



Rail Freight Corridor
North Sea – Baltic

Annual **Report**

2024



Funded by
the European Union

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Dear Reader,

The year 2024 has been a landmark one for the European rail sector, marked by the entry into force of Regulation (EU) 1679/2024, which re-shapes the architecture of the trans-European transport network and amends the Regulation (EU) 913/2010 on the Rail Freight Corridors. This new TEN-T Regulation integrates the former Rail Freight Corridors into a single, cohesive structure of the multimodal European Transport Corridors (ETCs). For RFC NS-B, this shift brings both opportunities and responsibilities as we align our operations and development strategies with this broader European vision.

The transformation introduced by the TEN-T Regulation is far-reaching. It redefines our Corridor alignment, reinforces coordination with European policy objectives, and places RFCs within a new governance framework under the guidance of European Coordinators. This institutional evolution not only enhances strategic coherence but also sets the stage for improved infrastructure planning and corridor-level coordination across borders.

Importantly, the TEN-T Regulation amends the original RFC Regulation. While the geographical scope of the RFC NS-B has been extended, not all involved countries have opted to take part in the new governance structure. Finland and Sweden have chosen not to participate in the Management Board, while retaining the possibility of future engagement. Ukraine, an EU candidate country since 2022, remains outside of the current framework but may be integrated in the future as it advances in its EU accession process.

Another significant change brought by the TEN-T Regulation is the departure of Czech Republic from our Corridor. With the realignment of the corridors, it now falls under a different ETC. As a result, its participation in the RFC NS-B governance and activities will end at the end of 2025. While we acknowledge and appreciate Czech Republic long-standing contribution to the Corridor's work, we are equally committed to ensuring continuity and strong cooperation.

Despite the structural changes in RFC North Sea – Baltic, our stakeholders can rely on our experience, our collaborative governance model, and our continued focus on seamless cross-border freight movement. While the war in Ukraine continues to cast a shadow over the region, we acknowledge its impact and remain supportive of rail freight connections that contribute to resilience and solidarity in Europe. We also continue to monitor and adapt to new legal and policy developments that will further shape the future of rail transport in Europe, such as the proposed Regulation on capacity management.

We extend our sincere gratitude to all those who contributed to the Corridor's activities in 2024. The Executive Board, Infrastructure Managers and Allocation Body, Advisory Groups, Working Groups and the European Commission have all played vital roles in navigating this year of change. We look forward to continuing this journey together – stronger, better aligned and future-ready.



Oliver Sellnick

Chairman of the Management Board



Katarzyna Wachowicz

Managing Director

INTRODUCTION

This document presents the Annual Report 2024 of Rail Freight Corridor North Sea – Baltic (RFC NS-B). Although the revised TEN-T (Trans-European Transport Network) Regulation will bring major changes to the Corridor and preparations to adapt to the new environment have started, the situation on the Corridor remained mainly the same in 2024. 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 of Antwerp-Bruges, 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.

In 2024, the RFC NS-B routes comprise:

- 5 253 km of principal lines,
- 2 551 km of diversionary lines,
- 890 km of connecting lines,
- 960 km of expected principal and expected diversionary lines,
- 271 terminals
- 14 seaports: Port of Antwerp-Bruges, North Sea Port (Gent / Terneuzen), Rotterdam, Amsterdam, Wilhelmshaven, Bremerhaven, Hamburg, Riga, Ventspils, Liepāja, Paldiski, Klaipėda, 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 \(CIP\)](#).

1. GOVERNANCE

The governance structure of RFC North Sea – Baltic is divided into the following levels: the Executive Board (ExBo), the Management Board (MB) and the Advisory Groups (AGs).

The ExBo is composed of representatives of Ministries in charge of rail transport of the cooperating countries and is responsible for defining the general goals of the Corridor.

The MB is the decision-making body of the Corridor and consists of representatives of the cooperating Infrastructure Managers (IMs) and Allocation Body (AB) of the eight countries involved. Since 2016 the MB has the legal form of a European Economic Interest Grouping (EEIG).

The Advisory Groups, consisting of Railway Undertakings (RUs) and interested applicants and Terminal owners/operators, issue opinions on any proposal by the MB, which has direct consequences for them or issue own-initiative opinions, which shall be taken into account by the MB.

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



1.1 EXECUTIVE BOARD

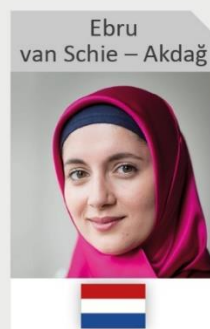
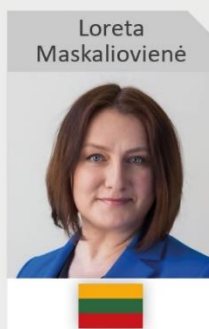
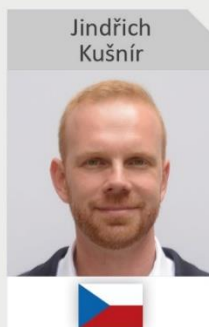
The Executive Board of RFC NS-B, as referred to in Article 8 of Regulation (EU) 913/2010, was established on the 20th of March 2012 by the Mission Statement, which was replaced by the Joint Declaration of Intent regarding the establishment of the Executive Board of RFC North Sea-Baltic dated on the 22nd 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 RFC Regulation. They are signed by all members of the Executive Board and are published.

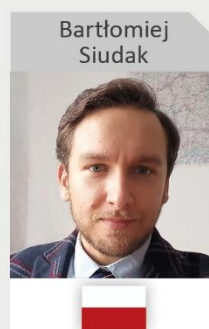
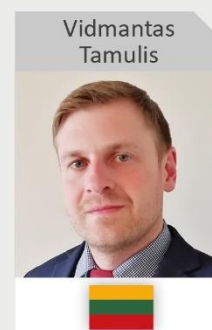
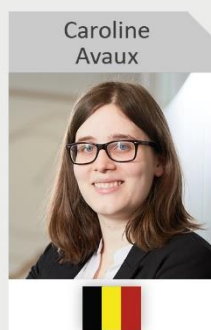
The Board meets four times a year and has a rotating presidency. It was chaired in 2024 by the Estonian Ministry of Transport.

There were several changes in 2024 regarding the representation of the Member States in the ExBo. After many years of representation, the Dutch member Marcel Tijs left his position on 1st of November 2024 and was replaced by Hinne Groot. There was also a change in the Polish representation. Jakub Kapturzak left his position at the end of the year and Dariusz Knopp took over from January 2025.

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 2024 were held in:

- March 2024 – Amsterdam (Netherlands)
- June 2024 – Vilnius (Lithuania)
- October 2024 – Prague (Czechia)
- December 2024 – only online meeting.

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

One of the important topics discussed by the ExBo in 2024 was the process of implementing the Regulation (EU) 1679/2024 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, that was formally adopted in June 2024. ExBo members evaluated its impact on the Corridor operations and discussed how to fulfil the obligations arising from the adopted Regulation. A fundamental step will be the change in the Corridor routing and governance structure. It will no longer include the Czech network, but instead will include Sweden, Finland and Ukraine. In order to reflect this change, the Joint Declaration establishing the Executive Board of RFC North Sea – Baltic needs to be amended. According to the deadlines set by the new Regulation, this process must be completed by January 2026. With regards to the new routing of the Corridor, the ministries of Finland and Sweden were approached and invited to participate in the ExBo meeting in December 2024. The Finnish ministry presented a statement according to which Finland will make use of the derogation stemming from the RFC Regulation and will not be a full member of the Corridor.

Another important topic that was discussed in 2024 was the legislative process of the Proposal for a Regulation of the European Parliament and of the Council on the use of railway infrastructure capacity in the single European railway area, amending Directive 2012/34/EU and repealing Regulation (EU) No 913/2010, published in July 2023. This legislation is crucial for the future of the Corridor, because according to the proposed Regulation, RFCs will only operate until December 2029. In this regard, the ExBo had extensive discussions on the possible impact and necessary steps to ensure a smooth transition to the new routing and governance structure. The general approach of the EU Council was adopted in June. Yet there are still many negotiations left within the triad between the 3 European institutions.

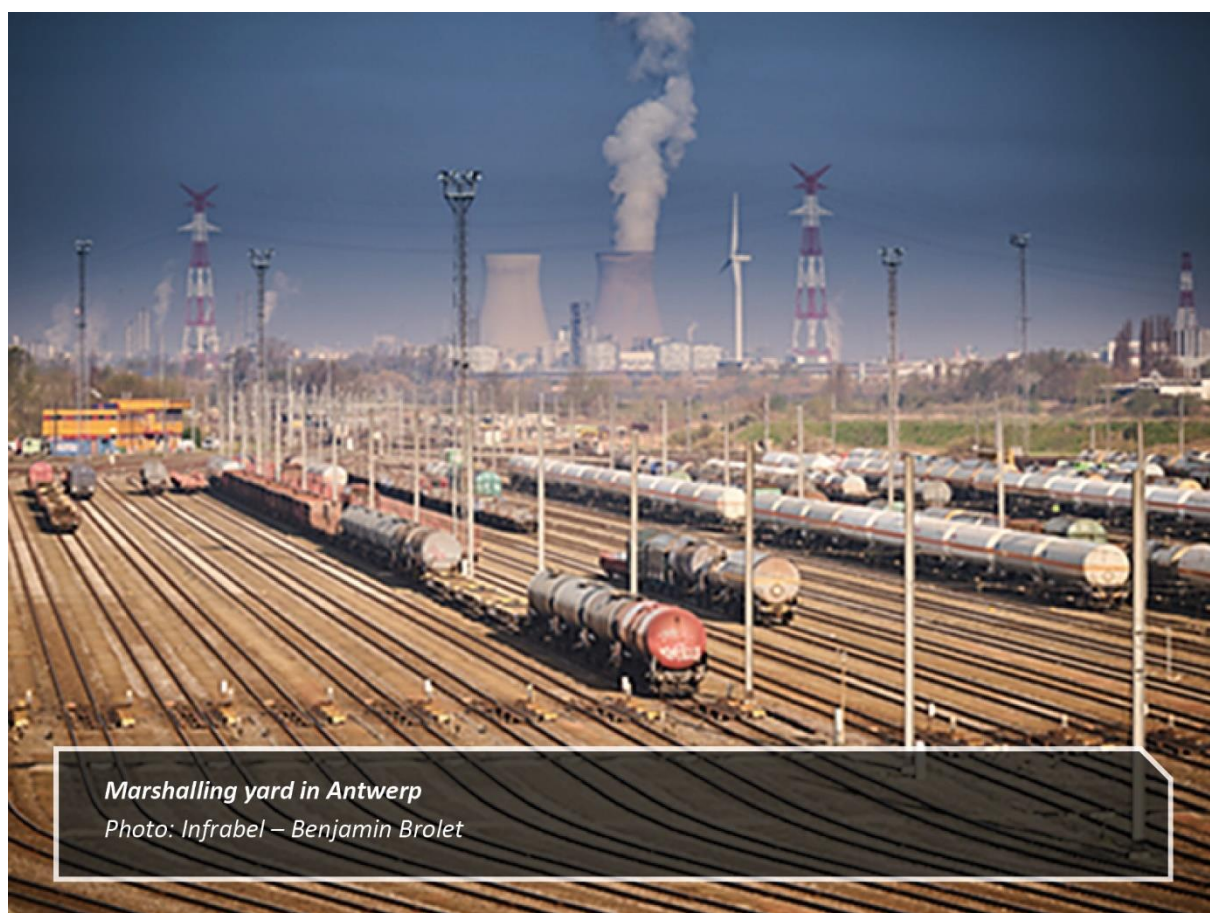
Similar to previous years, the TEN-T European coordinator, Ms. Catherine Trautmann, was invited to the discussion, in 2024 it was as part of the Amsterdam meeting.

As in the previous year, the project of Digital Automatic Coupler (DAC) was also discussed. Among others, the Czech Cost Benefit Analysis (CBA) study was presented in the Amsterdam meeting. The issue of military mobility was also discussed several times, as well as the geopolitical situation's influence on the corridor operations and freight flows.

1.1.2 Cooperation at EU level

In 2024, 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 Luxembourg and Denmark during that period. The forum has been put in place to exchange information and best practices among the ministries participating in the different RFCs.

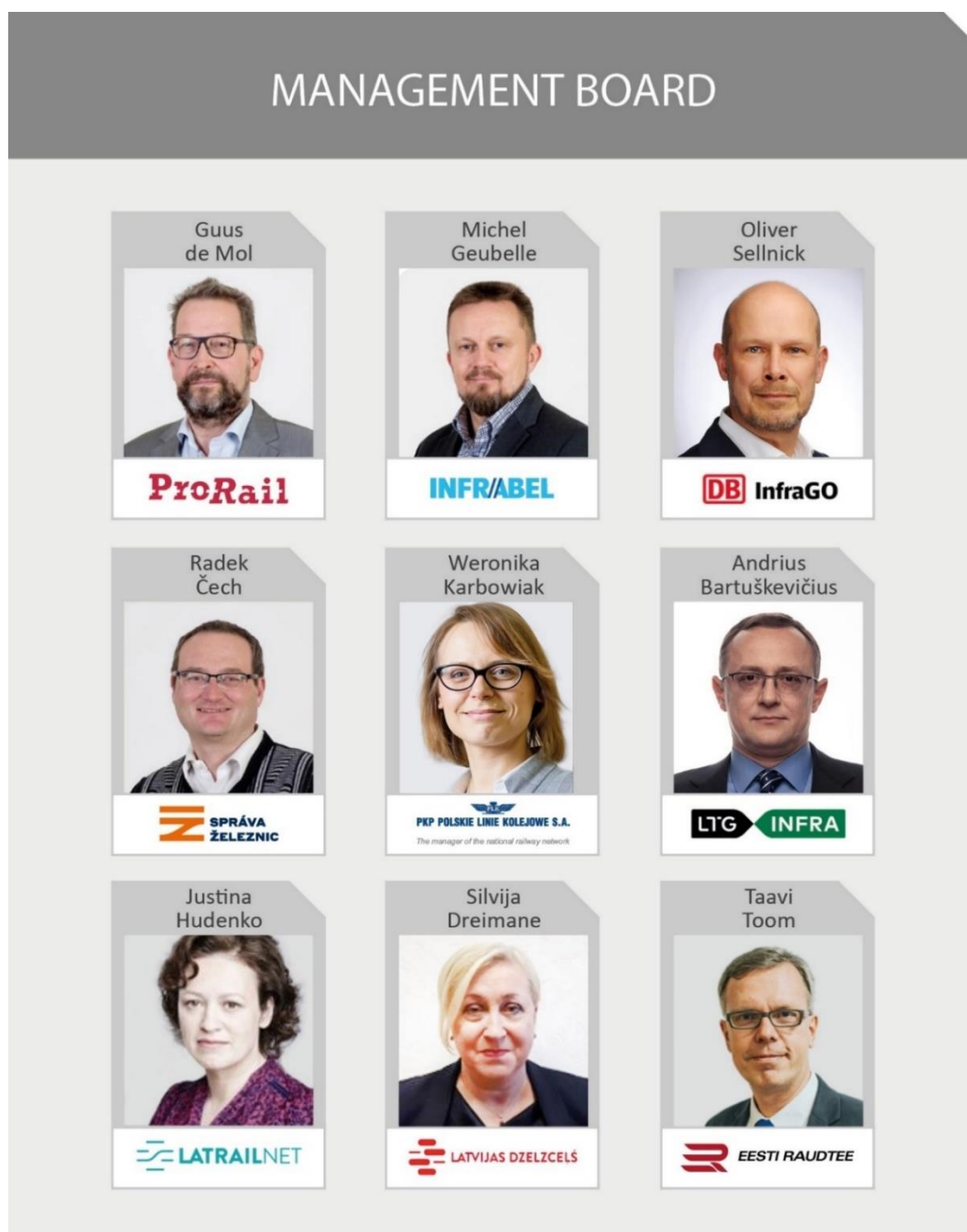
Two meetings took place in 2024, in June and December. Various topics were on the agenda. Among them, as for RFC NS-B, the then still draft TEN-T Regulation and the proposal for a Rail Capacity Management Regulation were heavily discussed. A dedicated meeting on this last point was also organized on 27 September among members of the NExBo and with the European Commission. Other topics, such as the follow-up of the work done at RNE level, the relaunch of the KPI (Key Performance Indicator) Working Group and information on studies launched by the European Commission were also discussed at the level of the NExBo.



1.2 MANAGEMENT BOARD

In 2024, the Management Board, chaired by Mr. Oliver Sellnick from DB InfraGO AG, held eight meetings in total, both physical and online. The activities of the Management Board, carried out in 2024, are further described in chapters 2-4. Since 2016, the MB has the legal form of a

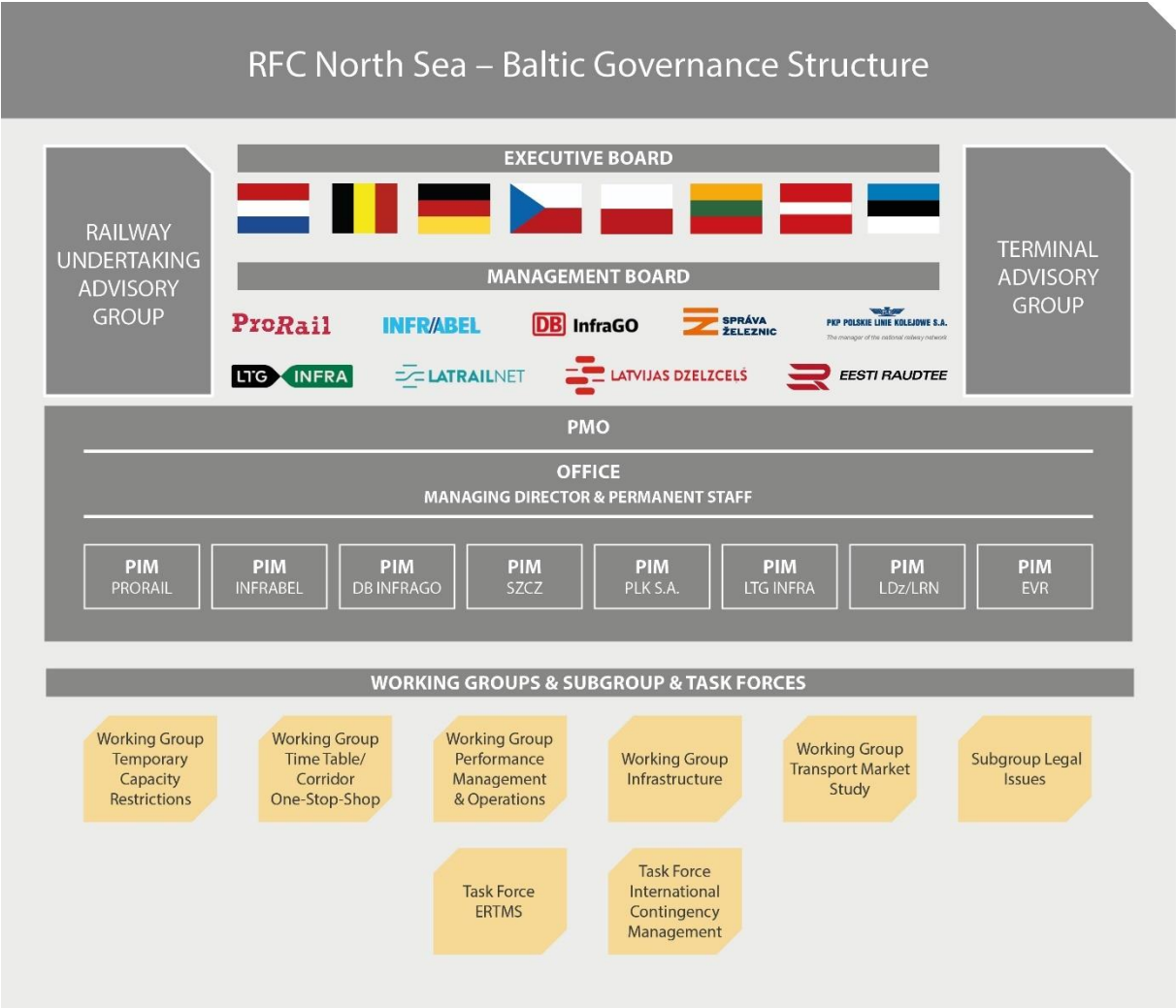
European Economic Interest Grouping. It is composed of the following Members representing the Infrastructure Managers and Allocation Body of the eight countries of the Corridor.



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



The structure of the Project Management Office (PMO) and the different working groups, subgroup and task forces is shown below. In 2024, eight PMO meetings in total, both physical and online, took place.



1.3 ADVISORY GROUPS

Each Advisory Group 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 taken into account by the MB. The role of the AG will be enhanced with the implementation of the new TEN-T Regulation and the amended RFC Regulation.



Each AG is chaired by a Speaker, who acts as the contact person between the MB and the AG members. In 2024, 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. Two Advisory Group physical meetings were held in 2024 with representatives of Railway undertakings, Terminals, Infrastructure Managers, Ministries, Regulatory Bodies (RBs) and invited guests on:

- 6th of March 2024 - RAG/TAG meeting in Amsterdam
- 9th of October 2024 - Joint RAG/TAG meeting in Prague.

In addition, a RAG/TAG webinar was held on the 13th of June regarding the RFC NS-B Performance Report in order to present the report and clarify any questions.

The first physical meeting in Amsterdam was attended by more than 40 participants and the second in Prague by more than 80.

During the first RAG/TAG meeting, the hosts of the meeting presented information regarding the Port of Amsterdam, as well as its vision and plans for the future. The results of a study conducted by SCI Verkehr were presented in which also RFC NS-B was analysed. Additionally, the state of play and implementation of the Rail Baltica project was presented in response to the questions from the RAG members. The Corridor One-Stop-Shop (C-OSS) Manager informed participants about the offer published in January 2024, including the improvements implemented for the PaP capacity offer for TimeTable (TT) 2025.

The second RAG/TAG meeting in Prague was jointly organised with RFC Rhine – Danube and RFC Orient – East Med as requested by the RAG/TAG members. The RAG Speakers presented the topic of quieter sections in relation to the Noise TSI regulation and the

investments needed to improve the capacity at the Medyka – Mostiska Border Crossing Point (BCP). Additionally, Joost Overdijkink, UIC representative and ECCO Chairman, presented a proposal for a compensation model for TCRs (Temporary Capacity Restriction) developed by the speakers. During the TAG slot, the RFC NS-B TAG Speaker raised the topic of benefits of participation in the RAG/TAG meetings and provided an update regarding the Rail Facilities Portal. The joint presentations were related to Capacity Management, Temporary Capacity Restrictions and Cross-border issues dealt with in the Quality Circle Operations. The Managing Director of the RFC NS-B, Katarzyna Wachowicz, presented the impact of the revised TEN-T Regulation providing some background information, including the changes posed upon the RFCs by this Regulation, along with the timeline of when they will take place.

In 2024, RFC NS-B also organized the joint TAG online meetings in cooperation with RFC Baltic-Adriatic:

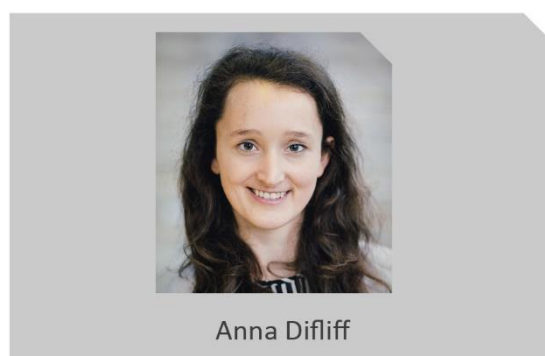
- 28th of June 2024
- 4th of September.

The TAG online meetings were attended by the TAG Speakers, members and representatives of the Union for Road-Rail Combined Transport (UIRR) . During the meetings, the participants were presented with the key outcomes of the first meeting of the TAG Speakers with RFC Network and the state of play of the Rail Facilities Portal, TIS (Train Information System) integration and Market analysis state of play.

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 constantly shape the capacity portfolio.

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

- the Forum Train Europe Conferences B (online) and D (online);
- the RailNetEurope (RNE) working group for the development of the Path Coordination System (PCS Capacity Broker) with applicants' involvement;
- the C-OSS Community working group;
- International trade fairs and events such as the Connecting Europe Days in Brussels, InnoTrans and the Terminal Day in Berlin.



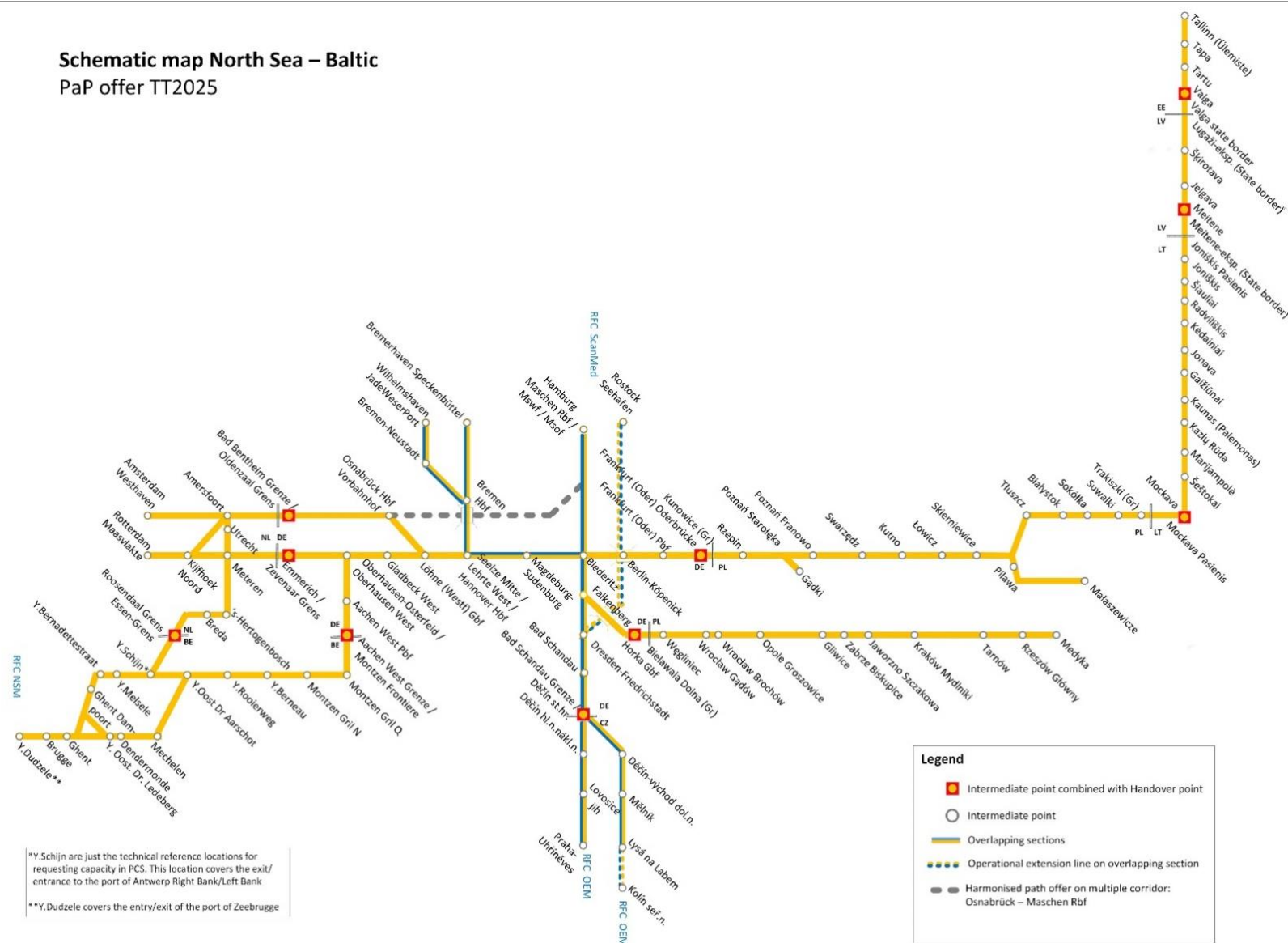
Besides that, the C-OSS took part in several RNE meetings to advise on international processes and working methods in cooperation with applicants and IMs.

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 2024. 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.

2.1.1 Pre-arranged Paths

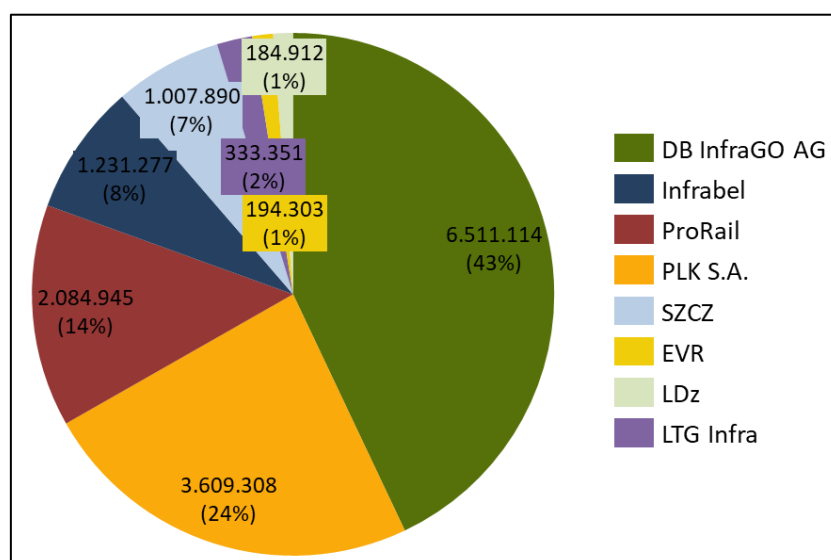
The 2025 timetable catalogue of Pre-arranged Paths (PaPs) was published on 8th of January 2024 for the sections indicated in the schematic map presented on the next page.

Schematic map North Sea – Baltic
PaP offer TT2025



The PaP capacity offer TT2025 decreased compared to the previous year due to a higher number of TCRs on DB InfraGO AG territory and less working days. Especially the works between Emmerich-Oberhausen with an 80-week closure and Hamburg-Berlin with split paths and total closures affected the capacity on central Corridor lines. 15.16 million path km (days x km) were constructed as PaPs and offered to the European applicants to request for their individual international traffics until 8th of April 2024 for TT2025.

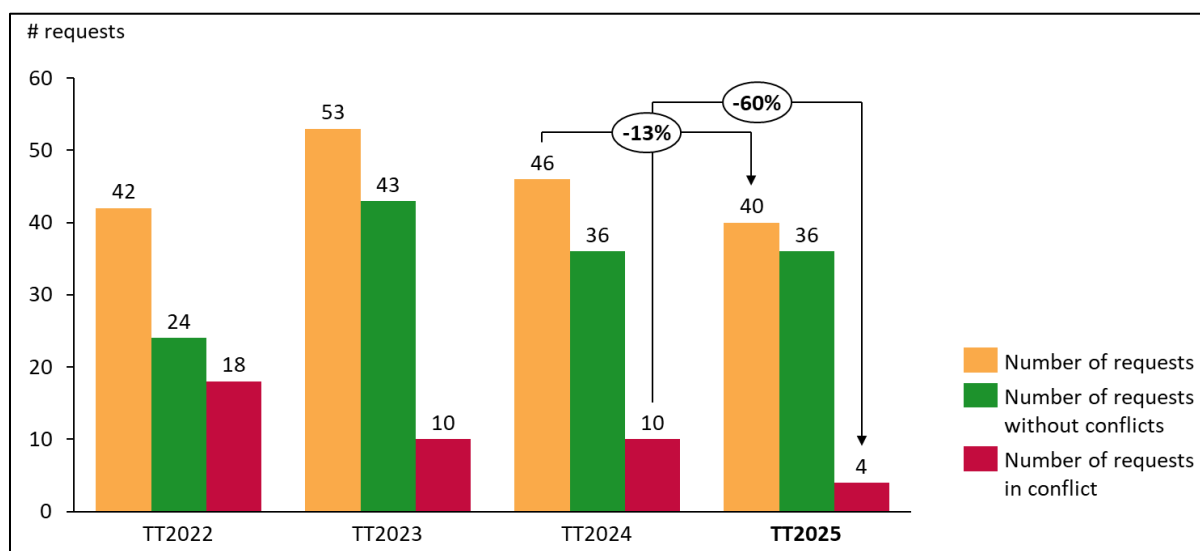
KPI Volume of offered capacity TT2025 per IM



Allocation of PaPs for TT2025

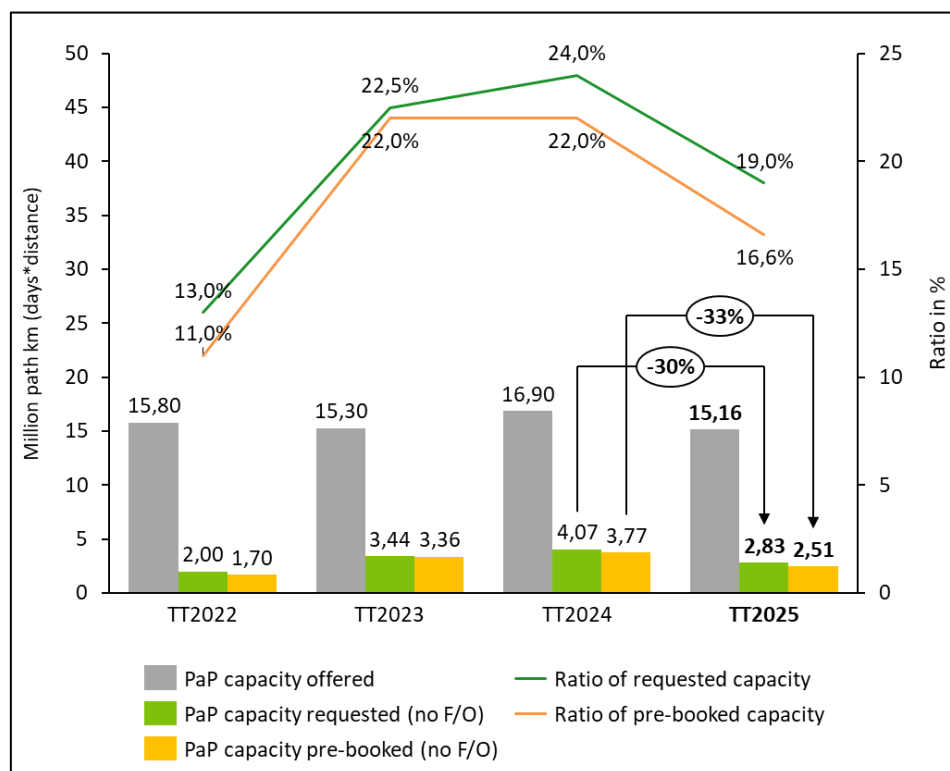
Ten leading applicants were involved in requesting paths for international freight traffic along the Corridor. All requests were placed on time in PCS. The graph below presents the comparison of the number of requests, where the RFC NS-B C-OSS was in the lead and the number of conflicts, which focused on the harmonized paths (HaP) stretches with RFC ScanMed and could all be solved. While the number of requests decreased by 13% for TT2025, the number of conflicts fell disproportionately compared to TT2024.

KPI Number of requests and Number of requests in conflict TT2022-TT2025



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 (bar chart on left axis). The Ratio of requested capacity and the KPI Ratio of pre-booked capacity are also shown on the graph (line chart on right axis).

KPI Volume of offered, requested and pre-booked PaP capacity on RFC NS-B



Both the PaP capacity requested and the PaP capacity pre-booked decreased by around one third compared to TT2024 and are almost back to the levels of TT2022. Compared to the PaP capacity offered, the volumes have dropped to a ratio of 19% and 16,6% respectively.

The fragmented offer due to TCRs and the economic instability, negatively impacted the number of requests and the volume of requested PaP capacity despite requests by new applicants. Although the harmonized path sections with RFC ScanMed showed as bottleneck during conflict resolution and two customer dossiers had to be rejected due to data inconsistencies, the volume of pre-booked PaP capacity was satisfying against the volume of requested PaP capacity.

Despite a delay in the Draft Offer for 7 dossiers, the Final Offer was submitted on time for 33 out of 38 dossiers, reflecting an improvement in national processes. Ultimately, 23 dossiers (61%) reached Active Timetable on time, 2 dossiers were closed as “not needed” by the applicants.

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 TT2024, RFC NS-B offered 4.8 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 TT2024 catalogue for the RC slots was published on 9th of October 2023. RC was not requested for TT2024.

2.1.3 Cooperation with other Corridors

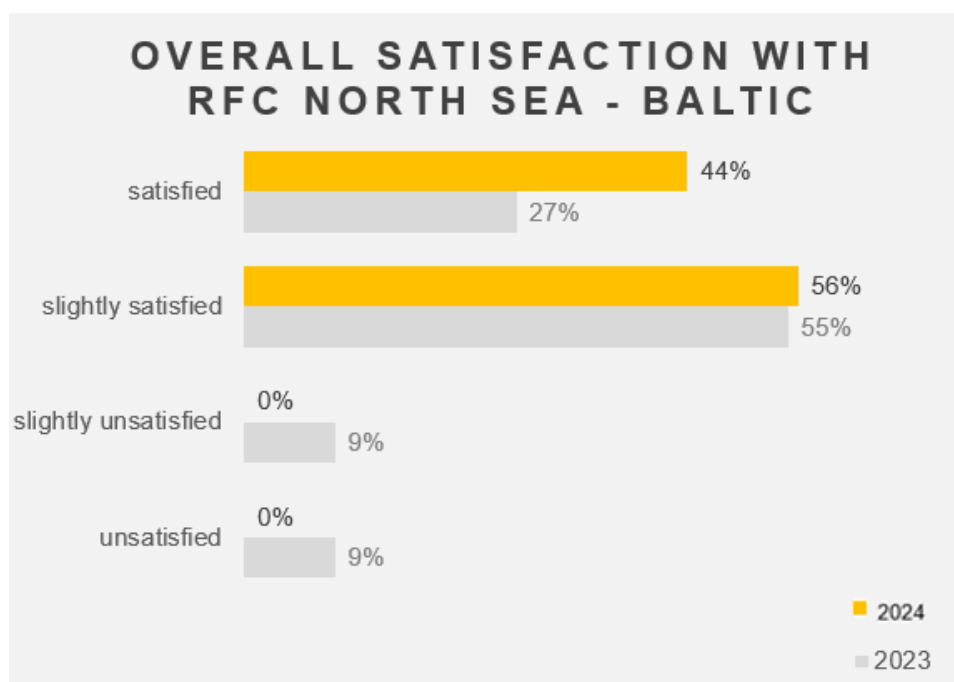
The extension of RFC Orient/East-Med (RFC OEM) to Germany in 2018 led to long overlapping sections with RFC NS-B. To optimize the usage of the scarce capacity in the bottleneck sections and to avoid negative competition between the corridors, a collaborative model was chosen to regulate the workflow 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 paths (HaPs). For TT2025, 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 territory 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 USER SATISFACTION SURVEY

In 2024, for the ninth time in a row, the Corridor conducted a User Satisfaction Survey (USS) jointly with all 11 RFCs under the RailNetEurope umbrella. Similar to last year, participants could also choose to be directly interviewed. No interviews were held on RFC NS-B. Out of 35 invitations sent by and on behalf of RFC NS-B, 9 respondents took part in the survey.

The overall satisfaction with RFC NS-B was 100 %, meaning an 18% increase in comparison to the previous year, where 82% was reached. The overall satisfaction with the RFC NS-B is presented on the graph on the next page.



The customers were satisfied the most with the information provided by the RFC and again with the service by the C-OSS. Additionally in 2024 train performance measures were also rated very high. The topic RFC NS-B should put more focus on is the temporary capacity restrictions. The full results of the 2024 USS can be found on the [Corridor's website](#).

The 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.

2.3 CORRIDOR PERFORMANCE

According to Article 19(2) of the RFC 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 2024, the Performance Report of RFC NS-B for the year 2023 was published on the [Corridor's website](#).

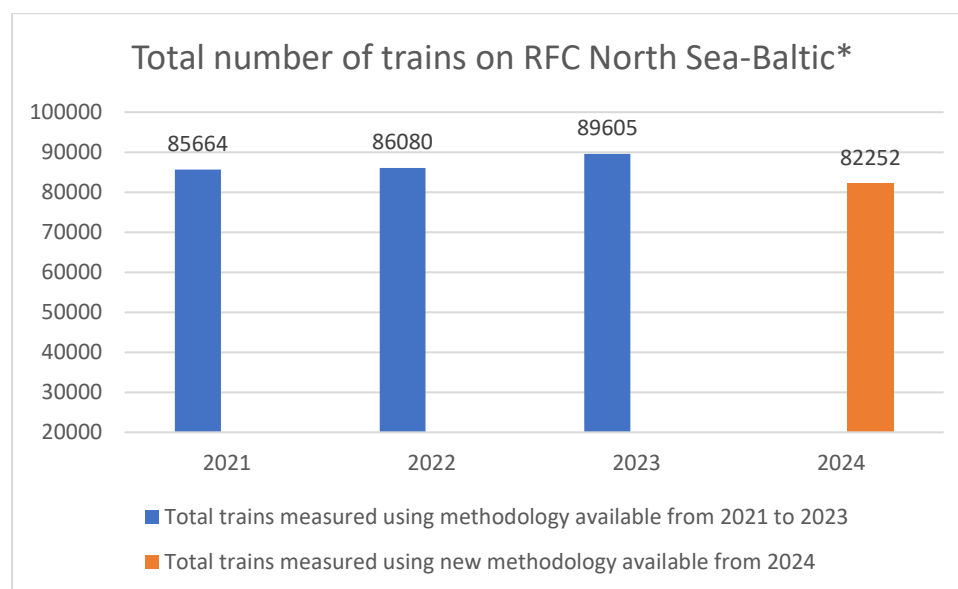
The full results for the year 2024 will be published in the first half of 2025, based on the commonly agreed KPIs as described in the RNE KPI Guidelines. Two of these KPIs are already shown below. The capacity management KPIs can be found in subchapter 2.1.

Number of trains on RFC North Sea-Baltic

This KPI displays the number of international freight trains that cross at least one international border and operate on designated RFC NS-B lines. The data for this KPI comes from the Train Information System (TIS), managed by RNE.

For 2024, a new RFC train definition was used (for more detailed information see below and in the Performance Report), which makes it difficult to make a real comparison with the previous years.

This KPI figure is displayed for a 4-year period. **In 2024, the total number of trains on RFC North Sea-Baltic is 82.252.**



* Data from Estonia and Latvia is not included here as they are not using TIS. TIS data for Lithuania is included from April 2024 for the Polish – Lithuanian border.

In 2024, a decrease in the total number of trains of 8,2 % is noticed compared to 2023. This can be partly explained by the use of the new RFC train definition that was introduced by the RFC Network in 2024. This should lead to a more precise allocation of individual trains to an individual RFC, especially on some overlapping borders. For RFC NS-B this led to a reduction in the number of trains at the border Zevenaar Oost - Emmerich as the trains going South to Switzerland and Italy are no longer identified as belonging to this Corridor.

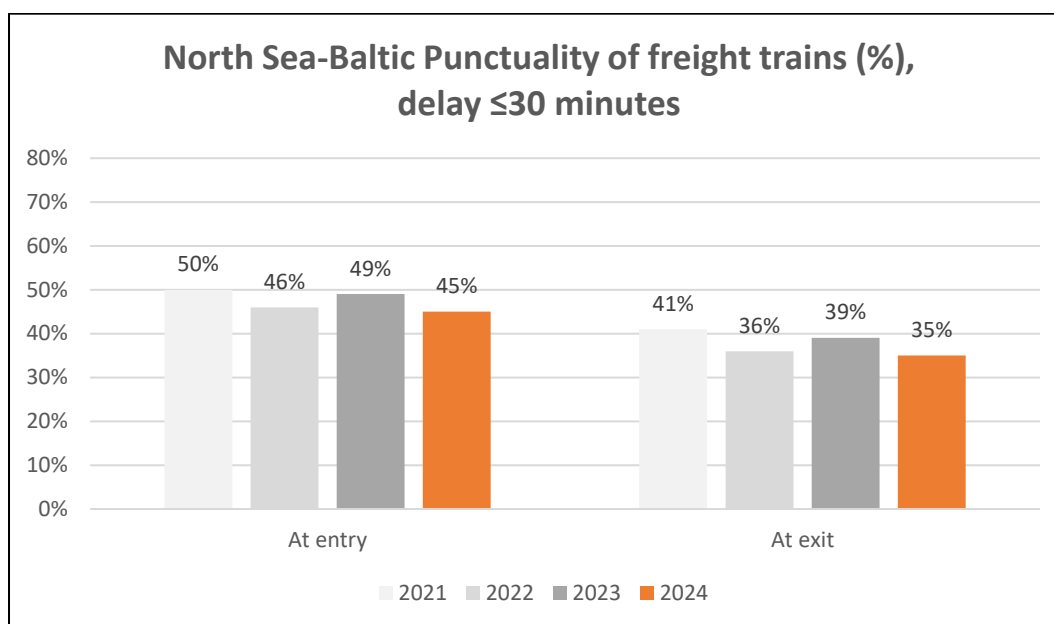
Another factor that impacted the number of trains was the data quality improvement on the German / Polish borders of RFC NS-B, which reduced double counting occurring there.

However, despite these changes it can be concluded that the overall trend for 2024 compared to 2023 shows a slight increase in the number of trains on the Corridor, (approx. 3%), based on data available for the borders of the Corridor.

Punctuality

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 ≤ 30 minutes. The calculation is based on data from the Train Information System.

Punctuality for 2024 at entry is 45% and at exit 35%. Average overall punctuality is 40%. In 2024 the delta between entry and exit punctuality is 10%.



A decline in punctuality on the Corridor for both RFC Entry and RFC Exit can be noticed in 2024, but the delta remained at the same level. Major construction works, some big disruptions and extreme weather conditions have been the most significant causes of delay and these have affected the punctuality on the Corridor.

More detailed information regarding the delay reasons specifically on each IM's network can be found 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 over 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

Most delays on the ProRail network were caused by planned works and also unplanned works, caused by unexpected technical issues.

During 2024 there were some longer periods of total closure of the German railway line between Emmerich and Oberhausen. During these periods freight trains from and to Germany

had to run via the border stations Oldenzaal (Bentheimroute) and Venlo (Brabantroute). Both these routes have freight traffic as well as heavy passenger traffic. Punctuality of the freight trains running via these routes is always lower than on the dedicated freight line “Betuweroute”.

Belgium

Most delays on the Infrabel network were caused by single incidents: delays from the neighbouring IMs and incidents involving a person. Despite multiple measures being implemented to prevent the last one, these incidents still cause a lot of delays, but less than compared to 2023.

Other causes with a big impact on the punctuality figures were a fire in a signal box and some cases of infrastructure breakdown.

Due to the better communication regarding the rules of exceptional transport with DB InfraGO AG, this no longer popped up as a major incident in 2024 as opposed to 2023.

Germany

In 2024, the network again experienced an exceptionally high volume of construction and maintenance works, which led to several delays. Challenging construction works at the Elbe Valley / Dresden station (June-December), Frankfurt(Oder) Oderbrücke (January, February-April, July-October), Emmerich (January, May, June) and the start of DB InfraGO's AG new special corridor construction plan in Emmerich (November, December) had a major impact on traffic on RFC NS-B. In addition, major disruptions such as the train derailments in Bad Schandau (August) and Frankfurt(Oder) Oderbrücke (October), International Contingency Management (ICM) cases near Aachen (Nov/Dec) as well as the flooding on the Elbe in Autumn caused disruptions to operations. Another factor that negatively affected operational quality was the strike by the GDL trade union at the beginning of the year.

Czech Republic

The punctuality on the SZCZ network in 2024 was influenced by capacity restrictions due to reconstruction works on the network, mainly the extremely limited capacity as a result of reconstruction works in the Elbe Valley. 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) and weather conditions – especially floodings in September with consequences till October/November. Less important factors influencing the Corridor's punctuality are rolling stock issues, maintenance-related capacity limits and infrastructural breakdowns.

Poland

There were no specific delays pertaining to freight traffic in 2024 on the PLK S.A. network for the RFC NS-B railway lines. Rail freight punctuality remained unchanged, 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 2024, Lithuania's railway punctuality stands at 87%; a slight 2,5% increase compared to 2023. No major incidents were reported. The ongoing electrification project on most of the main lines had no major impact on punctuality as capacity requests were adjusted accordingly. The busiest RFC border section in Lithuania is Mockava – Trakiszki. Compared to 2023, traffic in this section has seen a slight decrease. Delays at this border section are notably decreasing due to well-coordinated actions between the IMs.

The Joniškis – Meitene border has maintained good punctuality, with a 12% decrease in freight traffic compared to 2023.

On the Turmantas – Kurcums border, traffic is increasing although numbers remain insignificant, and it does not affect punctuality.

Latvia

Latvian Railway has a reliable infrastructure with plenty of capacity but unfortunately not enough freight trains to realize all its potential. In 2024, the train traffic was generally doing well except for one issue, in the night of 28/29 August, when a terrible hurricane hit Latvia. There was a lot of damage including to the railway infrastructure and this caused many delays to train traffic, however for trains related to RFC NS-B only one train was affected.

In 2024, there were some rare cases with locomotives malfunctioning and with loco driver issues at the Lugazi – Valga border point. Also, one freight train was delayed by bad weather conditions, but punctuality was high at 98%.

At the Meitene – Joniškis border point, the punctuality is 92% and has decreased a little compared to 2023. Traditionally freight trains run there on actual time (by dispatcher's command) and could not be considered as delayed, but in 2024 one of the RU's booked Pre-arranged Paths (one per day), but despite this the trains from the neighbouring IM often arrived without any schedule. Latvian Railway was forced to take them into account as delayed trains. However, not all delayed trains are delayed for this reason, there were also four cases where the RU itself couldn't provide a locomotive for their train.

On the diversionary line, with the border point Kurcums–Turmantas, there was an increase in trains (from 2 to 9 trains in 2024), however the punctuality was not impacted.

Estonia

Overall, there are no big problems with punctuality at the Valga-Lugazi border or in the Estonian public network in general 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 have priority in traffic. Despite these minor issues, the overall punctuality of both passenger and freight trains in Estonia was above 99% in 2024.

2.4 TEN-T REVISION

On 28th of June 2024, Regulation (EU) 2024/1679 of the European Parliament and of the Council on Union guidelines for the development of the trans-European transport network, amending Regulations (EU) 2021/1153 and (EU) No 913/2010 and repealing Regulation (EU) No 1315/2013 was published. It entered into force on the 18th of July 2024. This Regulation marks a significant milestone in the development of the TEN-T network.

This Regulation introduces a third layer, namely the extended core network, next to the already existing core and comprehensive network, each with a specific completion deadline being 2030 (core), 2040 (extended core) and 2050 (comprehensive).

A pivotal aspect of this regulation is the emphasis on enhancing rail freight transport. It describes enhanced infrastructure requirements for the TEN-T network, including requirements for 740m trains, nominal track gauge, electrification and ERTMS and adds new requirements regarding loading gauge. These standards aim to boost the efficiency and competitiveness of rail freight across the European Union.

It defines 9 multimodal European Transport Corridors, that integrate the former 11 RFCs, leading also to a new alignment of the RFC NS-B. This new corridor needs to be operational at the latest in January 2026. You can read more about the consequences on the Rail Freight Governance in part 1.1.1 (key activities of the Executive Board) and how the RFC is preparing for this new environment in chapter 5.1 (Outlook).

Furthermore the TEN-T Regulation strengthens the performance of the RFCs by introducing operational priorities related to dwell time and punctuality.

These priorities are designed to enhance the reliability and efficiency of cross-border rail freight services.

2.5 TRANSPORT MARKET STUDY

In accordance with the requirements of Regulation (EU) 913/2010, the 2024 joint Transport Market Study (TMS) update (conducted by 11 RFCs and coordinated by RailNetEurope), aimed to establish a unified approach to analysing transport markets across the 11 RFCs. Utilising the NEAC model, which integrates socio-economic, trade and transport statistics across EU and non-EU countries, the study assessed the current and projected transport markets with a focus on the 2030 horizon.

The study identified key transport origins and destinations, emphasising the broader catchment area beyond RFC's infrastructure, including countries like Ukraine, Finland and the United Kingdom. Through three scenarios – reference, projects and sensitivity – the study evaluates the economic growth, infrastructure projects and potential enhancements aligned with TEN-T standards.

Key findings reveal that the European rail freight sector continues to face structural challenges despite moderate growth. Rail freight transport increased marginally, however combined transport experienced substantial growth, largely due to market liberalisation and a shift towards greener logistics solutions.

The study also highlights the enduring impact of external disruptions, including the 2008 crisis, COVID 19 pandemic and the geopolitical crisis triggered by Russia's war of aggression against Ukraine. These events have significantly altered transport flows, particularly affected the Baltic States, while increasing traffic between Ukraine, Moldova and the EU persist due to global crises, shifting commodity trade patterns and evolving rail freight market structures.

Despite progress, achieving the European Green deal's ambitious targets of increasing rail freight by 50% by 2030 and doubling it by 2050 remains challenging. Continued investments in infrastructure, harmonised standards and coordinated planning across Europe will be essential to bridge the gap and promote rail freight as a sustainable and competitive transport mode.

The Executive Summary of the study can be found [here](#).

2.6 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,
- Optimised use of resources of trainsets, drivers and wagons as well
- Optimised and more reliable running time of the train.

In 2024, RFC NS-B continued the work on the cross-border improvements through the Quality Circle Operation projects (QCO) for the border crossings Frankfurt(Oder) – Rzepin incl. Horka-Wegliniec, Bad Schandau – Děčín, Bad Bentheim – Oldenzaal, Emmerich-Zevenaar incl. Kaldenkirchen – Venlo and Aachen – Montzen (under the lead of RFC Rhine-Alpine) implementing several measures. Task force members met regularly to improve the communication at the borders and monitor the implementation of developed processes. The QCOs served as a valuable platform to exchange information and test new solutions.

The QCOs on the German-Dutch borders are facing since November 2024 the biggest challenge due to the planned 80-week closures between Emmerich and Oberhausen, e.g. Bad Bentheim border has to tackle up to 32 more freight trains per day rerouted from Emmerich. Because of this challenge a monitoring process was implemented for the border, additionally to the minimum order criteria and the check-in process which were introduced for TT2025 onwards.

At the QCO Frankfurt(Oder) Oderbrücke - Horka an exchange program has been organized for the control towers Wroclaw and Leipzig visiting each other's workplaces.

On the QCO Bad Schandau - Děčín the co-operation between Správa železnic and DB InfraGO AG has been intensified with an on-site meeting in Děčín and the establishment of regular information exchange through weekly meetings and communication channels. The RFC dispatcher – implemented in 2023 - has already reached full operation. RUs were requested regularly to coordinate their operational issues with their partnering RUs.



2.7 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.¹ The main idea was to establish a common platform for the exchange of experiences and to help solve issues between Ukraine and the EU. This successful initiative continued in 2024 and facilitated Ukraine's agricultural export and trade with the EU, which were severely impacted by Russia's aggression.

Since May 2022, the Solidarity Lanes have allowed Ukraine to export around 179 million tonnes of goods, including around 85 million tonnes of grain, oilseeds, and related products and import over 70 million tonnes of goods from military and humanitarian aid to fuel and other products. The total value of trade via the Solidarity Lanes is estimated at around €211 billion, including around €150 billion in imports to Ukraine.

The European Commission, together with partner financial institutions, are investing in capacity increases, repairs and liquidity for operators.

¹ https://transport.ec.europa.eu/news-events/news/solidarity-lanes-european-commission-launches-eu-ukraine-business-matchmaking-platform-2022-06-03_en

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 increasing global food security and providing a lifeline for Ukraine's economy.

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.

2.8 EVENTS

2.8.1 Connecting Europe Days

The Connecting Europe Days took place from 2nd to 5th of April 2024 in Brussels. It's a key event that brings together high-level policymakers, industry leaders, and experts from across Europe to discuss the development and implementation of the TEN-T Network. The event provides a platform for showcasing major infrastructure projects and fostering cooperation. The topics discussed included concrete measures and exchange good practices on creating a sustainable, smart and resilient, transport and mobility network in Europe. There was also a dedicated debate on boosting rail freight traffic.

RFC NS-B, together with the RFC Network and RNE participated in the Connecting Europe Days, sharing a common stand in the exhibition hall.



The RFC Network organized a special break-out session on improving the performance of cross-border rail freight traffic, which was held on the 4th of April 2024. The RFC NS-B MB Member, Guus de Mol, moderated the event.

Additionally, during the conference, Ms Trautmann organised an informal European Transport Corridor Meeting to introduce the new ETC North Sea – Baltic. Weronika Karbowski, RFC NS-B MB Member, was one of the panellists.



2.8.2 Customer Conference of DB InfraGO AG and PKP PLK S.A

The 14th Customer Conference of DB InfraGO AG and PKP S.A. took place on 5th – 6th of November 2024 in Potsdam. The conference was divided into four thematic blocks:

- Current status of projects on the Polish-German border, including the future method of transition
- Main railway line modernization program and new systematics of closures for the maintenance of the network in Germany
- Introduction of TAF/TAP TSI
- Extraordinary transport.



2.8.3 Terminal Day

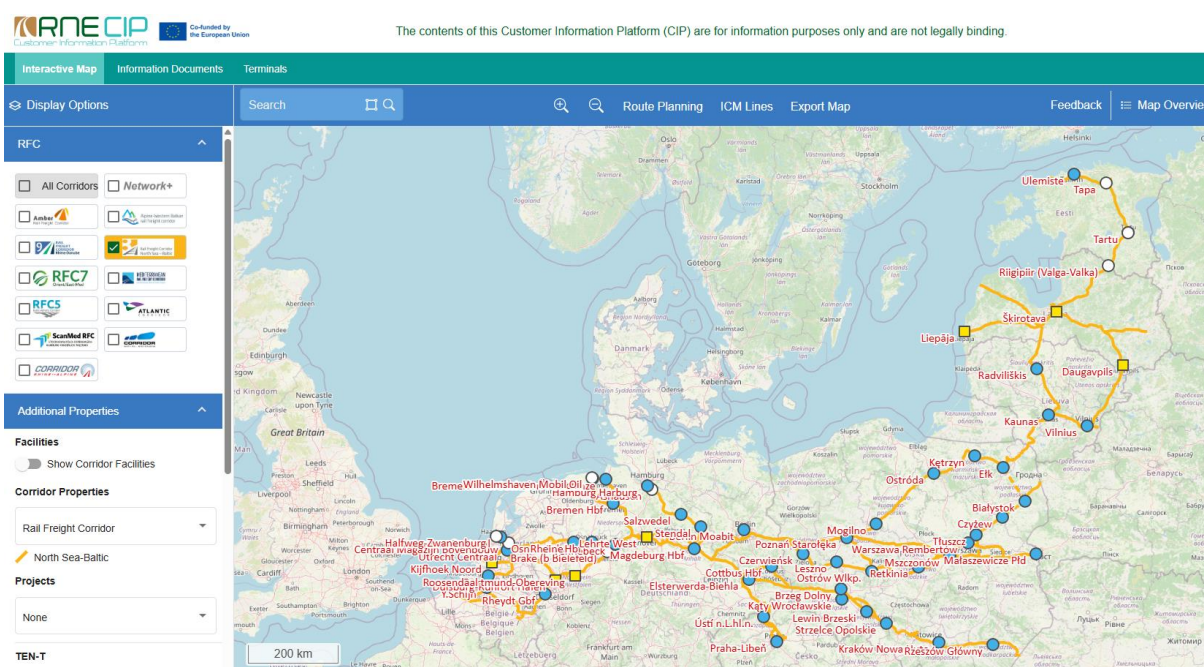
On November 7th, 2024, the RFC NS-B C-OSS Manager participated in the Terminal Day organized by SGKV e.V in Berlin focusing on the transformation of the combined transport industry (in Germany).



and guidelines as well as the RNE IT tools, such as PCS, TIS, CIP, and Network and Corridor Information (NCI) System.

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 2024, RNE continued work on the development of the digital [Railway Infrastructure System](#) (RIS) (see subchapter below). Similar 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. In 2024, the new modernised and user-friendly layout and user interface were developed. Offering both internal and external users a better opportunity to create synergies and access data more efficiently. The new CIP is a part of the Railway Infrastructure System.



More information regarding CIP can be found on [RNE CIP information subpage](#).

Railway Infrastructure System project

In 2024, RNE and RFC representatives continued developing the Railway Infrastructure System. The Railway Infrastructure System (RIS) is in full operation since 5th of August 2024. RIS is a digital platform designed to simplify and improve the management of infrastructure railway data by the Infrastructure Managers (IMs) in Europe. The Railway Infrastructure System (RIS) combines previously existing systems into one platform, while maintaining their dedicated public access to the three systems: Central Reference Files Database (CRD), Customer Information Platform and Rail Facilities Portal (RFP).

The Railway Infrastructure System also uses data from the [Register of Infrastructure \(RINF\)](#), hosted by the European Union Agency of Railways.

Network and Corridor Information System

In 2024, the RFCs and IMs under the RNE umbrella continued work on the Network and Corridor Information Portal (NCI), which is a free of charge, digital solution to provide information on Network Statements (NS) and Corridor Information Documents. The latest developments are improvement of the visual side of the platform and the ability to import charts from Excel. The other achievement in 2024 was the publication rate which for Network Statements is 82.6%, while the Corridor Information Documents (CIDs) have achieved 100% publication rate. Further developments and improvements to the platform are envisaged for 2025 and launch of an animated promotional video has been foreseen.

RNE Railway Collaborative Decision-Making pilot project

In 2024, RNE and RFC representatives continued work on the RNE Railway Collaborative Decision-Making pilot project. However, because of the changes in RNE the developments were slightly postponed. The aim of the project is the elaboration of the RNE R-CDM Handbook and the development of the RNE R-CDM tool as a common platform.

3.2 RFC NETWORK

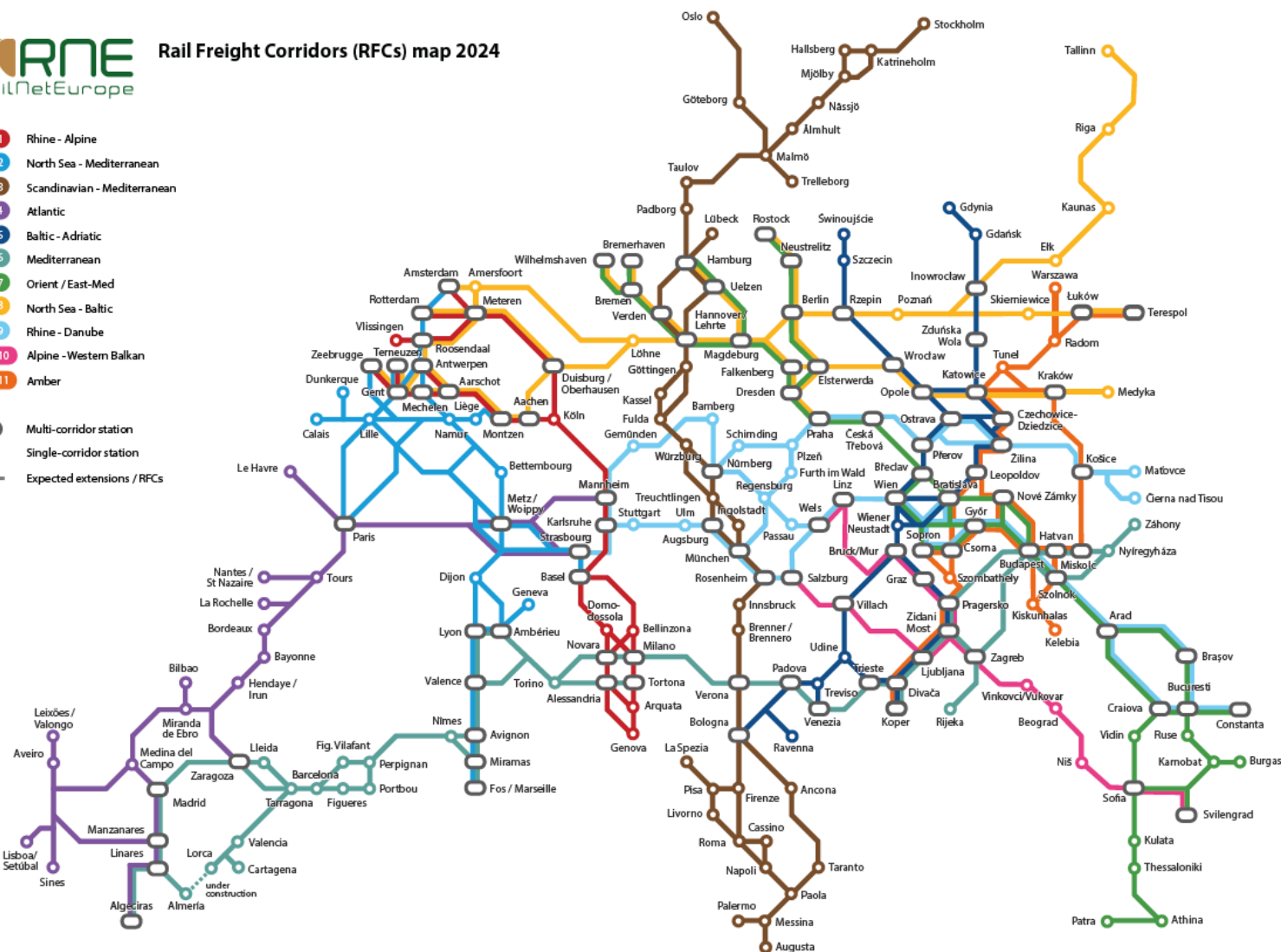
The RFC Network is a platform for cooperation of all 11 Rail Freight Corridors. It consists of the Managing Directors and Chairpersons of the Management Board of the RFCs with RNE representatives invited to participate as observers. The RFC Network is supported by the RFC Network Assistant, Nuria Pérez Brandón. In 2024, three online and two physical RFC Network meetings were organized in which RFC NS-B participated. Topics discussed were the Deliverables 2024 for the Technical Assistance (CEF II) and discussed transition period from RFCs to ETCs. In 2024, the RFC Network continued to work on joint RFC Network projects to be performed in the coming years with the support of EU funding such as Transport Market Study. The C-OSS Community topics and TEN-T operational priorities were also discussed. The RFC NS-B representatives have been involved in the elaboration of several projects, among others the European TMS Project, User Satisfaction Survey and RFC Marketing. The RFC Network is presented on the map on the next page.



Rail Freight Corridors (RFCs) map 2024

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

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



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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 17th of September 2024 in Vienna. The RFC NS-B RAG Speaker participated in the meeting.

The participants discussed:

- RAG organisation: reducing cost and engaging local operators;
- Future consultation process in 2025-2029;
- Commitment of RU to RAG;
- TAG relation and joint TAG meetings;
- TCR communication and TCR tool.

3.3 DG MOBILITY AND TRANSPORT

The RFC Network, NExBo and EC organised a Workshop on the transition from RFCs to ETCs on 26th of June 2024. The workshop focused on the extension of RFCs to non-EU countries, possible roles of RFCs in supporting the ETCs and a possible CEF programme for IMs and RNE.

As for the extensions to non-EU countries, there is no legal basis to oblige any actors outside the EU to comply with EU legislation unless there are agreements established. Cooperation with those countries should take some pragmatic forms, like EU-Ukraine Solidarity Lanes initiatives and participation in the Corridor fora of the European Coordinators. RFC representatives presented their views on the possible roles in which RFCs can support the ETCs. EC representatives found it very useful, especially the tasks that are linked to Art. 19 of the TEN-T regulation.

3.4 REGULATORY BODIES

The annual meeting with the Regulatory Bodies (RB) of the RFC NS-B took place online on the 14th of March 2024. During this meeting, the C-OSS Manager provided information about the results of the allocation process for TT2024, as well as the preparation of the capacity offer for TT2025. The RBs were informed about the handling process of the capacity wish list and analysis of the offer for TT 2023. The challenges on RFCs were presented, the RFC NS-B confirmed that the Annex VII processes are being implemented and have a positive impact in all member countries. The C-OSS Manager gave a live demo of the TCR Tool test version. Additionally, a report about the main conclusions of the user satisfactory survey 2023 and views regarding the proposed capacity management regulation were discussed.

4. ETC CORRIDOR FORUM

With the revised TEN-T Regulation in place, RFC NS-B will continue to work even closer with the European Coordinator, Ms Trautmann, who was reconfirmed as Coordinator for the new ETC North Sea-Baltic Corridor in September 2024. .

The 1st official Meeting of the new North Sea – Baltic European Transport Corridor Forum was organised on 22nd of November 2024 in Brussels.



The main topics discussed were the political priorities of the new European Commission in the transport area, the result of the CEF 2023 call and the role of RailNetEurope in the frame of the future capacity management regulation. M. Ruete, the European Coordinator for ERTMS, one of the horizontal priorities, presented the state of deployment of ERTMS in the EU and specifically on the NS-B Corridor.

The Consultant team presented the work and tasks ahead for the preparation of the new work plan of the European Coordinator.

5. OUTLOOK 2025

5.1 IMPLEMENTATION OF AMENDED 913/2010 REGULATION

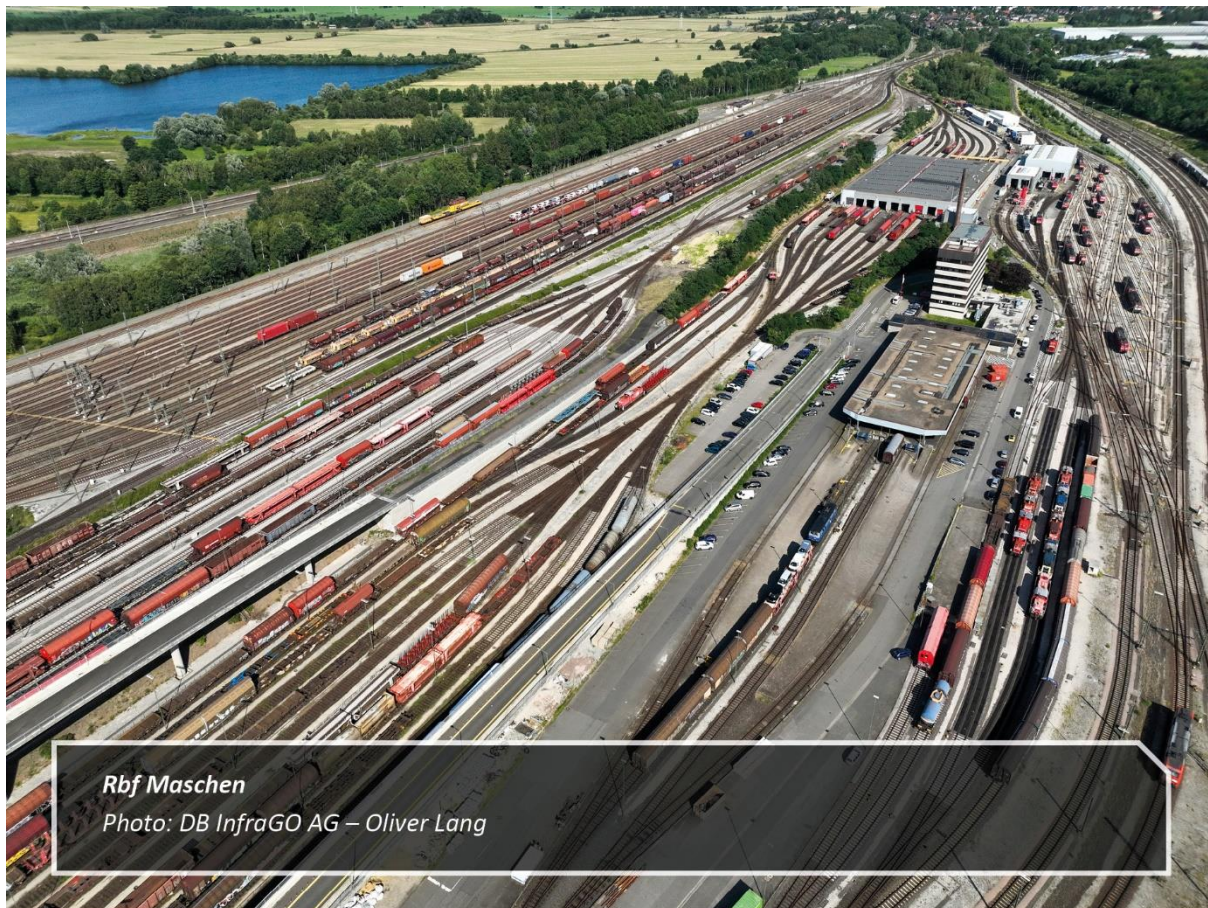
The year 2025 marks a crucial transitional phase for RFC NS-B, as preparations intensify to ensure full operational readiness under the new framework introduced by the Regulation (EU) 1679/2024. This Regulation re-shaped the structure of the trans-European transport network, necessitating both strategic and practical adjustments.

A key priority for 2025 is the establishment of the new governance structure in line with the new routing. This includes adapting the Executive Board and Management Board and organise

the enhanced role of the Advisory Groups. These efforts are aimed at ensuring the Corridor is fully operational by January 2026.

In order to achieve this, the Corridor is committed to delivering the new Implementation Plan in July 2025. This document will serve as a strategic reference with the ETC framework.

The year ahead will focus on translating the new legal framework into the practical implementation and consolidating stakeholder engagement.



List of Abbreviations

AB – Allocation Body

AG – Advisory Group

BCP - Border Crossing Point

CBA - Cost Benefit Analysis

CEF – Connecting Europe Facility

CID – Corridor Information Document

CINEA – European Climate, Infrastructure and Environment Executive Agency

CIP – Customer Information Platform

C-OSS – Corridor One-Stop-Shop

CRD - Central Reference Files Database

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

HaP- Harmonized paths

ICM – International Contingency Management

IM – Infrastructure Manager

KPI – Key Performance Indicator

MB – Management Board

NCI - Network and Corridor Information System

NExBo – Network of Executive Boards of RFCs

NS – Network Statement

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 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

SGKV e.V. - Studiengesellschaft für den Kombinierten Verkehr e.V. / Study Society for Combined Transport eV

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

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