



Joint RAG/TAG Meeting of Baltic-Adriatic, Rhine-Danube & Amber RFCs

Sopron, May 14th 2025

Agenda

1. Opening & welcome

2. Memorandum of Understanding of the RAG

3. Capacity management

4. Latest developments of the RFCs

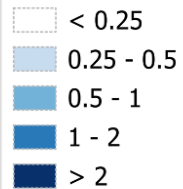
5. Infrastructure

6. Operations & Performance

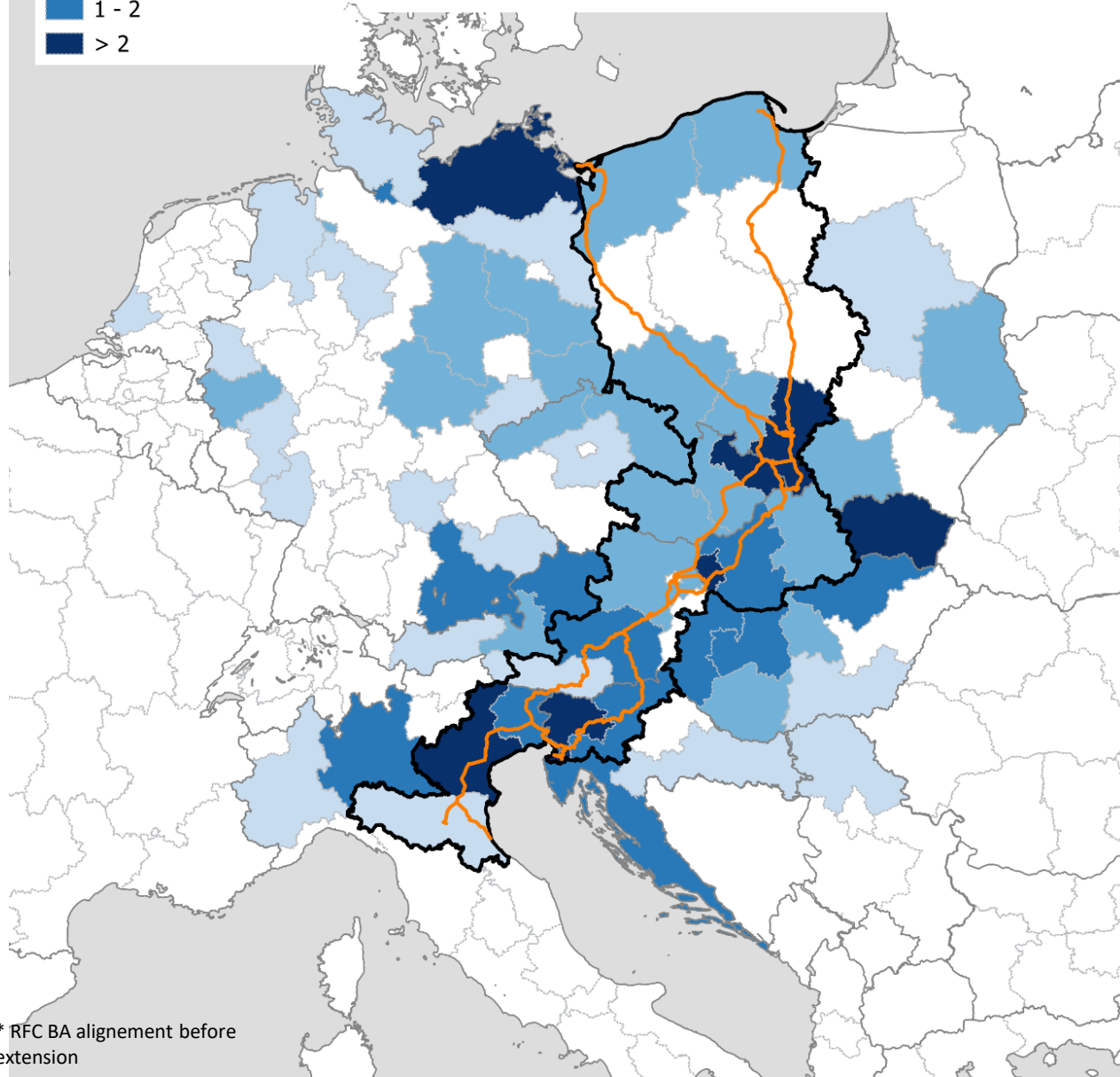
7. 5 years of RFC Amber

8. Conclusions & AoB

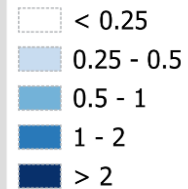
RFC BAC - Origin (x mln ton)



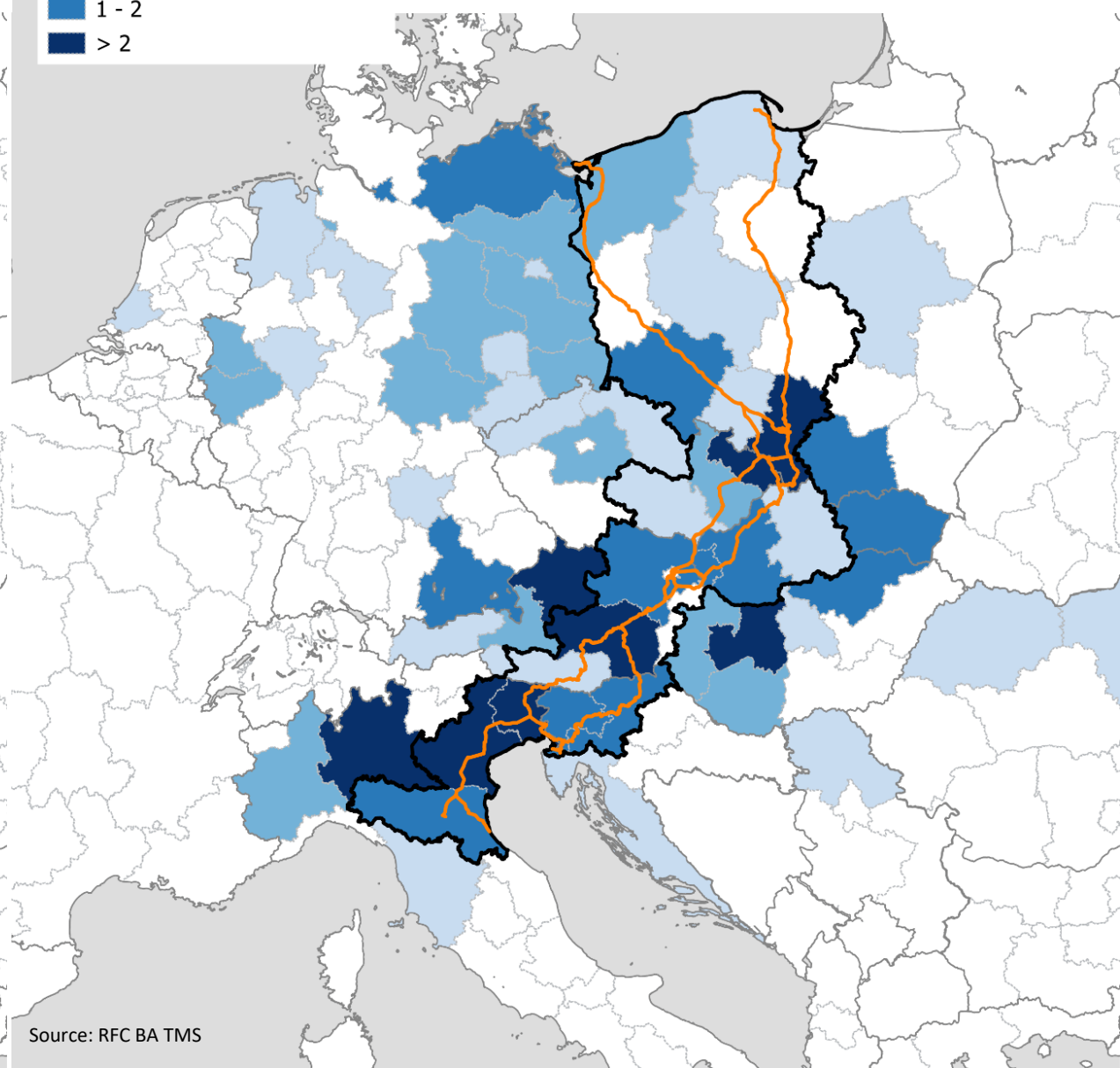
The catchment area of the RFC BA* : 2022 Origins of international Rail freight volumes that use RFC BA



RFC BAC - Destination (x mln ton)



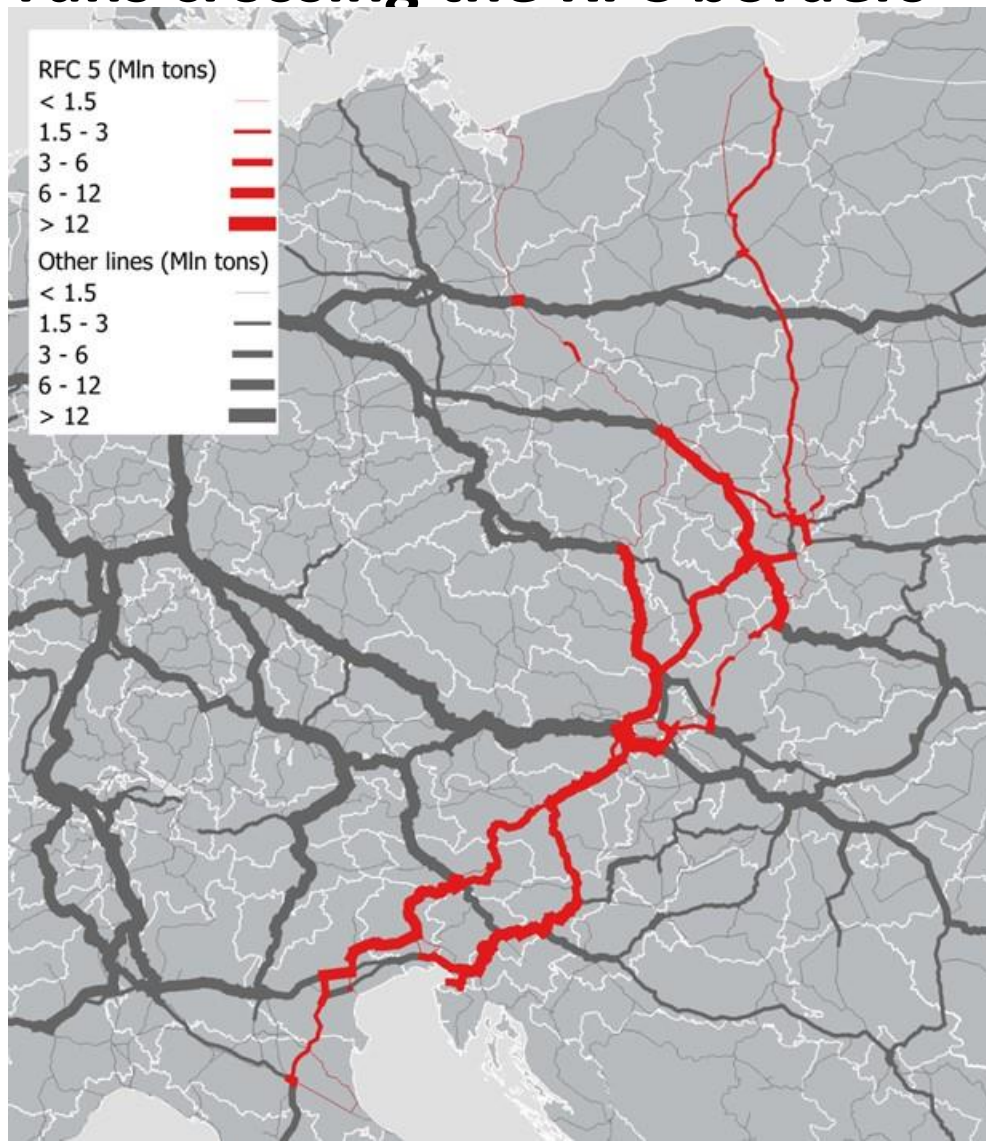
The catchment area of the RFC BA* : 2022 Destinations of international Rail freight volumes that use RFC BA



* RFC BA alignment before
extension

Source: RFC BA TMS

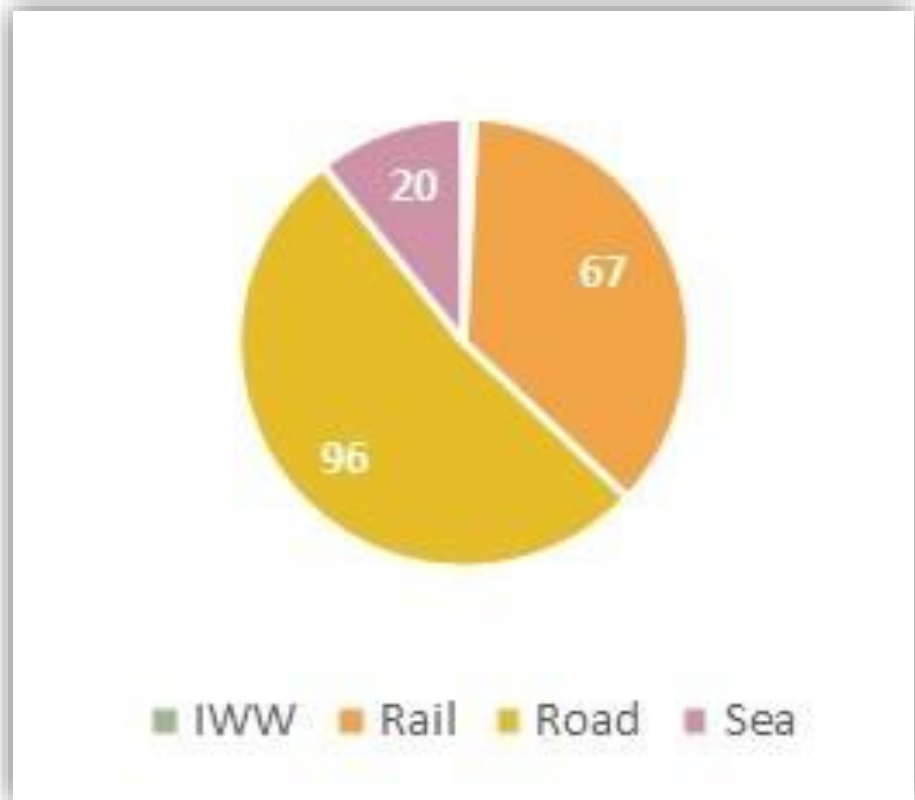
Tons of freight train runs crossing the RFC borders



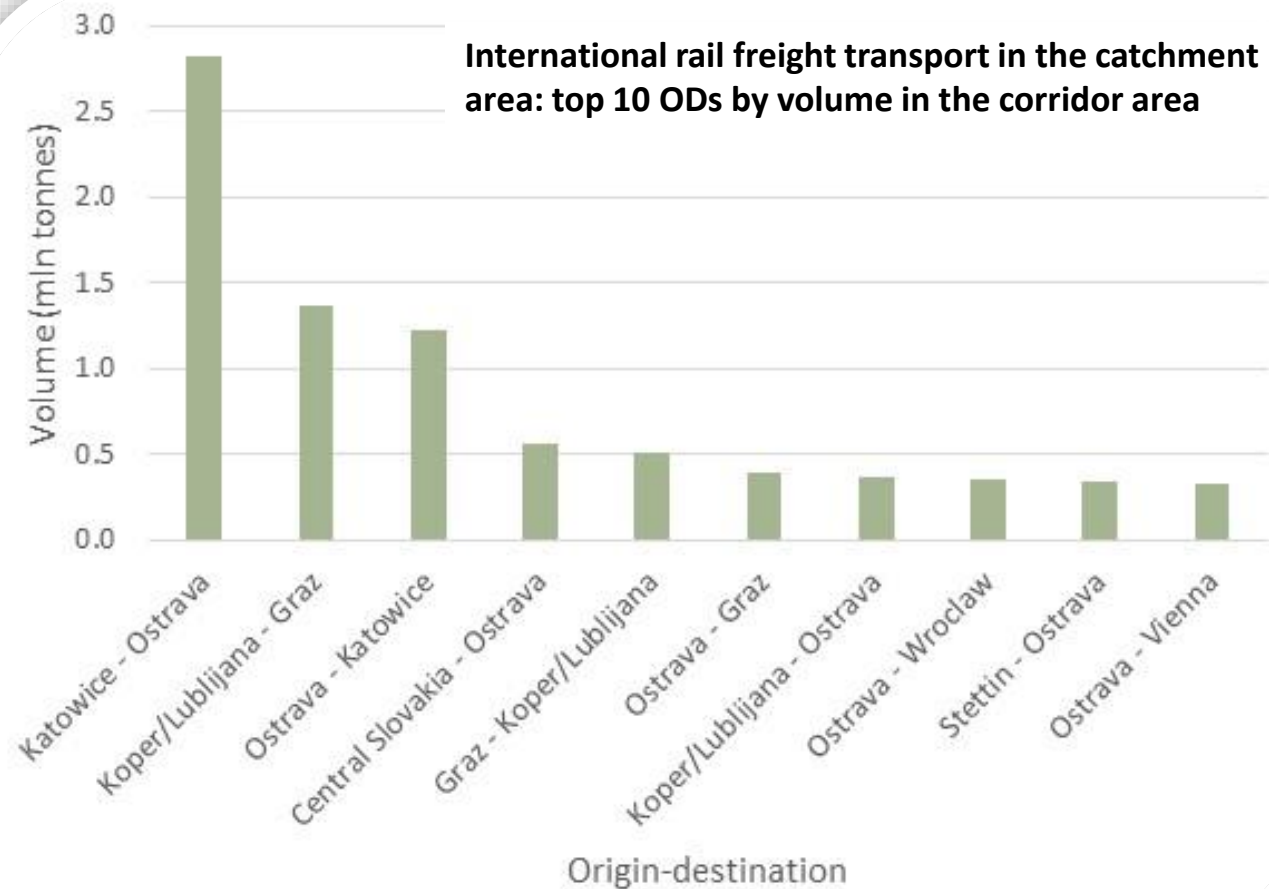
Railway Undertakings using RFCs in 2022

N. trains	RAL P	NSM	SCANME D	AT L	BA	M E D	OE M	NSB	RD	AWB	AMBE R
> 5,000	7	5	6	1	8	2	9	10	9	2	4
> 1,000 < 4,999	18	5	6	6	13	9	24	19	19	1	6
< 1,000	61	23	49	20	96	40	99	79	106	49	66
Total	86	33	61	27	117	51	132	108	134	52	76

International freight transport in the RFC BA catchment area: the modal share 2022 (mln ton)



**RAIL: in the catchment area: 67mln tons
within the Corridor area: ca 25%**



TMS forecasts at 2030: scenarios

❑ **BASE** year: volumes in 2022

❑ **REFERENCE** scenario EU 2020-2050*: macro economic outlook (EU & world GDP) used to forecast international transport in 2030. Road projects included.

❑ **PROJECTS** scenario: adds the impact of main** Rail projects with expected roll-out by 2030

❑ **SENSITIVITY** scenario: adds deployment of TEN-T standards on ETCs by 2030:

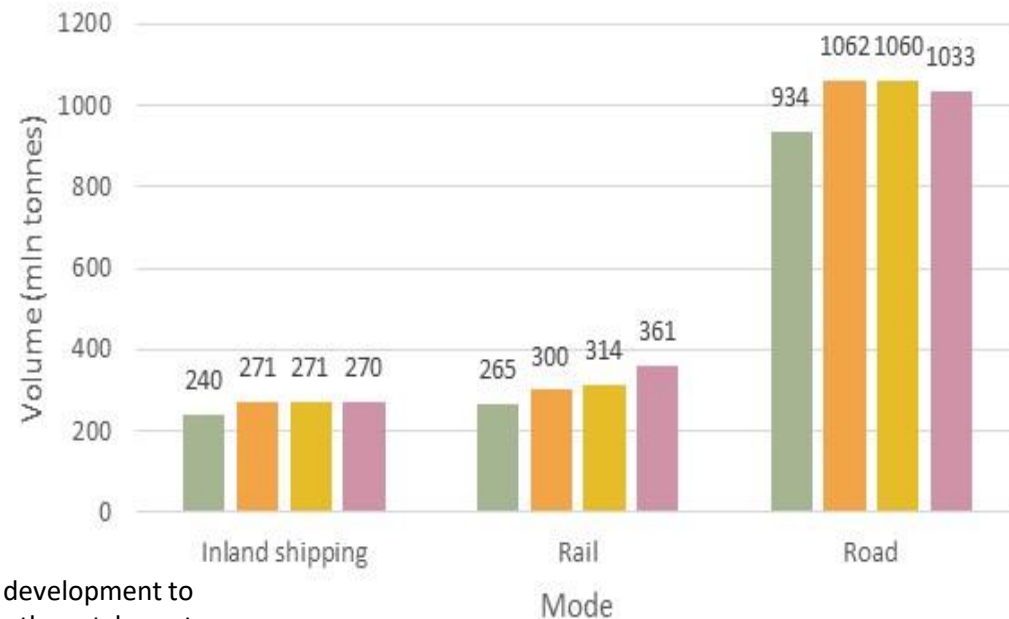
- ❑ 740m-trains
- ❑ ERTMS
- ❑ 22,5t axle load
- ❑ P400 intermodal gauge
- ❑ European track gauge

***RFC BA alignment before extension to ETC BSAS

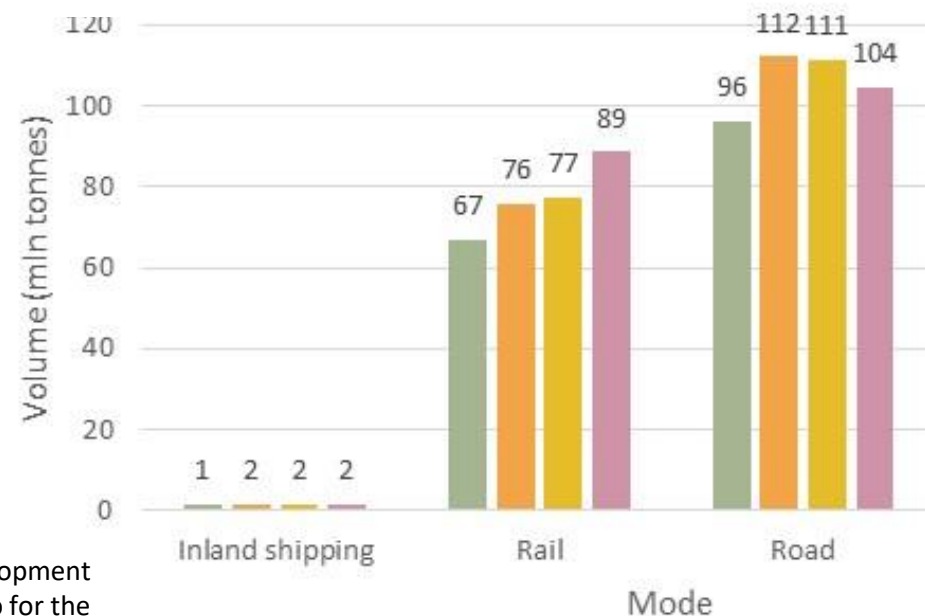
** with a clear impact on costs & travel times reduction

*EU Reference Scenario 2020-2050 (EC,2021) & World Economic Outlook (IMF, 2023)
<https://data.europa.eu/doi/10.2833/35750>

Source: Tplan&Panteia



International freight transport development to 2030 by mode and scenario for the catchment area the network of all 11 RFCs***



International freight transport development to 2030 by mode and scenario for the catchment area of the RFC BA***

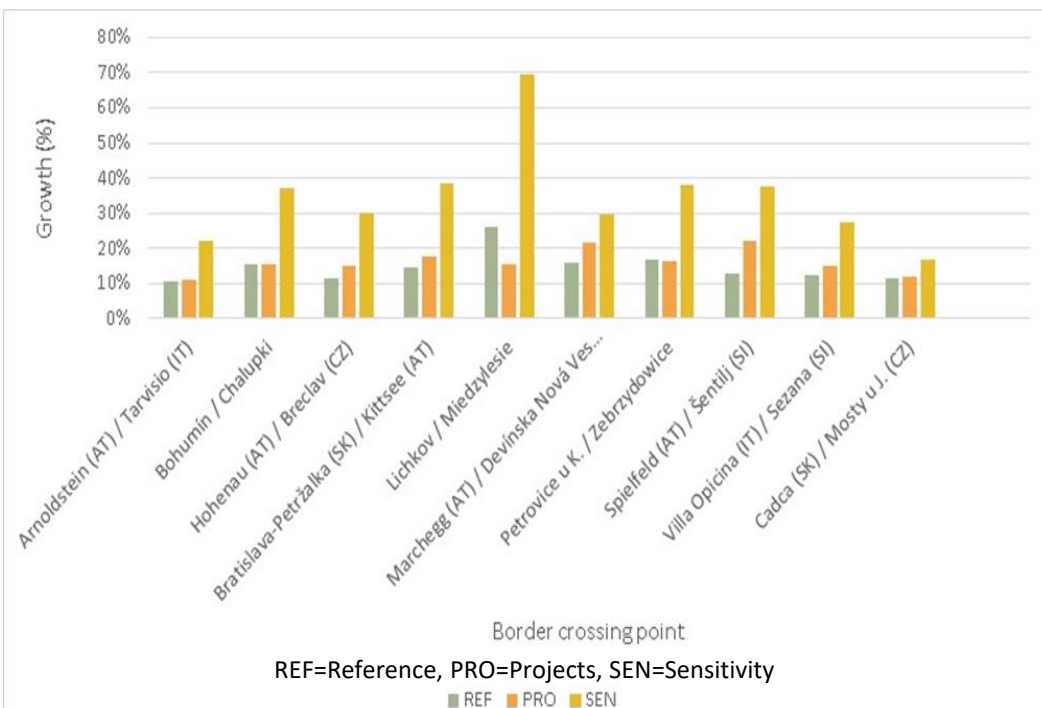
BAS=year 2022, REF=Reference, PRO=Projects, SEN=Sensitivity

■ BAS ■ REF ■ PRO ■ SEN

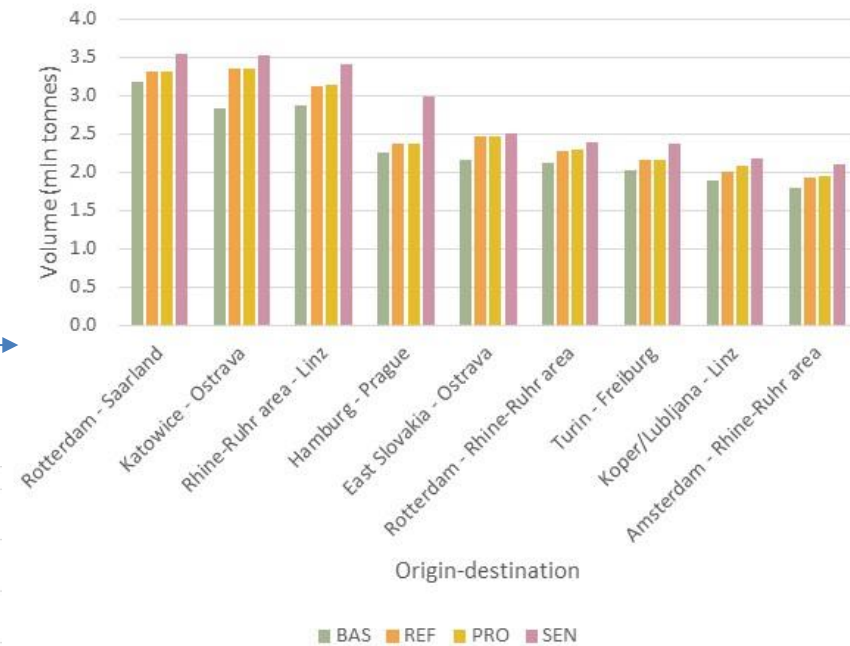
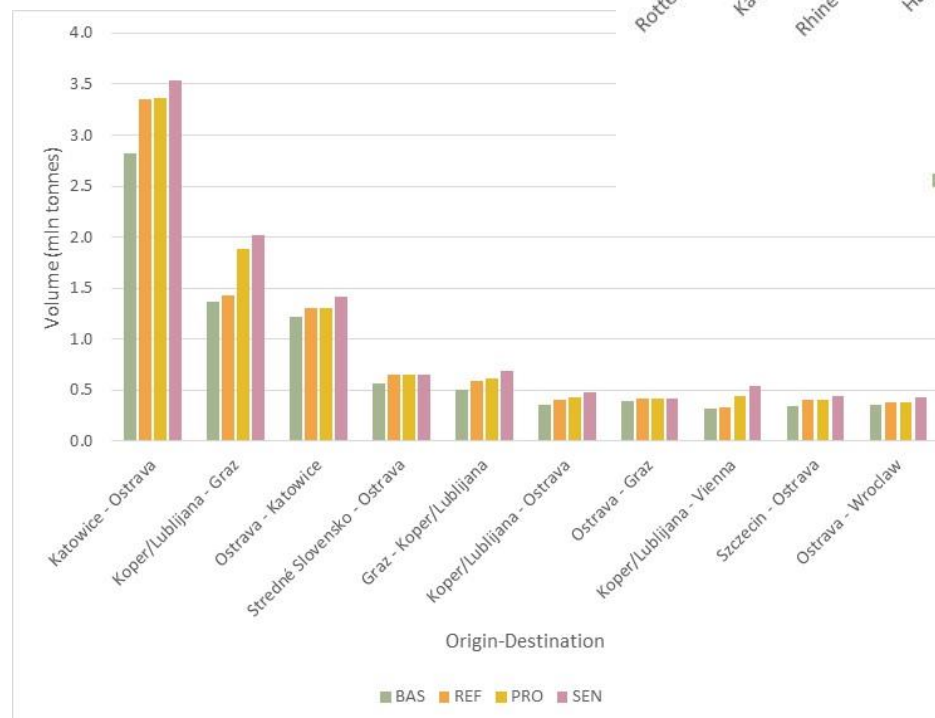
The **sensitivity scenario** shows that an **infrastructure network interoperable at TEN-T standards** could produce a significant **modal shift to rail**:

- **+17% or 13mln ton by rail for the BA Corridor* catchment area**
- **+20% or 61mln ton by rail for the 11 RFCs network catchment area**

Volume growth (%) of international rail freight transport on the border crossing points of the RFC BA



Forecast to 2030 of international rail freight volumes for **top 10 relations** within the 11 RFCs corridor area

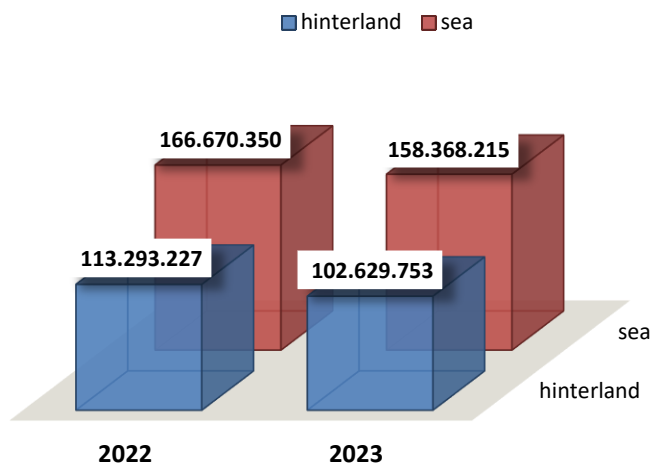


Forecast to 2030 of international rail freight volumes for **top 10 relations** within the RFC BA* corridor area

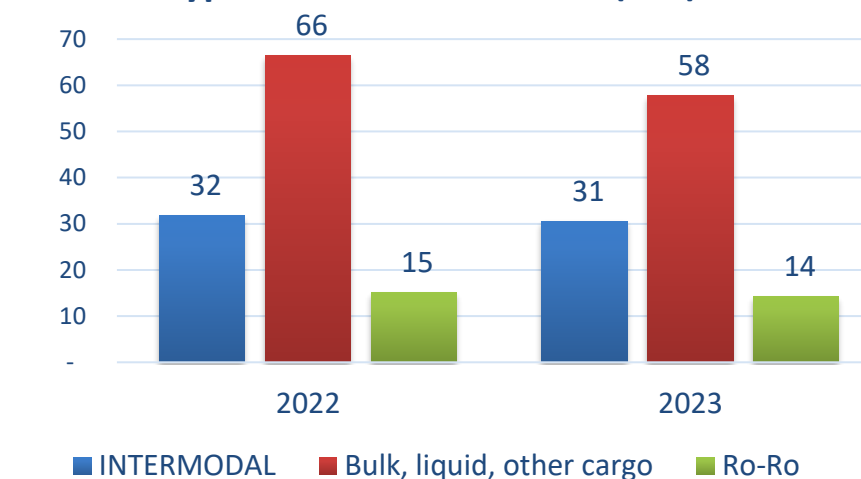
Focus on Adriatic Sea Ports*

*Trieste, Venice, Ravenna, Ancona, Koper, Rijeka

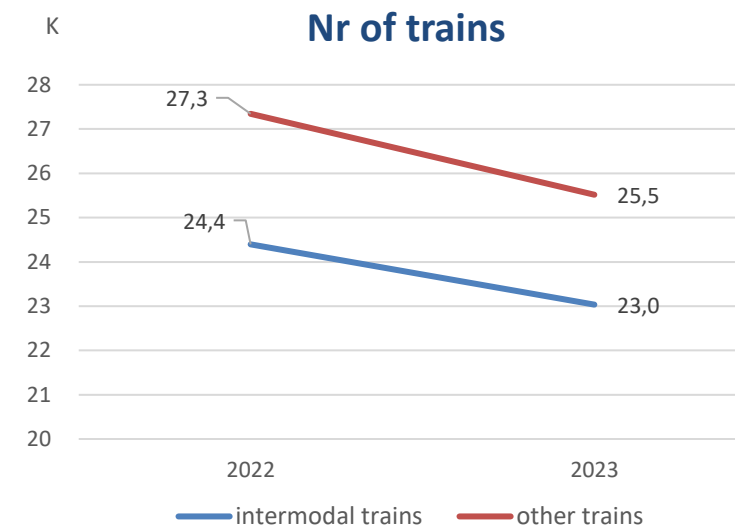
THROUGHPUT (TON)



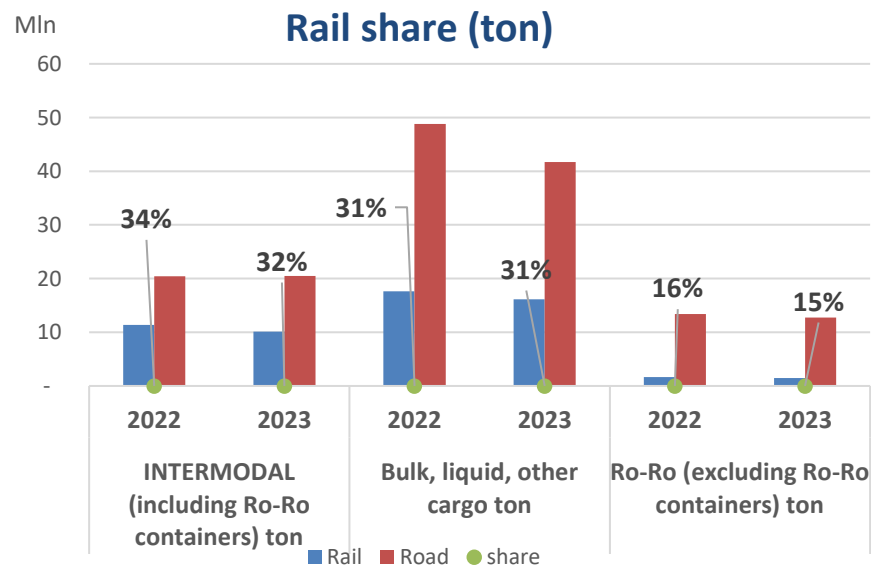
Type of hinterland traffic (ton)



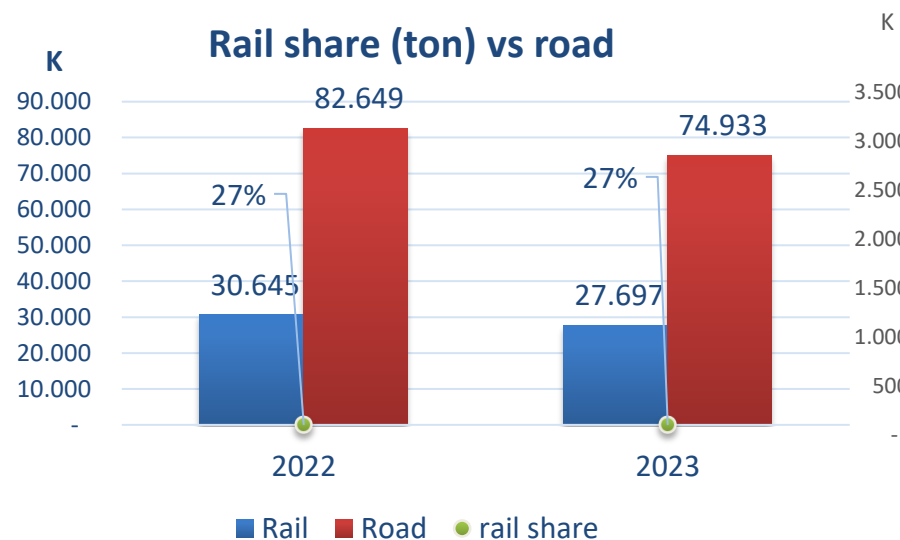
Nr of trains



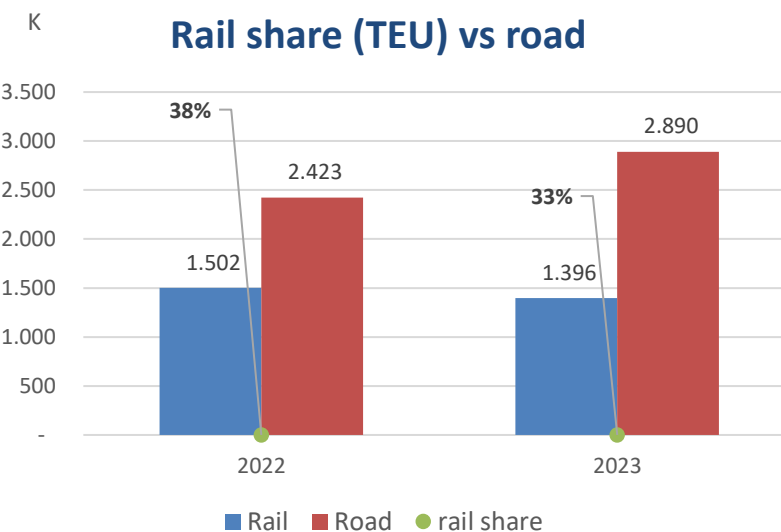
Rail share (ton)



Rail share (ton) vs road



Rail share (TEU) vs road



Focus on Adriatic Sea Ports*

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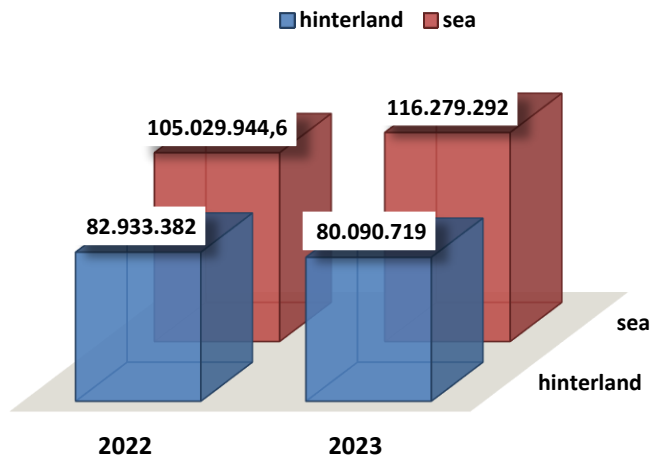
Regarding hinterland flows:

- No significant diversity of modal share inbound vs outbound
- Rail share intermodal is little higher (TEUs) than other goods (tons)
- Different specific situations:
 - @Trieste, Koper, Rijeka: rail volumes almost equivalent to road (long distance trains)
 - @Ravenna, Ancona, Venice: rail share is weak (mainly regional traffic; low draft)
- Little or no rail intermodal @Ravenna, Ancona Venice (bcs of close final destinations&feeder seaflows), Monfalcone (bcs of vocation and access gauge limitations), Bari (bcs no rail connection)
- Avg nr of TEUs per train is 61

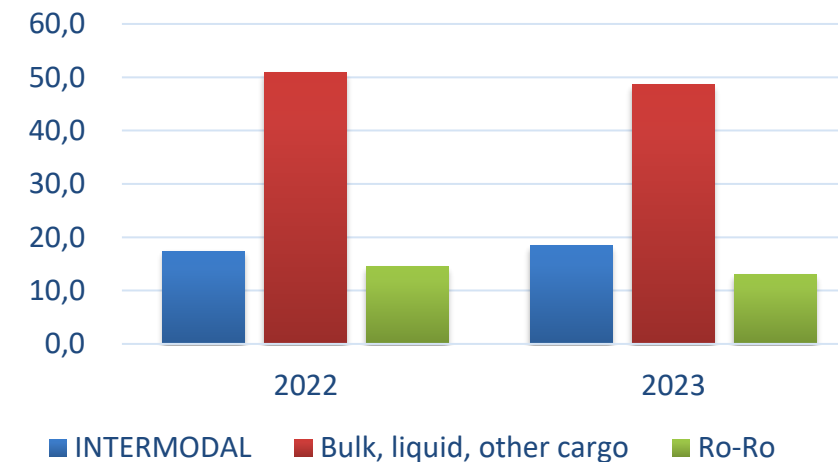
Focus on Baltic Sea Ports*

*in progress: Szczecin, Swinoujscie, Gdansk

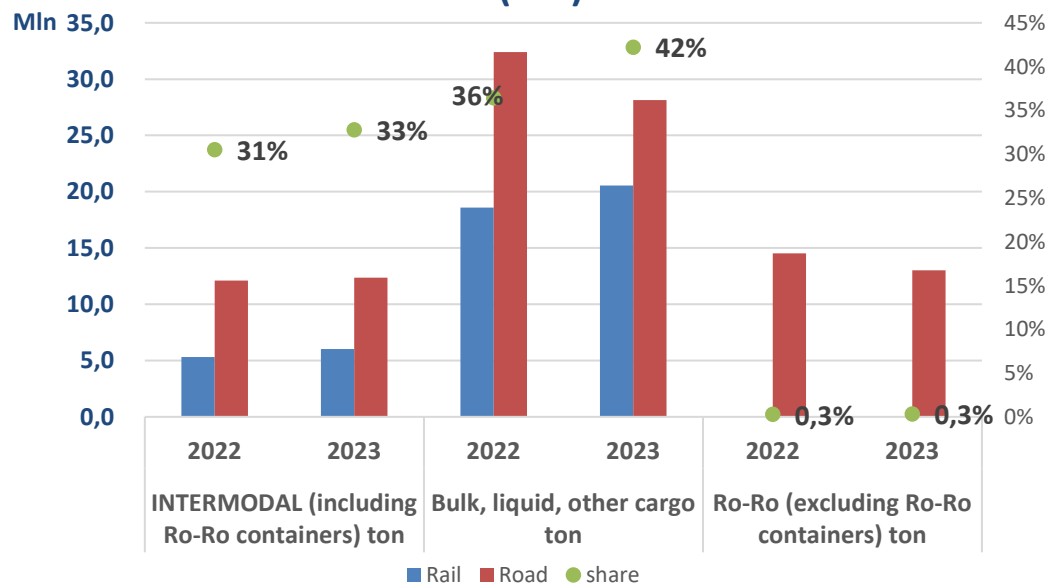
THROUGHPUT (TON)



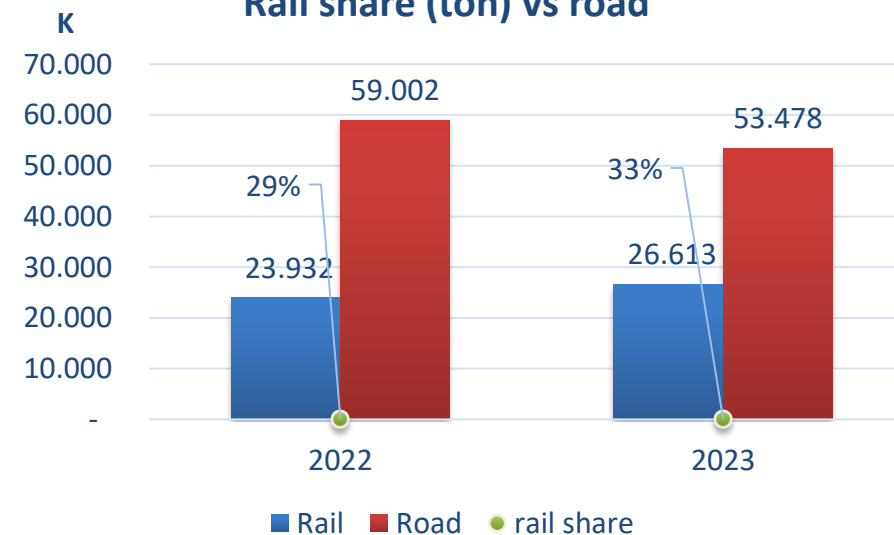
Mln Type of hinterland traffic (ton)



Rail share (ton) vs road



Rail share (ton) vs road



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Consultation of the project list

The purpose of this consultation is to ensure that the investments resulting from rail freight traffic are included in the project list; and involve the representatives of the freight market such as the RAG and TAG in the process at the basis of the elaboration of the corridor work plans and implementation plans.

The list has been compiled in close cooperation with the rail infrastructure managers and terminal operators

Further to **comments regarding the exhaustiveness of the list** to develop a high-quality infrastructure and compliant corridor by 2030 (core lines) and 2040 (extended core lines), the Rail Freight Governance may also provide **considerations on specific infrastructure investments to prioritise according to market needs.**

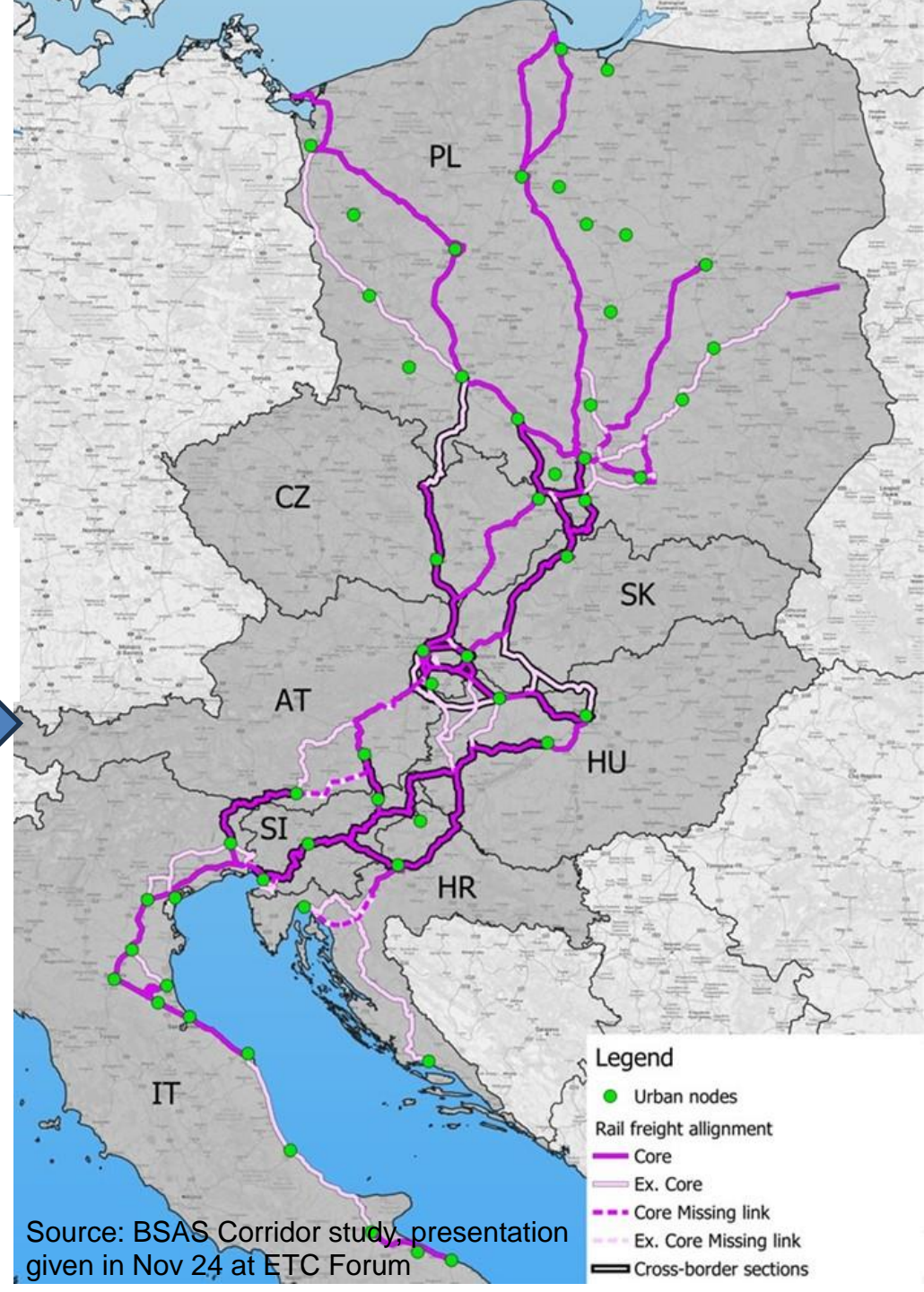
The conclusions of such consultations should be provided to the European Coordinator in early May 2025 and should be combined with a qualitative assessment note from the Rail Freight Governance, to be considered for the elaboration of the Work Plan by the European Coordinator

The new RFC BSAS routing

(the dotted lines represent the extensions of RFC BA)



Core and
extended core
lines



Source: BSAS Corridor study, presentation given in Nov 24 at ETC Forum

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Objectives&measures

Targets of performance set by ExBo in the IP and historical performance

Area	Indicator	Metric	Targets for IP	Performance			
				2022	2023	2024	2025
Capacity	Capacity Requests rate	Km*days requested / Km*days offered (%)	30%	33%	36%	33%	45%
	Fulfilment of customers' wishes	Rate of offered PaPs/wished by customers	80%	83%	93%	70%	75%
Operations	Punctuality at RFC entry	RNE TPM yearly KPI report	max Delta (Orig-Dest%) : 16%	50%	43%	46%	42%
	Punctuality at RFC exit	RNE TPM yearly KPI report		34%	31%	34%	30%
	Punctuality at destination (real)	art 19 Regulation	>=75%			31%	34%
	Dwell time at borders	art 19 Regulation	<=25min				
	long trains	art 19 Regulation	as of art 19				
Premium Products Offer	Quantity of Premium offer	Number of premium PaPs offered	6	6	6	8	10
	Premium Offer: market response	Premium PaPs booked / Premium PaP offered (%)	no target	33%	33%	25%	60%

Objectives&measures

Border	Average planned dwell [min.]	Average real (clean) dwell [min.]
Bernhardsthal - Břeclav os.n.	122	149
Chałupki - Bohumín os.n.	36	10
Chałupki - Bohumín-Vrbice	75	44
Kittsee - Bratislava-Petržalka	56	99
Marchegg - Devínska Nová Ves	28	133
Międzyzlesie - Lichkov	61	31
Mosty u Jablunkova - Čadca	54	58
Spielfeld-Straß - Šentilj	28	35
Thörl-Maglern - Tarvisio Boscover	48	72
Villa Opicina - Sežana	64	134
Zebrzydowice - Petrovice u Karvine	161	229

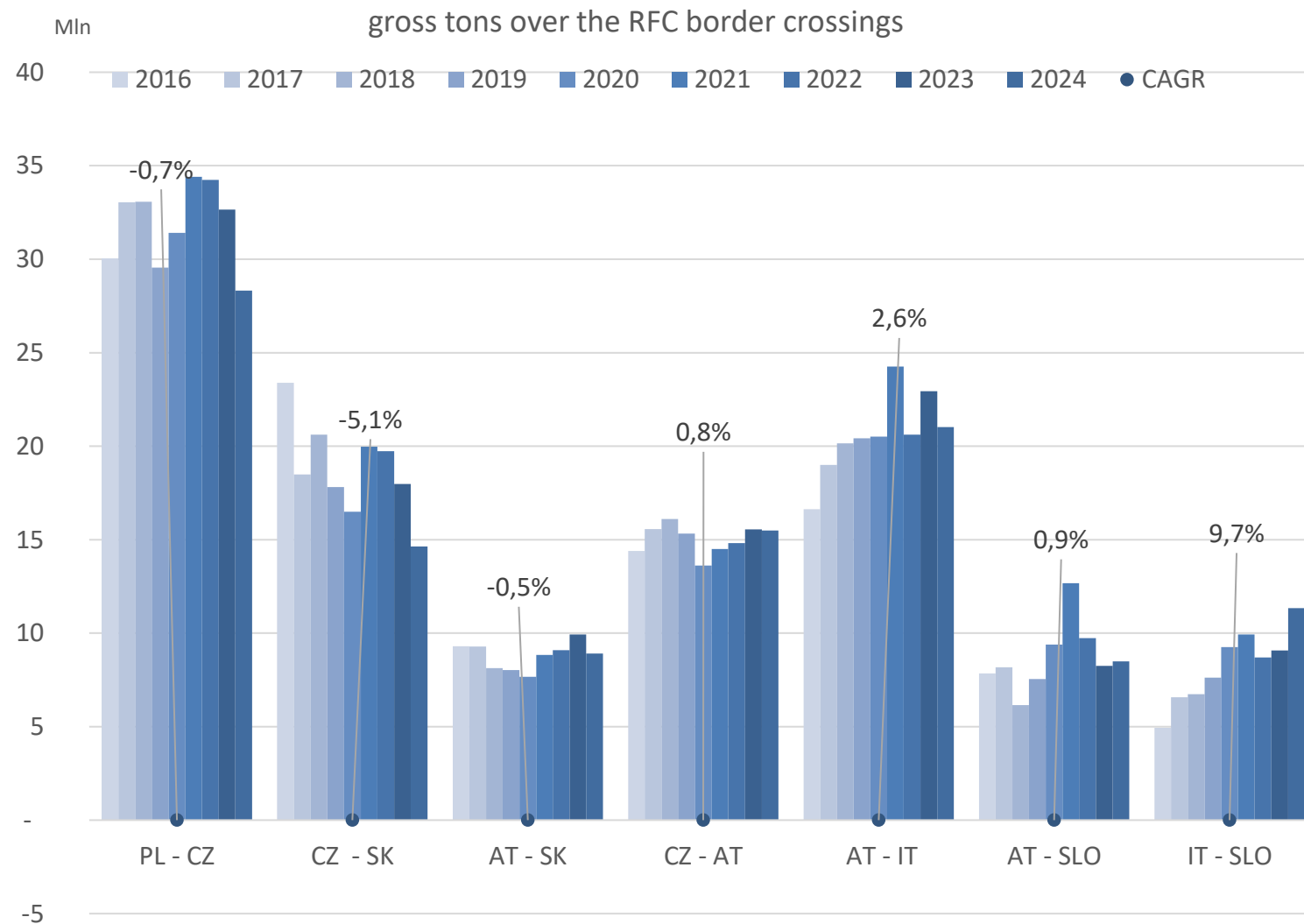


Gross tonnes over the RFC border crossings

Trend freight

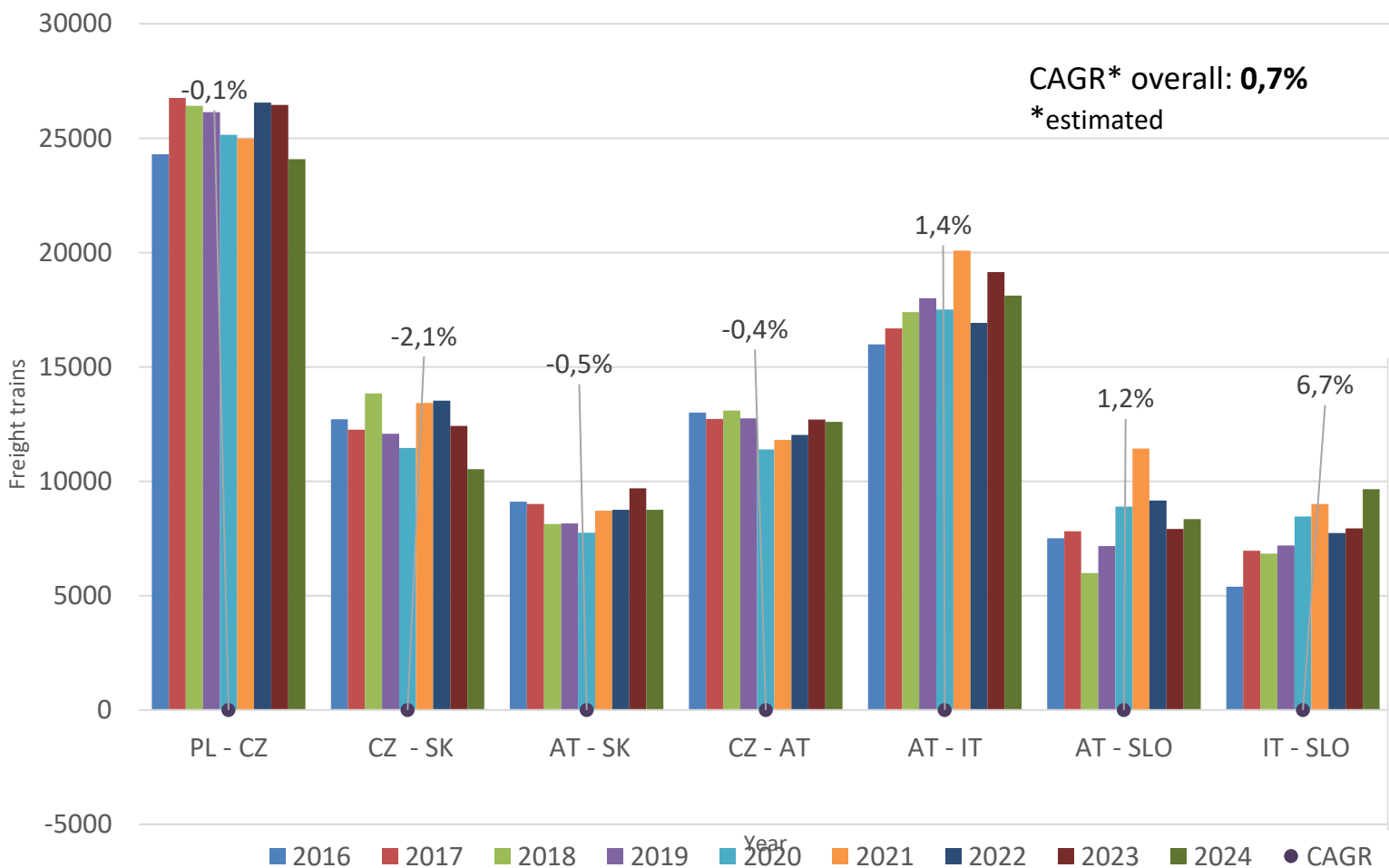
CAGR* overall: 1,0%

*estimated

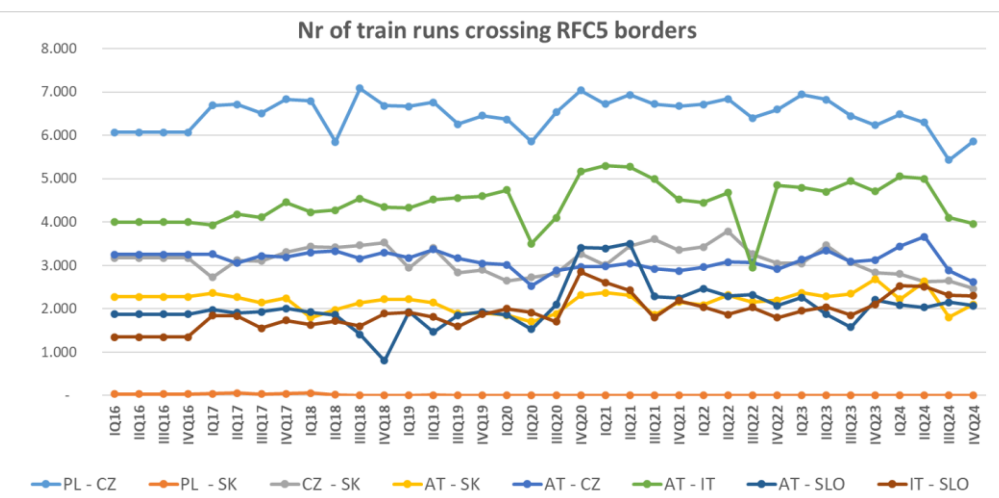
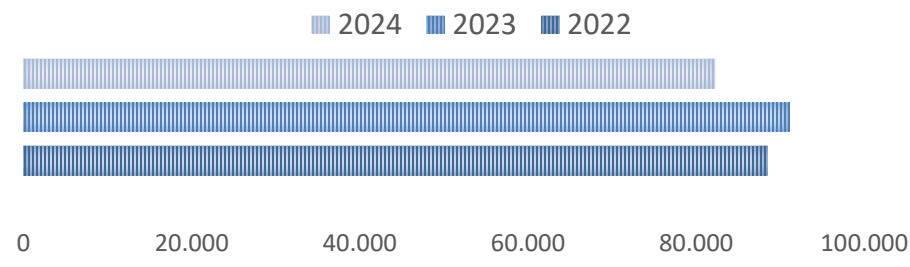


Number of freight train runs crossing the RFC borders

trend since the RFC has been operational



Nr of overall trains crossing at least a border of RFC BA



Source: RFC5 IMs

Views and expectations of RAG/TAG

Performance & measures topic

Opinions of the Advisory Groups on the process and the results of performance monitoring as well as on the measures taken to achieve the corridor's objectives.

POSSIBLE STRUCTURE/WORK IN PROGRESS FOR QCOs

- DWELL TIME:
 - Active role of RFC BA:
 - Tarvisio
 - ???
 - Observing role when already set-up by other overlapping RFCs
 - Villa Opicina: RFC MED
 - ???
- PUNCTUALITY:
 - Call for terminals+RUs volunteers to set up WGs