



Rail Freight
Corridor 8
North Sea – Baltic



Transport Market Study on RFC North Sea-Baltic

Zuhal Nalbant
ExB Meeting RFC North Sea – Baltic

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Introduction

Article 9 of EU Regulation 913/2010

Measures for implementing the freight corridor plan

- ✓ 3. The management board shall carry out and periodically update a transport market study relating to the observed and expected changes in the traffic on the freight corridor, as a consequence of its being established, covering the different types of traffic, both regarding the transport of freight and the transport of passengers. This study shall also review, where necessary, the socio-economic costs and benefits stemming from the establishment of the freight corridor.

Annex II of EU Regulation 1316/2013

- ✓ Extending “the corridors at the latest 5 years after the date of establishment set out in this table [List of Initial Freight Corridors]...These inclusions shall be based on market studies and take into consideration the aspect of existing passenger and freight transport in line with Article 14(3) of this Regulation”:

Wilhelmshaven/Bremerhaven/Hamburg/
Amsterdam/Rotterdam/Antwerpen-
Aachen/Berlin-Warsaw-**Terespol(Poland-
Belarus border)/Kaunas-Riga-Tallinn**

Consequently: **Review & Extend** Transport Market Study for RFC North Sea-Baltic needed



Overview

- **Extension to Estonia** - based on Regulation 1316/2013
- **Extension to Latvia** - based on Regulation 1316/2013
- **Extension to Medyka** - proposal of Poland
- **Extension to Rostock & Kolin** - analysis for geographical extension
- **Update of RFC North Sea – Baltic O-D analysis**

- **Preliminary routing and corridor area**
- **Current freight** transport demand based on a reference year
- Short-term prognosis & prognosis for Rail Baltica Global Project
- **Volumes of transport** modes: rail, road, inland waterway, maritime
- Freight and passenger transport **numbers of trains, train-km, gross-ton**

Decided by General Assembly

All Extensions





Expected Results

Definition of the corridor area

- Definition of area based on geographical scope
- Identification of the most relevant rail terminals based on O/D analysis

Socio-economic development

- Political, legal, and environmental factors
- Economic factors
- Social factors
- Technological factors

Analysis of transport market

- Transport volumes per O/D trade lane and mode
- Transport volumes per market segment and mode
- Evaluation of future transport market
- Transport volumes per O/D trade pair and mode and per market segment and mode

Rail Baltica Global Project

- Summary of the CBS (after 2026 regarding new 1435mm line)
- General picture of expected traffic after project completion

Data Provision by IM/AB and Consultant

IMs/ABs (Data based on reference year 2016/17)	Consultant
Number of trains	Eurostat, national data sources (e.g. Destatis)
<p>Corridor train: one crossing on corridor border:</p> <ul style="list-style-type: none"> Two options: 1) all trains on border, 2) trains O and/or D on the corridor Challenge: changes of train numbers at the borders → experts are needed for accurate evaluation Number of trains without special trains (e.g. working trains, maintenance trains, loco) Number of trains (no differentiation between ad-hoc and timetable) 	Commodity: Eurostat, net tons
Train characteristics (length & weight/gross-tons)	Main infrastructure development projects on the Corridor
Train type (single wagon, block train, combined transport)	Socio-Economic Study (PEST) – confirmation of previous results + incl. extensions
Passenger traffic → rough picture of number of trains (only reference year)	Study Rail Baltica Global Project is available online

Principal and diversionary lines:

after the study is conducted, definition of those will be done nationally.

Evaluation & Analysis Periods

Short-term analysis
(2016/2017*-2021/2022/optional 2026)

Separate chapter
for *Rail Baltica Global Project* after 2026

*Use of data of 2017 (for the whole analysis) is preferred.; if data is not available, data of 2016 should be used

Timeline

	2017		2018				2019			
	3 rd Quarter	4 th Quarter	1 st Quarter	2 nd Quarter	3 rd Quarter	4 th Quarter	1 st Quarter	2 nd Quarter	3 rd Quarter	4 th Quarter
Terms of Reference										
Tendering & Procurement Process										
Choice of Consultant										
Preliminary Report										
Final Report										