



Rail Freight Corridor  
North Sea – Baltic

# ANNUAL REPORT 2023



Funded by  
the European Union

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## List of Abbreviations

AB – Allocation Body

AG – Advisory Group

CEF – Connecting Europe Facility

CID – Corridor Information Document

CINEA – European Climate, Infrastructure and Environment Executive Agency

CIP – Customer Information Platform

CIS - Charging Information System

CNC – Core Network Corridor

C-OSS – Corridor One-Stop-Shop

DAC - Digital Automatic Coupling

EC – European Commission

ECCO - Efficient Cross Corridor Organisation

EEIG – European Economic Interest Grouping (EZIG in Polish)

ERTMS - European Rail Traffic Management System

ETC - European Transport Corridor

EU – European Union

ExBo – Executive Board

FCA – Framework for Capacity Allocation

HaP- Harmonized PaP

ICM – International Contingency Management

IM – Infrastructure Manager

KPI – Key Performance Indicator

MB – Management Board

MDMS - Multimodal Digital Mobility Services

MoT – Ministry responsible for transport

NCI - Network and Corridor Information System

NExBo – Network of Executive Boards of RFCs

PaP – Pre-arranged Path

PCS – Path Coordination System

PIM – Project Implementation Manager

PMO – Project Management Office

QCO – Quality Circle Operation

RAG – Railway undertaking Advisory Group

RB – Regulatory Body

RC – Reserve Capacity

RFC – Rail Freight Corridor

RFC NS-B - Rail Freight Corridor North Sea – Baltic

RFC OEM – Rail Freight Corridor Orient/East-Med

RFP - Rail Facilities Portal

RIS - Railway Infrastructure System

RNE – RailNetEurope

RU – Railway Undertaking

SERAC – Single European Railway Area Committee

SERAF - Single European Railway Area Forum

TAG – Terminal Advisory Group

TCR - Temporary Capacity Restriction

TEN-T - Trans-European Transport Network

TIS – Train Information System

TMS - Transport Market Study

TT – Time Table

USS - User Satisfaction Survey

UIRR – International Union for Road-Rail Combined Transport

WG – Working Group

## FOREWORD

*Dear Reader,*

*As we reflect on the past year, Rail Freight Corridor North Sea - Baltic remains a vital link in the European rail network. In the past year, we faced challenges and seized opportunities that have shaped the Corridor's trajectory.*

*In response to the challenges posed by the war in Ukraine, RFC NS-B continues to play a crucial role in facilitating agricultural exports and bilateral trade through the EU-Ukraine Solidarity Lanes, where rail transport played, and still plays, a pivotal role. We managed to transport record-breaking volumes of goods out of Ukraine – but it was not without challenges. This is also reflected in the overall increase by 4.1% of the number of trains running on our Corridor, compared to 2022, mainly due to the transport from Ukraine to the Polish and Lithuanian ports. However, the situation on individual border points is less positive as most Baltic States are still hit hard by the consequences of the Russian war of aggression. The western parts of the Corridor also see a decrease in the number of trains which can be partly explained by the drop in the volumes handled in the major European ports. We will continue to work on facilitating the rail freight connections between Ukraine and the rest of Europe.*

*Looking ahead, the soon to be approved revision of the TEN-T regulation will change the face of the Corridor. The proposal foresees the extension of RFC North Sea – Baltic to Sweden, Finland and Ukraine, as well as the Czech Republic no longer being part of the Corridor. These changes should also be looked at in the frame of the proposal made by the European Commission in July 2023 regarding the use of railway infrastructure capacity in the single European railway area. We remain aware of the potential challenges during the implementation phase. As we navigate the transformative journey outlined in those revisions, we can assure our stakeholders that we will continue business as usual. With a wealth of experience and market knowledge accumulated over the years, RFC NS-B stands resilient in the face of evolving regulations. Our dedication, coupled with our established expertise, positions us to navigate the changes ahead while ensuring the reliability and efficiency our stakeholders have come to expect.*

*We extend our heartfelt thanks to all individuals and entities involved in the Corridor's journey in 2023. The Railway undertaking Advisory Group, Terminal Advisory Group, Working Groups, Project Management Office, RNE, the European Commission, and the dedicated individuals within our Executive and Management Board have been instrumental in the Corridor's success. We sincerely hope for their continued support in the future.*



**Oliver Sellnick**

*Chairman of the Management Board*



**Katarzyna Wachowicz**

*Managing Director*

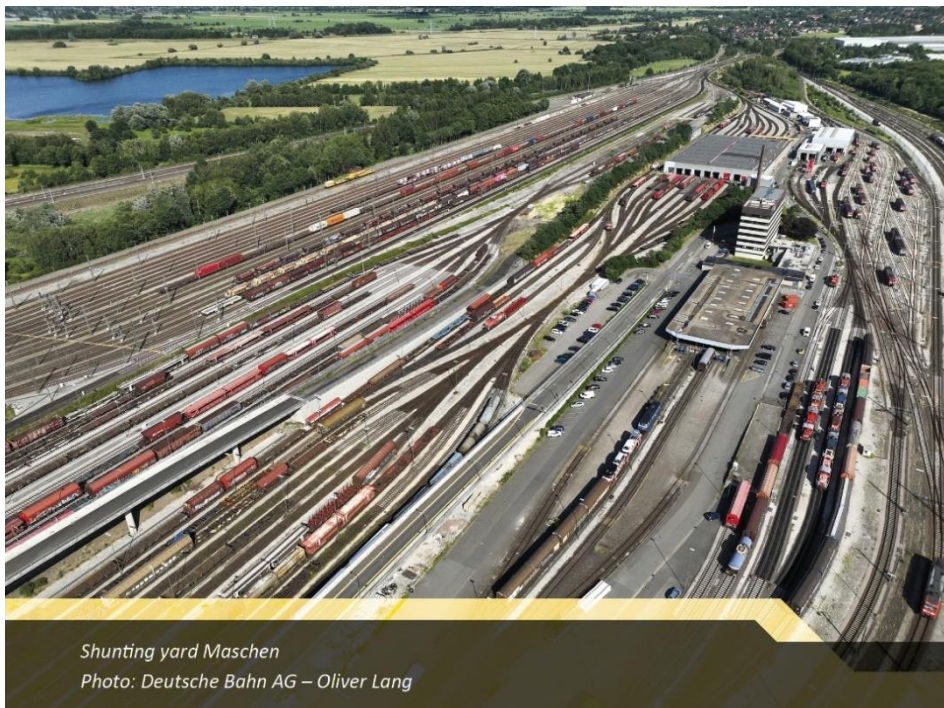
## INTRODUCTION

This document presents the annual report 2023 of Rail Freight Corridor North Sea – Baltic (RFC NS-B). The report provides Corridor stakeholders with general information on activities of the Corridor in the past year. RFC NS-B runs through 8 Member States of the European Union (EU): starting in the North Sea ports Antwerp-Bruges<sup>1</sup>, North Sea Port (Gent/Terneuzen), Rotterdam, Amsterdam, Wilhelmshaven, Bremerhaven and Hamburg spreading into central Germany through Aachen – Hannover/Magdeburg/Berlin to Warsaw and Terespol. A branch leads from Magdeburg to Prague via Falkenberg and Dresden. In Falkenberg starts the Southern branch in Poland to Wrocław, Katowice and Medyka. Another branch leaves from Poznań to Kaunas and to Riga and Tallinn.

RFC NS-B current routes comprise:

- 5 253 km of principal lines,
- 2 552 km of diversionary lines,
- 891 km of connecting lines,
- 960 km of expected principal and expected diversionary lines,
- 257 terminals
- 13 seaports: Port of Antwerp-Bruges, North Sea Port, Rotterdam, Amsterdam, Wilhelmshaven, Bremerhaven, Hamburg, Riga, Ventspils, Liepāja, Paldiski, Muuga and Sillamäe.

More detailed information on the Corridor's routing and its development can be found on the [Corridor's website](#) and in the [Customer Information Platform \(CIP\)](#).



<sup>1</sup> Name of the unified port company after the merger of the ports of Antwerp and Zeebrugge.

## 1. GOVERNANCE

The governance structure of RFC NS-B is divided into three levels: the Executive Board (ExBo), the Management Board (MB) and the Advisory Groups (AG), working together to develop the Corridor. The Executive Board is composed of representatives of Ministries (MoTs) in charge of rail transport of the cooperating countries and is responsible for defining the general goals of the Corridor. The Management Board consists of representatives of the cooperating Infrastructure Managers (IMs) and Allocation Body (AB) and serves as the decision-making body of the Corridor. The Advisory Groups, consisting of Railway undertakings (RUs) and interested applicants and Terminal owners/operators, issue opinions on any proposal by the Management Board, which has direct consequences for them or issue own-initiative opinions, which shall be considered by the Management Board.

The governance structure of the Corridor is illustrated in the below organigram.



### 1.1 EXECUTIVE BOARD

The Executive Board (ExBo) of RFC NS-B, as referred to in Article 8 of Regulation (EU) 913/2010 (hereinafter “the Regulation”), was established on the 20th of March 2012 by the Mission Statement, which was replaced by the Joint Declaration of Intent regarding the establishment of the Executive Board of RFC North Sea-Baltic dated on the 22nd of November 2019 extending RFC NS-B to the Republic of Latvia and the Republic of Estonia.

The Executive Board is composed of the representatives of the authorities of the Kingdom of Belgium, the Czech Republic, the Republic of Estonia, the Federal Republic of Germany, the Republic of Latvia, the Republic of Lithuania, the Kingdom of the Netherlands and the Republic of Poland.

Its decisions are based on mutual consent. The Executive Board takes legally binding and directly applicable decisions within the scope of its powers defined by the Regulation. They are signed by all members of the Executive Board and are published.

The Board meets four times a year and has a rotating presidency. It was chaired in 2023 by the Latvian Ministry of Transport.



## FULL REPRESENTATIVES OF THE EXECUTIVE BOARD



## STAND-IN REPRESENTATIVES OF THE EXECUTIVE BOARD



### 1.1.1 Key activities of the Executive Board

The ExBo's meetings in 2023 were held in:

- March 2023 – Riga (Latvia);
- June 2023 – Tallinn (Estonia)
- October 2023 – Frankfurt (Germany)
- December 2023 – Brussels (Belgium).

The general responsibility of the Executive Board is to implement the Regulation.

One of the important topics discussed by the ExBo was the legislative process of the Proposal for a Regulation of the European Parliament and of the Council on Union guidelines for the development of the trans-European transport network, amending Regulation (EU) 2021/1153 and Regulation (EU) No 913/2010 and repealing Regulation (EU) 1315/2013. ExBo members exchanged and aligned their positions regarding this new TEN-T regulation proposal and evaluated the possible impact on the Corridor operations. An important topic was the proposed migration to the 1,435mm track gauge system as per Regulation Article 16a and the respective need to coordinate national migration plans. The discussions also focused on the new routing of the Corridor, changes in the participating Member States and the extension to Ukraine. One important aspect is the transformation of the "RFC" into a new format, namely the freight governance of the corresponding European Transport Corridor (ETC).

The EU Initiative to better manage and coordinate European rail capacity and traffic management (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 published in July 2023) was another important discussion topic, as the legislation proposal will have a major impact on the Corridor. According to the Regulation proposal, RFCs will only operate until 2029. In this regard, the ExBo had extensive discussions on the possible impact and necessary steps to ensure a smooth transition. Concerns were raised regarding the need to maintain Member States presence in the rail freight governance.

Another important item for discussion was the Digital Automatic Coupling (DAC) initiative. The ExBo indicated concerns related to the important costs linked to its implementation, especially in case of a "big bang" migration scenario. The ExBo will continue to monitor the DAC implementation on the Corridor.

The ExBo also dealt with a general analysis of the operational quality and the best way to improve it. Further work on this topic will be carried out in 2024.

The ExBo furthermore approved the update of the Implementation Plan prepared by the Management Board of the Corridor (see also Chapter 2.2).

The ExBo also prepared and submitted its bi-annual report for the years 2021 - 2022 pursuant to Article 22 of Regulation (EU) 913/2010 concerning a European rail network for competitive freight. The report reflected the ExBo's analysis of the Implementation plan, reviewed the main findings from the TMS and Corridor extensions. Key Performance Indicators (operations, capacity management, market development) of the Corridor were analysed. The report was submitted to the Commission on 8<sup>th</sup> of November 2023.

The ExBo of RFC NS-B finally supported applications from the members of the Corridor to the 2022 Connecting Europe Facility (CEF) Transport Call and to the 2023 CEF Transport Military Mobility Call.

### **1.1.2 Cooperation at EU level**

In 2023, the members of the ExBo participated in the meetings of the Network of Executive Boards of the RFCs (NExBo). The NExBo was co-chaired by Belgium and Denmark during that period. The forum has been put in place to exchange best practices among the ministries participating in the different RFCs.

Two meetings took place in 2023, in June and November. Various topics were on the agenda. Among them, as for RFC NS-B, the draft TEN-T Regulation and the proposal for a Regulation on Rail Capacity were heavily discussed. A dedicated meeting on this last point was also organized on 27 September among members of the NExBo and with the Commission.

Other topics, such as the follow-up of the work done at RNE level, the relaunch of the KPI Working Group (WG) and information on studies launched by the European Commission were also discussed at the level of the NExBo.

### **1.1.3 Revision of Regulation (EU) 913/2010**

Further operation of the rail freight corridors will be affected by the extensive regulation revision process. The TEN-T regulation revision proposed extensive amendments to the RFC regulation. Those amendments provide that, from the date of entry into force of the new TEN-T Regulation, Member States and Infrastructure Managers responsible for the freight lines that are part of the European Transport Corridors, shall adjust the organisation and management of the freight corridor within 18 months.

It is proposed that the ExBo and the MB of a freight corridor shall cooperate with the European Coordinator in relation to the infrastructure and investments needs resulting from the rail freight traffic to support the drawing up of the work plan. There are various further amendments proposed with the aim to facilitate the entry into force of the new TEN-T regulation.

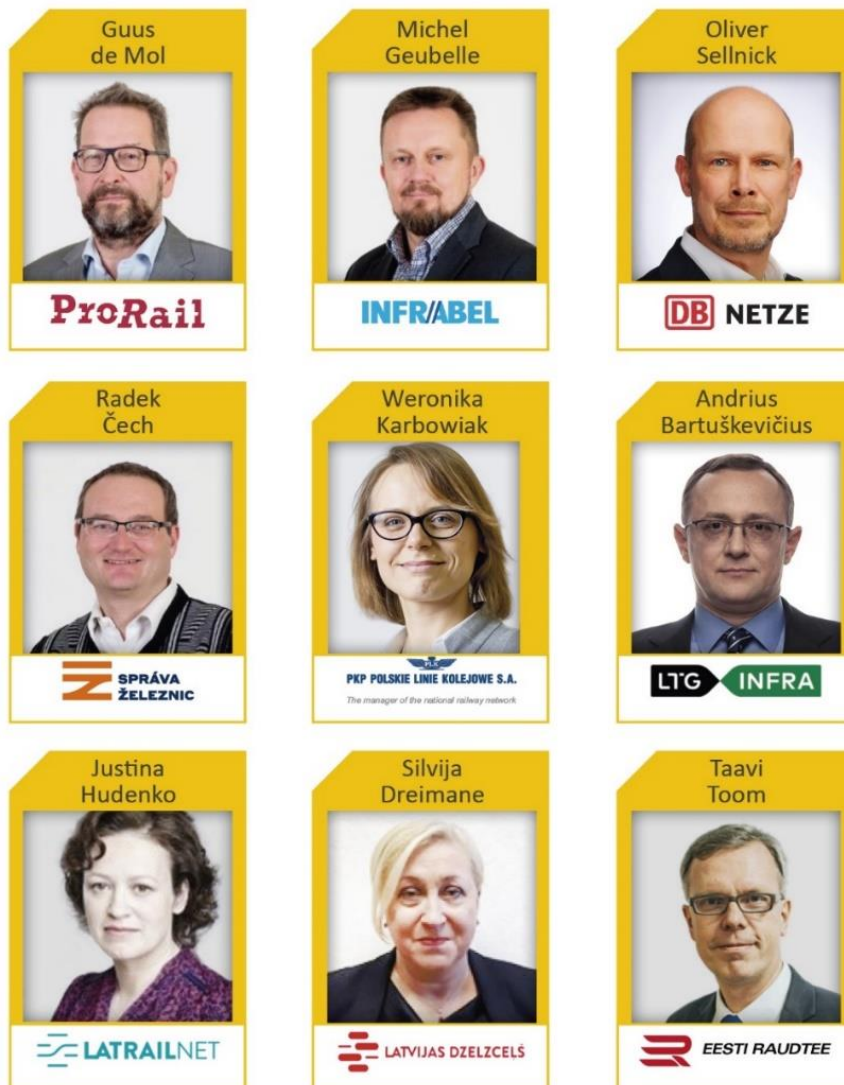
Rail freight corridors will be further affected by the new Rail Capacity proposal. According to Article 76 of this proposal, Regulation (EU) No 913/2010 will be repealed from 9 December 2029. This proposal reflects the policy whereby rail freight shall be worked upon using a network based rather than a corridor based approach.

The ExBo discussed the proposals and expressed its view that it is necessary to develop proper transitional provisions enabling the smooth completion of rail freight corridor governance duties. Also, concerns were expressed how to maintain representation of various stakeholders (terminals, railway undertakings and ministries) in the future rail governance formats.

## 1.2 MANAGEMENT BOARD

In 2023, the Management Board (MB) chaired by Mr. Oliver Sellnick from DB Netz AG<sup>2</sup> held five online meetings and four physical meetings. The activities of the Management Board, carried out in 2023, are further described in chapters 2 to 4. Since 2016, the MB has the legal form of a European Economic Interest Grouping (EEIG). It is composed of the following Members representing the Infrastructure Managers (IM) and Allocation Body (AB) of the eight countries of the Corridor.

### MANAGEMENT BOARD



<sup>2</sup> Alteration of name to DB InfraGO AG on 01.01.2024.

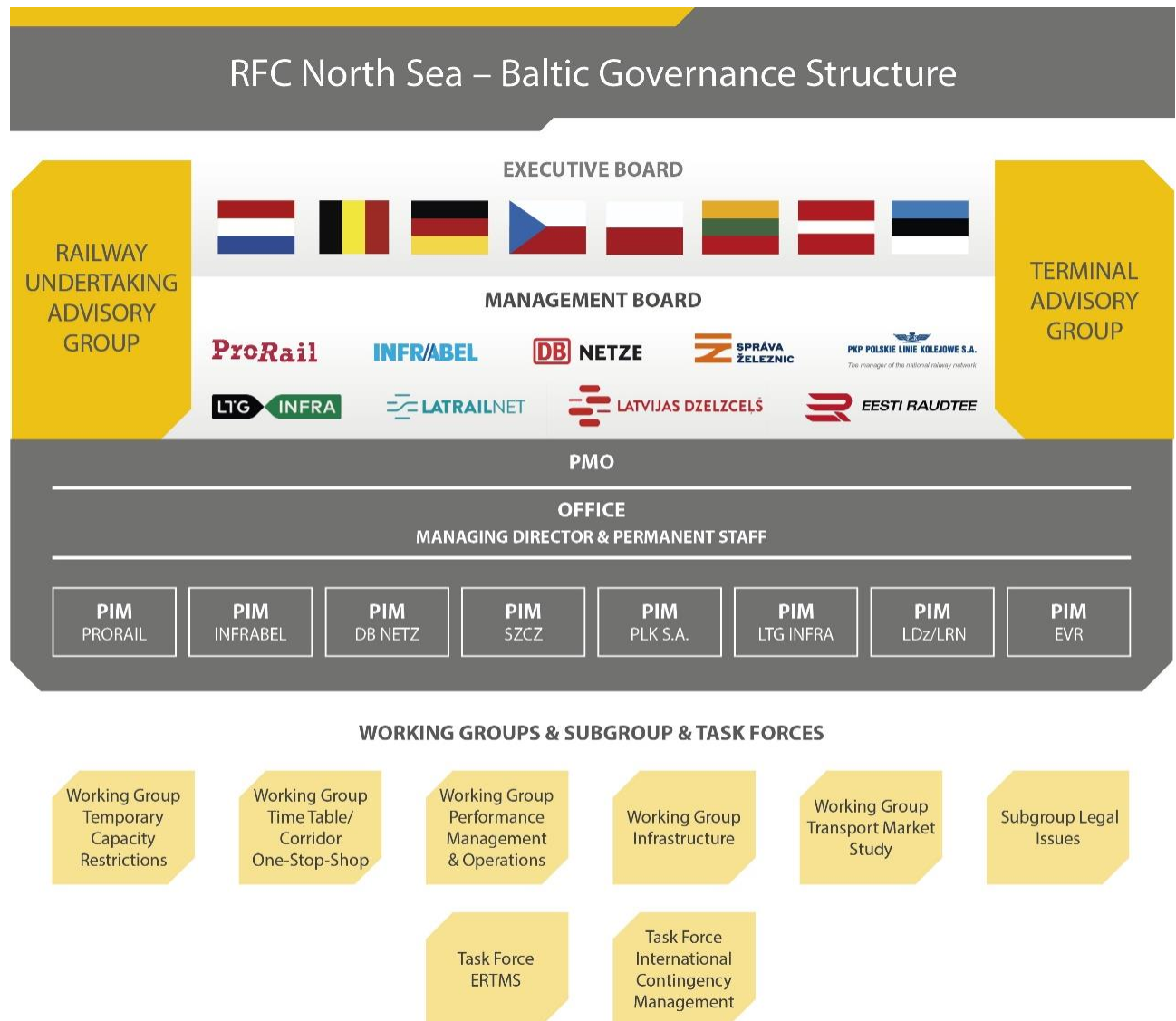
The Management Board is supported by the Project Implementation Managers (PIMs) and the RFC Office with its permanent staff and Managing Director, Katarzyna Wachowicz, who was officially appointed in 2023.



In 2023, three online and five physical meetings of the Project Management Office (PMO) took place.



The below organigram illustrates the structure of the Project Management Office and the different working groups:



### 1.3 ADVISORY GROUPS

Each Advisory Group (AG) serves as a platform to facilitate the exchange of information, finding solutions and mutual understanding in a non-discriminatory way. As advisory body, each group issues opinions on decisions by the Management Board, which have direct consequences to its members or issues own-initiative recommendations, which shall be considered by the MB.



Erik Nieuwenhuis



Paweł Wiechoczek

Each AG is chaired by a Speaker, who acts as the contact person between the MB and the AG members. In 2023, the Terminal Advisory Group (TAG) was chaired by Mr. Erik Nieuwenhuis from the BTT Rail Terminal Rzepin Spółka z o.o. and the RAG (Railway undertaking Advisory Group) by Mr. Paweł Wiechoczek from DB Cargo Polska. The Management Board of RFC NS-B would like to thank the Speakers for their commitment and cooperation.

Two Advisory Group meetings were held in 2023 with representatives of Railway undertakings, Terminals, Infrastructure Managers, Ministries, Regulatory Bodies (RBs) and invited guests on:

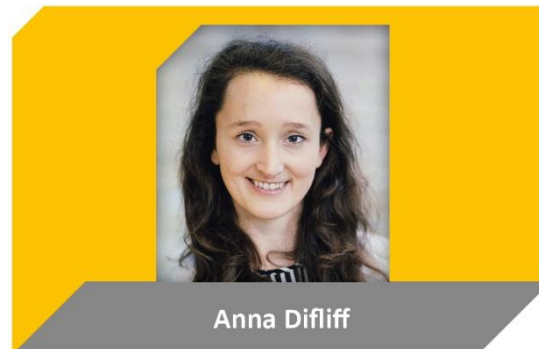
- 16th of March 2023 in Riga
- 11th of October 2023 in Frankfurt am Main.

Both meetings were attended by more than 30 participants each. During the first RAG/TAG meeting, Latvian Transport Minister Mr. Jānis Vitenbergs welcomed the participants and pointed out the importance of the RFC NS-B project. The Infrastructure Managers from Latvia and Estonia presented their companies. During both meetings the following topics were discussed: border crossing issues, Rail Baltica and the Rail Facilities Portal (RFP). During the first meeting, the Corridor One-Stop-Shop (C-OSS) Manager informed participants about the offer published in January 2023, including the improvements implemented for the PaP capacity offer for TimeTable (TT) 2024. Continuing the discussion, during the second AG meeting the C-OSS Manager presented the results of the TT 2024 allocation and first views on the offer for TT 2025. Participants were also presented with the RFC NS-B User Satisfaction Survey 2022 results and the action plan. The state of play regarding the Temporary Capacity Restrictions (TCRs) on the Corridor was also presented. During the meeting in Frankfurt am Main discussion regarding the Rail Facilities Portal continued as a follow-up from the webinar trainings for service facility owners and operators, organized by the RFC NS-B C-OSS Manager and RFC NS-B TAG Speaker in cooperation with RNE and UIRR (International Union for Road-Rail Combined Transport). The survey regarding the Rail Facilities Portal webinars was executed. The webinars were evaluated as 'excellent' by all respondents due to the comprehensive information from a user-perspective and its good structure. Participants suggested to elaborate more on the integration with RIS in the future.

## 2. MAIN ACTIVITIES

### 2.1 CORRIDOR ONE-STOP-SHOP AND CORRIDOR OFFER

The Corridor One-Stop-Shop (C-OSS) is the joint body designated by the IMs / AB involved in RFC NS-B and the single point of access providing the Corridor capacity products to all rail freight applicants. Anna Difliff is the C-OSS manager on behalf of RFC NS-B.



RFC NS-B is highly committed to offer capacity products that comply with the market demand and the expectations of applicants regardless if they are RU or non-RU applicants. To achieve the aim to be a customer- and service-oriented Corridor with fitting capacity products, the applicants are asked for direct and indirect feedback that supports the C-OSS Manager to shape the capacity portfolio constantly.

To intensify the close cooperation with applicants and improve the capacity offer, the C-OSS Manager participated in the:

- Forum Train Europe Conferences B (on-site) and D (online)
- RailNetEurope (RNE) working group for the development of the Path Coordination System (PCS Capacity Broker) with applicants' involvement
- C-OSS Community working group
- International trade fairs such as the transport logistic in Munich and the TRAKO Railway Fair in Gdansk.

Besides that, the C-OSS took part in several RNE meetings to advise on international processes and working methods in cooperation with applicants and IMs.

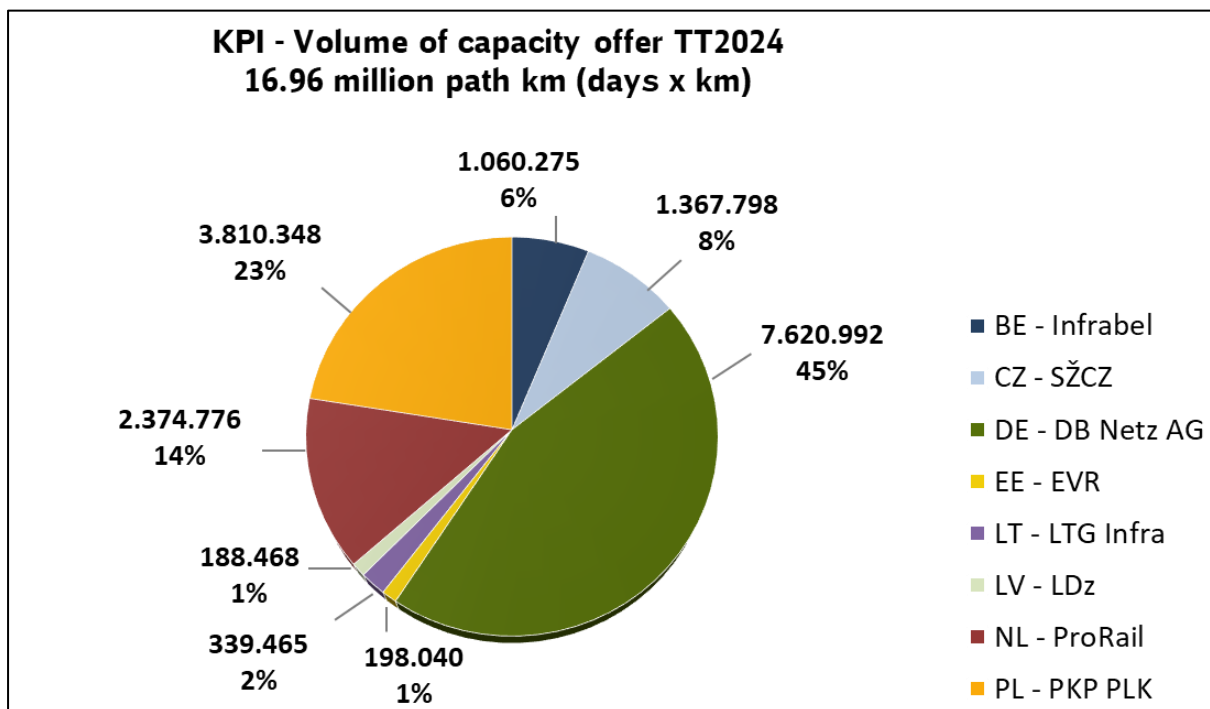
Moreover, the C-OSS Manager was acting as the leader of the RFC NS-B working group TT/C-OSS which met 6 times throughout 2023. Based on the knowledge of national developments in rail freight transport and deep understanding of the market needs, this working group is deriving essential insights for capacity-related issues and further developments of the Corridor. Throughout customer events and individual meetings organized by the C-OSS, applicants were trained in using the Path Coordination System (PCS), the ordering system to request international paths in one step and in a single operation.

The C-OSS also took a leading role in the organization of a series of webinars on the [Rail Facilities Portal](#) (see also 1.3). The content of the three webinar sessions focused on the minimum data requirements for terminals, as well as the data upload to and data maintenance in the RFP. The webinars were recorded (click [here](#) to rewatch them) and important documents were shared via email and on the event website.





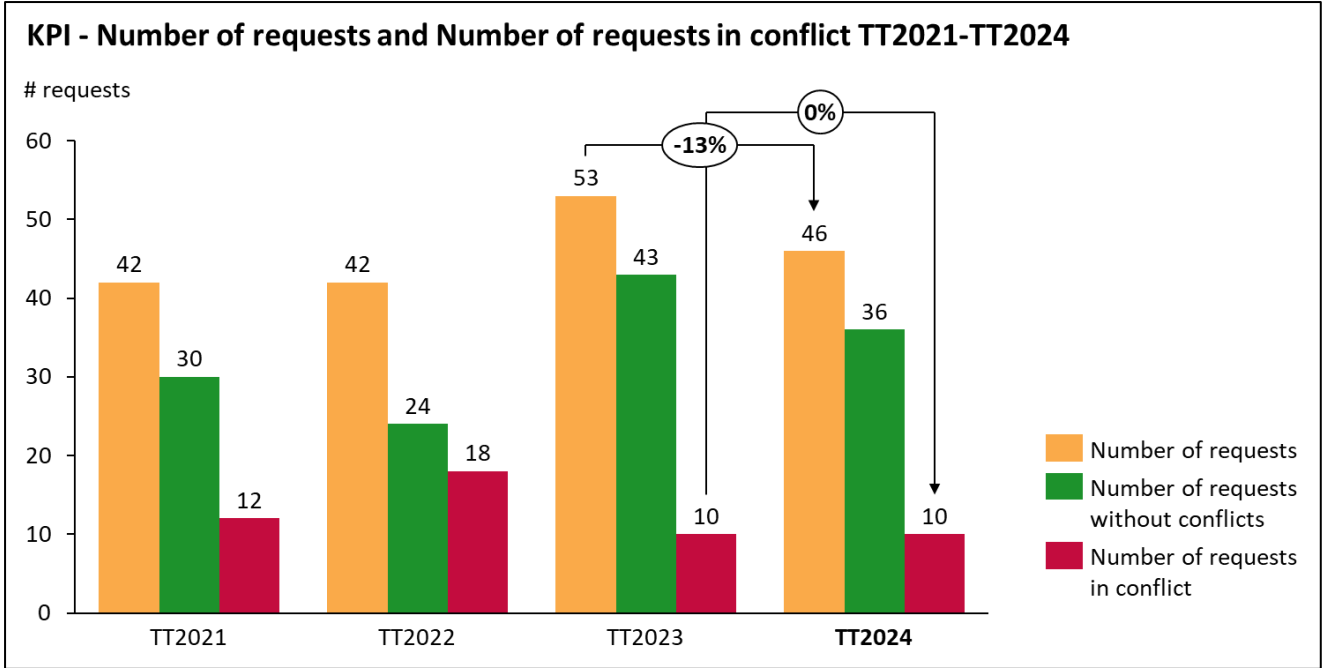
The PaP capacity offer TT2024 has been increased for the harmonized PaPs towards RFC ScanMed from 2 to 4 paths per direction. The offer also developed positively due to a reduced number of TCRs on DB Netz and SZCZ networks. Overall, the PaP capacity offer on RFC NS-B for TT2024 improved beyond the level of TT2023 thanks to longer path sections, mainly in DB Netz and ProRail networks.



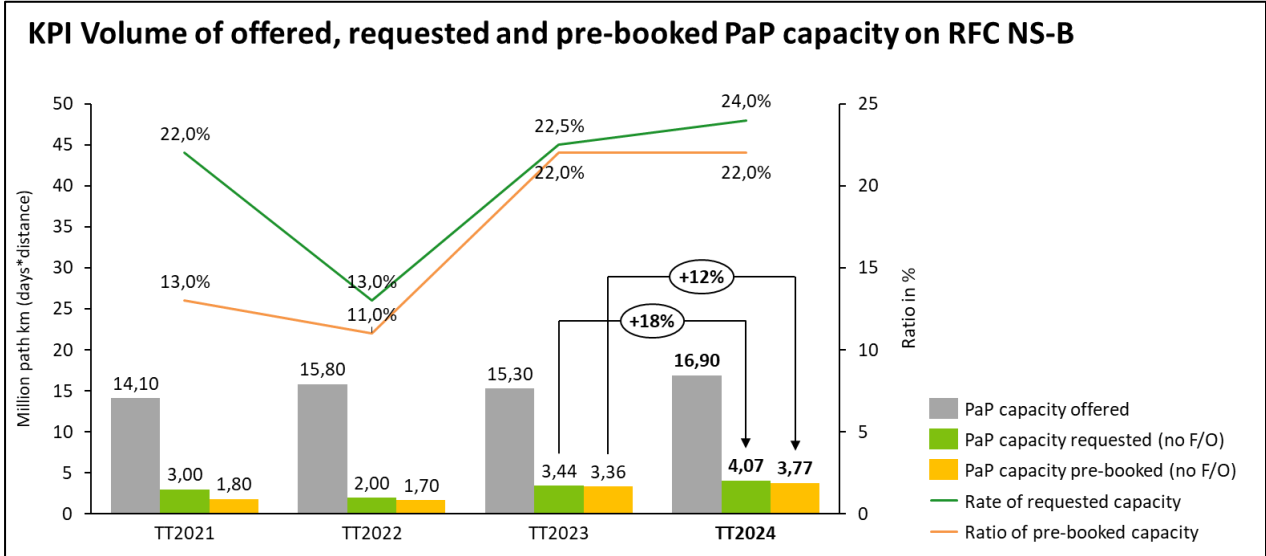
16.96 million path km were constructed as PaPs and offered to the European applicants to request for their individual international traffics until the 11<sup>th</sup> of April 2023 for TT2024.

**Allocation of PaPs for TT2024**

Nine leading applicants were involved in requesting paths for international freight traffic along the Corridor. All requests were placed on time in PCS. The graph below presents the comparison of the number of requests, where the RFC NS-B C-OSS was in the lead and the number of conflicts, which could all be solved. While the number of requests decreased by 13% for TT2024, the number of conflicts stayed stable compared to TT2023 pinpointing an important bottleneck of the Corridor: the border crossing Bad Schandau - Děčín st.hr.



The graph below presents the comparison of the volume of PaP capacity offered, requested and pre-booked, where the C-OSS Manager of RFC NS-B was in the lead. The Rate of requested capacity and the KPI Ratio of pre-booked capacity are also shown on the graph.



Looking at the results more in detail, the PaP capacity requested increased slightly by 18% in comparison to TT2023 but shows a weaker growth than in 2022 with 70%.

The pre-booking volume of the PaP capacity TT2024 also shows a slight increase by 12%. Driven by the general economic downturn, the number of requests dropped but applicants ordered longer stretches of capacity which shows that the offer matched customers' needs. The reduced number of TCRs on the corridor lines as well as an increased number of harmonized PaPs (HaPs) with RFC ScanMed helped achieve this result.

The ratio of PaP capacity offered to PaP capacity requested (Rate of requested PaP capacity) reached 24% and the ratio of PaP capacity offered to PaP capacity pre-booked (KPI Ratio of

pre-booked PaP capacity) remained at 22%. The Ratio of pre-booked capacity is a new KPI published since TT2023. It was developed in order to display in a transparent manner the relation between the two mandatory KPIs required pursuant to the Framework for Capacity Allocation (FCA) which are the “Volume of Offered Capacity (PaPs)” and the “Volume of Pre-booked Capacity”. As of TT2024, the KPI Ratio of pre-booked PaP capacity is published officially. Data for previous years has been calculated retroactively for a better comparability.

For 40 dossiers out of 46, the Final Offer was not published on time. This also affected the Final Offer for RFC NS-B PaPs. DB Netz was forced to check all conflicts which was very time-consuming and further delayed the Final Offer. However, all requests reached the active timetable on time to conclude the contracts for the train run starting with the timetable change on 10<sup>th</sup> of December 2023.

### **2.1.2 Reserve Capacity**

Reserve Capacity (RC) on RFC NS-B is the capacity product for the running timetable to provide applicants with an internationally harmonized path offer for new traffic needs during the year. RC is offered as a guaranteed contingent of “capacity slots” for international freight paths per day, direction and section on RFC NS-B lines. For TT2023, RFC NS-B offered 4.2 million path kilometres and one slot per day and direction. The capacity contingent of RC is allocated on the “first come, first served” principle. The TT2023 catalogue for the RC slots was published on the 10<sup>th</sup> of October 2022. RC was not requested for TT2023.

### **2.1.3 Cooperation with other Corridors**

The extension of RFC Orient/East-Med (RFC OEM) to Germany in 2018 as required by the amended Regulation (EU) 913/2010 led to long overlapping sections with RFC NS-B. To optimize the usage of the scarce capacity in the bottleneck sections and to avoid negative competition between the corridors, a collaborative model was chosen to regulate the workflow of both C-OSS Managers. The C-OSS of RFC NS-B oversees the capacity offer north of Prague and Kolín, while the C-OSS of RFC OEM manages the capacity offer south of Prague and Kolín including the section Prague and Kolín. To enable this solution, an operational extension to Rostock and Kolín has been implemented.

Besides that, a PaP offer in cooperation with RFC ScanMed has been developed, which is reflected by the offer of Harmonized PaPs (HaPs). For TT2024, one path per direction was also aligned between RFC NS-B and RFC Rhine-Danube to ensure a smooth transition via Česká Třebová to and from Ostrava (RFC Rhine-Danube) and Halle (Saale) Gbf (RFC NS-B). Lastly, PaPs for RFC NS-B on ProRail and Infrabel network were published with involvement of RFC North-Sea Med and vice versa for a more global view on the flows at border points and better alternatives in case of conflict for customers.

## 2.2 UPDATE OF THE IMPLEMENTATION PLAN

In accordance with Article 9 of the Regulation, the Management Board updated the Implementation Plan of RFC NS-B in 2023. The document shows a picture of the developments in all fields of the Corridor since the previous update in 2021. Most Corridor WGs contributed to this update.

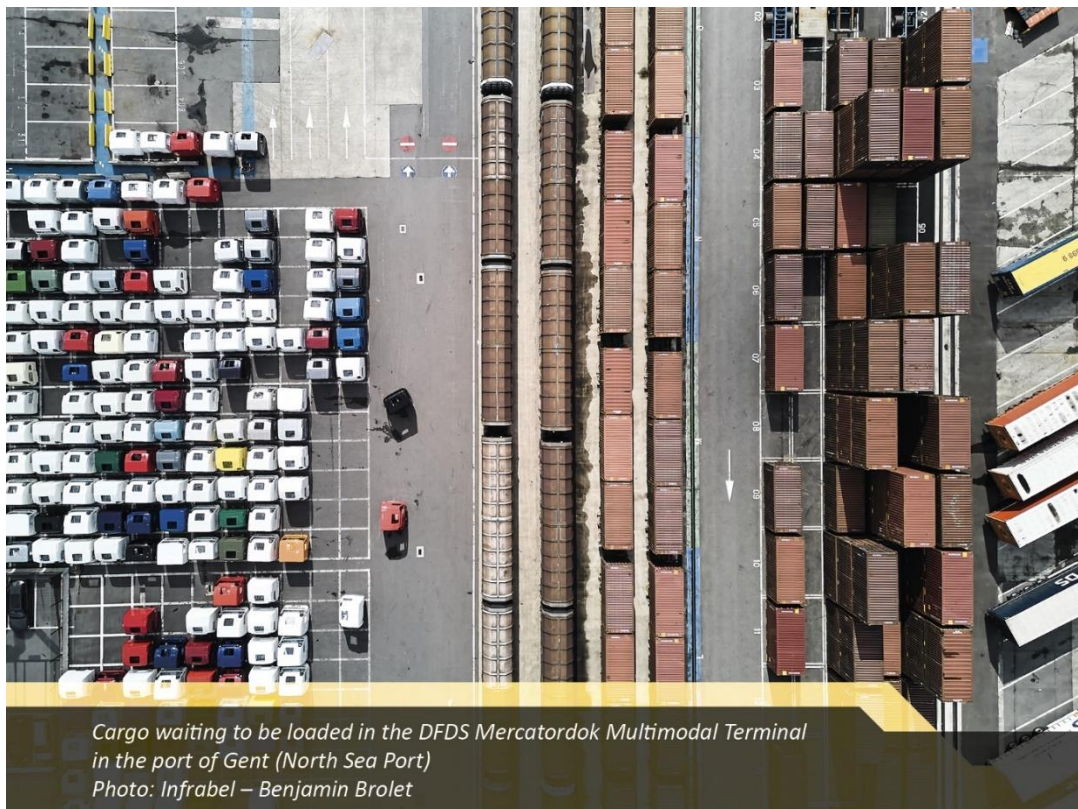
The main focus of the update was on the introduction of quantifiable targets for some objectives. The targets are based on the commitment of the stakeholders to sustainably strengthen quality and resilience on the Corridor as well as considering the current situation on the Corridor. In total, 4 objectives and their respective targets were defined for RFC NS-B:

- Delta between RFC Entry and RFC Exit punctuality
- KPI Number of trains crossing a border along the RFC
- Ratio of capacity requested
- KPI Average planned speed of PaPs.

The progress of these 4 objectives will be monitored in the Performance Report. The other parts that were updated include the investment plan, the capacity bottleneck analysis for the Corridor lines and the ERTMS deployment along the Corridor.

The Implementation Plan was also consulted with RAG/TAG and other relevant stakeholders.

Following the approval of the updated Implementation Plan by the ExBo in December 2023, it was published on the Corridor's [website](#) together with the approved decision.

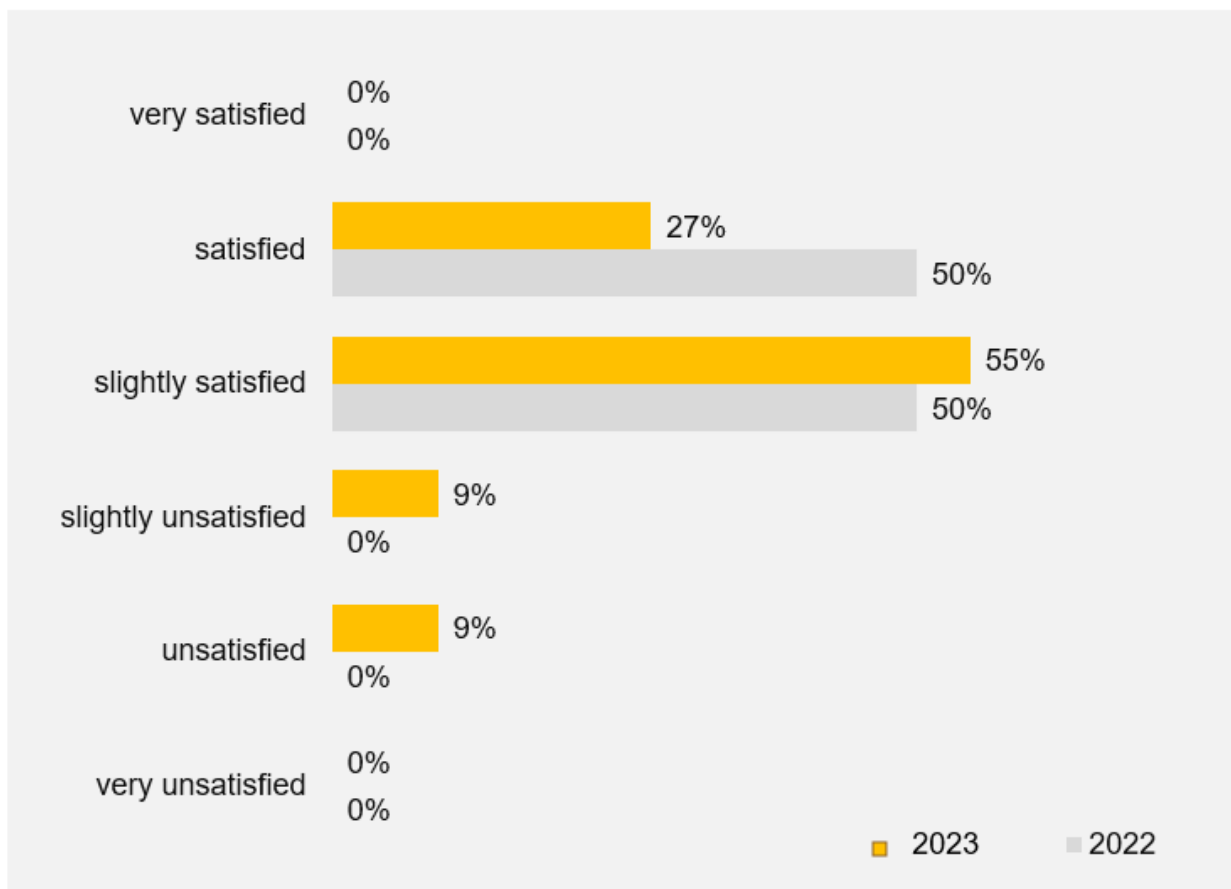


*Cargo waiting to be loaded in the DFDS Mercatordok Multimodal Terminal in the port of Gent (North Sea Port)  
Photo: Infrabel – Benjamin Brolet*

### 2.3 USER SATISFACTION SURVEY

In 2023, the Corridor conducted its User Satisfaction Survey (USS) under the RailNetEurope umbrella. The survey was improved and questions were adapted to focus on concrete proposals suggested by participants. Additionally, participants could also choose to be directly interviewed. Out of 30 invitations sent by and on behalf of RFC NS-B, 11 respondents (including 1 interview) took part in the survey.

The overall satisfaction with RFC NS-B was 82 %, meaning an 18% decrease in comparison to the previous year, where 100% was reached.



The customers were satisfied the most with the information provided by the RFC and again with the service by the C-OSS. The topic RFC NS-B should put more focus on is the temporary capacity restrictions. The full results of the 2023 USS can be found on the [Corridor's website](#). An RFC NS-B action plan was developed to address the issues raised by the respondents. The MB appreciates all the efforts participants put into completing the survey.

## 2.4 CORRIDOR PERFORMANCE

According to Article 19 (2) of the Regulation, the MB of RFC NS-B monitors the performance of rail freight services on the freight corridor and publishes the results of this monitoring once a year. In 2023, the Performance Report of RFC NS-B for the year 2022 was published on the [Corridor's website](#).

The full results for the year 2023 will be published in the first half of 2024, based on the commonly agreed KPIs as described in the RNE KPI Guidelines. Two of these KPIs are already shown below. The capacity management KPIs can be found in subchapter 2.1.

### Number of trains crossing a border along the RFC

This KPI displays the number of international freight trains running on RFC NS-B infrastructure, crossing at least one border on the Corridor, and passing at least one pair of points defined in the basic point list of RFC NS-B. The information used for the KPI is data first obtained from the Train Information System (TIS) that is then stored and processed at the RNE data warehouse for reporting use.

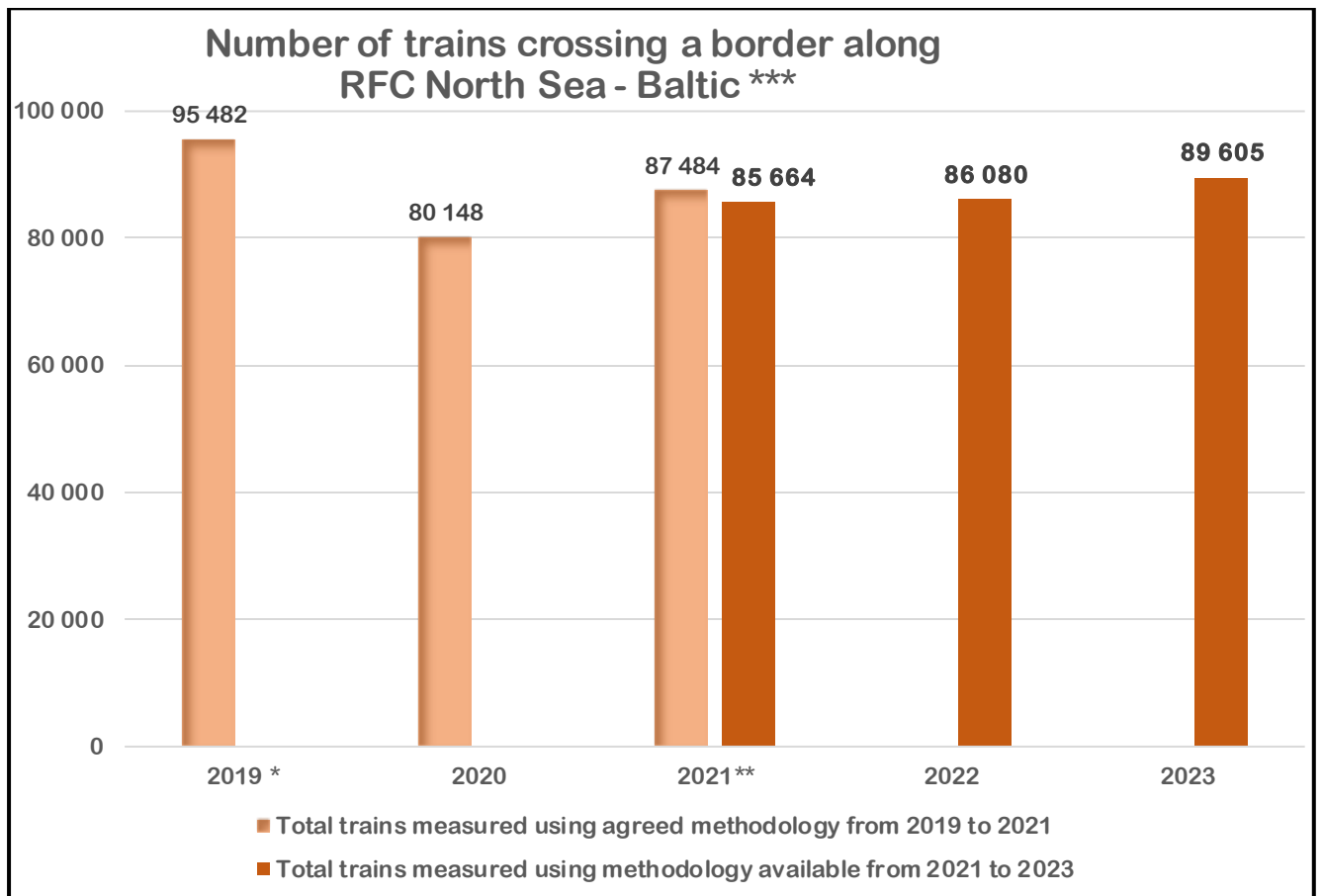
In the graph on page 24 below the different figures are shown for the last five years, the years 2019 and 2020 are shown with figures calculated using the old methodology. For 2021, there are two figures that show the difference using the old methodology compared to the new one and the old 2021 figures were also published. From 2022 onwards only the new methodology is used. **The total number of trains crossing a border along the RFC was 89.605 in 2023.**

Overall, the number of trains on the Corridor increased by 4.1 % compared to 2022 (+3525 trains). This can be explained by an increase in traffic at the Polish/Lithuanian border, due to an increase in trains coming from Ukraine transporting goods out of the country via Medyka and heading to the Polish/Lithuanian ports. On top of that, trains at the border crossing Sasvan-Gent/Zelzate are considered for the first time. Additionally, the PLK S.A. data gathered in 2023 in TIS has improved considerably (data quality) compared to 2022.

However, when looking further at the different border crossings along the Corridor, a more diverse picture can be seen. For most of the other Corridor borders (regrouped per country) the traffic volumes have decreased, except for the Belgian/German and the Czech/German border. These show a slight increase, although this is probably not a true increase but likely a normalisation after last year's track closures because of TCRs. In general, the current economic situation in Europe, that is also reflected in a drop in the volumes handled in the major ports in the western part of the Corridor, had a negative impact on the Corridor traffic. Other important factors impacting the traffic were strikes, works and the re-routing of trains as well as RUs issues regarding staff and material shortage.

Furthermore, the drop at the German/Polish border was also impacted by the works at Frankfurt (Oder) Oderbrücke/Rzepin in December and the drop at the Dutch/German border Zevenaar/Emmerich was impacted by the works between Emmerich and Oberhausen. Some trains were re-routed via Oldenzaal/Bad Bentheim, but most of them were re-routed via Venlo (which is not taken into consideration in the graph) and although the two other border pairs absorbed most of the traffic, in total there was a decrease at the Dutch/German borders.

The Baltic States too have generally seen decreases in train totals, however, for Lithuania there is an increase at the border with Poland (Mockava/Trakizski) and this is positive news. For the Lithuanian -Polish border the figures are taken from the Polish side only as Lithuania does not yet produce TIS data. The same applies for all borders between Estonia and Latvia and Latvia and Lithuania and hence the number of trains are not included in the graph.



\* 2019 figures are based on timetable year (mid Dec-mid Dec). Figures from 2020 onwards are based on calendar year.

\*\* From 2021 the figures no longer include trains from Venlo-Kaldenkirchen as these no longer belong to RFC North Sea-Baltic

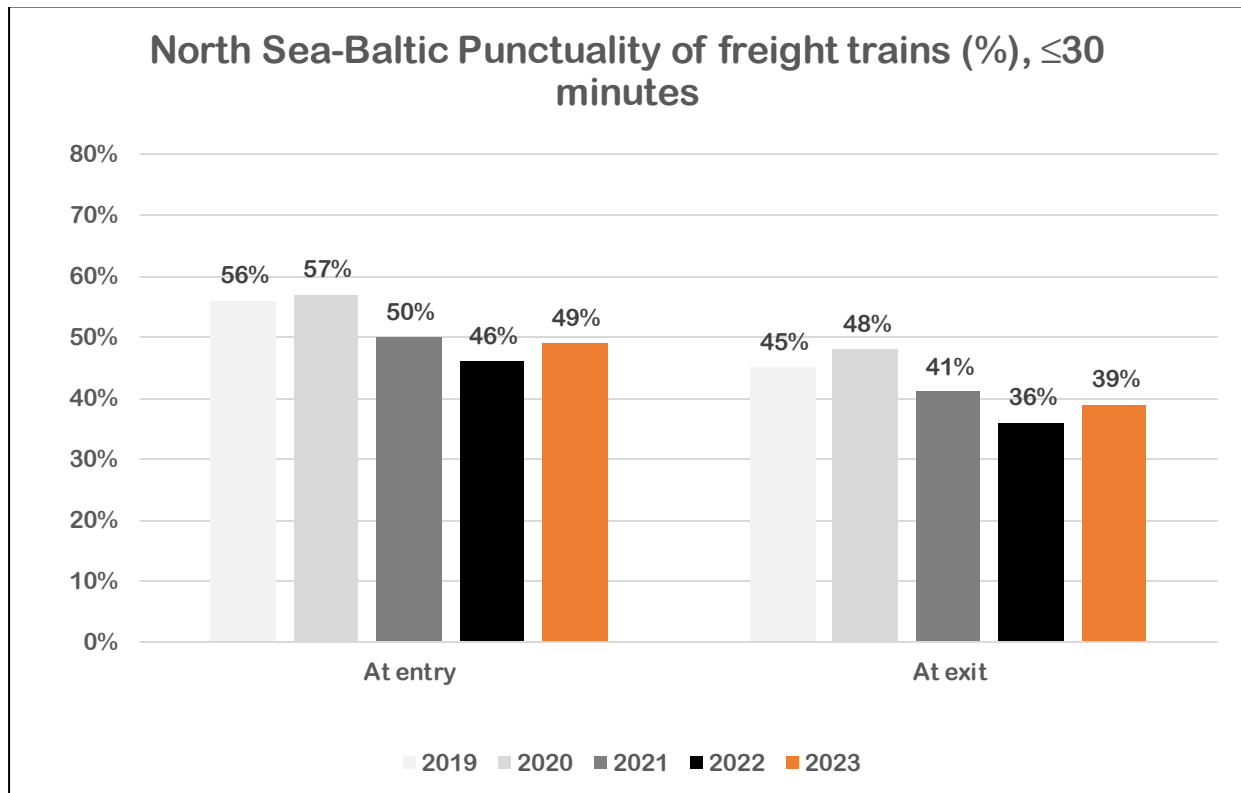
\*\*\* Figures are not shown in the graph for Estonia, Latvia, and the Lithuanian border with Latvia as these three IMs are not yet using TIS and there is no data available

### Punctuality (at origin/destination)

This KPI shows the average punctuality of trains running on the Corridor at entry and exit of the Corridor (or origin/destination if this is a point on the Corridor). A train is considered as punctual when it has a delay of ≤30minutes. Calculation is based on the data from the Train Information System.



**Punctuality for 2023 at entry is 49% and at exit 39%. Average overall punctuality is 44%.**



The 2023 punctuality figures are reflecting a slight increase at entry and at exit (both +3%) compared to 2022, but the delta between entry and exit punctuality remained the same at 10%.

More detailed information regarding the delay reasons specifically on each IM’s network can be found here below under “General comments on punctuality”.

RFC NS-B also publishes [Monthly Punctuality Reports](#) on the Corridor’s website. Information can be found here on the punctuality development for a period of 12 months, accompanied by the amount of delay minutes and the distribution of delays. These reports are a good base to use at bilateral discussions held with the customers regarding the measures needed for the improvement of the performance.

**General comments on punctuality**

The information on punctuality in the countries along the Corridor is given per IM in geographical order beginning from the West of the Corridor.

**The Netherlands**

In 2023 multiple factors influenced the Corridor punctuality on the Dutch network. There were several long periods of total closure of the German railway line between Emmerich and

Oberhausen which resulted in re-routing of trains in the Netherlands. Freight trains heading to and from Germany during these periods were re-routed via the border stations at Oldenzaal and Venlo (not an NS-B border). The additional trains increased strain on the already congested network which led to delays and decreased punctuality. These routes already see a high volume of freight and passenger traffic and because of this they have historically lower freight train punctuality compared to the designated Betuweroute. Throughout the year, in addition to the re-routing issues, there were a few infrastructure concerns, the most important of which was track instability. All trains on these stretches were subject to temporary speed restrictions which led to delays. The track was shut down for several weeks for rebuilding which resulted in further re-routings and cancellations.

### **Belgium**

Most delays on the Infrabel network were caused by single incidents: delays from the neighbouring IMs, exceptional weather (storm Ciarán.) and incidents involving a person. Despite multiple measures being implemented to prevent the last one, these incidents still cause a lot of delays. Other causes with a big impact on the punctuality figures were breakdown of rolling stock and mistakes by staff. The discovery of two suspicious packages led to the closure of Antwerp Central station and partial closure of lines surrounding Antwerp, causing delay to the freight traffic. Miscommunication regarding the rules of exceptional transport in combination with the breakdown of a train on the other track resulted in the closure of the Aachen-Montzen border point for several hours. Measures were taken to avoid this in the future.

### **Germany**

In 2023, the network had an exceptionally high volume of construction and maintenance works which led to multiple delays. High impact construction works in the Elbe Valley (February, August, October, November), Frankfurt (Oder) Oderbrücke (December) and Aachen (March, July) along with storms (June, July, December) and strikes (in March and April and November /December) had a major impact on traffic on RFC NS-B. Furthermore, major disruptions like the train derailment in Frankfurt (Oder) Oderbrücke in January, the overhead line failure in the Hannover area in February, and a vehicle fire in the Hannover area in September have caused several days' worth of disturbances to operations.

### **Czech Republic**

The punctuality on the SZCZ network in 2023 was highly influenced by capacity restrictions due to reconstruction works on the network, particularly the extremely limited capacity resulting from works in the Elbe Valley during specific months of the year. Another main delay reason is the formation of trains by railway undertakings at origin (late train ready message at origin, handover at origin, loading issues, late loading). Less important factors influencing the Corridor's punctuality are rolling stock issues, bad weather conditions, maintenance-related capacity limits and infrastructural breakdowns.

## **Poland**

There were no specific delays pertaining to freight traffic in 2023 on the PLK S.A. network for the RFC NS-B railway lines. Rail freight punctuality remained unchanged from 2022, with the average punctuality staying around the same as in previous years. The primary causes of delays for international freight traffic on the network were rolling stock failure, occupied station tracks, transferring rolling stock to another train and late notification of readiness for departure. PLK S.A. as infrastructure manager was responsible for some minor delays, mainly related to the emergency closure of route or station tracks.

## **Lithuania**

In 2023, Lithuania's railway punctuality showed a notable improvement, with no major incidents reported. However, the electrification project on one of the main lines has resulted in minor delays. During October and November, reconstruction works also led to slight delays due to the occupancy of station tracks, subsequently extending the travel time for cargo.

The busiest border section on the RFC concerning Lithuania is Mockava – Trakiszi. Compared to 2022, traffic in this section has seen an increase, and punctuality remains acceptable. Nonetheless, there have been occasional planning issues with one of the neighbouring Infrastructure Managers, Furthermore, delays in passenger trains crossing this border have also impacted freight traffic.

The Joniškis – Meitene border has maintained good punctuality, with a slight decrease in freight train traffic since 2022. The Turmantas – Kurcums border has very little traffic so punctuality in 2023 is not impacted.

## **Latvia**

There were no big problems with train punctuality at the Latvian railway's border sections. These sections have sufficient spare capacity and in many cases the trains run on actual time (dispatchers command) therefore train delays do not happen often. On the Latvian railway network in 2023 there were no significant accidents which could have noticeably impacted the train traffic.

At the same time, it is not possible to say that there were no train delays at all on the Latvian railway. At the Lugazi-Valga section there were about 10% delayed freight trains, and the most common causes of delay were locomotive malfunctions, late delivery of locomotive and slow driving. There were also several cases related to weather conditions.

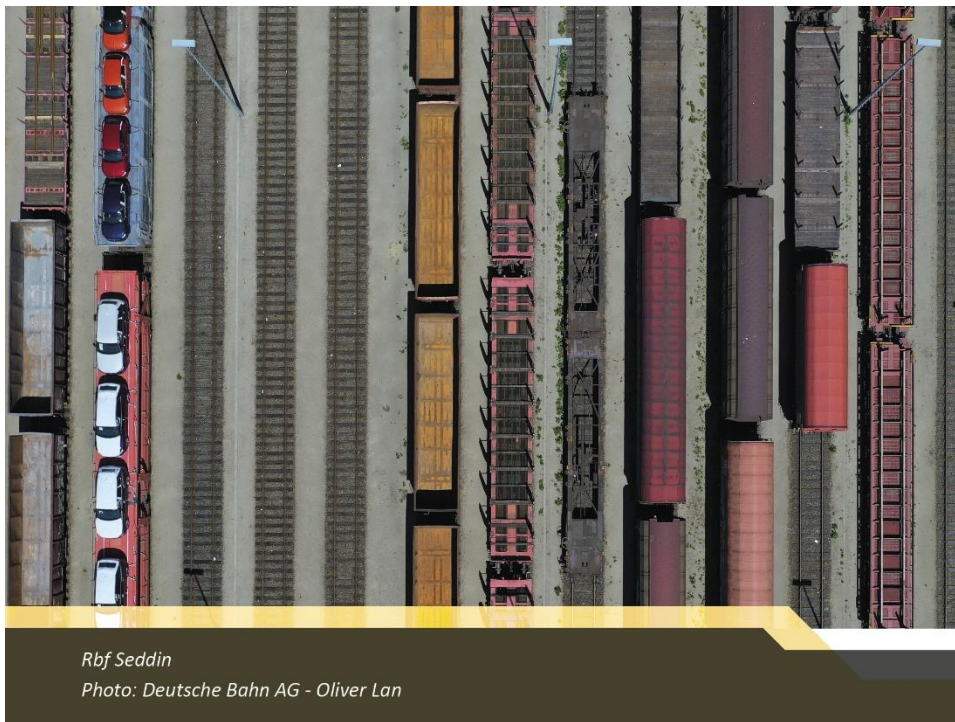
At the Joniškis–Meitenē section the trains run mostly on ad-hoc basis and there were only 2 or 3 trains a day with only two cases of delay in 2023. At the Turmantas–Kurcums section only one train pair ran during 2023 and this was a trial train transporting woodchip.

## **Estonia**

In 2023, the volume of freight traffic on the Estonian Railway network has decreased by 39% compared to the previous year due to the changed external political, economic and legal environment. The cross-border traffic at the Valga-Lugazi border station remained stable at relatively low level (in average 1,3 train pairs per day).

Overall, there are no big problems with punctuality at the Valga-Lugazi border or in the Estonian public network in a broader sense as most of the sections and border stations have

plenty of free capacity. The biggest cause of delay of freight trains on the Valga-Lugazi border was due to technical failure or breakdowns of vehicles. Secondly, a few freight trains were late because the passenger trains always have priority in traffic. Despite these minor issues, the overall punctuality of both passenger and freight trains in Estonia was above 99% in 2023.



## 2.5 CROSS-BORDER PROJECTS

The main goals of the Quality Circle Operation (QCO) projects are:

- More efficient use of capacity and infrastructure
- Reduction of dwell times and delays
- More train path capacity, an optimised use of resources of trainsets, drivers and wagons as well as an optimised and more reliable running time of the train.

RFC NS-B continued the work on the cross-border improvements through the QCO project for the Frankfurt (Oder) Oderbrücke, Bad Bentheim, Montzen-Aachen and Bad Schandau – Děčín borders, implementing several measures in 2023.

The QCOs Task force team members meet every month to improve the communication at the border Frankfurt (Oder) Oderbrücke and monitor the implementation of the check-in process of the advance train information to the dispatcher at the border. This process has been consulted with all stakeholders involved.

Furthermore, the implementation of the check-in process in Bad Bentheim, drafted in May 2022, continued. The pilot phase was extended to May 2023 and analysis of the first results took place showing the strong support and approval by the RUs for the procedure. Additionally, the decision upon the implementation of the procedure as well as the legal audit was done in June 2023.

Simultaneously, investments on the Polish/Ukrainian border were ongoing in 2023. PLK S.A. took a number of actions to ensure capacity for passengers and freight trains coming to the Polish territory also under the Solidarity Lanes initiative (see chapter 2.6). Further increasing the capacity of rail border crossings between Poland and Ukraine was one of the most important challenges. In-depth analysis was carried out in cooperation with the Ukrainian Railways and carriers to develop optimal solutions for improving the capacity at border crossings as well as the technical conditions and parameters of the railway lines leading to them. Furthermore, the investment projects will also include reloading terminals on both sides of the border, facilitating the development of the railway lines.



*Dorohusk railway bridge  
Photo: PLK S.A.*

## **2.6 SOLIDARITY LANES - INFLUENCE OF THE UKRAINIAN CONFLICT ON RAIL FREIGHT CORRIDOR NORTH SEA - BALTIC**

The EU-Ukraine Solidarity Lanes were established in 2022 as alternative logistics routes to mitigate the blockade of the Ukrainian Black Sea ports, enabling the flow of goods between the EU and Ukraine. This successful initiative continued in 2023 and facilitated Ukraine's

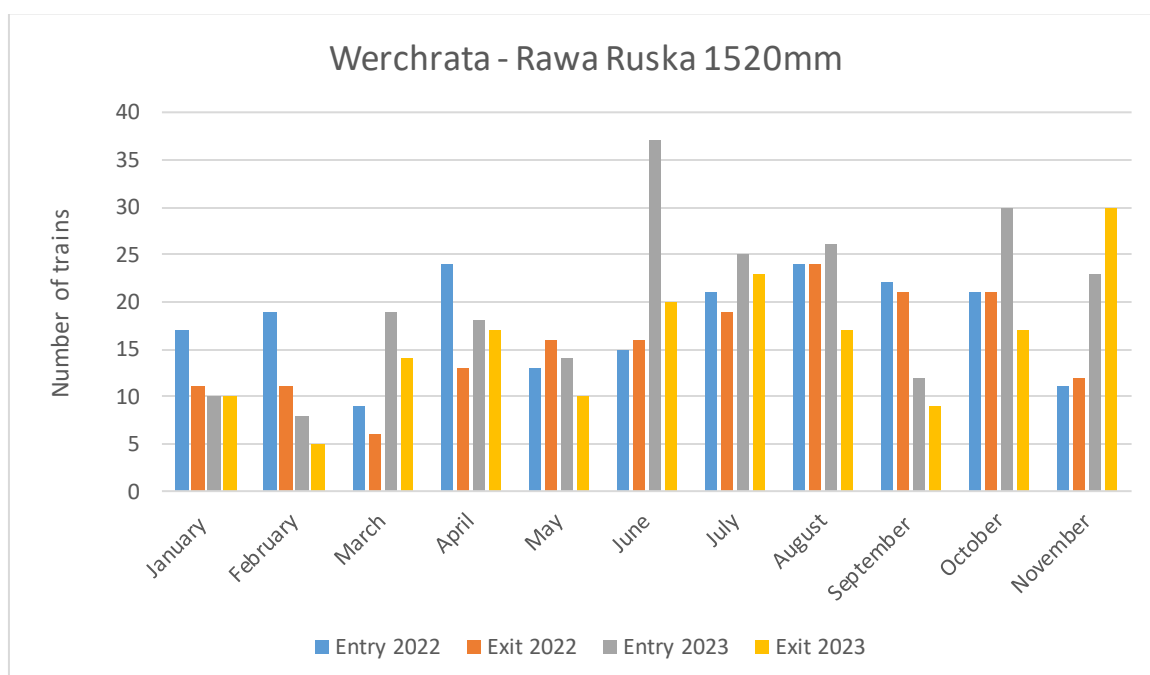
agricultural export and trade with the EU, which were severely impacted by Russia's aggression.

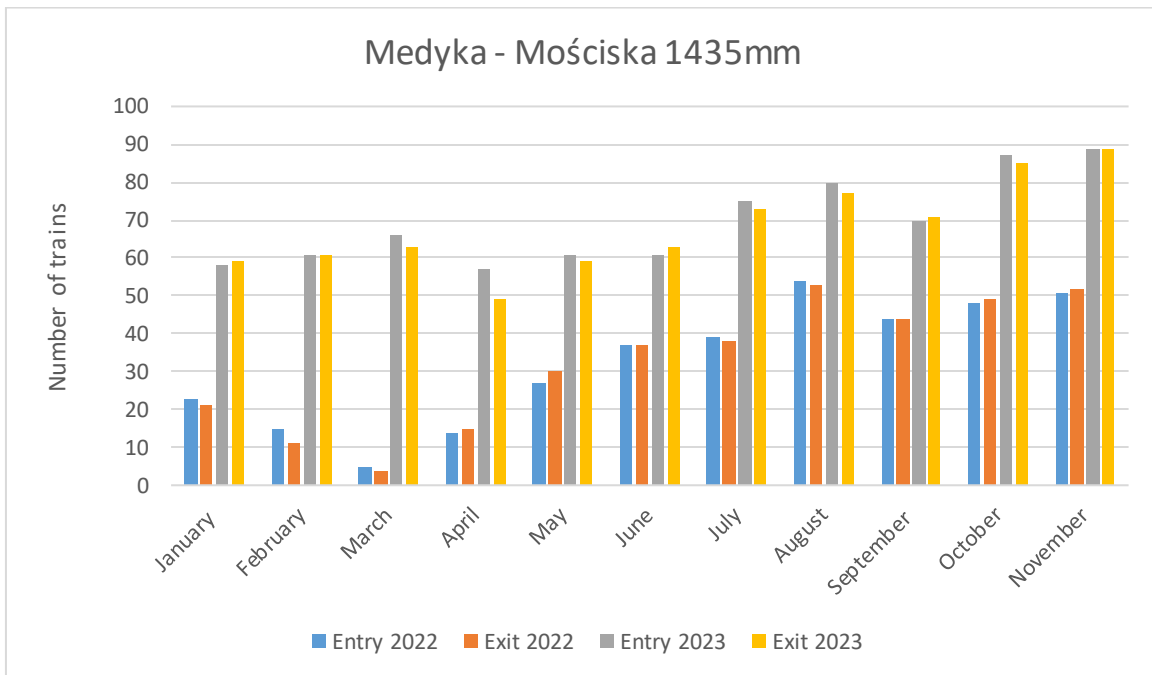
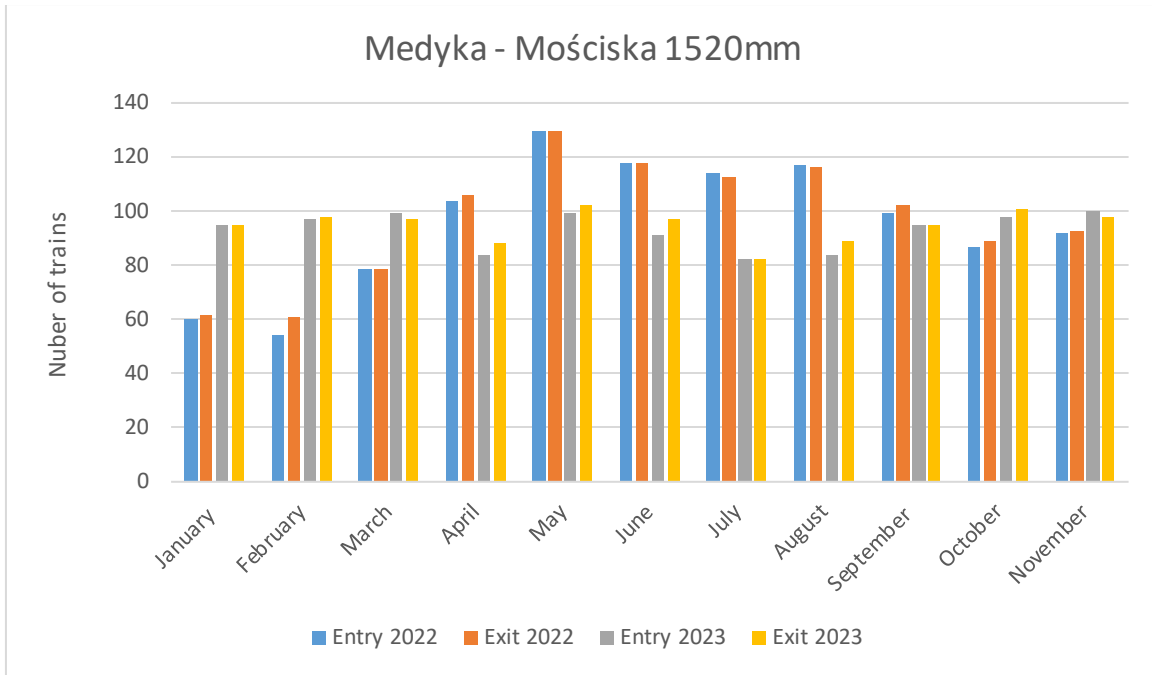
Additionally, the Black Sea Grain Initiative, vital for Ukrainian grain exports, was discontinued by the Russian Federation. Solidarity Lanes still focus on operational plans to increase transport capacity, minimize checks, disseminate transit procedures guidance and reduce waiting times at border control posts.

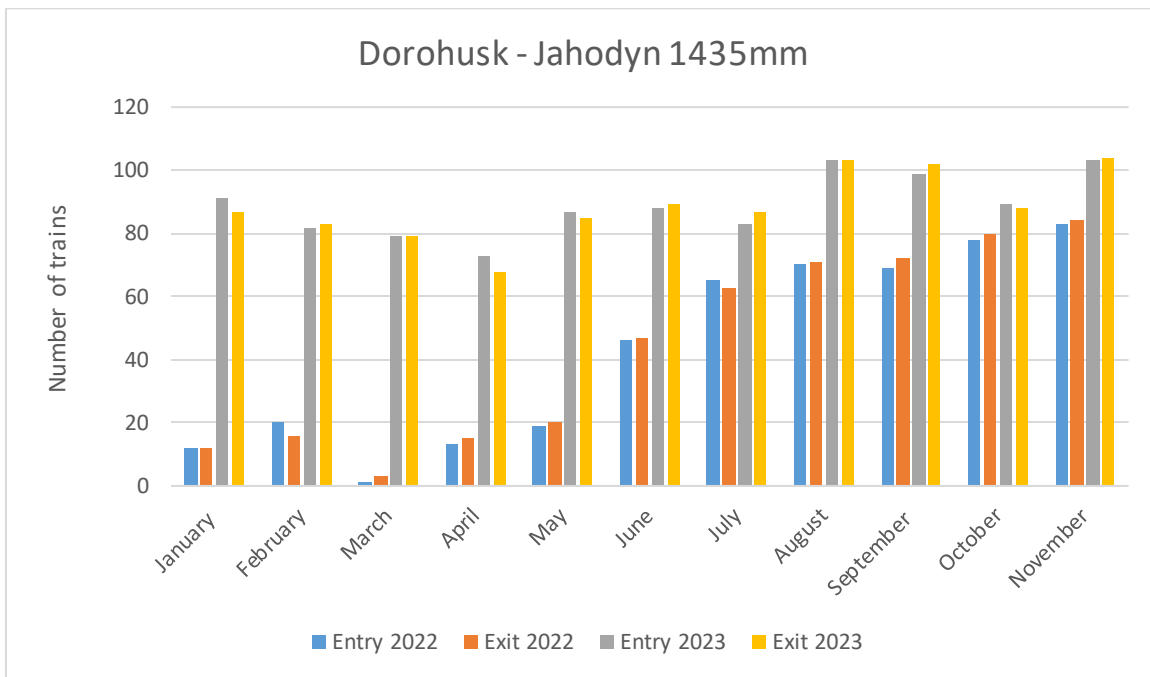
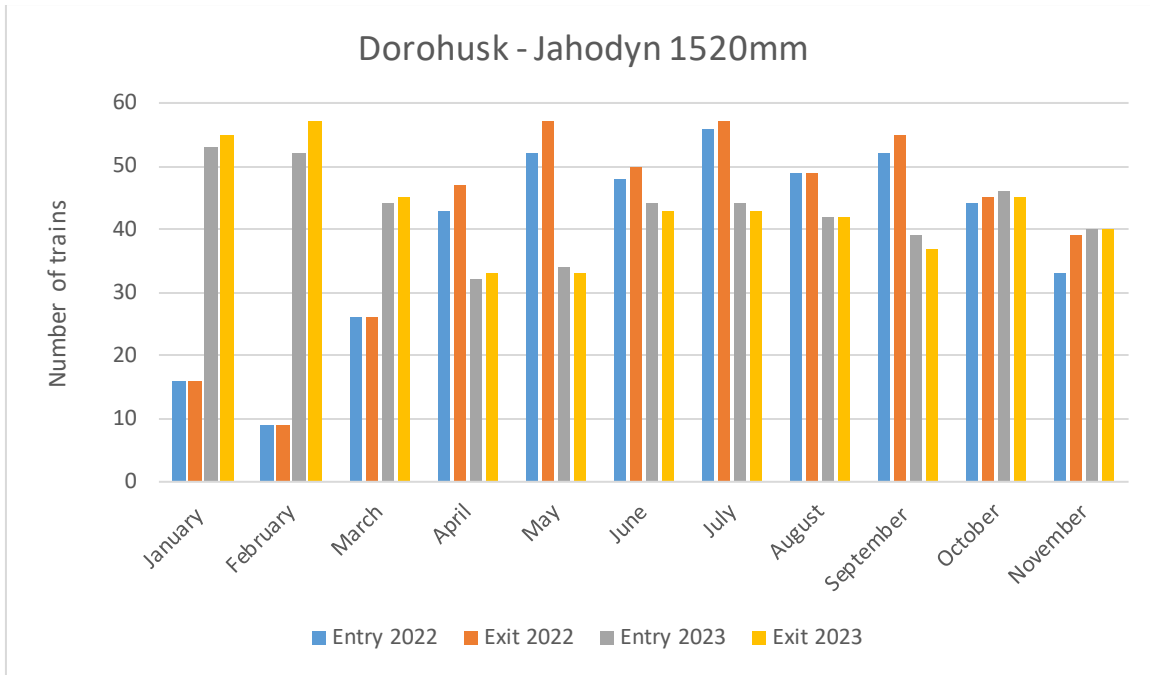
Uninterrupted flows of trade between the EU and Ukraine, particularly focusing on facilitating Ukraine's agricultural exports and bilateral trade, remains the primary goal of the EU-Ukraine Solidarity Lanes. So far:

- alternative logistics routes have been established;
- coordinated efforts led to enhanced trade flows;
- operational efficiency at border crossings has been improved.

The graphs below provide a detailed comparison of the number of trains at five rail border crossing points between Poland and Ukraine, covering the period from January 2023 to November 2023. They include information on the number of trains crossing each month for both entry and exit directions, distinguished between different rail gauges (1435mm and 1520mm) at these border crossing points. Overall, the data offers insights into transportation volumes, trade dynamics, and infrastructure utilization between Poland and Ukraine.







The data provided, sourced from PLK S.A., holds particular significance as Poland, a bordering nation to Ukraine, plays a pivotal role in the implementation of the Solidarity Lanes. Directly involved in this endeavour, PLK S.A. has diligently collected and shared this dataset with relevant stakeholders, including RNE and the European Commission. This information serves as a crucial source for stakeholders involved in transportation planning, trade analysis and cross-border cooperation initiatives.





*Medyka – double track line  
Photo PLK S.A.*

## 2.7 EVENTS

### 2.7.1 Transport Logistic Fair

RFC NS-B together with the RFC Network and RailNetEurope (RNE) participated in the Transport logistic fair, which took place between the 9<sup>th</sup> and 12<sup>th</sup> of May 2023 in Munich. The RFCs and RNE shared a common stand in the exhibition hall.



*RFC Network and RNE common stand  
Photo: RFC NS-B Office*

It was a great opportunity to get in contact with potential customers opening new possibilities for partnerships and cooperation. RFC NS-B was represented by Management Board

members, Project Implementation Managers, the Managing Director and the C-OSS Manager, who used this opportunity to discuss the RFC's activities on international contingency management, performance management, cross-border interoperability and capacity offer with the existing and potential customers.

### **2.7.2 Joint Event on Synergy Projects in Transport, Energy and Digital Networks**

The Managing Director of RFC NS-B participated in the joint event that was organized by the European Coordinators of the North Sea-Baltic, North Sea-Mediterranean and Rhine-Alpine Core Network Corridors in Amsterdam on the 11<sup>th</sup> and 12<sup>th</sup> of May. The event covered three topics:

- Setting the scene and the policy framework for synergy projects;
- Focus on infrastructure with synergetic elements;
- The future opportunities for synergy projects.

The meeting was a great opportunity to discuss these potential synergies between the energy, transport and digital sectors and where they can act as an accelerator for the green transition.



*Joint Event on Synergy Projects in Transport, Energy and Digital Networks  
Photo: RFC NS-B Office*

### **2.7.3 Rail Transport Day**

The Rail Transport Day 2023, co-organised by the European Commission, RailNetEurope, Trafikverket and Europe's Rail Joint Undertaking took place on 30<sup>th</sup> of May 2023 in Stockholm, Sweden. The Rail Transport Day 2023 was hosted as a hybrid event, allowing for participants to follow the discussions and contribute online.



The Rail Transport Day 2023 provided a platform for debate on the rail sector. The conference was divided in four sessions concerning among others following topics: a rail users' perspective and needs, rail as a part of the logistic chain, seamless rail ticketing, optimization of rail capacity management and Digital Railway Systems.

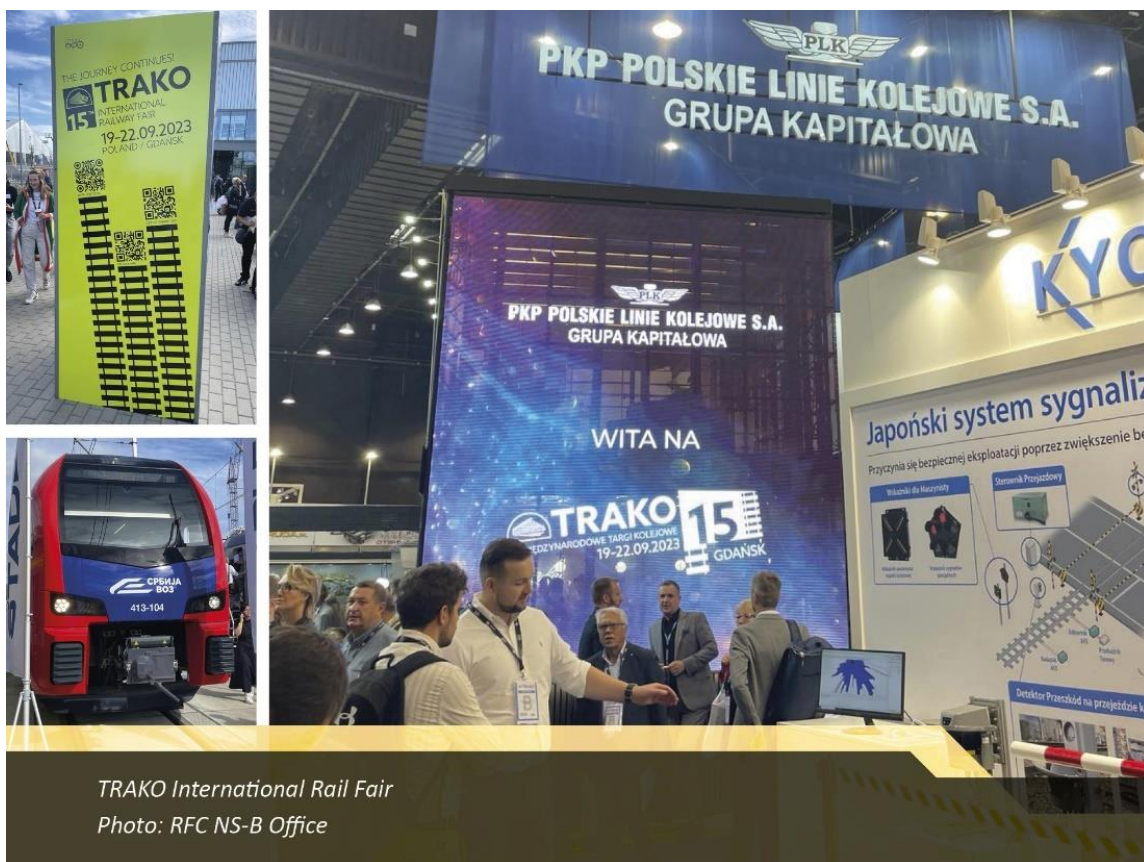


The videos, presentations and conclusions of the Rail Transport Day 2023 can be found on the [Rail Transport Day website](#).

#### 2.7.4 TRAKO International Rail Fair

RFC NS-B participated in the TRAKO International Rail Fair which took place on the 19<sup>th</sup> – 22<sup>nd</sup> of September 2023 in Gdańsk, the largest and most prestigious rail industry meeting in Poland and one of the largest in Central and Eastern Europe. Moreover, representatives of the Infrastructure Managers involved in RFC NS-B namely: PLK S.A., Správa železnic and LTG Infra took part as panellists in the International Conference: The Role of Rail Transport and Infrastructure Managers in the Face of the Challenges of the Modern World organised in the frame of the fair by PKP Polskie Linie Kolejowe S.A. The conference was divided into two sessions:

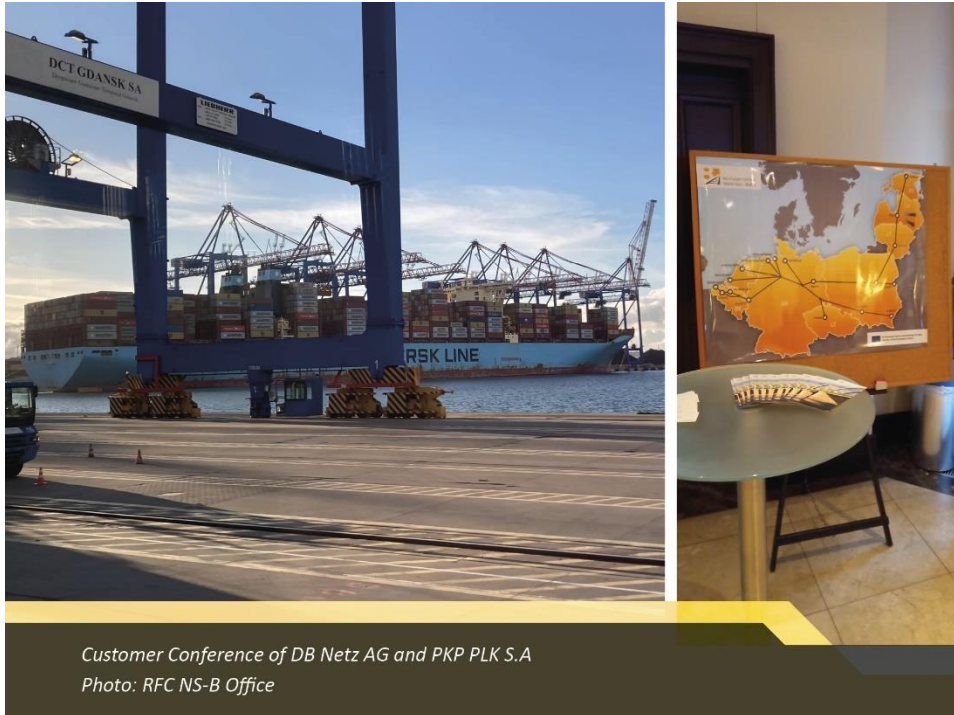
- Session 1: Opportunities and challenges for Infrastructure Managers
- Session 2: Transport potential of railway corridors in North-Eastern Europe



TRAKO International Rail Fair  
Photo: RFC NS-B Office

#### 2.7.5 Customer Conference of DB Netz AG and PLK S.A

The 13th Customer Conference of DB Netz AG and PLK S.A. took place on 18<sup>th</sup> – 19<sup>th</sup> of October 2023 in Gdańsk. On the first day, participants visited the Baltic hub and the newly built rail infrastructure of PLK S.A. at the port entrance.



The presentations on the second day revolved around topics such as current and future construction works on both sides of the Polish-German border as well as the influence of the Russian invasion of Ukraine on the Polish rail traffic. One focus topic was the border crossing Horka - Węgliniec where remaining operational hurdles will be tackled in the QCO Frankfurt (Oder) Oderbrücke going forward. At the RFC NS-B stand, participants of the conference had the opportunity to obtain detailed information regarding the Corridor offer.

### 3. COOPERATION WITH OTHER STAKEHOLDERS

#### 3.1 RAILNETEUROPE

RFC NS-B is an associate member of RNE and continued to cooperate closely with other RFCs in view of the harmonization and development of services under the RNE umbrella.

In 2023 RNE announced and conducted a tender aimed at selecting a contractor to conduct the update of the TMS for all RFCs (see chapter 5.2).

RFC NS-B applies RNE services and guidelines as well as the RNE IT tools, such as PCS, TIS, CIP, Network and Corridor Information (NCI) System and Charging Information System (CIS). In 2023, RFC NS-B representatives participated in two RNE General Assembly meetings and two RFC/RNE High Level Meetings. RFC NS-B was also actively engaged in a number of RNE initiatives and participated in Working Groups:

- Further harmonisation and digitalization of the Customer Information Document (CID);
- Further development of PCS;
- Improvement of traffic and train performance management;
- Participation and coordination of the USS;
- Railway Infrastructure System project (RIS);
- Further development of CIP and work on including CIP in RIS;

- Development and improvement of the NCI;
- Participation in the NS&CID working Group;
- Participation in the RNE/RFC KPI Coordination Working Group;
- Update of the International Contingency Management Handbook 2023-2024.

### **3.1.1 Customer Information Platform**

The [Customer Information Platform](#) is an interactive, Internet-based tool, which provides customers and users of the Corridor with information on railway infrastructure in 26 European countries, covering the complete network of all 11 RFCs. In 2023, RNE continued work on the development of the digital Railway Infrastructure System (RIS) (see chapter 3.1.2); therefore, it was decided to freeze bigger CIP developments with regard to this project. However, as in previous years RFC NS-B together with other RFCs under coordination of RNE was working on the development of the existing and new functionalities in CIP. Minor developments were also implemented for usability purposes. More information regarding CIP can be found on [RNE CIP information subpage](#).

### **3.1.2 Railway Infrastructure System project**

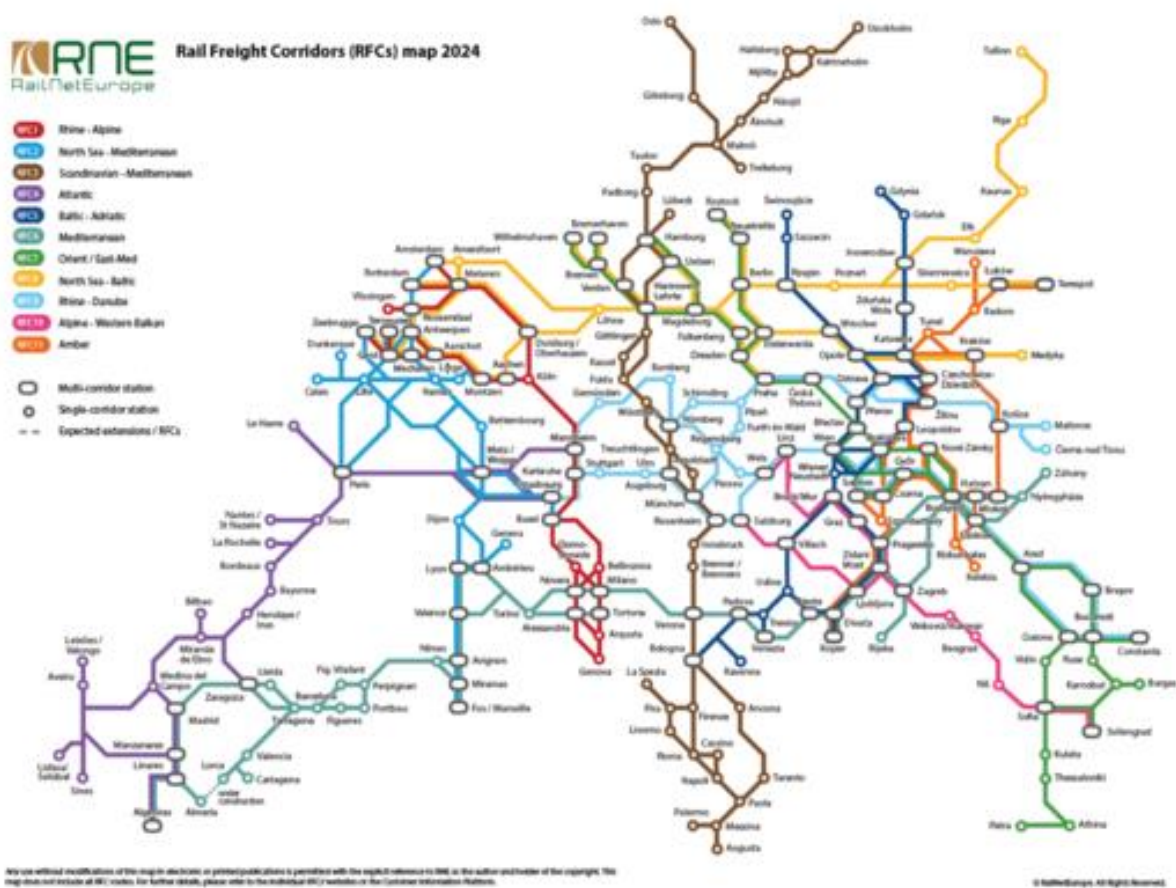
In 2023, RNE and RFC representatives continued developing the Railway Infrastructure System (RIS) in order to substitute several existing systems by merging their data and functionality into one consistent entity, lowering operational and managing costs. It is foreseen that RIS will be operational in the first semester of 2024.

### **3.1.3 Network and Corridor Information System**

In 2023, RFCs and IMs under the RNE umbrella continued work on the [Network and Corridor Information System](#) (NCI), which is a free of charge, digital solution to provide information on Network Statements and Corridor Information Documents. The latest developments are the introduction of functionalities aimed at facilitating customers' business activities. The website interface can be changed to six different languages, the search results can be downloaded as one document, notifications regarding changes in documents can be requested and interactive links can be created. Further developments and improvements to the platform are envisaged for 2024.

## **3.2 RFC NETWORK**

The RFC Network is a platform for cooperation of all 11 Rail Freight Corridors. It consists of the Managing Directors and Chairpersons of the Management Board of the RFCs with RNE representatives invited to participate as observers. The RFC Network is supported by the RFC Network Assistant, Nuria Pérez Brandón. In 2023, three online and two physical RFC Network meetings were organized in which RFC NS-B participated. Among the topics, that RFCs worked on were the CEF - Technical Assistance deliverables. Other topics that were continued were the EU-Ukraine Solidarity Lanes and further harmonization of common activities. The C-OSS Community topics were also discussed. In 2023, the RFC Network continued to work on joint RFC Network projects to be performed in the coming years with the support of EU funding. RFC NS-B representatives have been involved in the elaboration of several projects, among others the European TMS Project and the User Satisfaction Survey.



### 3.2.1 Joint Meeting RFC Network – ECCO

The joint meeting of the RFC Network and ECCO (Efficient Cross Corridor Organisation) which brings together RAG speakers from all RFCs took place on the 24<sup>th</sup> of October 2023 in Vienna. The participants discussed:

- Railway Undertaking Market Trends;
- Update of the RNE International Contingency Management (ICM) Handbook and alignment with the ICM Handbook of the Railway undertakings;
- Corridor platforms for new infrastructure projects (best practices following the example of Brenner Corridor Platform and Fehmarnbelt platform);
- Late approval of the capacity offer in Germany;
- New work relations considering the proposed new TEN-T and capacity management Regulations.

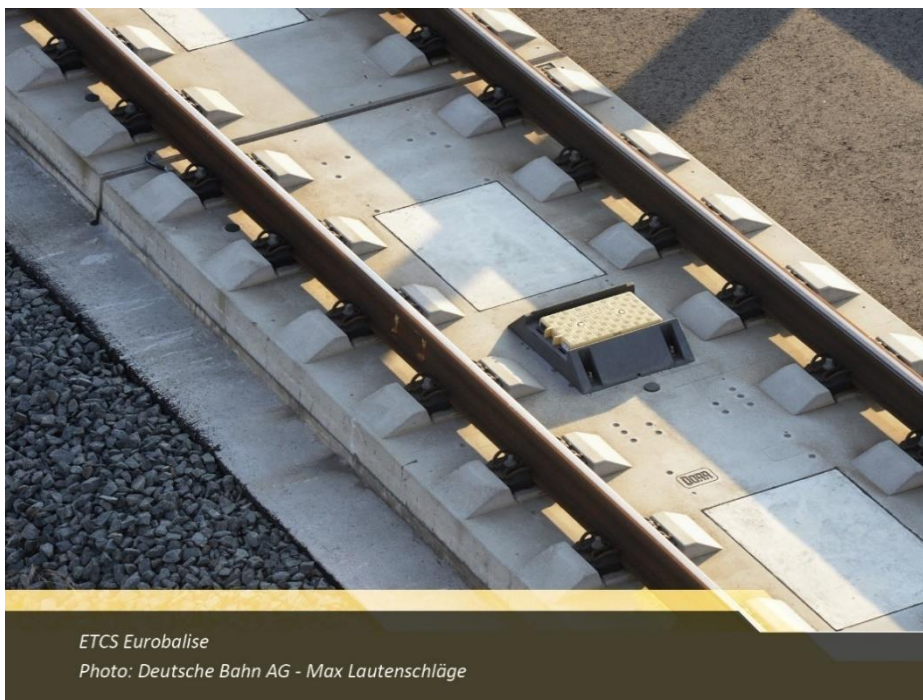
Additionally, it was decided to organise a similar meeting with all TAG Speakers and the RFC Network.

### 3.3 DG MOBILITY AND TRANSPORT

In 2023, the SERAC (Single European Railway Area Committee) was replaced by SERAF (Single European Railway Area Forum). Two online SERAF meetings took place on 4<sup>th</sup> of May and on 4<sup>th</sup> of October. The participants discussed:

- Commission initiative to better manage and coordinate European rail capacity and traffic management;
- Commission initiative on Multimodal Digital Mobility Services (MDMS);
- Commission support to cross-border long-distance passenger pilot services;
- EU – Ukraine Solidarity lanes;
- Guidelines on track access charges;
- Updates on international rail matters;
- Regional Rail Strategy in the Western Balkans;
- Ongoing / planned studies ordered by the Commission;
- Commission guidelines on Track Access Charges;
- Proposal for a Regulation on the accounting of greenhouse gas emissions of transport services ('CountEmissions EU').

Additionally, the Rules of Procedure of SERAF were approved and the SERAF subgroups were created.



#### **4. NORTH SEA-BALTIC CORE NETWORK CORRIDOR**

RFC NS-B continued to work with the European Coordinator of its corresponding North Sea-Baltic Core Network Corridor (CNC) in the framework of the model for cooperation between Rail Freight Corridors and TEN-T Core Network Corridors. This model ensures the achievement of the objectives of both the RFCs and CNCs and avoiding duplication of work through effective exchanges of information and consultations.

The North Sea-Baltic CNC Forum met twice in 2023. On 7<sup>th</sup> of June 2023, the main subject discussed was the TEN-T revision status. Among other topics that were dealt with were the resilience of the TEN-T network and an exchange of views on the future CEF III. Additionally,



the Managing Director of RFC NS-B presented the role and activities of the Rail Freight Corridor.

On 15<sup>th</sup> of November 2023, a further state of play of the discussions regarding the TEN-T revision was given. Additionally, the importance of military mobility was highlighted presenting the next steps as well as improving connections of the EU with neighbouring countries and the decarbonisation of transport.



## 5. OUTLOOK 2024

### 5.1 TEN-T REVISION

The new TEN-T Regulation will be officially approved and published in 2024, as a result of which new challenges will arise for RFC NS-B to implement this Regulation, especially the adaptation of the new governance structure with the integration of the new members (Finland, Sweden and Ukraine) and the withdrawal of the Czech Republic, that will no longer be part of the new Corridor.

Cooperation with the Advisory Groups will have to be reviewed to take into account their enlarged role.

The cooperation with the European Coordinator will also have to be strengthened following the integration of the RFC and the CNC into the new European Transport Corridor (ETC), as well as with other ETCs given the many overlapping sections.

The impact of the proposal on RFC NS-B will be further analyzed in 2024.

The map below presents the passenger and freight railway lines of the proposed European Transport Corridor North Sea - Baltic.



Source: TENtec Interactive Map Viewer: <https://ec.europa.eu/transport/infrastructure/tentec/tentec-portal/map/maps.html>

## 5.2 TRANSPORT MARKET STUDY

According to the Regulation (EU) 913/2010, the MB has to regularly update the Transport Market Study (TMS) to investigate the observed and expected changes of the traffic on the Corridor.


In order to keep the study coherent and comparable across the RFC Network, the decision was taken to use the same methodology for all RFCs.

The TMS update aims at providing a comprehensive understanding of the rail freight market. It intends to analyze infrastructural, organizational, operational and legislative factors

affecting rail competitiveness and provide a prognosis for 2030. The final report is expected till the end of 2024.



*Weiche Berlin Südkreuz  
Photo: Deutsche Bahn AG - Volker Emersleben*



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