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RFC7

Orient/East-Med



**RAIL
FREIGHT
CORRIDOR
Rhine-Danube**

Updating the Transport Market Studies

Advisory Groups

Joint meeting of Rail Freight Corridors
Orient / East-Med and Rhine–Danube

30 March 2023

Approach

- Joint project of all RFCs:
 - individual updates based on a **common basis**
- Baseline:
 - a **feasibility study** approved by the RNE General Assembly (GA) in December 2022 and
 - commonly agreed **Guidelines** to be submitted for approval to the RNE GA in May 2023.
- Stakeholders involved:
 - Railway Undertakings
 - Freight Forwarders
 - Infrastructure Managers
 - Ministries of transport
 - Intermodal Operators
 - Logistics Service Providers
 - Shippers
 - Terminal Operators
 - End Customers and Industry players

Scope

Analysis of the current RFC transport market

- Freight transport demand along the RFCs and in their catchment area
- Market share of rail
- Factors affecting the competitiveness of rail
- Impact of establishing the RFCs

Forecast of the future RFC transport market

- Expected change to demand
- Potential future demand for rail on the RFCs
- Potential modal shift from road to rail on the RFCs
- Factors affecting the future demand

Recommendations

- How the RFCs should develop to attract the potential future demand?

Not equivalent to a full European Transport Market Study!

Benefits for and consultation with stakeholders

➤ Benefits:

- **more efficient use of resources** of all participating stakeholders
- **comparable** Transport Market Studies over all RFCs

➤ Consultation:

- Initial phase: data and information collection

The quality and the usefulness of the results of the study will be affected by the **quantity and quality of information received**. For instance, reliable information on rail transport in terms of O/D pairs would greatly help to estimate a realistic O/D matrix.

- Final stage: sharing the results of the study – to be done jointly for RFCs OEM and RD
- Finally: integration of the essential elements of the study into the Implementation Plans, subject to approval by the Executive Boards

Timeline

