

RFC North Sea – Rhine – Mediterranean

ANNUAL REPORT 2025





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FOREWORD

Preparing for a New Start

2025 was a year of change and new beginnings for the Infrastructure Managers, Allocation Bodies and Ministries of Transport forming the new Rail Freight Corridor North Sea – Rhine – Mediterranean (RFC NSRM). With seven countries and eleven different partners, the foundations for further cooperation within the RFC were laid last year.



The participants of the Executive Board meeting in The Hague, December 2025.

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In line with Regulation (EU) 913/2010 (RFC Regulation), as amended by Regulation (EU) 2024/1679 (TEN-T Regulation), the Corridor governance was tasked to bring together the two existing RFCs North Sea – Mediterranean and Rhine – Alpine into the new Rail Freight Corridor North Sea – Rhine – Mediterranean, aligned with the corresponding European Transport Corridor.

The new RFC NSRM spans a geographically diverse and economically significant area of Europe, connecting some of the continent's most critical industrial, logistical and port regions. It stretches from the North Sea ports in the Netherlands, Belgium and France to the Mediterranean ports of Marseille/Fos-sur-Mer in France and Genoa in Italy. Luxembourg, as a central hub, provides efficient links for cross-border freight transport, leveraging its strategic location in Europe. In Germany, the Corridor connects industrial heartlands like the Rhine-Ruhr and Rhine-Main regions to the rest of Europe. Switzerland serves

as a transit country, providing important Alpine crossings for north-south traffic via the two base tunnels Gotthard and Lötschberg.

After having adapted the governance structure, the first big step towards the new Corridor was taken with the publication of the Implementation Plan in July 2025 by the Executive and Management Board, a document that outlines the strategic measures and actions required to enhance the performance, capacity and quality of one of Europe's most vital Corridors. Furthermore, corridor stakeholders were consulted while drafting the Implementation Plan and their feedback was published as part of the document. Together with the Implementation Plan, an overview of the deployment of ERTMS on the Corridor lines was published.

While work on the Implementation Plan was underway, other tasks and duties of the RFC NSRM, such as performance management, coordination of works, international contingency management and the offer of Pre-arranged Paths for the new alignment of the Corridor, were carried out in parallel. The first Pre-arranged Path catalogue for the timetable year 2027 was successfully published in January 2026 by the Corridor One-Stop-Shop, making the RFC NSRM fully operational under the RFC Regulation.

On the operational level, the year proved to be difficult due to several important negative influences. The overall economic situation in mainland Europe did not improve significantly in 2025, leading to stagnation and, in some cases, a slight decline in trains at border points. Furthermore, this situation was underlined by a reduction in coal production driven by environmental concerns, which led to a rapid decrease in coal train volumes, as well as lower car production in European states, resulting in fewer steel and chemical transport. Another factor affecting the overall number of trains was the continued high level of construction works along the Corridor, particularly in Italy and Germany, with further construction works expected in the coming years. Overall, more than 120,000 freight trains operated on RFC NSRM lines in 2025, making this one of the most heavily used areas of the European railway network.

Furthermore, the high utilisation of the Corridor, particularly at the main junctions in metropolitan areas such as Cologne or Milan, is a major negative factor for both the number of freight trains running and their punctuality. In 2025, the exit punctuality on RFC North Sea – Rhine – Mediterranean at the 30 minutes threshold was only 52%, with the difference between entry and exit punctuality being 13%. More on the punctuality and overall performance of the Corridor can be found in Chapter 3 (Performance Report) of this Annual Report.

In order to work together on improving quantity, as well as reliability and quality of the capacity offer, exchanges with the Railway Undertakings were intensified in 2025. The newly formed Railway Undertaking Advisory Group met four times in 2025, focusing on the impact of TCRs and the improvement of cross-border coordination on the Corridor

in cooperation with the Management and Executive Board and on finding common ways forward. Furthermore, the Corridor hosted the second ERTMS event for customers and interested parties in Frankfurt to discuss the future roll-out on the RFC NSRM lines.

This Annual Report provides an overview of the main developments on RFC North Sea – Rhine – Mediterranean, focusing on KPIs, performance and other key topics. We would like to thank everyone involved in the Corridor for their contribution to improved international cooperation and infrastructure in 2025.



Martin von Kaenel

Co-chair of the Executive Board



Pierre Bodiaux

Co-chair of the Executive Board



Martin Cygon

Managing Director



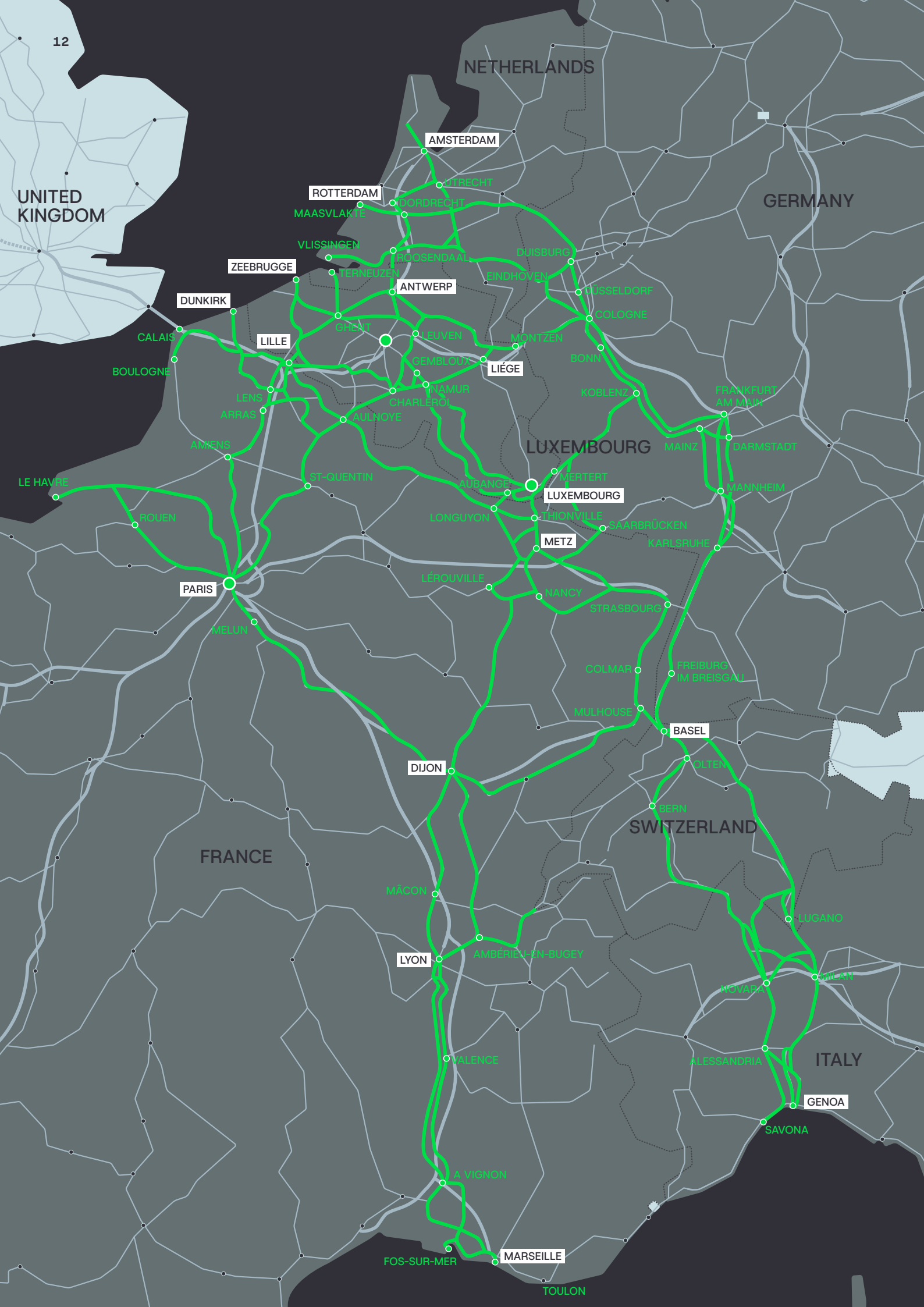
Guus de Mol

Chair of the Management Board



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About RFC NSRM



UNITED KINGDOM

NETHERLANDS

GERMANY

AMSTERDAM

ROTTERDAM

UTRECHT

MAASVLAKTE

VLISSINGEN

ZEEBRUGGE

DUNKIRK

CALAIS

BOULOGNE

LILLE

ORCHY

LENS

ARRAS

ARRAS

LE HAVRE

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PARIS

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LENOUVILLE

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COLMAR

MULHOUSE

BASEL

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OLTEN

BERN

SWITZERLAND

MÂCON

LYON

AMBERG-WEIMAR

VALENCE

LA VIGNON

FOS-SUR-MER

MARSEILLE

TOULON

FRANKFURT AM MAIN

MAINZ

DARMSTADT

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Figure 01
Map of RFC
North Sea – Rhine – Mediterranean

Following the entry into force of the revised TEN-T Regulation and the integration of the Corridors Rhine – Alpine and North Sea – Mediterranean into the European Transport Corridor NSRM, the alignment of the corresponding RFC also needed to be adapted, as from now the rail freight lines of the ETC constitute the new RFC.

RFC North Sea – Rhine – Mediterranean passes through 7 countries and covers 22 border crossings in the heart of the European industry. It spans a geographically diverse and economically significant area of Europe, connecting some of the continent's most critical industrial, logistical and port regions. It stretches from the North Sea ports in the Netherlands, Belgium and France to the Mediterranean ports of Marseille / Fos-sur-Mer in France and Genoa in Italy. Luxembourg, as a central hub, provides efficient links for cross-border freight transport, leveraging its strategic location in Europe. In Germany the Corridor connects industrial heartlands like the Rhine-Ruhr and Rhine-Main regions to the rest of Europe. Switzerland serves as a transit nation, providing important Alpine crossings for north-south traffic via the two base tunnels Gotthard and Lötschberg.

RFC North Sea – Rhine – Mediterranean consists not only of the routes previously belonging to the RFCs Rhine – Alpine and North Sea – Mediterranean, but also includes new routes. These new routes include, among others, the Koblenz-Trier-Saarbrücken connection in Germany, the line between Luxembourg city and Wasserbillig in Luxembourg, Le Havre-Rouen-Paris and Paris-Dijon in France, as well as the Seregno-Novara line from Ferrovienord in Italy (see figure 01). Ireland, being a part of the European Transport Corridor, used the exemption not to join the Management Board of the RFC, but chose to act as an observer in the Executive Board of the Rail Freight Corridor.

The Corridor links the involved countries into an integrated network that drives trade, supports economic growth, and enables sustainable freight transport solutions across the continent. In total, over 120,000 freight trains run on the RFC NSRM each year, making it one of the busiest stretches of the European rail network. Also, the border between Germany and Switzerland in Basel is the most heavily used border crossing in Europe, with over 35,000 freight trains crossing the border in 2025. The industries located along the RFC, namely automotive, pharmaceuticals, chemicals and mechanical engineering, are typical customers for freight trains.

1.1 // Organisation

The governance of RFC NSRM consists of the Executive Board, the Management Board and the Advisory Groups.

The Executive Board (ExBo) consists of the representatives of the respective Transport Ministries from the countries involved and makes key decisions regarding the strategy and the cooperation on the Corridor.

The Executive Board is co-chaired by Pierre Bodiaux (Federal Office of Traffic and Transport, Belgium) and Martin von Kaenel (Federal Office of Transport, Switzerland).

Currently, the Executive Board consists of the following national representatives:

- Hinne Groot, Ministry of Infrastructure and Waterways (the Netherlands)
- Caroline Avaux, Federal Public Service Mobility and Transport (Belgium)
- Séléna Rigaut, Directorate-General for Infrastructure, Transport and Mobility, Ministry of Ecological Transition and Territorial Cohesion (France)
- Lara Elsen, Federal Ministry of Transport (Germany)
- André Bissen, Ministry of Mobility and Public Works (Luxembourg)
- Matthias Wagner, Federal Office of Transport (Switzerland)
- Sara Cavallo, Ministry of Infrastructures and Transport (Italy)

Additionally, as Ireland is part of the European Transport Corridor North Sea-Rhine-Mediterranean, the Department of Transport of Ireland has decided to be an observer in the Executive Board.



The members and co-chairs of the Executive Board of RFC NSRM in The Hague, December 2025, from left to right: Martin von Kaenel, André Bissen, Caroline Avaux, Matthias Wagner, Séléna Rigaut, Pierre Bodiaux, Sara Cavallo, Lara Elsen, Hinne Groot

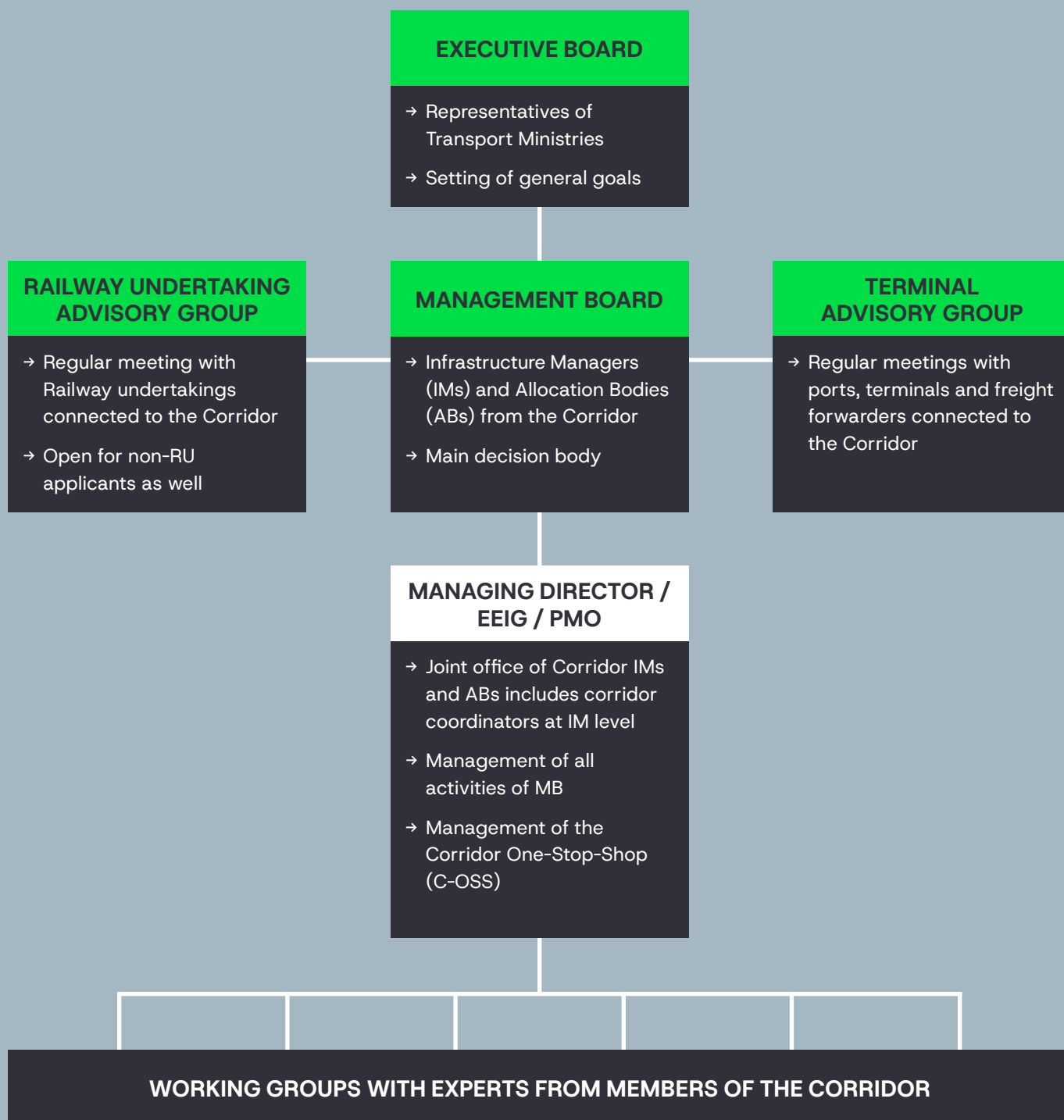


Figure 02

Organisation of the Corridor

■ Bodies according to RFC Regulation

■ Structure decided by MB

The Management Board (MB), consisting of high-level management representatives from the eleven IMs and ABs involved, steers the work of the Corridor and prepares proposals for the decision-making by the ExBo. The MB defines the Corridor's strategic direction and ensures effective cooperation among all participating IMs/ABs. It also oversees the implementation of the RFC Regulation. The MB was officially established in June 2025 and included a new member that had not been part of the two former Corridors, namely Ferrovienord.

The Management Board is chaired by Guus de Mol (ProRail) and the position of Vice Chair is held by Britta Schreiner (CFL).

Additionally, the MB decided to establish an EEIG (European Economic Interest Grouping) Corridor North Sea – Rhine – Mediterranean, a legal entity with its registered seat in Luxembourg, to support its activities. The responsible Infrastructure Managers (IMs) and Allocation Bodies (ABs) of the Corridor countries are members or contractors of the EEIG's General Assembly. The EEIG was officially registered in October 2025.

The Corridor One-Stop-Shop (C-OSS), facilitates train path management for international rail freight. It serves as a single point of contact allowing applicants to request and receive answers regarding infrastructure capacity for international freight trains on the Corridor. The Corridor One-Stop-Shop is operated by Stephanie Bscheid (DB InfraGo AG) and Jean Quaeyhaegens (Infrabel) in the role of C-OSS Managers.

The PMO, led by the Managing Director, oversees the goals and activities of the dedicated Corridor Working Groups and acts as a joint office of the Infrastructure Managers and Allocation Bodies involved. The position of Managing Director is held by Martin Cygon (DB InfraGo AG). Within RFC North Sea – Rhine – Mediterranean, IMs and ABs have also introduced Programme Managers on a voluntary level to support coordination at IM/AB level, in cooperation with the Permanent Team.

As 2025 was a transitional year, moving from two RFCs into the new RFC NSRM, several personnel changes occurred. Marc Adler, former Managing Director of RFC

Rhine – Alpine, stepped down at the end of April and was succeeded by Martin Cygon who was subsequently appointed Managing Director of RFC North Sea – Rhine – Mediterranean in September 2025. Yann Le Floc'h, the Managing Director of RFC North Sea – Mediterranean, left his position at the end of November, having also served as the Managing Director of RFC NSRM until that time. Sibel Ozcan was appointed Deputy Managing Director, effective 1 of December 2025. Matthieu Maeselle, a long-standing member of the RFC NSM corridor team, also left in June 2025.

The Railway Undertaking Advisory Group (RAG) and the Terminal Advisory Group (TAG) act as advisory bodies to the Management Board. With the amended RFC Regulation, their role has been enhanced. They are consulted and may provide opinions on the Corridor performance, as well as on infrastructure development and investment needs. These platforms facilitate the involvement of Railway Undertakings (RUs) and non-RU applicants, terminal operators and other stakeholders in the intermodal transport chain, ensuring that their opinions and requirements are considered in the Corridor's development from a user-centric perspective.

Both groups are chaired by Co-Speakers elected among the participating representatives. Both Advisory Groups have agenda slots in the meetings of the Executive Board and Management Board of RFC North Sea – Rhine – Mediterranean.

Following the entry into force of the revised TEN-T Regulation, the European Commission nominated new Coordinators for the newly defined European Transport Corridors (ETC). Prof. Paweł Wojciechowski was appointed European Coordinator for the North Sea – Rhine – Mediterranean ETC in September 2024. He oversees the development and implementation of key investment projects on the ETC as described in his Work Plan for all transport modes, that includes e.g. monitoring the progress of the TEN-T parameters, infrastructure developments and advice to the Member States in view of reaching the targets and priorities of the Corridor. He also organizes, twice a year, a Corridor Forum (see section 1.5) where developments on the ETC are shared with public stakeholders.

Members of the Management Board



Guus de Mol
ProRail



Britta Schreiner
CFL



Michel Geubelle
Infrabel



Floraine Stauffer
TVS



Claude Mahowald
ACF



Claire Hamoniau
SNCF Réseau



Oliver Sellnick
DB InfraGO



Roger Beutler
BLS Netz



Andrea Galluzzi
RFI



Stephan Schenk
SBB Infrastruktur



Marco Barra Caracciolo
FERROVIENORD

1.2 // Executive Board

1.2.1 // Activities of the Executive Board in 2025

In preparation of the creation of the new RFC NSRM, the Ministers in charge of Transport of the countries part of the North Sea – Mediterranean and Rhine – Alpine corridors signed a ministerial arrangement in December 2024 establishing the new Executive Board (ExBo) as of 1 January 2025. The new ExBo has continued the activities of the two former ExBos, related to the implementation of the RFC Regulation and the TEN-T Regulation. It has also pursued the orientations set out in the strategic objectives newly defined in 2025, which specify the policy goals of the ExBo. The main strategic objectives of ensuring compliance with the TEN-T Regulation and the deployment of ERTMS along the Corridor remain unchanged. The coordination of TCRs and cooperation with the European Coordinator also continues to be key strategic objectives.

1.2.1.1 // REGULAR TOPICS ADDRESSED

The TEN-T Regulation stipulates that the Rail Freight Corridors (referred to as “rail freight governance” in the Regulation) should address two new operational priorities, linked to the dwelling time at border sections and arrival punctuality. The Executive Board discussed the implementation of a common methodology for all RFCs regarding the application of these two operational priorities. This methodology was also approved by the Network of Executive Boards (NExBo). Another objective arising from the TEN-T Regulation concerns the operation of 740-meter trains. The ExBo will continue discussing these topics during 2026. Also, a new Framework for Capacity Allocation for RFC North Sea – Rhine – Mediterranean was signed in 2025 for the allocation of capacity for timetable 2027.

The ExBo further addressed the need for a smooth transition to the new organisational structure foreseen by the proposed Regulation on the use of railway infrastructure capacity in the single European railway area (see chapter 2.1 – Rail Capacity Regulation).

As the new Regulation foresees the repeal of the Rail Freight Corridors in 2030, the ExBo is currently working on developing a concept for a continued cooperation for the period after the repeal.

The ExBo also has put more effort into monitoring the Temporary Capacity Restrictions (TCRs) on the Corridor lines and the potential impact of TCRs located outside of the geographical scope of the RFC, with a focus on finding solutions for continued rail freight operation on the RFC also during disturbed periods. This should lead to a better forecast of the impact of TCRs on the traffic of the Corridor and to increased reliability of the Corridor.

MEMORANDUM OF UNDERSTANDING BETWEEN FRANCE AND SWITZERLAND AIMED AT JOINTLY DEVELOPING THE LEFT BANK OF THE RHINE.

For many years, upgrading the existing infrastructure on the former RFC North Sea – Mediterranean between Metz and Basel – particularly where not yet adapted for the passage of modern large-profile freight containers – has been a recurring topic in the Executive Board of the former RFC North Sea – Mediterranean and the current RFC North Sea – Rhine – Mediterranean.

On 11 February 2025, Switzerland and France took an important step toward improving cross-border rail freight transport along the left bank of the Rhine. Swiss Federal Councillor Albert Rösti and French Transport Minister Philippe Tabarot signed a Memorandum of Understanding (MoU) aimed at jointly developing this key international route.

The declaration underscores the shared commitment of both countries to improve the railway infrastructure on the left bank of the Rhine and to ensure that it can meet future transport needs. It sets out the goal of creating a competitive and high-performance rail infrastructure while safeguarding sufficient capacity for international freight traffic.

By the end of the first project phase, in the second half of 2027, Switzerland and France will jointly conduct the necessary studies for refining their common objectives and defining the required infrastructure upgrades and technical standards. This will be followed by the establishment of a framework on how the planned measures will be implemented. These steps will create the basis for informed decision-making and for the future development of this strategically important rail freight route.

1.2.2 // European cooperation

1.2.2.1 // COOPERATION WITH THE EUROPEAN COORDINATOR

The Executive Board met Prof. Wojciechowski, the European Coordinator of the ETC, in June 2025 in Brussels to discuss the future Work Plan of the Coordinator and his perspective on the corridor development. The Executive Board plans to conduct a meeting with the Coordinator every year.

In preparation of the Work Plan of the European Coordinator, the RFC held meetings with the Advisory Groups to discuss the Investment List for rail projects and published the conclusion in chapter 6 of the RFC NSRMs Implementation Plan.

1.2.2.2 // COOPERATION WITH THE ERTMS COORDINATOR

The Executive Board did not have the opportunity to meet Matthias Ruete, the ERTMS Coordinator, in 2025. However, the ERTMS Task Force (TF) of RFC NSRM met the Coordinator during the ERTMS information day, during which the Coordinator exchanged views with the members of the Task Force. The cooperation will continue in 2026.

1.2.2.3 // NETWORK OF EXECUTIVE BOARDS OF RFCS

The Executive Board participated in the Network of Executive Boards of RFCs (NExBo) meetings on the 14th of May and the 23rd of October 2025. The activities were related to the implementation of topics foreseen by the TEN-T Regulation and to the proposal for a Regulation on the use of railway infrastructure capacity in the single European railway area. Another regular topic discussed at NExBo-level has been the introduction of KPIs monitoring the efficiency and operations on the RFCs.

1.2.3 // Railway Undertakings and terminals cooperation

The Executive Board decided to closer cooperate with RAG and TAG representatives before, during and after the ExBo meetings. Representatives of both Advisory Groups were invited to exchange views with the ExBo during dedicated windows. During the exchanges with the RAG and TAG Speakers, various issues were brought to the attention of both Ministries and Infrastructure Managers and provided some insight views on market mechanisms and their challenges.

One of the main topics raised by RAG representatives in 2025 was the closures in the Rhine Valley for the years 2027–2029, as well as the possibilities for rerouting options during these construction works. To this end, a working group dedicated to the Rhine Valley was set up under the auspices of DB InfraGO and the RAG, co-led by DB InfraGO and RFC NSRM.

1.3 // Management Board



The CEOs and MB members of RFC North Sea-Rhine-Mediterranean at the CEO Meeting in Warsaw.

The Management Board of RFC North Sea – Rhine – Mediterranean was officially established in June 2025, to fulfill the tasks required to comply with the RFC Regulation in one single entity. Joint meetings of the IMs and ABs of the two predecessor RFCs had already started in 2023, a year prior to the official publication of the new TEN-T Regulation, to lay the foundation for the future cooperation of the new Corridor. The legal entity, EEIG Corridor North Sea – Rhine – Mediterranean, was officially founded in June 2025.

After the adaptation of the governance structure, the first major milestone of the Management Board was the publication of the Implementation Plan of RFC NSRM in July 2025, starting the 6 months transitional period. This was necessary to ensure that the Corridor would be operational by the time of the publication of the first capacity offer for TT2027 for the new alignment of the Corridor in January 2026. At the end of September 2025, the Management Board met in Utrecht to discuss the future strategy and work set-up of the Corridor, including the focus topics TCRs, capacity, performance and stakeholder relationships.

Another highlight of the Management Board in 2025 was the inaugural meeting of the CEOs of the Corridor's members in Warsaw in November, in the margins of the annual High Level Infrastructure Meeting (HLIM). The CEOs confirmed the Corridors strategy to further develop its high-quality international freight paths marketed through the Corridor

One-Stop-Shop, improve bordercrossing times and punctuality and ensure a good coordination of works along the whole Corridor. The CEOs committed to fulfilling the requirements of the revised TE-T Regulation, with the goal of an average dwell time of less than 25 minutes and a 75% arrival punctuality by 2030. On a corridor with such a high number of trains crossing two or more borders, the CEO meeting also highlighted the importance of customer focus, harmonisation of processes, international cooperation at all levels and active engagement in the European rail freight community. The CEOs underlined the need for a continued cooperation after 2030 and asked the Management Board to develop a vision of how this future cooperation could look like.

[More information on the activities of the Management Board can be found in chapter 2.](#)

1.4 // Advisory Groups

In 2025, the Advisory Groups officially began their activities under the newly established RFC NSRM. Under the amended RFC Regulation, they have taken on an important role in consultation and in shaping the future of rail freight. They continue to play a central role in aligning stakeholder expectations and providing guidance for optimising corridor operations and long-term planning.

The Advisory Groups offer views and assessments on capacity needs, infrastructure developments and investment planning related to rail freight traffic. These inputs strengthen the preparation of the future Work Plan of the ETC NSRM European Coordinator and have a direct impact on the Corridor's objectives, ensuring mutual benefits in performance, service quality and capacity. In addition, their opinions on the potential consequences of Management Board decisions contribute to more informed decision-making at both Management Board and Executive Board levels, thereby supporting the long-term development of rail transport.

RAILWAY UNDERTAKING ADVISORY GROUP

Within the Railway Undertaking Advisory Group, an important step in 2025 was the signing of a Memorandum of Understanding (MoU) establishing a clear framework for co-operation among the Railway Undertakings. The MoU promotes neutrality, inclusiveness and transparency by defining rules for membership, meetings, decision-making and voting, as well as the responsibilities of the RAG Speaker(s) in supporting effective communication with the Corridor organisation. The MoU was reviewed and endorsed by the Management Board with a strong emphasis on inclusiveness, allowing RUs that have not signed the MoU to continue participating and contributing their views. To further enhance transparency, the RFC NSRM is supporting the RAG Speakers through measures such as the creation of a neutral email address and the introduction of a dedicated section on the Corridor's website to improve visibility of meetings, agendas and updates.

In 2025, RFC NSRM organised four RAG meetings, including two hybrid and two on-line meetings. During these meetings, the main Temporary Capacity Restriction (TCR) challenges were addressed through structured discussions aimed at identifying solutions to reduce the impact on RUs. Particular attention was given to early information sharing, cross-border coordination and the development of effective mitigation measures.

As in previous years, significant focus was placed on the Rhine region. The Rhine Valley closure during Easter 2025 was reviewed in detail, with discussions centred on the operational challenges faced by freight RUs. In preparation for further major works planned for 2027, a new Rhine Valley Working Group was established alongside the existing Rhine Valley and RAN (Rhine – Ardennes – North Sea) Working Groups. Its purpose is to optimise deviation and re-routing concepts by taking a holistic view of available alternatives across different Infrastructure Managers. Furthermore, information was provided on the regular construction concepts planned and significant works for 2027 and 2028.

Regarding the continuous TCR in the Basel St. Johann area, scheduled from November 2025 to June 2027, two dedicated working groups were established by SNCF Réseau and SBB: One focusing on passenger traffic and one on freight. Also, an information meeting was held with freight RUs.

The RAG was given the opportunity to comment on the first Implementation Plan for RFC NSRM, as required by the amended RFC Regulation. To support these contributions, RFC NSRM organised two online information sessions in which the EU Coordinator's investment list was presented. Investment analysis and suggested projects on the Corridor map were shared to assist participants in preparing informed comments. Representatives of the TAG also participated in these exchanges, ensuring a coordinated input from both Advisory Groups.

At the end of 2025, RAG co-speakers Sandra Kuhlmann (DB Cargo) and Annik Jeiziner (SBB Cargo International) stepped down. The entire RFC NSRM organisation warmly thanks Ms. Jeiziner and Ms. Kuhlmann for their valuable contributions to the RAG. Paul Hodgson (CFL Cargo) and Lieven Goethals (Lineas) will continue to jointly represent the Railway Undertaking Advisory Group.

TERMINAL ADVISORY GROUP

The Terminal Advisory Group speakers from the two former RFCs, Paul Kronenberger (CFL Terminals) and Markus Bangen (Duisport), jointly continued to ensure the coordinated and strong representation of terminal interests within RFC NSRM. The TAG members were invited to provide their opinion on the draft Implementation Plan and to share its views on the EU Coordinator investment list.

During the TAG meeting held in Bettembourg on 8 October 2025, exchanges focused on operational performance metrics and their relevance for terminals and overall corridor performance. Participants also received information about the Lyon-Bettembourg traffic experience and the R-CDM Pilot project. A significant part of the meeting was dedicated to the new regulatory requirements, the ETC's future Work Plan and highlighted role of the TAG members. The meeting concluded with a site visit to the CFL Terminal including a presentation of terminals activities and operations.

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1.5 // European Coordinator

RFC NSRM participated in the two Corridor Fora in Brussels organised in 2025 by the European Coordinator for the ETC North Sea – Rhine – Mediterranean, Prof. Paweł Wojciechowski. The June meeting focused on updates from the European Transport Market Study, TEN-T rail freight operational parameters and embedding climate resilience into corridor work plans.

Members prioritised reducing border dwelling times, improving arrival punctuality, strengthening cross-border parameters and tackling implementation and funding challenges. The forum also highlighted resilience, military mobility and high-speed rail within TEN-T and called for timely communication and coordination ahead of upcoming milestones and events.

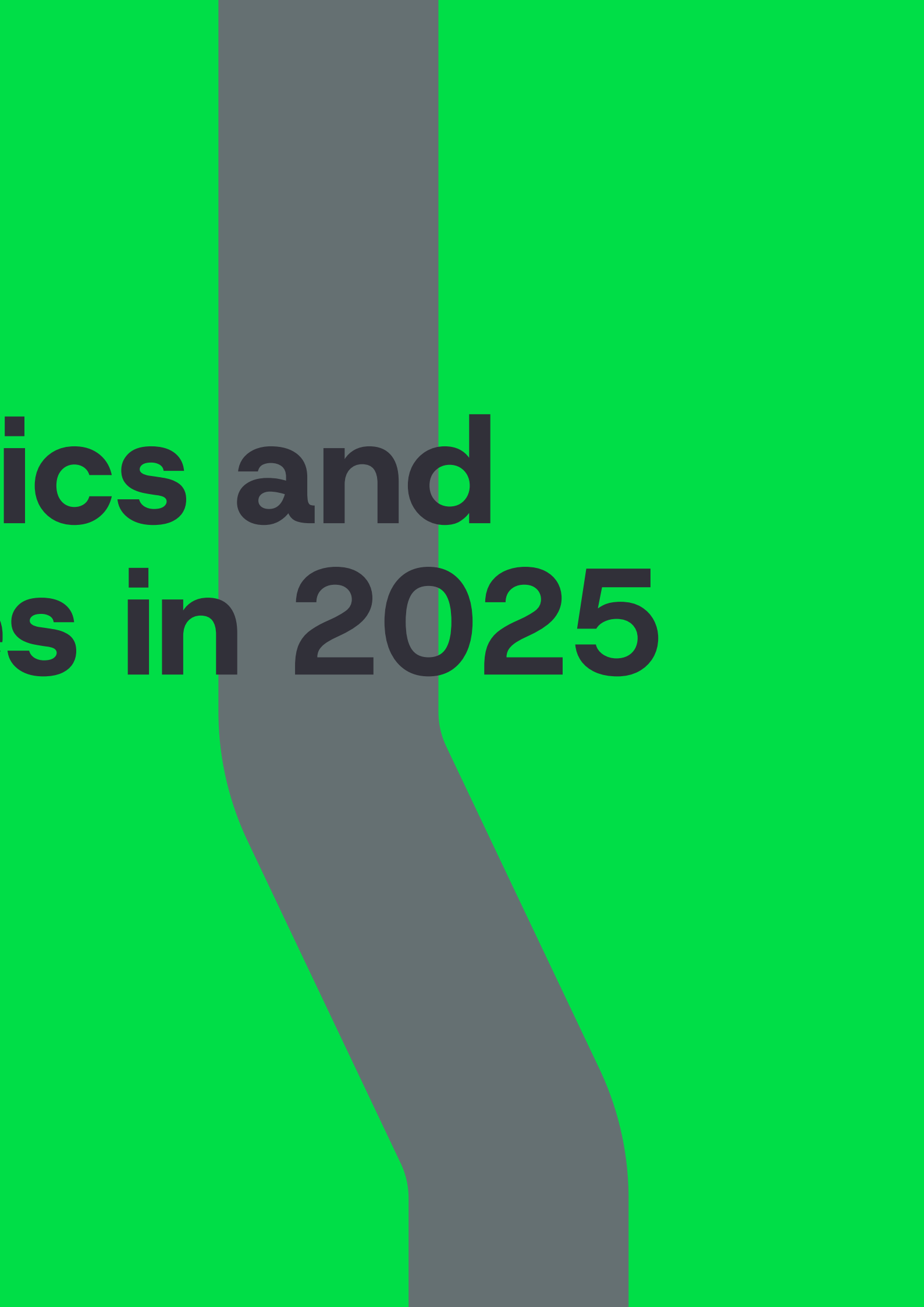
In the November meeting, the progress and challenges across corridor countries in implementing the revised TEN-T policy was reviewed, noting infrastructure advances and national priorities. The NSRM ETC study team presented the timeline for the first Corridor Work Plan through summer 2026 and identified remaining gaps in electrification, axle load and track gauge. The Rail Freight governance, represented by Guus de Mol, introduced its first Implementation Plan, calling for standardised 740m train capability, better cross-border coordination and launching a new path catalogue and website in 2026.



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2

**Key Top
Activitie**



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2.1 // Policy Developments

AGREEMENT ON THE FINAL TEXT OF THE PROPOSED RAIL CAPACITY REGULATION

On 18 November 2025, a political agreement was reached on the proposed Regulation on the use of railway infrastructure capacity ("Rail Capacity Regulation"). The Commission presented the draft on 11 July 2023, followed by discussions in the Council and the European Parliament.

The Regulation aims to optimise the use of railway capacity, strengthen cross-border coordination and improve punctuality and reliability. The first timetable developed under the new framework is the timetable 2031, which starts in December 2030. After the political agreement, the formal adoption by the European Parliament and the Council is expected in summer 2026.

The Regulation will significantly affect the Rail Freight Corridors (RFC), as it repeals Regulation (EU) 913/2010 and transfers many RFC competences to the Network Coordinator. Consequently, the Executive and Management Board of RFC North Sea – Rhine – Mediterranean discussed the implications extensively throughout 2025 and will continue this work in the coming years.

PROGRESS ON THE SWISS-EU PACKAGE (BILATERALS III)

On 13 June 2025, the Swiss Federal Council approved the agreements in the new package with the European Union to stabilise and develop Switzerland's bilateral approach with the EU and launched the national consultation process. The package includes the modernisation of the Land Transport Agreement (1999), which will henceforth be dynamically aligned with developments in EU legislation. This ensures continued and legally secure market access for Swiss transport operators and strengthens cross-border coordination. The updated agreement will also apply EU state aid rules in the land transport sector, supporting fair competition across the European transport market. Overall, the package enhances regulatory harmonisation and contributes to more efficient and reliable cross-border freight transport and is due to be signed in Brussels in 2026.

REVISION OF THE EU DIRECTIVE ON WEIGHTS AND DIMENSIONS

The revision of the EU Directive on Weights and Dimensions made significant progress in 2025. With the European Parliament's position adopted in 2024, the Coreper agreement in November 2025 and the Council's General Approach of 4 December 2025, the path has been cleared for the final negotiations. The Directive is expected to be finalised in 2026, but this depends on the pace of negotiations between the Council and the Parliament. The amendments aim to support the deployment of zero emission trucks, facilitate cross-border transport operations and establish clear framework conditions for intermodal transport and the use of European Modular Systems. The Executive Board will specifically follow the Directive's impact on intermodal transport in order to maintain the competitiveness of intermodal rail freight.

2.2 // Implementation Plan

In July 2025, the Executive Board and Management Board of RFC North Sea – Rhine – Mediterranean published the first Implementation Plan for the new Corridor in line with the amended RFC Regulation.

The Implementation Plan outlines the new routing of the Corridor, the new governance set-up, smarter use of infrastructure, punctuality and border crossing efficiency and the proactive management of Temporary Capacity Restrictions amid intensified construction works. In addition to a detailed description of the characteristics of the new Corridor, the Implementation Plan also includes the executive summary of the TMS, the capacity bottleneck analysis, the measures for implementing the RFC Regulation and the operational priorities deriving from the TEN-T Regulation. To compile the information required to provide a comprehensive overview of the TEN-T parameters and the bottleneck analysis, the work of the infrastructure experts in the Working Group Infrastructure and Terminals was essential.

Together with the Implementation Plan, an overview of the foreseen deployment of ERTMS along the Corridor lines was published by the ERTMS TF and the ERTMS Expert WG.

An emphasis was placed on transparency and on close cooperation with stakeholders during the consultation of the Implementation Plan with the Advisory Groups of the Corridor, with the results being outlined in chapter 6 of the document. The Implementation Plan is the basis of the RFC's work in the upcoming years, thus it was intensively discussed with the stakeholders of RFC NSRM in a meeting in April 2025.

In a separate meeting, the Coordinator's project list was elaborated with the Advisory Groups. The outcomes of those discussions have also been added as chapter 6 to the Implementation Plan.

2.3 // Capacity offer

The task to align the capacity processes led to many constructive discussions with and between the IMs/ABs in the WG Capacity, both C-OSS, MB, Executive Board and RUs. A common PaP offer for the timetable year 2027 including section 4 of the CID for the new RFC NSRM was elaborated and published in January 2026.

The catalogue is now being promoted by the two C-OSS Managers acting as one face to the customer. Training sessions on how to submit requests in the new PCS Capacity Broker are being organised to support potential customers.

All publications related to TT2026 were, in line with the RFC Regulation, still published separately under the umbrella of RFC RALP and RFC NSM.

We also made use of synergies effects on the way and found the best way possible to work in the new setup of the common RFC NSRM. For more information on the Capacity KPIs, see chapter 3.3.

2.4 // Temporary Capacity Restrictions

The aim of the RFC TCR WG was to facilitate the early cooperation of the Infrastructure Managers to coordinate Temporary Capacity Restrictions (TCRs) due to infrastructure works, to reduce the impact for Railway Undertakings and keep freight trains running.

This approach from the two former Corridors has not changed with the new RFC North Sea – Rhine – Mediterranean.

In previous years, dedicated bi- and trilateral working groups were introduced, in which experts from the TCR departments of the involved IMs coordinate TCRs. Currently, four of these working groups exist on the Corridor and will typically meet twice a year or more often if required:

- BeNeDe (Belgium, Netherlands, Germany)
- RAN (France, Germany, Luxembourg, Belgium, Switzerland)
- Rheintalbahn (Germany, Switzerland)
- Riunione di Coordinamento lavori SBB-RFI-BLS (Italy, Switzerland)

These well-established working groups conduct the coordination of internationally relevant TCRs and inform and consult customers. The working groups are highly valued by the market and the results of the coordination groups are used to support further Task Forces and advisory groups like the Railway Undertaking Advisory Group or the Rhine Vally Task Force (Offenburg-Basel) in 2026. The Working Groups and Task Forces alike do not replace national processes but support international coordination between IMs.

The TCR WG collects the results of these bi- and multilateral working groups and summarises and publishes the results twice a year in the form of a TCR Overview (Excel file) and impact overviews.

2.5 // Train Performance Management

Following the integration of the RFCs NSM and RALP, the Train Performance Management (TPM) Working Groups also joined and a new organisational structure was discussed following the strategic MB meeting, in which TPM was highlighted as one of the key priorities for RFC NSRM. The aim of the new structure, that will be set up in 2026, is to strengthen cooperation across stakeholders and reinforce the Corridor's focus on punctuality, dwell times and operational efficiency.

2.6 // ERTMS developments

In July 2025, together with the Implementation Plan, RFC North Sea – Rhine – Mediterranean also published an ERTMS deployment overview on a voluntary basis, as it considers ERTMS to be an integral part of the European rail network.

Therefore, RFC NSRM published an overview of the current state of play of the ERTMS roll-out on the new alignment of the Corridor, including a comprehensive look at the planned completion dates, ETCS deployment type, ETCS system version, the planned development of the radio systems, the expected availability of class B/A systems. The document has been elaborated by both, the Corridor ERTMS Experts Working Group as well as the Ministries' ERTMS Task Force, with the aim of achieving the best possible level of information.

Furthermore, the ERTMS Experts Working Group and ERTMS Task Force were heavily involved in the preparation of the ERTMS Information Day hosted by RFC NSRM in Frankfurt on 26 November 2025, which showcased current challenges on the European rail sector's journey towards digital transformation and interoperability ([see chapter 2.8](#)).

2.7 // International Contingency Management

In 2025, one ICM case was declared on RFC North Sea – Rhine – Mediterranean. The ICM was initiated by DB InfraGO on 19 September 2025 following the derailment of a freight train departing from Emmerich Station (Germany) towards Zevenaar (Netherlands), one of the busiest border sections between Germany and the Netherlands. The derailment damaged a level crossing and several switches, resulting in a full closure of the track for nearly 14 days. All restrictions were lifted on 1 October 2025.

During the incident, all traffic, both freight and passenger, was diverted via Venlo. Only regional services resumed operations earlier in one direction. The Corridor initiated the international telcos and supported coordination between IMs in line with the ICM handbook.

No separate simulation was carried out in 2025. However, with the establishment of the new Corridor, new contact persons were designated and the contact details were updated in the Incident Management Tool of the Train Information System (TIS).

In addition, the process of updating the re-routing scenarios for the new Corridor started and will continue in 2026.

2.8 // Marketing and Customer Relations

Marketing activities in 2025 focused on introducing the newly established RFC NSRM and strengthening communication with stakeholders.

The Corridor developed a new identity and visual design aligned with its mission within the European Union. Additionally, to support a more structured stakeholder engagement, dedicated communication channels were launched, including a new website, new LinkedIn account and Newsletter.

TRANSPORT LOGISTIC FAIR 2025

RFC NSRM, together with RFC Atlantic, RFC Mediterranean, RFC North Sea-Baltic, RFC ScanMed and RailNetEurope (RNE), shared a stand at the Transport Logistic Fair from 2 to 5 June 2025 in Munich. There, information about the future of the RFC Network, the schematic network map and the new alignment of the RFCs was presented to the industry professionals. Additionally, RFC NSRM had the opportunity to visit and inform customers about the new Corridor and invite them to participate in the Advisory Group meetings. The Transport Logistic Fair also allowed RFC NSRM to discuss daily business challenges related to rail freight and work jointly with stakeholders to find mutually beneficial solutions in line with EU regulations.

CUSTOMER INFORMATION PLATFORM

The Customer Information Platform (CIP) continued to play a key role in ensuring transparency and effective communication with customers in the rail sector. As part of this centralised platform developed by RNE, the Railway Infrastructure System (RIS) plans to develop an initiative to improve the integration and utilisation of high-quality infrastructure data from RINF.

In 2025, RNE, together with the RFC Network, prepared the phasing out of information related to the former RFCs and implemented changes to introduce the new alignment of the RFCs in line with the corresponding ETCs. The full implementation of the RFC NSRM was completed in January 2026. Currently, RFC NSRMs publications are accessible to stakeholders under the tab "Information Documents" in CIP.

ERTMS INFORMATION DAY 2025

RFC North Sea – Rhine – Mediterranean hosted the ERTMS Information Day in Frankfurt on 26 November 2025, showcasing current challenges in the European rail sector's journey towards digital transformation and interoperability. The day commenced with the input from the European Coordinator for ERTMS, Mr. Matthias Ruete, outlining the regulatory developments to the 70 participants, including the revised TEN-T Regulation, deadlines for radio-based systems and the obligation to decommission legacy Class B systems. By 2030, an additional 9,100 vehicles are expected to be equipped with ETCS, representing a 76% increase over previous trends. The Commission emphasised the need for harmonisation, long-term planning, increasing industry capacity and adaptation of the EU legal framework for State Aid.

After that, each ministry of RFC NSRM presented the current state of play of the national roll-out of ERTMS. Cross-border coordination also emerged as critical during the discussions with risks identified in loosely aligned implementation steps, system inconsistencies and increased costs for vehicle fleets and staff training. The event underscored the importance of bilateral agreements, joint monitoring and the creation of favourable conditions by Member States and National Safety Authorities (NSAs). High-speed international operations illustrated the complexities of multi-country ERTMS deployment and the necessity for regular communication and project coordination.

In conclusion, the event provided a good platform for sharing strategies, challenges and solutions.



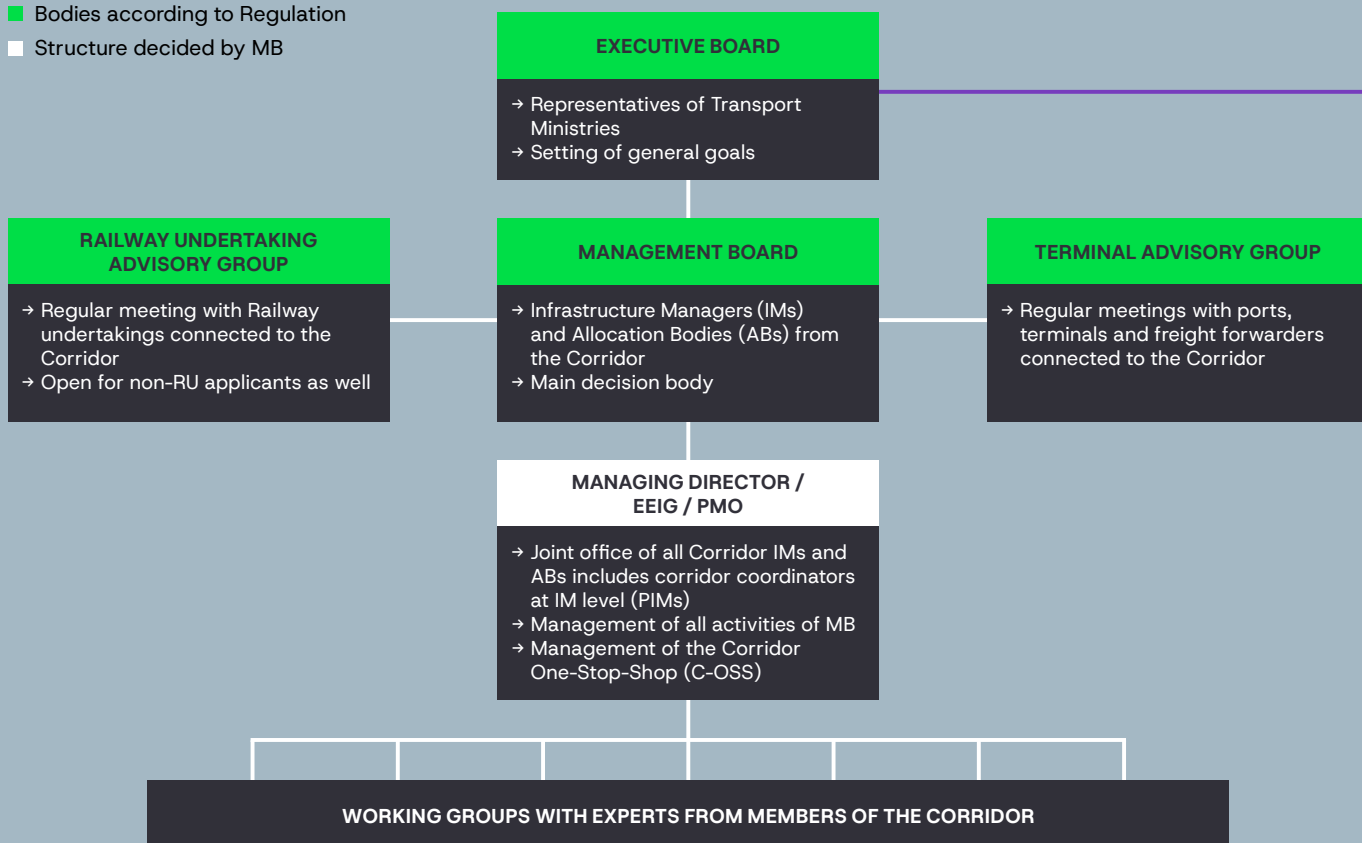
2.9 // Report from the Regulatory Bodies and National Safety Authorities

Report from Regulatory Bodies

IRG-Rail has published a report on monitoring on European Rail Freight, aiming to enhance cooperation and information exchange between them. The report describes the monitoring methods and objectives, including the collection of quantitative KPIs and qualitative analysis through questionnaires and customer satisfaction surveys. The report analyses the monitoring results, including train path utilisation, numbers of conflicts and customer satisfaction and highlights the RFCs' challenges and potential improvement. It also identifies challenges such as temporary capacity restrictions and the need for greater harmonisation of IT tools. In IRG-Rail, all Regulatory Bodies of the Corridor are taking part.

Please see the following link for more details:
www.irg-rail.eu/irg/documents/annual-reports/536,2025.html

- Bodies according to Regulation
- Structure decided by MB



National Safety Authorities report

NSA WORKING GROUP REPORT

The National Safety Authorities (NSAs) of the RFC NSRM and of the RFC Scandinavian – Mediterranean (ScanMed) are organised as “NSA Corridor Group”, which deals with NSA related topics on both corridors in its respective NSA Working Groups.

Since their establishment, the tasks of the NSA Working Groups have significantly changed. In the past, the task of the NSA Working Groups was to coordinate the authorisation of specific cross-border vehicles or cross-border infrastructure projects between the different NSAs on the corridors. With the introduction of the current European legislation (4th Railway Package) and with ERA acting as the authorising entity for vehicles, safety certificate and for ERTMS trackside approval, the role of the NSA Working Groups has already changed. Their primary task is now to coordinate the national checks that form part of the authorisation procedures conducted by ERA.

One of the two main NSA Working Groups is Task Force Interoperability (TFI). It supports vehicle authorisation projects concerning vehicles operating on the Corridor, whose approval process is managed by ERA.

The second NSA Working Group is the NSA RFC NSRM + ScanMed Working Group abbreviated as “NSA WG”. This NSA WG is dealing with generic topics in relation to the European legislation and their application, especially with respect to the subsystems Control Command and Signalling (CCS) and Operations (OPE). TFI and NSA WG cooperate, exchange and support each other in concrete projects if required.

At management level, above the Working Groups TFI and NSA WG there is the so-called NSA Steering Committee which governs the whole NSA Corridor Group. The NSA Corridor Group is embedded into the structure of the RFC NSRM organisation as follows (see Figure 03):

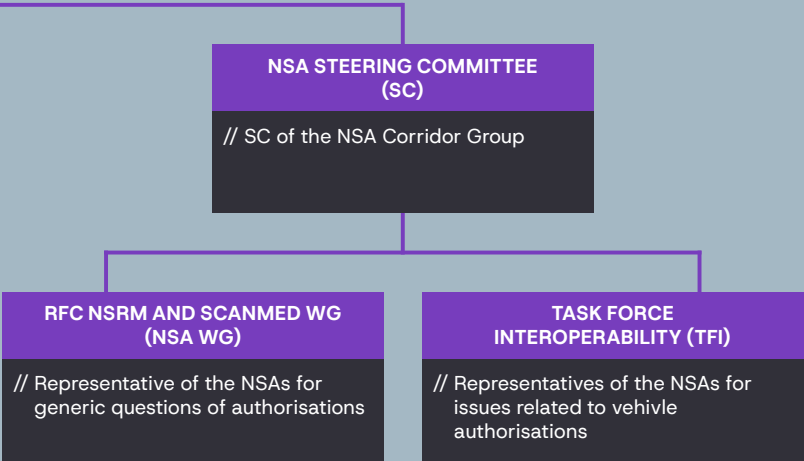


Figure 03
The Corridor structure with National Safety Authorities.

The following sections report about the activities of the NSA Working Groups:

National Safety Authority for the RFCs NSRM & ScanMed Working Group (NSA WG)

The NSA WG develops a common understanding of ERTMS issues in relation to authorisation and implementation on the corridors.

Besides generic topics such as errors, interpretation and handling of legislation, etc. also other topics like operational issues are dealt with and coordinated with the responsible stakeholders. Issues identified by the group, which cannot be solved on corridor level or might have a broader impact, are reflected by NSAs via their national channels, e. g. MoTs, into the respective groups on European level (e. g. ERTMS NSA Network, or in the frame of the TSI CCS Working Party, both organised by ERA).

NSA WG activities in 2025

TSI CCS AMENDMENT 2025

In 2023 the new TSI CCS (EU) 2023/1695 was adopted. After publication in the Official Journal of the European Union, it entered into force on 28 September 2023.

With the new TSI CCS 2023 an updated application guide entered into force and was published by ERA.

Some updates were missing in the TSI CCS 2023, therefore an amendment of the TSI is required. The NSA WG is continuously dealing with the TSI CCS drafts provided by ERAs TSI working groups. The aim of this task is to obtain a common understanding on the content, the impact and consequences of the proposed TSI amendments and to generate feedback for ERA's working groups.

The NSA WG is also discussing the updates of ERA's TSI CCS application guide that were proposed by ERA. The goal is to achieve a common understanding of the TSI CCS and to discuss issues with regard to the implementation and application of this TSI and to provide ERA with feedback.

NATIONAL RULES (NRS) RELATED TO CCS

The NSAs are continuously discussing the NTRs related to CCS that are relevant for vehicle authorisation in order to get a mutual understanding of these rules. Based on this work, trilateral discussions took place, starting with Germany, Austria and Switzerland to explore possibilities to harmonise rules that are similar in two or more countries. The results of those discussions were summarised by and shared within the NSA WG. Each member started to add their rules to the summary. Discussions on those will continue in 2026 encompassing changes within the NRS due to the CCS TSI.

CONTINUOUS EXCHANGE OF EXPERIENCE WITH ERTMS VEHICLE PROJECTS

The Dutch ETCS project on retrofitting the Dutch freight locomotive fleet to ETCS Baseline 3 and the Dutch ERTMS project coordinating the ERTMS roll-out in passenger rail traffic regularly share updates on their state of play with the NSA WG. The focus is on lessons learned and newly arising issues, including national technical rules, derogation procedures and specifications introduced in the revised CCS TSI, as well as procedures and responsibilities under the Fourth Railway Package.

www.era.europa.eu/era-folder/ertms

COORDINATION OF DEVELOPMENT REVISION TSI

During the performance of the primary working group tasks, coordination also takes place with the WG TSI OPE Operational Harmonisation (OH). Due to the coherence of regulations within and between both subjects, TSI OPE and TSI CCS and the WG members that also participate in the TSI OPE OH. This allows rapid and effective tuning to take place and leads to more homogeneous, unambiguous and coherent wording of laws and provisions.

CONTINUOUS UPDATE ON DIFFERENT EUROPEAN ERTMS RELATED WORKING GROUPS

To ensure a wide knowledge of European developments in the field of CCS and ERTMS, the WG regularly provide input into the work of the following groups:

- Task Force Interoperability (TFI)
- Task Force ERTMS NSRM
- ERTMS Control Group
- Topical Working Group Train Architecture
- Operational Harmonisation
- RISC and also
- The Steering Committee (SC) of NSRM and Scan-Med.

This is either done by members of the WG who also participate in one of those groups or after invitation by a representative of these respective groups. Thus, a broad perspective of CCS / ERTMS is achieved by the WG, helping e.g. in addressing and understanding issues and in delivering input to the legislators to harmonise legal texts.

Objectives of the NSA WG for 2026

According to the annual work plan of the NSA WG for 2026, the group will in particular focus on the following main objectives:

→ Guidance for projects

The NSA WG intends to continue guiding CCS vehicle projects with regard to derogation aspects concerning NTRs for ERTMS and Class B systems. It will also continue to identify and share best practices with the sector with respect to CCS authorisation.

→ Cross-border interoperability issues

The NSA WG will tackle issues hampering cross-border traffic related to ERTMS as well as operational problems identified on the Corridor falling under the responsibility of the NSAs. In parallel, the majority of the NSAs is involved in a respective NSA network subgroup at ERA level that is dedicated to cooperation agreements between NSAs on basis of the 4th railway package.

→ National rules (NRs) related to CCS

The NSAs will continue discussing the NRs in the area of CCS that are relevant for vehicle authorisation. The purpose is to get a mutual understanding of these rules and if possible, to promote their harmonisation.

The NSAs will exchange views and experiences in notifying national rules for trackside CCS, as ERA is now asking for the Member States to provide national rules on the trackside CCS subsystem, if necessary.

Task Force Interoperability (TFI)

The TFI is a Working Group aiming at facilitating the authorisation of vehicles in the networks of the participating countries including, Austria, Germany, Italy, the Netherlands and Switzerland. The TFI provides an effective platform for applicants to clarify general aspects of the vehicle authorisation process, as well as the operation of authorised vehicles in the participating corridor countries.

The legal basis for the authorisation for placing vehicles on the market (requirements, process steps, responsibilities, timeframes and evidence) is provided by the Implementing Regulation (EU) 2018/545.

All authorisations for international vehicles are now issued by ERA as the authorising entity, in cooperation with NSAs, which remain responsible for assessing the notified national technical rules under formal agreements pursuant to Article 76 of Regulation (EU)

2016/796. To reflect ERA's role, the TFI revised its composition to include experts from ERA, NSAs and the above mentioned IMs of the member states. These members contribute their expertise on vehicles, the authorisation process and vehicle-infrastructure interfaces. The TFI also invites representatives of vehicle manufacturers to address and resolve concrete issues occurring in the authorisation of vehicle projects on the corridor.



3 Perform Report



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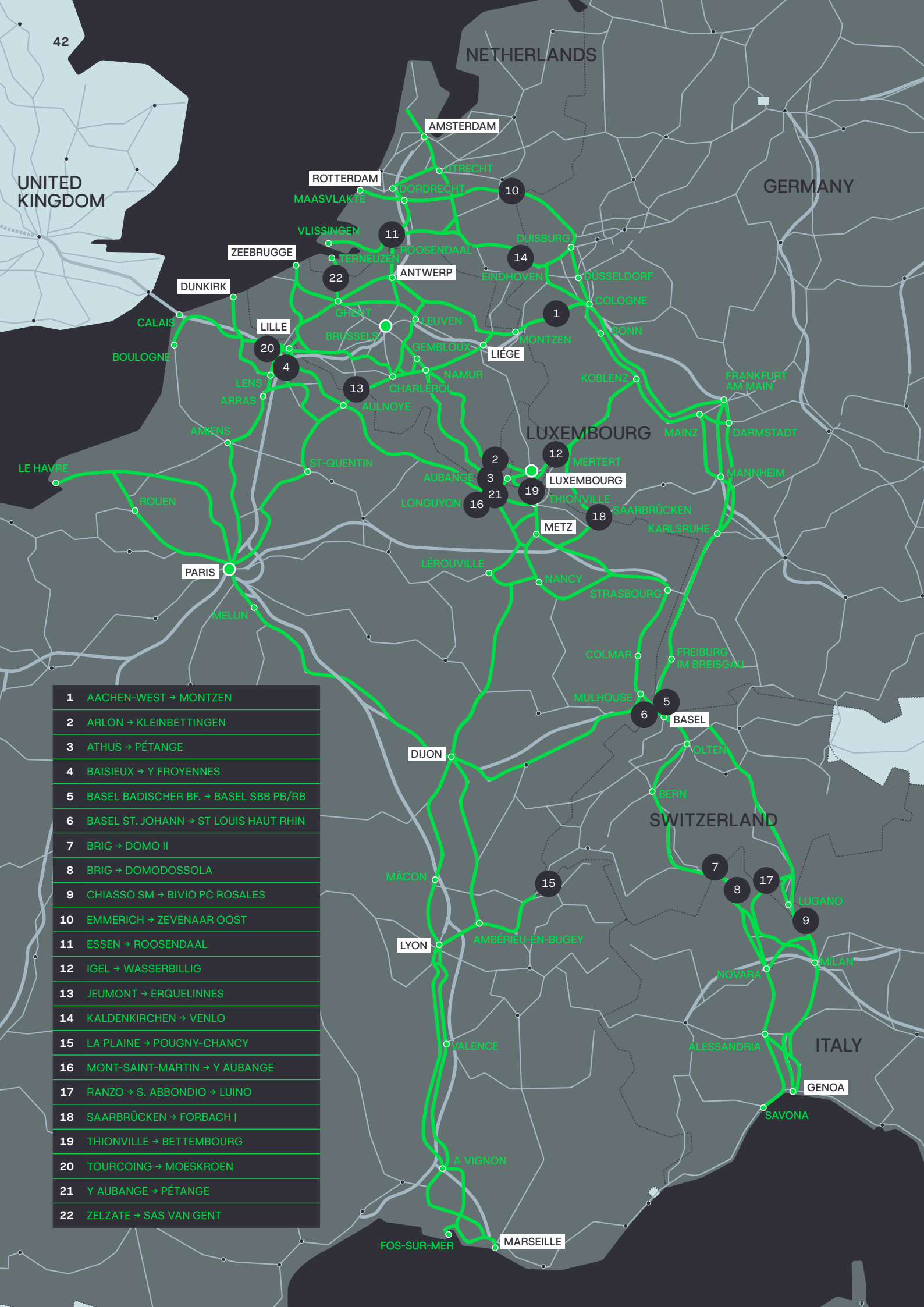


This chapter provides an overview of the most recent KPIs on capacity management, operations and market development along the NSRM corridor. These KPIs have been coordinated with external stakeholders such as Railway Undertakings and Ministries of Transport and are harmonised across all RFCs.

Following the integration of the NSM and RALP corridors, the Operations and Market Development KPIs of the RFCs were, for the first time, established according to the new alignment in line with the ETC framework, except for the ratio of capacity allocated by the C-OSS, which is still based on the old alignment, as well as the Capacity Management KPIs.

This also marks the first publication of KPIs based on this new geographical scope. As a result, comparisons with previous years are not possible. In addition, these figures should be interpreted with due caution, as they may still reflect certain data quality issues, double counting and potentially incomplete data.

The Corridor will continuously work on improving the data in the future. From 2026 onwards, the operational TEN-T priorities (dwell and punctuality) will officially be reported on in the Annual Report published in 2027. That Annual Report will also include a dedicated section presenting the views and assessment of the performance of the Corridor by the Advisory Groups, as foreseen in the amended RFC Regulation.



- | | |
|----|---------------------------------------|
| 1 | AACHEN-WEST → MONTZEN |
| 2 | ARLON → KLEINBETTINGEN |
| 3 | ATHUS → PÉTANGE |
| 4 | BAISIEUX → Y FROYENNES |
| 5 | BASEL BADISCHER BF. → BASEL SBB PB/RB |
| 6 | BASEL ST. JOHANN → ST LOUIS HAUT RHIN |
| 7 | BRIG → DOMO II |
| 8 | BRIG → DOMODOSSOLA |
| 9 | CHIASSO SM → BIVIO PC ROSALES |
| 10 | EMMERICH → ZEVENAAR OOST |
| 11 | ESSEN → ROSENDAAL |
| 12 | IGEL → WASSERBILLIG |
| 13 | JEUMONT → ERQUELINNES |
| 14 | KALDENKIRCHEN → VENLO |
| 15 | LA PLAINE → POUIGNY-CHANCY |
| 16 | MONT-SAINT-MARTIN → Y AUBANGE |
| 17 | RANZO → S. ABBONDIO → LUINO |
| 18 | SAARBRÜCKEN → FORBACH I |
| 19 | THONVILLE → BETTEMBOURG |
| 20 | TOURCOING → MOESKROEN |
| 21 | Y AUBANGE → PÉTANGE |
| 22 | ZELZATE → SAS VAN GENT |

3.1 // Market Development KPIs

This part of the Performance Report presents the Market Development KPIs for RFC NSRM, providing insights into traffic patterns and the role of rail freight along the Corridor. It focuses in particular on the evolution and distribution of cross-border freight traffic. Although the KPI ratio of the capacity allocated by the C-OSS and the total allocated capacity is also a Market Development KPI, it will be dealt with under the Capacity Management KPIs ([see 3.3](#))

KPI number of trains per border 2025

The KPI Number of Trains per Border, refers to the total number of international freight trains crossing a border within an RFC, considering only trains operating across at least one RFC border.

The number of trains per border clearly illustrates the geographical concentration of traffic along the Corridor. Flows are heavily structured around a limited number of major cross-border points, with Basel Badischer Bf.-Basel SBB recording the highest. This confirms Basel’s role as a key hub concentrating traffic coming from the North Sea ports towards the southern part of the Corridor in Italy. Significant volumes at Aachen-Montzen, Kaldenkirchen-Venlo and Chiasso further highlight the strength of the north-south axis.

The ongoing third track works between Oberhausen and Emmerich in 2025 have impacted capacity and traffic flows on this section leading to lower volumes at the Zevenaar-Emmerich border and, in contrast, other border sections show slightly higher volumes due to rerouted traffic.

KPI train kilometers of trains per border 2025

This KPI represents the sum of the real distances travelled between origin and destination of all trains crossing a specific border along RFC NSRM.

Figure 04
The border crossings
along RFC NSRM.

Figure 05

KPI number of trains per border 2025

CROSS-BORDER SECTION	NUMBER OF TRAINS
Aachen-West → Montzen	22,375
Arlon → Kleinbettingen	26
Athus → Pétange	32
Baisieux → Y Froyennes	485
Basel Badischer Bf. → Basel SBB PB/RB	35,787
Basel St. Johann → St Louis Haut Rhin	968
Brig → Domo II	12,376
Brig → Domodossola	12,213
Chiasso SM → Bivio PC Rosales	14,586
Emmerich → Zevenaar Oost	11,866
Essen → Roosendaal	5,238
Igel → Wasserbillig	3
Jeumont → Erquelinnes	2,049
Kaldenkirchen → Venlo	18,348
La Plaine → Pougny-Chancy	322
Mont-Saint-Martin → Y Aubange	1,272
Ranzo → S. Abbondio → Luino	8,891
Saarbrücken → Forbach	7,847
Thionville → Bettembourg	4,085
Tourcoing → Moeskroen	2,946
Y Aubange → Pétange	1,857
Zelzate → Sas van Gent	1,647

The figures for the Domodossola border (CH-IT) are reported twice, as 'Domo II' and 'Domodossola' and should not be combined, as they refer to overlapping data.

Figure 06

KPI train kilometers of trains per border 2025

CROSS-BORDER SECTION	TRAIN KILOMETERS
Aachen-West → Montzen	12,416,358
Arlon → Kleinbettingen	5,101
Athus → Pétange	5,313
Baisieux → Y Froyennes	106,970
Basel Badischer Bf. → Basel SBB PB/RB	20,800,026
Basel St. Johann → St Louis Haut Rhin	481,695
Brig → Domo II	5,950,231
Brig → Domodossola	5,878,123
Chiasso SM → Bivio PC Rosales	7,136,300
Emmerich → Zevenaar Oost	6,494,493
Essen → Roosendaal	2,313,190
Igel → Wasserbillig	282
Jeumont → Erquelinnes	778,655
Kaldenkirchen → Venlo	9,837,103
La Plaine → Pougny-Chancy	79,575
Mont-Saint-Martin → Y Aubange	710,874
Ranzo → S. Abbondio → Luino	6,445,266
Saarbrücken → Forbach I	3,664,698
Thionville → Bettembourg	2,887,540
Tourcoing → Moeskroen	1,484,019
Y Aubange → Pétange	858,203
Zelzate → Sas van Gent	354,608

3.2 // Operations KPIs

KPI RFC entry and exit punctuality in 2025 ($\leq 30'$, $\leq 15'$ threshold)

Punctuality figures are calculated for freight trains crossing a border along the Corridor. This KPI is based on the new RFC train definition introduced by the RFC Network in 2024. According to the new methodology, a train will be included in the reporting for a Corridor even if it does not cross one of that corridor's borders but runs at least 300 km on the Corridor.

Following the introduction of the new alignment after the integration of the NSM and RALP corridors, the available punctuality data are based on a new geographical scope and cannot be compared with previous years. Depending on the threshold used, the punctuality figures at origin 65% and 57%, already indicate that a significant portion of trains depart late.

Along the Corridor, punctuality further decreases, reaching 52% and 45% at the RFC Exit. This shows that delays are not only present at the RFC entry but also propagate and accumulate along the route, affecting the overall on-time performance at the RFC exit.

Punctuality was influenced by several factors in 2025. The broader economic context, including lower industrial production (e.g., steel, automotive, chemicals) leading to fewer or more irregular train paths, a general slow-down or volatility in demand, impacting train planning and last-minute changes and fluctuations in port activity (Antwerp, Rotterdam) affecting traffic volumes and peaks, had a significant effect on operations. Ongoing infrastructure works also played a role, such as major projects including track upgrades or additional tracks (Basel – Basel St. Johann section, Emmerich border – Oberhausen main station section etc ...)

Figure 07

Punctuality 30' Threshold

at Entry

at Exit

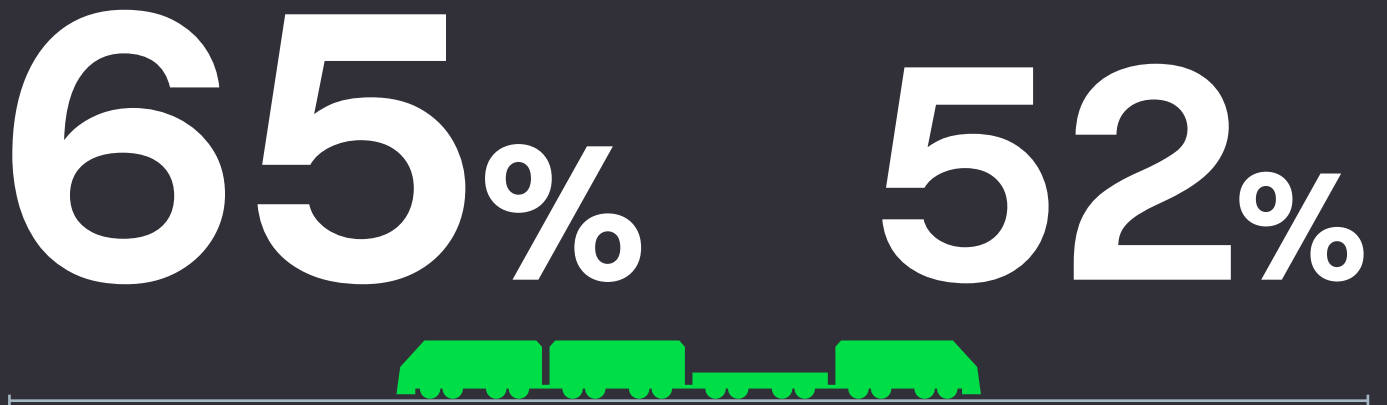
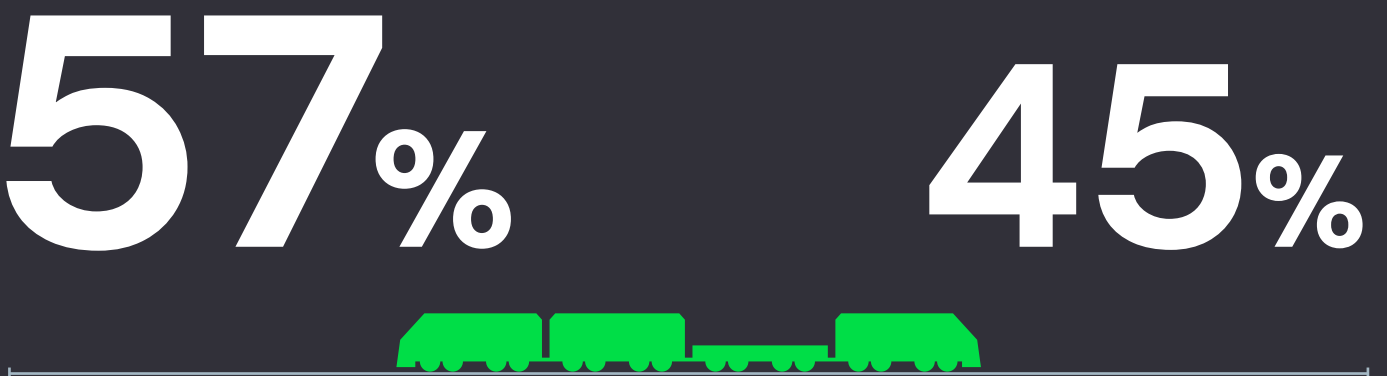


Figure 08

Punctuality 15' Threshold

at Entry

at Exit



one hundred and
twenty-three
thousand
two hundred
and nine

KPI number of trains per RFC (123.209)

This KPI is also based on the RFC train definition, which aims to allow a more precise allocation of individual trains to specific Corridors. While the methodology itself was already applied last year, the notably new geographic scope for RFC NSRM means that no comparison with previous years is possible at this stage.

KPI train kilometers of trains per RFC (59.355.370)

This KPI represents the sum of the actual distances travelled by all freight trains crossing at least one border along RFC NSRM during the year.

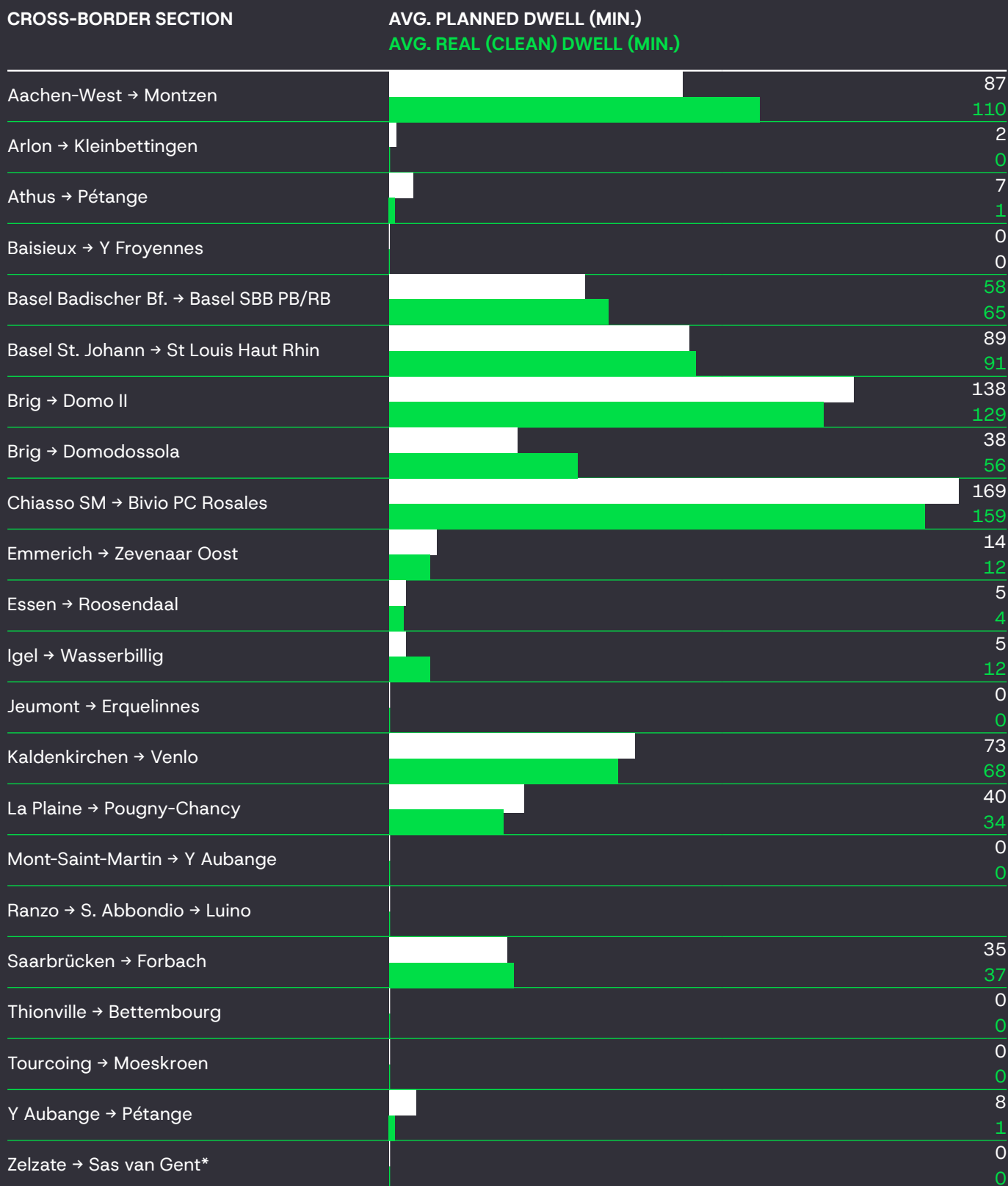
fifty-nine
million
three hundred
and fifty-five
thousand
three hundred
and seventy

KPI dwell time in border sections (planned/clean dwell)

Planned dwell in a single point is calculated as difference between scheduled departure from point and scheduled arrival to point. For each train, the planned dwell times at all relevant measuring points are summed up. The KPI provides the average planned dwell of all international freight trains crossing the border, including the train with zero planned dwell, with the data deriving from TIS.

Figure 09

KPI dwell time in border sections (planned/clean dwell)



* measured only on the Belgian side

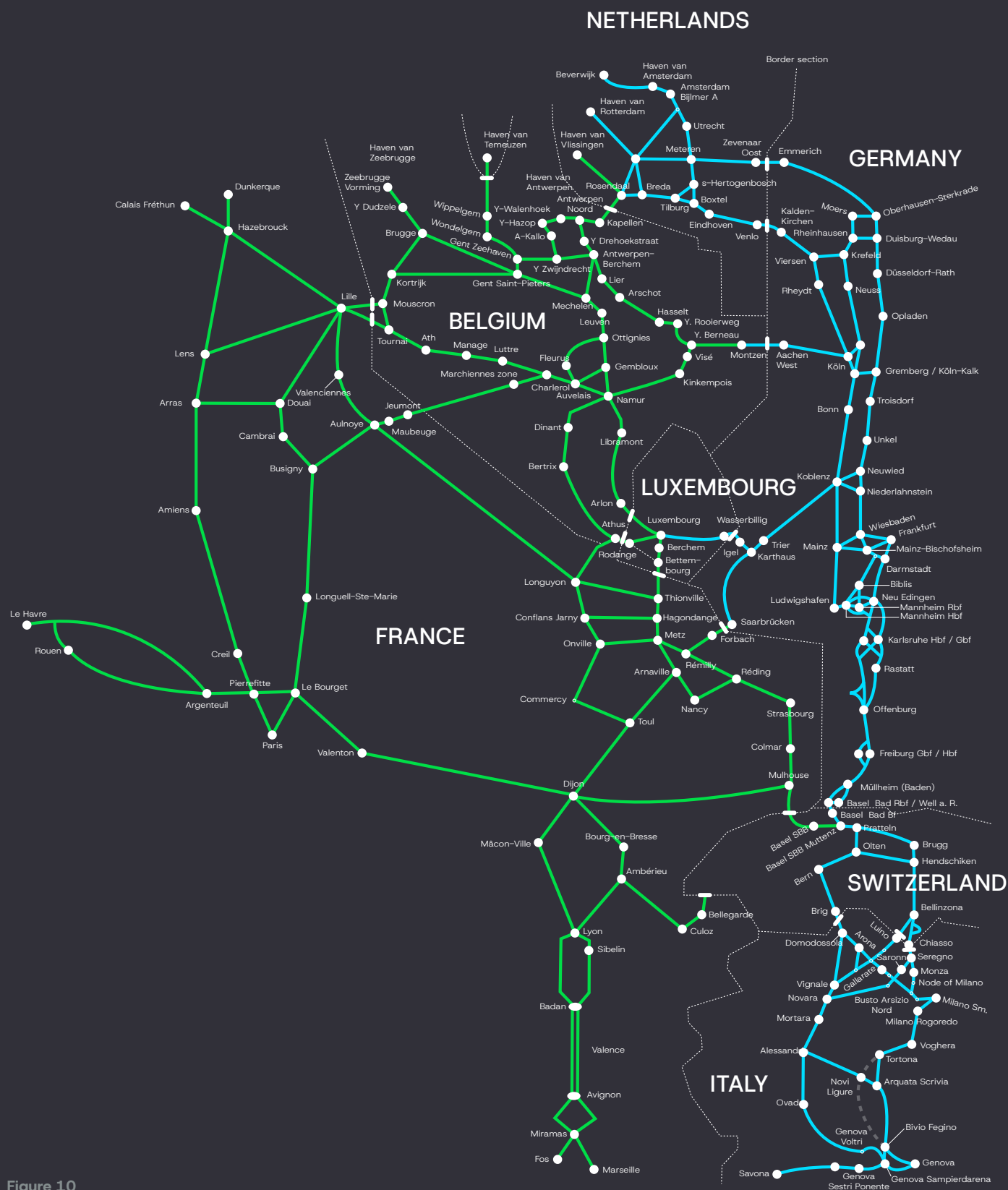


Figure 10
The two different sections of capacity offers of the former RALP and NSM corridors.

3.3 // Capacity Management KPIs

The publication of the new RFC NSRM Implementation Plan in July 2025 resulted in capacity offers at the beginning of the year still being issued separately under the former RALP and NSM corridors, leading to the KPIs in this Annual Report also being presented separately.

KPI volume of offered, requested and pre-booked capacity

This KPI shows the development of offered, requested and pre-booked PaPs for the 2022 – 2026 (TT). Generally, the offered PaPs are planned for operation on seven days a week, yet some connections might have a lower availability (e.g., 4 or 5 running days), or a given PaP might not be available on some days throughout the year due to TCRs.

RFC RHINE – ALPINE

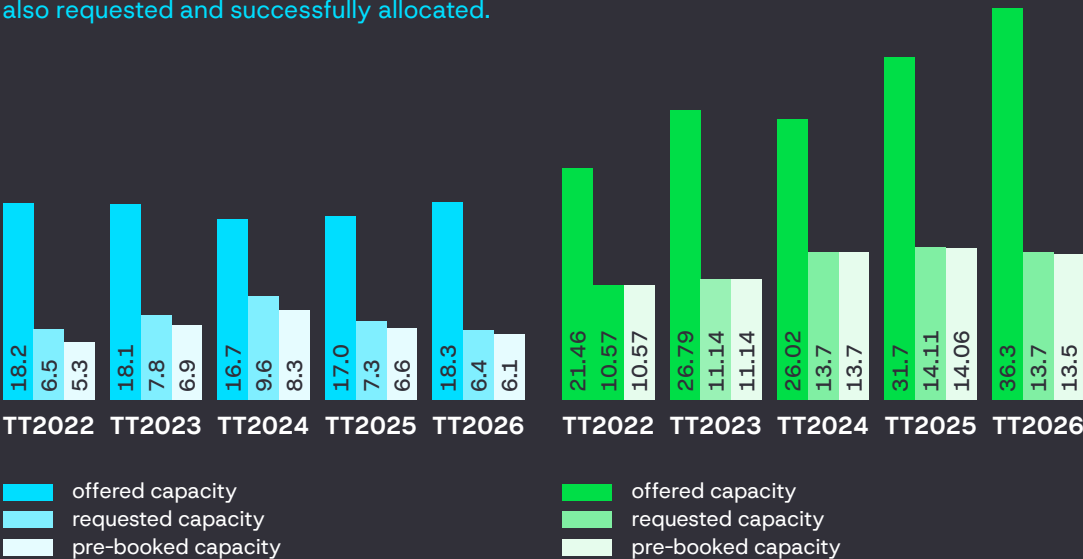
For TT2026, a total of 18.34 million PaP-km was offered. Despite the number of cut-out days, the volume of offered PaP-km slightly increased. The volume of requested capacity (PaPs) amounted to 6.4 million PaP-km, representing a 12% decrease compared to the previous year. With 33% as the ratio of pre-booked capacity to the offered capacity, the objective of 35% was not achieved for TT2026.

Due to conflicts between some requests, it was only possible to allocate 95% of the requested capacity as PaPs. This led to a volume of pre-booked capacity of 6.1 million PaP-km. The remaining 5% of requests were addressed with tailor-made paths. In addition to the PaP requests, a high amount of connected feeder and outflow paths were also requested and successfully allocated.

RFC NORTH SEA – MED

For TT2026, a total of 36.3 million PaP-km was offered. The volume of requested capacity (PaPs) amounted to 13.7 million PaP-km. This corresponds to 37.7% of the total offered freight capacity. Due to conflicts between some requests, 98% of the requested capacity could be allocated as PaPs. In addition to the requests for PaPs, a significant number of connected feeder and outflow paths were requested and allocated, ensuring a comprehensive network coverage. The objective was to reach a threshold of 50% of the capacity requests compared to the published capacity.

Figure 11
Volume of offered, requested and pre-booked capacity



KPI volume of offered and requested RC

This KPI shows the total volume of Reserve Capacity (RC) that has been published by the C-OSS and requested for the timetables covering the years 2022 to 2026. It provides insight into the availability of additional capacity reserved for potential demand, allowing for analysis of trends over time and evaluation of how well the published capacity aligns with actual capacity requests.

RFC RHINE – ALPINE

The published Reserve Capacity has remained nearly stable in recent years, with only minor variations resulting from temporary capacity restrictions. Despite its continuous availability, as operators tend to prefer requesting ad hoc train paths at shorter notice. KPI number of requests is not shown here as volume of request is 0 for 2025

RFC NORTH SEA – MED

The published Reserve Capacity has steadily increased from 2.2 in 2022 to 8.47 in 2026, with a particularly significant rise between 2025 and 2026. Despite this growth in offered capacity, the volume of requested RC remains extremely low, ranging from 0 to 0.02, with no data available for 2026 as reservations are still open. This demonstrates a substantial gap between the capacity made available and the capacity actually requested via the RFC using the PCS tool. KPI number of requests is not shown here as volume of request is 0 for 2025.

The data indicates either limited demand for RC or potential obstacles preventing users from submitting requests. However, this point should be nuanced as a substantial part of the Reserve Capacity is used by IMs to reroute trains due to TCRs on their own or neighboring network. Additional usage includes spot trains or new traffic. This demonstrates a continued need to maintain an ambitious RC catalogue in order to safeguard capacity for freight transport. The objective of offering at least 10% of the PaP capacity as RC has been met.

	TT 2022	TT 2023	TT 2024	TT 2025	TT 2026
Volume of offered RC (in million path km)	1.80	1.80	1.65	1.71	1.75
	2.20	3.96	3.97	4.30	8.47
Volume of requested RC	0.00	0.00	0.00	0.00	N/A
	0.02	0.00	0.02	0.00	N/A

Figure 12
Volume of offered and requested
Reserve Capacity

KPI number of requests (PaP) including number of conflicts at X-8

This KPI shows the number of conflicting and clean requests (i. e., dossiers) made by the applicants in the Path Coordination System (PCS).

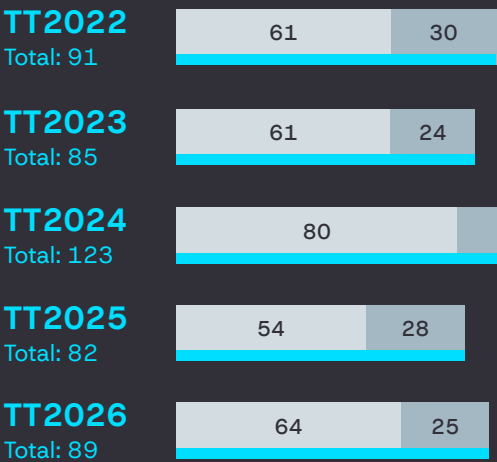
RFC RHINE – ALPINE

The number of requested dossiers for TT2026 increased by 7 dossiers compared to the previous year. There were 25 conflicting PaP requests. All applicants that could not receive a PaP after the conflict solving process were answered with a tailor-made path offer.

RFC NORTH SEA – MED

Although the volume of PaP-Km has slightly decreased, there is an important increase of the number of requests (+18%). In addition, the RFC allows national capacities with international character to be booked via PCS. As a result, many capacities have been booked between the North Sea ports and the South-East of Belgium via the Athus-Meuse line.

Clean / In Conflict



Clean / In Conflict

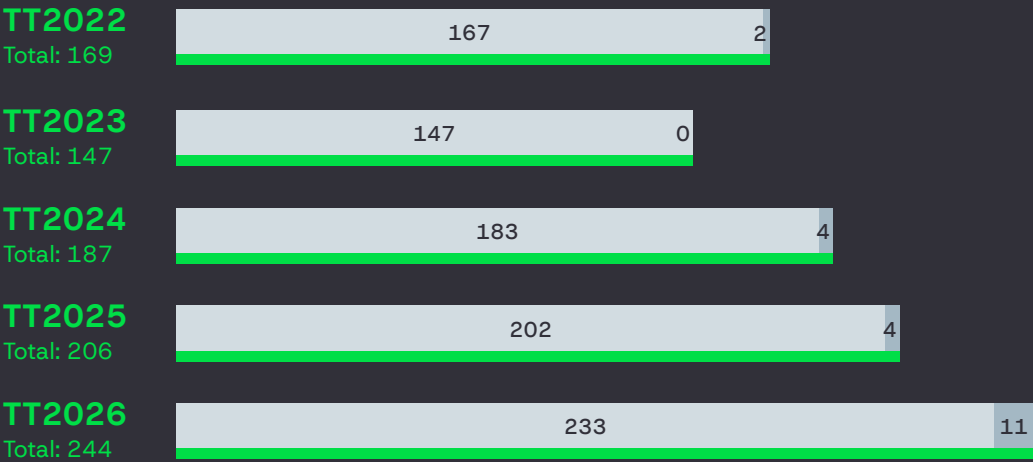


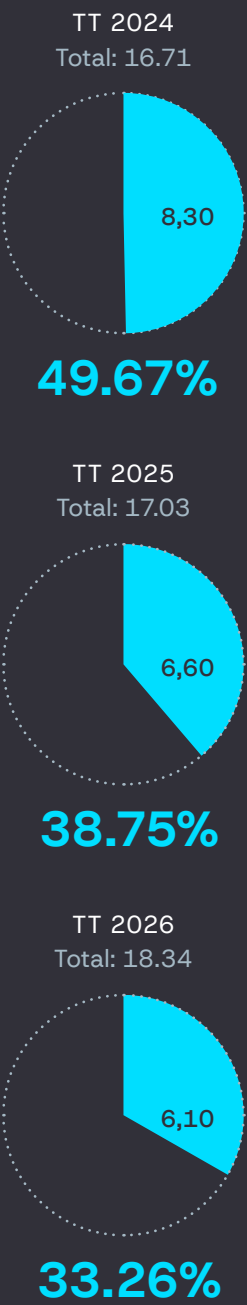
Figure 13
Number of PaP conflicting and clean PaP requests

Ratio of pre-booked capacity

This KPI shows the ratio of the volume of pre-booked capacity (at X-7.5) to the volume of offered capacity at X-11 (PaPs).

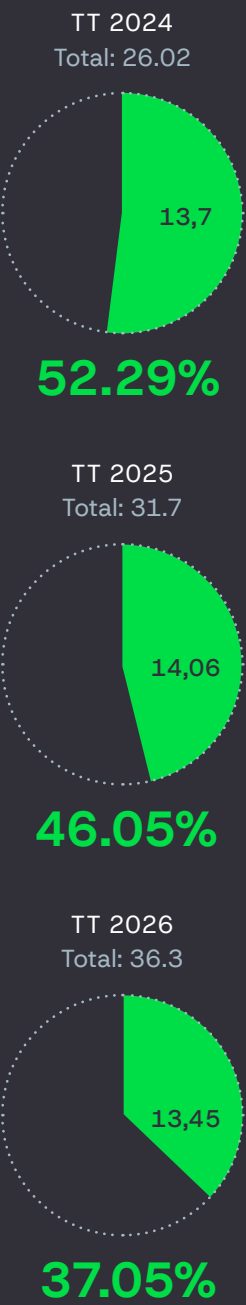
RFC RHINE – ALPINE

In TT2026, a total of 18,34 million PaP-km was offered. The volume of pre-booked (PaPs) amounted to 6,10 million PaP-km. The volume of the ratio is 33% compared to 39 % for TT2025.



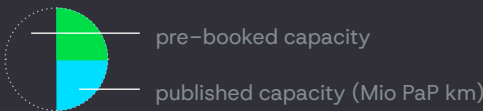
RFC NORTH SEA – MED

In TT2026, a total of 36.3 million PaP-km was offered. The volume of pre-booked (PaPs) amounted to 13.45 million PaP-km. This corresponds to 37.05% of the total offered freight capacity.



published capacity
(Mio PaP km)

Figure 14
Ratio of pre-booked capacity



KPI average planned speed of PaPs for TT 2026

The KPI Average Planned Speed of PaPs shows the average of the planned commercial speed of the PaPs in km/h for selected connections. The selected origin-destination (O/D) relations serve as examples.

The KPI is calculated by dividing the length of each PaP by its planned travel time. As a result, the average planned speed of PaPs reflects operational conditions including necessary stops along the route as well as sections with speed restrictions, for example in urban areas.

RFC RHINE – ALPINE

On RFC Rhine – Alpine, it was constantly adjusted from year-to-year to better meet the needs of IMs and applicants. These adjustments take into account, for example, required stops for train drivers and necessary waiting times at borders on that O/D relation. Thus, increasing the speed of a PaP does not directly imply an improvement in quality. The PaPs running on the respective O/D have to cover the entire section to be included into the calculation. At some borders, longer stopping times may occur, for instance due to customs procedures or operational changes requested by applicants. This results in a lower average speed compared to borders without dwelling time. Further connected O/Ds would show hardly any difference in planned speed (e. g. Amsterdam instead of Maasvlakte).

RFC NORTH SEA – MED

The average speed are relatively stable which is logical as no major infrastructure improvements have occurred on these lines since a few years. Stops for train drivers or necessary waiting times at borders on that O/D relation are considered. Thus, increasing the speed of a PaP does not directly lead to better quality. The PaPs running on the respective O/D have to cover the entire section to be included into the calculation. At some borders, longer stopping times may occur, for instance due to customs procedures or operational changes requested by applicants. This results in a lower average speed compared to borders without dwelling time.

Figure 15

KPI average planned speed of PaPs for TT2026

Average Planned Speed of PaPs on RFC Rhine – Alpine (in km/h)	Length of the Stretch (km)	TT 2023	TT 2024	TT 2025	TT 2026
Maasvlakte → Oberhausen Sterkrade	228.1	70.8	71.5	71.3	71.3
Y. Schijn → Dorsfeld	211.3	46.1	45.7	46.6	47.7
Basel SBB RB → Novara B.to	339.5	39.6	42.1	37.3	42.5
Troisdorf → Basel SBB RB	509	61.3	62.7	62.3	60.7
Karlsruhe GBF → Gallarate	519.4	51	50.8	50.7	51.0
Maasvlakte → Milano SM	1148.3	53.9	56.2	56.2	55.8
Y. Schijn → Milano SM	1092.9	50.5	52.5	51	50.8
Basel SBB RB → Milano SM	330.3	47.8	49	47.1	48.3
Basel SBB RB → Chiasso SM	274	58.6	57.9	58.1	58.8

Average Planned Speed of PaPs on RFC North Sea – Med (in km/h)	Length of the Stretch (km)	TT 2023	TT 2024	TT 2025	TT 2026
Antwerp → Basel	748.8	59.4	61.2	55.4	57.3
Antwerp → Bettembourg	343.7	57.4	57.8	56.7	58.0
Antwerp → Uckange via Artère Nord Est	395.1	63.1	64.8	63.3	60.0
Rotterdam → Antwerp	74.3	64.8	62.8	62.8	62.5
Metz → Lyon	454.1	71.5	67.6	68.5	65.8
Dunkerque → Liège	311.1	52.7	58.7	74.3	52.8
Antwerp → Paris	403.7	43.2	39.2	44.7	48.0
Mont St. Martin → Basel	425.9	n.a.	n.a.	56.9	60.0
Antwerp → Lille	125.4	n.a.	n.a.	n.a.	43.6
Lille → Paris	247.3	n.a.	n.a.	n.a.	57.1

KPI ratio of capacity allocated by C-OSS and the total allocated capacity

The KPI ratio of the capacity allocated by the C-OSS and the total allocated capacity is calculated using data provided by the IMs and the C-OSS of the former RFC Rhine – Alpine and North Sea – Mediterranean, after the allocation process is finalised. This KPI illustrates the number of trains allocated in the yearly timetable by the C-OSS per RFC border, divided by the total number of allocated international freight trains in the yearly timetable per RFC border, as recorded via PCS or national systems and allocated by the IMs along the Corridor.

RFC RHINE – ALPINE

The number of the requested capacity via Aachen / Montzen increased drastically for TT2026. In relation to the decreased amount of requested capacity, the numbers of allocated capacity per border changes intensively for e. g. in Emmerich, Chiasso Sm & Domo II.

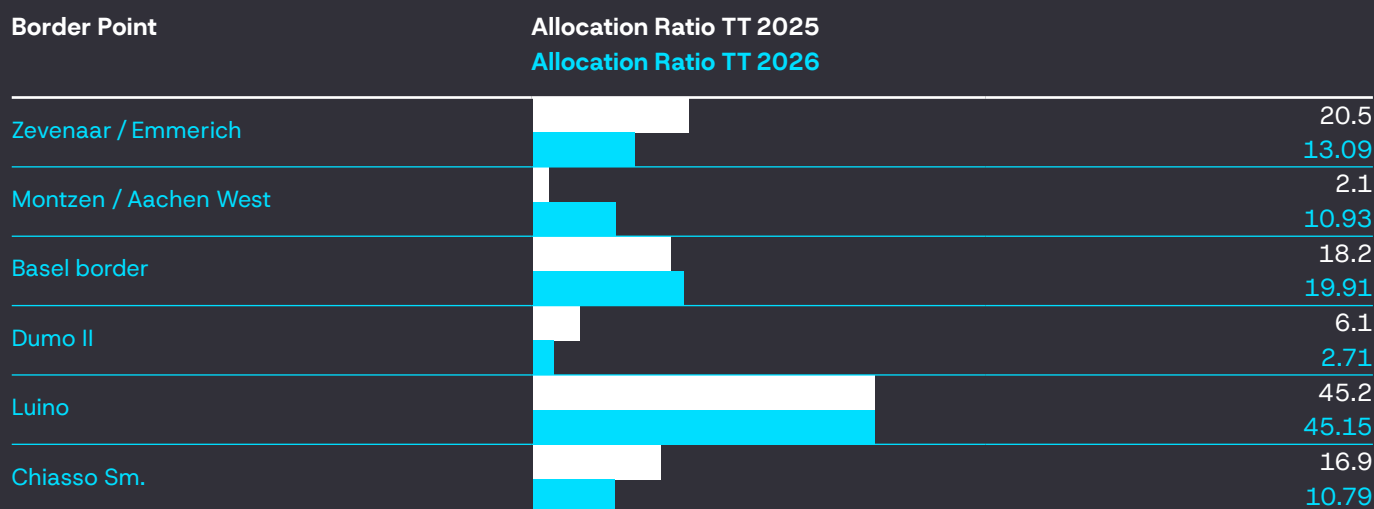
RFC NORTH SEA – MED

The ratios are relatively stable. TCRs for the 4 Meter Corridor between Basel St-Johann and Basel Marshalling yard have led to a more difficult repartition of the capacity between France & Switzerland.

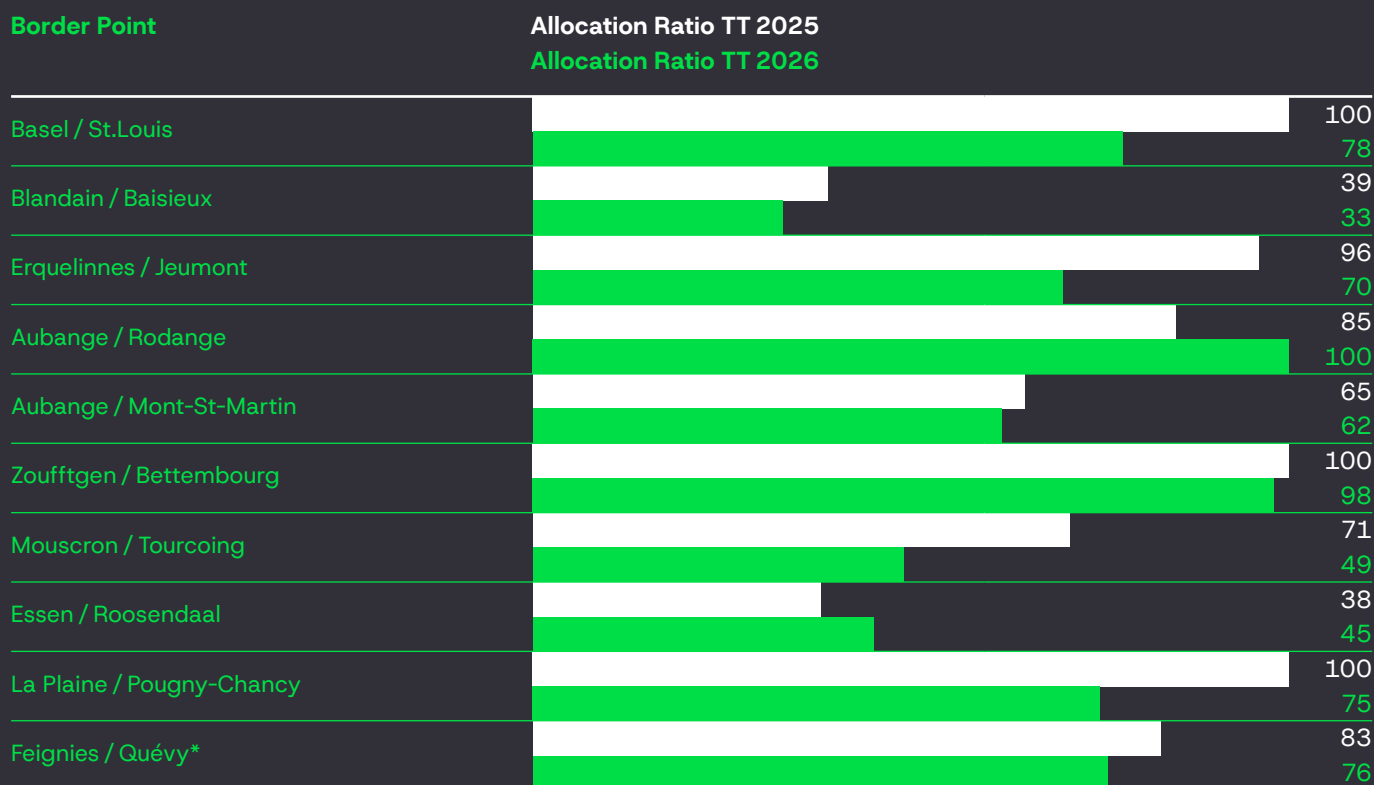
Figure 16

KPI ratio of capacity allocated by C-OSS and the total allocated capacity

RFC Rhine – Alpine



RFC North Sea – Med



* Figures for Feignies/Quévy are mentioned, even though the border does not officially make part of RFC NSM lines. This way, overall evolution of cross-border freight services can better be monitored

4 Outlook 2026





The year 2026 will mark the first year in which RFC NSRM will become fully operational, following the successful completion of its administrative and organisational establishment. With the structural foundations now in place, the Corridor will increasingly focus on operational priorities and the delivery of tangible value for the market.

The strategic direction for 2026 and the coming years was defined during the MB Strategy Workshop in September 2025 and further reinforced at the CEO Meeting in November 2025. Our guiding principles going forward are:

- Strengthening international cooperation between Infrastructure Managers and business partners;
- Leveraging modern digital tools to enhance transparency.
- Fully integrating market needs into the overall strategy.

Within this framework, three thematic priorities will be at the centre of the Corridor work.

CAPACITY MANAGEMENT AND THE WORK OF THE C-OSS

We aim to continuously improve our capacity products (PaP, RC and LPR) and further increase their visibility for customers. To help the customers in the best way possible, we assist with and train the usage of the Path Coordination System (PCS) to secure an easy access for the customers within the requests for capacity along the RFC. In light of the upcoming Rail Capacity Regulation, the Corridor will also contribute its international expertise to help align customer requirements with the operational needs of Infrastructure Managers.

COORDINATION OF INFRASTRUCTURE WORKS

The Corridor will develop measures together with infrastructure managers to identify critical combinations of construction works along the entire corridor and to strengthen cross-border coordination. Additional support is expected from the TCR application developed by RNE, which is scheduled for release in the course of the year. Furthermore, the Corridor is actively involved as Co-Lead in the Rhine Valley Task Force, which is working on the planning and implementation of diversion traffic during the major closures of the Rhine Valley railway line in south-west Germany between 2027 and 2029.

TRAIN PERFORMANCE MANAGEMENT

Our primary focus will be on meeting the new operational TEN-T priorities related to punctuality and well times. To support these priorities, we plan to establish a new monitoring framework and subsequently work with our customers and the relevant ministries to identify and implement improvement measures.

List of Abbreviation

AB	Allocation Body
ACF	Administration des chemins de fer
CCS	Control Command and Signalling (TSI)
CFL	Société Nationale des Chemins de Fer Luxembourgeois
CIP	Customer Information Platform
Coreper	Comité des Représentants Permanents Committee of Permanent Representatives
C-OSS	Corridor One-Stop-Shop
EEIG	European Economic Interest Grouping
ERTMS	European Rail Traffic Management System
ERA	European Union Agency for Railways
ETC	European Transport Corridor
ETCS	European Train Control System
EU	European Union
ExBo	Executive Board
FRMCS	Future Railway Mobile Communication System
HLIM	High-Level Infrastructure Meeting
ICM	International Contingency Management
IRG-Rail	Independent Regulators' Group-Rail
IM	Infrastructure Manager
LPR	Lath Path Request
MB	Management Board
MoT	Ministry of Transport
MoU	Memorandum of Understanding
NExBo	Network of Executive Boards of RFCs
NR / NTR	National Rule / National Technical Rule
NSA	National Safety Authority
NSM	RFC North Sea – Mediterranean
NSRM	RFC North Sea – Rhine – Mediterranean
O/D	Origin / Destination

S

OH	Operational Harmonisation
PaP	Pre-arranged Path
PCS	Path Coordination System
PMO	Programme Management Office
QCO	Quality Circle Operation
RAG	Railway Undertaking Advisory Group
RALP	RFC Rhine – Alpine
RAN	Rhine – Ardennes – North Sea
RC	Reserve Capacity
R-CDM	Railway Collaborative Decision Making
RFC	Rail Freight Corridor
RINF	Register of Infrastructure
RIS	Railway Infrastructure System
RISC	Rail Interoperability and Safety Committee
RNE	RailNetEurope
RU	Railway Undertaking
ScanMed	RFC Scandinavian-Mediterranean
SNCF Réseau	Société Nationale des Chemins de fer Français (French IM)
TAG	Terminal Advisory Group
TCR	Temporary Capacity Restriction
TEN-T	Trans-European Transport Network
TF	Task Force
TIS	Train Information System
TMS	Transport Market Study
TSI OPE	Technical Specification for Interoperability: Operation and Traffic Management
TPM	Train Performance Management
TSI	Technical Specifications for Interoperability
TT	Timetable
WG	Working Group



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LE GOUVERNEMENT
DU GRAND-DUCHÉ DE LUXEMBOURG
Ministère de la Mobilité
et des Travaux publics
Administration des chemins de fer

