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Marketing Evolution

fresh thinking for powerful marketing

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



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RFC User Satisfaction Survey 2016

Report for RFC 8



Rail Freight Corridor
North Sea – Baltic



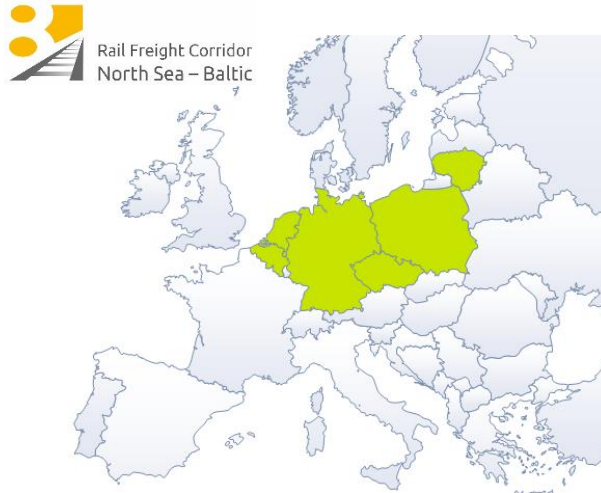
Co-financed by the European Union
Connecting Europe Facility

October 2016

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1 Study Design

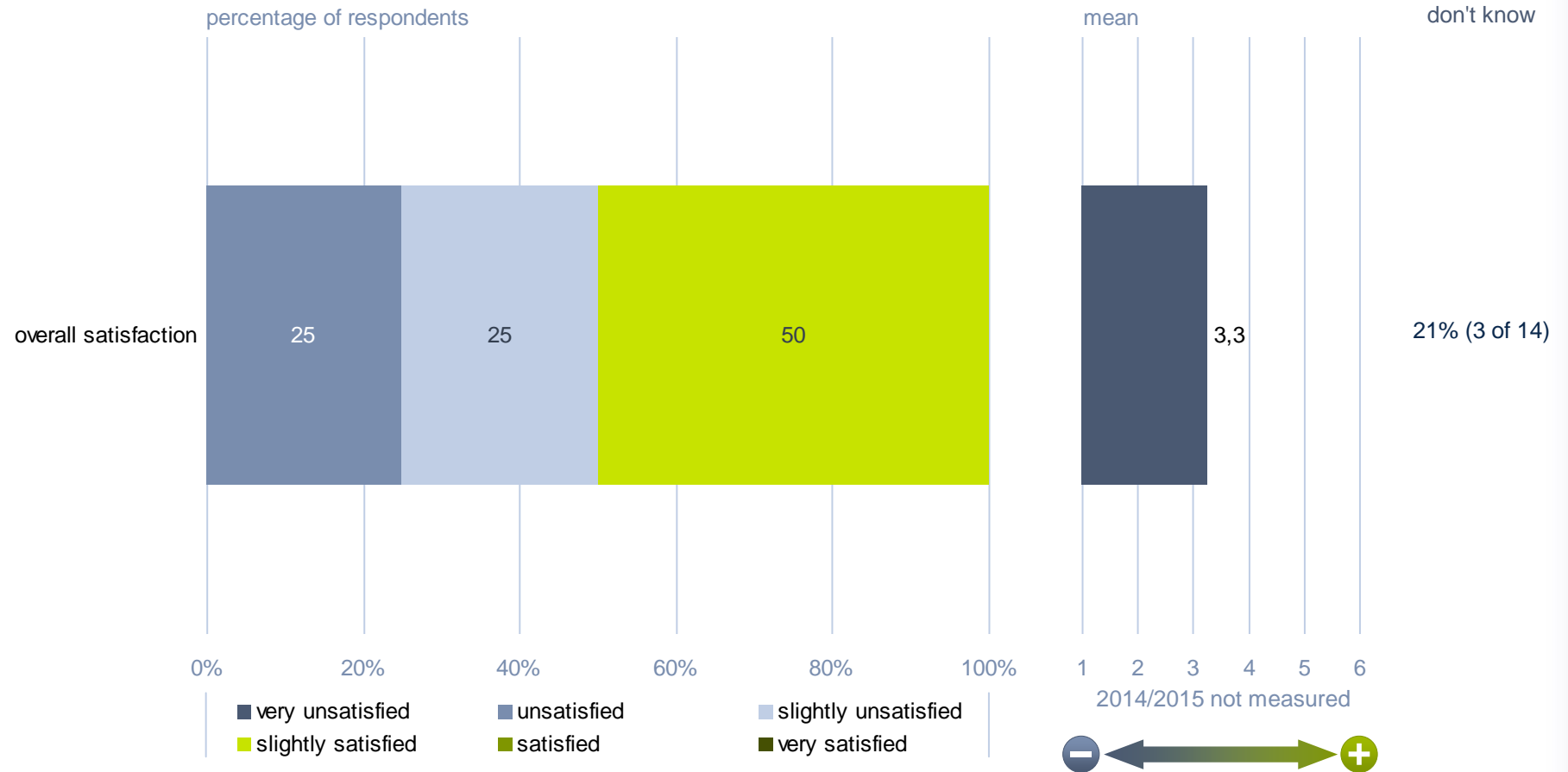


- ▶ **14 respondents**
 - 14 RFC8 users / 0 non-users
 - 12 full interviews / 2 partial interviews
 - 9 nominated by RFC8 / 5 nominated by other RFCs
 - 2 agreed to forward name
 - 2 used topic-forward
- ▶ Computer Aided Web Interviews (CAWI)
- ▶ Contacts (e-mail address) delivered by RFCs
- ▶ 41 e-mail invitations sent
- ▶ Field Phase: 13 September to 7 October 2016

Attention: very small sample sizes!



2 Satisfaction with the RFC



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

n = 14

one overall TAG meeting for all corridors; this would ensure a coherent treatment of topics

use of the plate as tail signal should be possible in Belgium

ministries should take over more responsibility to solve problems they are in charge like longer trains (financing of longer tracks)

a cross-corridor coordination and consultation process together with RU should be set up

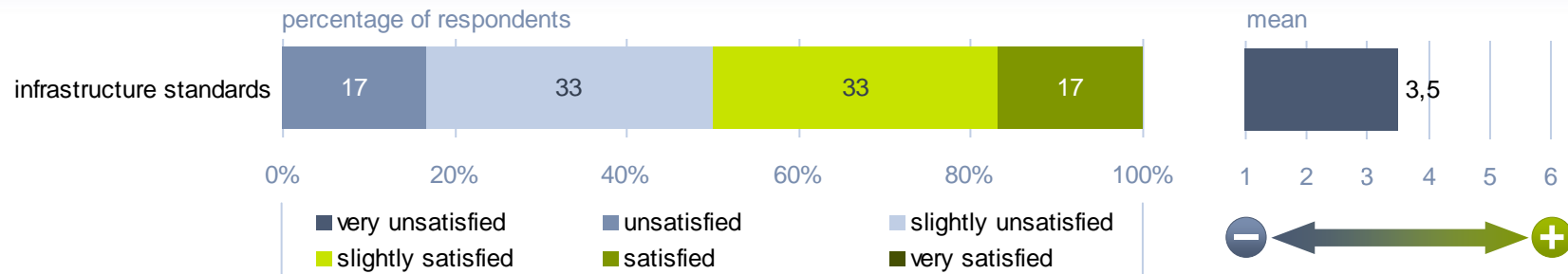
an official body (e.g. Executive Board) should approve that process and eventually establish a regularly reporting

development of ETA on the whole corridor

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



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



very unsatisfied/unsatisfied

the train length is too small

slightly unsatisfied or better

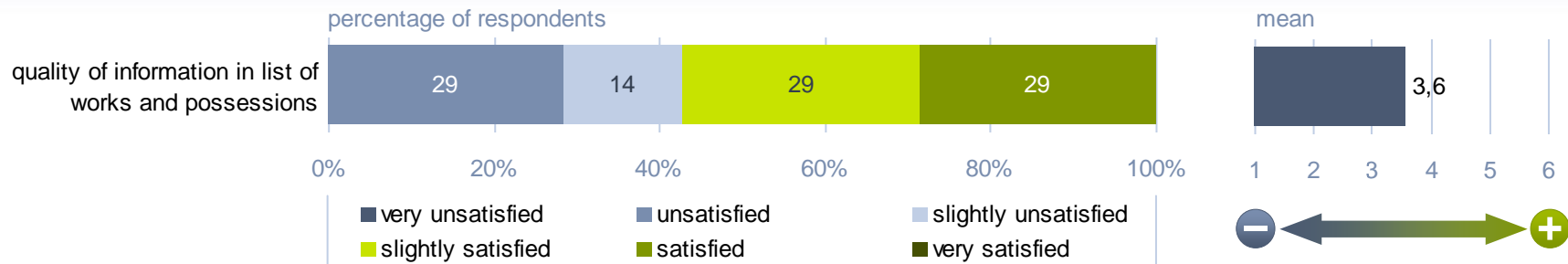
in Poland only axle load D 2

for combined traffic no codification (P/C)

the lines defined for RFC by PKP PLK are not optimal for transport

"If you are 'unsatisfied' or 'very unsatisfied', please specify the main reasons?"

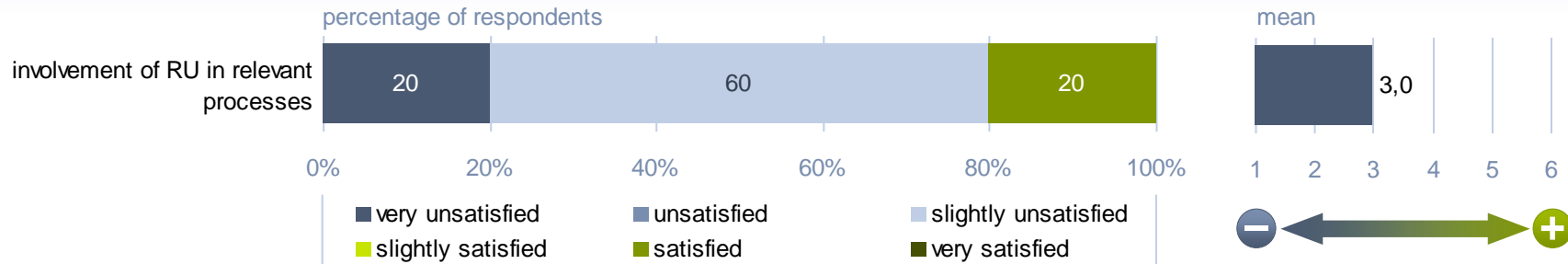




very unsatisfied/unsatisfied

slightly unsatisfied or better

Involvement of RU in relevant processes || criticism/suggestions || open question



very unsatisfied/unsatisfied

the process agreed by RNE is not respected; we virtually cannot identify any process of coordination

"If you are 'unsatisfied' or 'very unsatisfied', please specify the main reasons?"

better possibilities to combine BE-RO traffic

coordination between neighboring IMs

more and direct communications

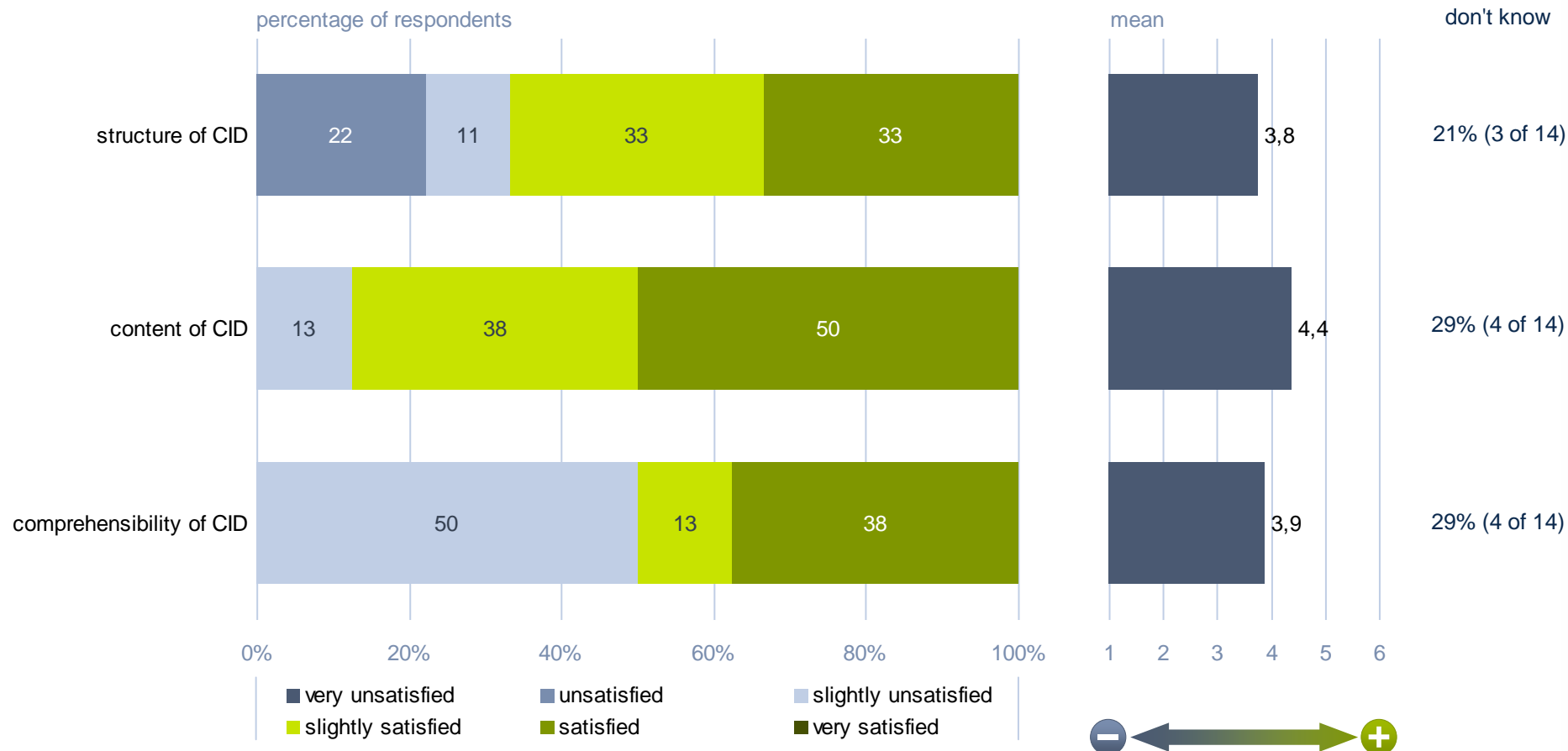
RUs should be invited to coordination meetings of the IMs at a moment where the planning of restrictions can still be influenced

taking into account the opinion of customers in the process of planning for closure, ingested technology works and securing diversionary routes

keeping the deadline, which were published

"Do you have any ideas for improvement of the coordination of planned temporary capacity restrictions (works and possessions)?"

Satisfaction with Corridor Information Document (CID)



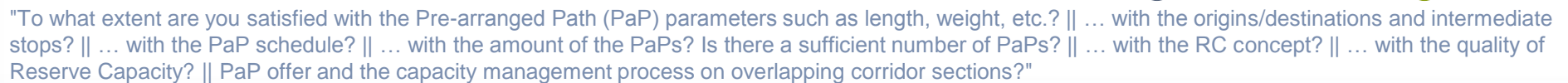
"To what extent are you satisfied with the structure of the CID for the 2017 timetable year? Can you easily find the information you want? Is the information organized in a logical way? || ... with the contents of the CID? Do the contents match your business needs? Is the level of detail sufficient? || ... with the comprehensibility of the CID? Is the wording clear and user-friendly? Are there enough graphical elements (where clear illustration is required)? Is the CID layout/design attractive?"

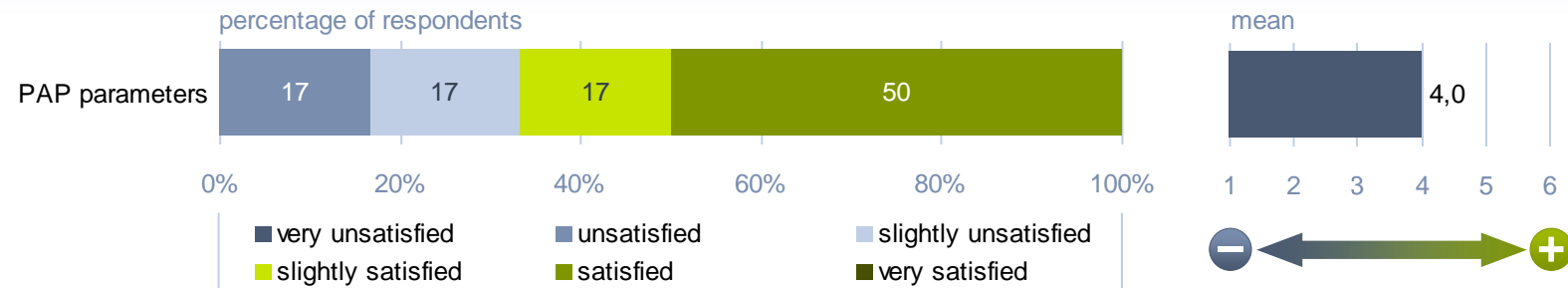
version in mother language, or in other languages

optimize the information about construction works

better possibilities to combine BE-RO traffic

"Do you have any ideas for improvement of the CID?"



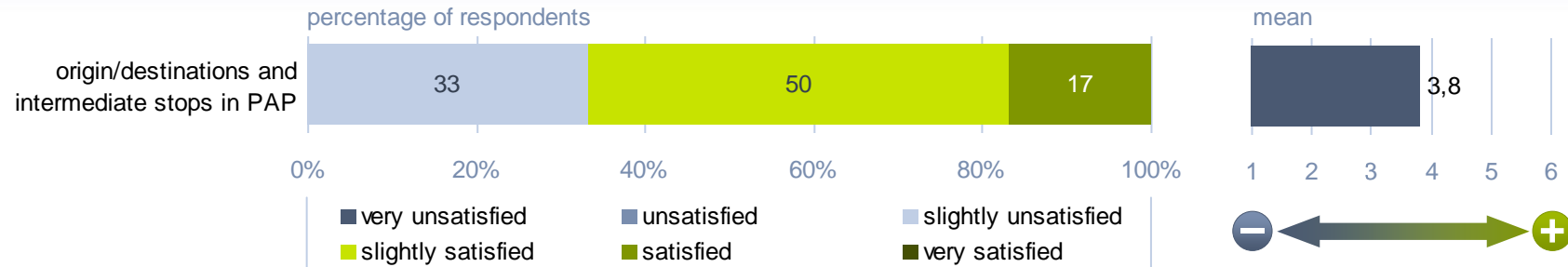


very unsatisfied/unsatisfied

PKP PLK part of the corridor is unattractive compared with the possibilities offered by the infrastructure

"If you are 'unsatisfied' or 'very unsatisfied', please specify the main reasons?"

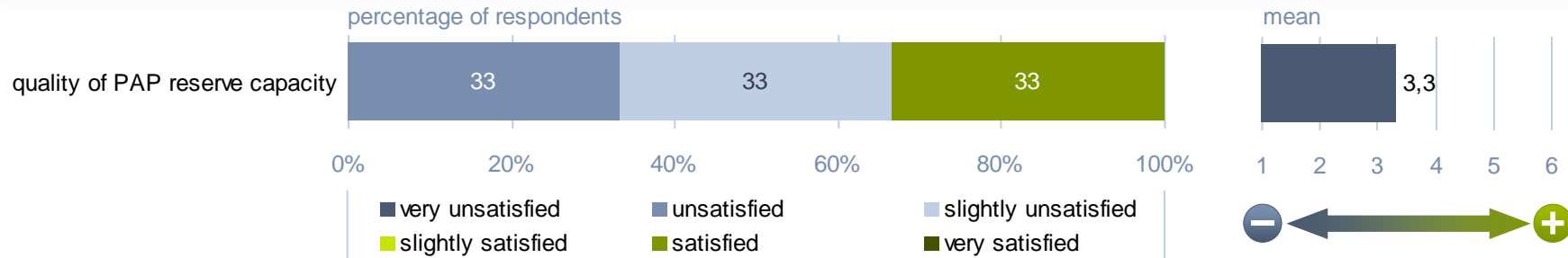
origin/destinations and intermediate stops in PAP || criticism/suggestions || open question



slightly unsatisfied or better

no intermediate stops for the drivers

"If you are 'unsatisfied' or 'very unsatisfied', please specify the main reasons?"



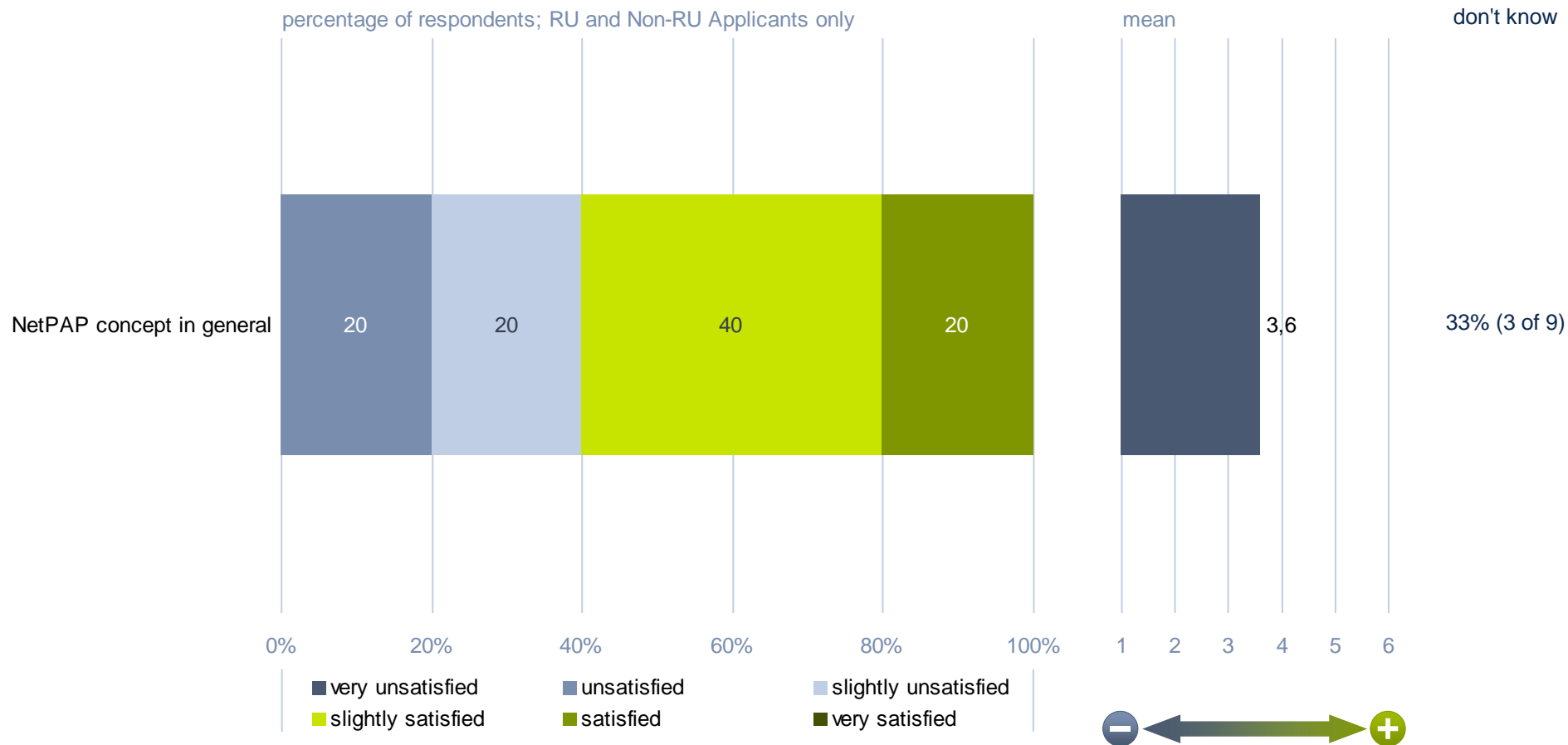
very unsatisfied/unsatisfied

Lack of flexibility on border crossings causes a lack of possibilities to adapt to the needs of the RUs; ad-hoc paths ordered in regular process are more flexible and adapted to the real needs

"If you are 'unsatisfied' or 'very unsatisfied', please specify the main reasons?"

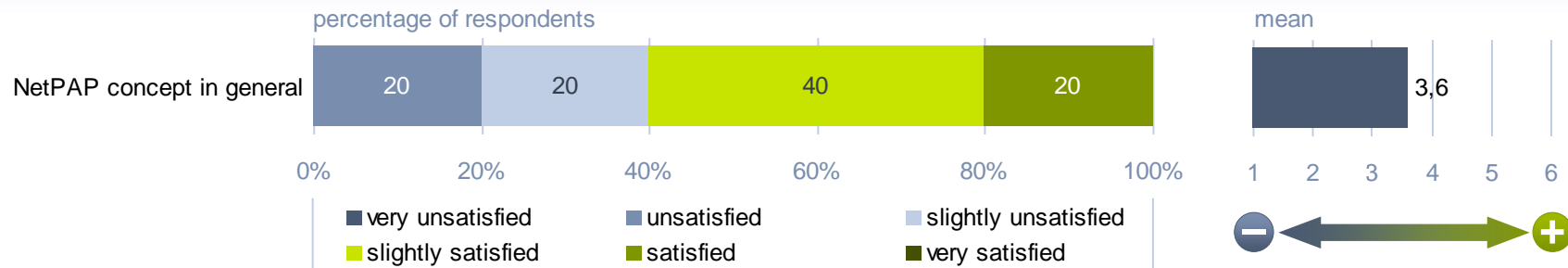


"To what extent are you satisfied with the flexible approach to arrival/departure times and the possibility to shift intermediate stops (FlexPAP concept)? || ... with the FlexPAP concerning running/stopping times and description? Is the indicated range of standard running times / maximum stopping times useful and is the description of the FlexPAP concept in CID 2017 sufficient?"



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

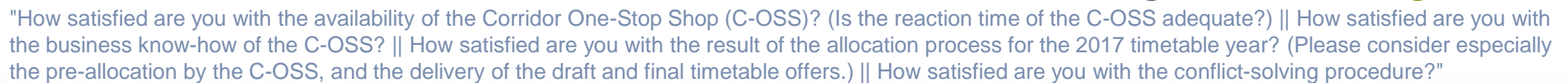
n = 9



very unsatisfied/unsatisfied

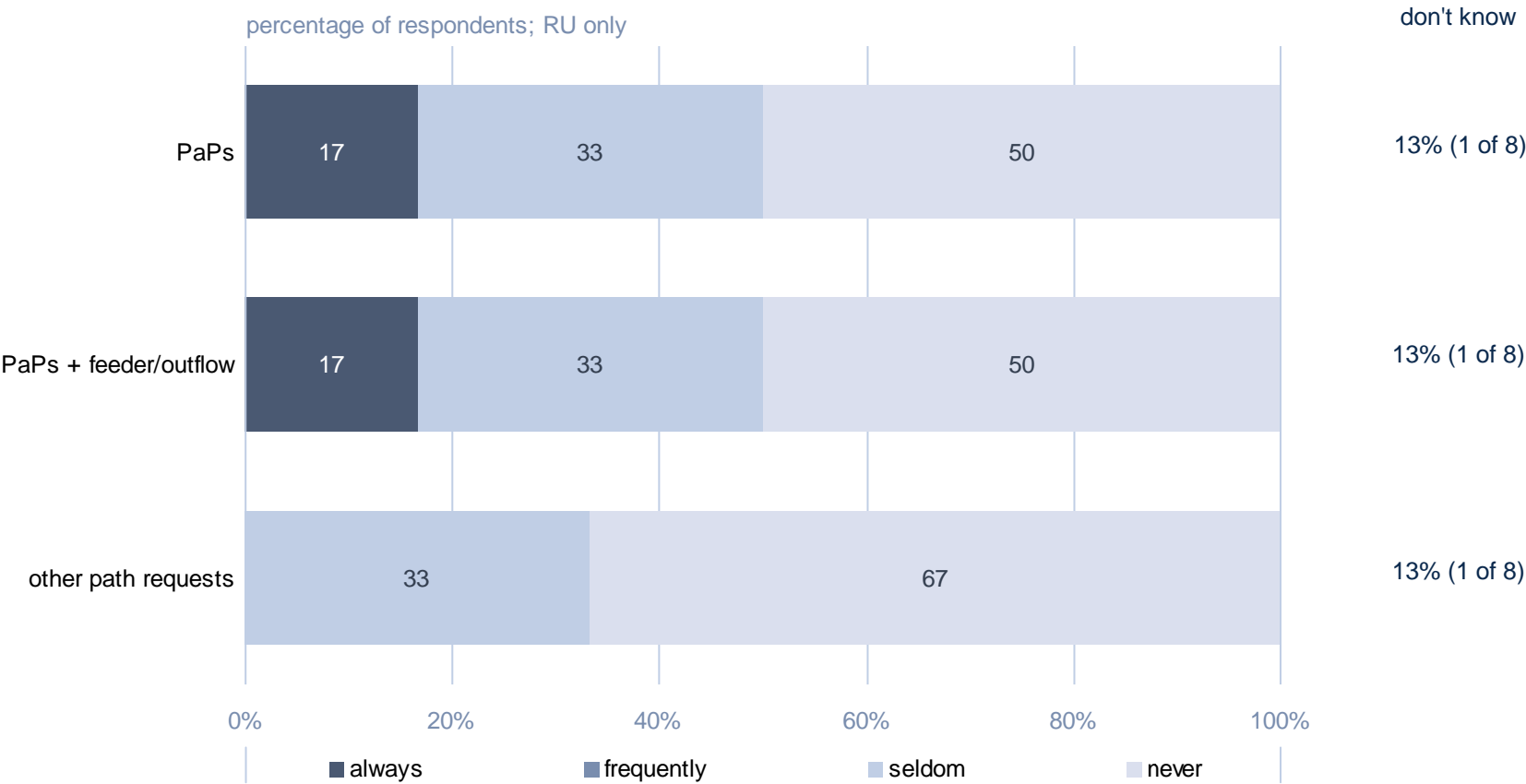
difficult to combine with BE departure

"If you are 'unsatisfied' or 'very unsatisfied', please specify the main reasons?"



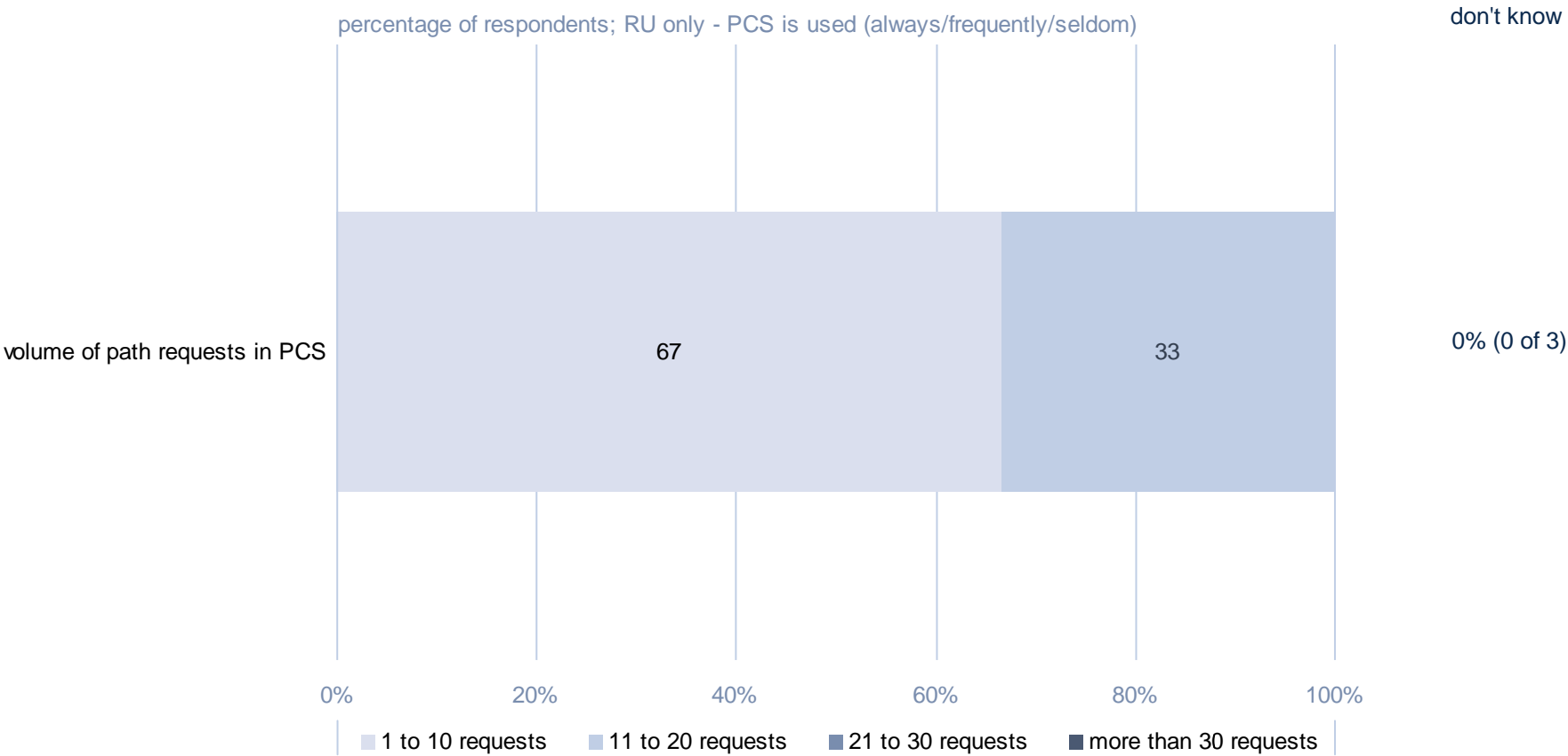
paths should be flexible also at border points which is particularly important in the case of routes exceeding more than one border crossing
allocation ad hoc, other capacity only 3 days before train running day

"Do you have any ideas for improvement to the PaPs and C-OSS?"



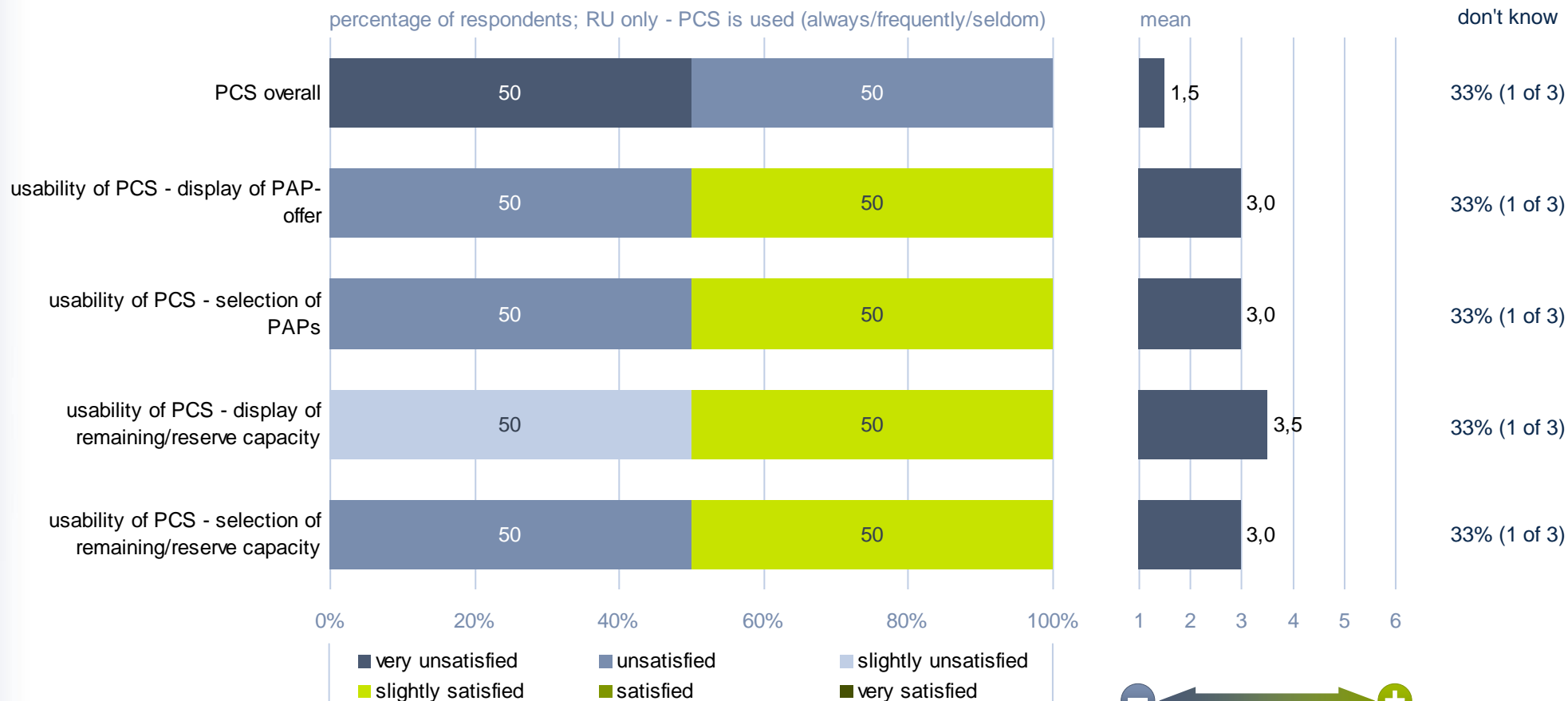
"How often does your company use the PCS booking tool for international path requests?"

n = 8

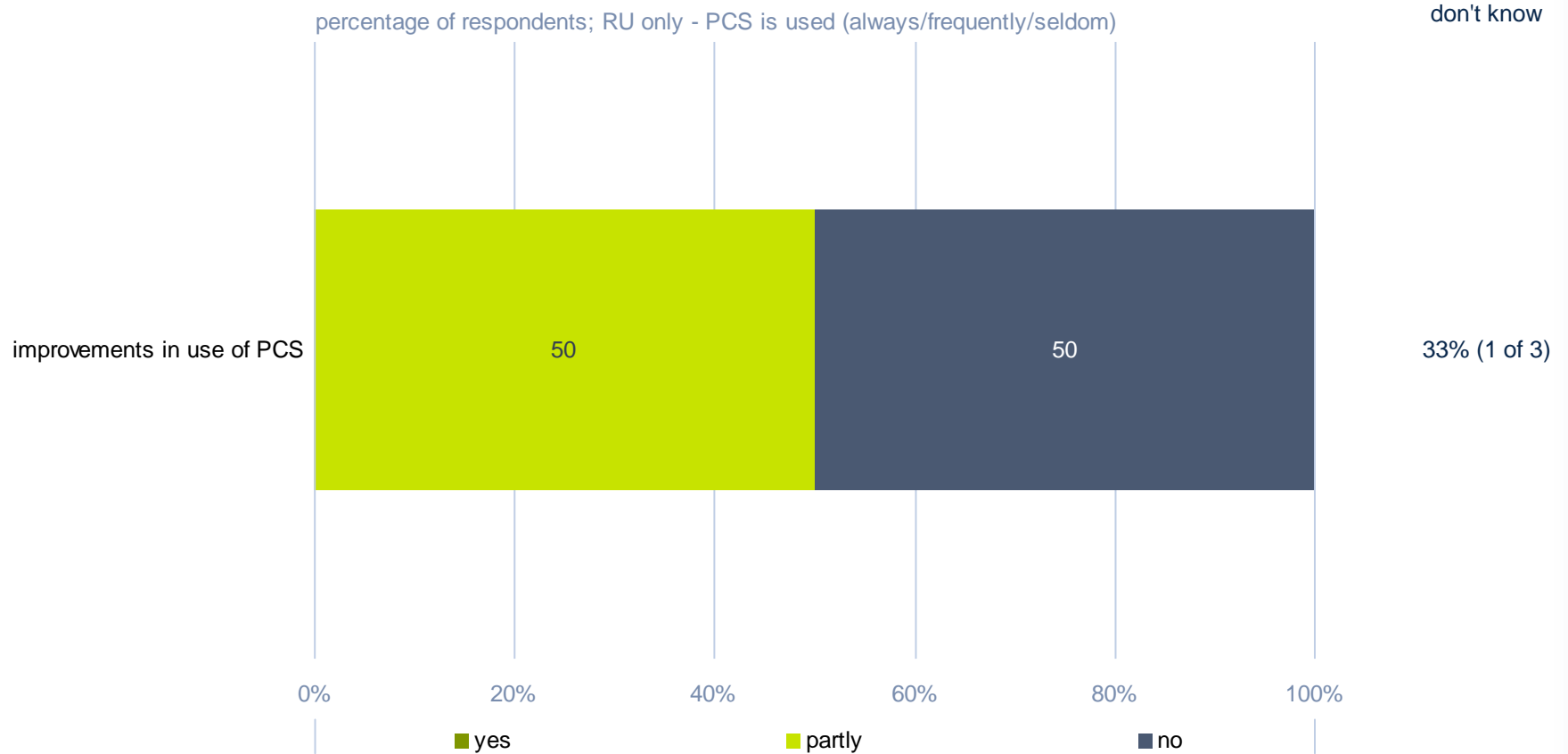


"What is the volume of path requests (dossiers) you placed in PCS for the 2017 timetable year?"

n = 3



"How satisfied are you all in all with PCS as a booking tool for international path requests? Does it match your needs? || ... with the usability of PCS concerning the display of the PaP-offer? || ... concerning the selection of required PaPs? || ... concerning the display of remaining / reserve capacity (late and ad-hoc path requests)? || ... with the usability of PCS concerning the handling of required remaining / reserve capacity (late and ad-hoc path requests)?"

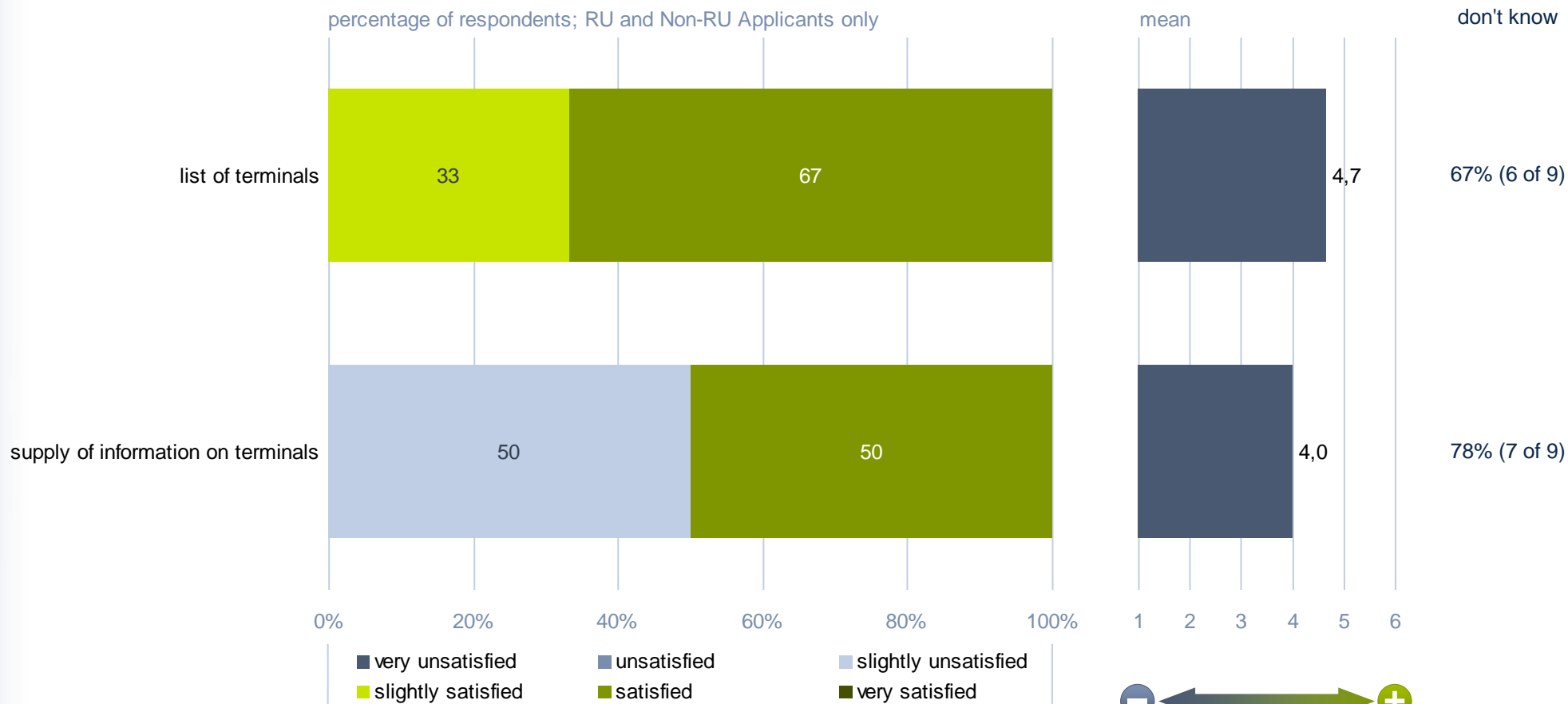


"On 25 January 2016 RNE released an overhauled version of PCS ("PCS Next Generation"). The new system is based on modern standards, its goal being to increase usability. Have you perceived any significant improvements in the use of PCS compared to the previous year?"

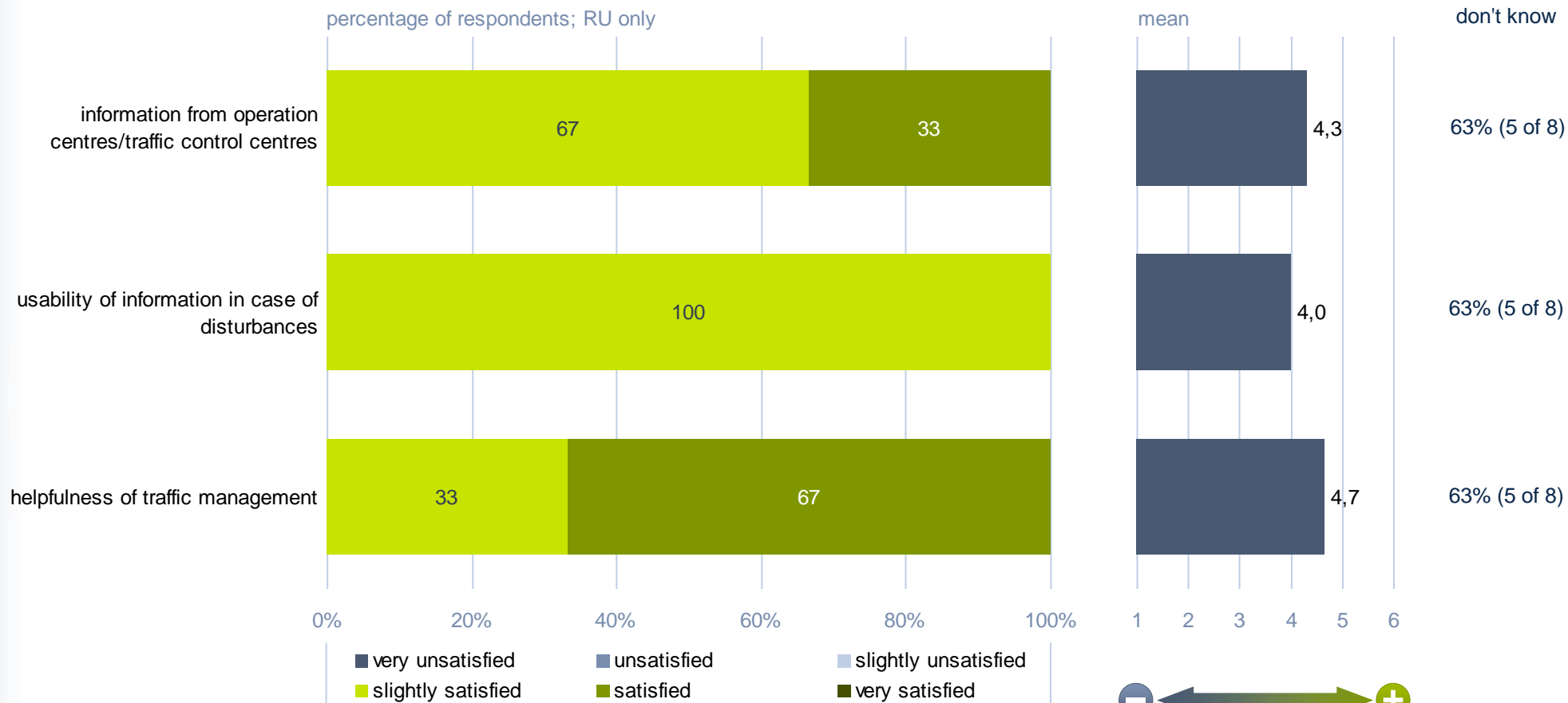
clarity of system

communication with national systems

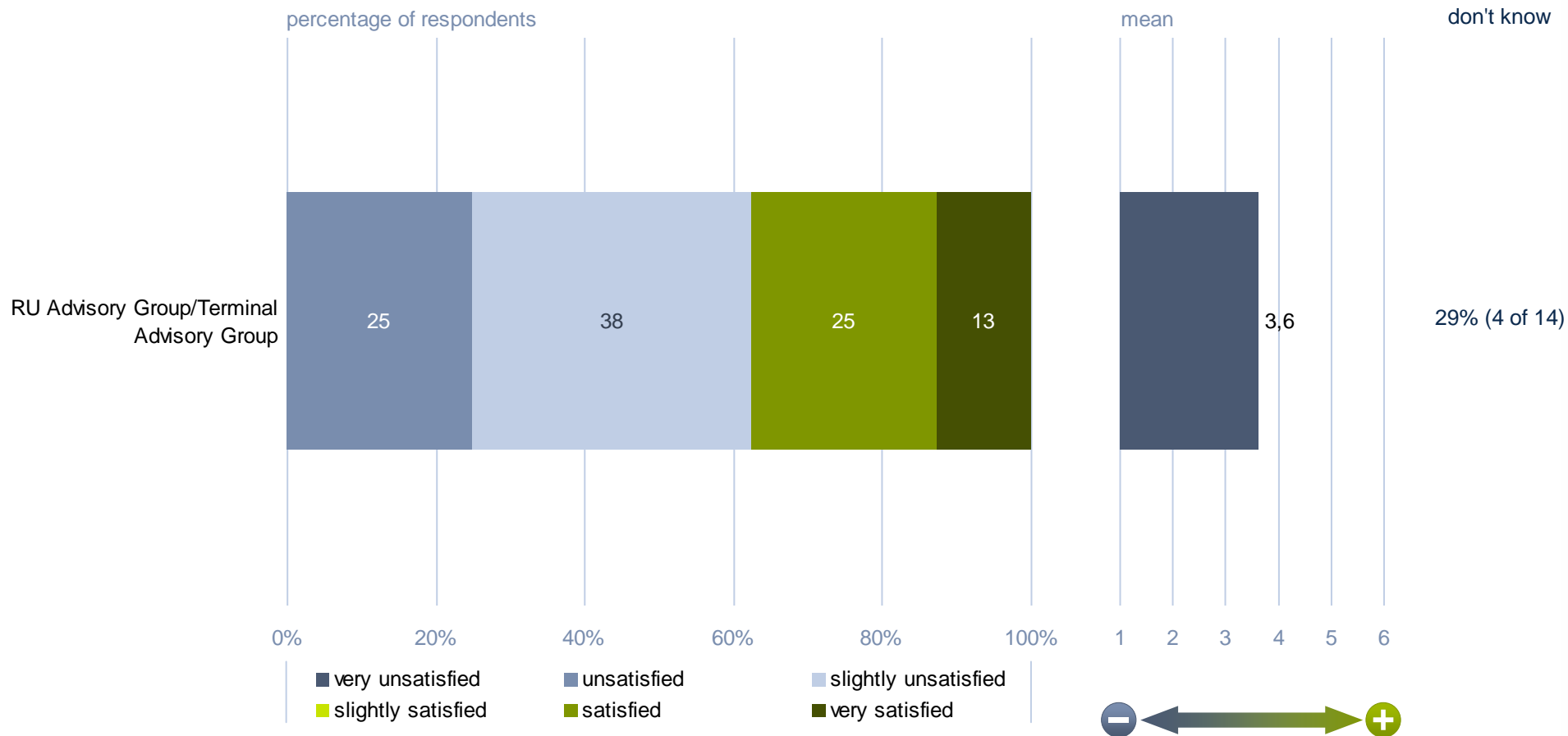
"Do you have any ideas for improvement to PCS?"



"To what extent are you satisfied with the list of terminals along the RFC that are provided by the RFC? Are all relevant terminals included in the CID 2017? || To what extent are you satisfied with the supply of information on terminals? Is the RFC supplying all relevant information on Terminals (either contained inside the CID 2017 or other sources)?"



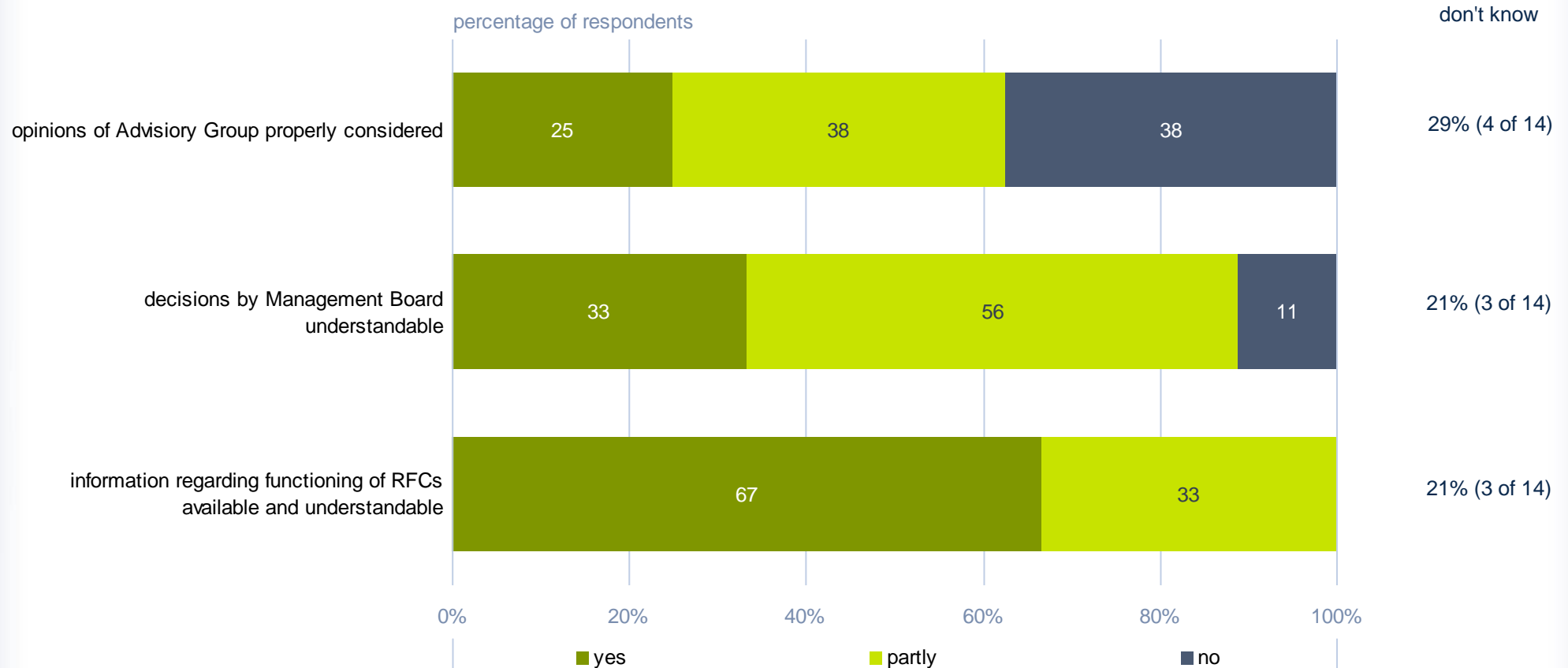
"How satisfied are you with the information you get from the different operation centres / traffic control centres of the IMs on the corridor while operating trains? || ... with the usability of the information you get from the operation centres / traffic control centres of the IMs on the corridor in case of disturbances? || How helpful is the Infrastructure Managers' (IMs') traffic management as regards running your trains with a high service quality?"



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

n = 14

Satisfaction with Co-operation with the RFC Management Board (2)



"Do you consider that the opinion of the Advisory Group has been properly taken into account by the RFC Management Board? || Are decisions taken by the RFC Management Board (that concern your business) understandable for you? || Is information regarding the functioning of the RFC easily available and understandable for you?"

communication about the RFC decisions and implementation of investments for the market players (potential users of the corridor) should be done in clearer way; what is in it for the shippers, for the logistical players, for the road haulers etc.

possibility to have an agenda point in the executive board meeting

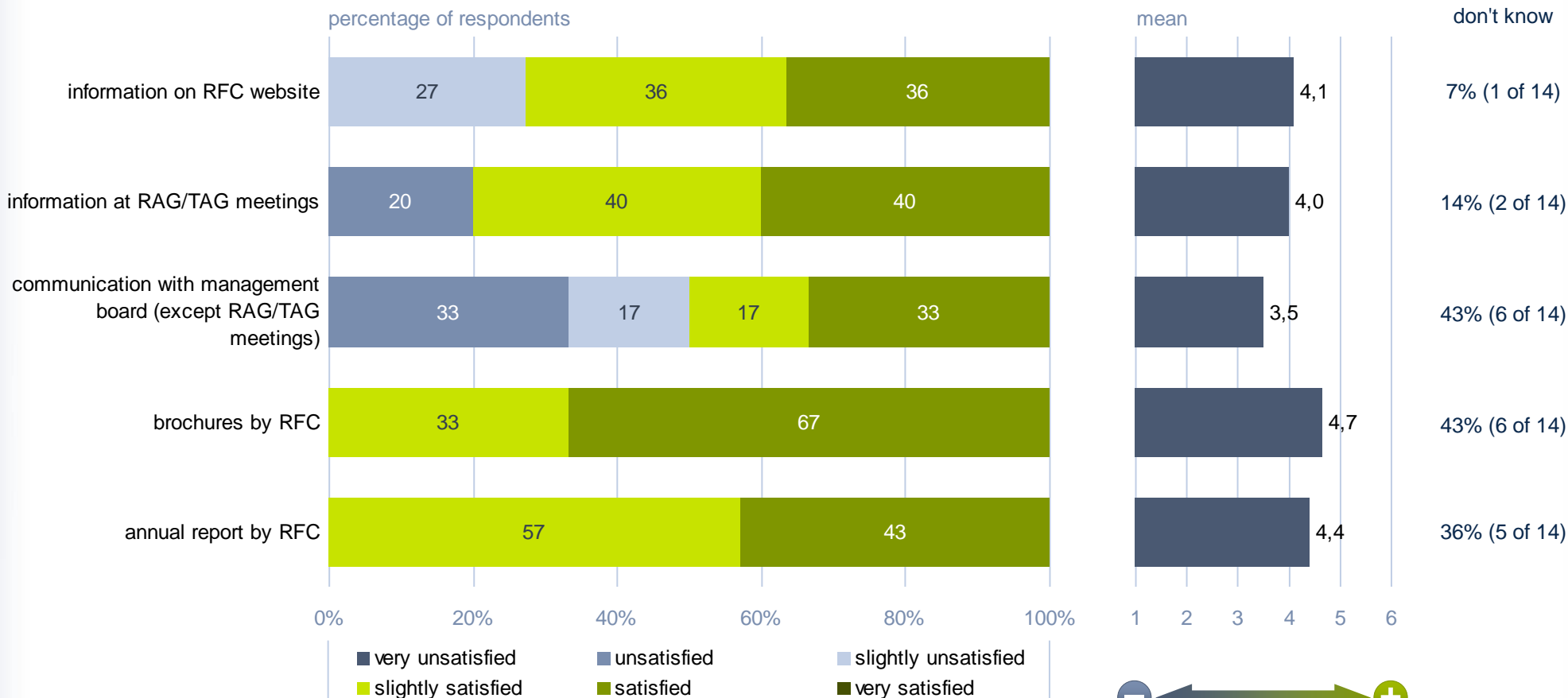
possibility to have an agenda point in the management board meeting

ERTMS developments to be aligned along the corridor

a harmonization challenge (operational processes & technical aspects) and a legal challenge (removal of redundant national rules)

the cost challenge is not explicitly addressed in the regulation but it should be the basic idea of the RFC concept

"Do you have any ideas for improving your involvement in the RFCs' activities?"



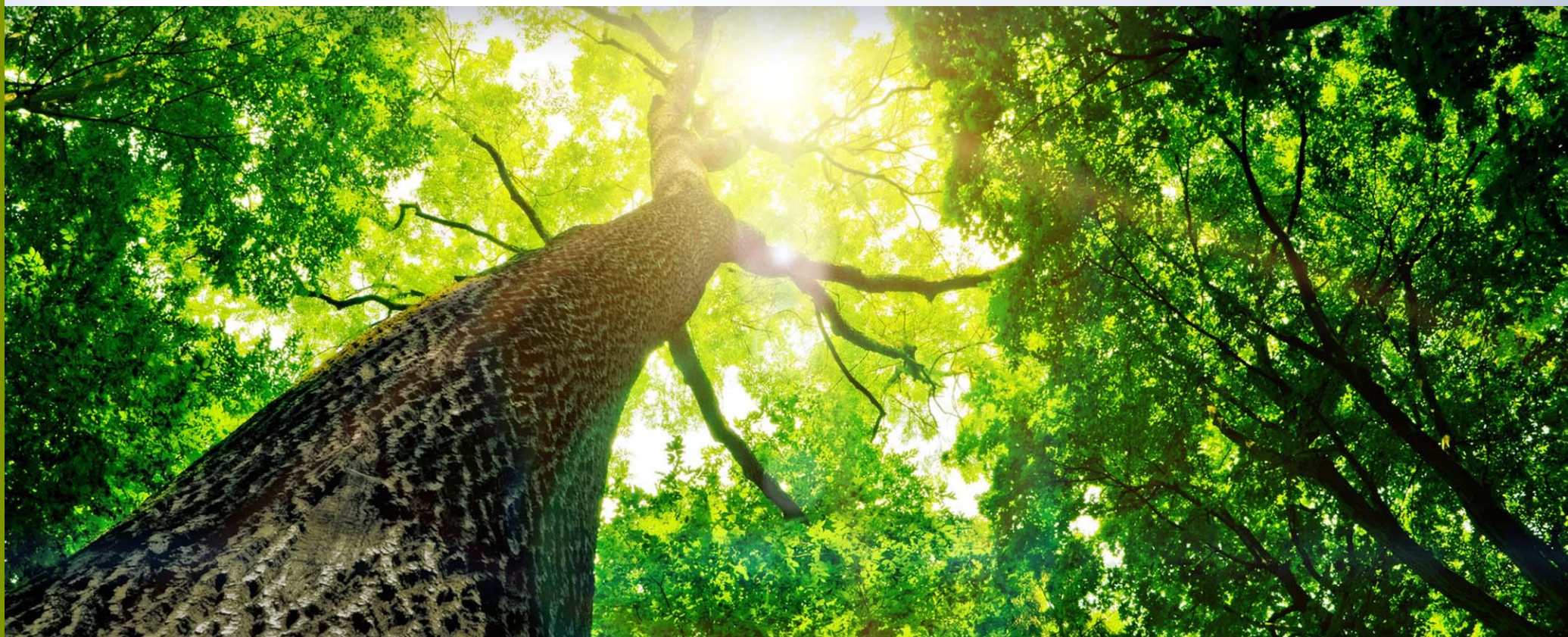
"To which extent are you satisfied with the information provided by RFC's website? || To which extent are you satisfied with the information provided by the RAG/TAG Meetings? || To which extent are you satisfied with the communication with the Management Board of the RFC other than at the RAG/TAG meetings?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

a harmonization challenge (operational processes & technical aspects) and a legal challenge (removal of redundant national rules);
the cost challenge is not explicitly addressed in the regulation but it should be the basic idea of the RFC concept

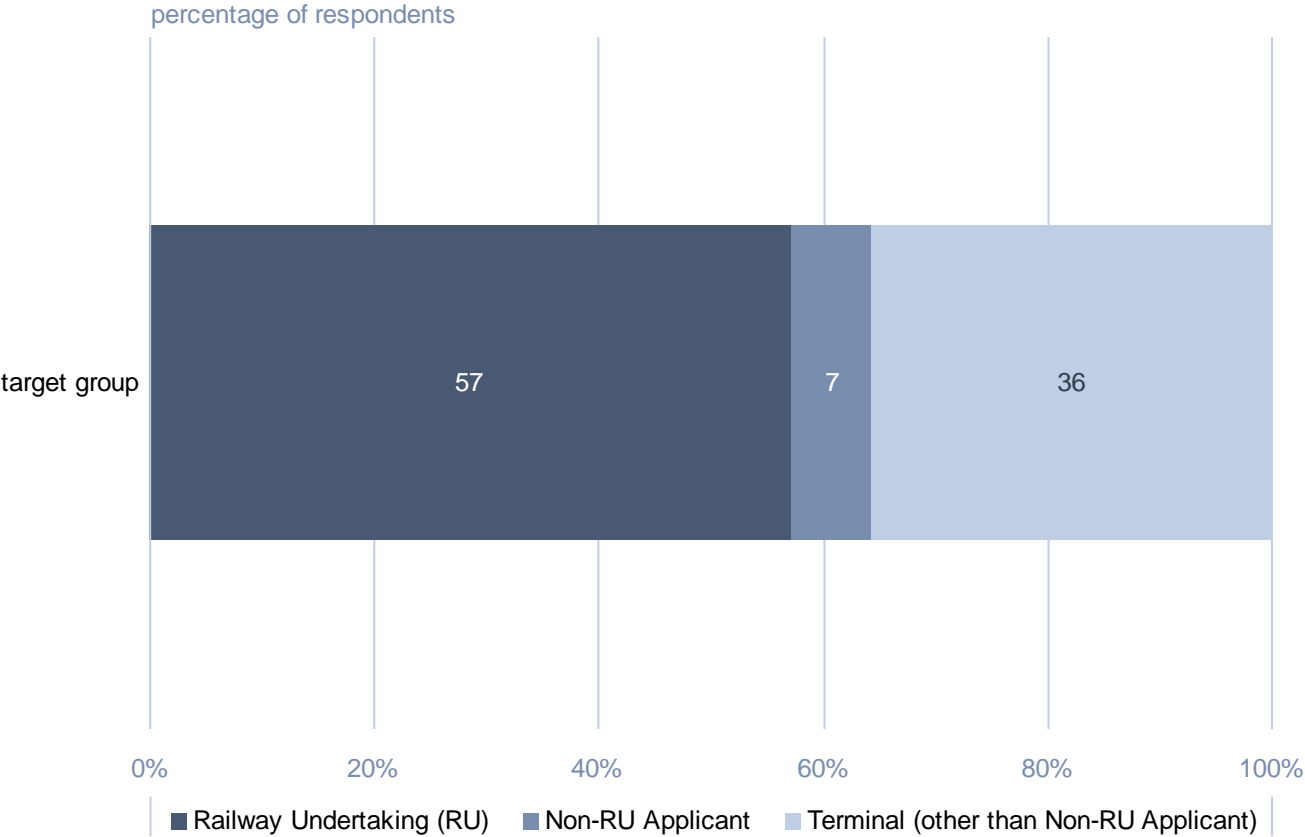
stronger involvement of Transport Ministries /Member States would help in overcoming national barriers to harmonization

more communication with C-OSS

"On which subjects would you like the RFC to communicate more?"

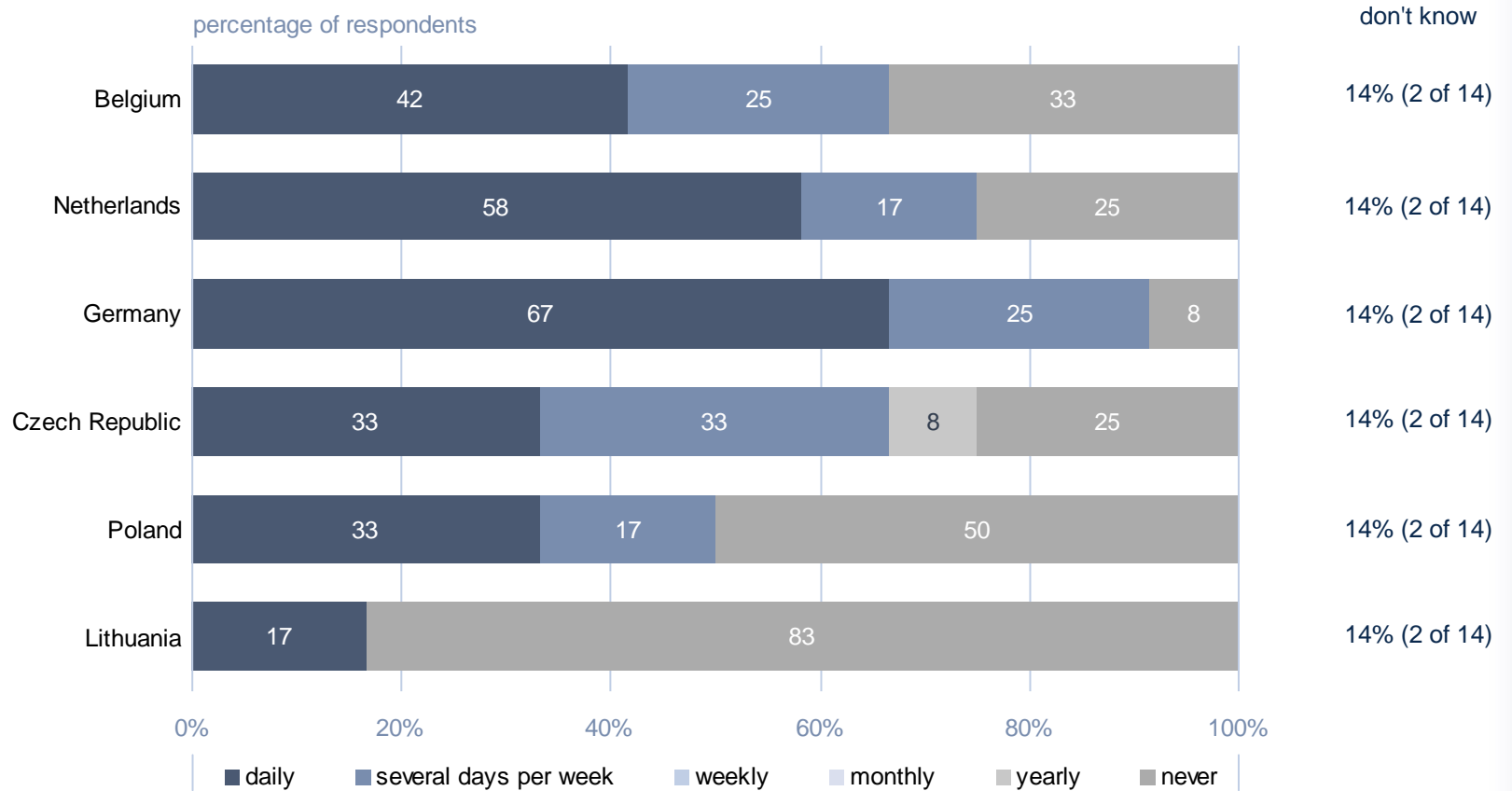


3 Sample Description



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

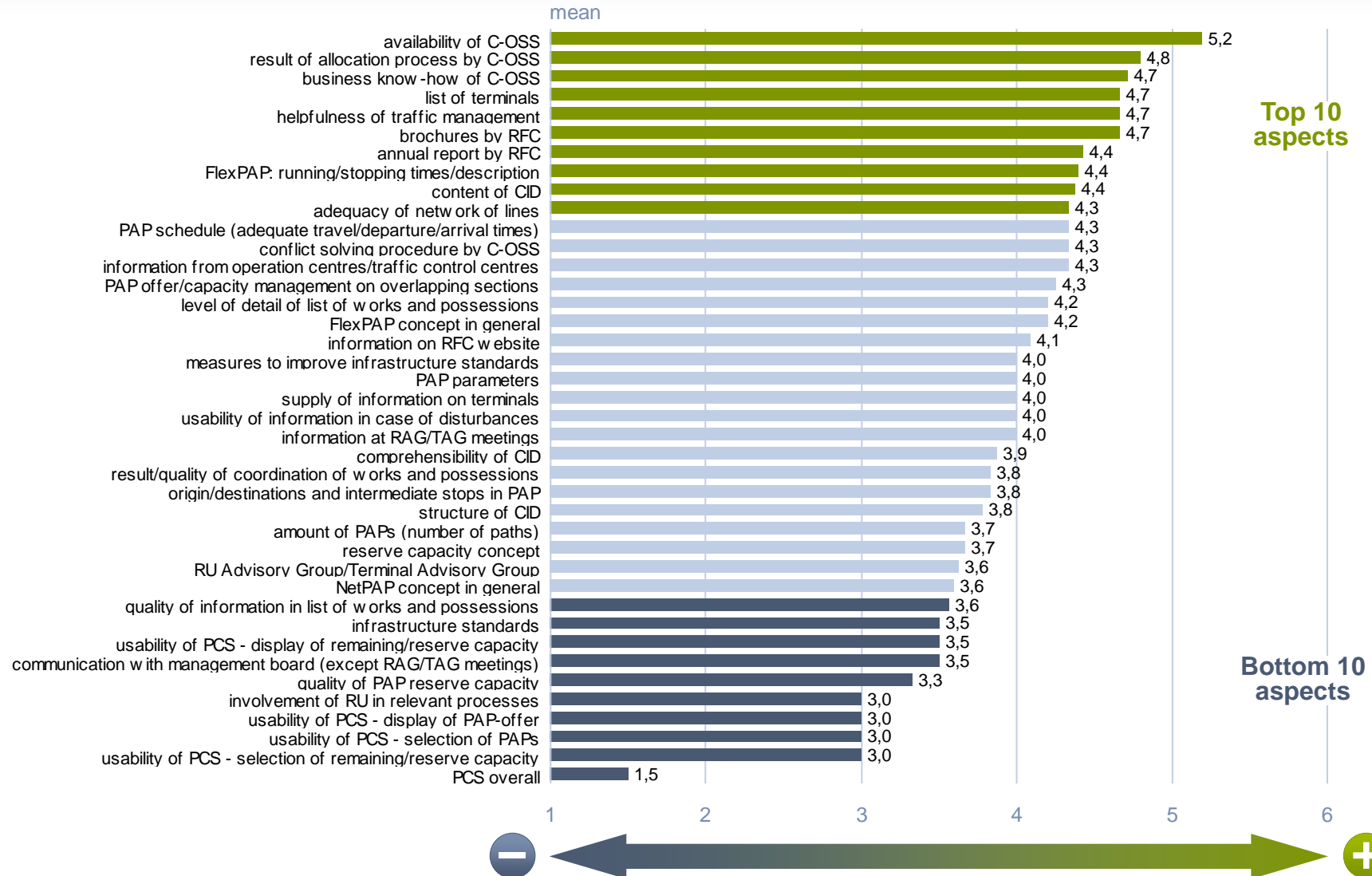
n = 14

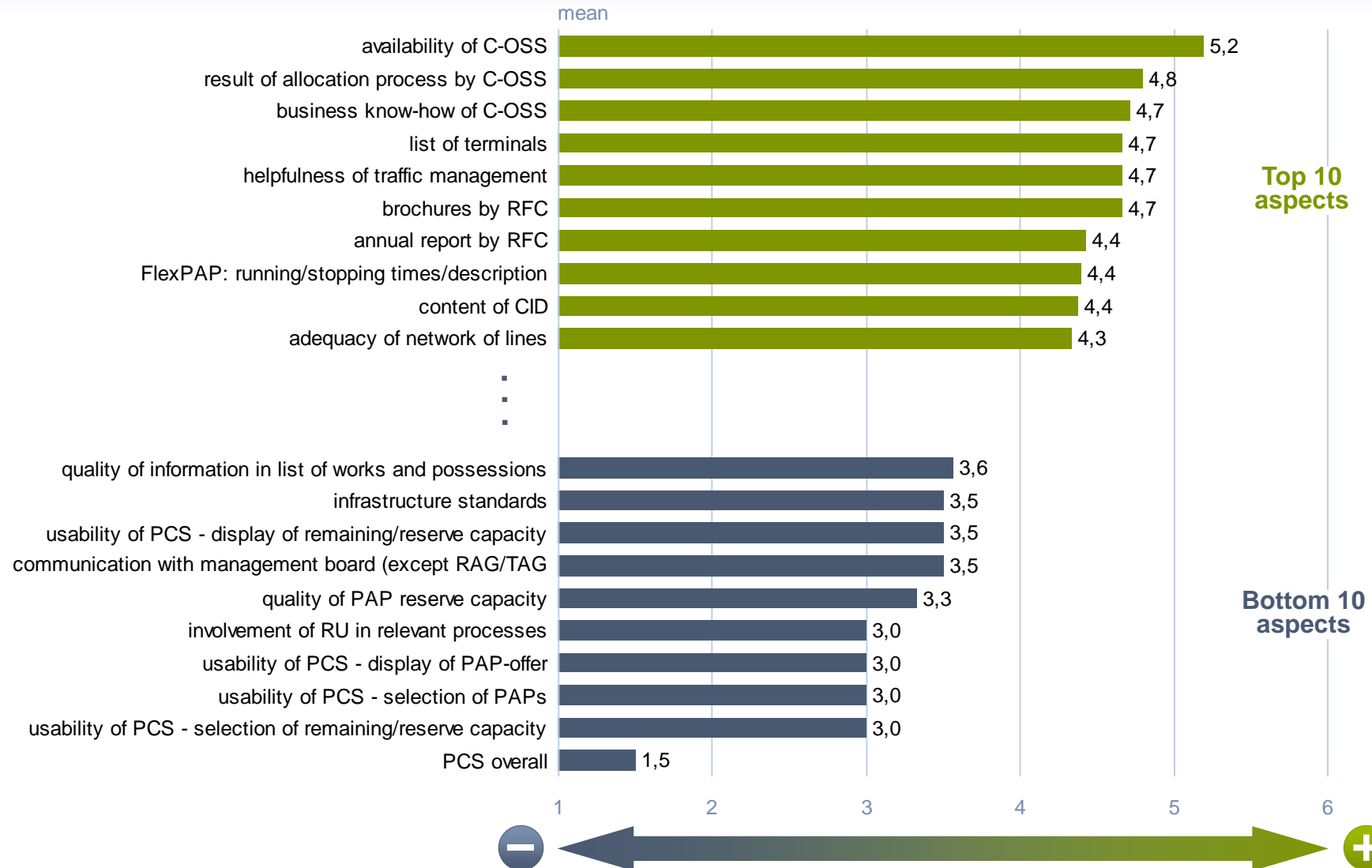


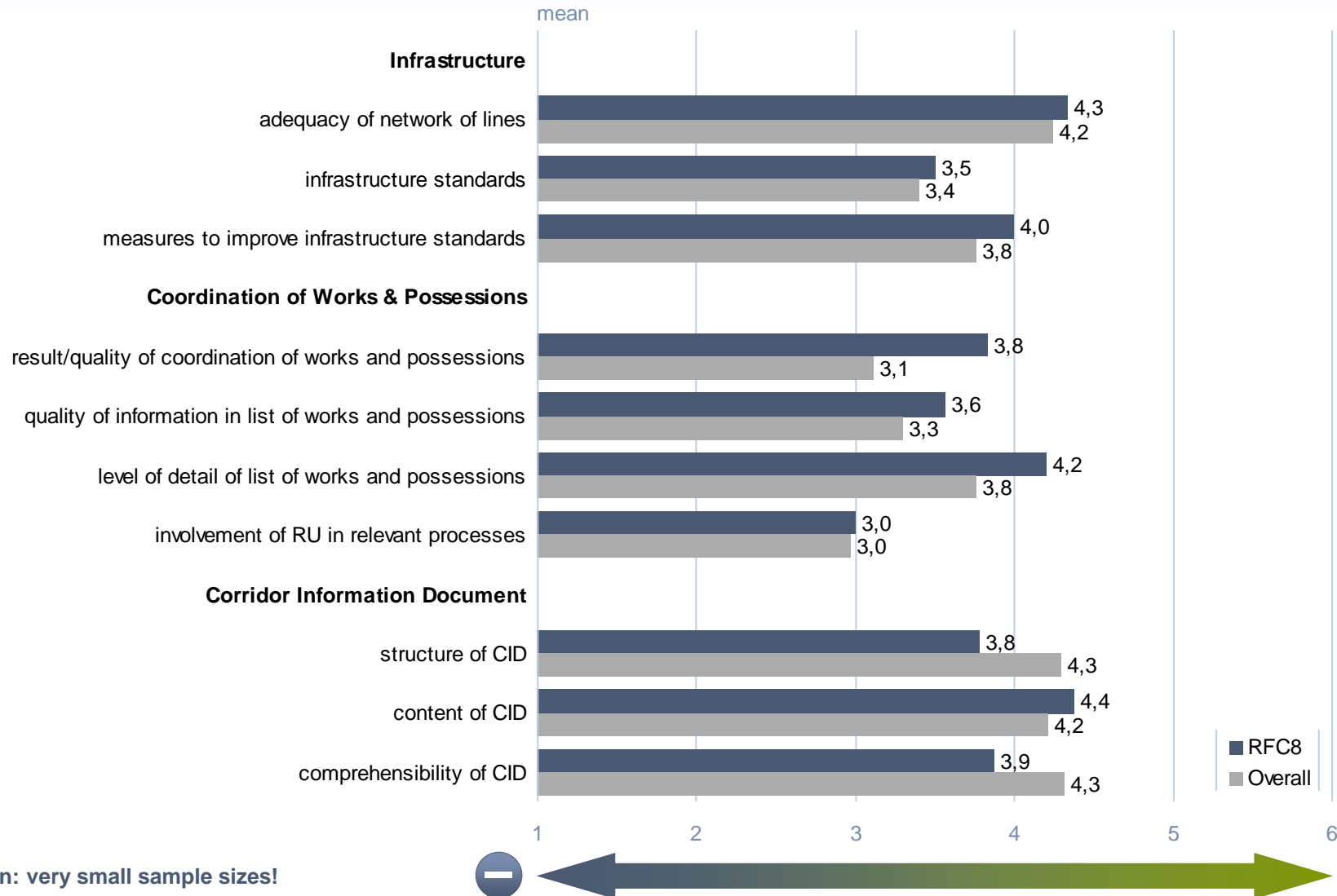
"How frequently does your company operate/run international services on the following sections of this corridor?"

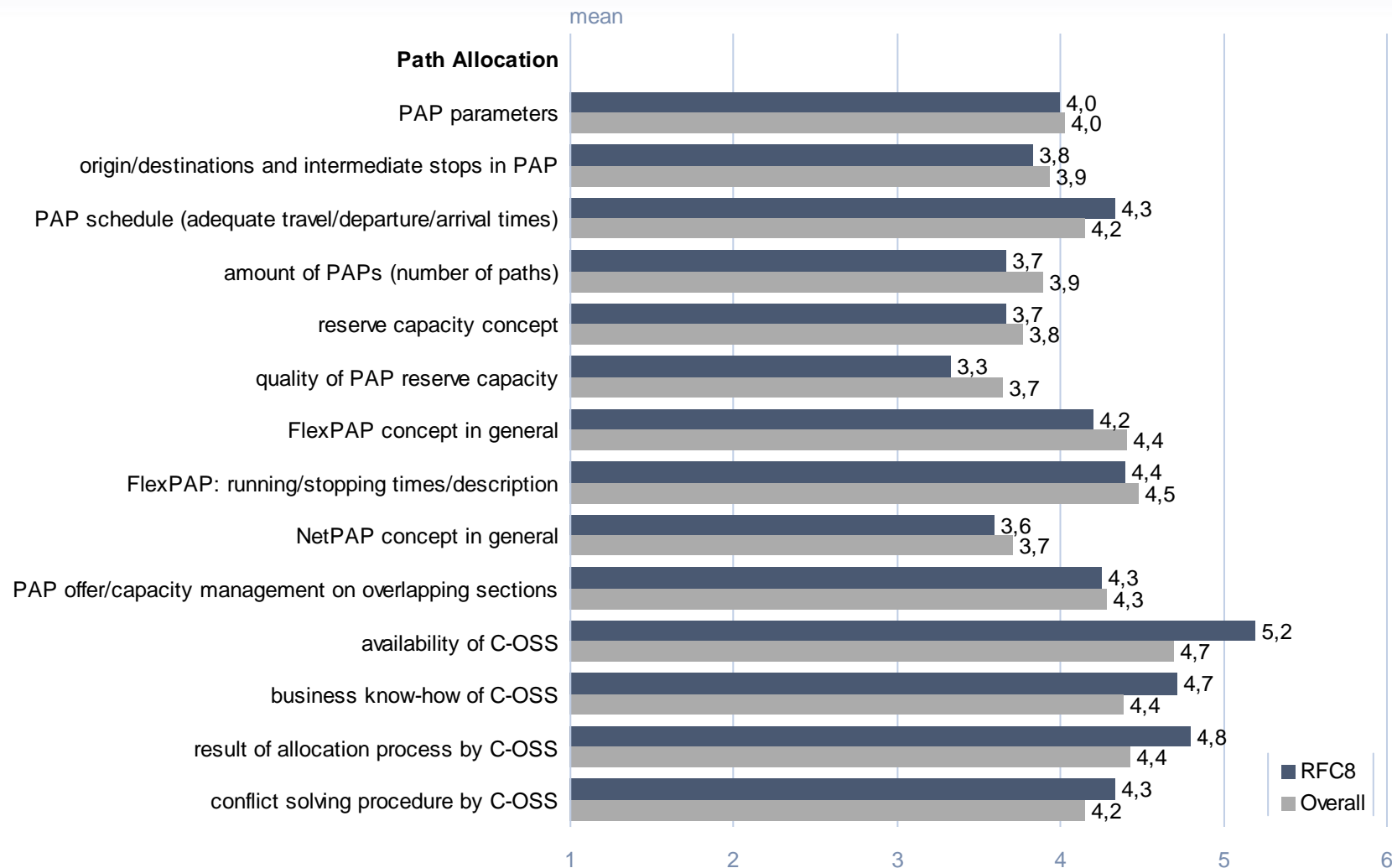


4 Summary



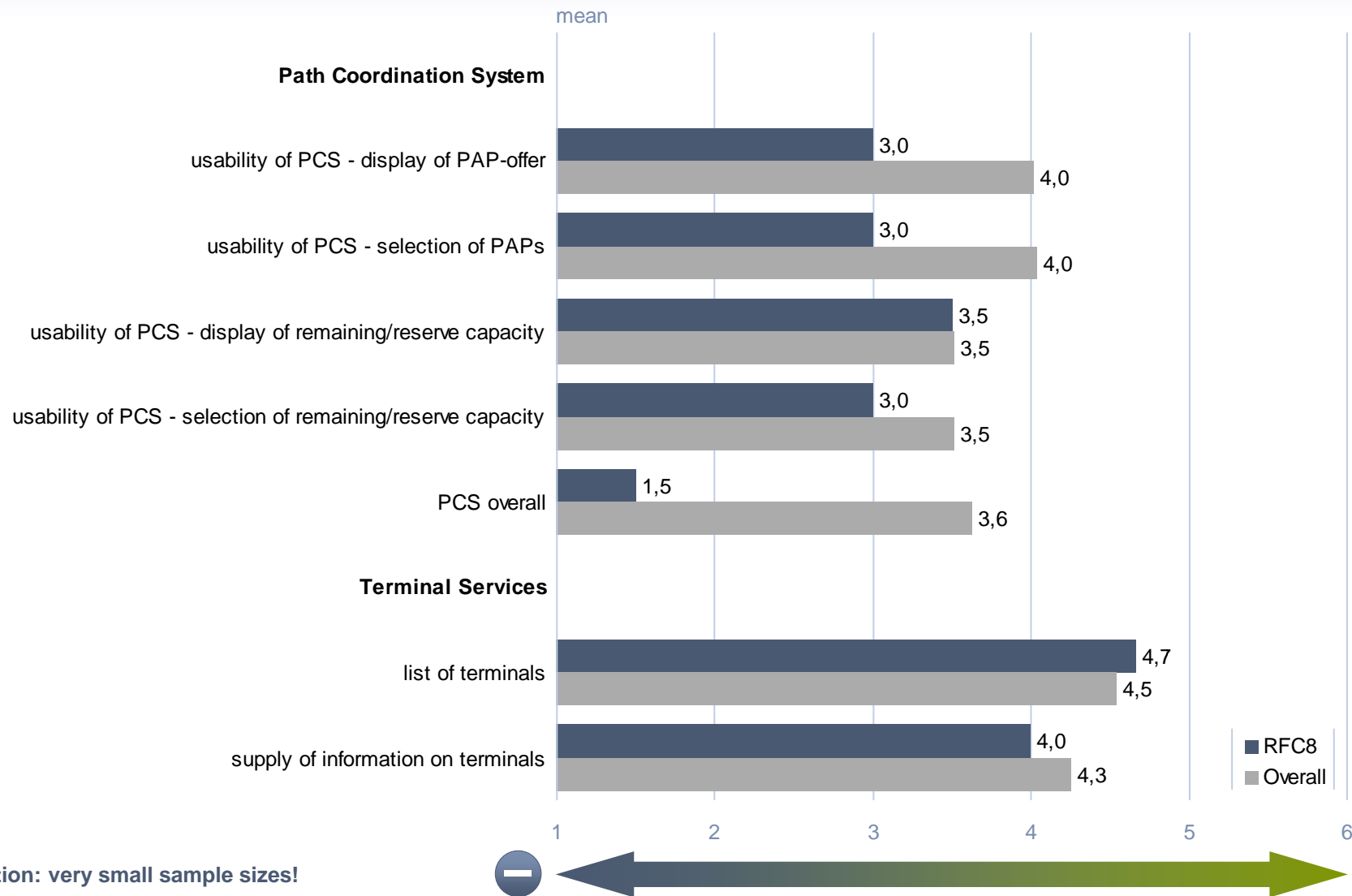


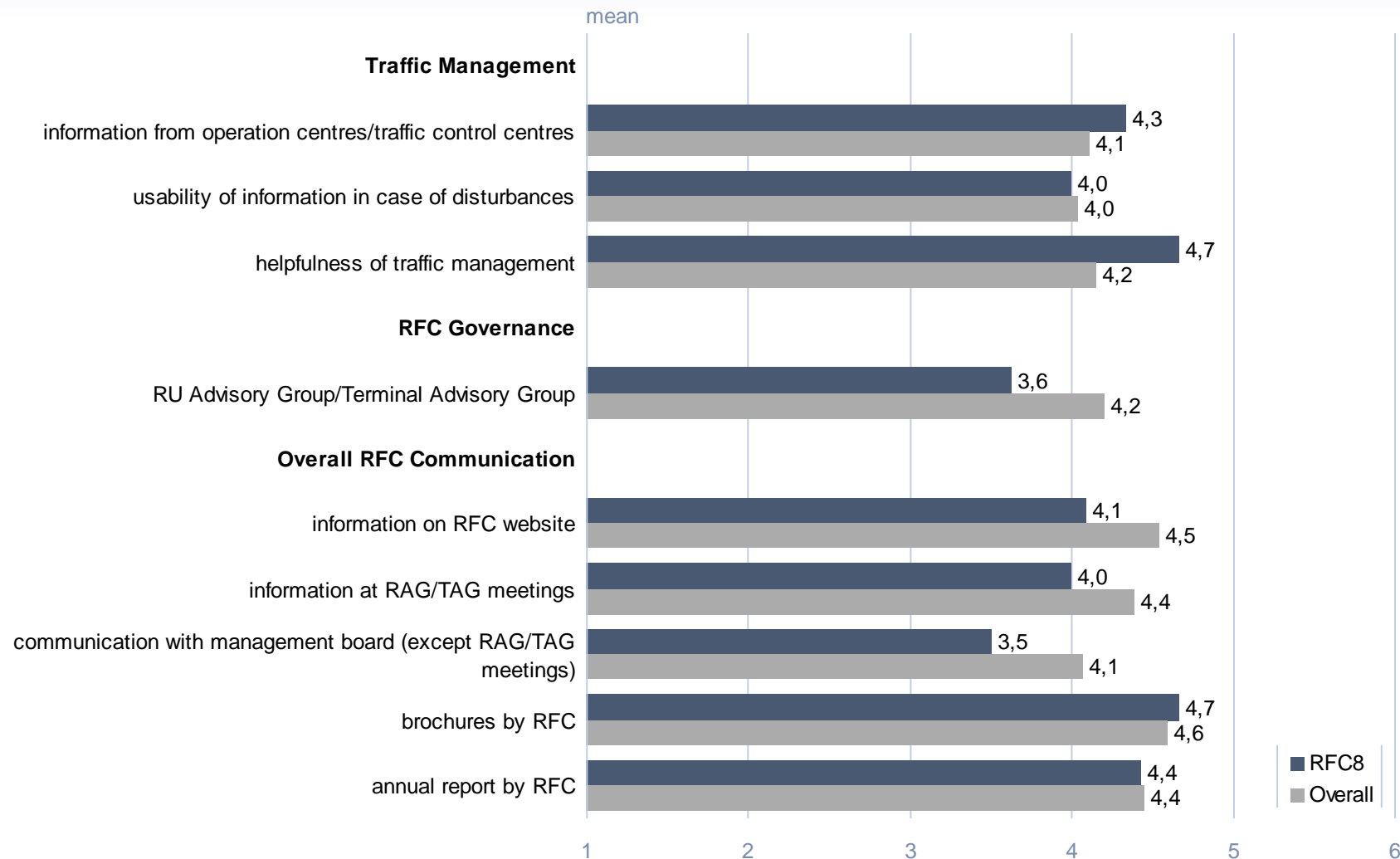




Attention: very small sample sizes!







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