

# Baltic – Adriatic Rail Freight Corridor

**Implementation Plan**  
**July 2025**

Change history

VERSION	AUTHOR	DATE	CHANGES
1.0	EM	16.10.2024	First content scheme
1.1	Kick off meeting	18.11.2024	Comments
1.2	EM	20/3/2025	Updates to ch. 1, 2.4, 3, 4, 5
1.3	CIM	28/3/2025	Updates Index, new structure of ch.6
1.4	EM	15/04/2025	Updated OPE bottlenecks and contents of ch.5 and 6.1
1.5	CIM	30/04/20125	Updated ch 2.1, 2.2,2.3
1.6	EM	08/05/2025	Updated chapter 3
1.7	EM	15/05/2025	Clean version accepting remarks made previously. Added new remarks
1.8	CIM	26/05/2025	Add map of the corridor description, updated corridor routing ch. 2, updated table bottlenecks
1.9	EM	3/6/2025	Updated ch. 2.4; 3; 6
2.0	EM	30/06/2025	Approved by MaBo
2.1	ExBo	16/07/2025	Approved by ExBo
2.2	RAG	17/07/2025	Updated ch 6.3. Approved by RAG&TAG

## Content

1	Introduction .....	4
2	Corridor Description .....	8
2.1	Key Parameters of Corridor Lines .....	9
2.2	Corridor Terminals .....	10
2.3	Bottlenecks.....	10
2.3.1	Infrastructure bottlenecks.....	12
2.3.2	Operational bottlenecks.....	18
2.4	RFC Governance .....	19
3	Transport Market Study .....	19
4	List of Measures.....	27
4.1	Coordination of planned temporary capacity restrictions.....	27
4.2	Corridor OSS.....	27
4.3	Capacity Allocation Principles .....	28
4.4	Applicants.....	28
4.5	Traffic Management.....	28
4.6	Traffic Management in the Event of Disturbance.....	28
4.7	Corridor Information Document.....	28
4.8	Quality Evaluation .....	28
4.8.1	Performance Monitoring Report.....	28
5	Objectives and performance of the corridor.....	29
6	Cooperation and consultation in the frame of the Implementation Plan.....	32
6.1	Procedure of the cooperation with the advisory group .....	32
6.2	Views and assessment of advisory groups regarding corridor development.....	33
6.3	Results of the consultation of the draft Implementation Plan .....	33

## 1 Introduction

The Rail Freight Corridor Baltic-Adriatic (onwards “Baltic-Adriatic RFC”) was established in 2015 as implementation of the Regulation (EU) No 913/2010 on a competitive network for rail freight (onwards “EU Freight Regulation”). The aim of the EU Freight Regulation is to enhance the competitiveness of the rail freight transport in order to improve the market share of rail over road.

The Annex to the EU Freight Regulation provided for the implementation of nine initial Rail Freight Corridors, to be established in two waves: in 2013 and in 2015, the Baltic-Adriatic RFC belonging to this second wave. The EU Freight Regulation lays down rules for the establishment and organization of international rail corridors for competitive rail freight, the so-called “Rail Freight Corridors” (RFCs). These rules encompass the selection, organization, management and the indicative investment planning of freight corridors.

As of July 18<sup>th</sup> 2024, the Regulation (EU) No 1679/2024 entered into force amending the Regulation (EU) No 913/2010.

It provided for the implementation of nine European Transport Corridors (ETCs), which are multimodal and supervised by a European Coordinator.

The Baltic-Adriatic RFC consists of the freight railways lines of the ETC Baltic Sea-Adriatic Sea.

Before the Regulation 1679/2024 entered into force, the Baltic Adriatic RFC had run through six States of European Union, namely Poland, Czech Republic, Slovakia, Austria, Slovenia and Italy and its funding members are the respective railway infrastructure managers. The new routing extends the alignment of the BA RFC to new lines in the funding members and to another two Member States of the EU, namely Croatia and Hungary.

The Regulation provides a period of 18 months from the date it entered into force in order for the governance of the Baltic-Adriatic RFC to adapt to the new routing, therefore extending to the two new Member States and respective infrastructure managers and Allocation Body into the existing governance.

In the spirit of the EU Regulation, the RFCs represent a cooperation platform for the EU Coordinator, Governments, Infrastructure Managers/Allocation Bodies Railway Undertakings and Terminals, aimed at boosting European rail transport.

Baltic-Adriatic RFC governance can support the respective EU Coordinator in improving the railway operational playing field along the ETC BSAS, as it has developed in the last years four main areas of competence:

- Market intelligence, in particular the carrying out of studies aimed at a better knowledge of the market and the listening of AGs needs.
- Capacity Management, construction and offer of well harmonized international rail freight capacity. In addition, the Baltic-Adriatic RFC contributes to the foster information and coordination of temporary capacity restrictions due to infrastructure works.
- Traffic and Performance Management, Baltic-Adriatic RFC monitors the performance of the freight trains crossing the corridor, with the aim of improving it and to identify potential barriers operational bottlenecks to be solved, in order to allow a smoother operation of trains across borders. In addition, the Baltic-Adriatic RFC facilitates the international coordination in the International Contingency cases declared along the RFC.
- KPIs management

On the occasion of the establishment of the Baltic-Adriatic RFC, an Implementation Plan was drawn up. It is the document presenting the means, the strategy and the measures that the parties concerned intend to implement which are necessary and sufficient to organize and manage the freight corridor.

The first draft provided:

- a detailed description of the corridor, in terms of infrastructure and market characteristics
- the measures that were already taken or were going to be taken, to set up the corridor structures and start the activities envisaged in the EU Freight Regulation (Sections 5 and 6)

Since then, the Baltic-Adriatic RFC has started and consolidated its structure and operational tasks.

In 2021, Baltic-Adriatic RFC issued a new version of the Implementation plan.

The main features of the 2021 editions were:

- Updated corridor description and information on bottlenecks ( Chapter 2)
- Main outcomes of the updated Transport Market Study (Chapter 3)
- Updated data on infrastructure and ERTMS investment ( Chapter 6)

Based on the new common structure for the RFC Corridor Information Document (CID), the information regarding the operational measures to set up the RFC is featured in the other CID Sections and it is updated every year. In order to give a comprehensive information, links to these CID Sections are provided in this document (Sections 4 and 5).

The downloadable version of the document is available here: [Customer Information Platform](#)

In 2023, based on the deliverables foreseen by the CEF TA grant agreement signed by the RFC with CINEA, the RFC has decided to issue another update of the Implementation Plan. The main novelties featured in the new version are:

1. Chapter 5: a list of corridor objectives complemented by (i) indicators operationalizing the objectives based on an objectively defined methodology and (ii) target values for the indicators and verbal description of the target situation for objectives that cannot be quantified. In parallel, a monitoring system has been set up and implemented to assess the current situation and monitor progress with respect to the objectives and targets.
2. Chapter 2.3: update of the information regarding the bottlenecks along the corridor, including in particular infrastructure declared congested in accordance with Art 47 of Directive 2012/34/EU, and their impact on cross-border freight traffic along the corridor.
3. Chapter 3: update of the information about the Capacity Study and the next TMS update

In 2025 it has been necessary to provide another update of the Implementation Plan (IP), reflecting the new routing of the Corridor and the new provisions brought about by the entry into force of the Regulation (EU) 1679/2024 . According to them, the IP shall include:

- a) a description of the characteristics of the freight corridor, including bottlenecks, and the programme of measures necessary to improve its organization and management;
- (b) the essential elements of the TMS
- (c) the objectives for the freight corridors, in particular in terms of performance of the freight corridor expressed as the quality of the service and the capacity of the freight corridor in accordance with the provisions of Article 19 of this Regulation, and, where relevant, quantitative or qualitative targets relating to these objectives. The objectives and the targets shall take into account the requirements set out in Article 19 of Regulation (EU) 2024/1679;
- (d) the measures to implement Articles 12 to 19 and the measures to improve the performance of the freight corridor, based on the results of the assessment referred to in Article 19(3), with a view to achieve the objectives and targets referred to in point (c)
- e) the views and assessment of the advisory groups referred to in Article 8(7) and 8(8) with respect to corridor development.
- (f) a summary of the cooperation and the results of the consultation referred to in Article 11, including the opinions of the advisory groups referred to in Articles 8(7) and 8(8) and a summary of the responses of other stakeholders.

When drawing up the implementation plan, the management board shall take into account the objectives and measures contained in the work plan of the European Coordinator, referred to in Article 54 of new TEN-T Regulation. The implementation plan shall include a reference to the elements of the work plan which are relevant for rail freight traffic along the corridor.

The implementation plan shall take into account the development of terminals including the market and prospective analysis on multimodal freight terminals as well as the action plans of the Member States of the freight corridor, referred to in Article 36(3) and (4) of Regulation 1679/2024.

The Rail Freight Corridors take part in the RNE NS&CID WG, which yearly reviews the content/structure of the CID (of which the IP is part) with the aim of having a common structure applicable to all the RFCs.

The IP is drafted by the Management Board of the RFC and it is validated by its Executive Board.

Due to different timelines for the elaboration of other documents that could have an impact on the IP, not all elements of the IP are dealt with but that updates can be done when they become available.

## 2 Corridor Description

The Baltic–Adriatic RFC, represents a North – South axis and connects ports in Poland, Slovenia, Italy and Croatia with main land terminals of all the countries along the corridor.

The routing of the Baltic–Adriatic RFC is the following: Świnoujście – Wrocław – Česká Třebová – Brno – Vienna Gdynia – Katowice – Ostrava – Přerov / Žilina – Bratislava / Vienna / Klagenfurt – Udine – Venice / Trieste / Bologna -Ancona -Bari / Ravenna / Budapest – Veszprém / Sopron – Szombathely – Zalaegerszeg / Graz – Maribor / Ljubljana – Koper / Trieste/Zagreb-Rjeka/Split



Picture 1 – Map from Annex III Reg. (UE) 2024/1679

The Baltic–Adriatic RFC as infrastructure backbone creates connections and supports growing economies along the Corridor’s regions. The Baltic–Adriatic RFC and its hinterland connections potentially allow flows of larger volumes of goods between industrial centres along the Corridor and from/to Adriatic and Baltic ports.

The lines of the BA RFC are the freight railway lines of the BSAS ETC. The latter is coordinated by the EU Coordinator Ms Anne Jensen. She is supported by an adviser, Mr Marcin Wojcik and a consultant, TPlan Consulting.

## 2.1 Key Parameters of Corridor Lines

Regulation (EU) 2010/913 – Article 9 (1.a) also requests a description of the characteristics of the freight corridor.

BA RFC uses the Customer Information Platform (CIP) to display the infrastructural information of the Corridor. CIP is an interactive, Internet-based information tool, that has been developed together with other RFCs as well as RailNetEurope. By means of a Graphical User Interface, CIP provides precise among other information, the routing and specific line properties.

Considering the modification in the Corridors routing as a result of the Regulation (EU) 2024/1679, the relevant CIP alignment is still in progress.

In this first IP version all RFC BA lines are listed in the Annex I attached to this document.

The Annex also describes some properties for freight lines that are considered as TEN-T priorities such as:

- Axle load
- Electrification
- Intermodal Freight Code
- Track gauge
- Maximum Train Length
- Maximum Speed

Please note, that the Annex is not intended to give an overview of compliance with the TEN-T criteria.

In addition to the TEN-T parameters, RFC BA also provides information on the following parameters

- Number of tracks
- Train protection system
- Gradient in both directions
- Usage of the line (passenger, freight, combined)

## 2.2 Corridor Terminals

According to Article 2(2) of Regulation (EU) No 913/2010 amended by Regulation (EU) No 1679/2024, terminals are defined as those facilities provided along the freight corridor, which have been specially arranged to allow either the loading or the unloading of goods onto/from freight trains and the integration of rail services with road, maritime, river and air services, and either the forming or modification of the composition of freight trains and where necessary, performing border procedures at borders with European third countries.

The Corridor updated the pre-existing lists of terminals, which were published with the previous Implementation Plans (and in the CID Section 3.2), supplemented by terminals located on the new routes provided by the Regulation (EU) 2024/1679 to give the best possible representation.

The full list can be found in the Annex II to this Implementation Plan.

Furthermore, Article 36 (3) of Regulation (EU) 2024/1679 provides that Member States shall conduct a market and prospective analysis on multimodal freight terminals on their territory by the latest 19th of July 2027. This analysis must examine the current and the future traffic flows of freight, per transport mode. It should also identify the existing multimodal freight terminal of the trans-European transport network on their territory and assess the need for new multimodal freight terminals or additional transshipment capacity in the existing ones. Finally, the analysis shall evaluate how to ensure adequate distribution of multimodal freight terminals with adequate transshipment capacity in order to meet the identified needs taking into account the terminals located in border areas of neighbouring Member States.

As soon as the results of this study are available, the Corridor will adapt the list as part of an update to the Implementation Plan.

## 2.3 Bottlenecks

For the purposes of this documents infrastructure “bottlenecks” are understood here as “*places of not sufficient capacity resulted from temporary bigger traffic needs (TCR not considered) than current infrastructure capacity*” and in particular for infrastructure bottlenecks: “*Bottlenecks resulting from*

*actual status of the Infrastructure<sup>1</sup>*. This definition includes as well the infrastructure declared congested in accordance with Art 47 of Directive (EU) 2012/34.

Bottlenecks are operational when relate to the following:

- Communication between IMs at the traffic control centers (e.g. English speakers available 24/7)
- Operational rules between RUs and IMs at the borders (e.g. tail lights)
- Flow of communication among RUs and between RUs and IMs at the borders

An overview, drafted on the basis of the contribution of individual Infrastructure Managers, of infrastructural bottlenecks (table 1) and operational bottlenecks (table 2) is presented below.

Regarding table 1, according to Reg. (EU) No 913/2010 art 9(1)(a), it has been reported a list of bottlenecks along the corridor, as explicit and complete as possible, including in particular infrastructure declared congested in accordance with Art 47 of Directive (EU) No 2012/34, and their impact on cross-border freight traffic along the corridor.

As far as the measures to eliminate or mitigate the effects of the bottlenecks are concerned:

- For the operational bottlenecks, are indicated in table 2 below
- For the infrastructure bottlenecks are represented by the Investments reported in the list of projects drafted by EU Coordinator with the Member States.

---

<sup>1</sup> See original Implementation Plan

### 2.3.1 Infrastructure bottlenecks

Table of Infrastructure Bottlenecks					
Country*	Line/section or station/terminal/junction	Infrastructure side (description)	** Congested Infrastructure (Y/N)	*** Impact on Freight Cross Border traffic (N,L,M,H)	Border impacted
					Name
PL	Wrocław - Jelcz - Opole	insufficient track condition on some sections, local speed restrictions caused mainly by bad state of engineering structures, capacity bottlenecks, signalling devices requiring reconstruction	N	L	Chałupki/Bohumín
PL	Opole - Kędzierzyn Koźle	no parameter of 750 m length	N	L	Chałupki/Bohumín
PL	Katowice - Tychy - Czechowice Dziedzice - Zebrzydowice	Insufficient track condition on some sections, local speed restrictions caused mainly by bad state of engineering structures, bottlenecks restricting capacity	N	M	Zebrzydowice/Petrovice u Karviné
PL	Gdynia - Gdańsk - Tczew	Capacity is exhausted in the current railway operation - possible insufficient capacity	N	N	-
PL	Tczew - Katowice	Insufficient track condition on some sections, local speed restrictions caused mainly by bad state of engineering structures, bottlenecks restricting capacity	N	N	-

PL	Czechowice Dziedzice - Zwardoń border PL/SK	Border crossing Skalité -Zwardoň, Single track, max train length 330/360m	N	M	Zwardoň/Skalité
SK	Čadca -Skalité	Border crossing Skalité -Zwardoň, Single track, max train length 330/360m	N	M	Skalité/Zwardoň
SK	Junction Bratislava	tunnels in section Bratislava Lamač – Bratislava hl.st. (lack of capacity), low speed - Existing single track Bratislava hl. St. – Bratislava Nové Mesto – exhausted capacity proposal for doubling.	N	N	-
SK	Bratislava - Dunajská Streda	Lack of capacity due to: single line operation, no electrification	N	N	-
SK	Žilina zr.st - Žilina	Speed restriction - 40 km/h	N	N	-
HU	Rajka s.b. - Hegyeshalom	single track; Max. axle load < 22.5t; track conditions deteriorating	N	M	Rusovce - Rajka
HU	Hegyeshalom - Csorna	Max. axle load < 22.5t; Max. train length < 740m; track conditions deteriorating; no ETCS	N	L	Rusovce - Rajka
HU	Csorna - Porpác	Max. axle load < 22.5t; Max. train length < 740m; track conditions deteriorating; InterCity traffic every two hours per direction; no ETCS	N	L	Rusovce - Rajka
HU	Porpác - Szombathely	Max. axle load < 22.5t; track conditions deteriorating; high density of InterCity and commuter trains; no ETCS	N	L	Rusovce - Rajka
HU	Szombathely	outdated track and signalling infrastructure; Max. speed <100km/h; capacity problems for freight; no ETCS	N	L	n/a

HU	Szombathely - Vasvár	max. 100 km/h track speed; max. 21 t axle load; stations not suitable for crossing 740m long trains; track conditions deteriorating; no ETCS/ERTMS	N	M	Őriszentpéter - Hodoš Gyékényes - Koprivnica
HU	Vasvár - Pácsony	max. 80 km/h track speed; 13‰ elevation; max. 21 t axle load; track conditions deteriorating; no ETCS/ERTMS	N	M	Őriszentpéter - Hodoš Gyékényes - Koprivnica
HU	Pácsony - Egervár- Vasboldogasszony	max. 100 km/h track speed; max. 21 t axle load; stations not suitable for crossing 740 m long trains; track conditions deteriorating; no ETCS/ERTMS	N	M	Őriszentpéter - Hodoš Gyékényes - Koprivnica
HU	Egervár-Vasboldogasszony - Zalaszentiván	max. 80 km/h track speed; max. 21 t axle load; stations not suitable for crossing 740 m long trains; track conditions deteriorating; no ETCS/ERTMS Change of direction of trains at Zalaszentiván when going to Hodoš/Koper	N	M	Őriszentpéter - Hodoš Gyékényes - Koprivnica
HU	Sopron-Rendező - Harka	single track line; max. 100 km/h track speed; max. 21 t axle load; high density of domestic and international passenger trains at least hourly; no ETCS/ERTMS	N	H	Sopron - Baumgarten Sopron - Loipersbach-Schattendorf
HU	Sopron-Rendező - Pinnye	single track line; max. 100 km/h track speed; max. 21 t axle load; at least hourly regular interval commuter trains; every two hours Intercity trains; no ETCS/ERTMS	N	M	Sopron - Baumgarten Sopron - Loipersbach-Schattendorf
HU	Pinnye - Fertőszentmiklós	single track line; max. 120 km/h track speed; max. 21 t axle load; at least hourly regular interval commuter trains; every two hours InterCity trains; no ETCS/ERTMS	N	M	Sopron - Baumgarten Sopron - Loipersbach-Schattendorf

HU	Fertőszentmiklós - Petőháza	single track line; max. 100 km/h track speed; max. 21 t axle load; at least hourly regular interval commuter trains; every two hours Intercity trains; no ETCS/ERTMS	N	M	Sopron - Baumgarten Sopron - Loipersbach-Schattendorf
HU	Csorna - Győr	single track line; max. 120 km/h track speed; max. 21 t axle load; high density of passenger trains at least hourly regular interval commuter trains; every hours Intercity trains no ETCS/ERTMS	N	H	Sopron - Baumgarten Sopron - Loipersbach-Schattendorf
AT	Gloggnitz-Mürzzuschlag	Bottlenecks regarding infrastructure parameters: very low speed, very large gradients, limited gauge (because of tunnels)	N	M	Bernhardsthal/Breclav, Marchegg/Devínska N. Ves, Kittsee/Bratislava - Petržalka, Thörl-Maglern/Tarvisio Boscoverde, Spielfeld- Straß/Šentilj
AT	Marchegg - Border AT/SK	Bottlenecks regarding infrastructure parameters: Possible insufficient capacity (because of single-track line) in a midterm perspective	N	H	Marchegg/Devínska N. Ves
AT	Wien Meidling - Mödling	insufficient capacity, capacity overload	Y	N	-
AT	Werndorf - Border AT/SI	possible insufficient capacity (because of single-track line) in a midterm perspective	N	H	Spielfeld-Straß/Šentilj
HR	Section Križevci - Kopivnica- State Border	Capacity limitation due to one track	Y	H	(Gyekenyes)
HR	Section Dugo Selo - Križevci	Capacity limitation due to one track	Y	M	(Gyekenyes)



HR	Station Dugo Selo	Dugo Selo station primarily, and to a less extent station Sesvete also, represent the bottlenecks, especially in the peak hour of passenger traffic	Y	L	(Gyekenyes)
HR	Section Hrvatski Leskovac - Karlovac	Capacity limitation due to one track	Y	N	
HR	Moravice - Rijeka	Bottlenecks regarding infrastructure parameters: very low speed, very large gradients, limited gauge (because of tunnels)	Y	N	
HR	Fužine	Station conditions resulting in limitation of trains length	Y	N	
HR	Gračac - Split	Bottlenecks regarding infrastructure parameters: very low speed, very large gradients, limited gauge (because of tunnels)	N	N	
SI	section Ljubljana - Divača	Insufficient capacity, short station tracks	N	H	Villa Opicina/Sežana
SI	section Divača - Koper	Short station tracks, single track line, lack of capacity	Y	M	Villa Opicina/Sežana, Šentilj/Spielfeld-Straß
Si	Station Ljubljana (node)	Insufficient capacity, short station tracks,	N	L	Villa Opicina/Sežana, Šentilj/Spielfeld-Straß
SI	section Zidani Most - Pragersko	Insufficient capacity, short station tracks,	N	L	Šentilj/Spielfeld-Straß
IT	Udine - Ronchi	Capacity limitation due to signaling system	Y	H	Tarvisio/Thörl-Maglern
IT	Udine Node	Capacity limitation due to one track	Y	M	Tarvisio/Thörl-Maglern
IT	Tarvisio Line	Station conditions resulting in limitation of trains length	N	M	Tarvisio/Thörl-Maglern
IT	Villa Opicina - Bivio D'Aurisina	Capacity limitation due to signaling system	Y	H	Villa Opicina/Sežana

IT	Villa Opicina Node	Station conditions resulting in limitation of trains length	Y	H	Villa Opicina/Sežana
IT	Trieste Node	Station conditions resulting in limitation of trains length from/to Port of Trieste	Y	M	Tarvisio/Thörl-Maglern, Villa Opicina/Sežana
IT	Venezia Node	Stations Conditions	Y	N	-
IT	Venezia - Trieste	Capacity limitation due to signaling system	Y	M	Tarvisio/Thörl-Maglern, Villa Opicina/Sežana
IT	Castelfranco – Treviso - Udine	Capacity limitation due to signaling system	Y	H	Tarvisio/Thörl-Maglern
IT	Bologna - Padova		Y	L	Tarvisio/Thörl-Maglern, Villa Opicina/Sežana
IT	Bologna - Termoli		Y	N	
IT	Termoli - Lesina	Capacity limitation due to one track	Y	N	
IT	Lesina - Bari		Y	N	
IT	Ferrara - Rimini	Capacity limitation due to one track	Y	N	

ITALY - All the Bottlenecks in the table have been considered on the base of the future development of freight traffics and Corridors. At the moment, in the short term, no bottleneck is critical.

\* CZ: SZCZ does not have any infrastructure bottlenecks

HU: (1) MAV does not have any infrastructure bottlenecks (2) GYSEV will take over several line sections in the second half of 2025

**\*\*Congested infrastructure** including the definition of Art 47 of Directive 2012/34/EU and the impact on cross-border freight traffic along the corridor

Y Yes

N No

**\*\*\*Level of Impact on Cross border Traffic if any**

N None

L Low

M Medium

H High

**Table 1 – Infrastructure bottlenecks on RFC Baltic-Adriatic**

### 2.3.2 Operational bottlenecks

Bottleneck	Where	Solution/Measures	Status	Who
Communication between TCCs in case of big disturbances	All RFC	Implementation of ICM Handbook	ICM handbook reviewed	IMs
		RNE language program	Ongoing IM-RU communication pilot with translation tool along the IT-SI borders (T4RAIL). Previous pilots on sections Villach-Tarvisio and Sezana-Villa Opicina have finished successfully. Daily telcos btw SLO-AT NTCCs since Jan 8th 2020, weekly telco AT-HU since March 2022.	
		Use two languages predefined messages (TIS Incident Management Tool)	TIS incident management tool already installed and in use.	
		Recommendation: for the future it would benefit to have English staff 24/7 in the national traffic control centres	Implemented from 2019. English speakers level A2+ by end of 2025 (for PLK, SZCZ, ZSR, HZI later)	
Locos change at the borders	All RFC	Multi-operating locos, faster loco change	In Tarvisio there is a project “XBorder” to allow Italian RUs to drive to Villach Sud. The wished effect is to have more infrastructure capacity. Timeline not fixed yet.	RUs
Technical inspection of rolling stocks at borders	All RFC	Better trust/cooperation among RUs	It should be investigated within IssueLog 2. Between SLO and AT most trains are on trust (no technical inspection at border)	RUs
Communication between cooperating RUs	All RFC	To order international train paths instead of two national paths (e.g. via PCS). From IMs side the task to do is to implement interfaces with PCS	RNE collected PCS interfaces implementation plans: IMs ready by 2024. RFC5 monitors needs for double requests and foster interface development (e.g. PLK-RNE meeting)	RUs, IMs
Cross border system communication	All RFC	Usage of TAF-TSI messages for data communication in planning & operations (train composition) between RUs	Several RUs don’t use it. RAG recognizes it as bottleneck	RUs

Table 2 –Operational bottlenecks on RFC Baltic-Adriatic

## 2.4 RFC Governance

The Baltic-Adriatic RFC was established in 2015 and its governance bodies are the Executive Board (made by the Member States representatives) and the Management Board (made by the IMs representatives). They consult with two Advisory Groups represented by the Railways Undertakings and the Terminals and with the European Coordinator of the ETC Baltic Sea-Adriatic Sea. The Managers carry on the strategic and operational tasks of the EEIG in line with Ga with the support of the Coordination Group and the Working Groups.

The Management Board took the legal form of a European Economic Interest Grouping (EEIG) in 2016. Its first seat was in Warsaw, Poland. The General Assembly of the EEIG took over the tasks of the Management Board of the RFC. In 2019, the seat of the EEIG moved to Venice, Italy.

A few changes in the composition of the governance and operational bodies of the RFC/EEIG have occurred along the years. Related information can be found in Section 1.4 of the CID, as well as on the RFC webpage and in the Annual Reports.

As already mentioned, in accordance with the provisions of the EU Reg 1679/2024, the Corridor is currently progressing on the adjustment of its governance.

The Regulation provides a period of 18 months from the date it entered into force in order for the governance of the Baltic-Adriatic RFC to adapt to the new routing, meaning extending the existing ExBo, General Assembly and RAG/TAG to the two new Member States, their respective infrastructure managers and Allocation Body, RUs and Terminals.

The new Members' representatives have already joined the Executive Board during the first semester 2025. At the end of 2025 the new Members are joining the EEIG thus completing the extension of the General Assembly too. The RAG&TAG are planned to be extended in October 2025.

## 3 Transport Market Study

The updated Transport Market Study of Baltic-Adriatic RFC was finalized in May 2025.

The aims of the update of the Transport Market Study of the Baltic-Adriatic RFC, conducted by Tplan Consulting & Panteia consortium, were:

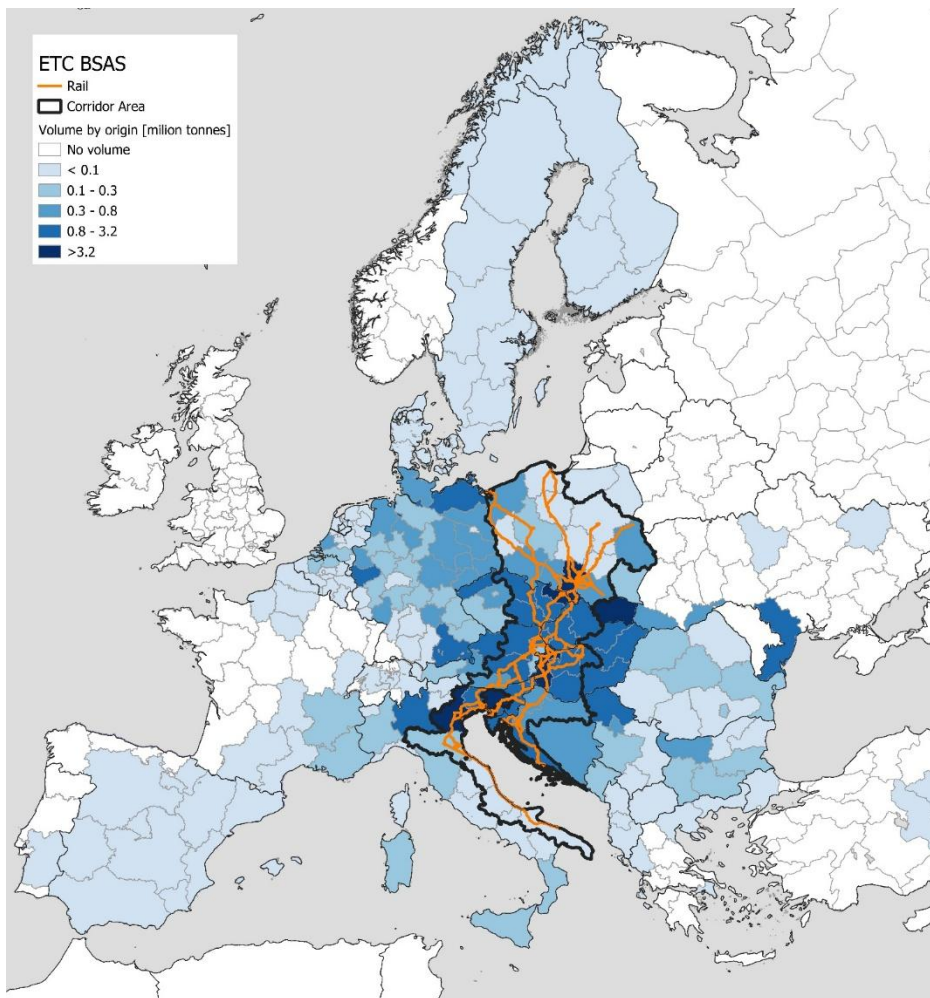
- Analysing the current situation of freight traffic volumes along the RFC, reflecting the new RFC alignment as the rail freight lines of the ETC Baltic Sea-Adriatic Sea
- Providing an updated knowledge base about the main ODs of freight traffic along the Corridor

- Providing a forecast with sensitivity analysis of the development of the rail freight market along the RFC

A summary of the main results is provided hereafter.

The catchment area for international rail freight transport of the RFC BA exceeds the corridor area. It captures (parts of) Germany, Romania, and other Balkan States. A large portion of the rail freight transport uses the RC BA and its border crossing points to ship freight by rail from different origins to different destinations (see overview in Figure 2 and Figure 3). Figure 2 below shows the origins of the RFC BA. The most important origins are Eastern Slovakia, Katowice, Ostrava, Koper/Ljubljana and Venice. The origins are partly port areas, which use the RFC BA to ship goods to the hinterland. In the catchment area, different zones can be seen that contribute significantly to the RFC BA.

*Figure 2 Origins of international rail freight volume (in million tonnes) that use the RFC BA rail freight network*

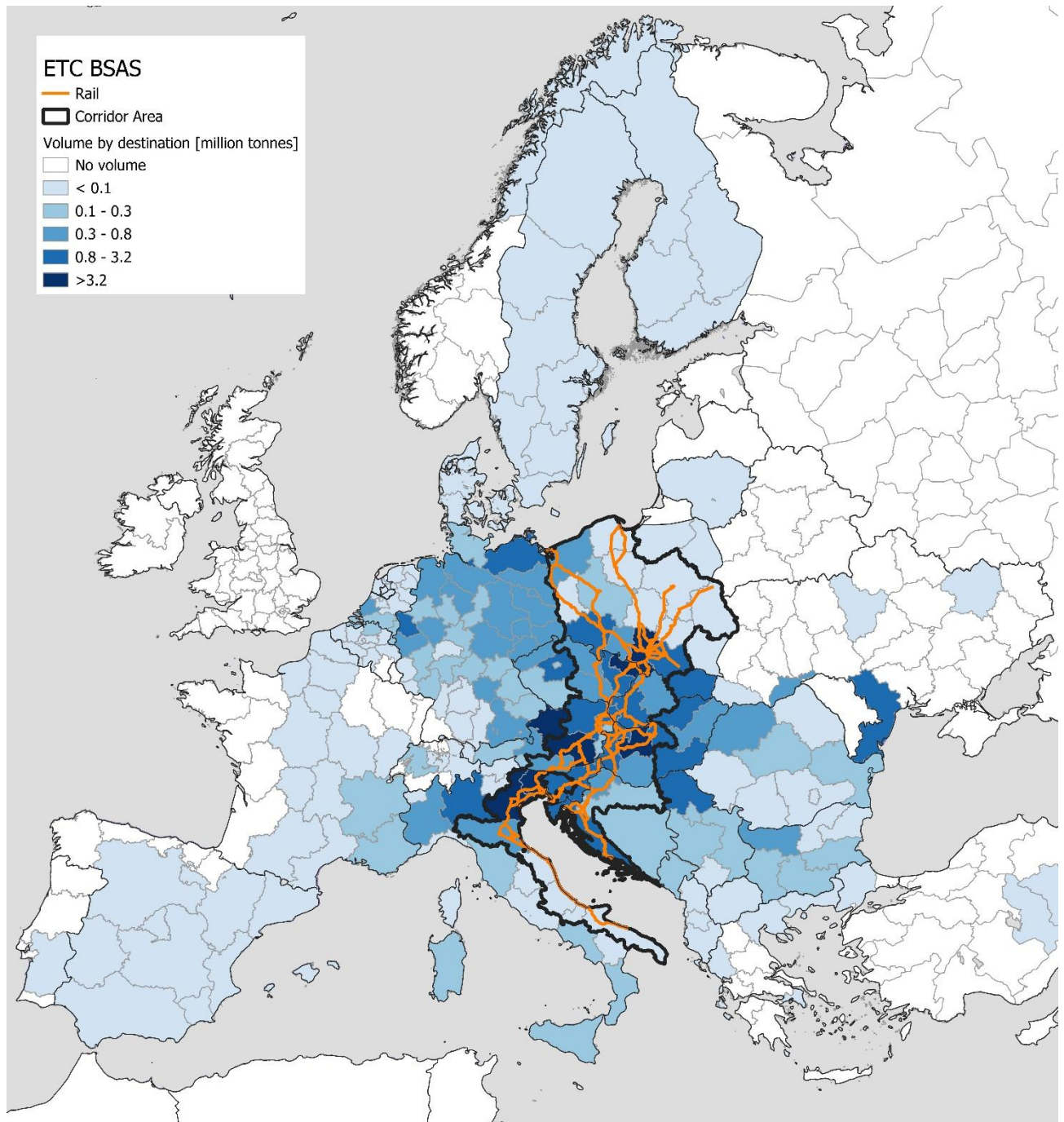


*Source: NEAC Model; Legend: Orange = railway lines of RFC BA. Blue = Volume by origin. Black = Delineation of freight corridor area*

Figure 3 presents the destinations within the RFC BA catchment area. The figure highlights similar zones as the origins that exhibit the high freight volumes dispatched from these destinations. It is

evident from the figure that numerous zones benefiting from RFC BA's services fall outside the corridor area, such as areas in the rest of Germany and Balkan States as well as Germany and Italy.

Figure 3 Destinations of international rail freight volume (in million tonnes) that use the RFC BA rail freight network

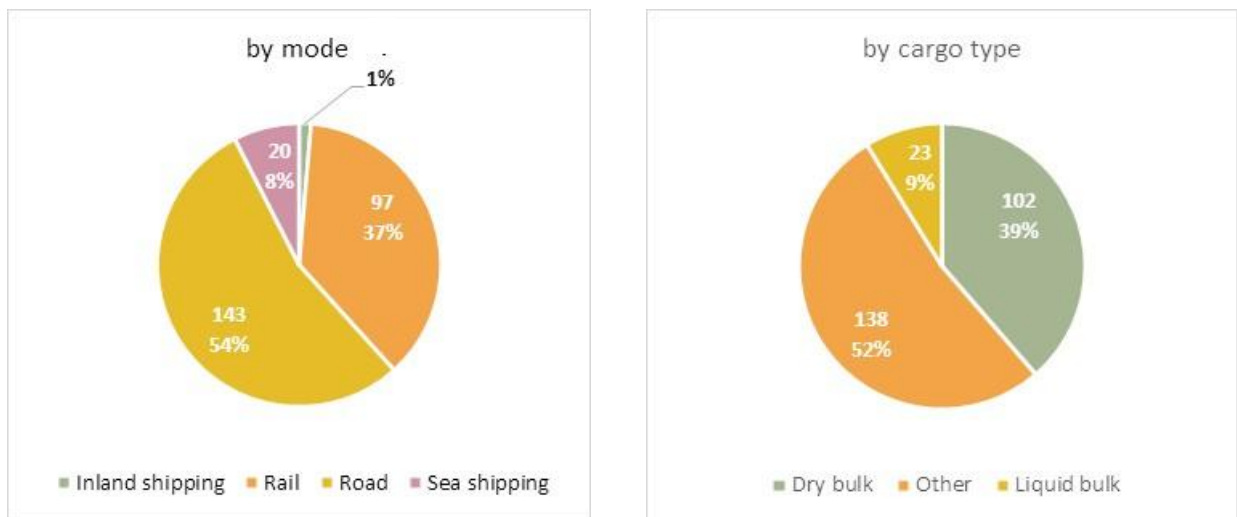


Source NEAC Model; Legend: Orange = rail tracks of RFC BA. Blue = Volume by destination. Black = Delineation of freight corridor area

The total volume of all international freight transport in the *catchment* area of the RFC BA is estimated at 263 million tonnes in 2022, transported by road, rail, inland shipping and sea shipping. The international rail freight transport volume in this area is estimated at 97 million tonnes. This is 37% of the total amount of freight transport for the RFC BA. The share of inland shipping is 1% (4 million tonnes), the share of road transport is 49% (116 million tonnes). Sea shipping has a share of 8% (20 million tonnes) (Figure 4).

Concerning the cargo types, *Other* (General cargo, including intermodal transport and container) is the most important one at 138 million tonnes (52%). *Dry bulk* is second in the international freight transport within the catchment area of the RFC BA, with a volume of 102 million tonnes (41%). Liquid bulk has a share of 9% (23 million tonnes) in the total volume of international freight transport over all modes in the catchment area of the RFC BA (Figure 4).

Figure 4 Estimated volume (million tonnes) and share of international freight transport by mode and cargo type in the corridor and catchment area of RFC BA

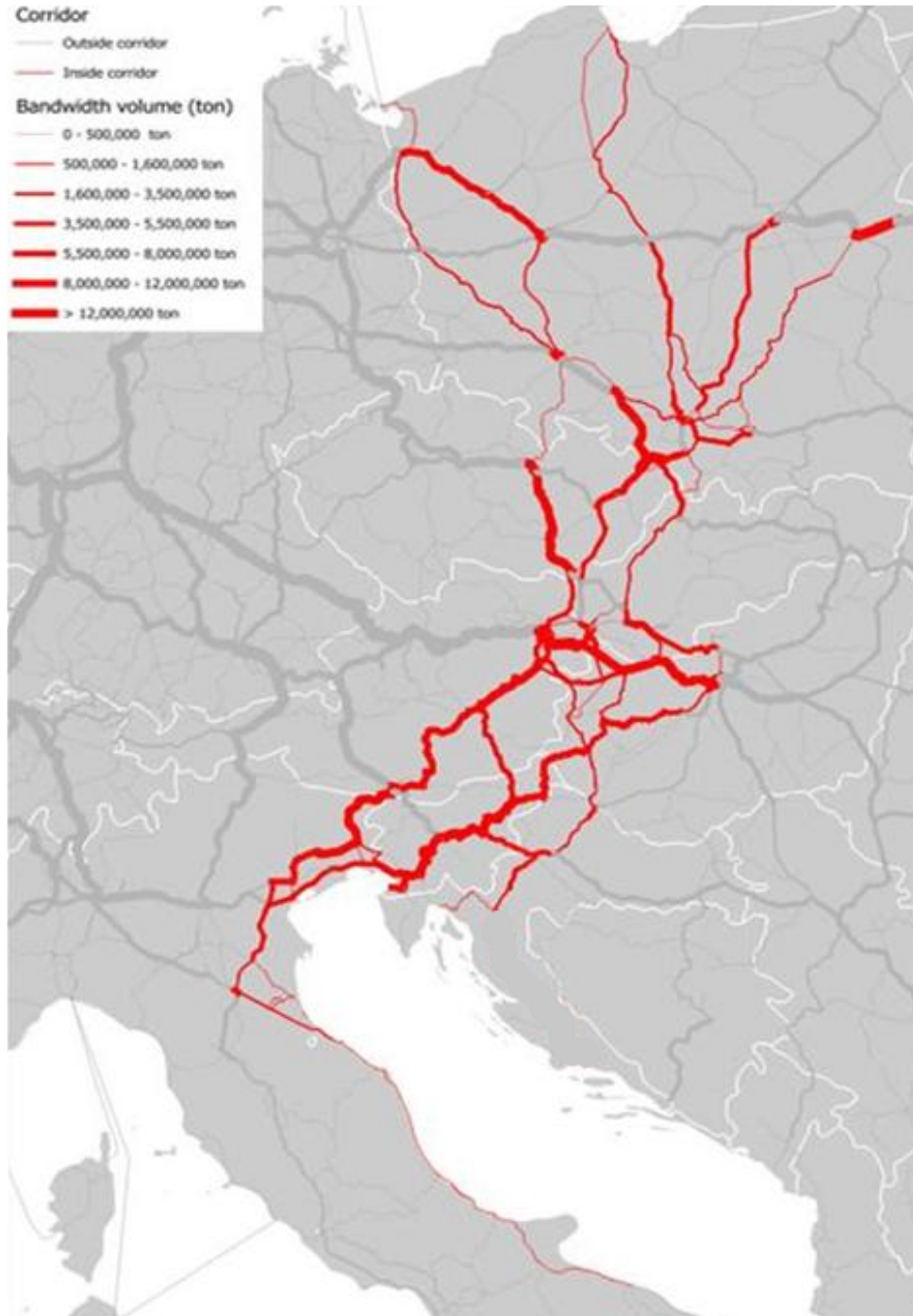


Source: NEAC estimations

Figure 5 shows the estimated international rail freight flows (in tonnes) for the RFC BA. This provides a general overview of the use of the main railway lines in the corridor area of the RFC BA (in red). Transport volumes on the RFC BA are not fully understandable if presented in isolation. The rail volumes on the different lines of the RFC BA often have an origin or destination elsewhere in Europe. Examining the map, a dispersed flow pattern is evident. The railway lines outside the corridor area are depicted in grey and belong to other ETC freight corridors. In the RFC BA, large international rail transport volumes can be observed in Austria, Slovenia, Czechia, Hungary and South Poland. In Mid

and East Poland, Croatia and Italy (South of Bologna), the railway lines have smaller volumes (less than 500,000 tonnes per year).

Figure 5 Estimated volume of international rail freight transport (tonnes) in 2022 in the RFC BA



Source: NEAC estimations

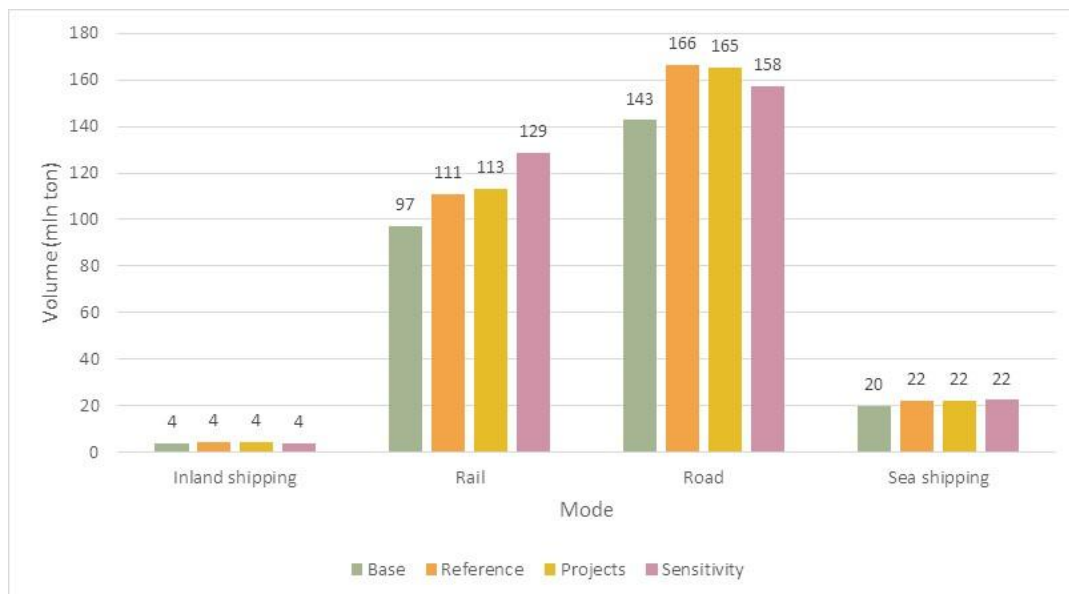
Between the 2022 Base year and the 2030 Reference scenario, all modes grow due to economic developments (Figure 6). Rail transport grows by 14% (14 million tonnes) from 97 to 111 million tonnes. Expressed in trains (average 600 tonnes), this concerns a growth from 161,700 to 185,000

trains. Inland shipping remains the same at 4 million tonnes (though relatively a large growth of 19%, absolutely the volume is small), road grows by 17% (23 million tonnes) from 143 to 166 million tonnes, and sea shipping by 12% (2 million tonnes) from 20 to 22 million tonnes.

The Projects scenario does not lead to a significant growth of transport in the RFC BA compared to the Reference scenario. An overall growth of 2 million tonnes over all modes is estimated. This growth is mainly due to the rail projects in the RFC BA.

The Sensitivity scenario shows a hypothetical development for rail transport, simulating the achievement of the TEN-T requirements. Compared to the 2022 Base year, a growth of 19% in total volume (49 million tonnes, from 263 to 312 million tonnes) is estimated. The modernisation of the railway lines, and especially the introduction of longer trains (740 meters) has a significant impact on this result. This is reflected in the growth of rail transport, which grows another 16% compared to the reference scenario from 111 million tonnes to 129 million tonnes. The growth has different causes, such as rerouting, modal shift, or splitting freight transport from one mode into transport by two modes (for instance, splitting road transport into road and rail transport).

Figure 6 Development of volume (in million tonnes) by mode and scenario for the catchment area of RFC BA



Source: NEAC estimation

A growth from 97 million tonnes to 111 million tonnes in the Reference scenario is estimated. The Projects scenario adds another 2 million tonnes to the total volume. The Sensitivity scenario will finally lead to a volume of 129 million tonnes.

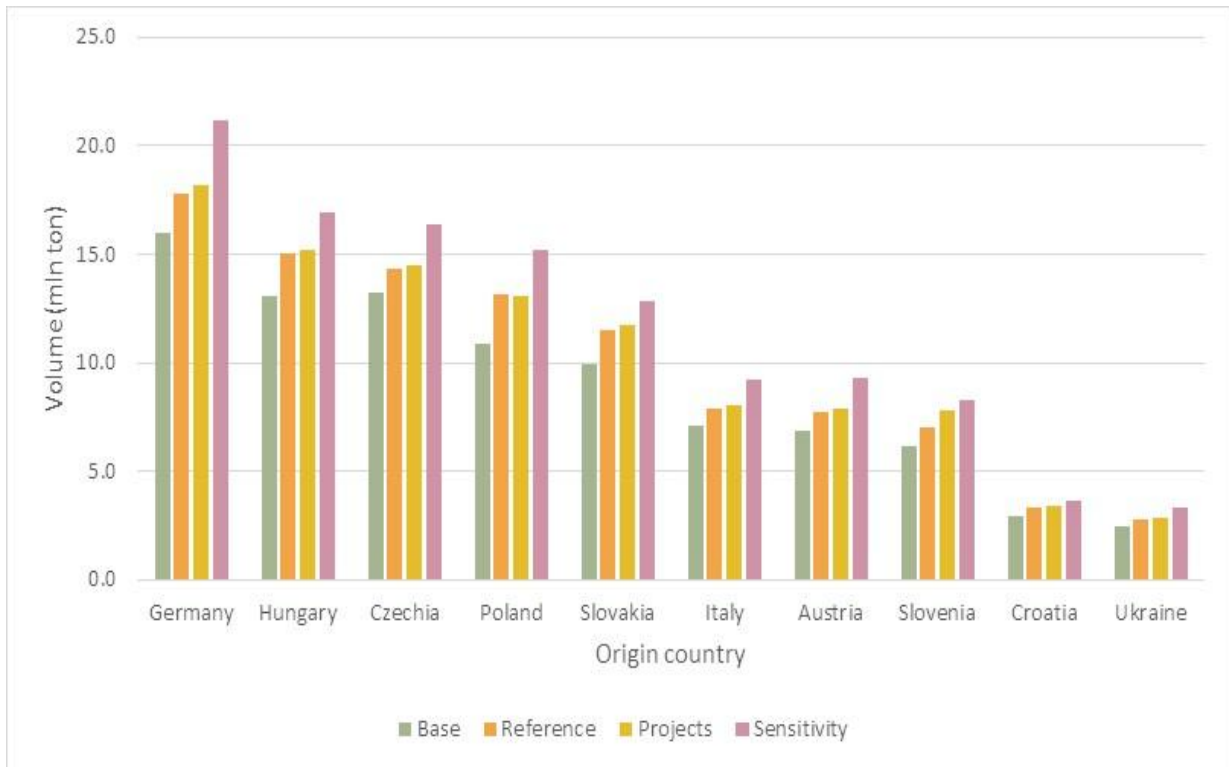
Figure 7 and

Figure 8 show the development of the volume in international *rail* freight transport for the origin and destination countries for the RFC BA catchment area. Concerning origin countries, international rail freight transport has the highest volume in Germany (17.8 million tonnes in the Reference scenario). Hungary and Czechia come in second and third place (at 15.0 and 14.4 million tonnes respectively).

The Projects scenario shows the impact of infrastructure projects on the volume of international rail freight transport. Overall, the growth in international rail volume for the top 10 countries is about 2% extra (about 2 million tonnes) compared to the Reference scenario. The potential extra volume, as shown by the Sensitivity scenario, is overall 18% higher (about 14 million tonnes) on the total volume compared to the Reference scenario. This growth is in all countries, more or less the same. This is primarily due to the assumed increase in train length up to 740 meters.

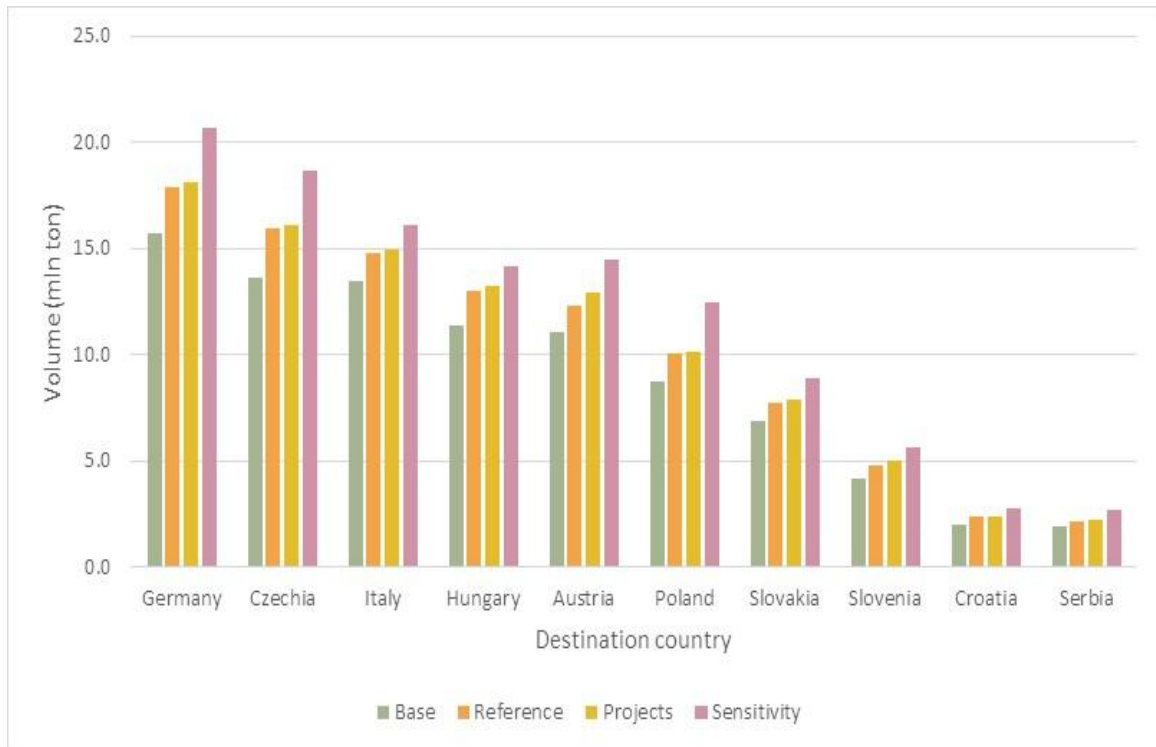
For the destination countries, a similar picture can be noticed. Germany ranks first in the RFC BA concerning international rail freight transport. It grows from 15.7 to 17.9 million tonnes between the 2022 Base year and the Reference scenario. Czechia is ranked second (grows from 13.4 to 16.0 million tonnes), and Italy is third (grows from 13.5 to 14.8 million tonnes) between the 2022 Base year and the Reference scenario. The impact of the Projects scenario is limited, whereas the Sensitivity scenario shows higher effects. Compared to the 2022 Base year, the growth in the Sensitivity scenario is, on average, 31% but varies from 20% (Italy) to 42% (Poland).

*Figure 7 Development of volume (in million tonnes) of international rail freight transport by origin country in the RFC BA corridor and catchment area*



Source: NEAC estimation

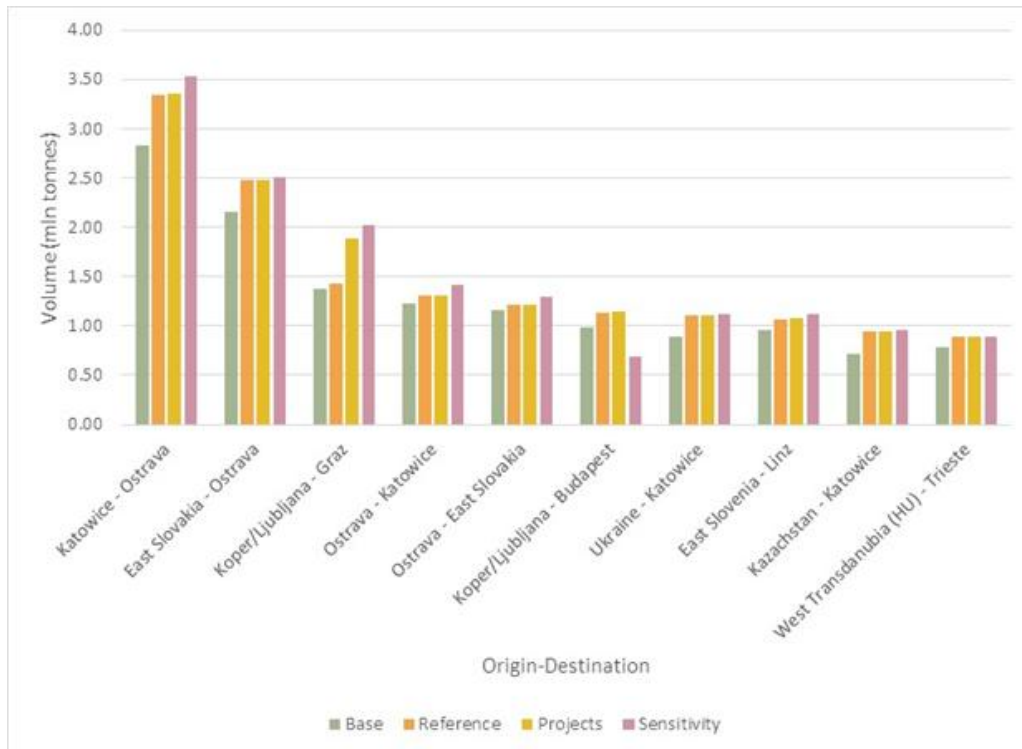
Figure 8 Development of volume (in million tonnes) of all international rail freight transport by destination country in the RFC BA corridor and catchment area



Source: NEAC estimation

Looking at the top 10 relations within the RFC BA (Figure 9), the main relation is between Katowice and Ostrava, which grows from 2.8 to 3.4 million tonnes between the 2022 Base year and the Reference scenario. The Project scenario also shows 3.4 million tonnes, while the Sensitivity scenario shows 3.5 million tonnes. In second place comes East-Slovakia - Ostrava, also with dry bulk as the main cargo type. This relation grows from 2.2 to 2.5 million tonnes from the 2022 Base year to the Reference scenario. In the Project and Sensitivity scenarios, the volume remains at around 2.5 million tonnes. Another important relation concerns Koper/Ljubljana - Graz, which has 1.4 million tonnes in 2022 and in the Reference, but grows in the Project to 1.9 million tonnes and to 2.0 million tonnes in the Sensitivity scenario. The completion of rail infrastructure projects by 2030 has a strong impact on rail freight in this relation.

Figure 9 Development of volume (in million tonnes) of international rail freight transport on the top 10 relations in the corridor and catchment area of RFC BA



Source: NEAC estimation

An Executive Summary is available for downloading at this [link](#) and more details can be found there.

For more information about the studies published by Baltic-Adriatic RFC in the previous years, reflecting the original alignment, please visit the relevant web page: [Studies](#).

## 4 List of Measures

As mentioned above, the update of the Implementation Plan does not contain details on the list of measures taken by the Baltic-Adriatic RFC to ensure the execution of the planned activities.

Updated information on these activities, can be found in other published documents on the Baltic-Adriatic RFC web page. The links below can be found in the relevant Corridor Information Document paragraphs of the Baltic-Adriatic RFC.

### 4.1 Coordination of planned temporary capacity restrictions

Information on planned temporary capacity restrictions (TCRs) measures on Baltic-Adriatic RFC can be found in Section 4.4. of the CID.

### 4.2 Corridor OSS

Information on the Corridor OSS (C-OSS) of Baltic-Adriatic RFC can be found in Section 4.2 of the CID.

### **4.3 Capacity Allocation Principles**

Information on the capacity Allocation principles on Baltic-Adriatic RFC can be found in Section 4.3 of the CID.

### **4.4 Applicants**

Information on how Baltic-Adriatic RFC manages Applicants can be found in Section 4.3.2 of the CID

### **4.5 Traffic Management**

Information on Traffic Management measures on Baltic-Adriatic RFC can be found in Section 4.5 of the CID

### **4.6 Traffic Management in the Event of Disturbance**

Information on Traffic Management measures in events of disturbance on Baltic-Adriatic RFC can be found in Section 4.5.3 of the CID

### **4.7 Corridor Information Document**

Baltic-Adriatic RFC publishes its Corridor Information Documents (CID) every year on the second Monday of January in the online platform called CIP, Customer Information Platform ([cip.rne.eu](http://cip.rne.eu)).

At the same time, CID is also available in the “[Network and Corridor Information Portal](#)” – NCI. In this portal, created under the RNE umbrella, NSs and CIDs are made available in a digitalized and user-friendly way.

### **4.8 Quality Evaluation**

#### **4.8.1 Performance Monitoring Report**

Please refer to Chapter 5 where it's described which KPIs will be published and where objectives and targets are defined and how the monitoring will be published.

## 5 Objectives and performance of the corridor

In the spirit of the EU Freight Regulation, Baltic-Adriatic RFC's vision can be summarized as follows: the role of the RFCs is to make the rail mode more competitive in order to attract new freight traffic from the road mode.

The RFCs face several challenges which the end users see as the key issues influencing their modal choice, such as:

- fragmentation of the logistic chain
- problems in gathering information in one place, by all stakeholders
- poor reliability of the rail transport mode

In order to address these issues, Baltic-Adriatic RFC strives to position itself as a platform facilitating the international cooperation among all actors of the freight logistic chain.

Therefore, Baltic-Adriatic RFC focuses on the following tasks:

- Market intelligence: carrying out studies and listening the railways users' needs to allow better and deeper knowledge of the regional freight market along the Corridor and to raise the necessary awareness to the needs of rail freight
- Laboratory of soft measures: piloting new products and services to offer to its users and implementing operational measures to address the areas of improvement identified through the studies or the users' feedback
- Information hub: providing information gathered from different platforms and making it easily available in a harmonized way; increasing the sector transparency and improving the quality of the available information tools (e.g. the data quality in RNE TIS);
- Resilience facilitator: providing support with the coordination of the International Contingency cases
- Performance improvement facilitator: putting in place processes, projects, QCOs (quality circles for operations), tools aimed at performance measurement/monitoring in the different business areas (e.g. KPIs) and support all stakeholders in defining/implementing corrective actions to improve the performance of international rail freight traffic along the Corridor (e.g. punctuality).

The RFC BA MB has drafted a strategy paper together with the ExBo.

In October 2022 the RFC BA ExBo has drafted a list of corridor objectives complemented by indicators operationalising the objectives based on an objectively defined methodology and target values for the indicators.

At first the ExBo identified some key indicators of the performance of the RFC. For each indicator an objective methodology was defined to measure it.

Being RFC BA part of the RFC Network, there has been an effort to pick up harmonized indicators, such as the RFC Network KPIs which have been published yearly.

The indicators were measured based on the latest performance and the performance of previous years of operations, to identify trends.

Consequently, the target values for the key indicators were set.

Such targets, which were shared with the MB, were short term. The reasons were:

- the limited time horizon of the Corridor CEF TA financing (till the end of 2024) which foresaw an assessment of the targets during the span of the financing;
- the coming soon revision of the Regulation 913/2010.

As all good targets, they have been assigned in compliance with the criteria that they should be reachable with the available resources provided by the actual Regulation and within the short-time frame of the CEF TA financing.

Therefore, once measured the latest measure of each indicator, its target was set in such a way to be challenging but not unrealistically too ambitious.

The performance since then was assessed once a year during the ExBo+MB meetings.

With the new TEN-T Regulation and the extension of the Corridor, the new Corridor Executive Board assigned new objectives and target values.

They have assigned keeping into account that the time horizon is still uncertain and the resources provided by the amended Regulation are scarce.

The indicators, their definitions and their targets are shown in the table 3.

Indicator	Methodology	Target
Capacity Requests rate (PaPs)	Km*days requested / Km*days offered (%)	30%
Fulfillment of customers' wishes	Rate of offered PaPs/wished by customers	80%
Punctuality at RFC entry	RNE TPM yearly KPI report	max Delta (Orig-Dest%) : 16%
Punctuality at RFC exit	RNE TPM yearly KPI report	
Punctuality at destination (real)	art 19 Regulation 1679/2024	>=75%
Dwell time at borders	art 19 Regulation 1679/2024	<=25min
long trains	art 19 Regulation 1679/2024	as of art 19
Quantity of Premium offer	Number of premium PaPs offered	6

Table 3

In parallel, a monitoring system has been set up and implemented to assess the current situation and monitor progress with respect to the targets.

By “premium offer” it is meant the offer of features for PaPs/RC that provide customers with more benefits than the standard catalogue paths offered by the single IMs of the RFC. For example, they are the offer of paths for longer or heavier trains than standard.

Baltic-Adriatic RFC publishes several reports of performance assessment. The Annual Report and the Monthly train Performance Management Reports can be found in CIP/RIS. Other RFC KPIs reports can be found on RNE site under this link: <https://rne.eu/corridor-management/rfc-kpis/>.

## 6 Cooperation and consultation in the frame of the Implementation Plan

### 6.1 Procedure of the cooperation with the advisory group

Speaking generally about the cooperation, two yearly meetings in presence are organized by the RFC GA with the AGs. Additionally, telcos are organized with the TAG upon request. During the yearly meetings, the RAG and TAG are consulted regarding the performance of the Corridor in relation to the set targets and the measures adopted to improve the performance when underperforming. In occasion of the RAG/TAG meeting in Nagycenk on May 14<sup>th</sup> 2025, the targets set by RFC BA ExBo and the performance of relevant indicators were presented. The RAG/TAG members took note of the presented information without remarks.

Furthermore, the RFC Network organizes yearly a meeting of its Managing Directors and Chairs with the RAG Speakers and TAG Speakers.

More specifically in the frame of the IP drafting, the cooperation and the consultation addressed in particular:

- (a) capacity needs of rail freight transport relevant for infrastructure and investment planning, in particular as regards freight trains with a length of no less than 740 m, taking into account the need for capacity pursuant to Article 14(2) of this Regulation and any infrastructure declared congested pursuant to Article 47 of Directive 2012/34/EU;
- (b) TEN-T infrastructure requirements relevant for rail freight transport as defined in Chapters II and III of Regulation (EU) 1679/2024.
- (c) need for targeted investments to remove local bottlenecks, improvements to nodes and rail access routes or technical equipment enhancing operational performance

Regarding (b) and (c) the RFC GA has addressed the RAG and TAG in the following way.

It has created a mailing list based on the existing RAG/TAG list of the Baltic-Adriatic RFC and asked the Hungarian and Croatian IMs and AB to add the contacts of RUs with international freight trains and terminals/ports operating in their countries.

The mailing list was addressed by the Executive Manager for consultation on the infrastructure and investments needs.

Meantime the same members of the mailing list were invited to attend a RAG/TAG physical meeting in Nagycenk on May 14<sup>th</sup>. The information was also provided on the RFC website. The agenda of the meeting foresaw, among others, the consolidation of the consultation on investment needs.

Besides, the RUs appointed a RAG Speaker during such meeting. As for the TAG, the current TAG Speaker of the Baltic-Adriatic RFC expressed the will to continue the job.

As regards to (a), the question was raised during a physical RAG/TAG meeting held in Krakow in October 2024 at the presence of the ETC BSAS Coordinator. The RUs indicated the possibility to be offered with paths for 740m-long trains as one of the top priorities for the RFC BA.

After the projects list consultation, the RFC Governance is finalizing the draft of the IP. Once got the final draft, it will be distributed to the RAG/TAG in order to collect their remarks and feedbacks, to be added in chapter 6.3.

## **6.2 Views and assessment of advisory groups regarding corridor development**

During the RAG/TAG meeting held in Nagycenk on May 14<sup>th</sup>, the inputs gathered by email by RUs and Terminals were presented. It was explained the IMs and core terminals were involved in the draft of the projects list. A map of the Corridor distinguishing between core and extended core lines was shown. The attendants were asked to consolidate the inputs into a common view. It was agreed to extend the deadline to provide inputs till May 16<sup>th</sup> 2025. Then, the RFC BA Managers put together the received inputs and sent them to the ETC Coordinator' staff.

A summary of the outcome of the consultation is reported into the annex III.

## **6.3 Results of the consultation of the draft Implementation Plan**

The issue of infrastructure bottlenecks must be explicitly recognized as one of the principal obstacles to achieving the EU's environmental objectives, including the "Green Deal," the "Shift2Rail" initiative, and the broader goal of increasing rail transport modal share in the future.

Accordingly, the resolution and identification of infrastructure bottlenecks should not be the sole responsibility of Infrastructure Managers (IMs) but must also involve coordinated efforts and cooperation with Railway Undertakings (RUs).

Operational bottlenecks and potential solutions should be jointly assessed and addressed through structured dialogue and collaboration between IMs and the relevant RUs. Therefore we welcome the

role of the RFC as a cooperation platform to identify and mitigate the operational bottlenecks at regional level.

Resolving infrastructure bottlenecks will simultaneously lead to a significant reduction in operational bottlenecks, thereby making the shared goals of RUs, IMs, Member States (MSs), and the European Commission (EC) more attainable.

Railway infrastructure and terminals are constructed primarily for the use of railway operators. In this respect, RUs are the end-users—effectively customers—of the IMs and the Rail Freight Corridors (RFCs)/European Transport Corridors (ETCs) and should be treated accordingly.

The presentation of jointly defined infrastructure bottlenecks to MSs and ETC Coordinator shall serve as a guiding framework for determining investment priorities, both at the national and corridor levels (RFC/ETC).

The RFC Executive Board should remain open to recommendations submitted by RFC Railway Advisory Group (RAG) members and is expected to ensure timely and transparent information exchange with all stakeholders, while duly considering feedback received.

The TEN-T Regulation mandates the ongoing development of railway infrastructure to achieve common strategic goals.

Additional priorities mandated by the TEN-T Regulation are the reduction of dwell times to a maximum of 25 minutes at borders and of delays to a maximum of 30 minutes at the final station for international freight trains. Another critical requirement is the accommodation of train lengths of up to 740 meters, followed by the full electrification of relevant rail lines. These operational priorities, combined with the reduction of bottlenecks, represent essential steps toward addressing existing capacity shortages. We therefore welcome that such operational priorities have been mentioned by the Executive Board among the RFC targets in chapter 5. We ask for a regular monitoring of the progresses and we are open to a structured dialogue within the RFGovernance in order to improve them.

This approach will enhance the competitiveness of railways in the broader transport market—particularly against road transport—by making rail more attractive, cost-effective, and efficient. These improvements are vital to increasing freight volumes and transporting more goods with the same number of trains, thus supporting the EU's climate targets through significant reductions in CO<sub>2</sub> and other greenhouse gas emissions.

The role of the RFGovernances in consolidating and presenting the shared interests and needs of both RUs and IMs to the EC and national governments will become even more critical in the coming years.

These issues—alongside bottlenecks—carry equal importance for RUs and must be communicated to governmental authorities.

**Annexes:**

I Lines & parameters

II Terminals

III Outcome of the consultation of the projects list with the Advisory Groups