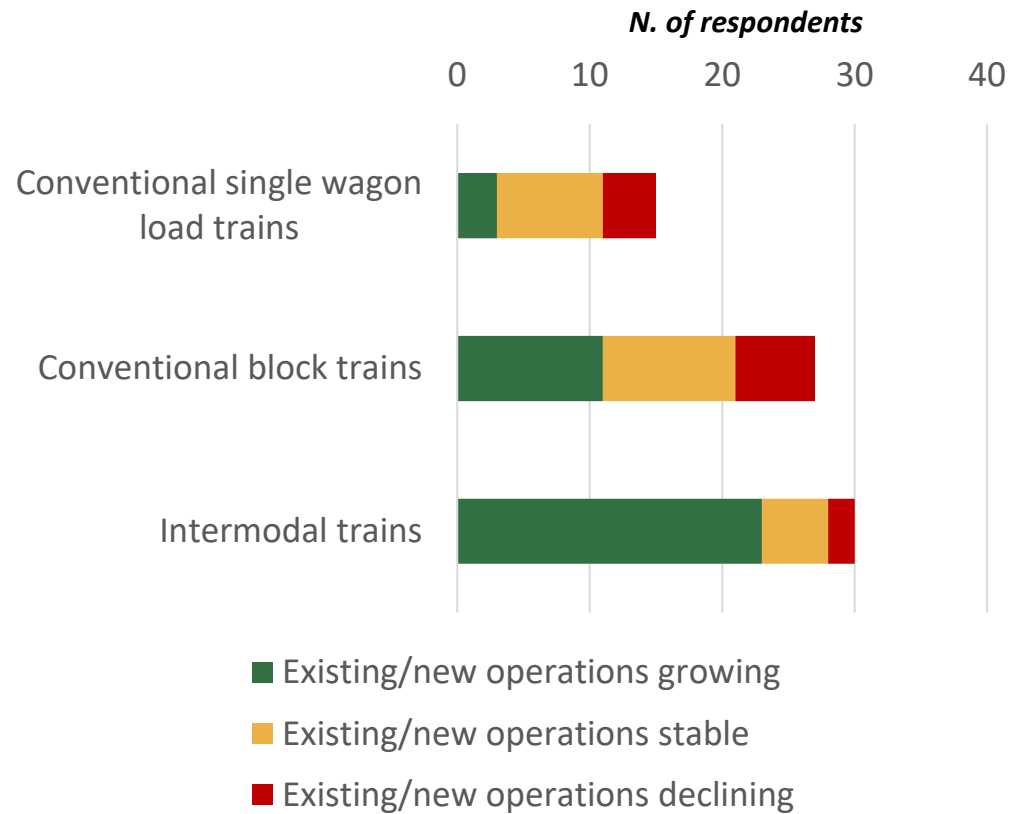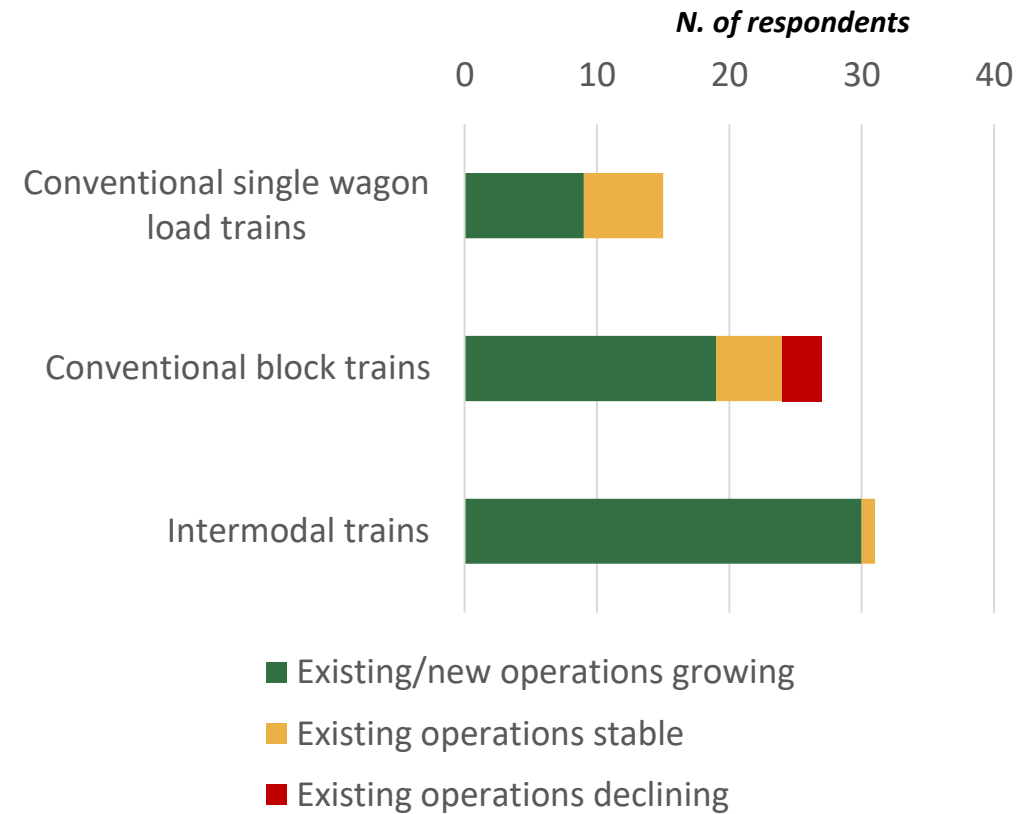

N. of respondents
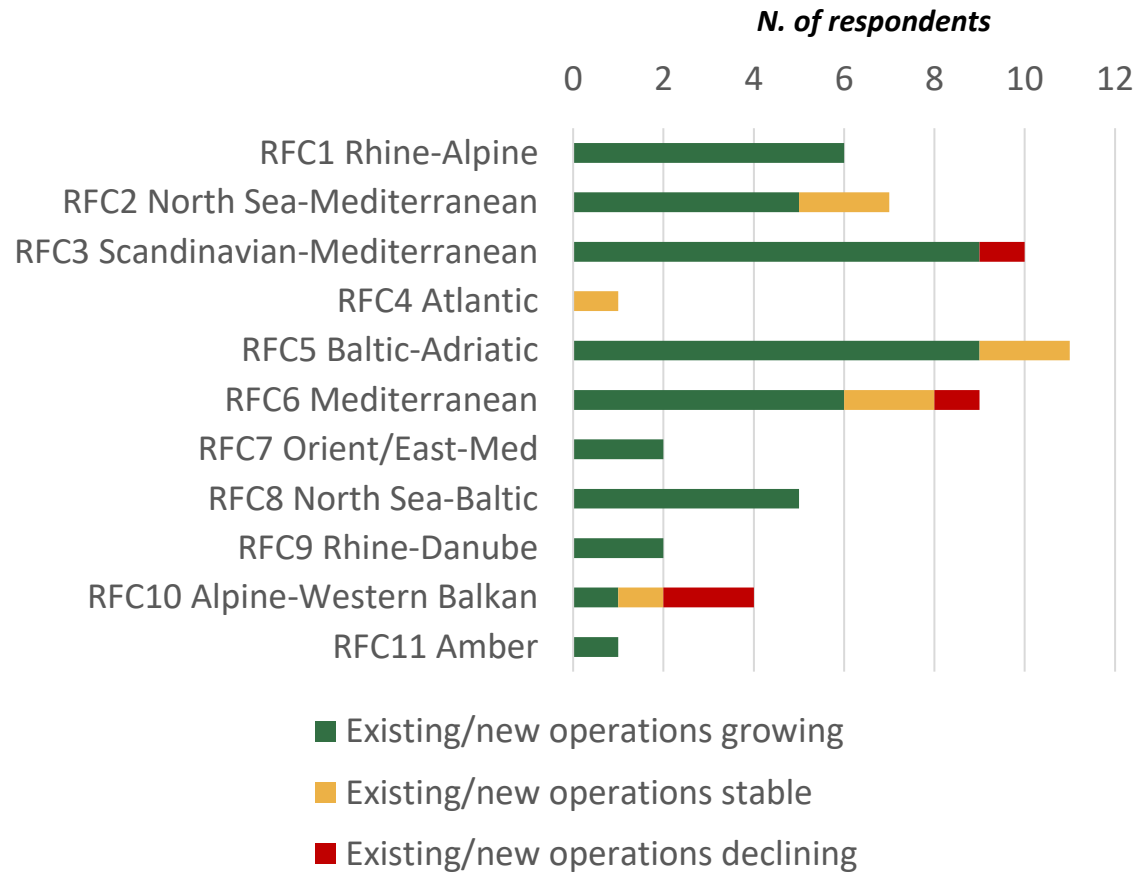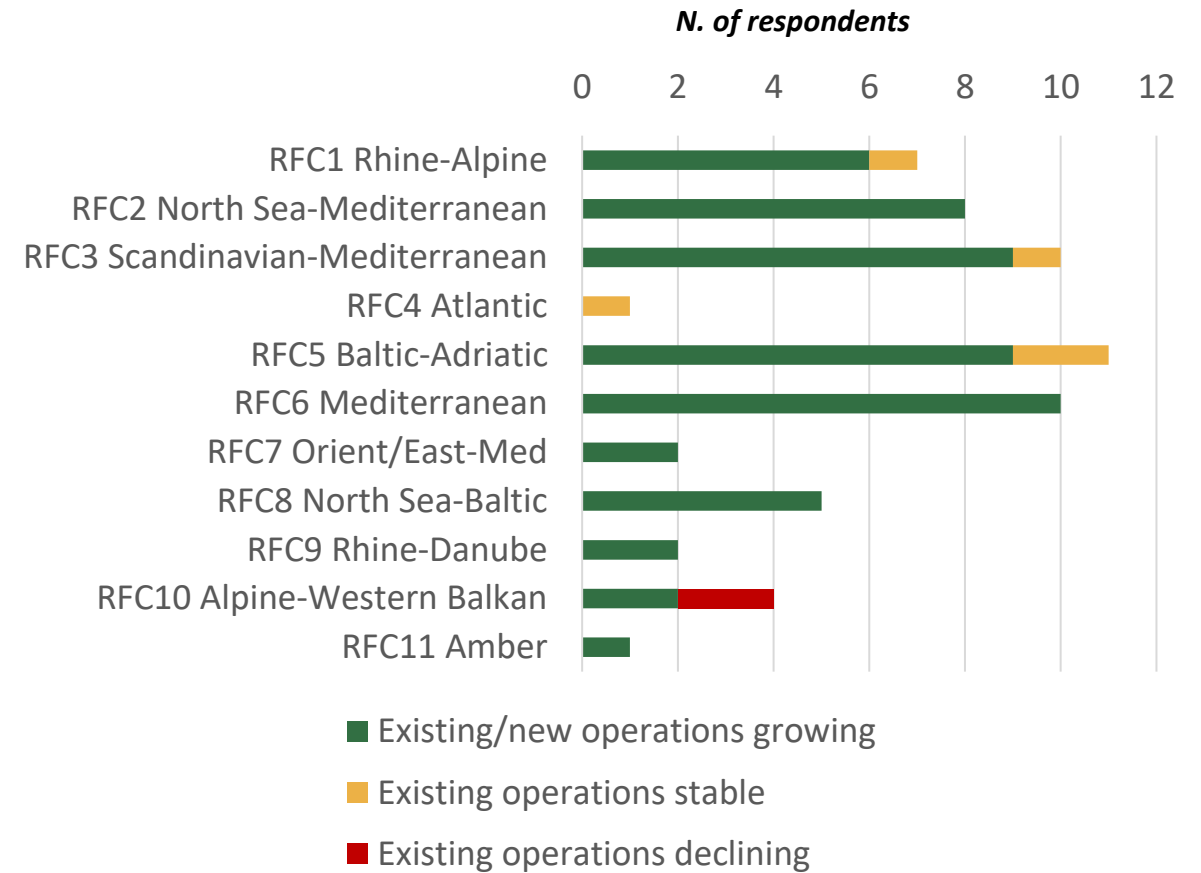
Legend: ■ Railway Undertakings ■ Terminals

Categories: Intermodal trains, Conventional block trains, Conventional single wagon load trains

Ranking of type of trains operated by railway undertakings or served at terminals crossing at least one border crossing point(s) in any RFCs

Experienced and expected traffic trend on the type of trains operated by RUs crossing at least one border crossing point(s) in any RFCs
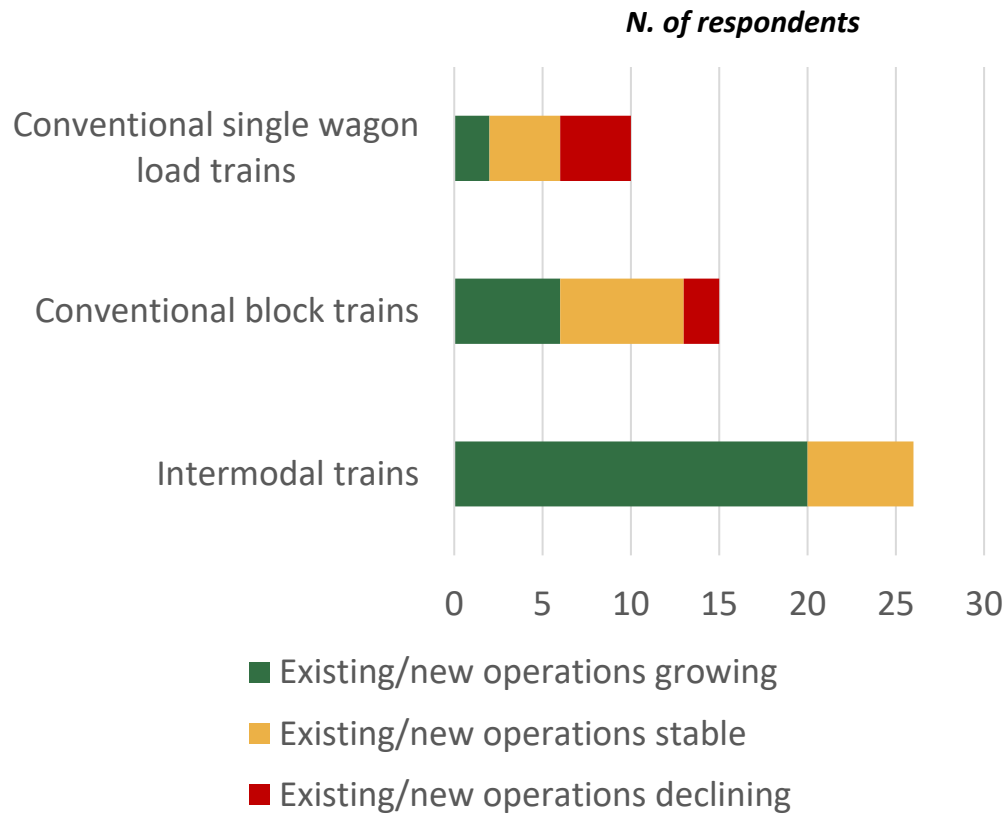
EXPERIENCED VARIATION SINCE 2013

N. of respondents

0   10   20   30   40

- Conventional single wagon load trains
- Conventional block trains
- Intermodal trains

■ Existing/new operations growing
■ Existing/new operations stable
■ Existing/new operations declining

EXPECTED VARIATION UNTIL 2030

N. of respondents

0   10   20   30   40

- Conventional single wagon load trains
- Conventional block trains
- Intermodal trains

■ Existing/new operations growing
■ Existing operations stable
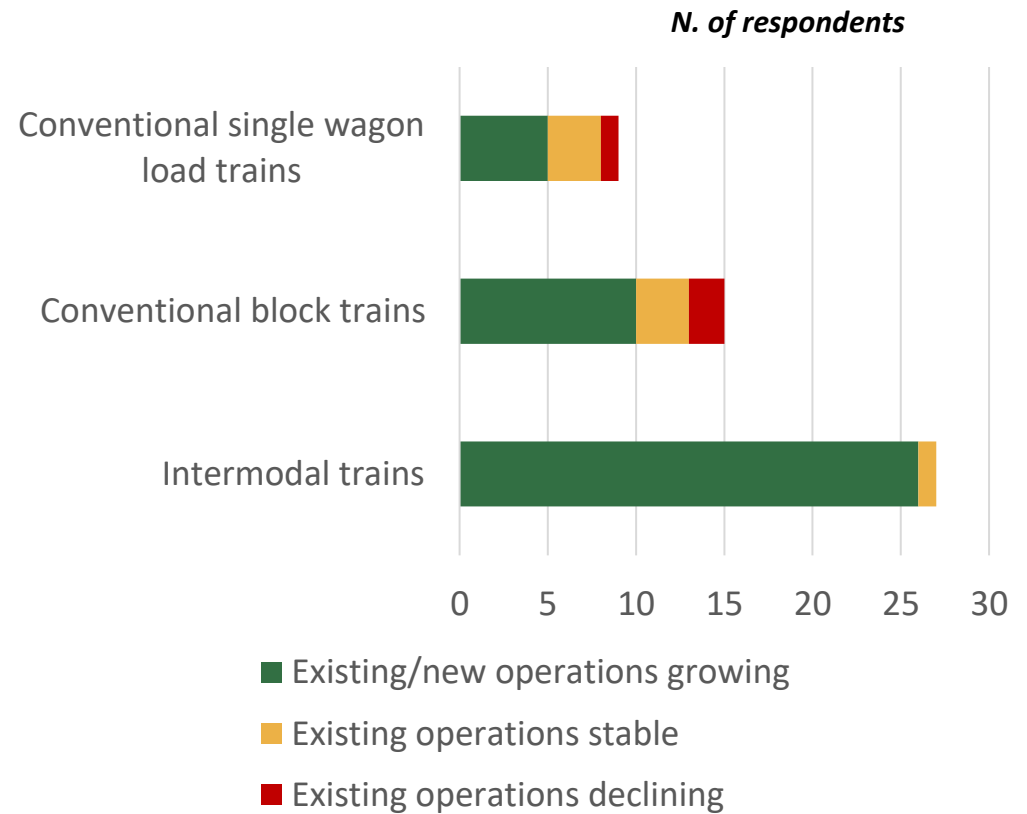■ Existing operations declining
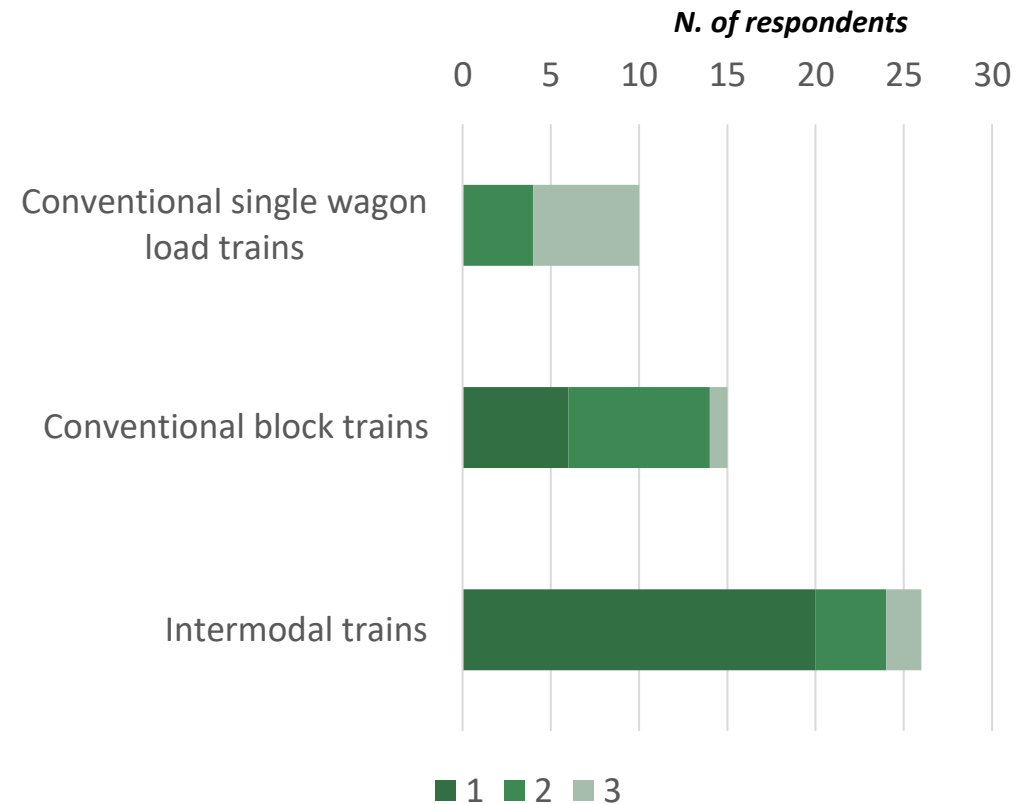
Experienced and expected traffic trend on the type of trains served at terminals crossing at least one border crossing point(s) in any RFCs
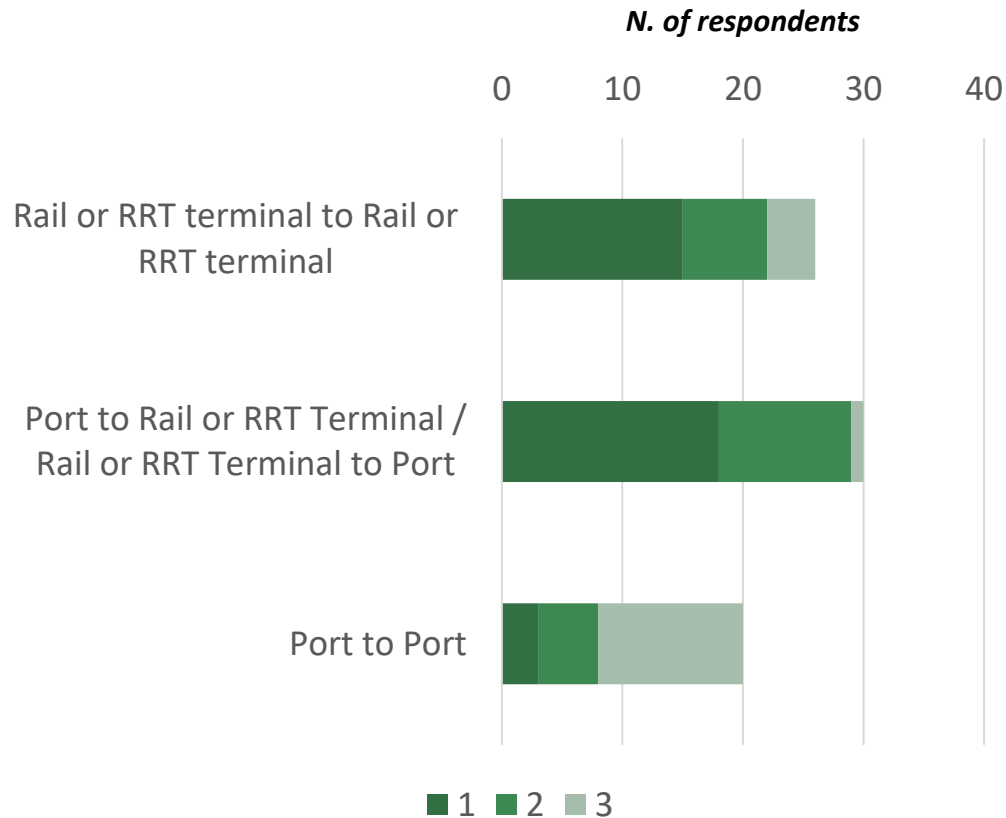
EXPERIENCED VARIATION SINCE 2013

N. of respondents

Conventional single wagon load trains
Conventional block trains
Intermodal trains

0 5 10 15 20 25 30

- ■ Existing/new operations growing
- ■ Existing/new operations stable
- ■ Existing/new operations declining

EXPECTED VARIATION UNTIL 2030

N. of respondents

Conventional single wagon load trains
Conventional block trains
Intermodal trains

0 5 10 15 20 25 30

- ■ Existing/new operations growing
- ■ Existing operations stable
- ■ Existing operations declining

The type of O/Ds of the trains operated by railway undertakings or served at terminals crossing at least one border crossing point(s) in any RFCs
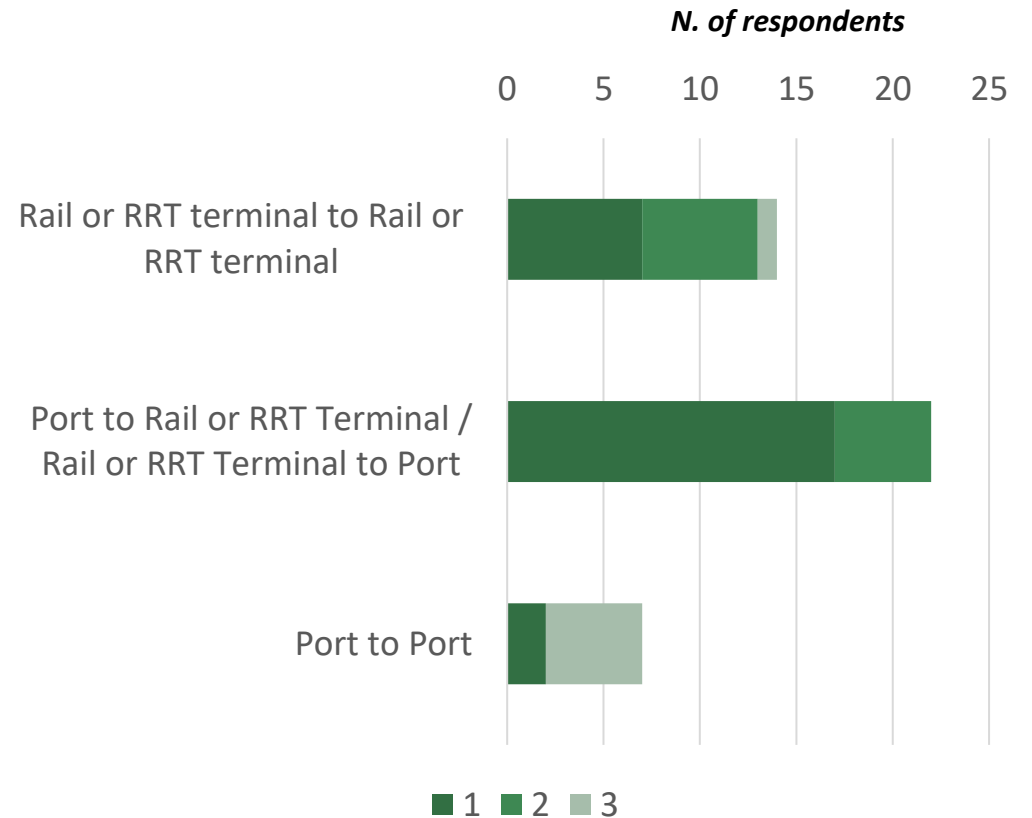

N. of respondents
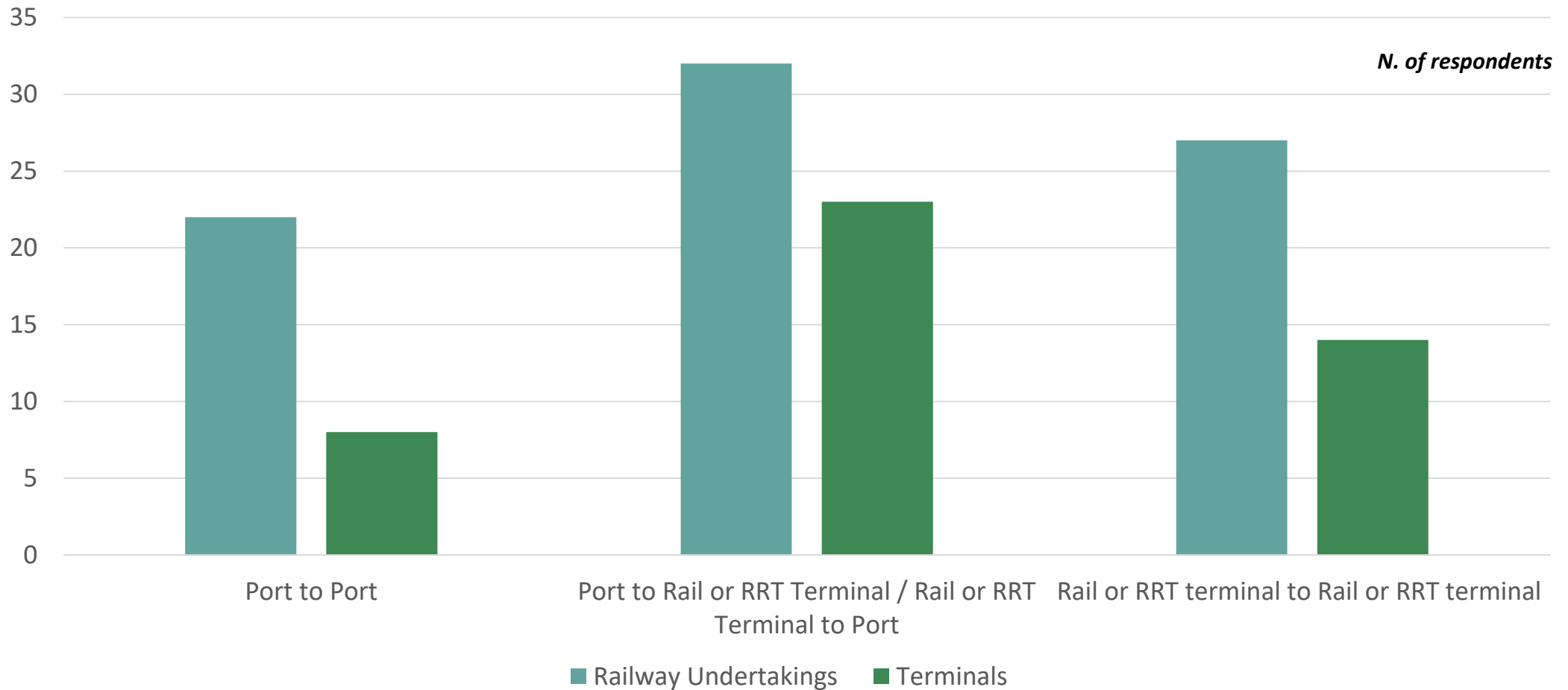
Ranking of the types of O/Ds of the trains operated by RUs or served at terminals crossing at least one border crossing point(s) in any RFCs
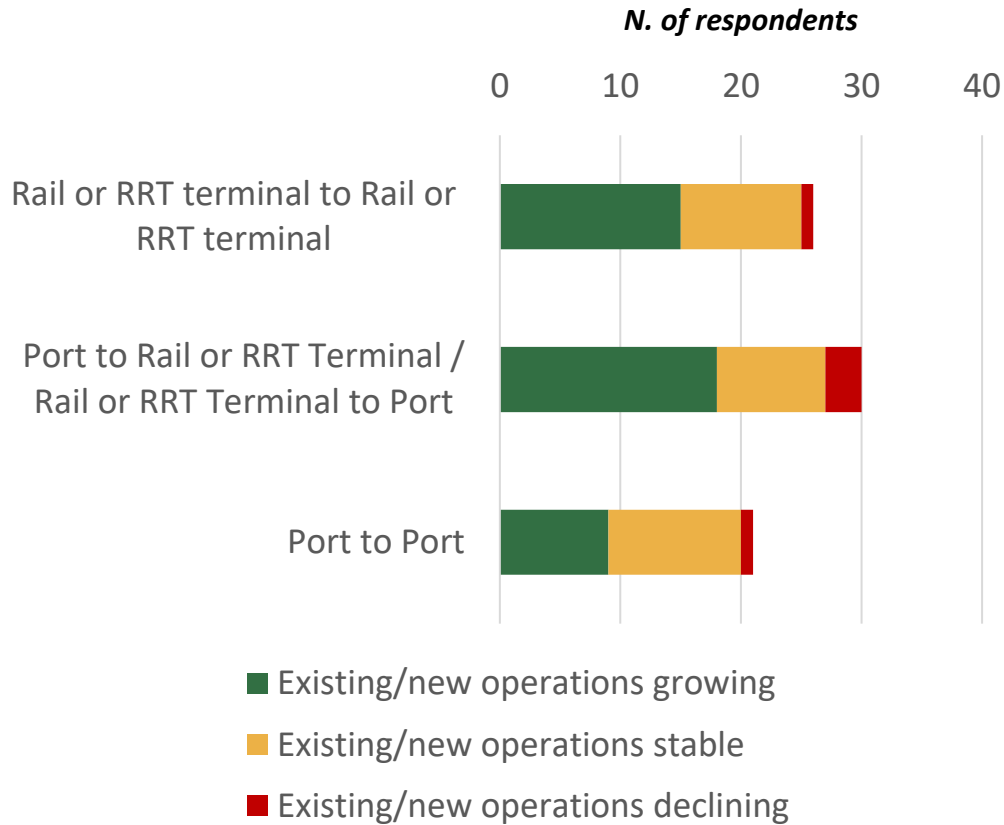
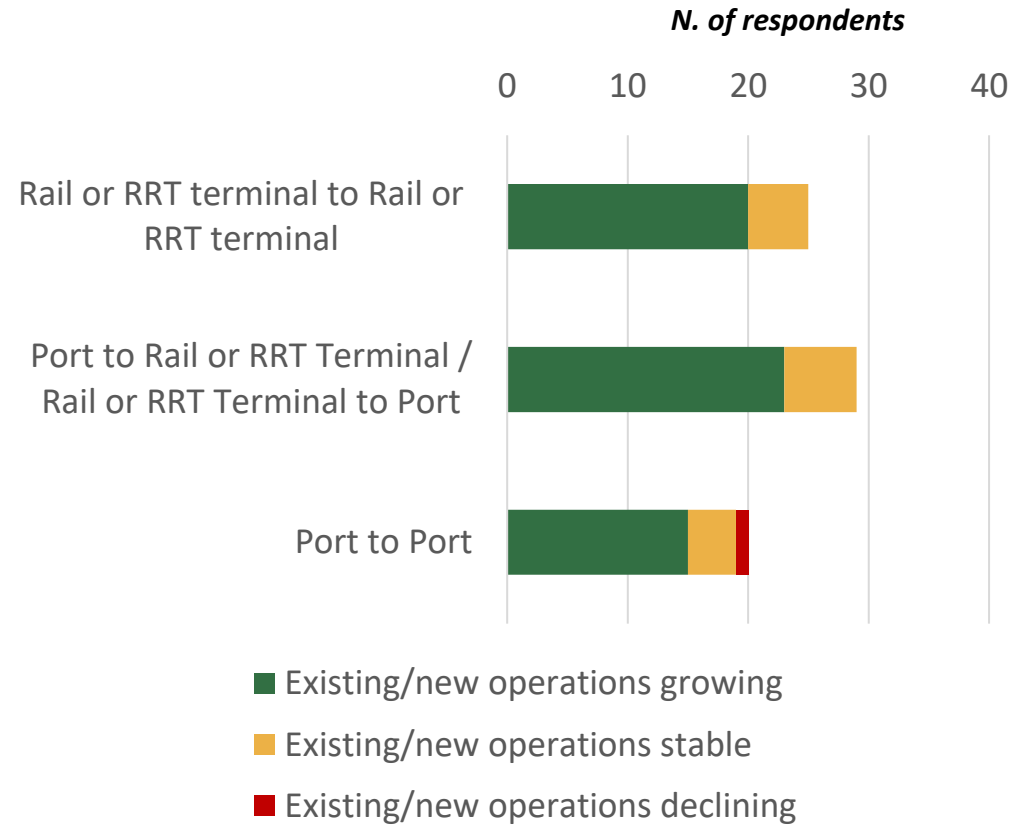## RAILWAY UNDERTAKINGS

TERMINALS

Experienced and expected traffic trend on the type of O/Ds of the trains operated by RUs crossing at least one border crossing point(s) in any RFCs

EXPERIENCED VARIATION SINCE 2013

N. of respondents

- ■ Existing/new operations growing
- ■ Existing/new operations stable
- ■ Existing/new operations declining

EXPECTED VARIATION UNTIL 2030

N. of respondents

- ■ Existing/new operations growing
- ■ Existing/new operations stable
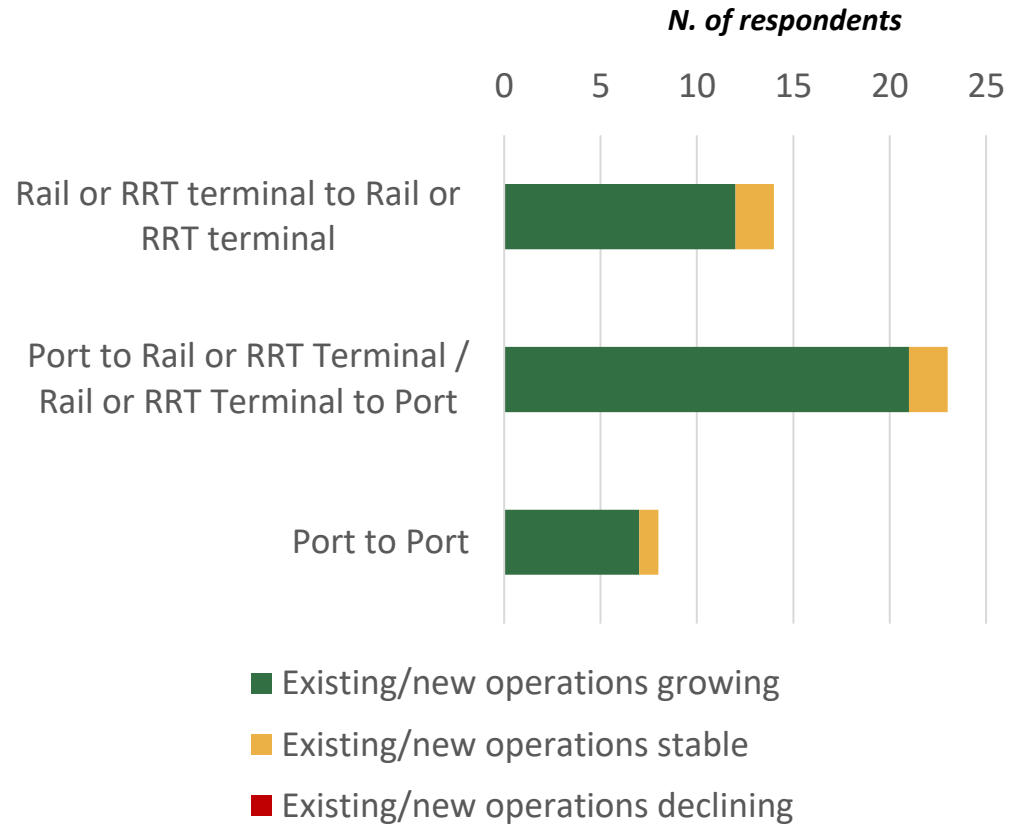- ■ Existing/new operations declining

Experienced and expected traffic trend on the type of O/Ds of the trains served at terminals crossing at least one border crossing point(s) in any RFCs

EXPERIENCED VARIATION SINCE 2013

N. of respondents

EXPECTED VARIATION UNTIL 2030

N. of respondents

- ■ Existing/new operations growing
- ■ Existing/new operations stable
- ■ Existing/new operations declining

Type of distances of the trains operated by railway undertakings or served at terminals crossing at least one border crossing point(s) in any RFCs

N. of respondents
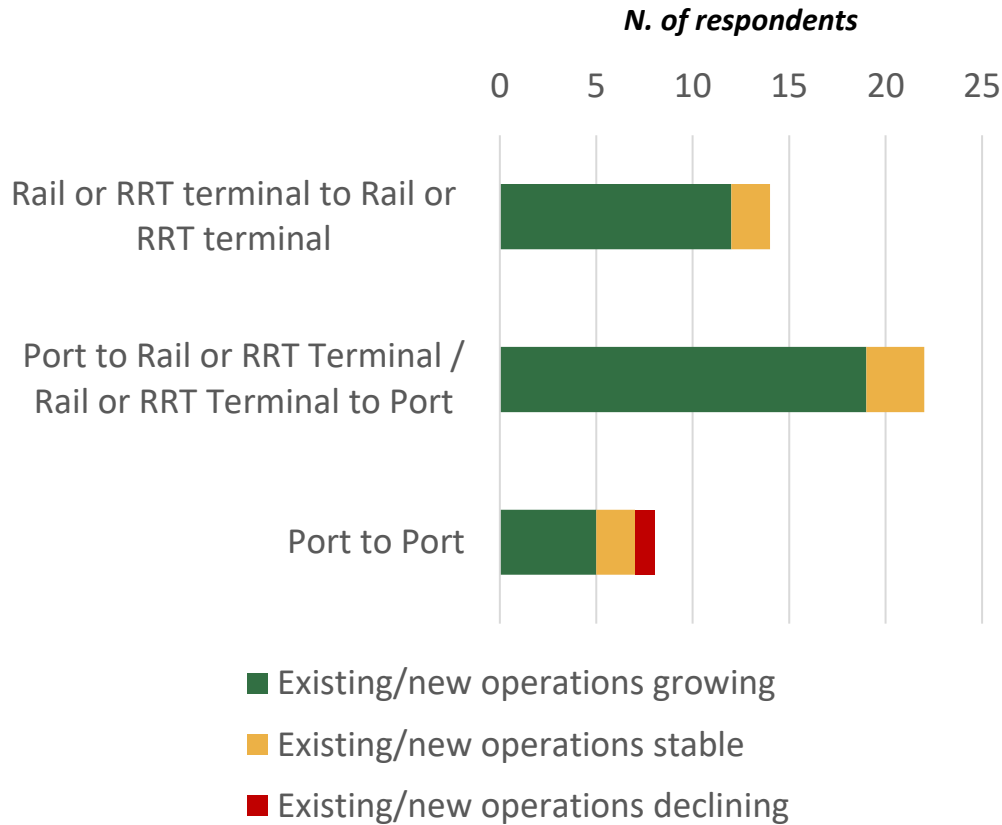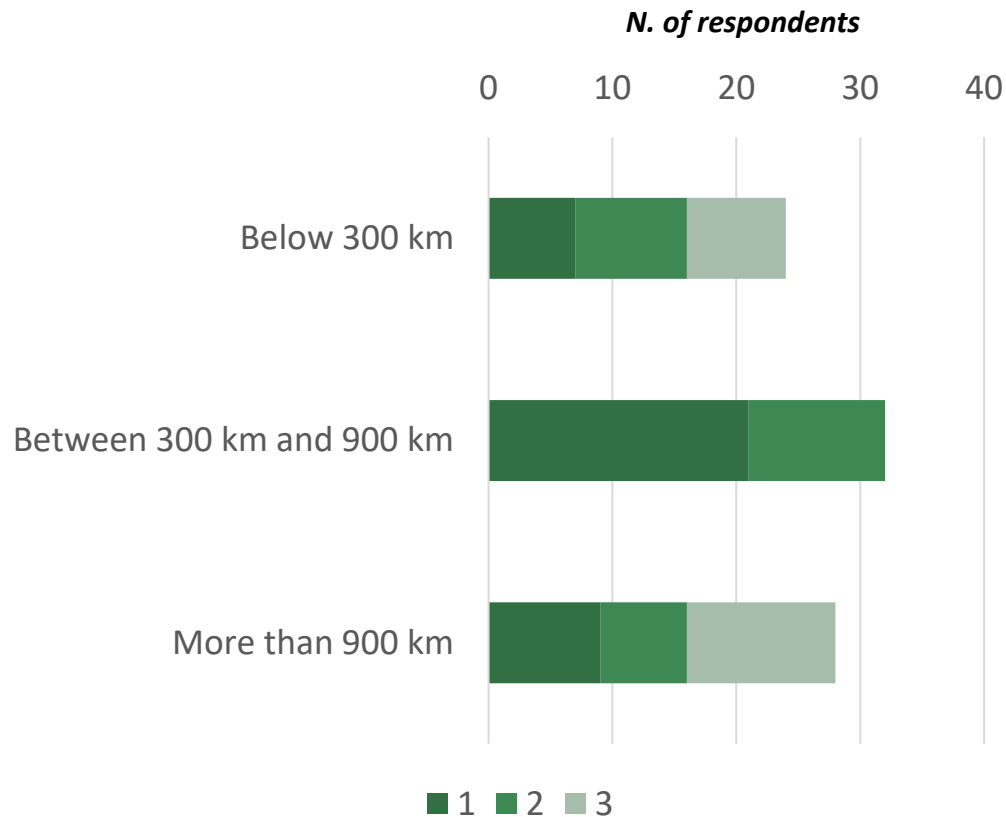
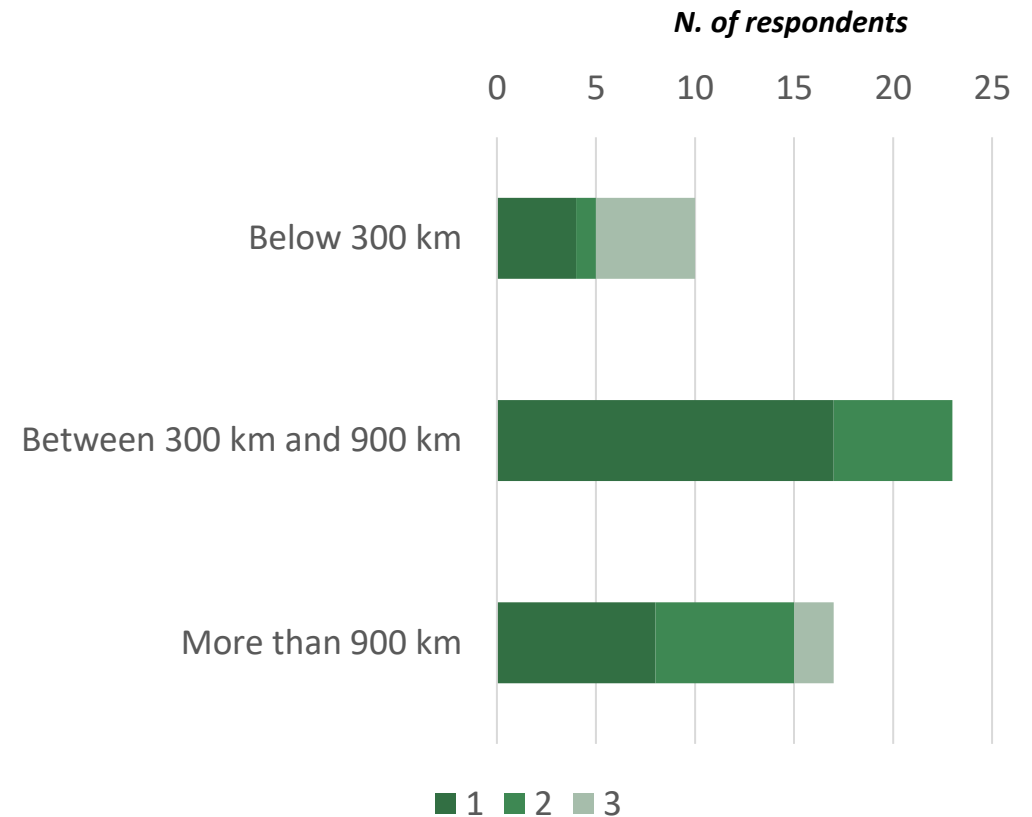Railway Undertakings ■   Terminals ■
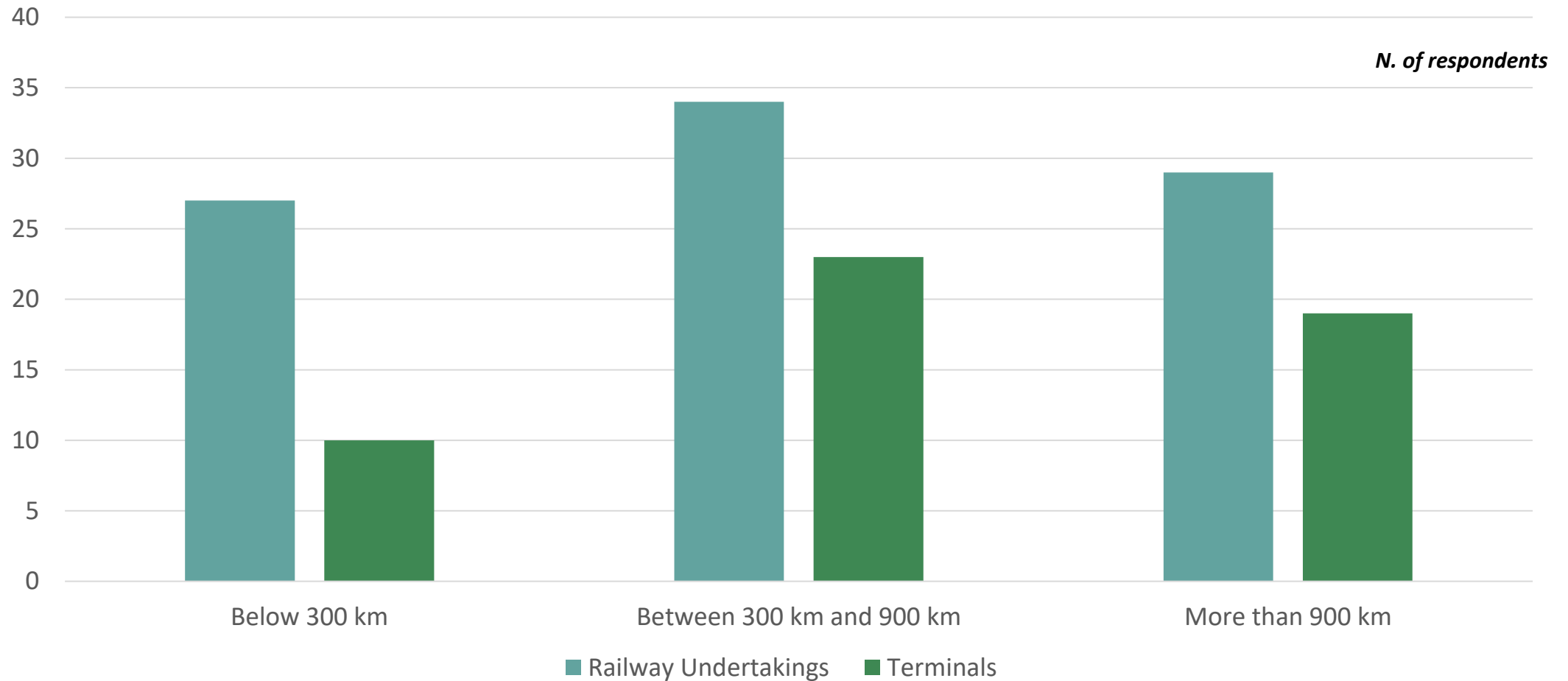
Ranking of types of distances of the trains operated by railway undertakings or served at terminals crossing at least one border crossing point(s) in any RFCs
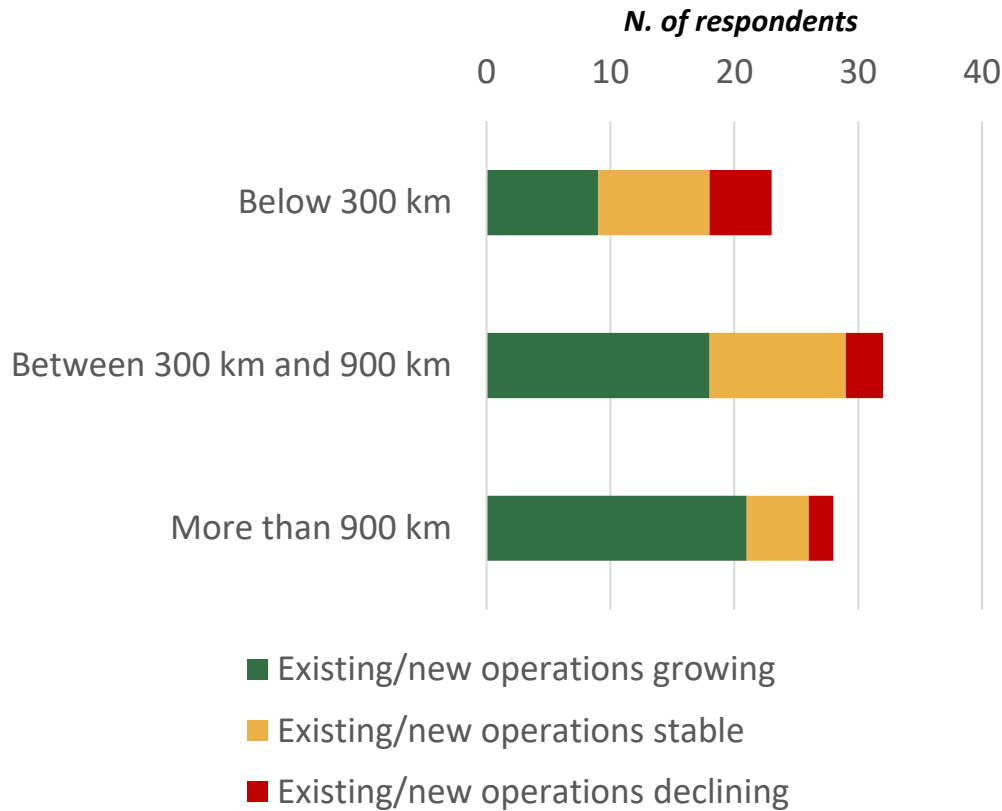
RAILWAY UNDERTAKINGS

N. of respondents

TERMINAL

N. of respondents

Experienced and expected traffic trend on type of distances of the trains operated by RUs crossing at least one border crossing point(s) in any RFCs

EXPERIENCED VARIATION SINCE 2013

N. of respondents

EXPECTED VARIATION UNTIL 2030

N. of respondents

- ■ Existing/new operations growing
- ■ Existing/new operations stable
- ■ Existing/new operations declining

- ■ Existing/new operations growing
- ■ Existing/new operations stable
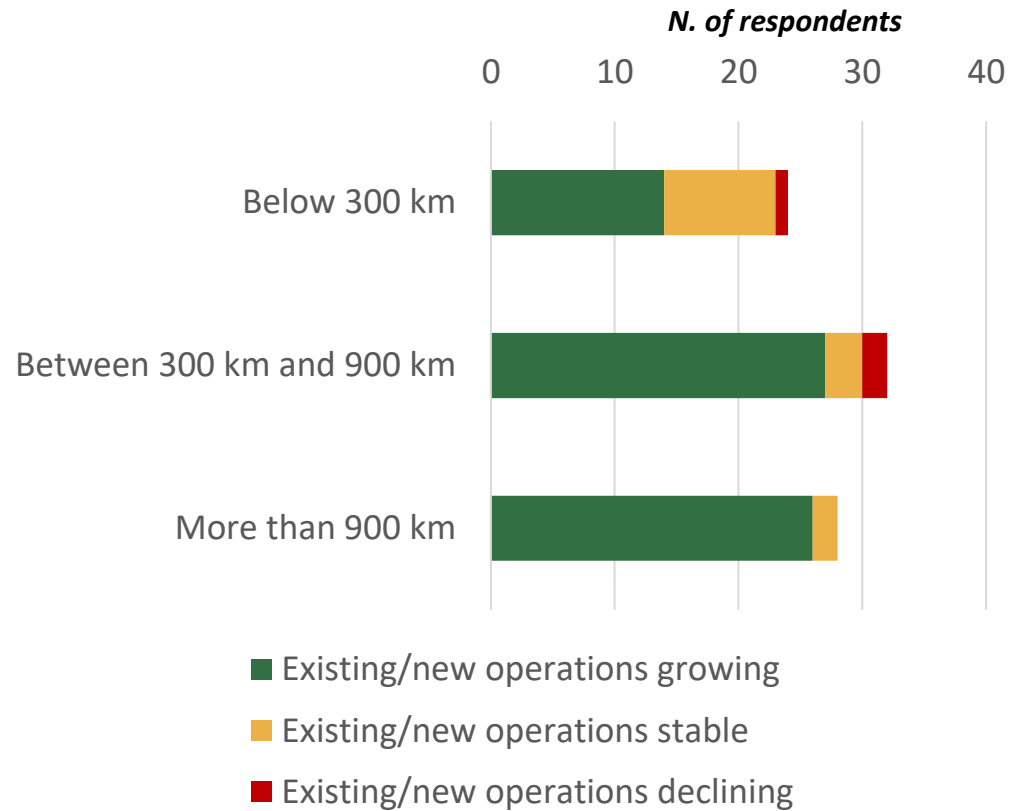- ■ Existing/new operations declining

Experienced and expected traffic trend on type of distances of the trains or served at terminals crossing at least one border crossing point(s) in any RFCs
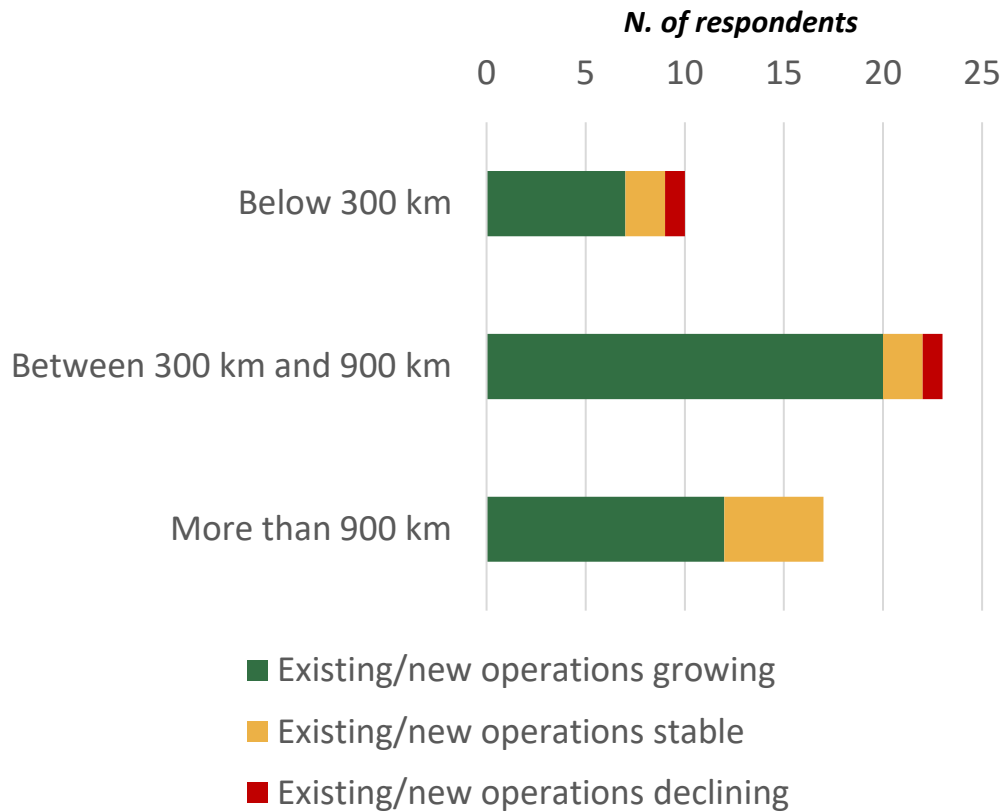
EXPERIENCED VARIATION SINCE 2013

N. of respondents

Below 300 km

Between 300 km and 900 km

More than 900 km

- ■ Existing/new operations growing
- ■ Existing/new operations stable
- ■ Existing/new operations declining

EXPECTED VARIATION UNTIL 2030

N. of respondents

Below 300 km

Between 300 km and 900 km

More than 900 km

- ■ Existing/new operations growing
- ■ Existing/new operations stable
- ■ Existing/new operations declining
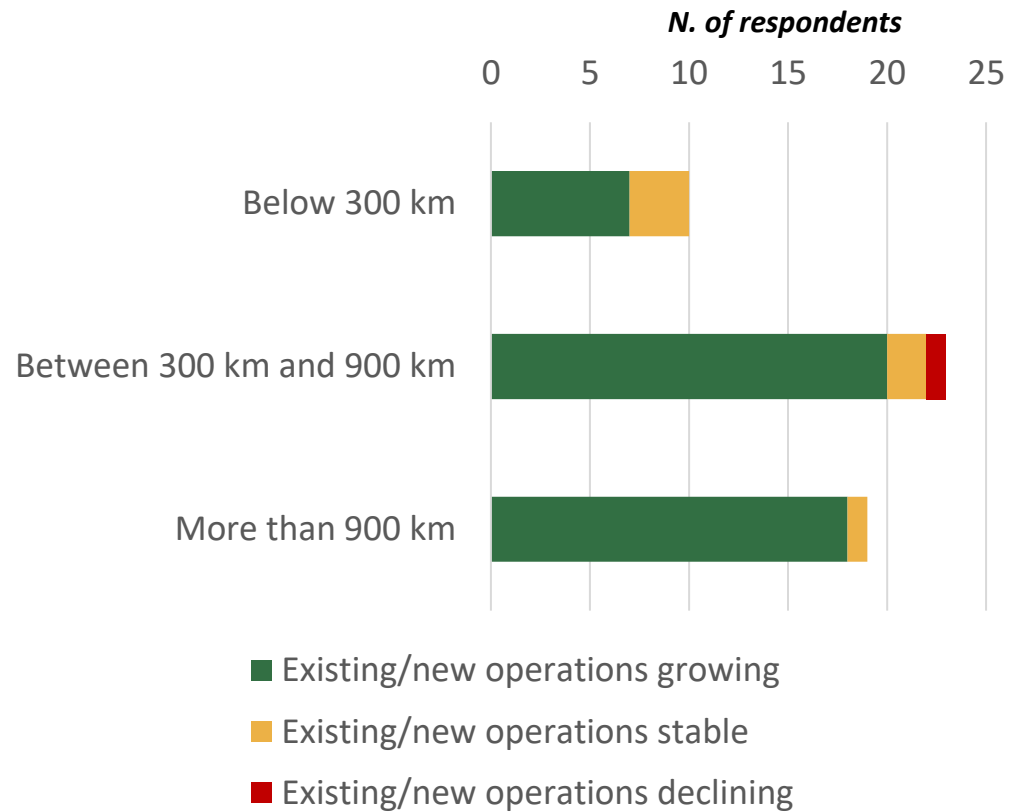
Potential effect of the following market drivers and rank their relevance for the evolution of international rail freight transport in the short term operated by RUs, until 2030

N. of respondents

Chart showing Positive (green) and Negative (red) responses by market driver:

- Policy and economic incentives to promote shift to rail
- Harmonization of procedures and national legislation to improve cross-border operations
- Increased and flexible capacity for international rail freight transport
- Infrustructure developments for interperability
- Increased performance of rail freight services
- Technological improvements for a better integration and increased efficiency of multimodal logistics chains
- Better integrated RFCs and Terminals capacity management
- Socio-economic outlook
- Geopolitical context
- Shortfall of labour force

■ Positive ■ Negative
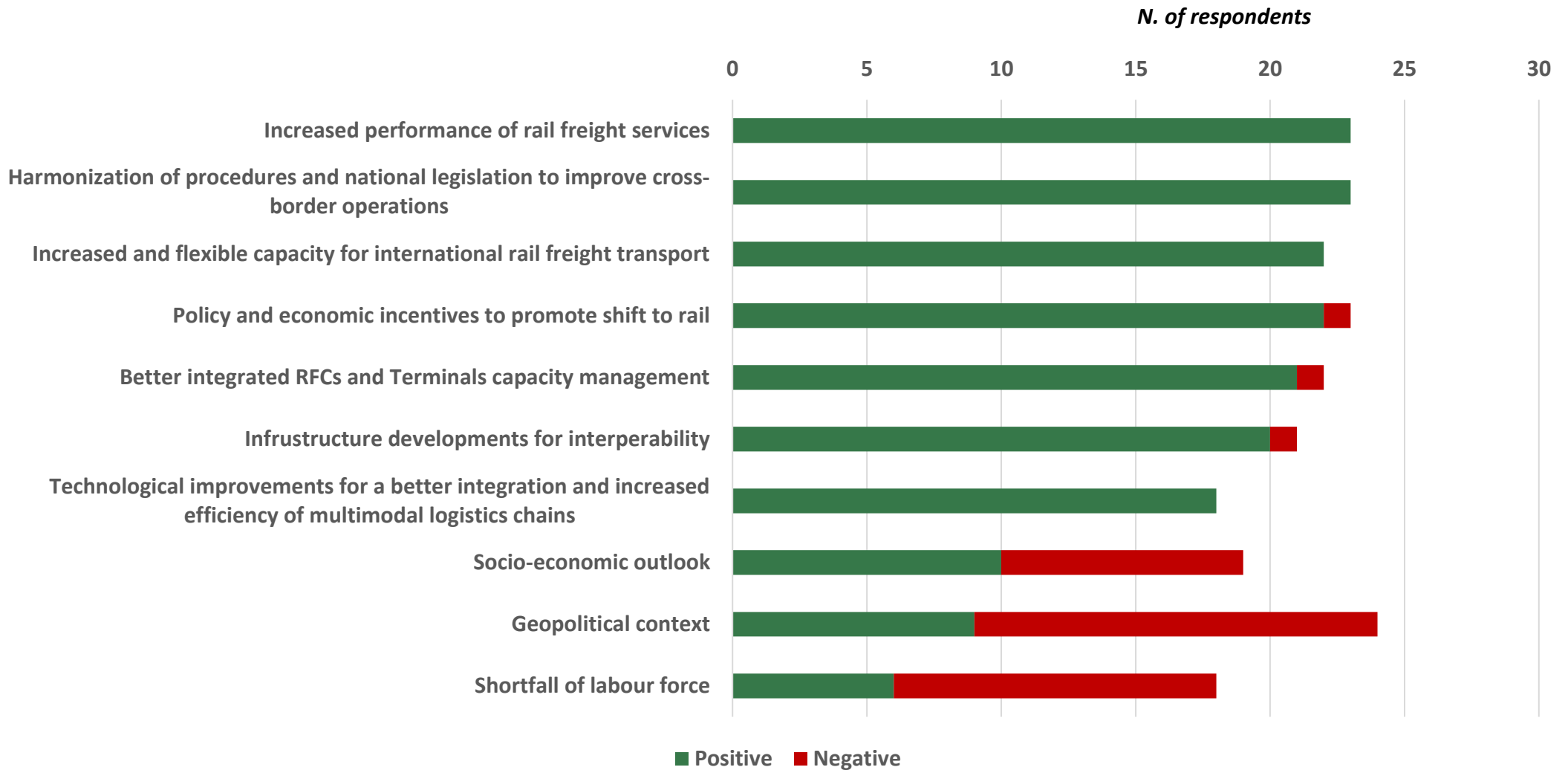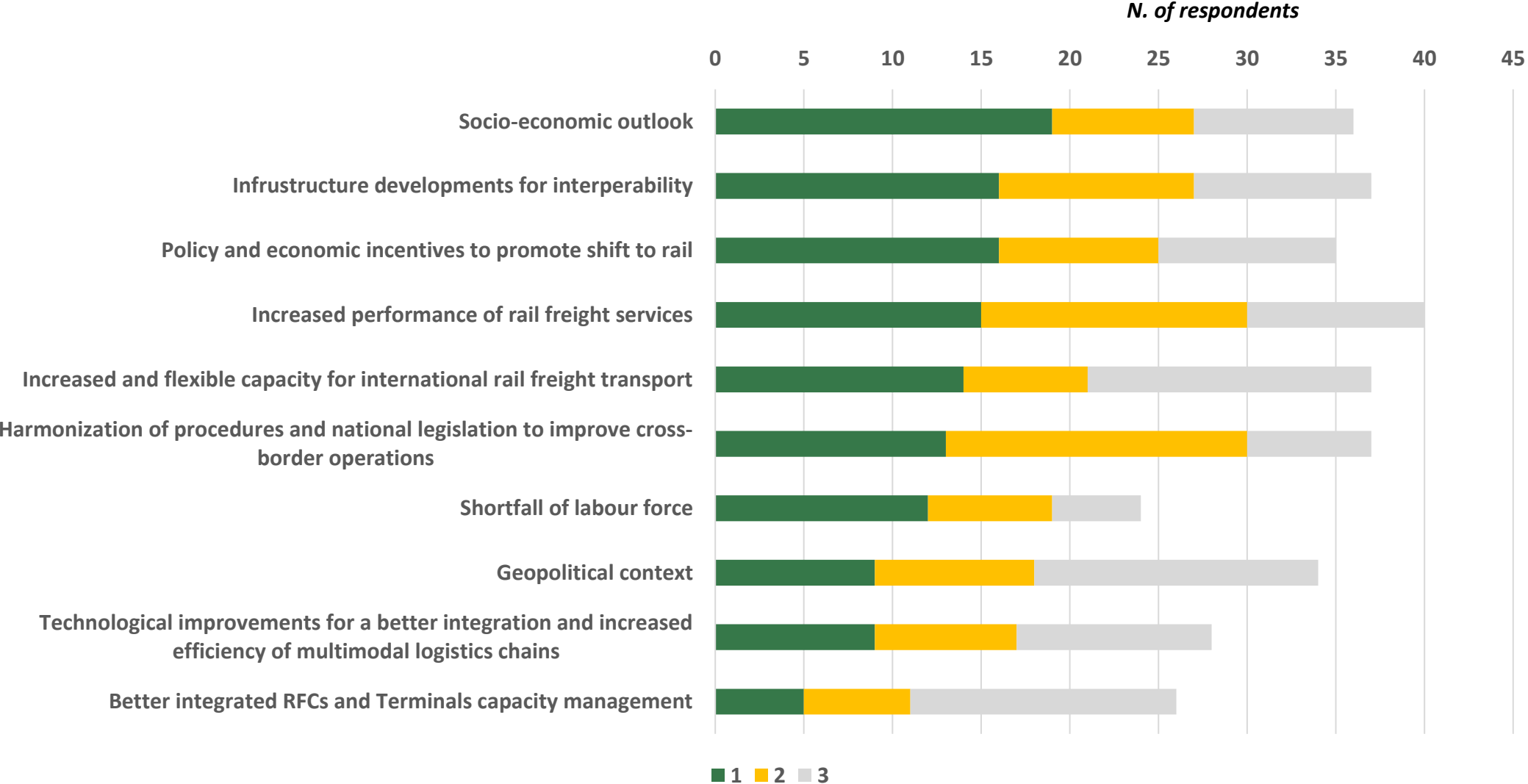
Potential effect of the following market drivers and rank their relevance for the evolution of international rail freight transport in the short term served at terminals, until 2030

N. of respondents

Legend: ■ Positive ■ Negative

Chart categories (top to bottom):
- Increased performance of rail freight services
- Harmonization of procedures and national legislation to improve cross-border operations
- Increased and flexible capacity for international rail freight transport
- Policy and economic incentives to promote shift to rail
- Better integrated RFCs and Terminals capacity management
- Infrustructure developments for interperability
- Technological improvements for a better integration and increased efficiency of multimodal logistics chains
- Socio-economic outlook
- Geopolitical context
- Shortfall of labour force

Ranking of the most relevant short term market drivers for RUs and Terminals

N. of respondents

Legend: ■ 1 ■ 2 ■ 3

Comments on past or future market trends across at least one border crossing point on the RFCs - RUs

High rail infrastructure cost In comparison with road

Currently trend in many countries is, that is not a different between train RFC and "standard" freight train

We hope to see an increase between Munich-Verona in shuttle intermodal trains at the Brenner RFC3 to reduce the impact of road traffic on the environment

European law developments gives the IM more power than RU's - Should be balanced

It's difficult to make forecasts given the current global recession, but we must continue to invest in the European rail network and in new terminals in order to be able to meet market demand in the coming decades
It is above all the Spain-Benelux/Germany route that needs to benefit from substantial work to ensure that it is able to absorb a major increase in volumes over the next few years
And we must not forget the Metz-Strabourg-Basel line, whose tunnels need to be upgraded to P400 gauge so that we finally have an alternative route to alleviate the saturation of the right bank of the Rhine

far better coordination and planning of TCRs with the intention to minimize their impact to RUs

Extensive construction activity in the vicinity of Bad Schandau paralyzes corridor freight transport and detours through Poland are lengthy and expensive

Increased volume for Rijeka Port, RFC 6, RFC 10

Temporary Capacity Restriction should be coordinated more efficient and much more plannable

Longer trains need proper tracks on stations for crossing on singletrack lines; needs parking tracks on stations before border/port stations

The development of the cross-border Forbach-Saarbrücken on the RFC 4 is relevant as SSC is available in DE (until Saarbrücken) and possibly up until the neighbouring station near Saarbrücken; a better coordination of national TCR is also desired

Comments on past or future market trends across at least one border crossing point on the RFCs - Terminals

Reference made to Kombiconsult report on Brenner Corridor Platform
European law development help more the road transportation than rail/combined transport
Cannot give any specific comments, as the entity I am representing is the port authority responsible only for construction/maintenance/management of port infrastructure. Transshipment operations, also involving those related to rail transport of all kind (bulk, intermodal, project cargo), are performed by port operators situated in the port and using the port's infrastructure
In relation to the railway cross-border connection between Spain and France via Le Perthus, the use of the UIC gauge line- with mixed use for freight and passengers at high speed- limits the massive transport of goods. Some limitations are currently being solved (availability of locomotives, opening of the line at night...) but it would be advantageous to segregate freight and passenger transport, adapting the Portbou crossing point to standard gauge
It would be great to harmonize the number system of RFC Corridors and the TEN-T ones
The availability and reliability of rail networks is key for any rail freight development (no stuff shortcome, strikes, interruptions, works, disasters)