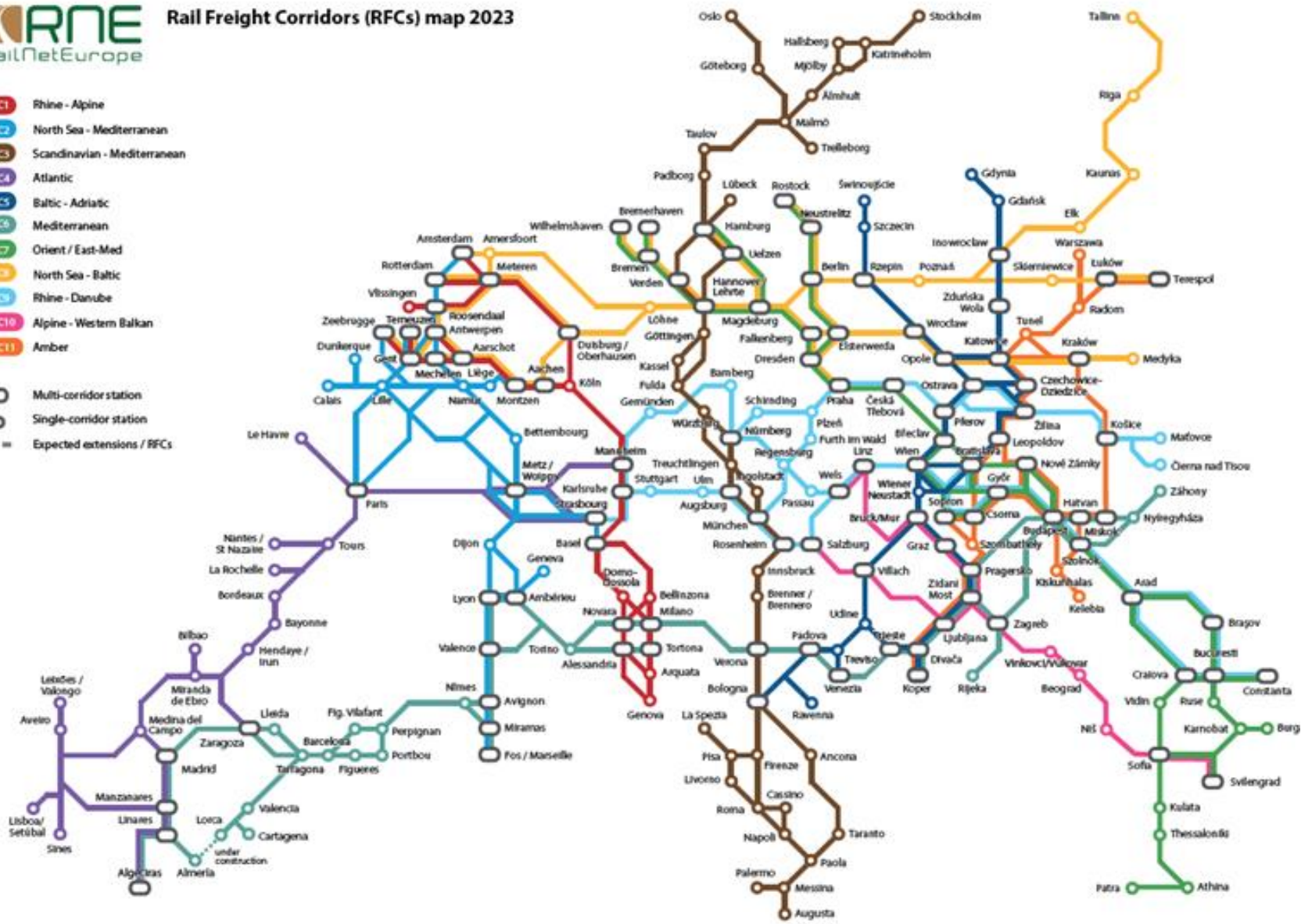


- RFC1 Rhine - Alpine
 - RFC2 North Sea - Mediterranean
 - RFC3 Scandinavian - Mediterranean
 - RFC4 Atlantic
 - RFC5 Baltic - Adriatic
 - RFC6 Mediterranean
 - RFC7 Orient / East-Med
 - RFC8 North Sea - Baltic
 - RFC9 Rhine - Danube
 - RFC10 Alpine - Western Balkan
 - RFC11 Amber
-
- Multi-corridor station
 - Single-corridor station
 - Expected extensions / RFCs



11 RAIL FREIGHT CORRIDORS 2024 JOINT TRANSPORT MARKET STUDY UPDATE

11 RFCs Joint TMS survey - 2023

JANUARY 2024

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11 RFCs Joint TMS survey - 2023

BACKGROUND

11 RFCs Network - 2023

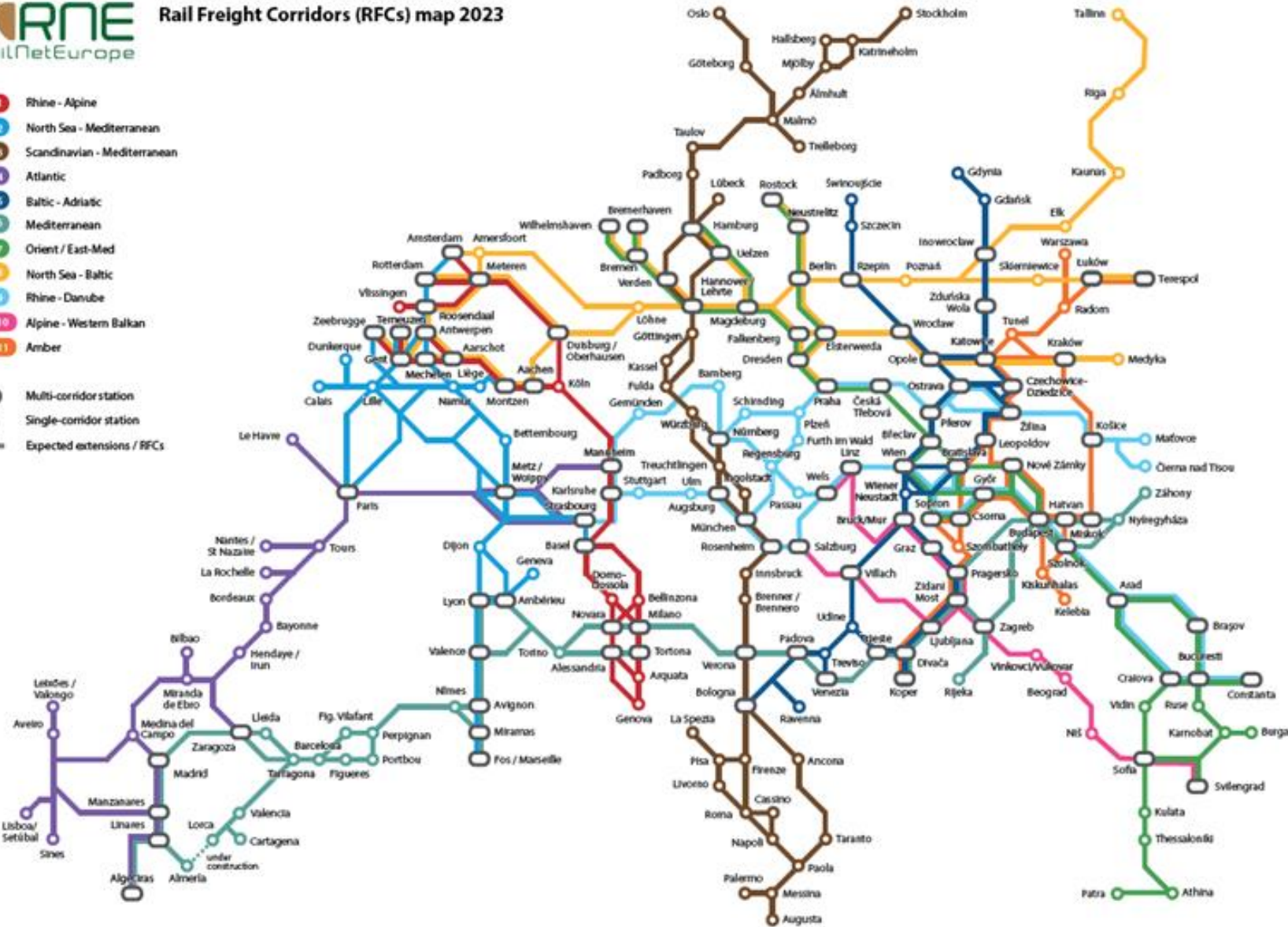
Set up in accordance with Regulation (EU) 913/2010 establishing Rail Freight Corridors (RFCs) across the European Union's Member States, 11 Rail Freight Corridors are currently operational, which represent the key arteries of the European Rail Network for Competitive Freight, interconnecting the main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



Rail Freight Corridors (RFCs) map 2023

- 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

- Multi-corridor station
- Single-corridor station
- — — Expected extensions / RFCs



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

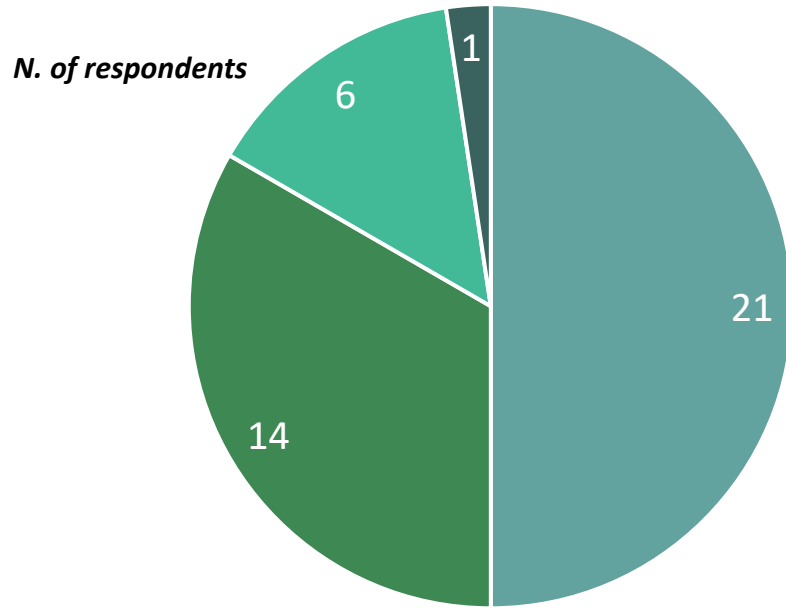
One respondent did not provide details on his company; some of them belong to a same entity

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

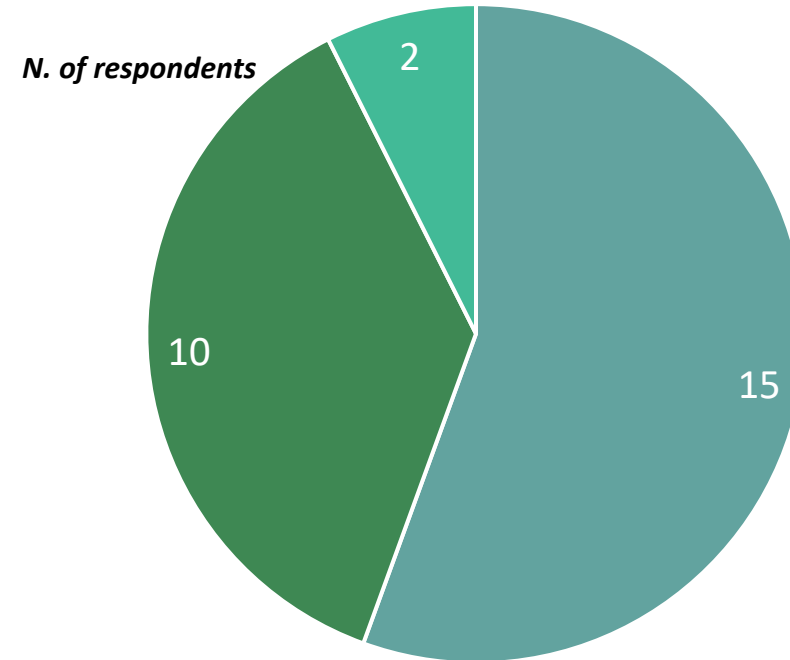
Belonging of company/entity to a group/network both operating railway services and managing/operating terminals

RAILWAY UNDERTAKINGS



- 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*



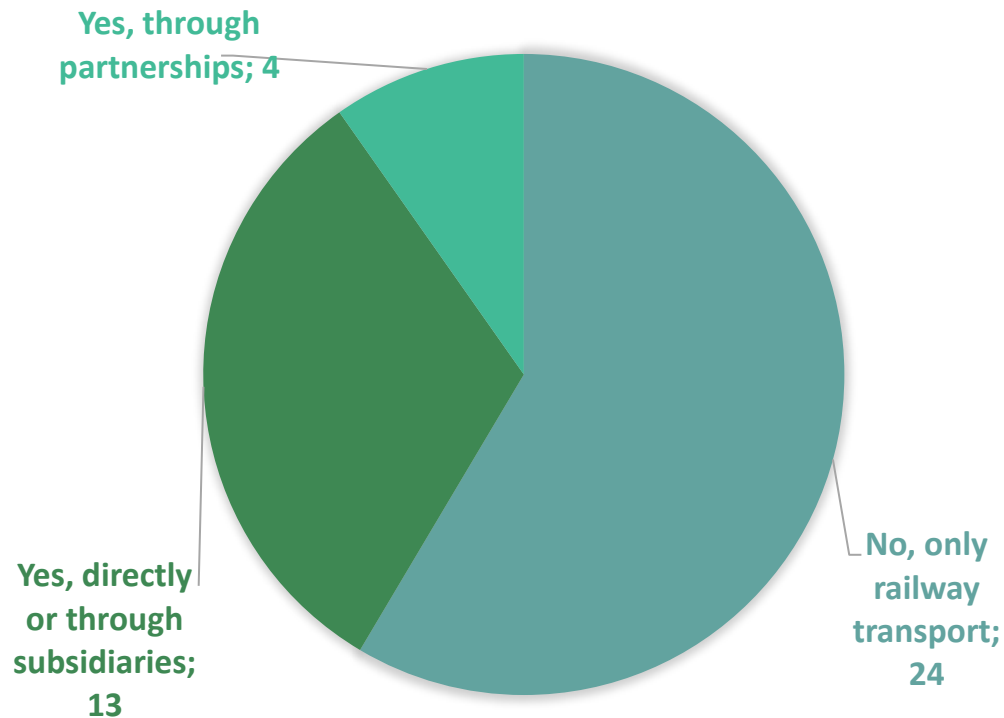
- No, only managing/operating terminals
- Yes, both railway services inside & outside terminals and terminals
- Yes, both railway services inside terminals and terminals

**27 out of 30 respondents*

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

RAILWAY UNDERTAKINGS*

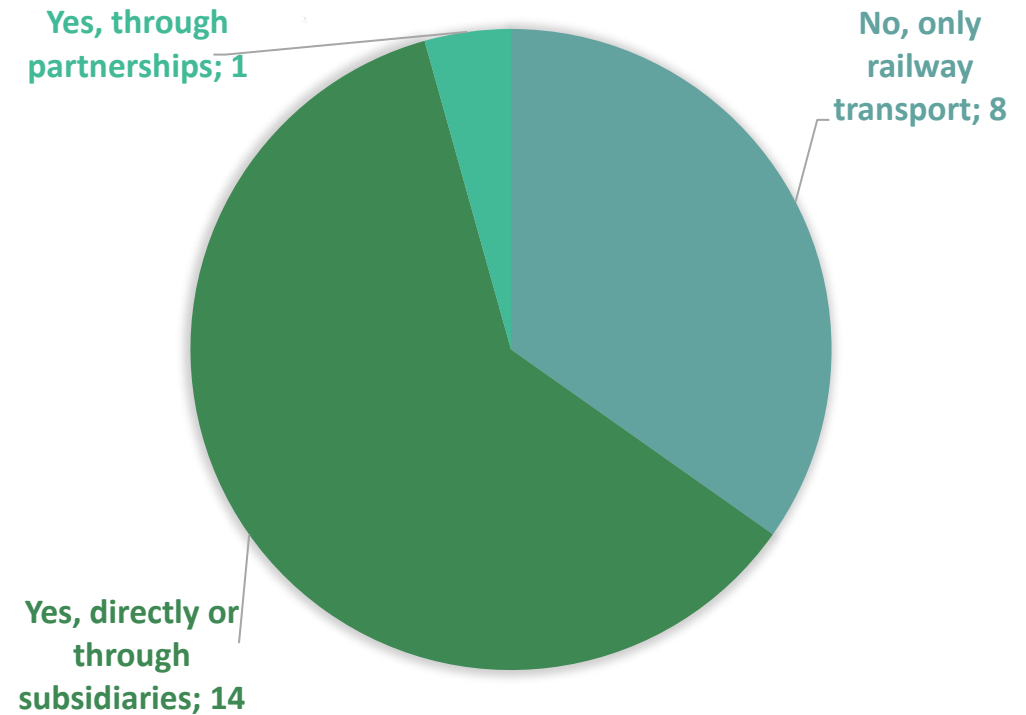
N. of respondents



**41 out of 42 respondents*

TERMINALS**

N. of respondents

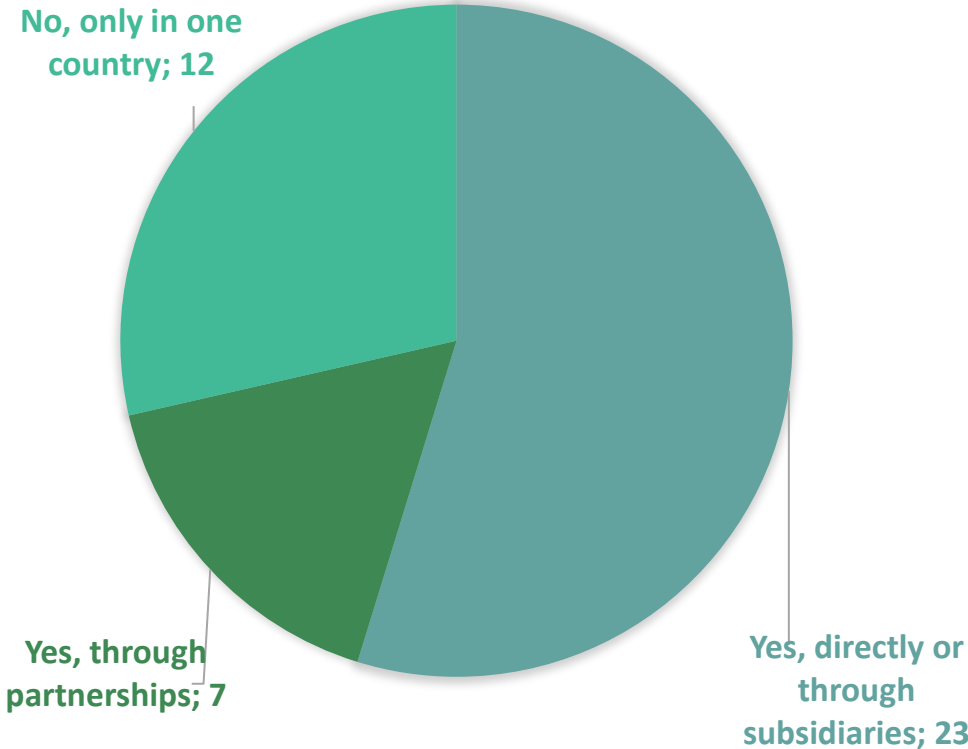


***23 out of 30 respondents*

Respondents' operations in more EU countries

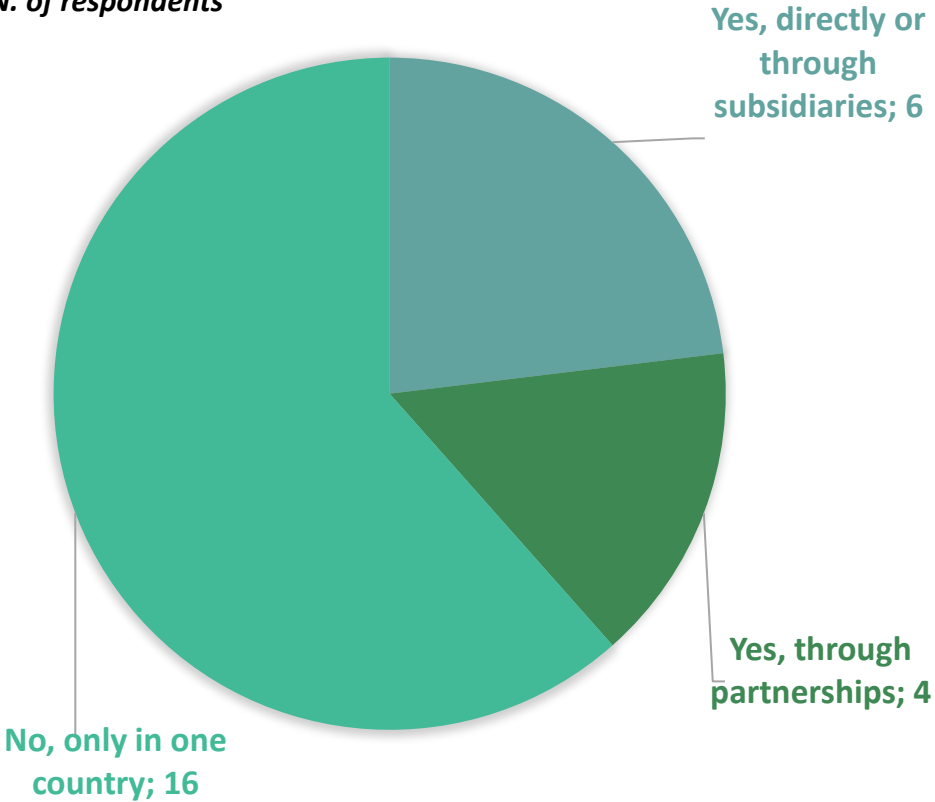
RAILWAY UNDERTAKINGS

N. of respondents



TERMINALS*

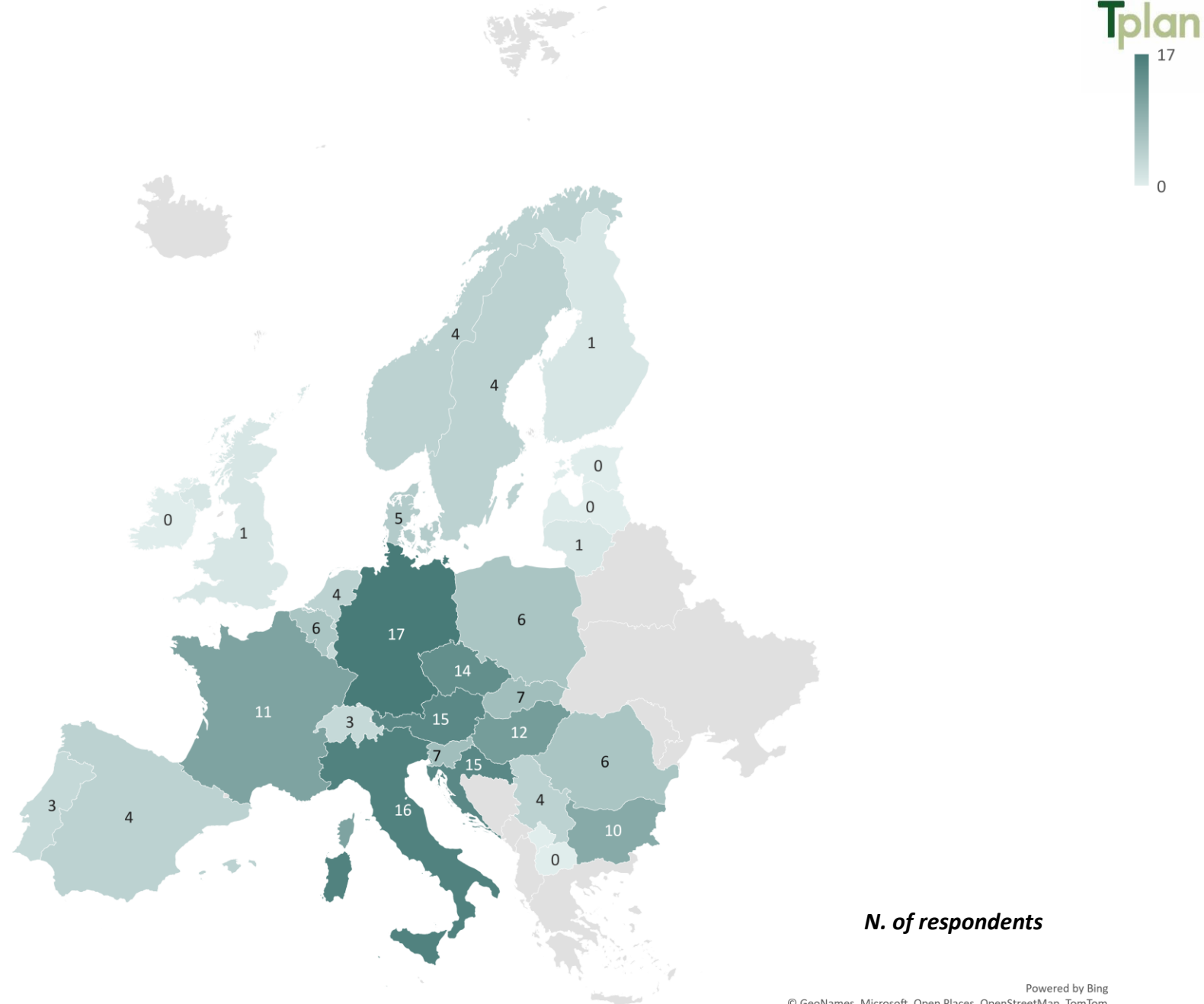
N. of respondents



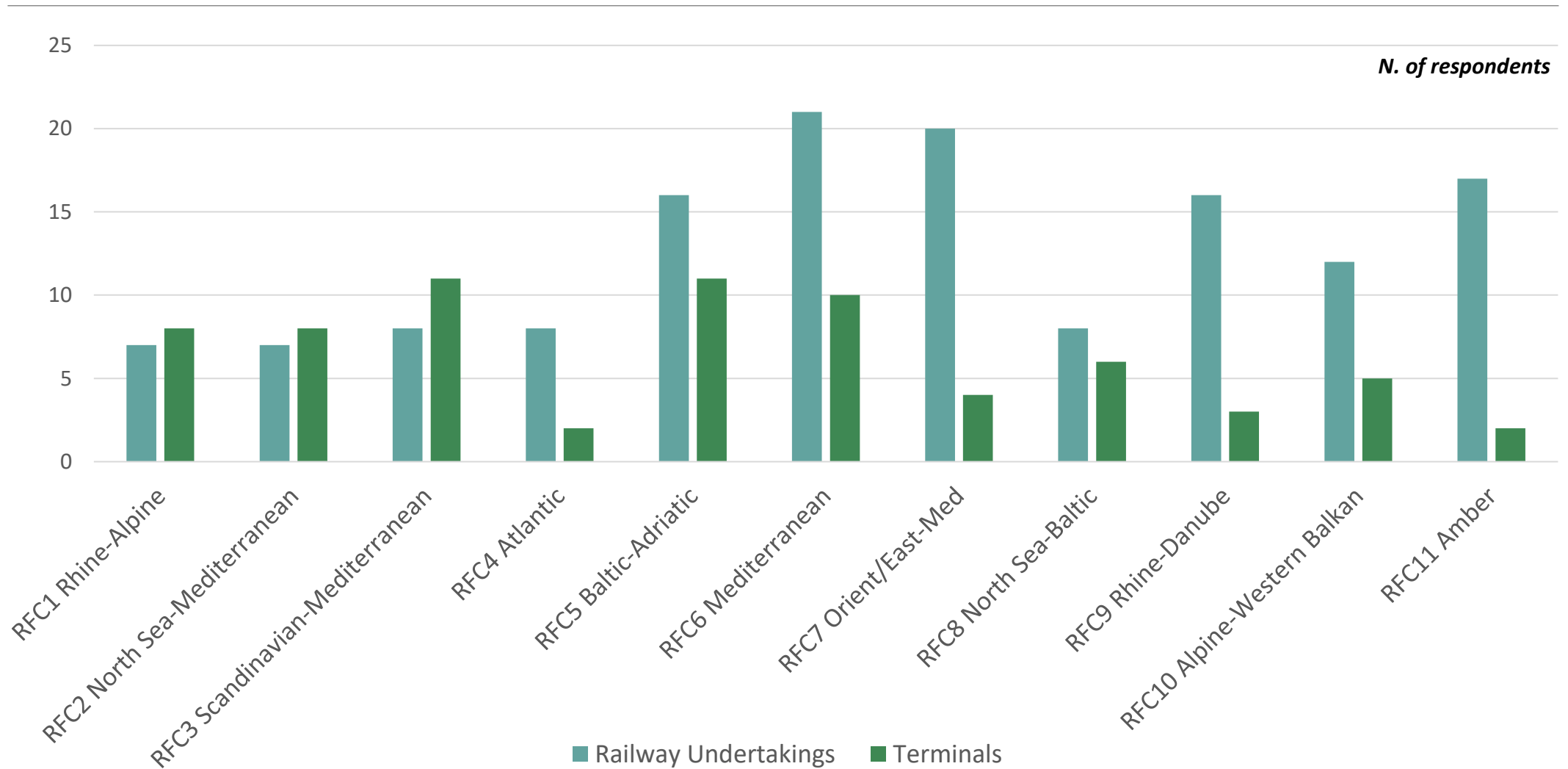
*26 out of 30 respondents

Countries where respondents operate freight railway services/terminals

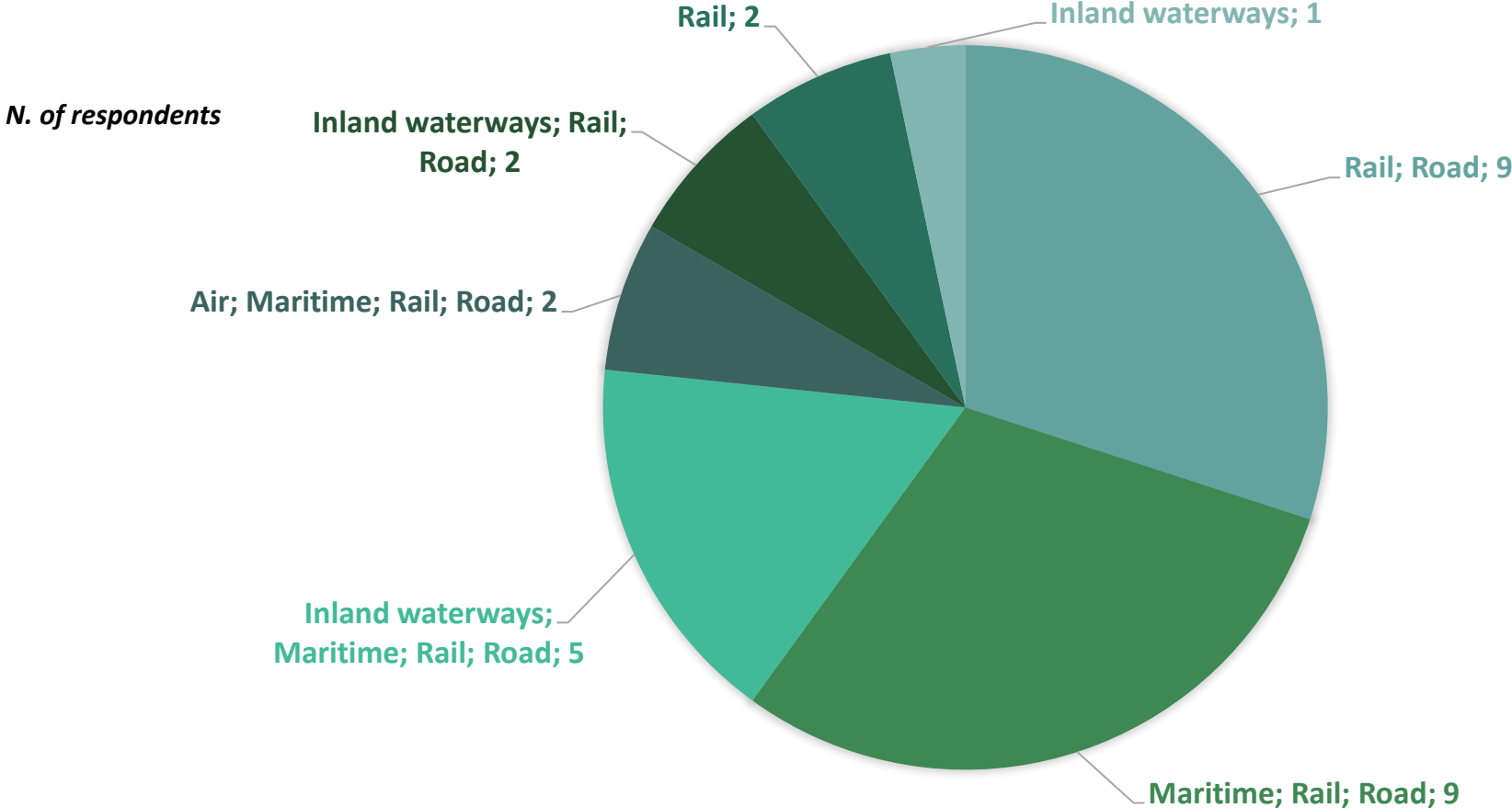
Railway Undertakings and Terminal Operators/Port Authorities



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



Involved transport modes at respondents' terminal(s)



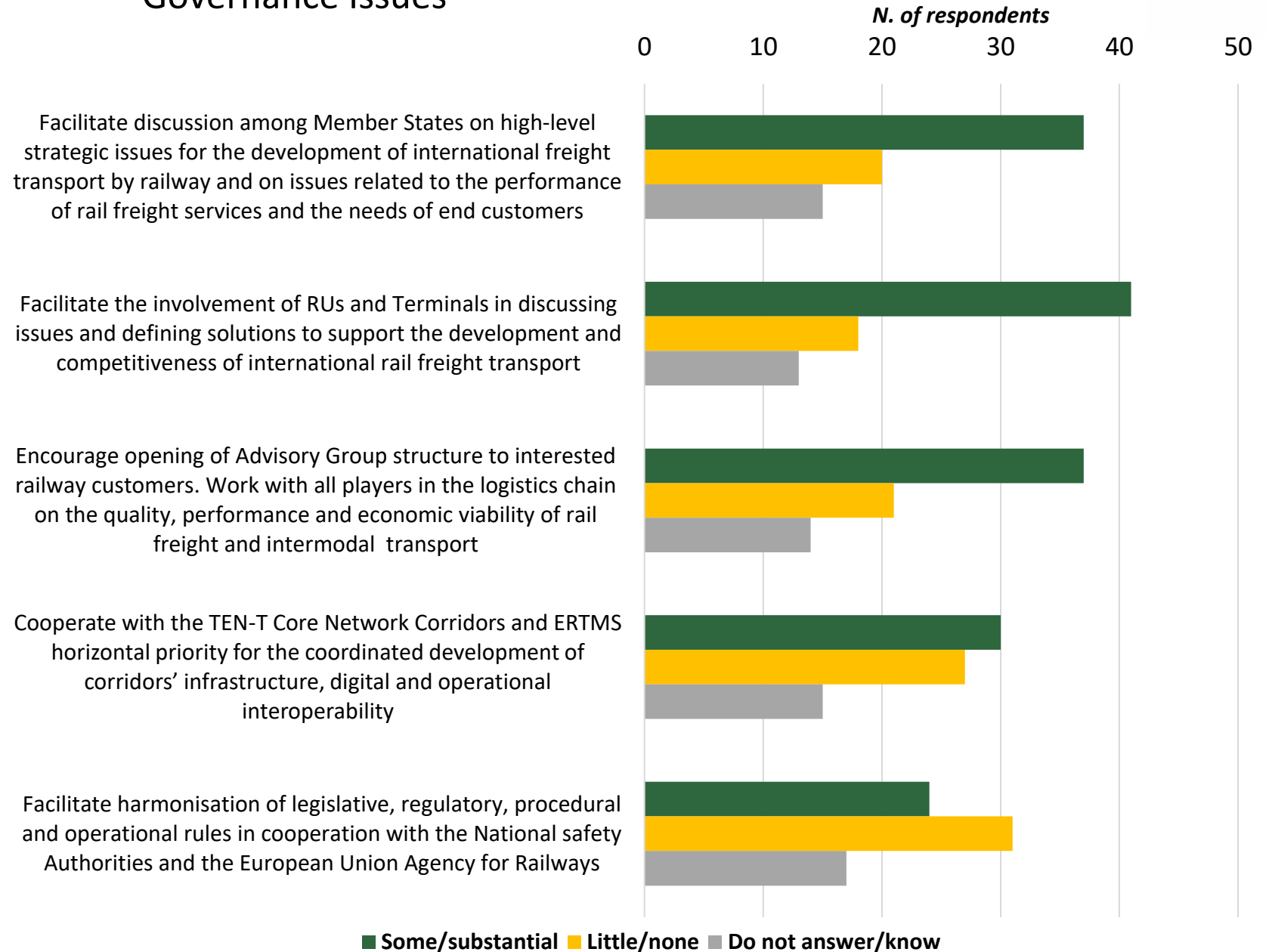
Changes occurred since the establishment of the RFCs and expected changes concerning facilitation of international rail freight transport

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

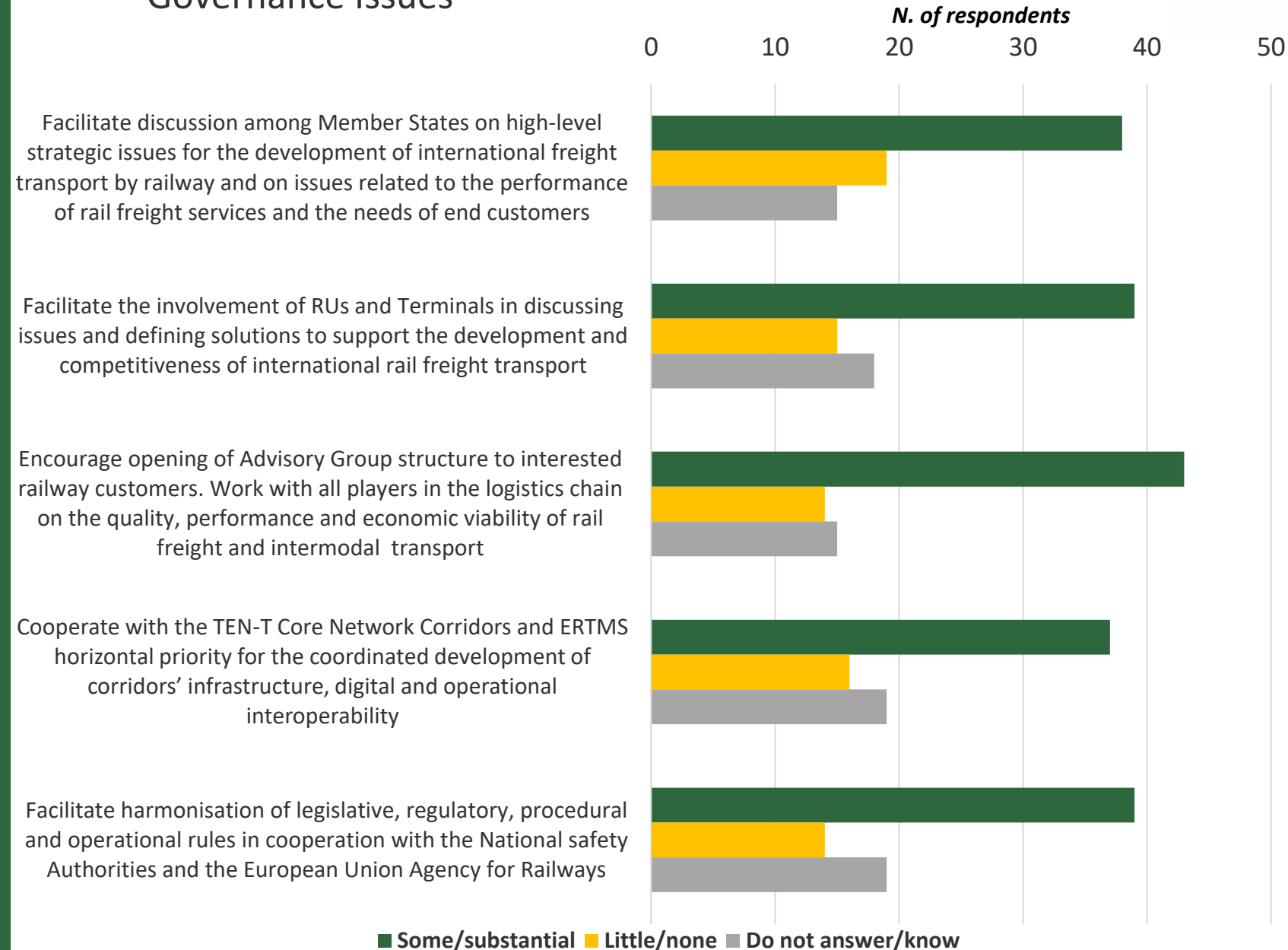
Progress made to date, since the establishment of the RFCs - Governance Issues



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

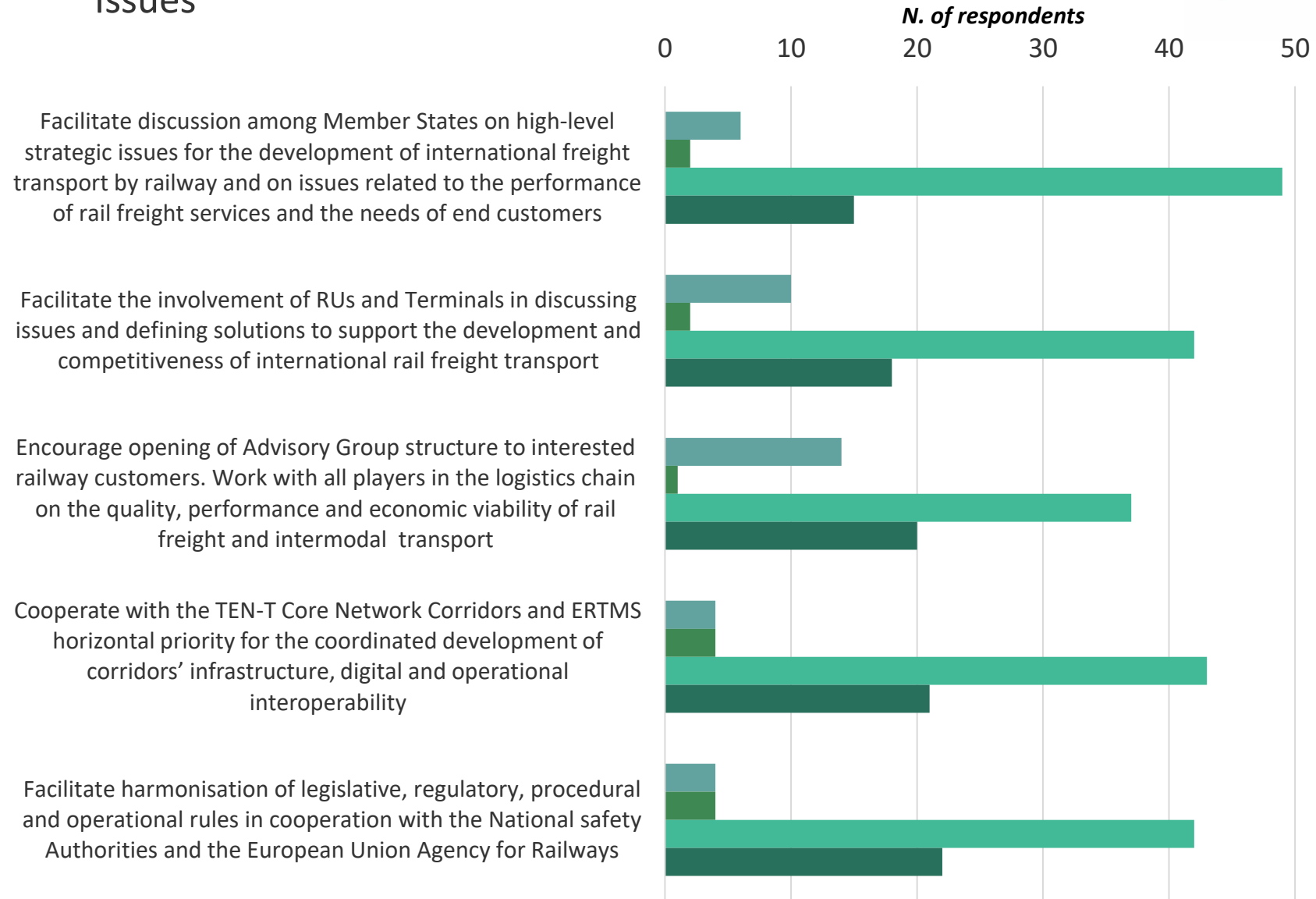


Changes occurred since the establishment of the RFCs and expected changes concerning facilitation of international rail freight transport

GOVERNANCE ISSUES

Best fitting governance to bring issue forward - Governance

Issues

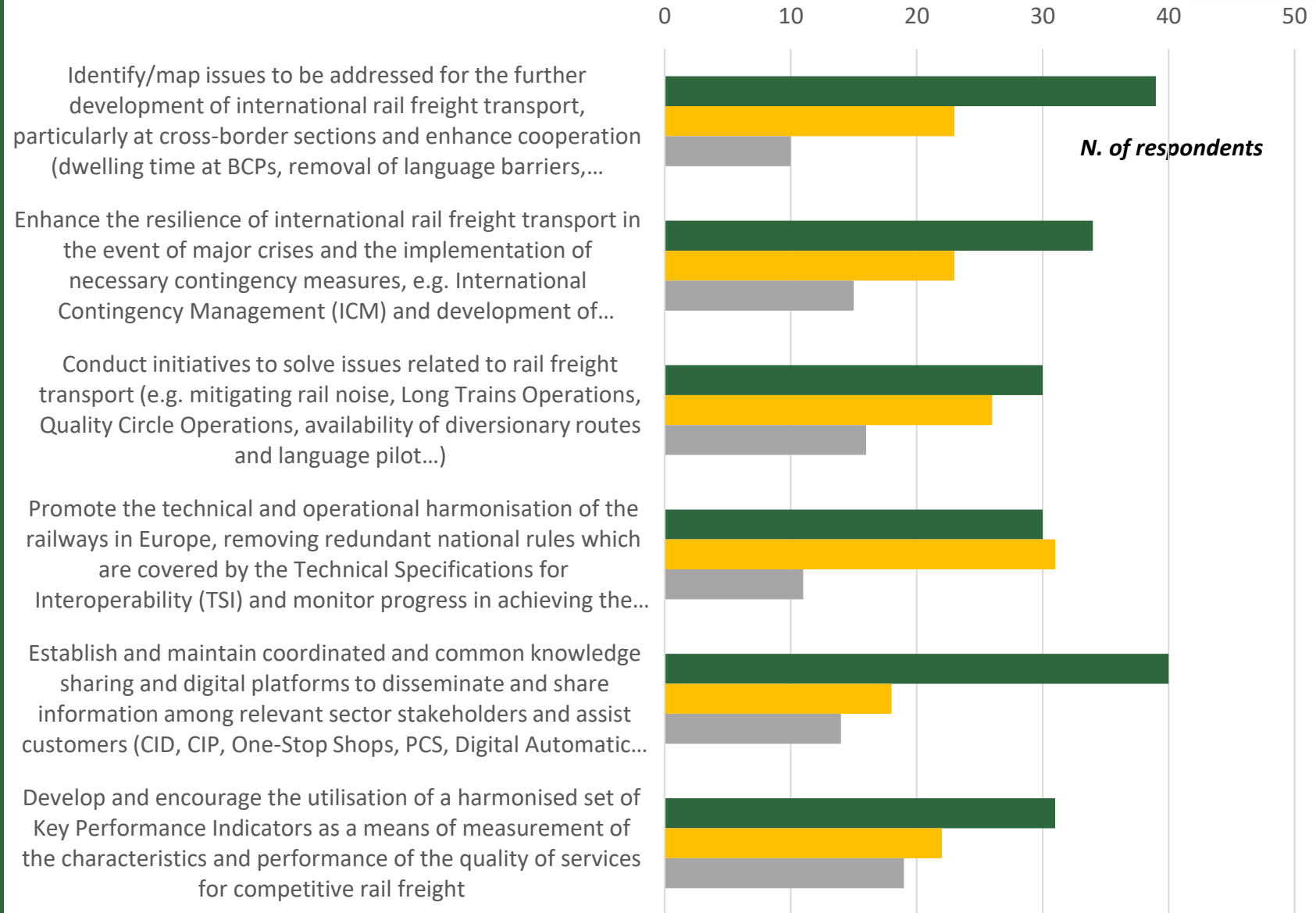


■ RFCs ■ EU Network of IMs ■ Both RFCs and EU Network of IMs ■ Do not know/not answer

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

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

OPERATIONAL EFFICIENCY ISSUES



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

OPERATIONAL EFFICIENCY ISSUES

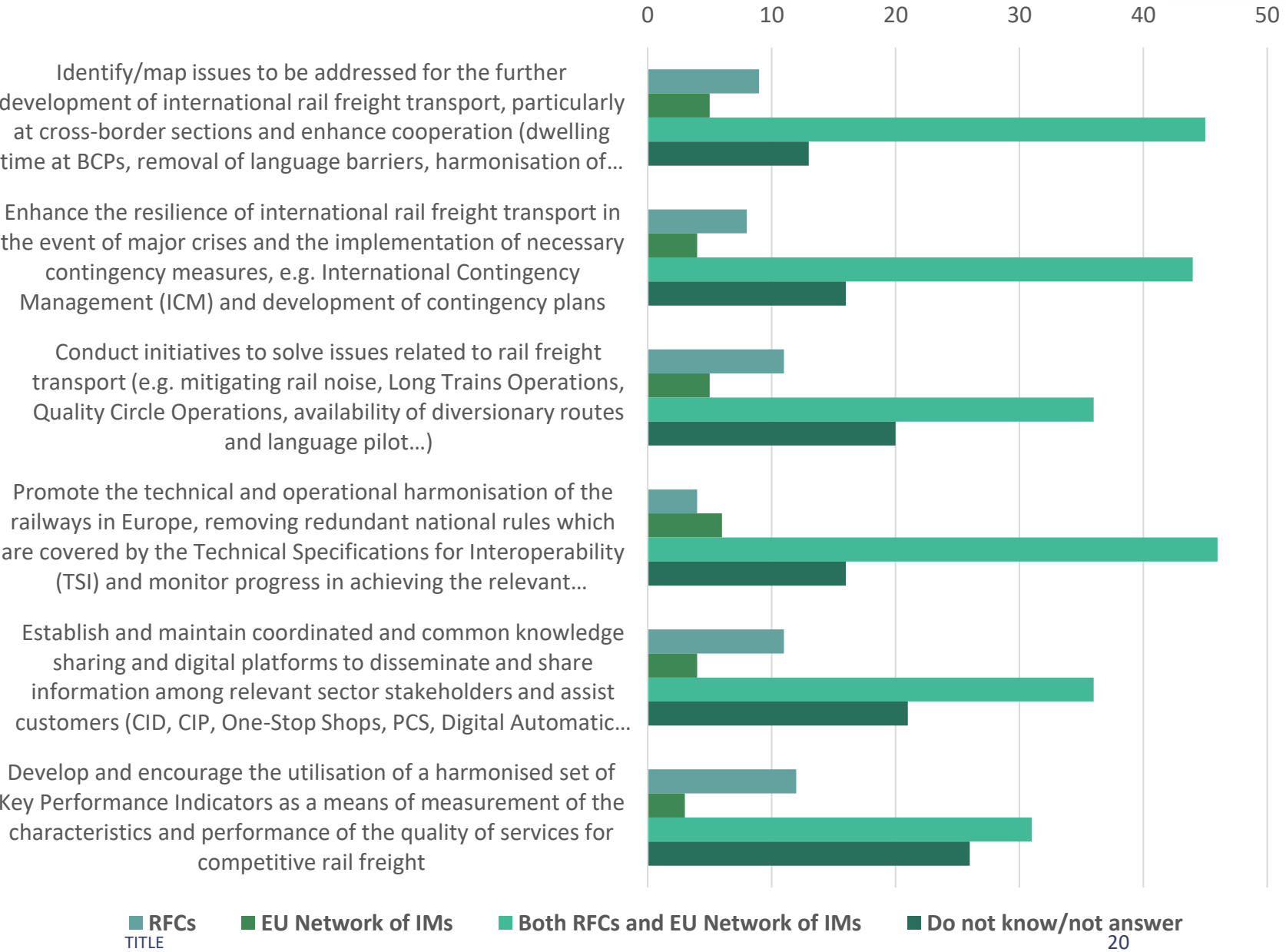
Expected changes based on current programmes / initiatives by RFCs - Operational Efficiency Issues



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

OPERATIONAL EFFICIENCY ISSUES

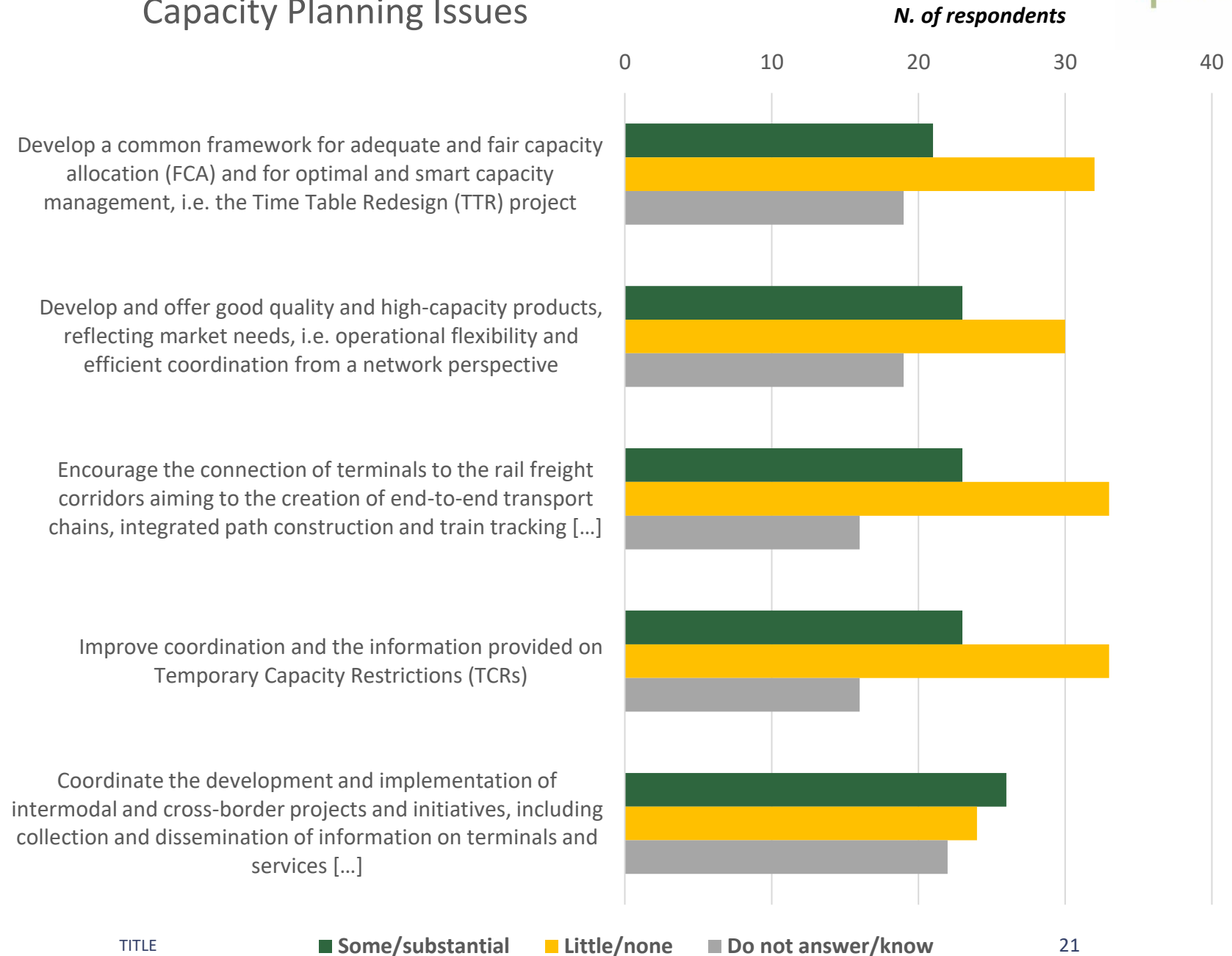
Best fitting governance to bring issue forward RFCs - Operational Efficiency Issues



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

CAPACITY PLANNING ISSUES

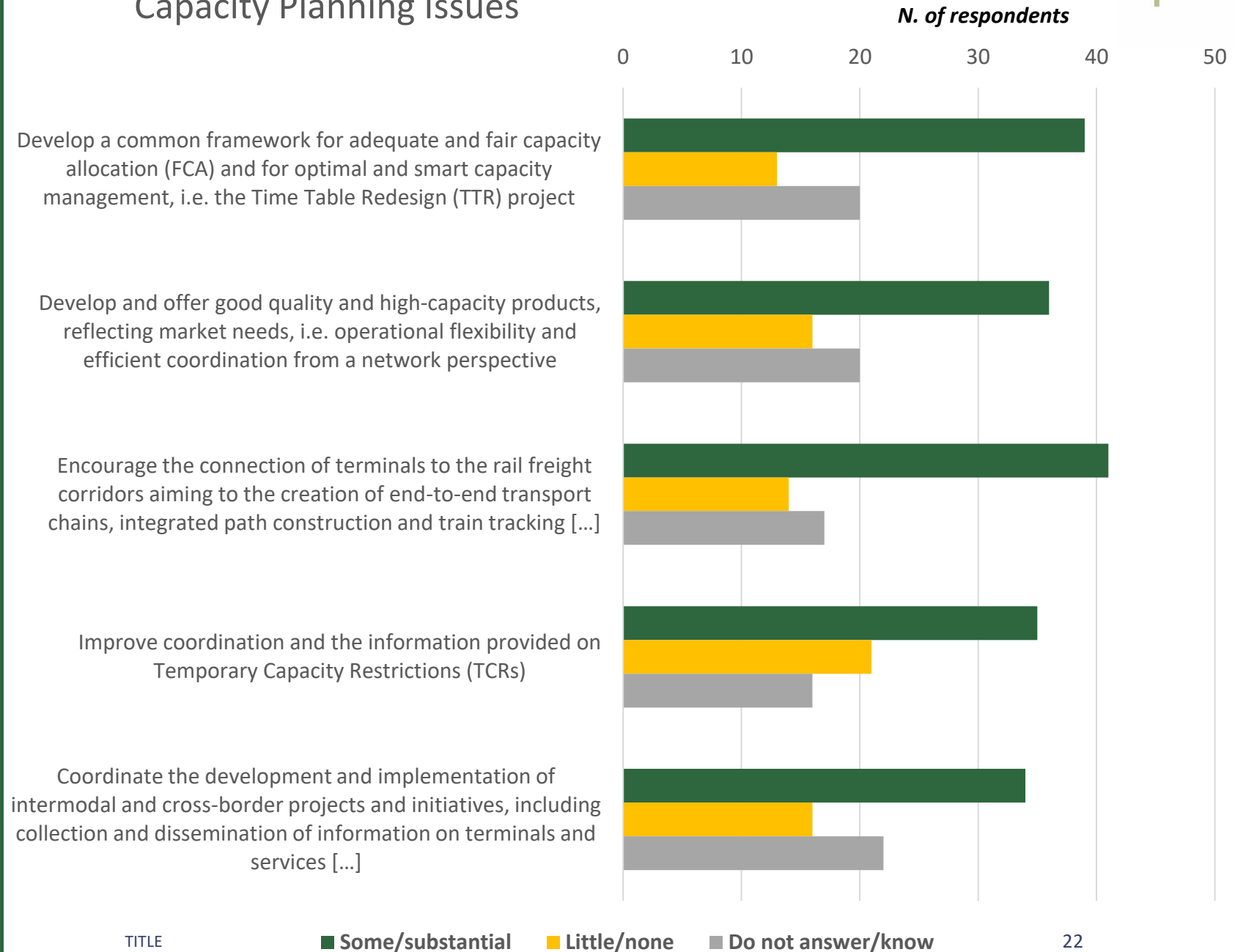
Progress made to date, since the establishment of the RFCs - Capacity Planning Issues



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

CAPACITY PLANNING ISSUES

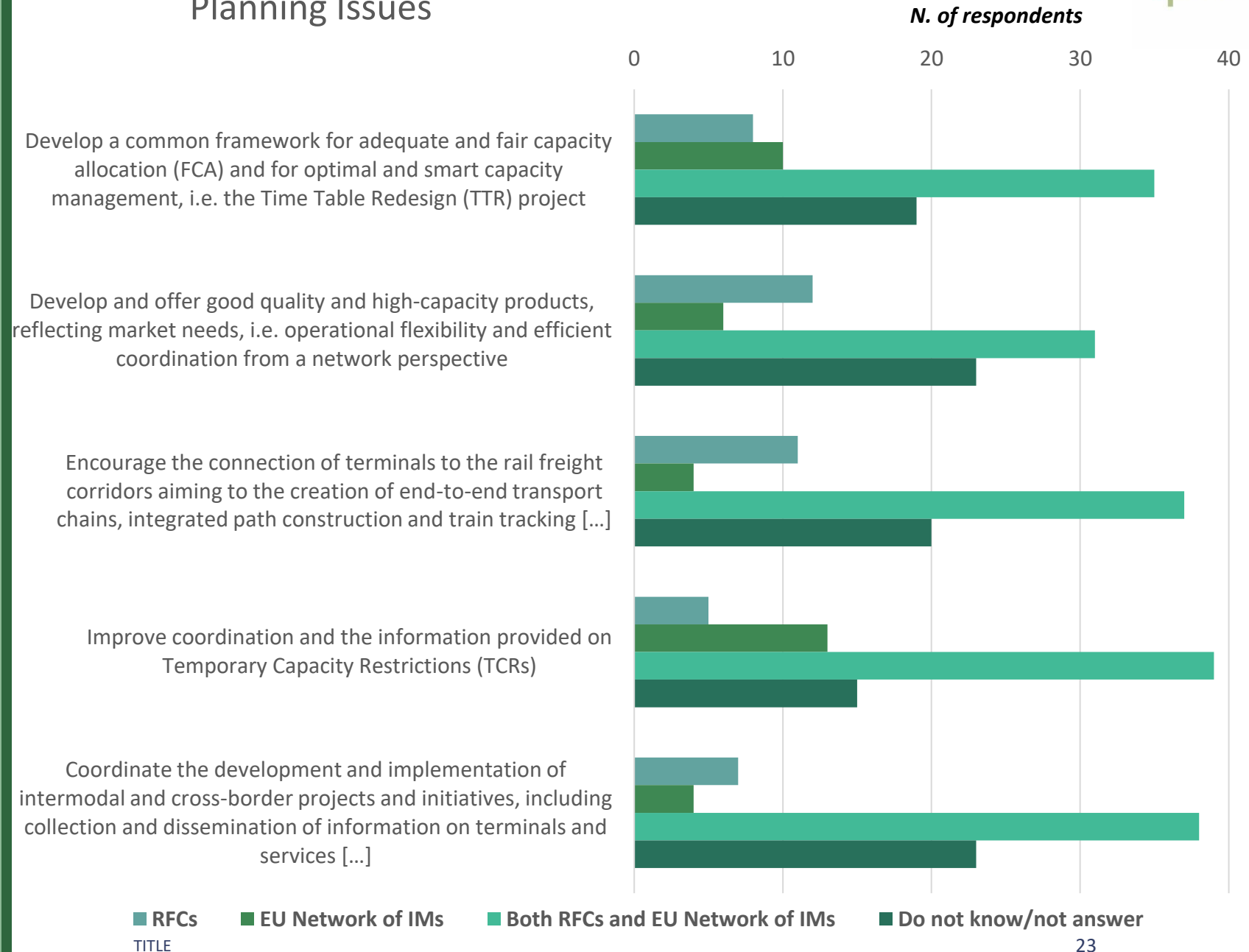
Expected changes based on current programmes / initiatives - Capacity Planning Issues



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



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 (length, 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

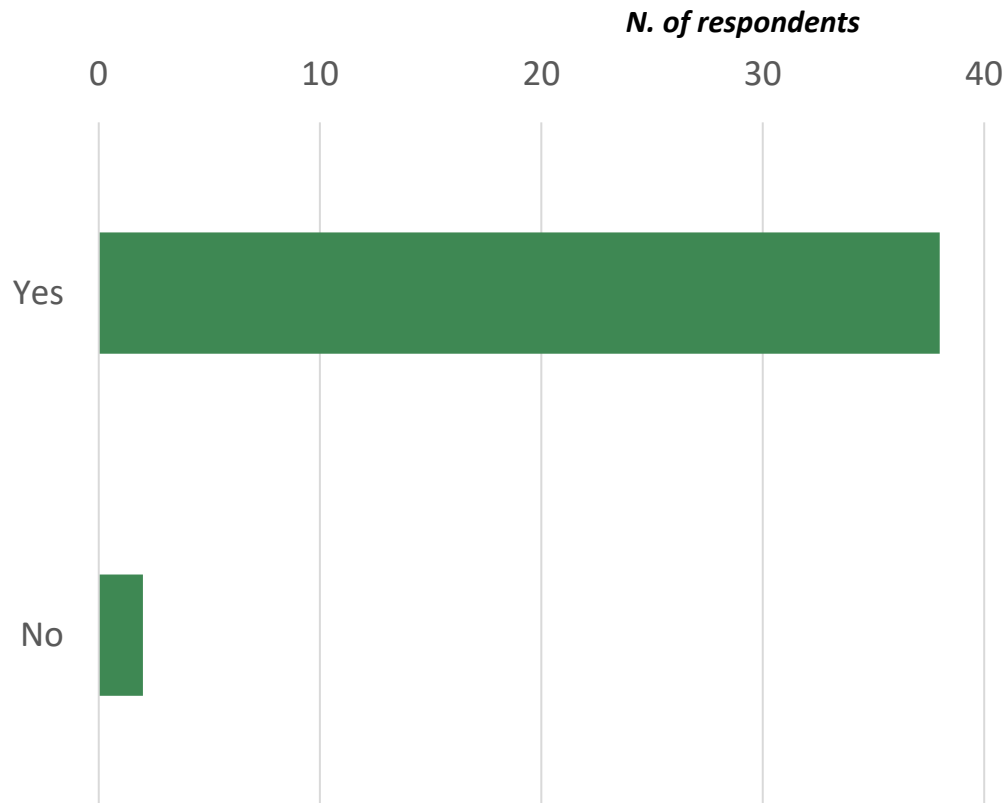
A good initiative. A complex work but my impression is that there is a good progress forward

Market trends

11RFCS JOINT TMS SURVEY - 2023

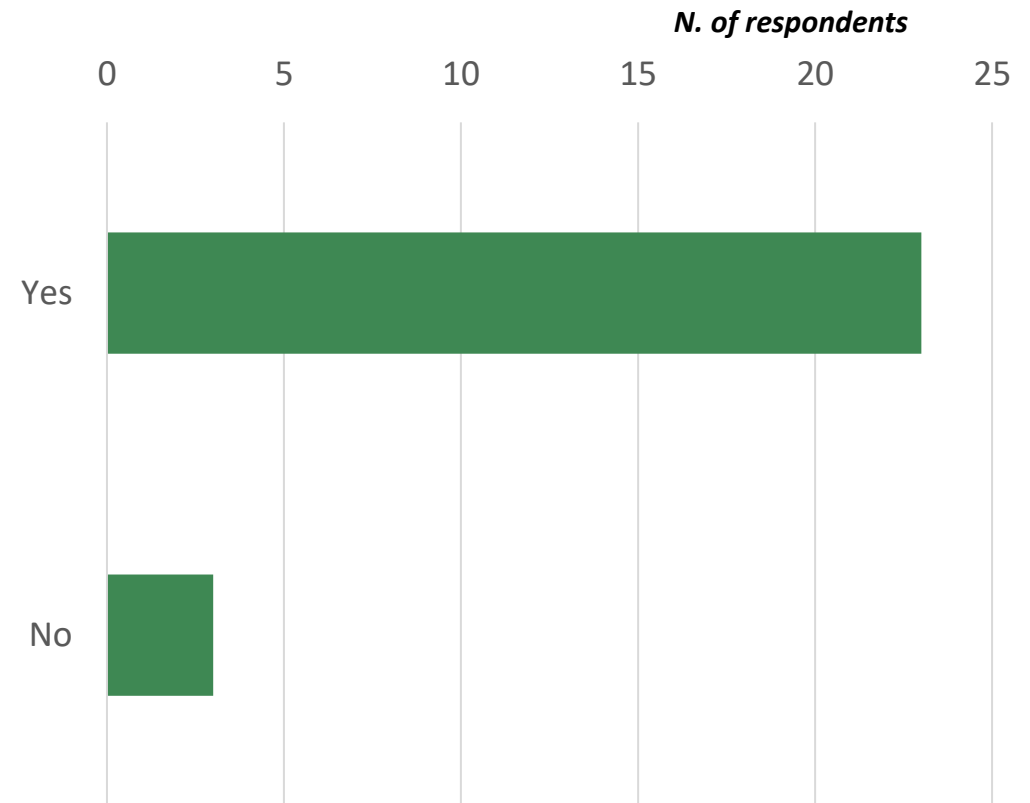
Respondent has operated/operates rail services or manages/operates terminals serving trains across at least one border crossing point(s) in any RFCs

RAILWAY UNDERTAKINGS*



*40 out of 42 respondents

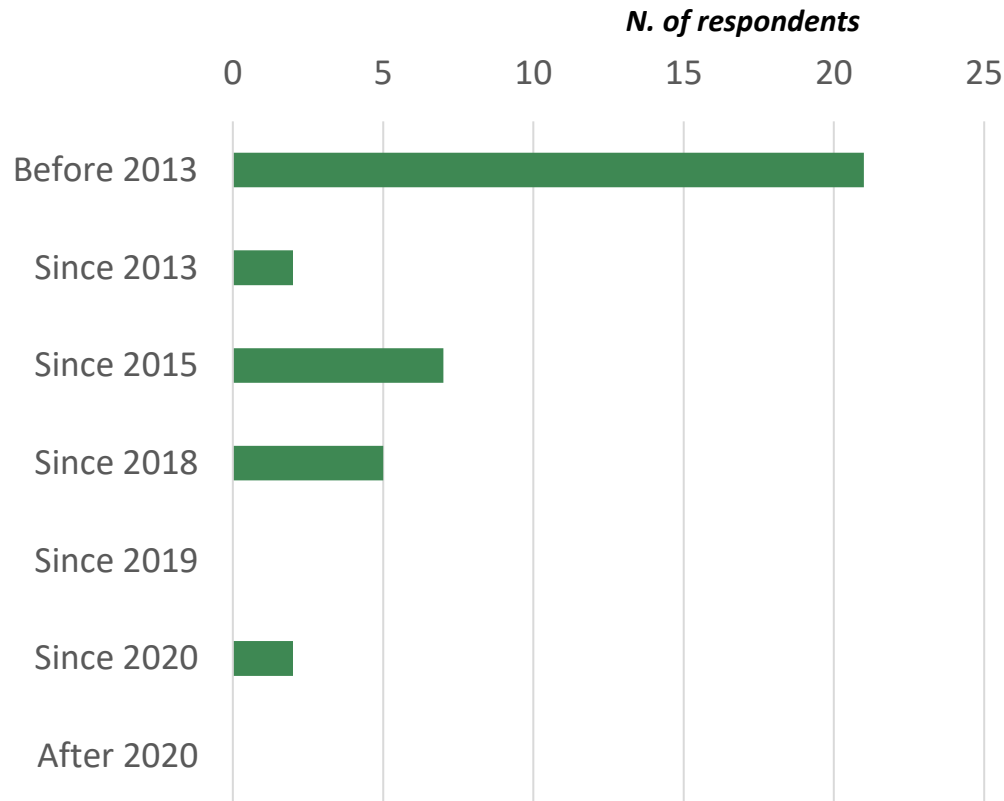
TERMINALS**



**26 out of 30 respondents

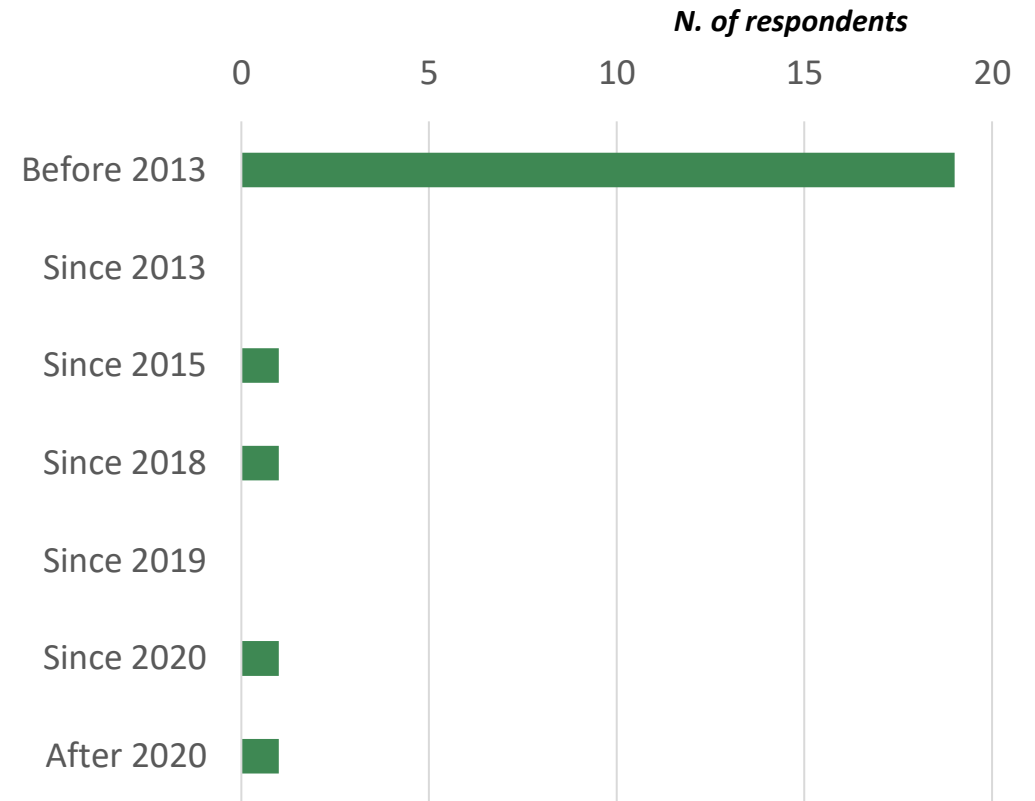
Respondent has operated/operates rail services or manages/operates terminals serving trains across at least one border crossing point(s) in any RFCs

RAILWAY UNDERTAKINGS*



*37 out of 42 respondents

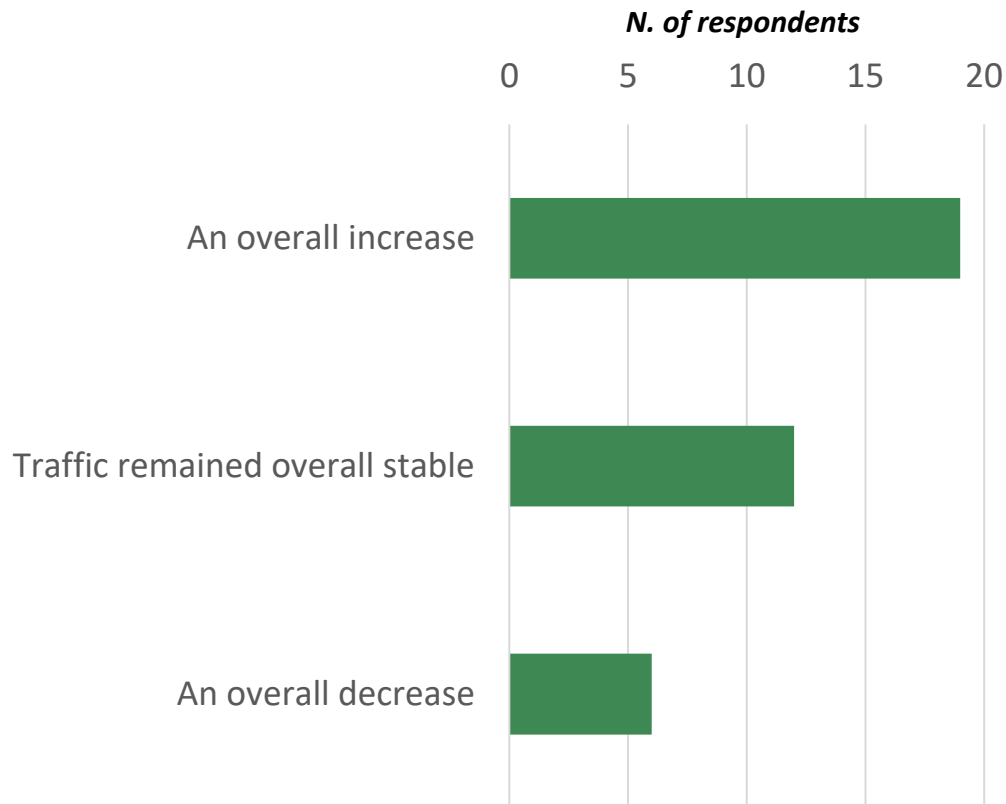
TERMINALS**



**23 out of 30 respondents

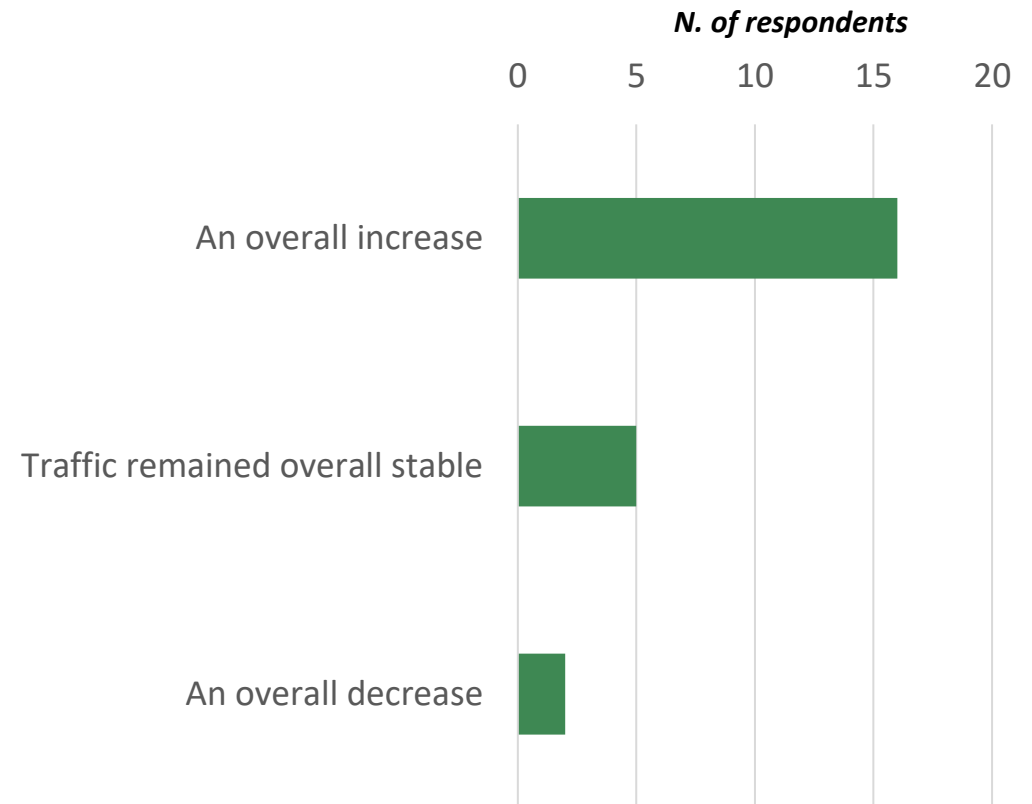
Variation in the operation of trains and in serving trains crossing at least one border crossing point(s) in any RFCs since 2013

RAILWAY UNDERTAKINGS*



**37 out of 42 respondents*

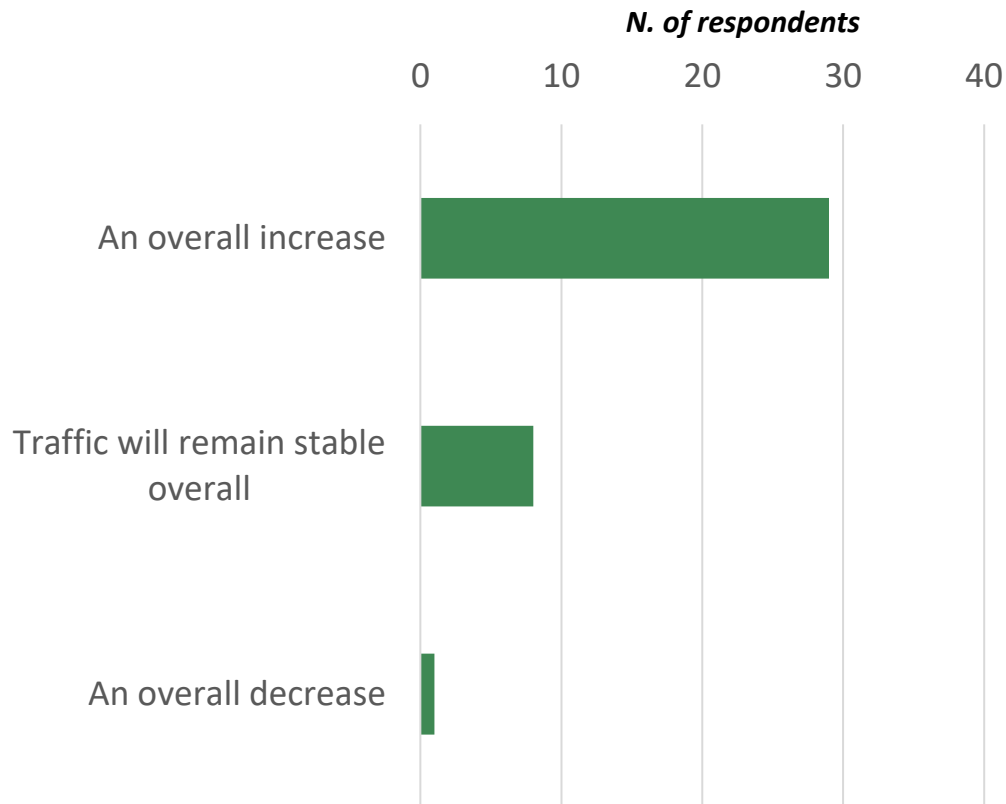
TERMINALS**



***23 out of 30 respondents*

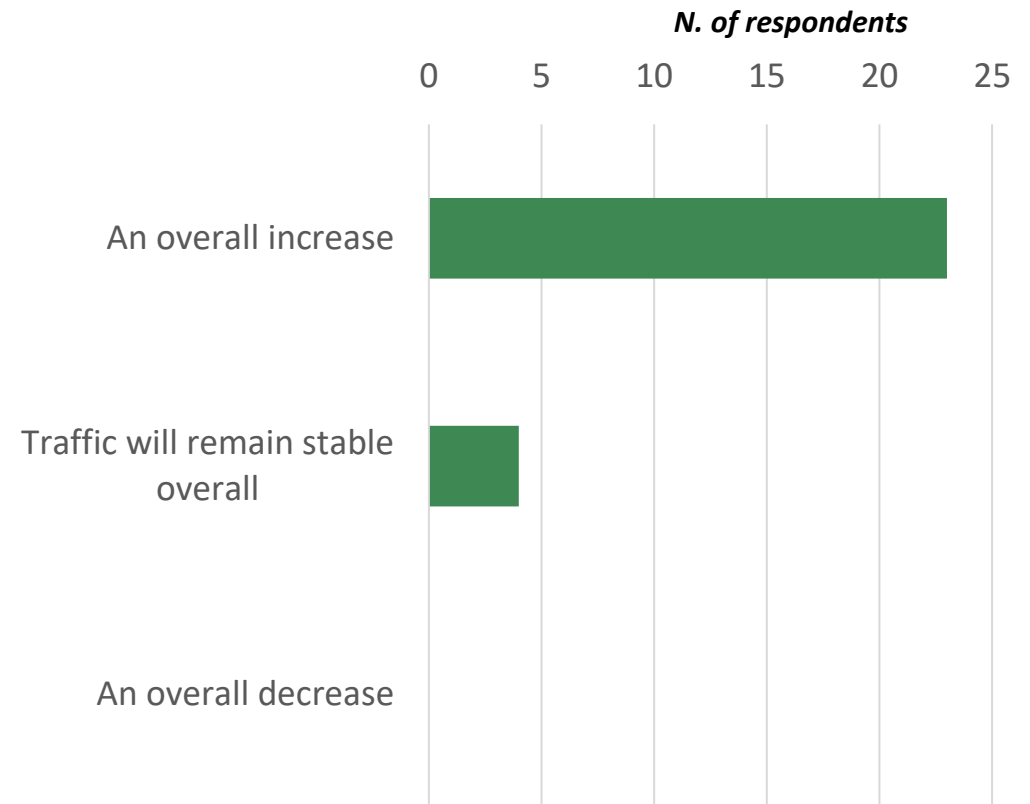
Variation in the operation of trains and in serving trains crossing at least one border crossing point(s) in any RFCs in the short term, until 2030

RAILWAY UNDERTAKINGS*



**38 out of 42 respondents*

TERMINALS**



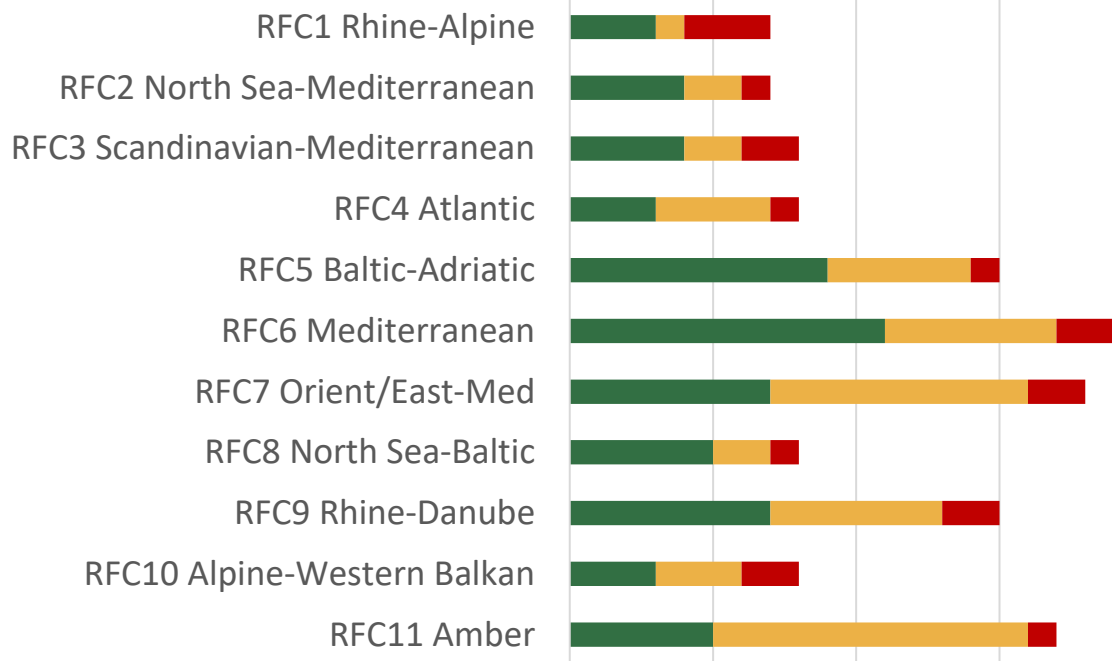
***27 out of 30 respondents*

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

0 5 10 15 20

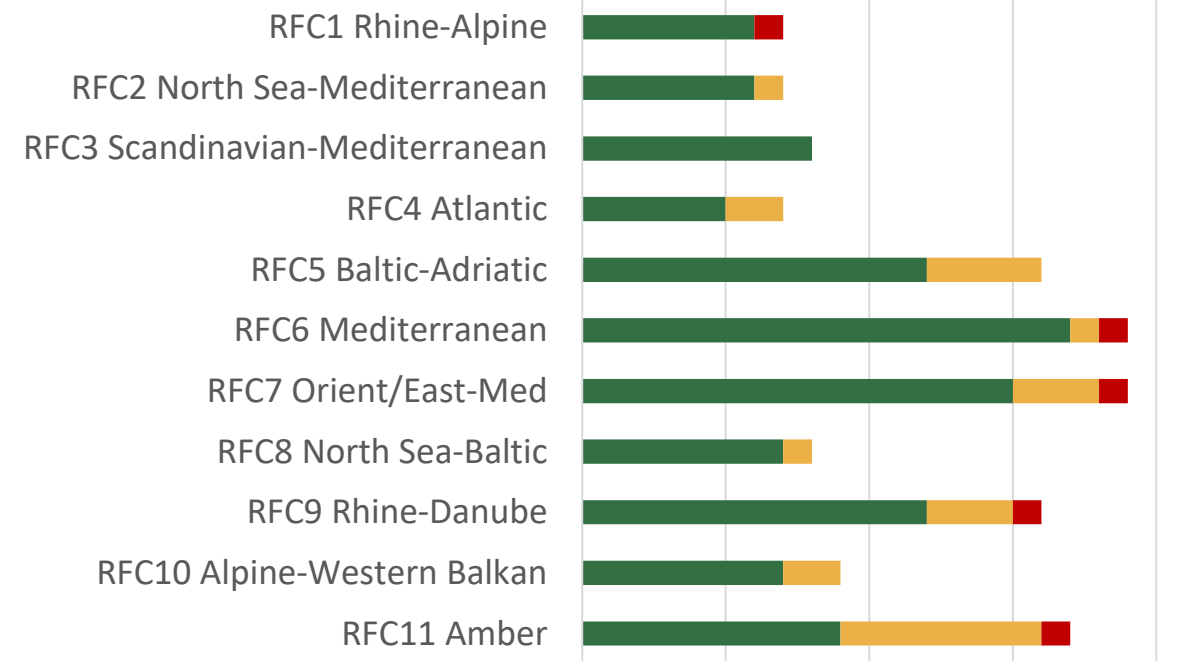


■ Existing/new operations growing
 ■ Existing/new operations stable
■ Existing/new operations declining

EXPECTED VARIATION UNTIL 2030

N. of respondents

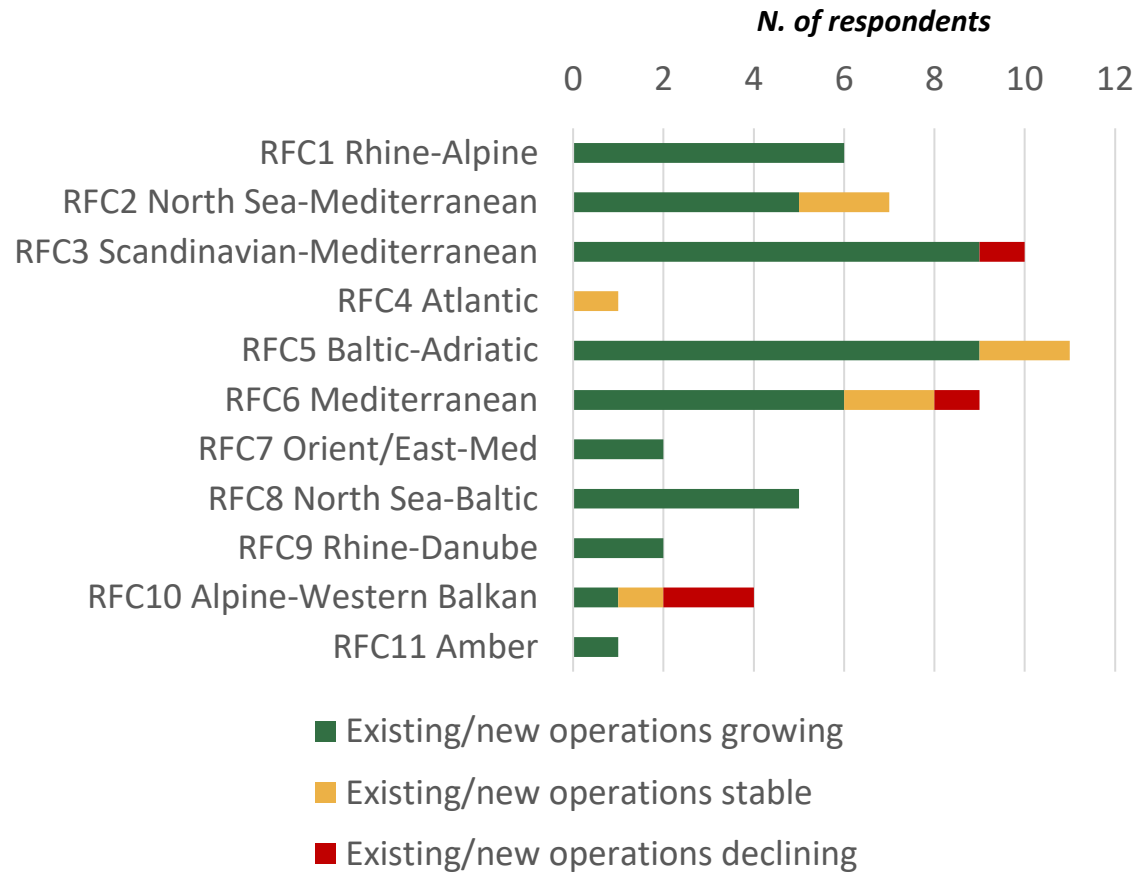
0 5 10 15 20



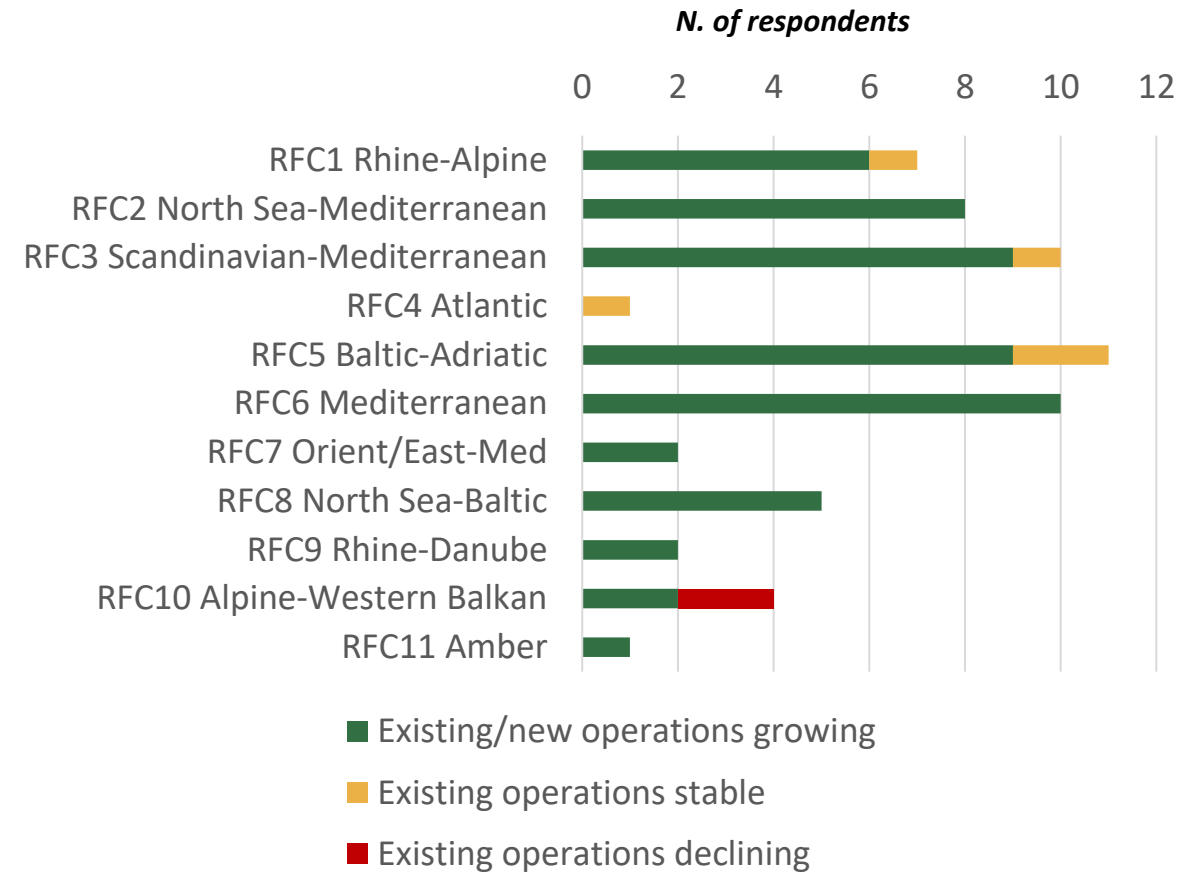
■ Existing/new operations growing
 ■ Existing operations stable
■ Existing operations declining

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

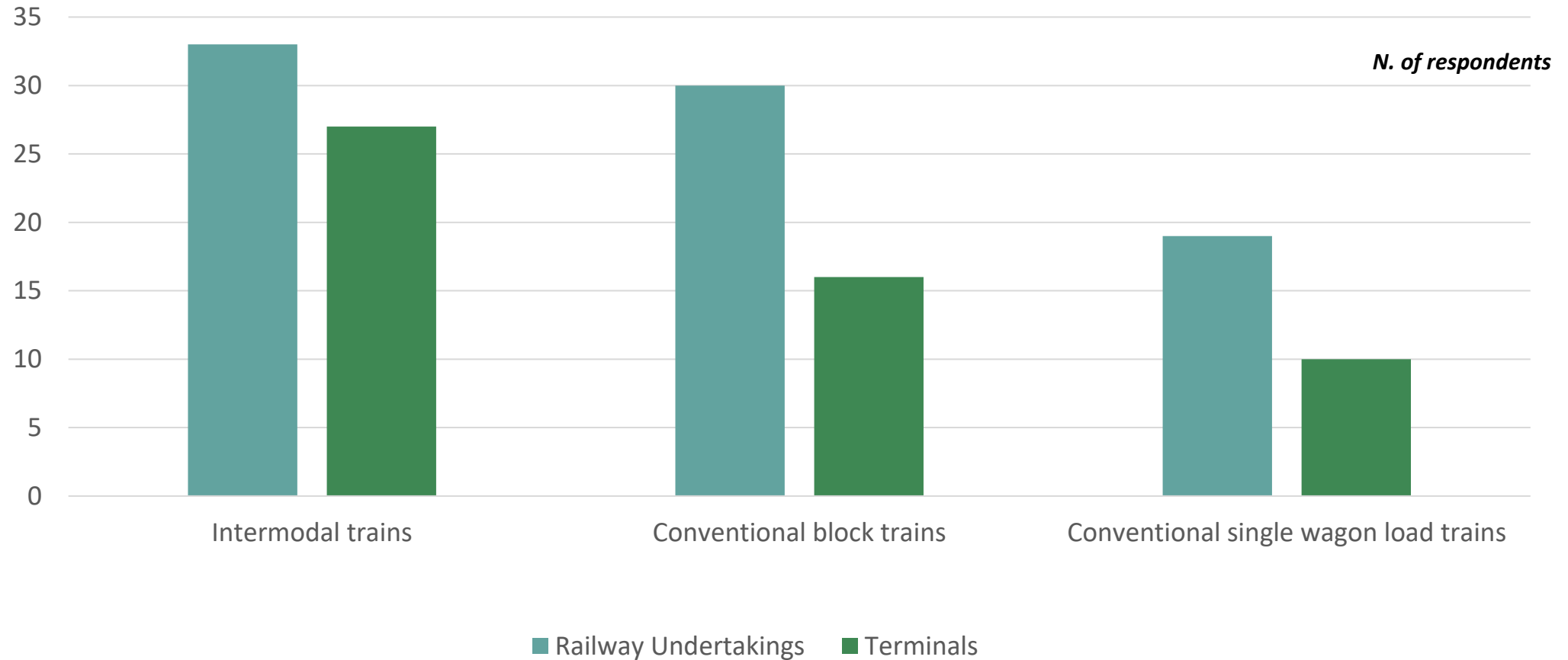
EXPERIENCED VARIATION SINCE 2013



EXPECTED VARIATION UNTIL 2030

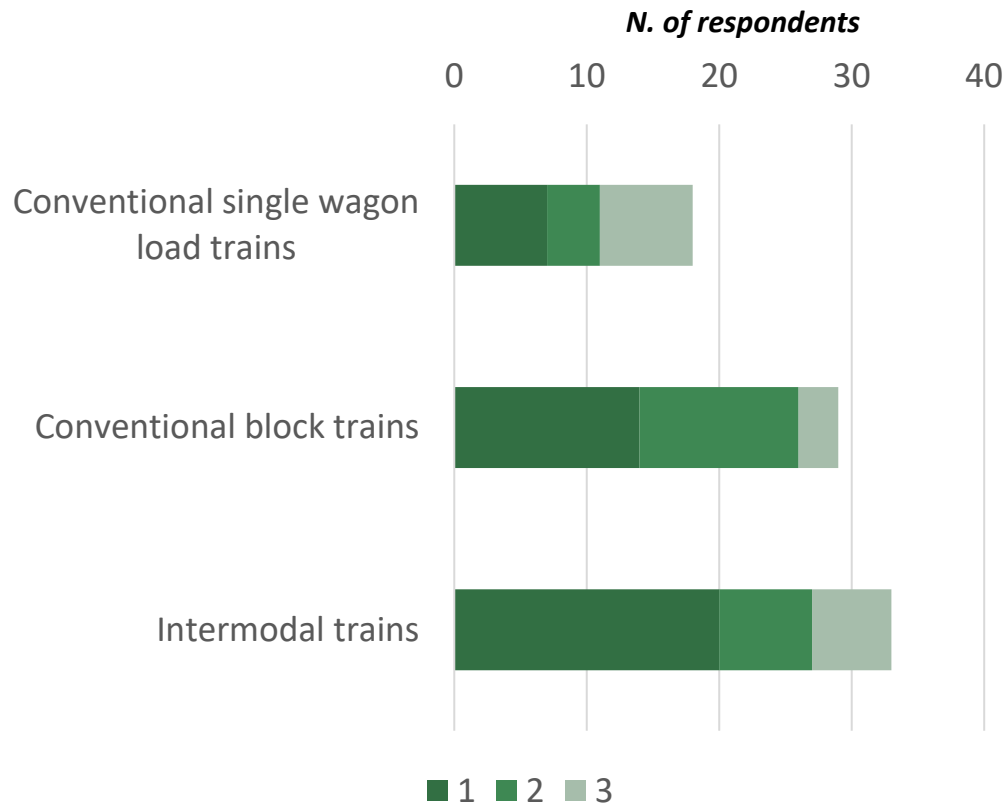


Type of trains operated by railway undertakings or served at terminals crossing at least one border crossing point(s) in any RFCs

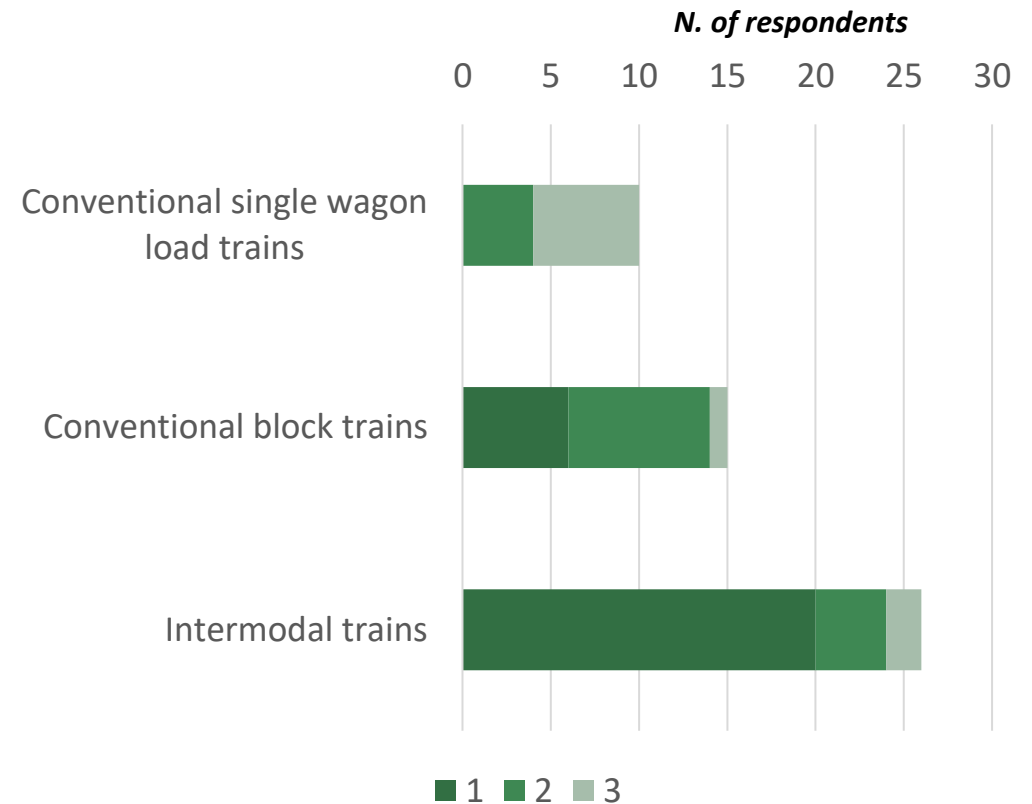


Ranking of type of trains operated by railway undertakings or served at terminals crossing at least one border crossing point(s) in any RFCs

RAILWAY UNDERTAKINGS

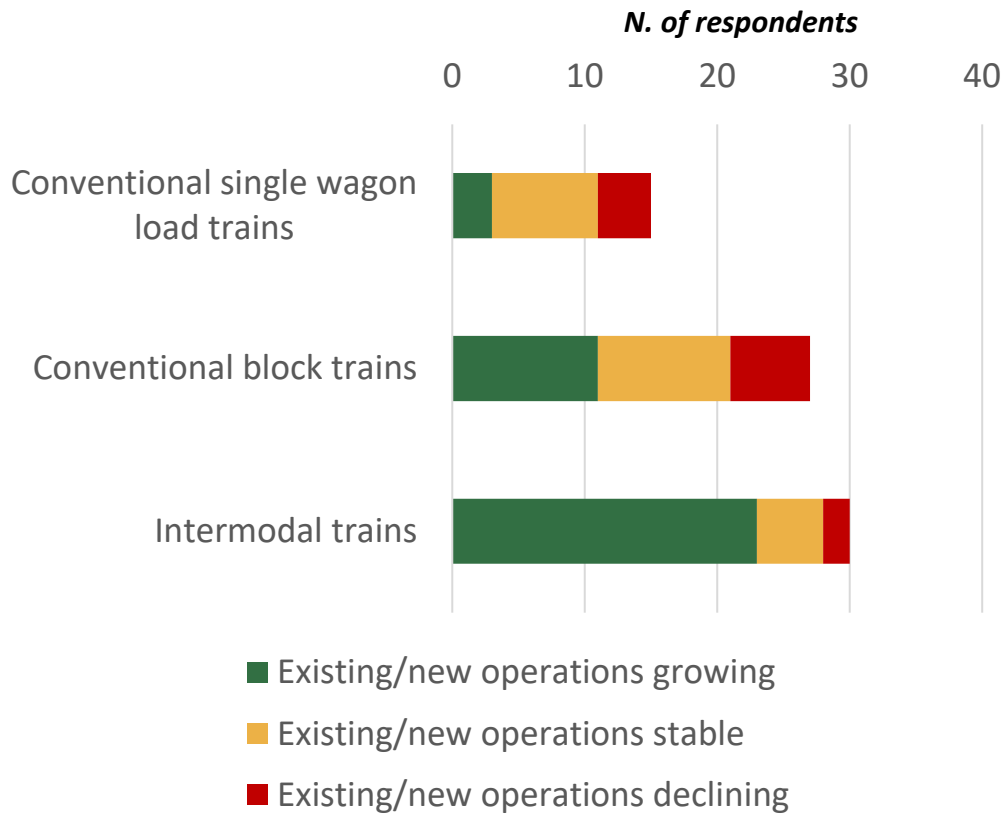


TERMINALS

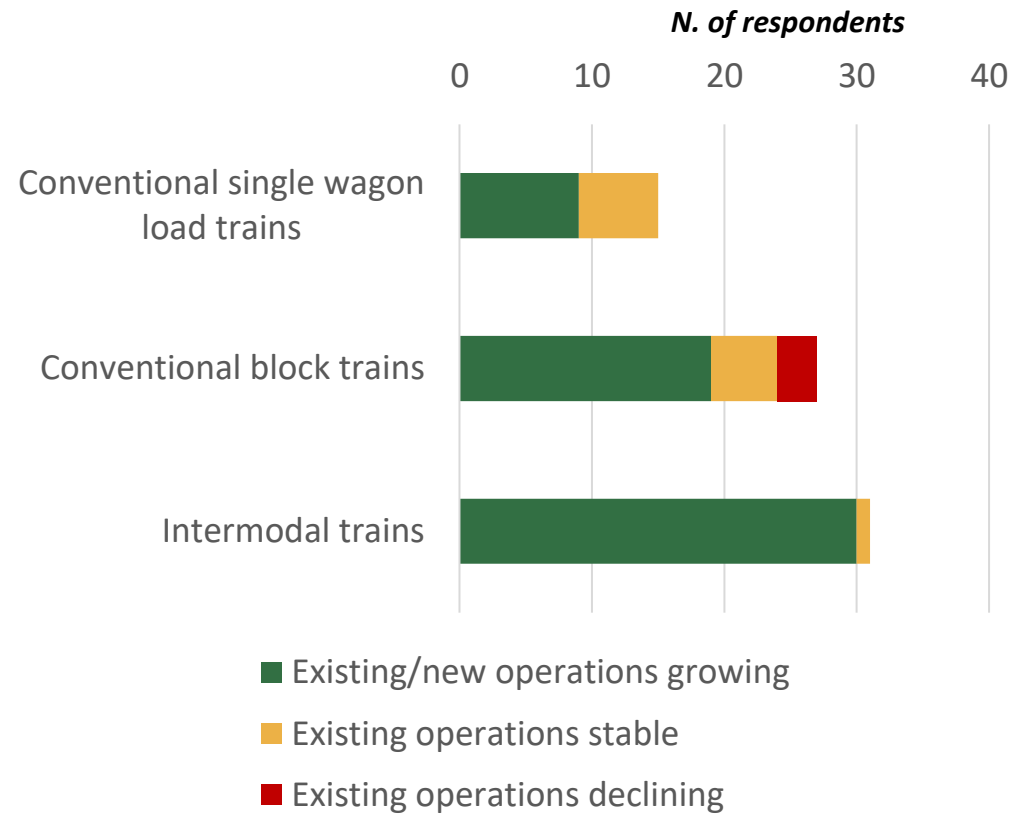


Experienced and expected traffic trend on the type of trains operated by RUs crossing at least one border crossing point(s) in any RFCs

EXPERIENCED VARIATION SINCE 2013

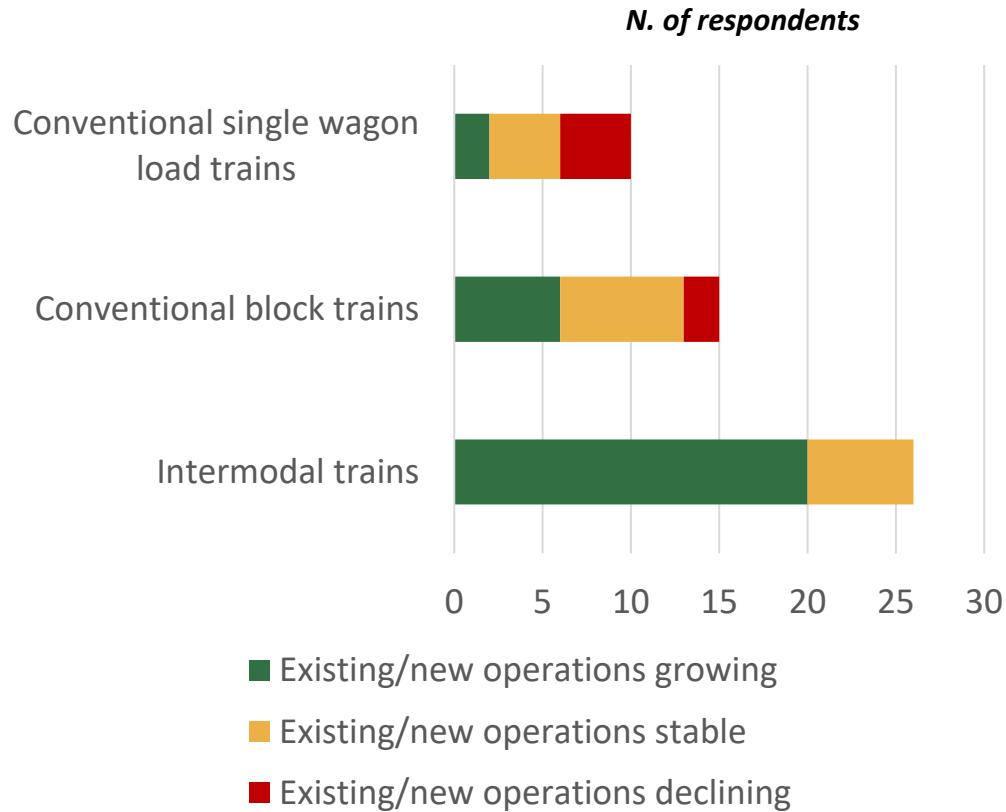


EXPECTED VARIATION UNTIL 2030

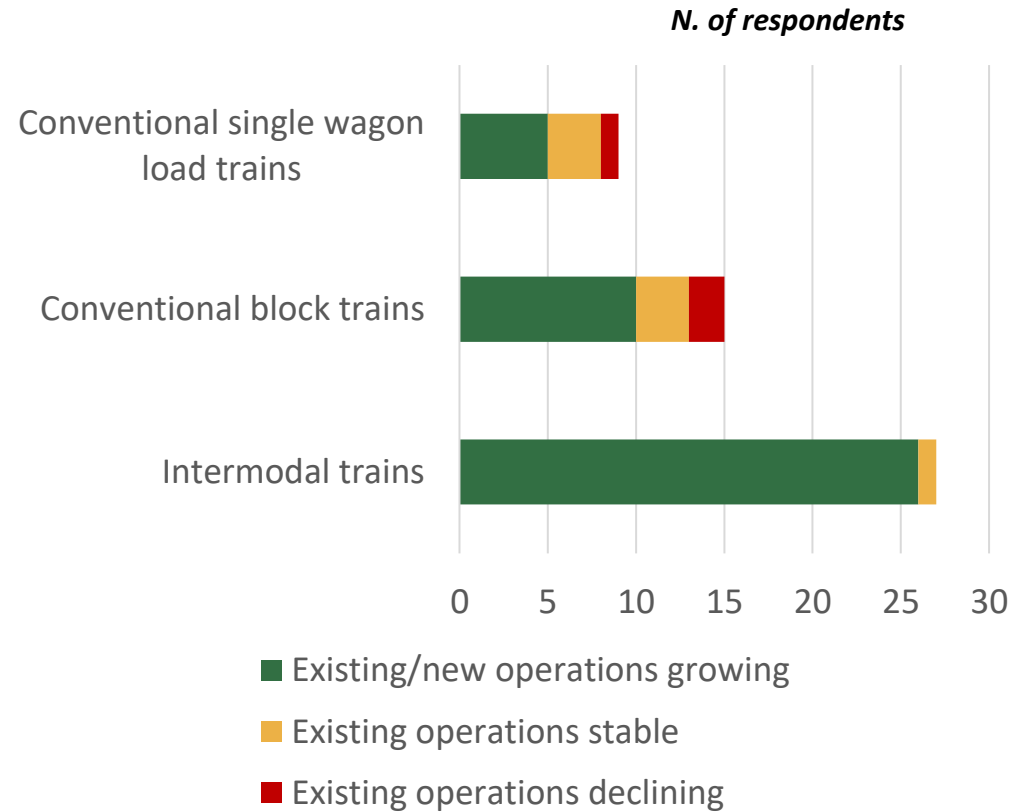


Experienced and expected traffic trend on the type of trains served at terminals crossing at least one border crossing point(s) in any RFCs

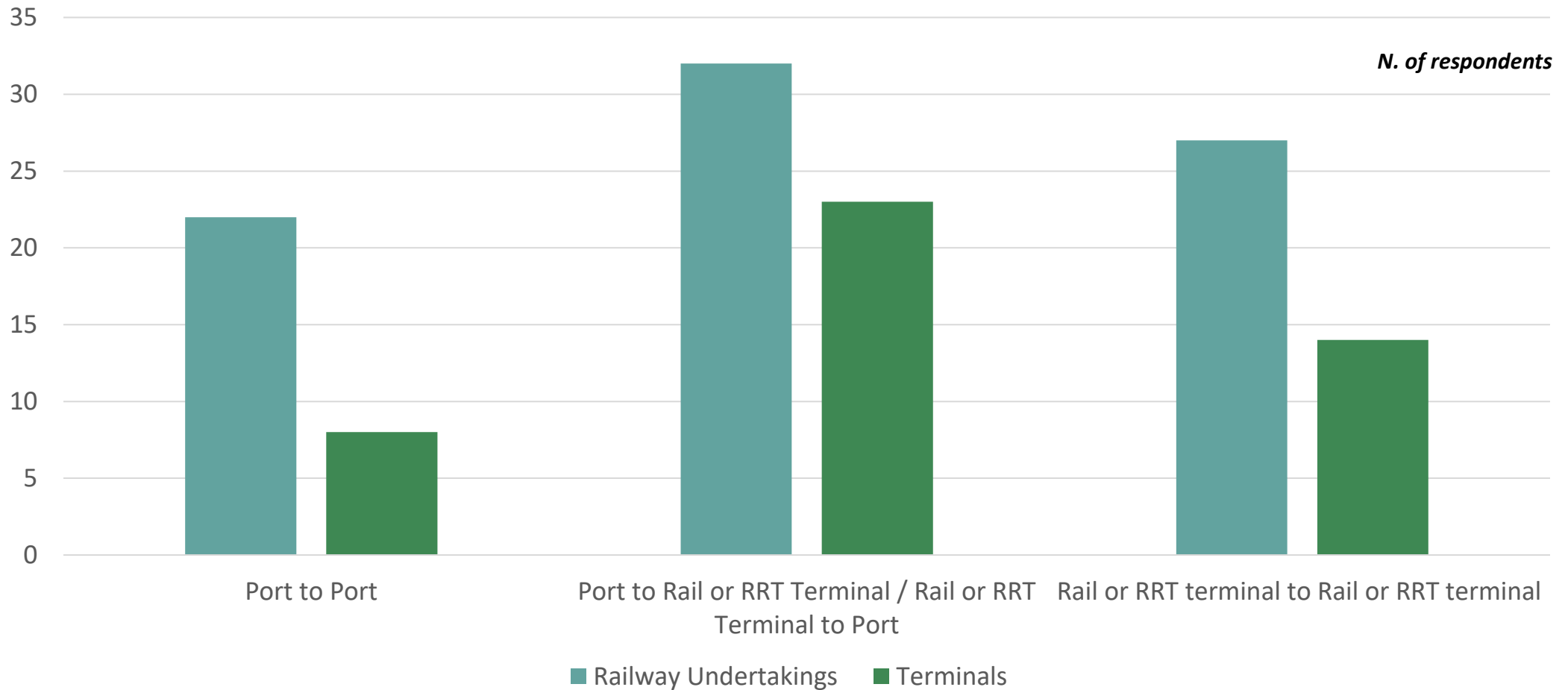
EXPERIENCED VARIATION SINCE 2013



EXPECTED VARIATION UNTIL 2030

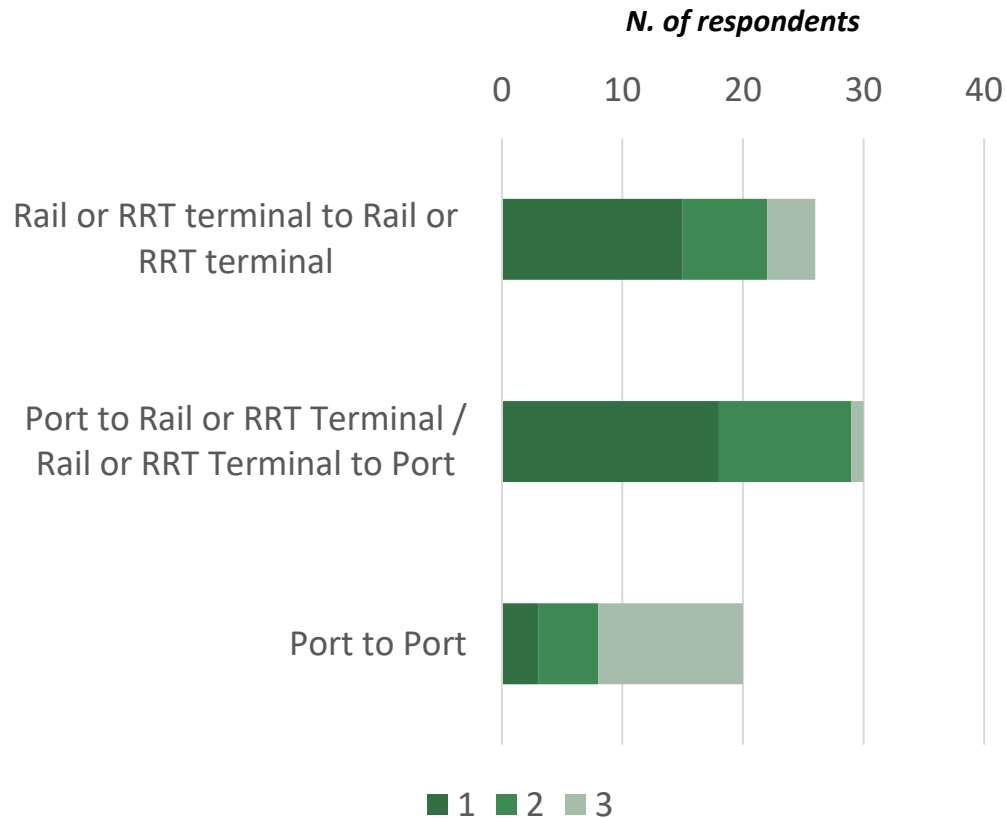


The type of O/Ds of the trains operated by railway undertakings or served at terminals crossing at least one border crossing point(s) in any RFCs

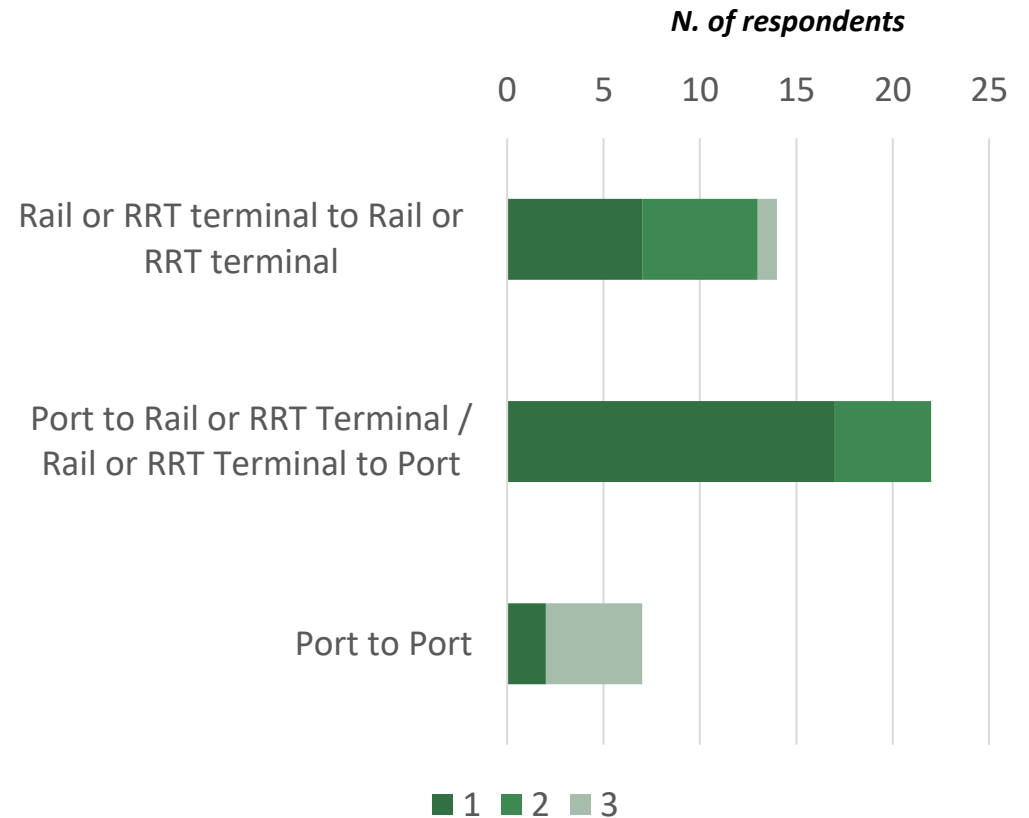


Ranking of the types of O/Ds of the trains operated by RUs or served at terminals crossing at least one border crossing point(s) in any RFCs

RAILWAY UNDERTAKINGS

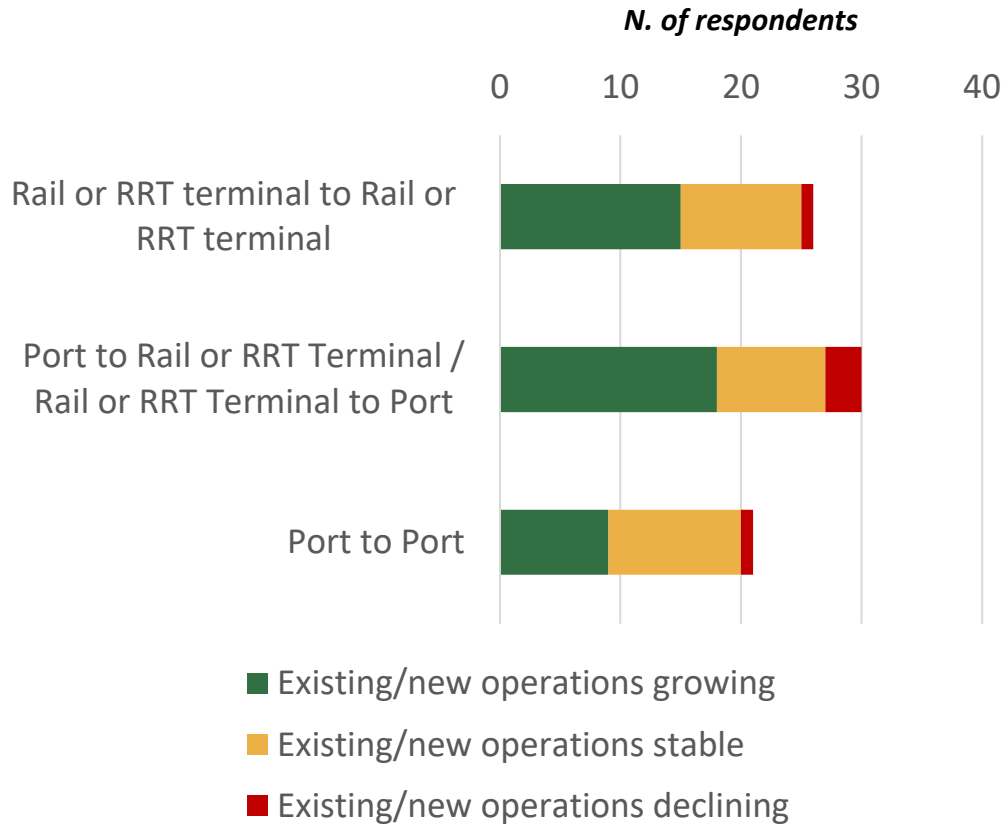


TERMINALS

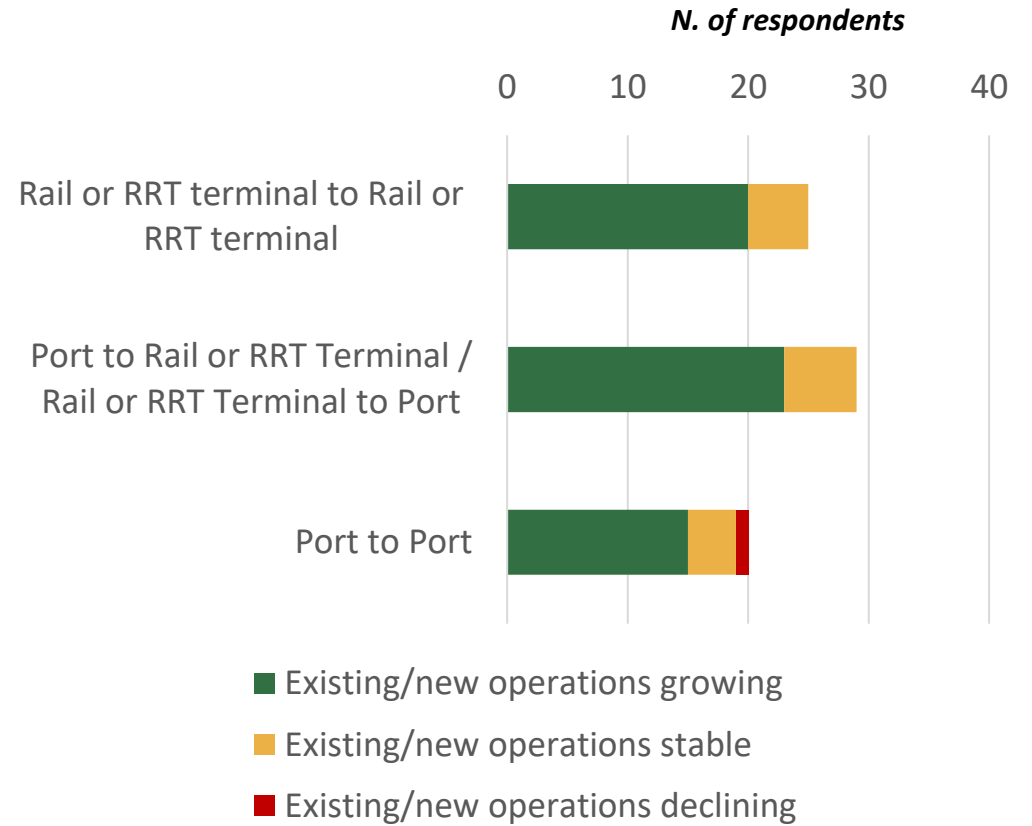


Experienced and expected traffic trend on the type of O/Ds of the trains operated by RUs crossing at least one border crossing point(s) in any RFCs

EXPERIENCED VARIATION SINCE 2013

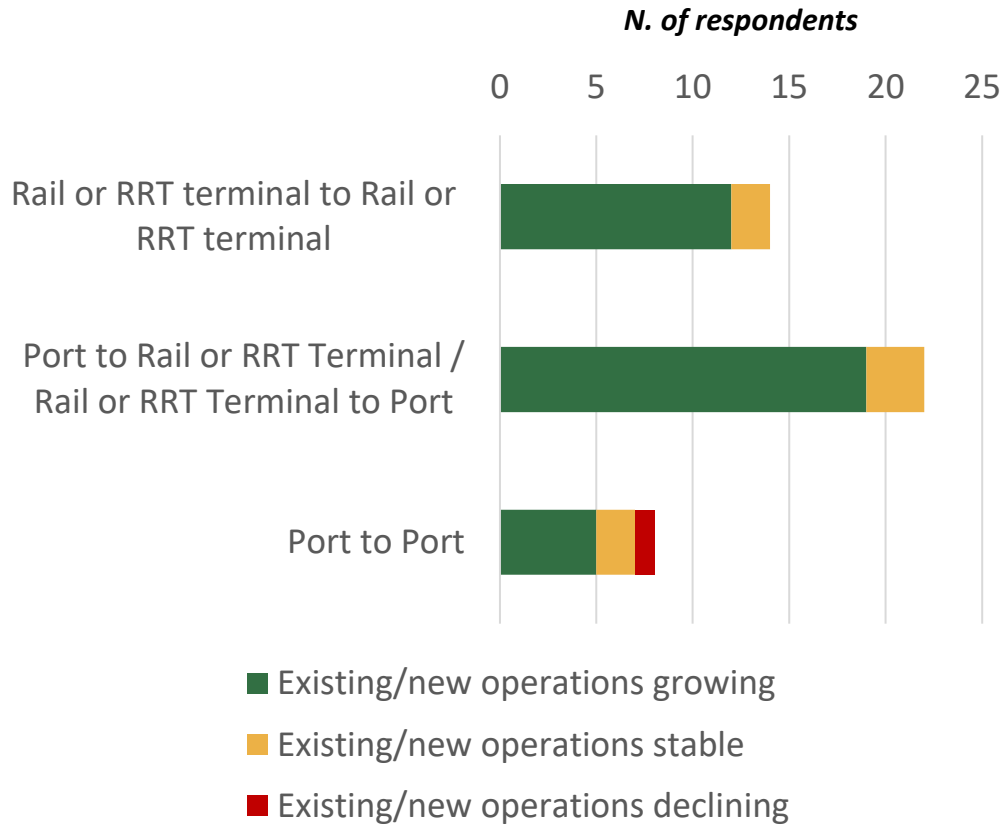


EXPECTED VARIATION UNTIL 2030

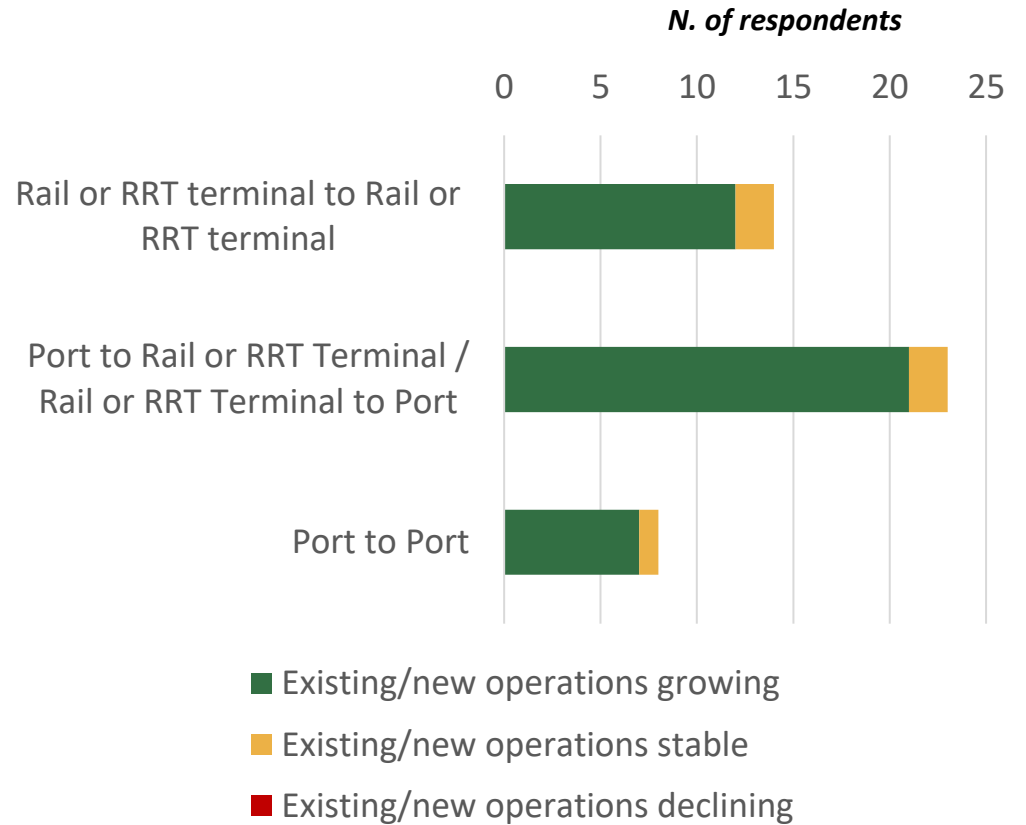


Experienced and expected traffic trend on the type of O/Ds of the trains served at terminals crossing at least one border crossing point(s) in any RFCs

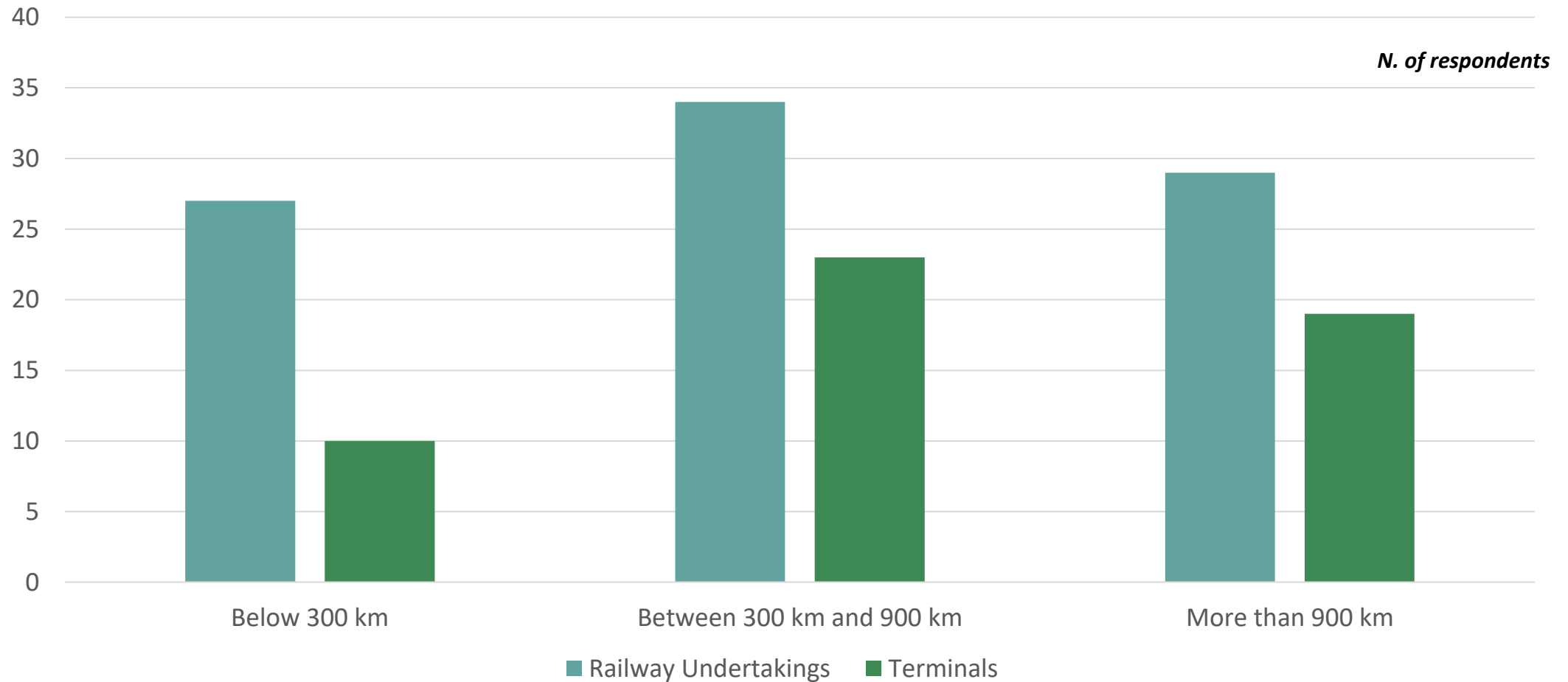
EXPERIENCED VARIATION SINCE 2013



EXPECTED VARIATION UNTIL 2030

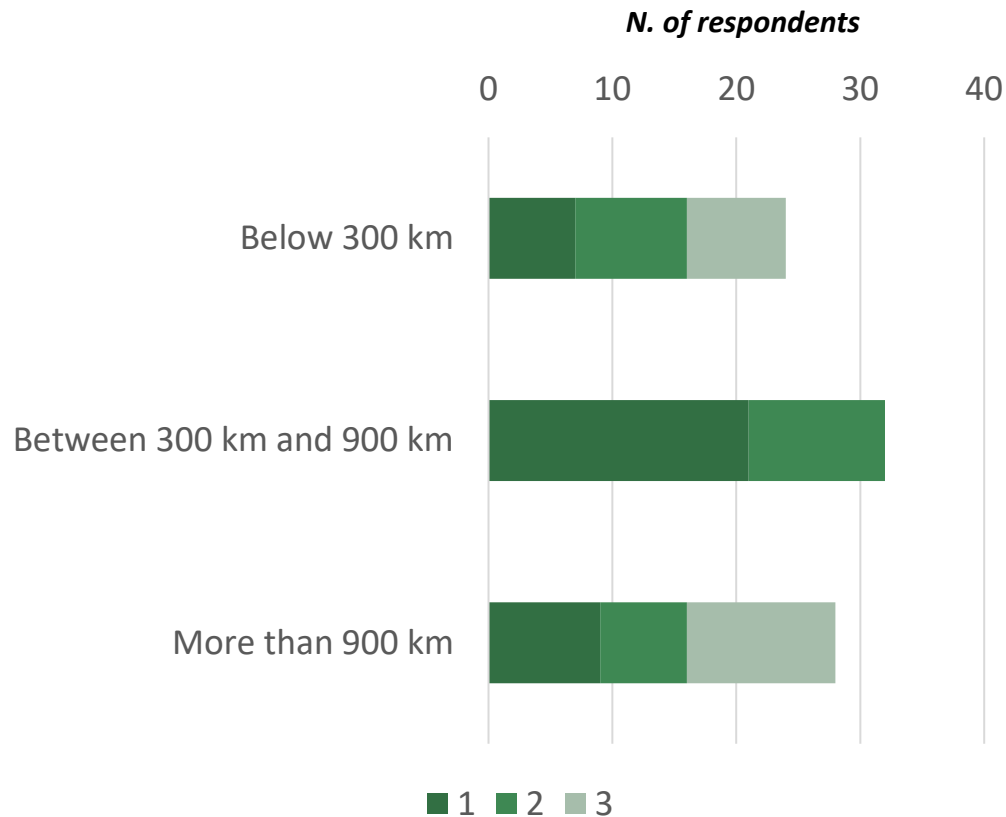


Type of distances of the trains operated by railway undertakings or served at terminals crossing at least one border crossing point(s) in any RFCs

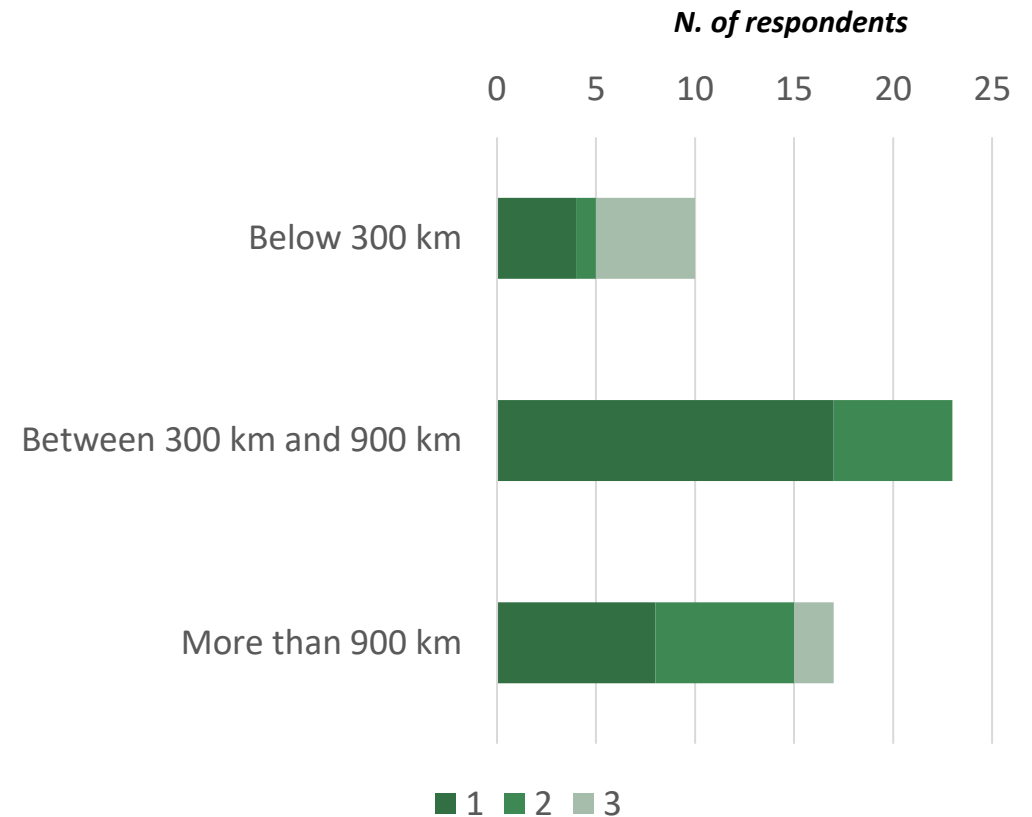


Ranking of types of distances of the trains operated by railway undertakings or served at terminals crossing at least one border crossing point(s) in any RFCs

RAILWAY UNDERTAKINGS

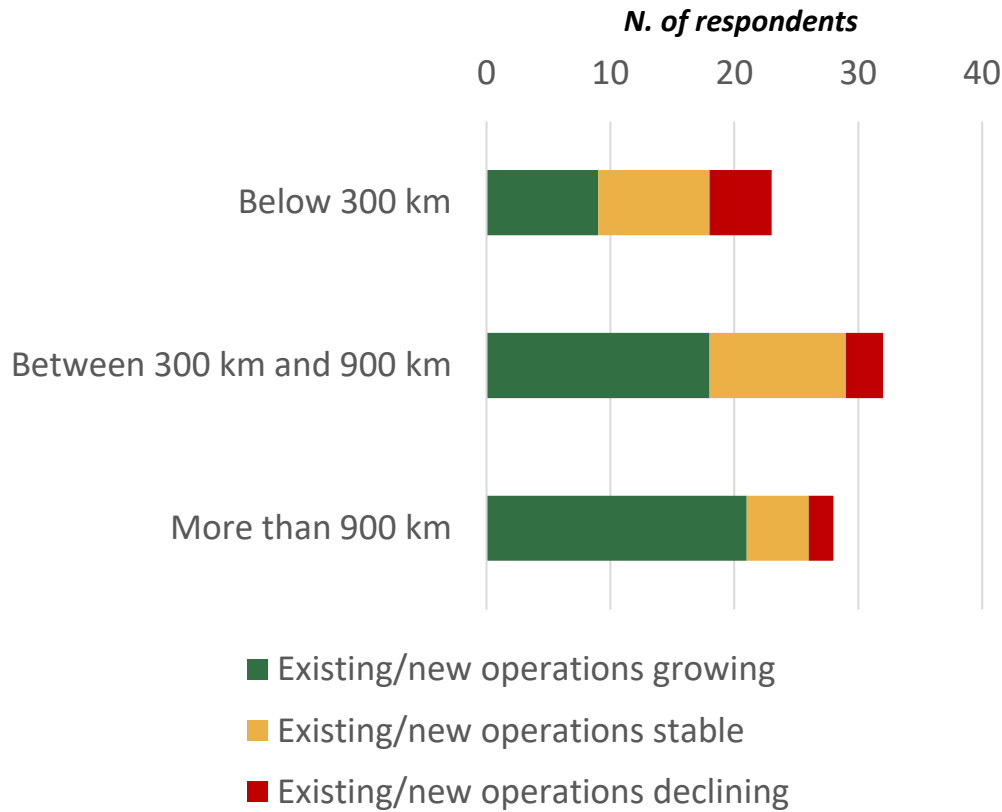


TERMINAL

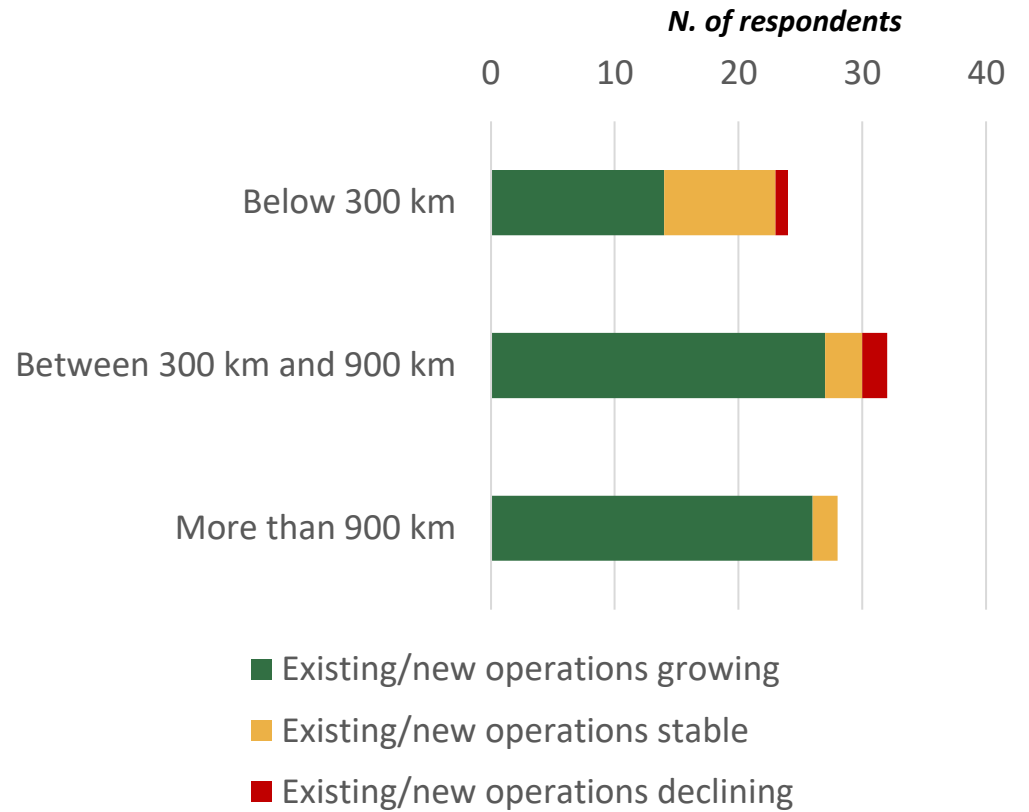


Experienced and expected traffic trend on type of distances of the trains operated by RUs crossing at least one border crossing point(s) in any RFCs

EXPERIENCED VARIATION SINCE 2013

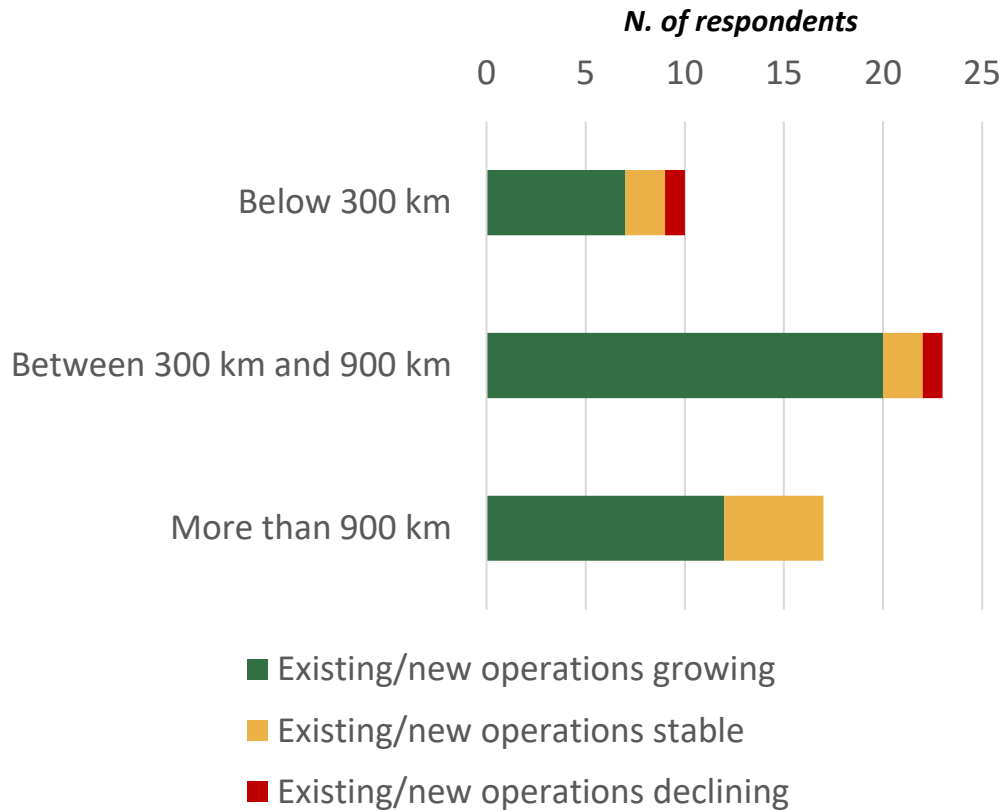


EXPECTED VARIATION UNTIL 2030

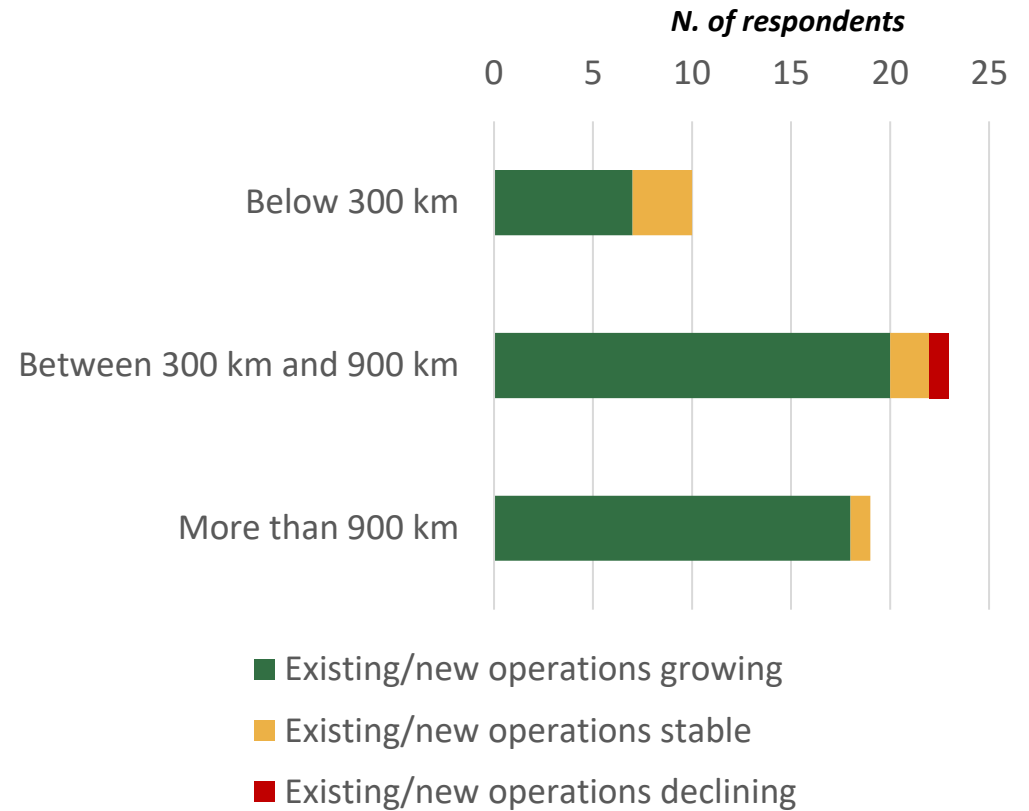


Experienced and expected traffic trend on type of distances of the trains or served at terminals crossing at least one border crossing point(s) in any RFCs

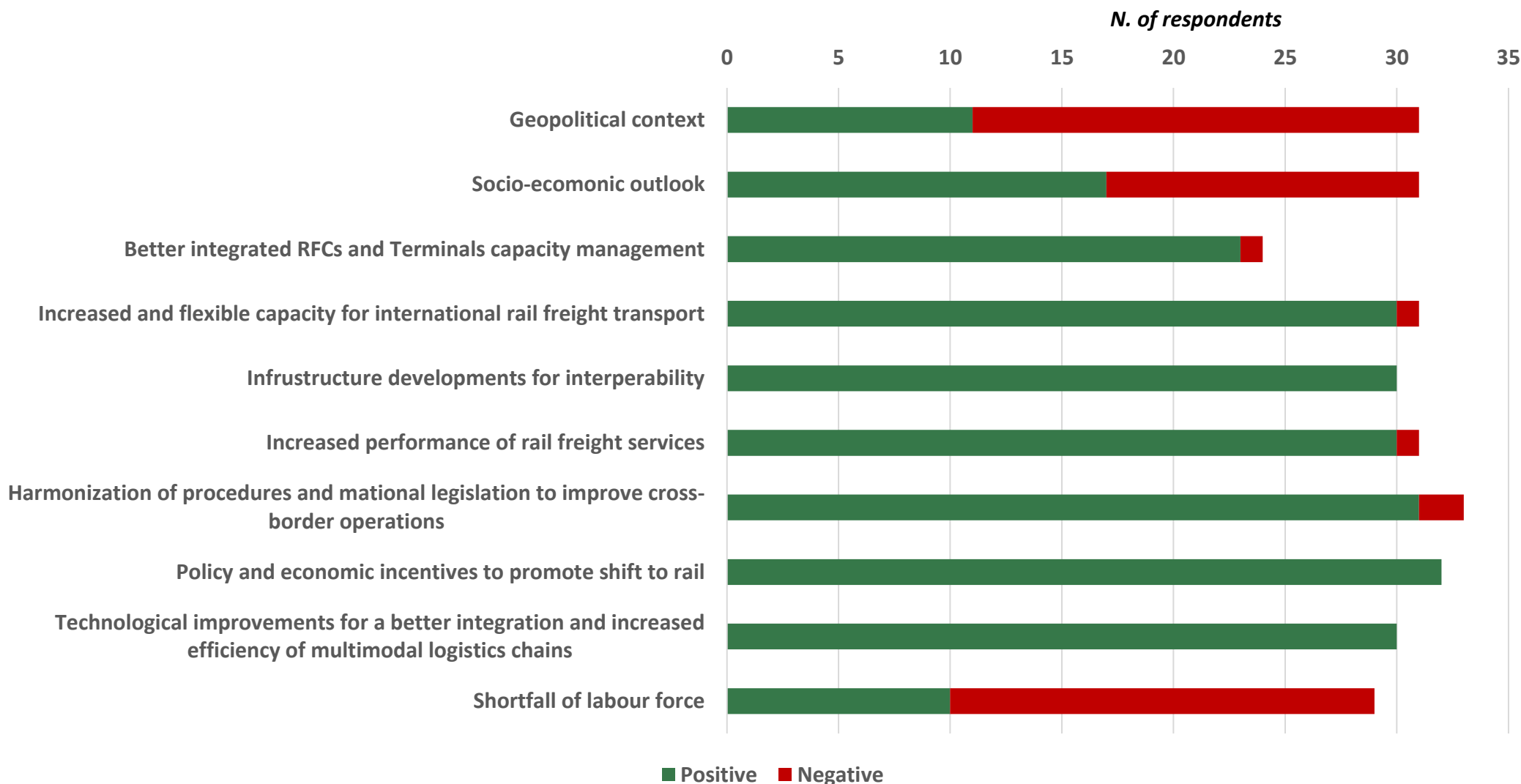
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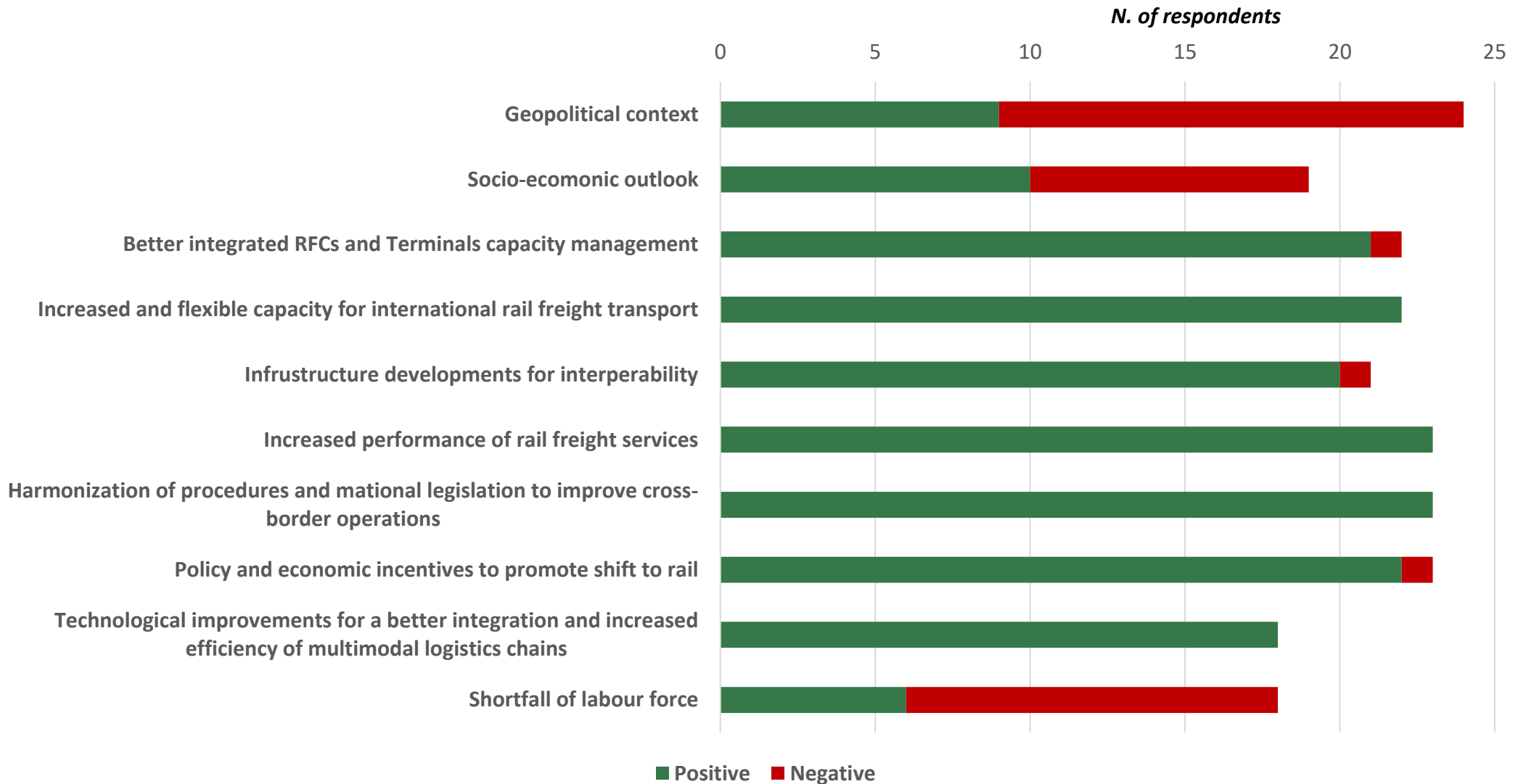
EXPECTED VARIATION UNTIL 2030



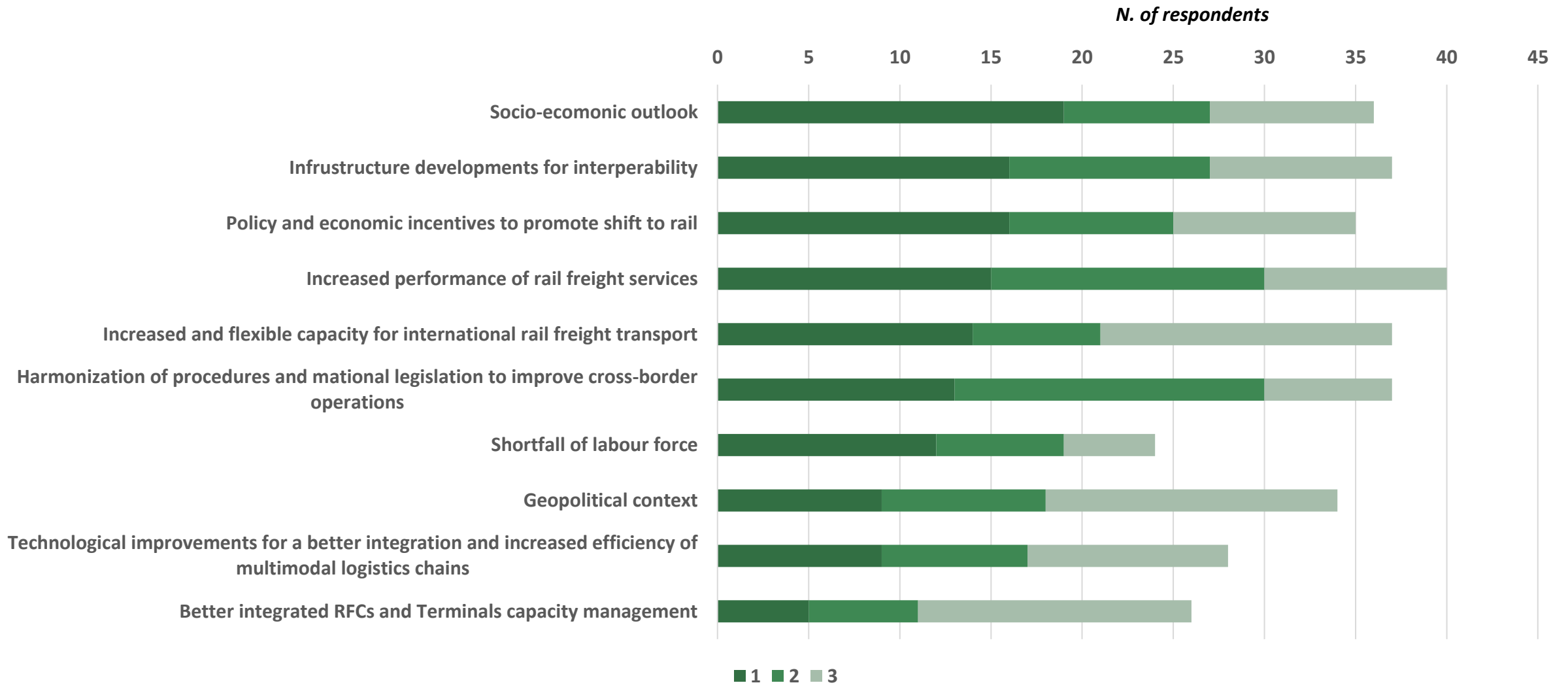
Potential effect of the following market drivers and rank their relevance for the evolution of international rail freight transport in the short term operated by RUs, until 2030



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



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



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-Strasbourg-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)



2023-2024 Joint TMS update of the 11 RFCs belonging to the European Rail Network for Competitive Freight