DE – CZ – AT – SK – HU – RO – BG – EL

RFC7

Orient/East-Med

RFC User Satisfaction Survey

2019

SUMMARY

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Introduction

- Regulation (EU) No 913/2010 requires Rail Freight Corridors' (RFC) Management Board to gauge the satisfaction level of their users yearly and to publish the results of the survey.

- RNE created a common platform of Corridor Satisfaction Survey for all RFCs willing to participate, in order to make the results more comparable, to ease the answering for respondents and to ensure a modern and efficient research technique for the survey series.

- The MB of RFC OEM decided to join RNE RFC User Satisfaction Survey Common Platform in first year (2014).

Main goals and methodology of the survey

General

- The main objective of this survey is to provide detailed picture of users' opinion and experience regarding the services and products of RFCs, and to reveal motivations of potential users for the further development of rail freight corridors.
- RNE and Satisfaction Working Group of RFCs have developed a harmonised questionnaire including standard blocks covering relevant topics. An independent market research institute (marketmind) has been commissioned by RNE to carry out the fieldwork and the basic analysis.
- The research methodology is based on CAWI (Computer Assisted Web Interview - adequate for international, business target group). CAWI can diminish the language barrier, increase the response rate, it fits the target group profile and provides automated data collection and pre-cleaning (logical, irrelevant values).
- The high level of standardisation (not only in the questionnaire, but also in main directions of analysis, as well as in database and output form) aims to reach the more complete comparison among the corridors' results in the interest of a complex European view.

- 2015 – Target group narrowed on basis of relevance for better-based (more information, real experience) sample.
- 2016 – three new corridors' joining, revision of target population definition to reach the relevant segment more precisely, amendments to suit the requirements of new members.
- 2017 – The experience of earlier research waves provided us the possibility to make the questionnaire more efficient and shorter at the same time. Thus the time to be spent on filling in the questionnaire was decreased considerably becoming competitive in duration time, whereas the strata of service can be measured toned enough. Limited possibility for comparison: Due to shorter questionnaire the number of factors decreased and the composition of some areas changed, as well as a new filter being added.
- 2018 - GDPR 2016/679 EU (General Data Protection Regulation)

2019

- Open-ended questions were opened for every respondent (not only unsatisfied customers)

- New question connected to information on delays and dispatchers (RFC7's initiative)
- Those who do not have corridor capacity and do not use the corridor line either are excluded

RFC7 Open-ended answers in 2019:

Total number of open-ended answers increased from 38 to 83
(partly effect of methodology change)

The more opinions, experience the customers gave **the more information we have to develop**

Number of open-ended answers among unsatisfied customers increased from 38 to 55

They have more to tell!

- The fieldwork of the sixth wave was conducted between 12th September and 11th October, 2019.

Background of this additional analysis

- Using marketmind reports as source of basic figures this additional analysis tries to apply a different approach to reveal a more specific RFC OEM picture described by customer satisfaction.

- Currently the target population is not extended, as a consequence the sample size cannot be numerous either. Because of the small sample size we have to make the analysis very carefully.

- The results reflected real market phenomena, which validate the survey, thus it provides a good basis to reveal the main changes in RFC OEM's developmental path.

Interview statistics

	Overall	CORRIDOR RHINE-ALPINE	CORRIDOR	ScanMed RFC	ATLANTIC CORRIDOR	RFC5	MEDITERRANEAN RAIL FREIGHT CORRIDOR	RFC7 Orient/East-Med	Rail Freight Corridor North Sea – Baltic
Total interviews	**67** (-1)	**19** (+/-0)	**15** (-4)	**14** (+4)	**10** (+/-0)	**14** (+2)	**21** (+/-0)	**20** (+1)	**12** (-3)
Full interviews	64 (-1)	18 (+1)	14 (-3)	14 (+5)	10 (+/-0)	14 (+3)	21 (+/-0)	18 (+/-0)	11 (-2)
Partial interviews	3 (+/-0)	1 (-1)	1 (-1)	0 (-1)	0 (+/-0)	0 (-1)	0 (+/-0)	2 (+1)	1 (-1)

RFC OEM number of interviews increased, however slightly less corridor users answered*.

Our sample is supposed to be in change: Germany's affiliation expanded the target population significantly with more diverse composition. RFC OEM became relevant for a larger number of different companies at the same time.

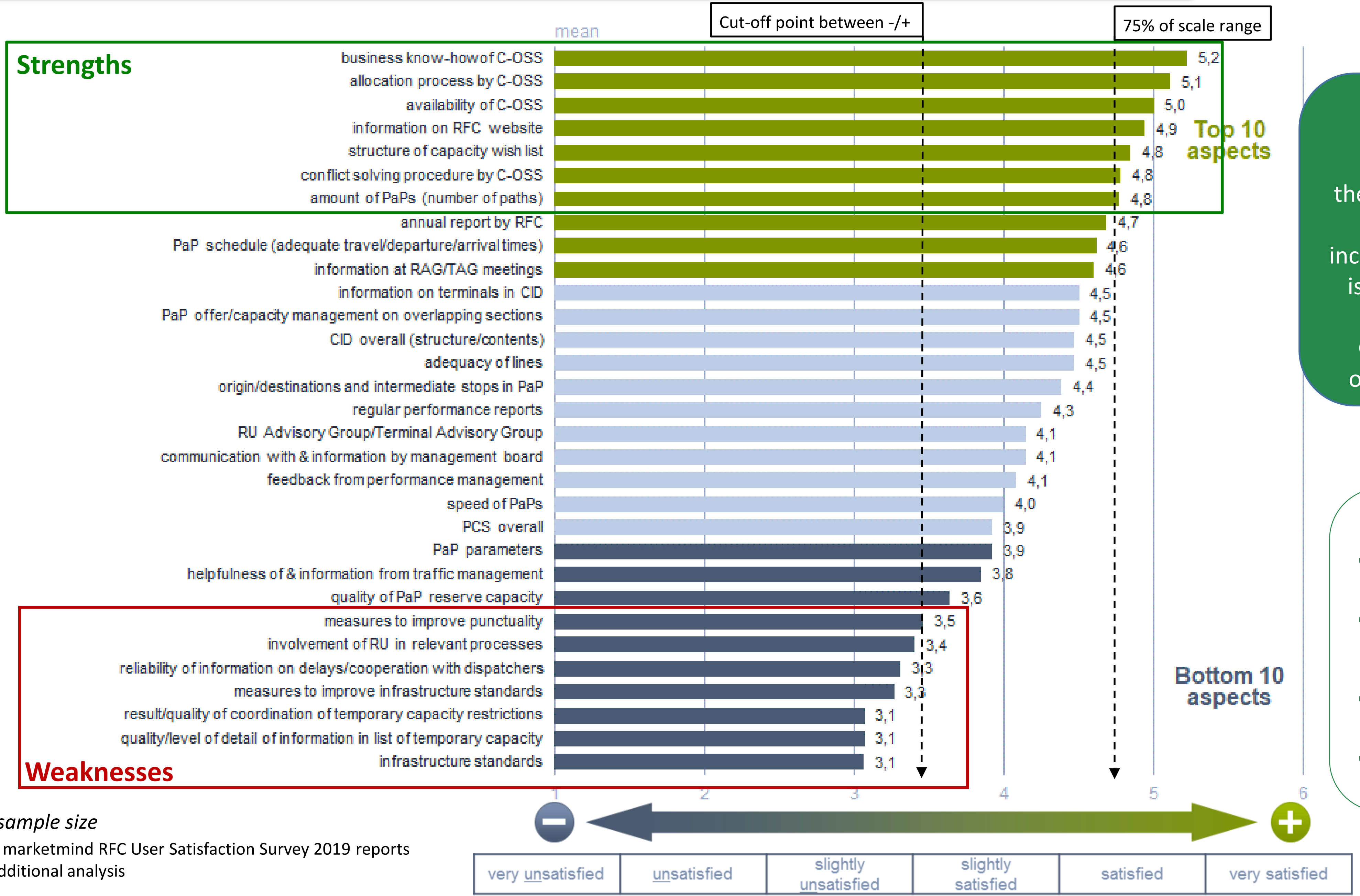
2019 (change from 2018)

Respondents having evaluated more than one RFC are counted multiple times: 67 Total interviews ⇨ 128 evaluations

Source: marketmind RFC User Satisfaction Survey 2019 reports / RFC 7 additional analysis

*Number of respondents who are involved in ordering capacity via C-OSS=10 (in 2018: 11)
Total real number of corridor users in 2019=28 (in 2018: 17)
(Because of Germany's affiliation not comparable with 2018, and therefore the response rate among corridor users are not countable either, it would be a misleading ratio)

2019 - Summary - Satisfaction Rating



RFC OEM has more highlighted strengths (2018: 3), but the number of highlighted weaknesses also increased (from 1 to 7) and is equal with strengths'.

C-OSS performance is outstanding constantly.

Different interpretation (instead of top/bottom 10):

- Scale quartering in which the items in top quarter (above 75% of the scale) are the highlighted strengths
- Middle of the scale (3,5): substantial, turning point between dissatisfied and satisfied areas

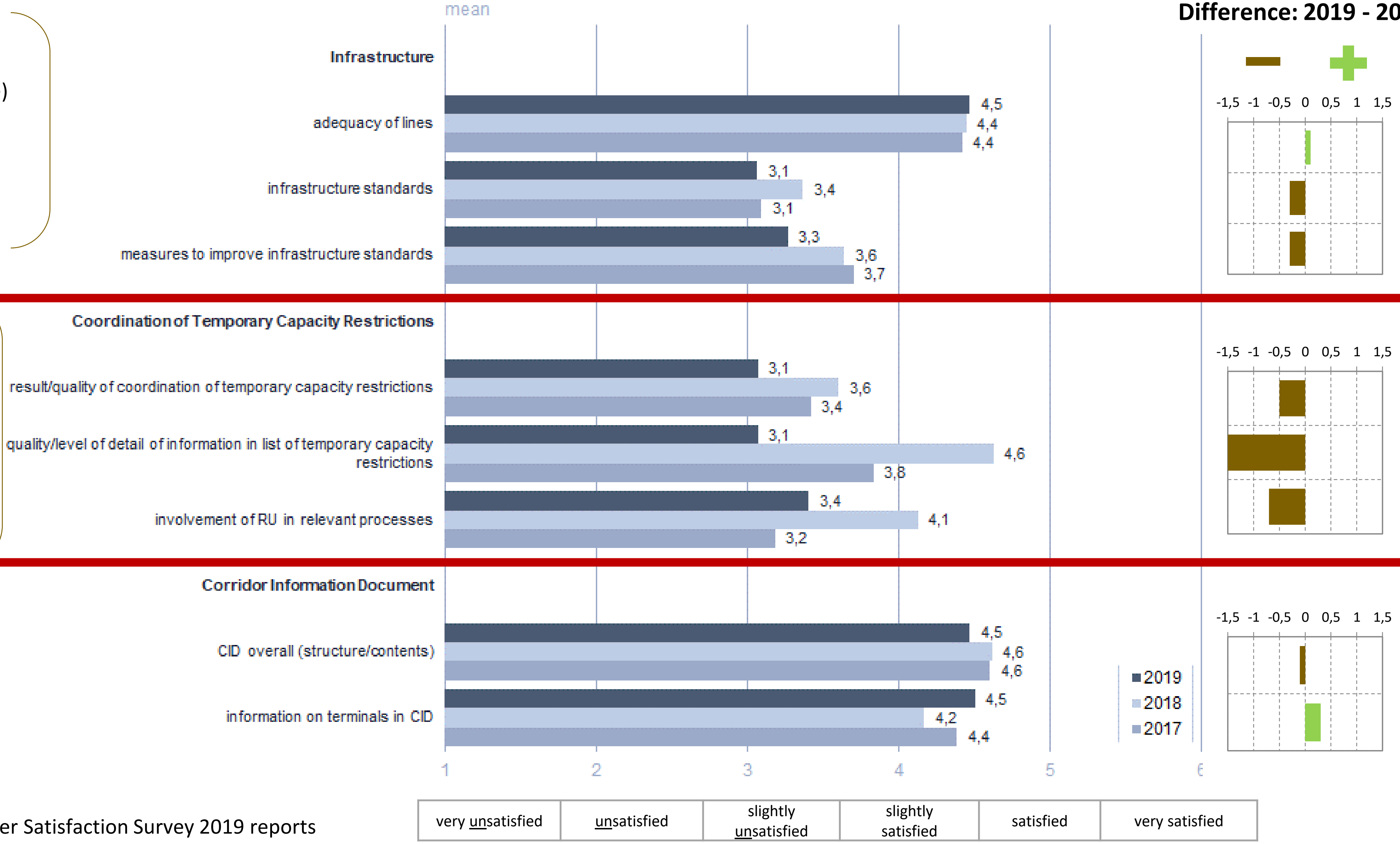
- TB10 implies that we have 10 weaknesses ever – no development possibility
- TB10 implies that the number of our strengths and weaknesses are the same – it is not necessary

Small sample size

Source: marketmind RFC User Satisfaction Survey 2019 reports
RFC 7 additional analysis

Summary - Satisfaction Rating - Comparison to 2018 (1)

Main reasons:
- Parameters (train, infrastructure, time)
- Capacity at Curtici-Lőkösháza
- Condition in Romania/Bulgaria

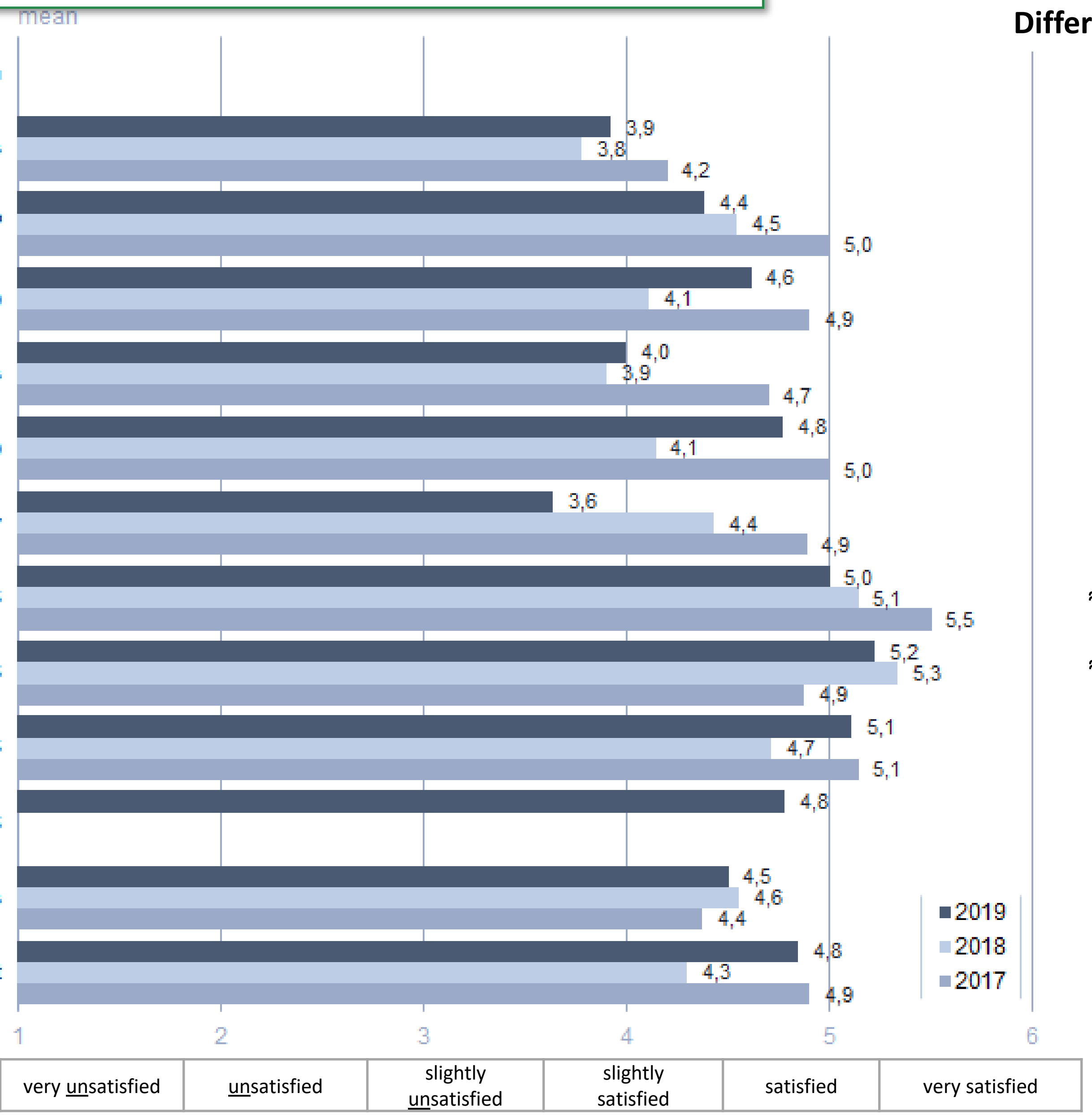


Main reasons:
- Deficiency of coordination, harmonisation
- Consideration of RFC trains
- TCR (planning; late or missing information)

Small sample sizes

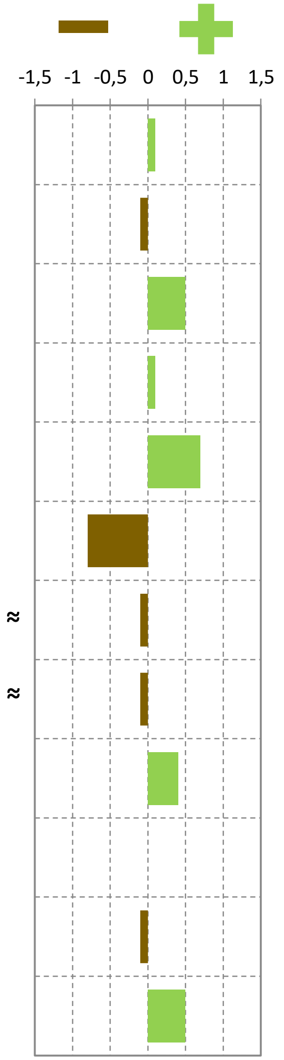
Source: marketmind RFC User Satisfaction Survey 2019 reports
RFC 7 additional analysis

Summary - Satisfaction Rating - Comparison to 2018 (2)



≈ Limited possibility to comparison: 2017 and 2018 filter question (Did you order capacity via the C-OSS? - Yes)
Last comparable year 2016: 4,8; 4,8; (4,6)

Difference: 2019 - 2018



Small sample sizes

Source: marketmind RFC User Satisfaction Survey 2019 reports
RFC 7 additional analysis

Summary - Satisfaction Rating - Comparison to 2018 (3)

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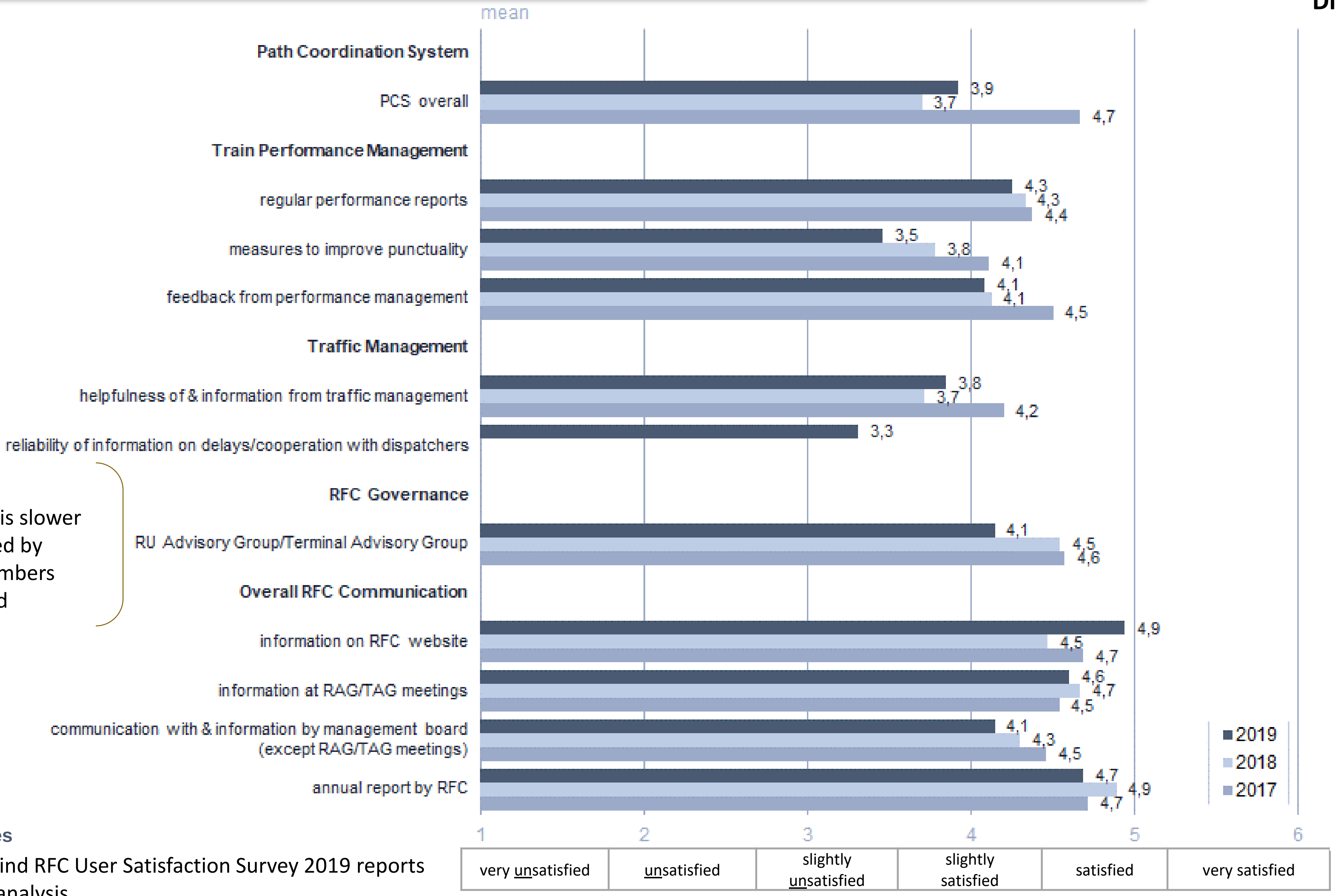

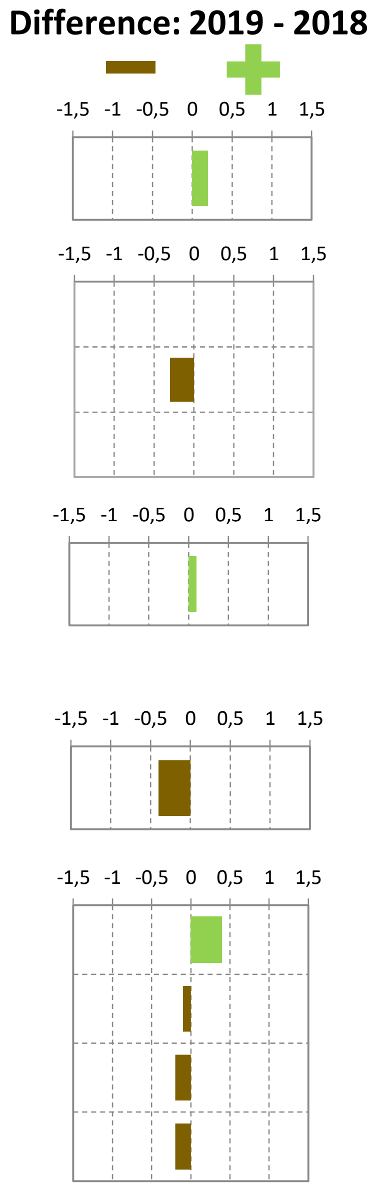

Main reason:
- The progress is slower in issues raised by TAG/RAG members than expected

Small sample sizes

Source: marketmind RFC User Satisfaction Survey 2019 reports
RFC 7 additional analysis

Main findings - Orient/East-Med 2019

- **C-OSS** is acknowledged as one of the RFC OEM’s key activities
- Communication is good, but information by MB shall be improved
- More tangible developments are needed in TM and TPM – it should be the „engine” of the corridor
- Coordination of TCR needs urgent intervention – strong signal from the market
- Important to keep customers’ commitment and the positive balance between our strengths and weaknesses
- The customers demand perceptible progress in priority, quality standards, harmonisation, coordination

Thank you for your attention!

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Any remarks, feedbacks, suggestions are very welcomed!