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Marketing Evolution

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We increase the impact of marketing measures and enhance our customers' brand value. In order to achieve this goal we combine market research and consulting to create a tailor-made solution.





RFC User Satisfaction Survey 2017

Report for RFC 8



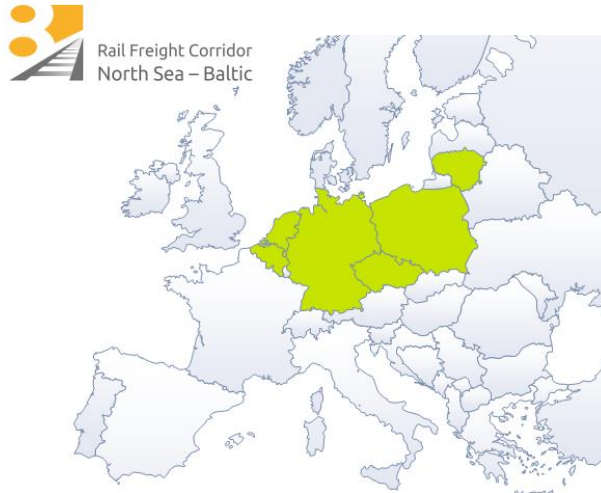
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November 2017

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1 Study Design

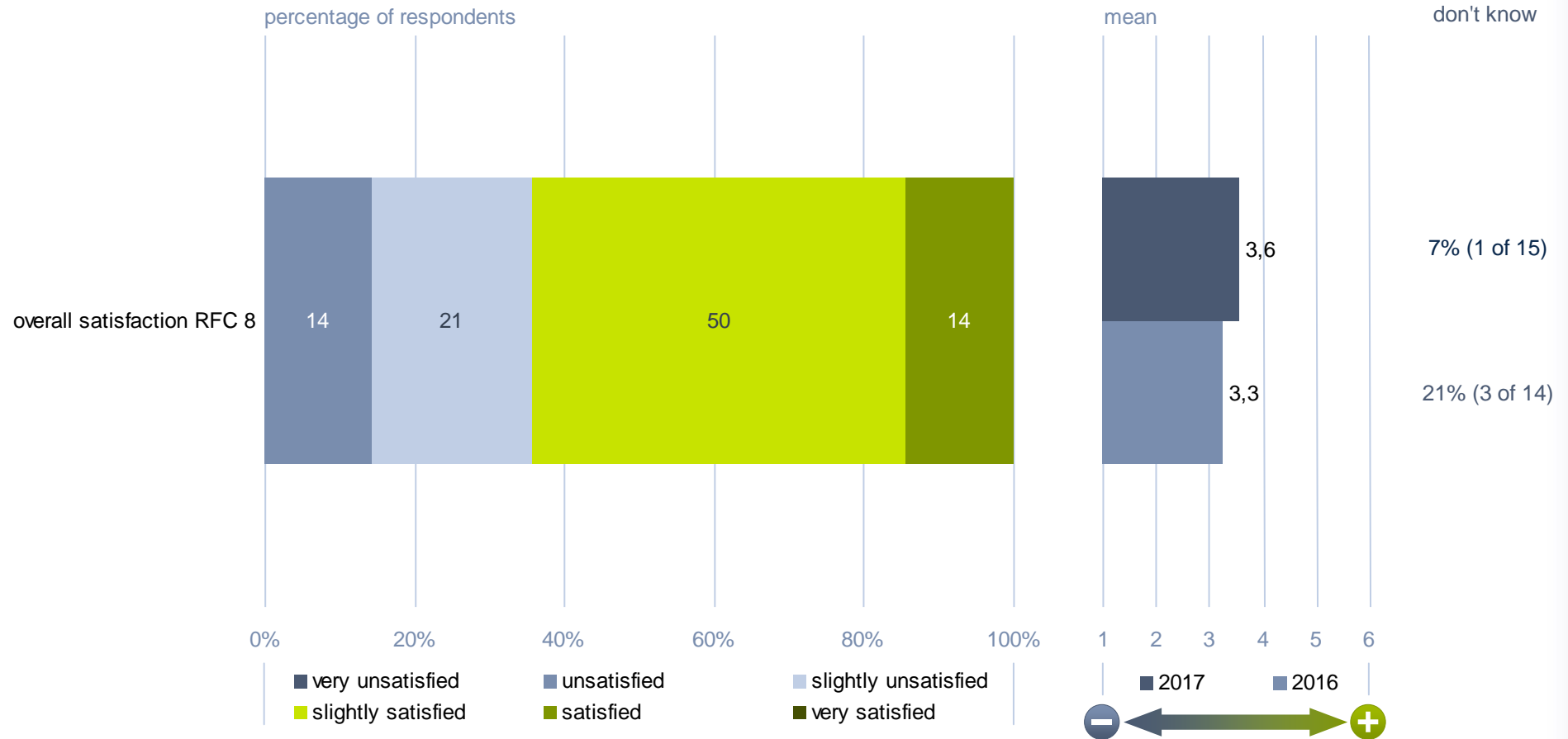


- ▶ **15 respondents**
 - 15 RFC8 users / 0 non-users
 - 14 full interviews / 1 partial interviews
 - 11 nominated by RFC8 / 4 nominated by other RFCs
 - 6 agreed to forward name/company
 - 3 used topic-forward
- ▶ Computer Aided Web Interviews (CAWI)
- ▶ Contacts (e-mail address) delivered by RFCs
- ▶ 44 e-mail invitations sent
- ▶ Field Phase: 12 September to 18 October 2017

Attention: very small sample sizes!



2 Satisfaction with the RFC

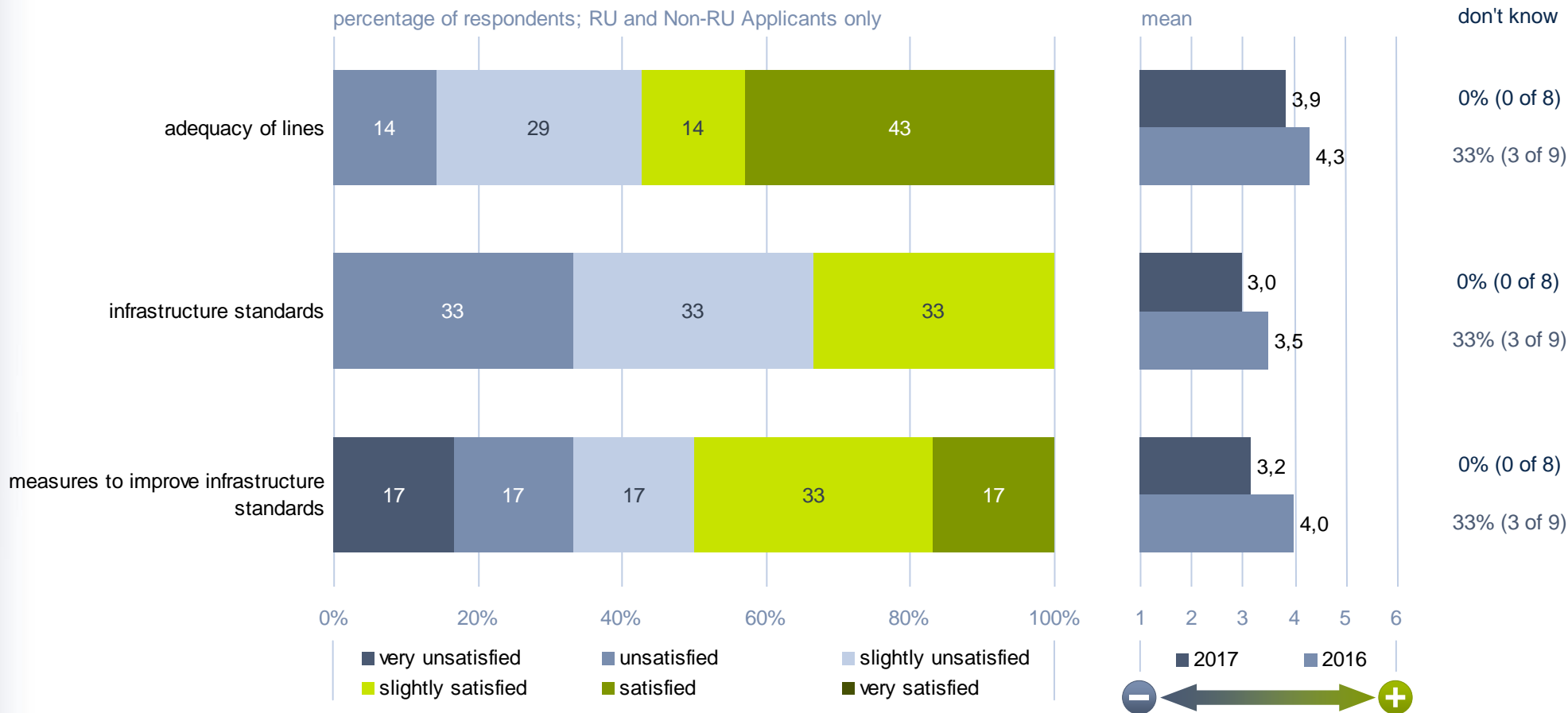


"Overall, how satisfied are you in general as a user of the RFC(s)?"

n = 15; 14

- connections with other RFC to be clarified and aligned
- focus more on maritime flows going to or from deep sea terminals
- be a leader in coordinating construction sites
- planning of TTR to be aligned with users and market demand
- questions about the communication with the executive board is missing
- split RAG from TAG meetings
- cancellation conditions in Poland are a negative factor for PaP-ordering
- be an enabler by providing data to bundle maritime flows.
- foresee reduction of Infra costs in case of long term quality disturbance due to Infra works
- improvement and harmonization of processes along the corridor (cross-border and not only within member states)
- reduce restrictions for border crossings (requirements for language, engines)
- temporary restrictions to be aligned with market demands
- the RFC should have a budget for "small" investments with big impact
- cooperation with other corridors to avoid disharmonized operational rules
- development of one harmonized TCM
- more rapid deployment of investment at cross border level (incl. ERTMS, coord. works, long trains etc...)
- take the lead in aligning ERTMS deployment between IM
- development of a harmonized and concerted ERTMS-migration strategy along the corridor; taking into account the RU-migration (loco investments)
- take the lead in aligning completion of missing links / eliminating bottlenecks
- taking care for disturbances, whatever it takes

"If there are any other opinions/suggestions/expectations (either concerning the state of play or the future development of the RFC) that you would like to share with us, please describe them below."



"To what extent are you satisfied with the adequacy of the lines assigned to the RFC? || ... with the infrastructure standards of all designated lines, including diversionary routes dedicated to the RFC, concerning parameters such as train length, axle load, electrification, loading gauges, etc.? || ... with the measures taken by the RFCs' Infrastructure Managers to improve the infrastructure standards on the lines assigned to the RFC?"

- gauge harmonization
- harmonization of train length & weight
- non-coordination of international construction sites
- in case of unavailable path because of works - no offer of diversionary lines
- no activities to unify ETCS
- bad or insufficient register management
- not clear who is responsible for the measurements

"If you are 'unsatisfied' or 'very unsatisfied' with any of the topics in this chapter, 'Infrastructure', please specify the main reasons and your proposals and ideas for further improvement."



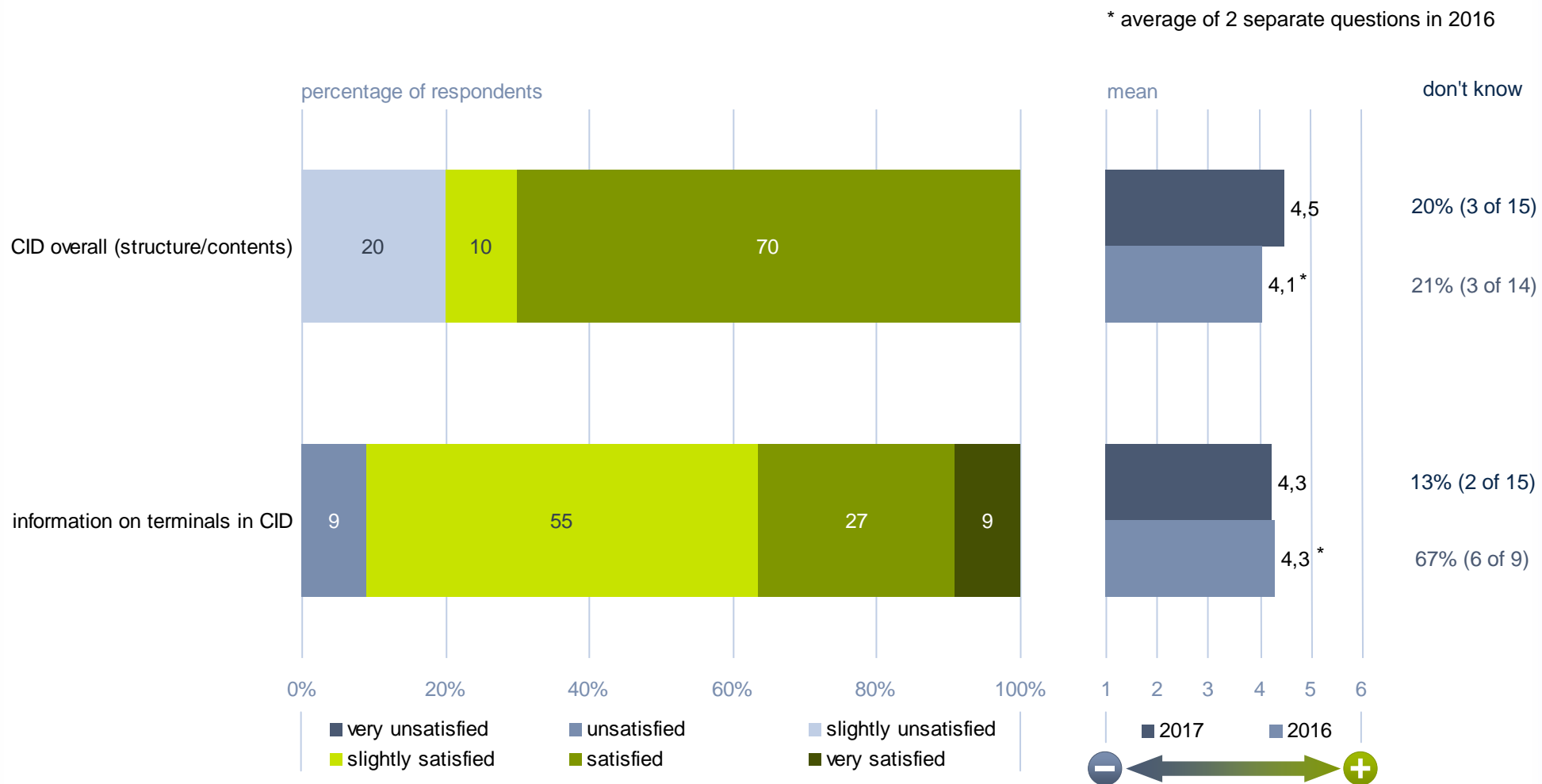
Reasons for dissatisfaction with Coordination of Works & Possessions ||

open question

- coordination between the IB only partially available
- no reliable information
- non-coordination of international construction sites
- no activities to unify ETCS
- the official RNE process is not "lived" (new Annex 7)
- introduce the TCR process

"If you are 'unsatisfied' or 'very unsatisfied' with any of the topics in this chapter, 'Coordination and communication of planned temporary capacity restrictions', please specify the main reasons and your proposals and ideas for further improvement."

Satisfaction with Corridor Information Document (CID)

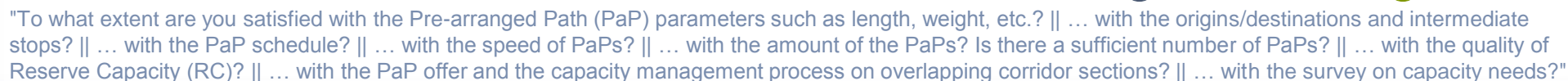


"To what extent are you satisfied with the Corridor Information Document (CID) for the 2018 timetable year? (Can you easily find all the information you are looking for and is it structured in a logical way? Do the contents match your business needs? Is the level of detail sufficient?) || To what extent are you satisfied with the supply of information on terminals? (Are all relevant pieces of information on terminals included in the CID 2018 or in other sources, e.g. CIP?)"

Reasons for dissatisfaction with Corridor Information Document (CID) || open question

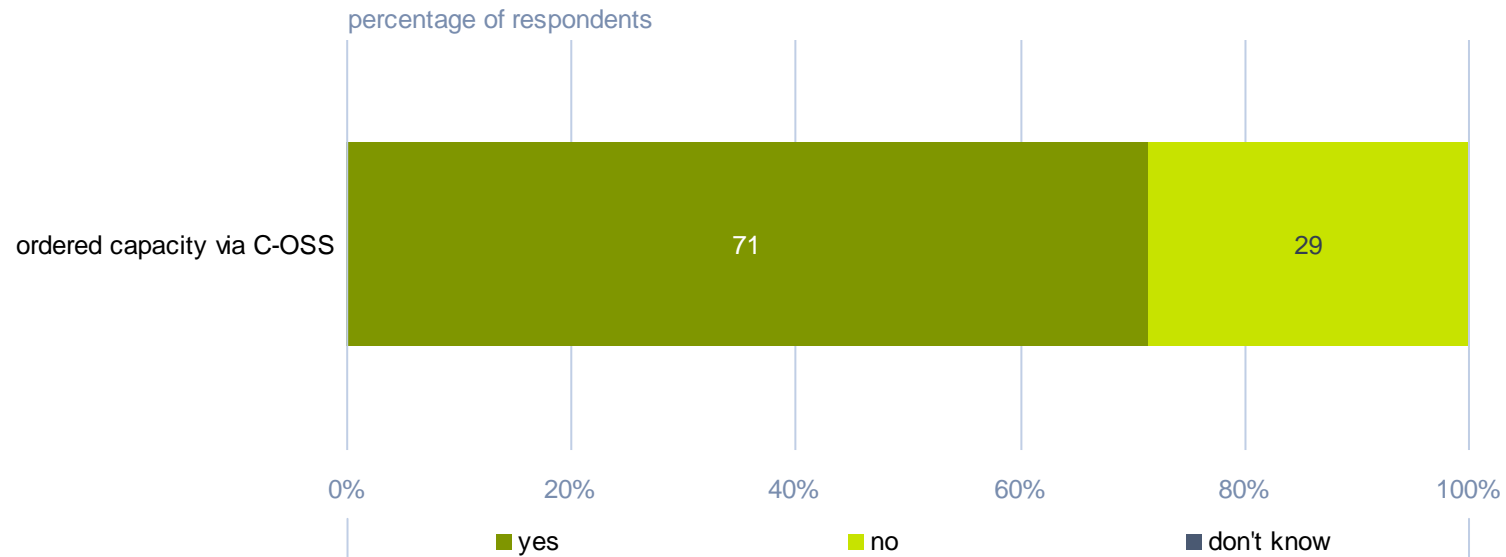
-no terminal information

"If you are 'unsatisfied' or 'very unsatisfied' with any of the topics in this chapter, 'Corridor Information Document', please specify the main reasons and your proposals and ideas for further improvement."





"How satisfied are you with the FlexPAP concept? || How satisfied are you with the Net-PaP concept to influence / improve the priority value of your PaP request in case of conflicts?"



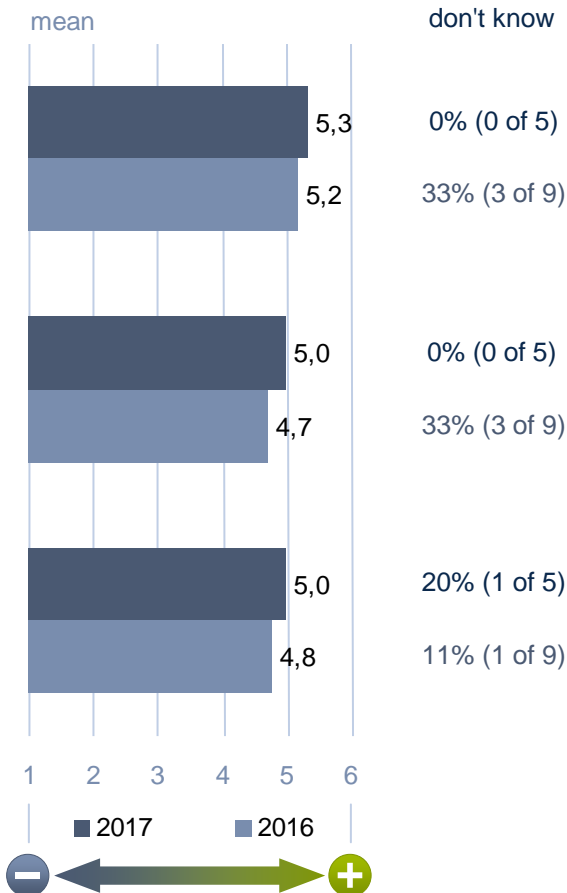
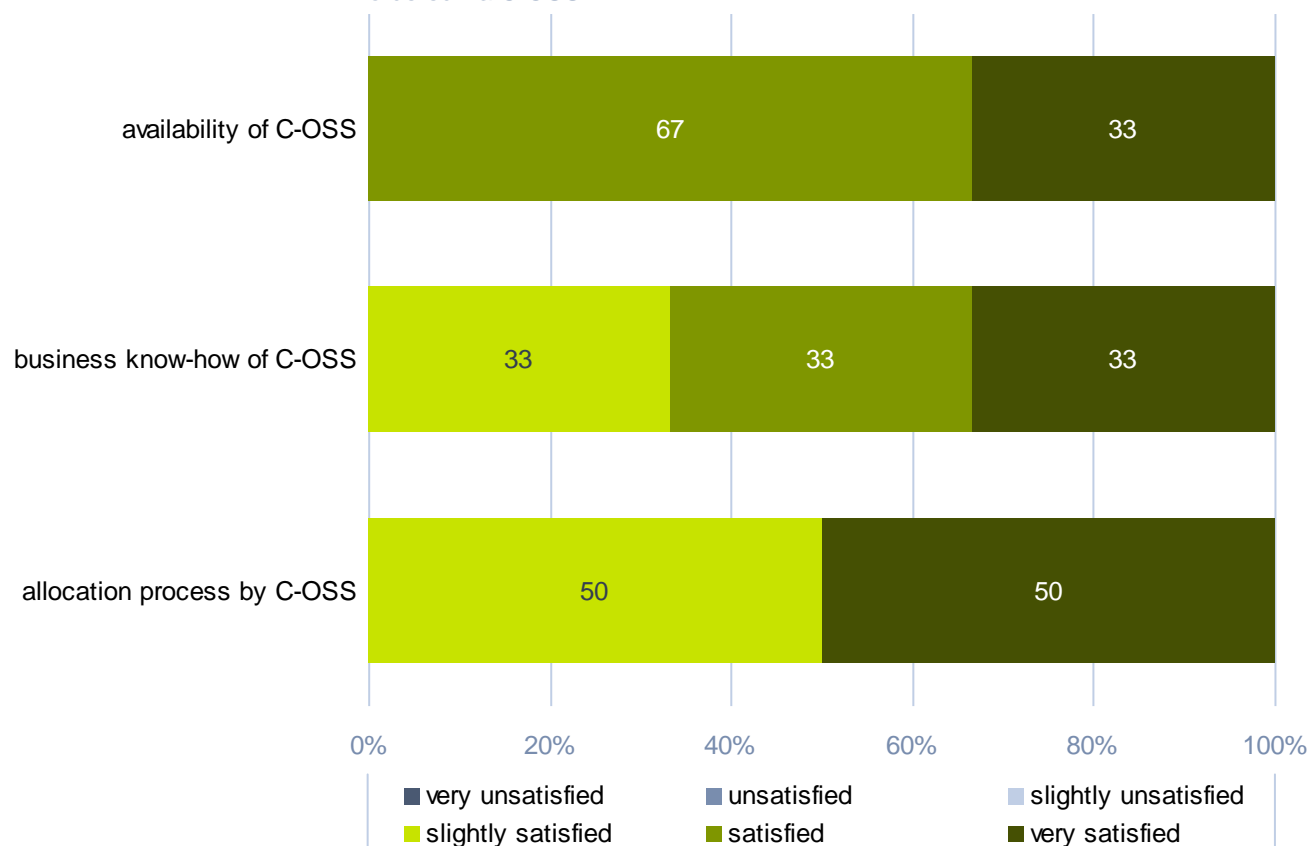
Reasons for non-usage:

- due to cancellation conditions in Poland
- none of the offered PaPs met our requirements

"Did you order capacity via the C-OSS? || What are the reasons you did not order capacity via the C-OSS?"

n = 15

percentage of respondents; RU and Non-RU Applicants only,
ordered via C-OSS

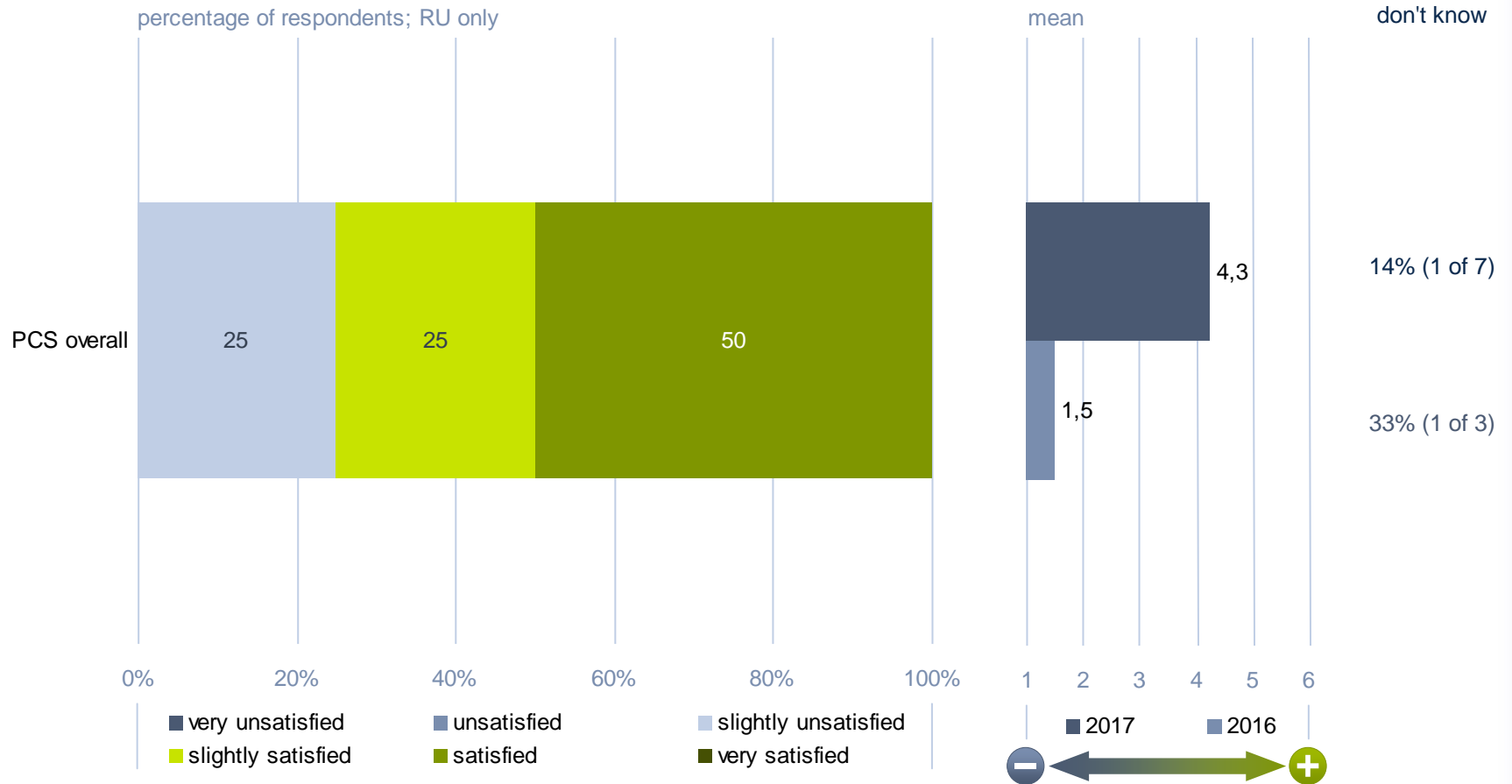


"How satisfied are you with the availability of the Corridor One-Stop Shop (C-OSS)? (Is the reaction time of the C-OSS adequate?) || How satisfied are you with the business know-how of the C-OSS? || How satisfied are you with the allocation process for the 2018 timetable year? (Please consider especially the pre-allocation by the C-OSS, and the delivery of the draft and final offers.) || How satisfied are you with the conflict-solving procedure?"

Reasons for dissatisfaction with Path offer, PaP allocation and C-OSS || open question

-reserve capacity does not work

"If you are 'unsatisfied' or 'very unsatisfied' with any of the topics in this chapter, 'Path offer, PaP allocation process and C-OSS', please specify the main reasons and your proposals and ideas for further improvement."



"How satisfied are you all in all with PCS as a booking tool for international path requests? Does it match your needs?"

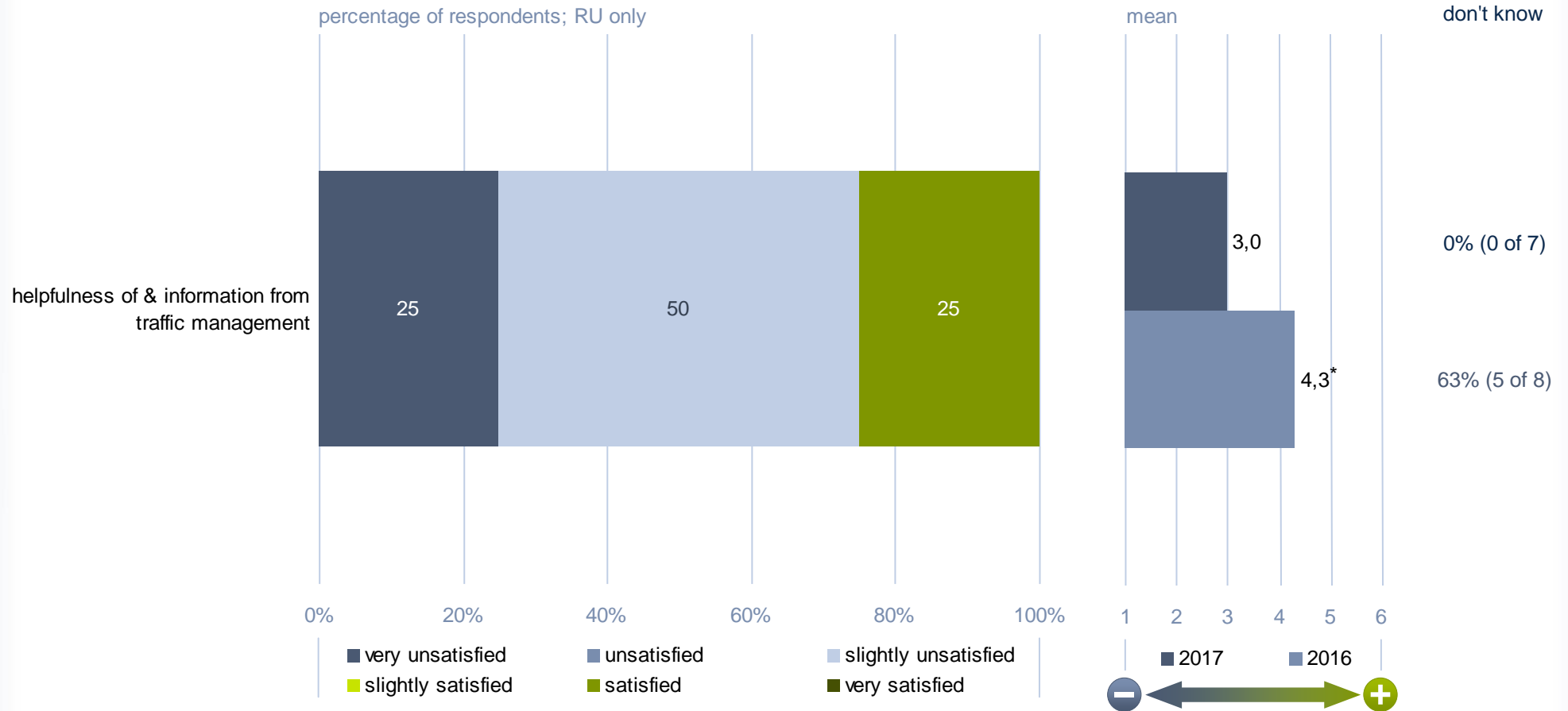
n = 7; 3

Reasons for dissatisfaction with Train Performance Management || open question

- no or not detailed information with clear measures how to improve quality
- no noticeable influence of the corridor on the respective IB

"If you are 'unsatisfied' or 'very unsatisfied' with any of the topics in this chapter, 'Train Performance Management', please specify the main reasons and your proposals and ideas for further improvement."

* average of 3 separate questions in 2016

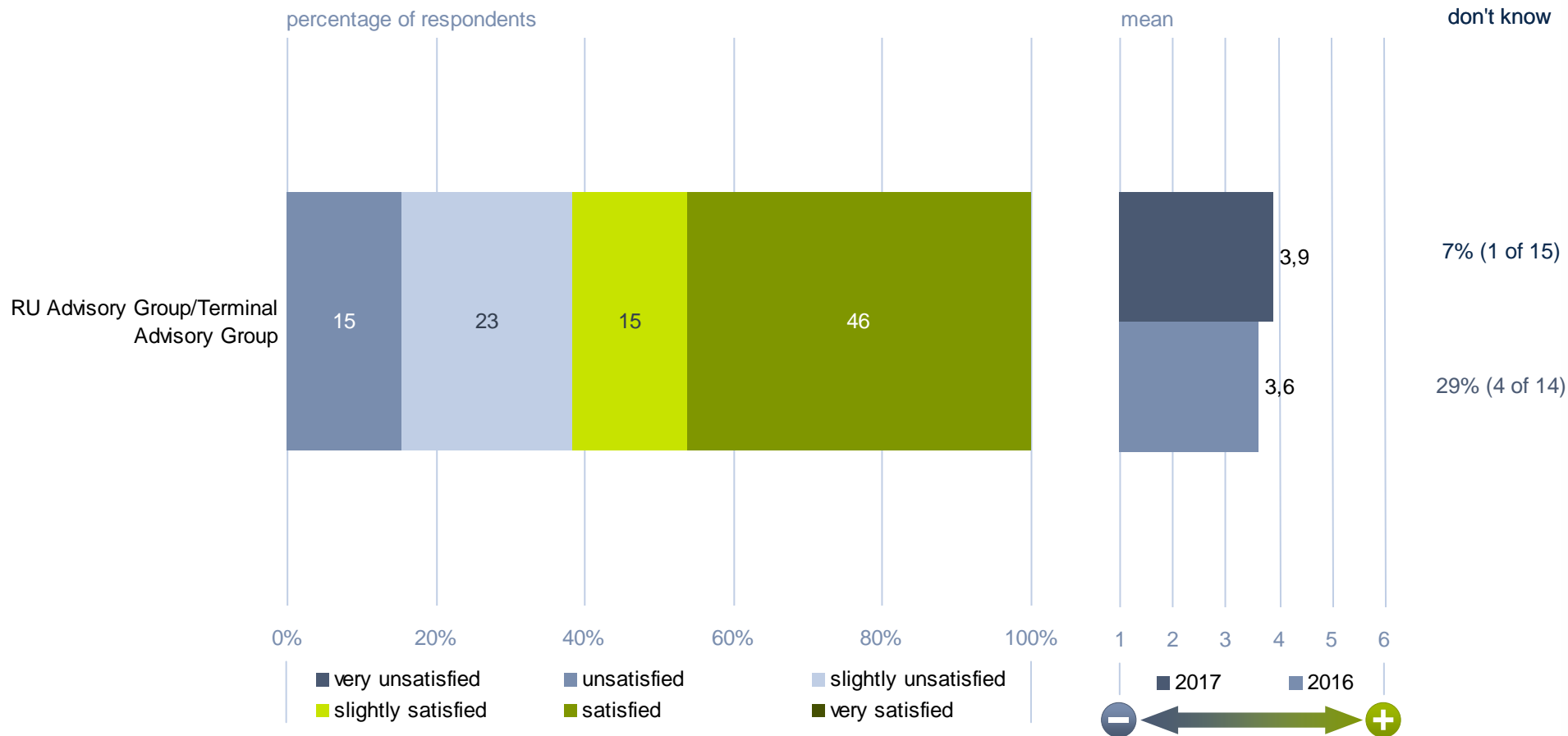


"How satisfied are you with the helpfulness of the Infrastructure Managers' traffic management on the RFC (as regards running your trains with a high service quality) and with the information you receive from them?"

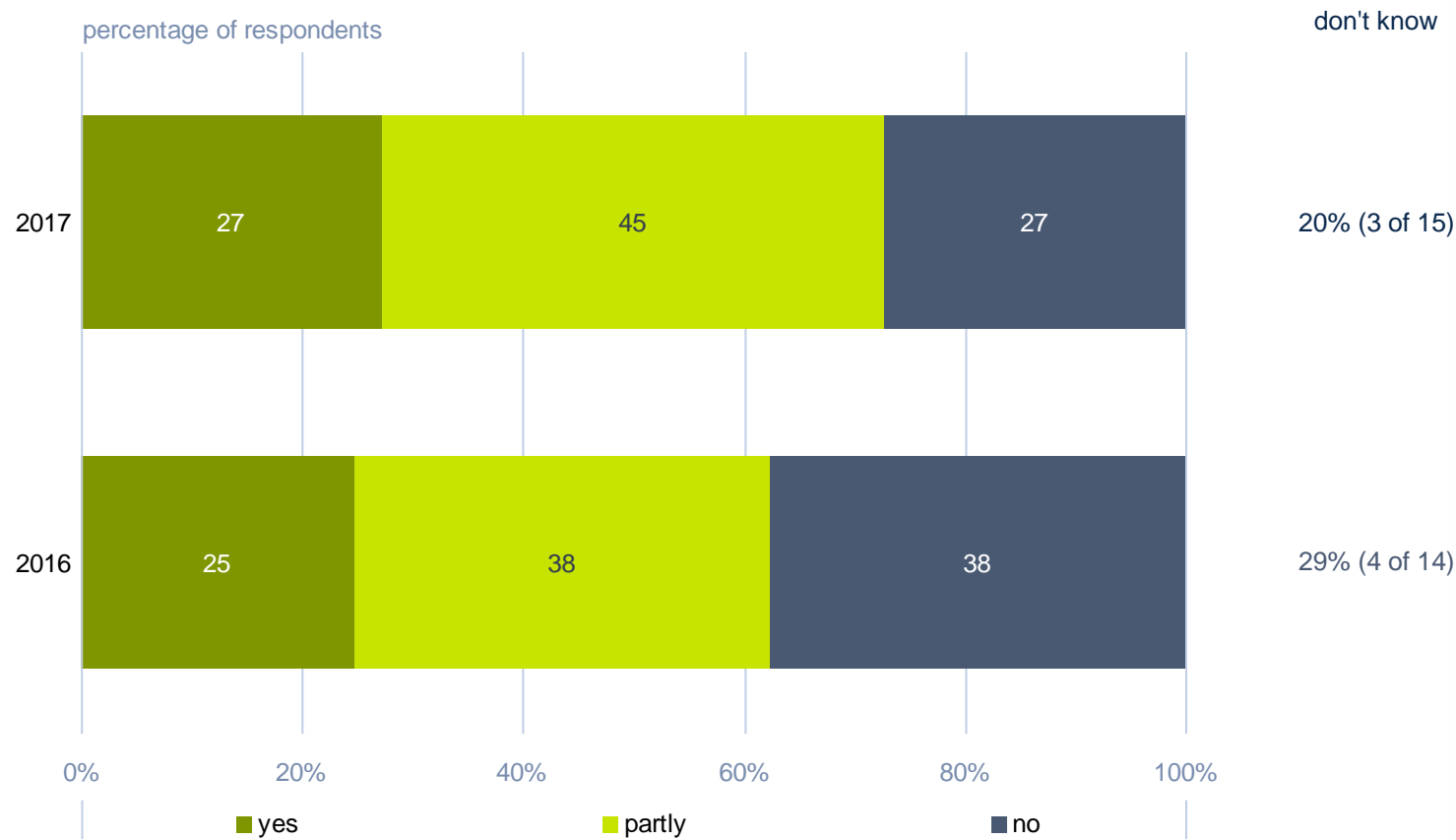
n = 7; 8

-not visible impact at all

"If you are 'unsatisfied' or 'very unsatisfied' with the topic in this chapter, 'Traffic Management', please specify the main reasons and your proposals and ideas for further improvement."



""How satisfied are you with the RU Advisory Group/Terminal Advisory Group (RAG/TAG) meetings. Is your attendance beneficial and useful for your company? (Is your attendance beneficial and useful for your company?)"



"Do you consider that the opinion of the Advisory Group has been properly taken into account by the RFC Management Board?"

- combination of RAG and TAG does not work well for TAG members
- difficult to understand the governance of the RFC8 - customer does not seem the main driver of the decisions (eastern part)
- problems are only partially addressed; at the same time, no real solutions are offered for problems raised
- the level of involvement of the TAG is lower as compared to the TAG's of the other corridors
- the organization of the TAG's with only short notice invitations, information on location...

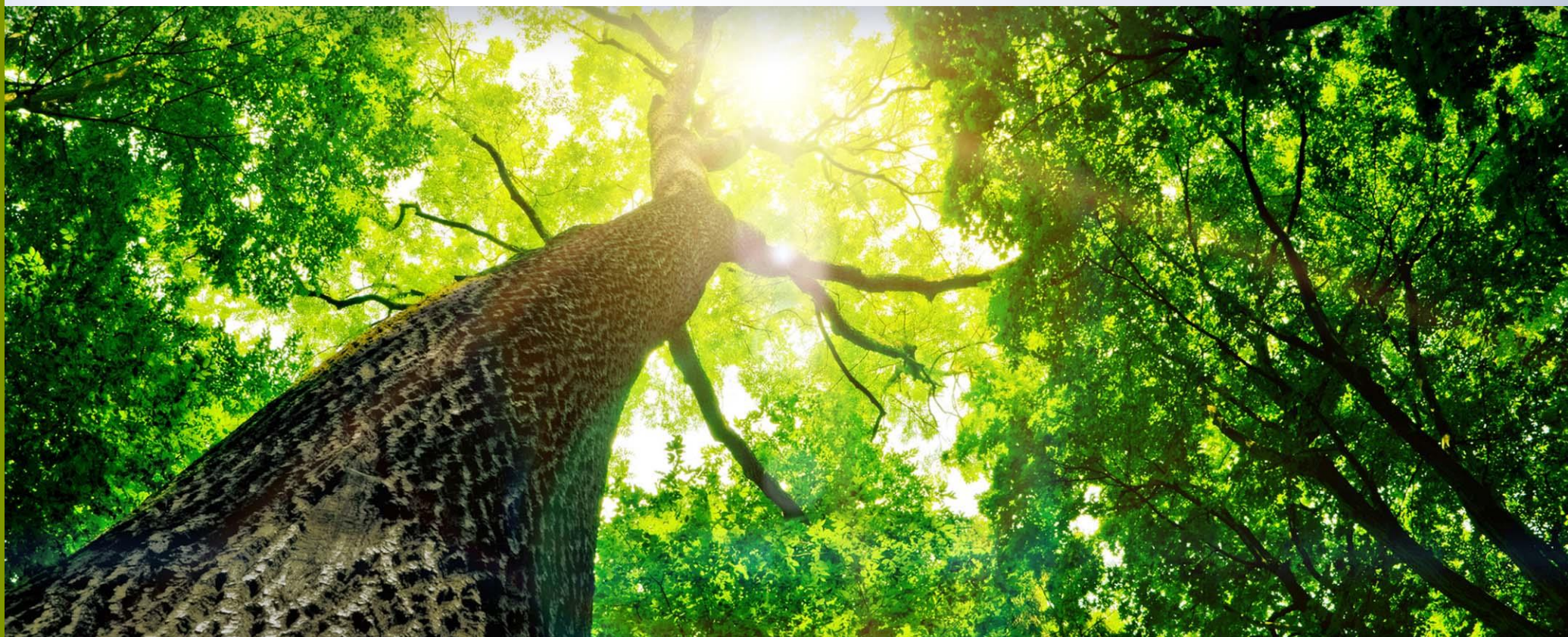
"If you are 'unsatisfied' or 'very unsatisfied' with any of the topics in this chapter, 'RFC Governance', please specify the main reasons and your proposals and ideas for improving your involvement in the RFCs' activities."



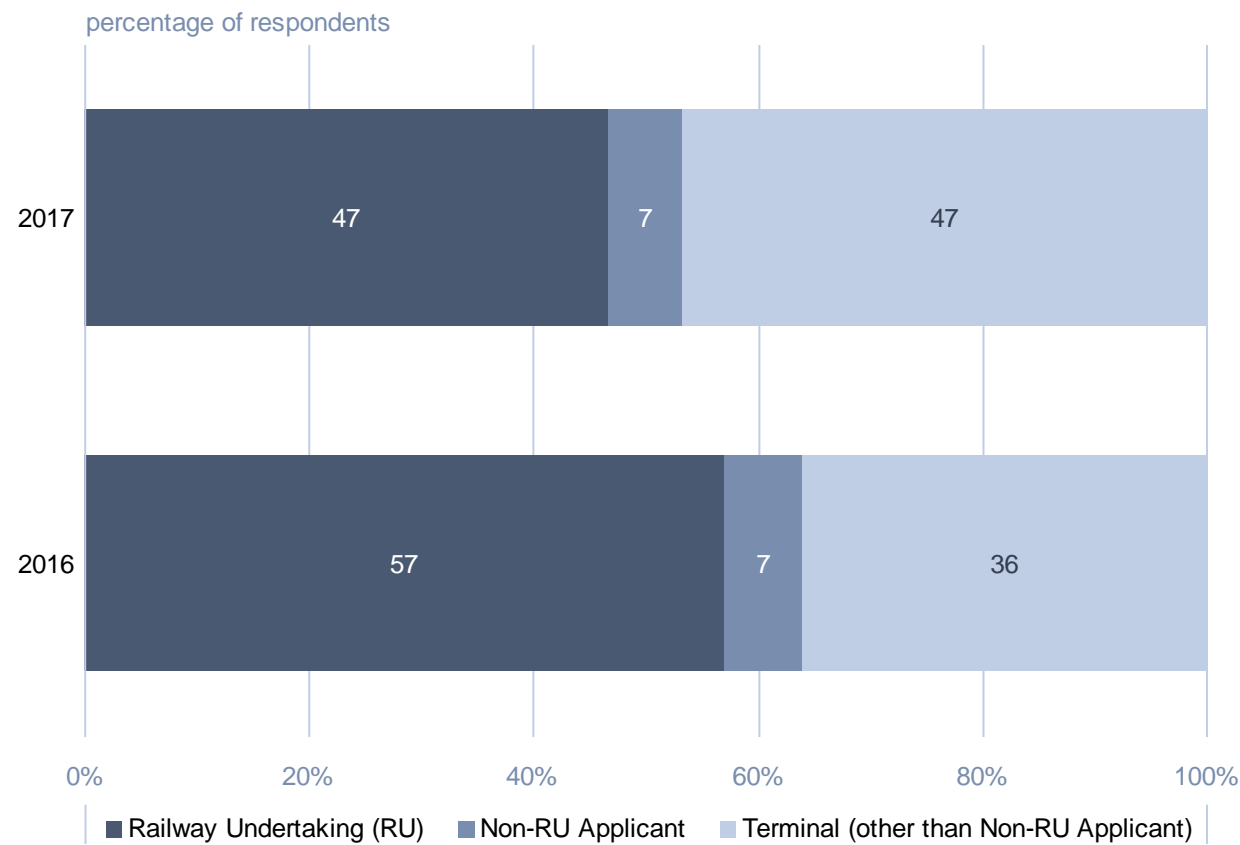
"To which extent are you satisfied with the information provided by RFC's website? || To which extent are you satisfied with the information provided by the RAG/TAG meetings? || To which extent are you satisfied with the communication with and information provided by the Management Board of the RFC other than at the RAG/TAG meetings? || To which extent are you satisfied with the annual report published by the RFC? "

- reports should include more operational topics or topics relevant the business of the RUs
- the report should be the base to decide for actions (more rapidly)

"If you are 'unsatisfied' or 'very unsatisfied' with any of the topics in this chapter, 'Overall RFC Communication', please specify the main reasons and your proposals and ideas on which subjects you would like the RFC to communicate more."



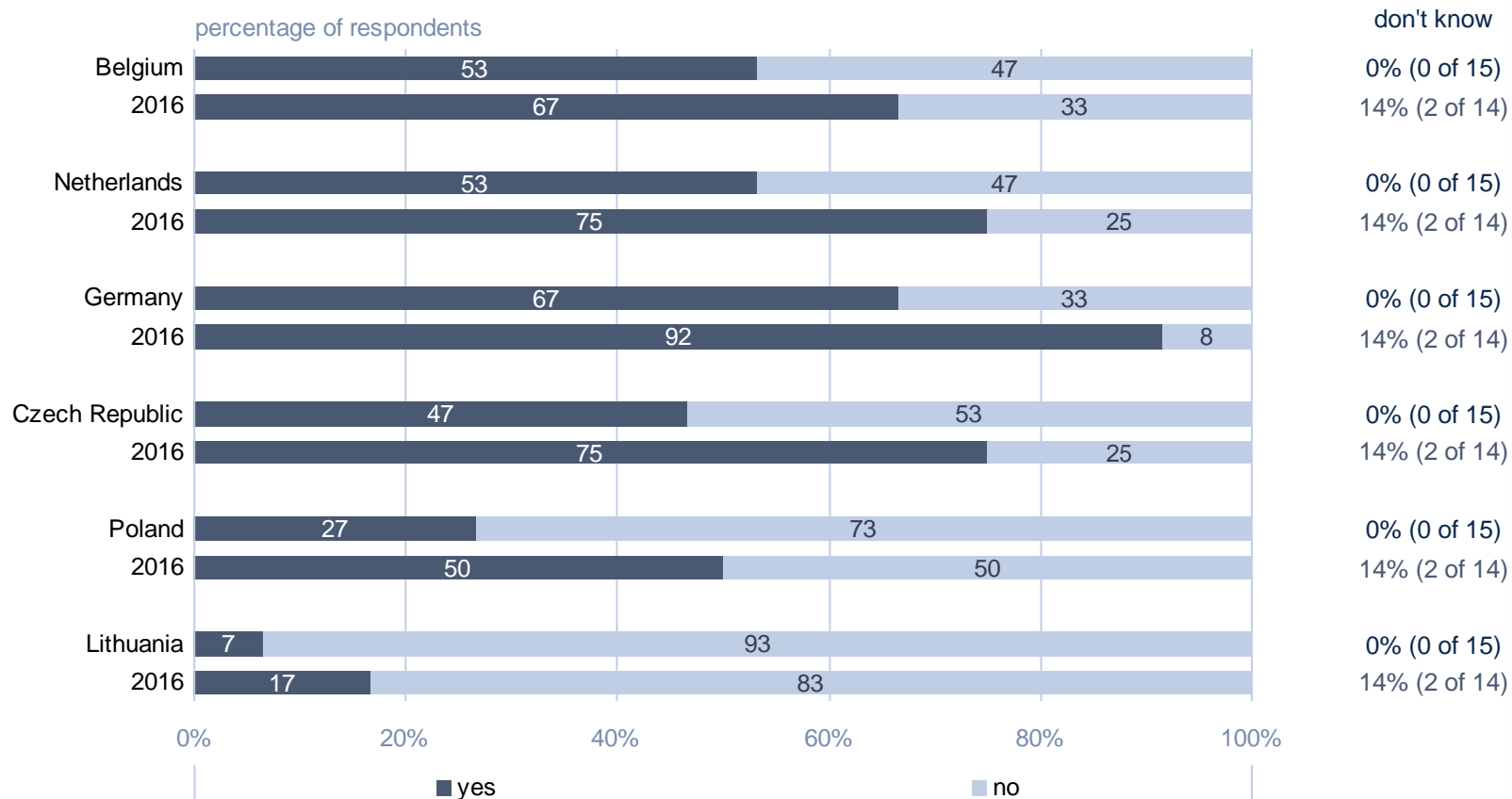
3 Sample Description



"To which of the following types of target groups does your company belong?"

n = 15; 14 || potentials/non-user included

Usage of different corridor sections



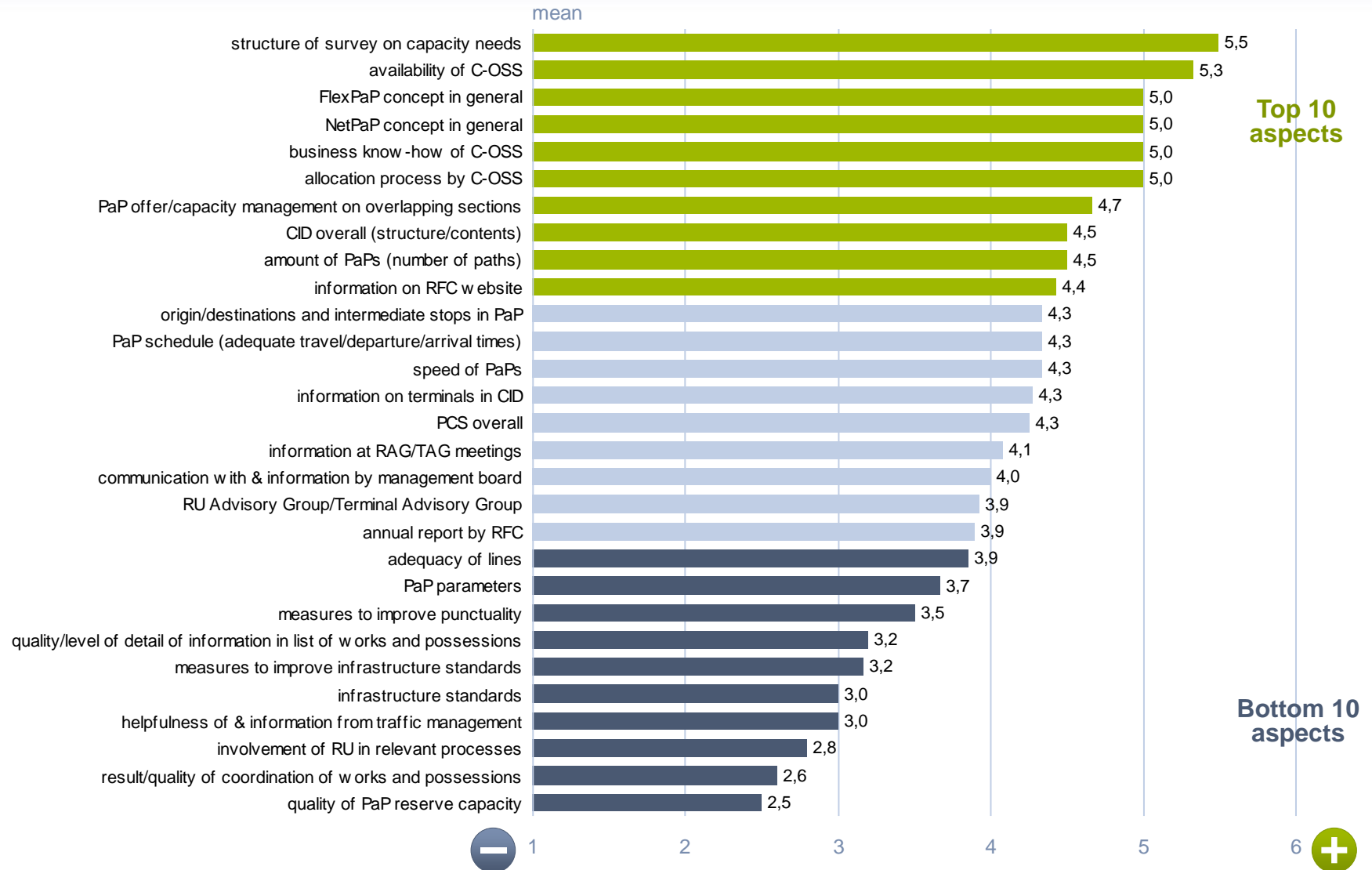
different scale in 2016: daily/several days per week/weekly/monthly/yearly/never

"In which countries involved in the RFCs you have chosen before does your company operate/run international services?"

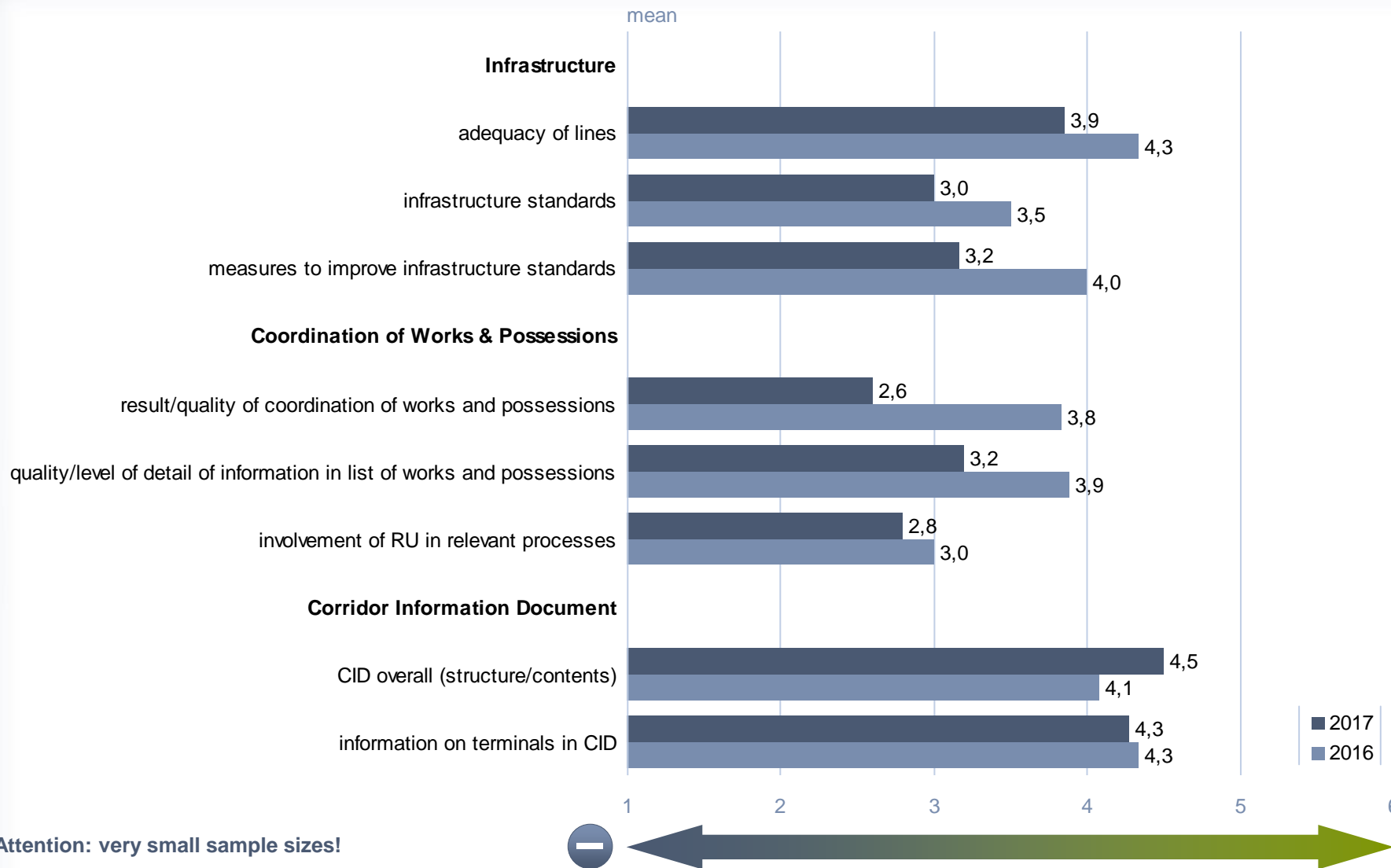
n = 15; 14

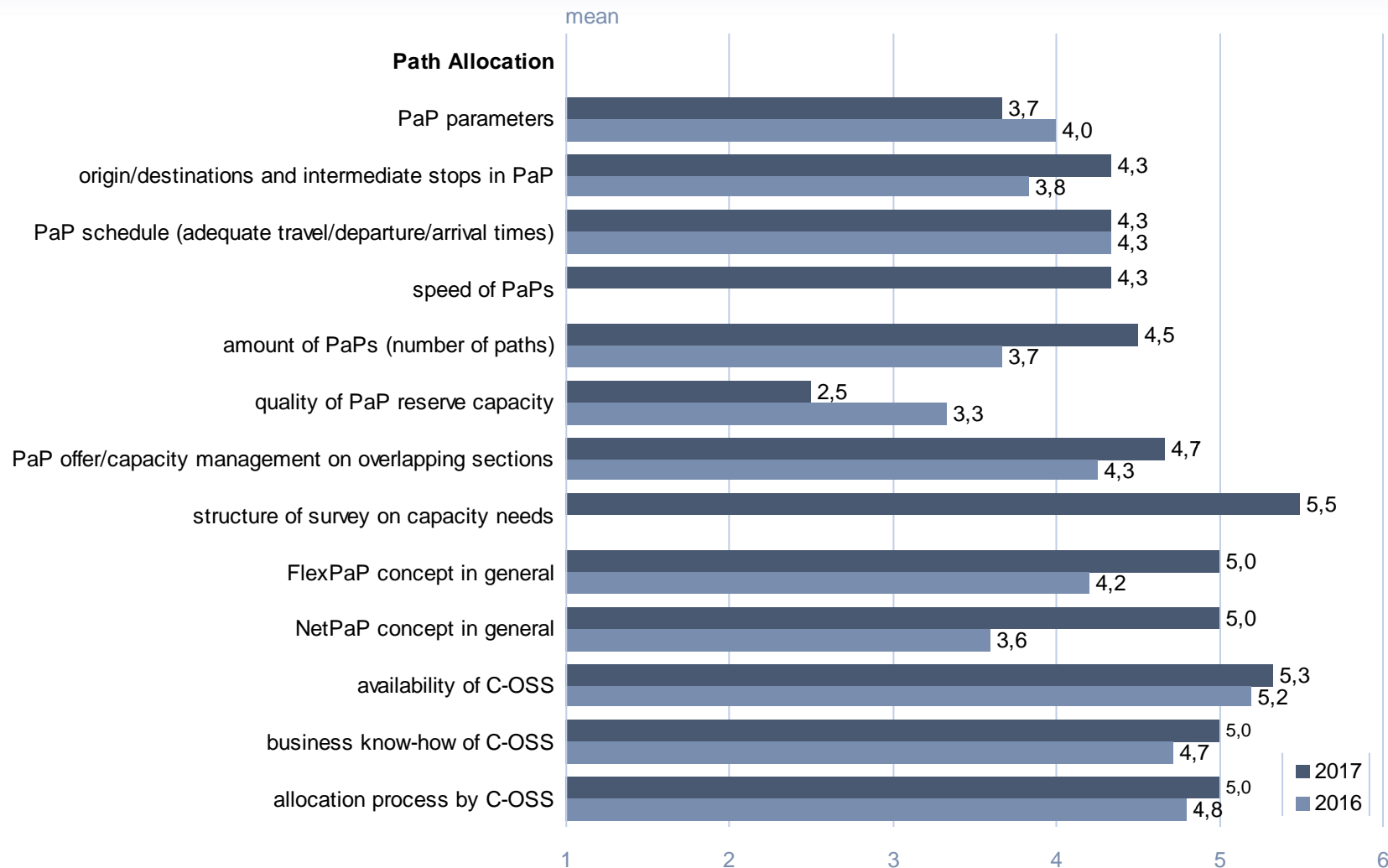


4 Summary



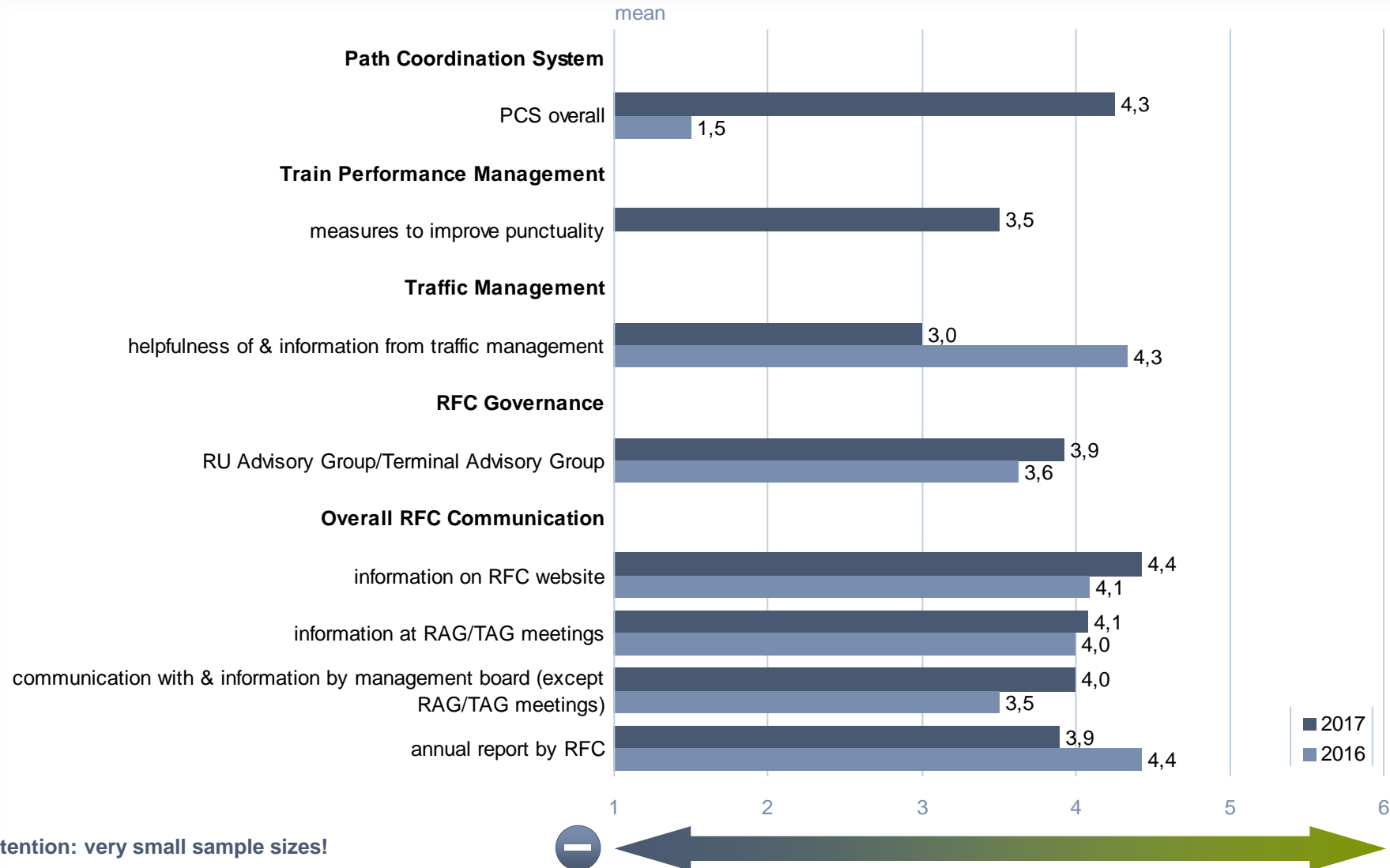


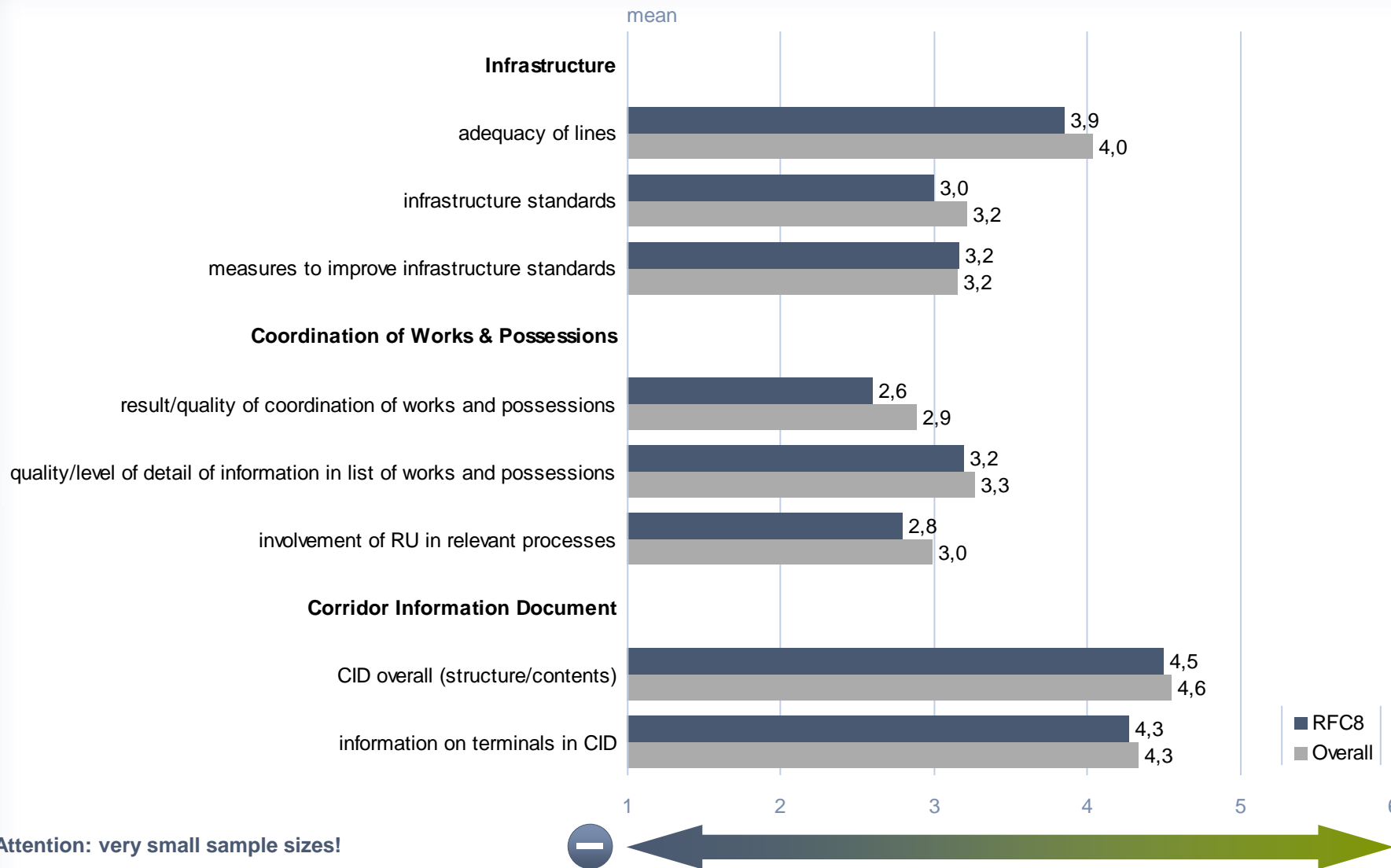


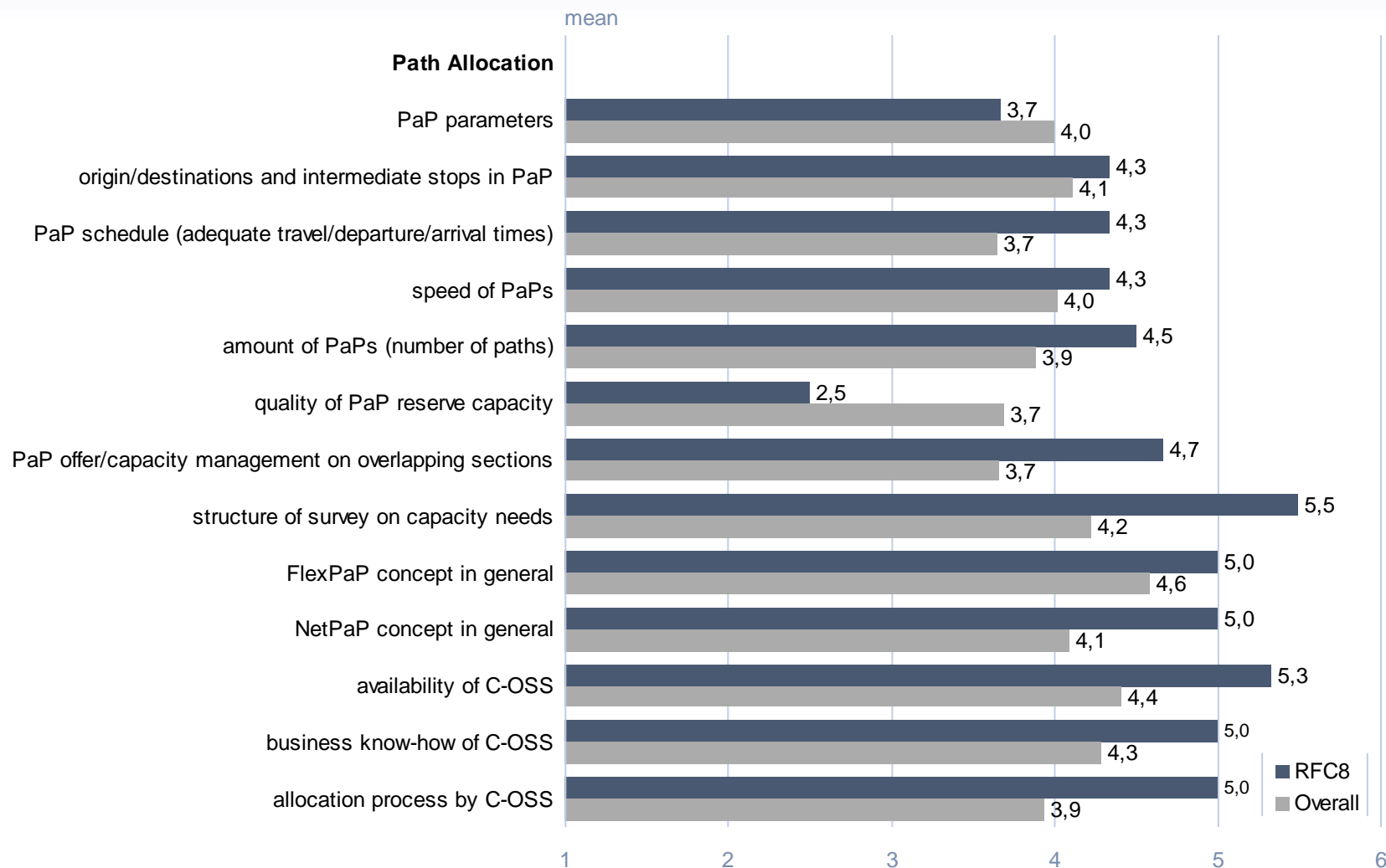


Attention: very small sample sizes!



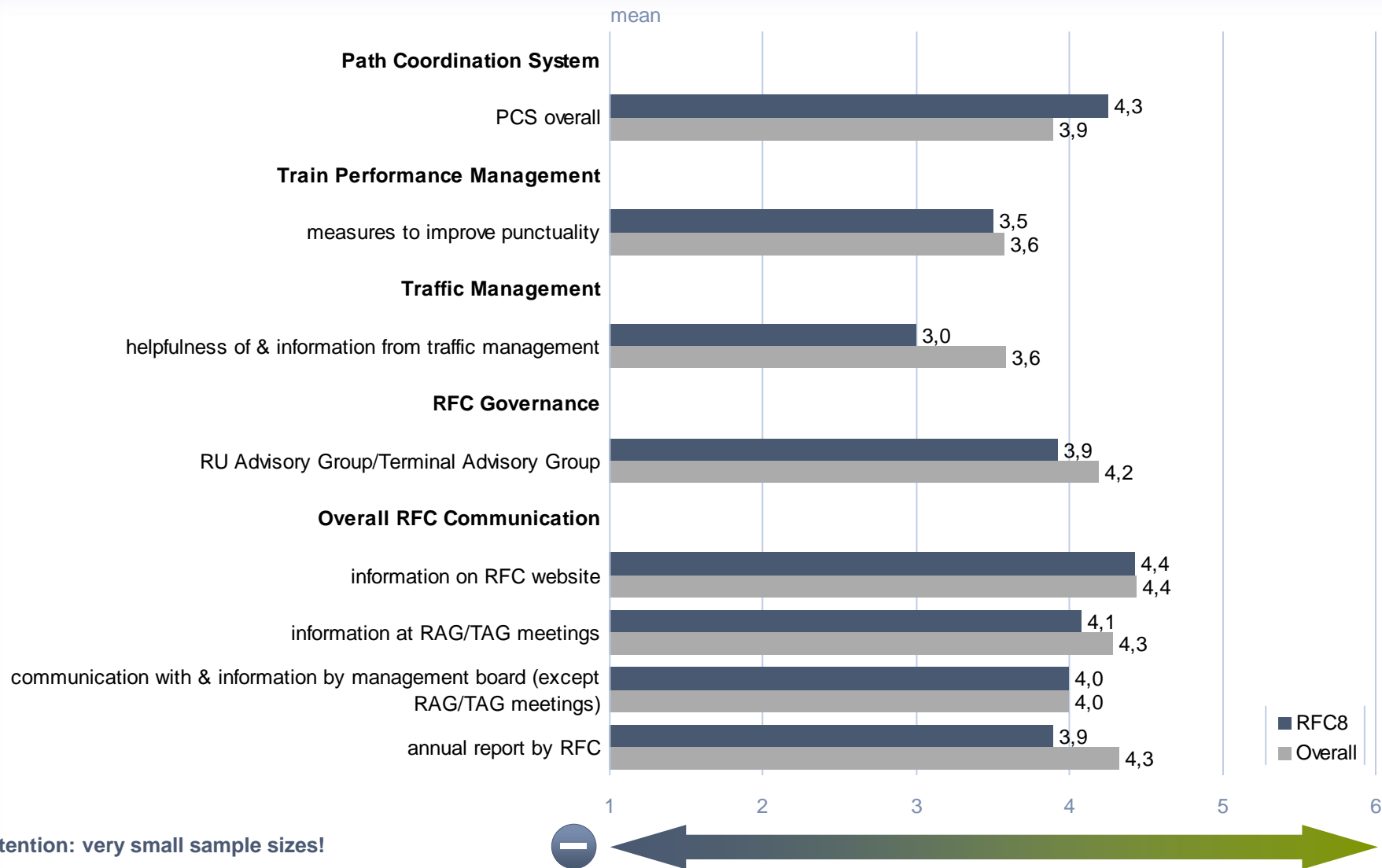






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