RAIL FREIGHT CORRIDOR Rhine-Danube

Rail Freight Corridor Rhine-Danube

Corridor Information Document

Implementation Plan

17-07-2025

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1 Introduction

In 2010 the European Parliament and the Council adopted Regulation (EU) No. 913/2010 concerning a European rail network for competitive freight, which entered into force on 9th November 2010 (hereinafter referred to as RFC Regulation), providing for the establishment of international Rail Freight Corridors (hereinafter referred to as Corridors). The purpose of creating Corridors is to increase the competitiveness of international rail freight transport by making it more attractive and efficient. In Annex I to the RFC Regulation, nine initial Corridors were defined.

Annex II of Regulation (EU) No. 1316/2013 of the European Parliament and of the Council concerning the establishment of the Connecting Europe Facility replaced the above-mentioned Annex of the RFC Regulation. In line with the amended list of Corridors, Rail Freight Corridor Rhine-Danube (hereinafter referred to as the Corridor) was established and became operational on 10 November 2020.

The aim of the Corridor is to provide a reliable, sustainable, green and customer-oriented services and solutions, including a seamless crossing of national borders. Cooperation among eight Infrastructure Managers and one Allocation Body is realised by harmonising capacity allocation, coordinating temporary capacity restrictions, traffic management, and train performance management along the Corridor.

The principal guidelines specified by the RFC Regulation focus on:

- establishing a single point of contact for designated capacity allocation on each Corridor;
- closer cooperation and harmonisation between Infrastructure Managers/Allocation Bodies and Member States both for the operational management of the infrastructures and for investments, in particular by putting a governance structure for each Corridor in place;
- increased coordination between the rail network and terminals (maritime and inland ports and marshalling yards);
- stable and reliable provision of the necessary infrastructure capacity allocated to international rail freight.

On 18 July 2024, the revised European Regulation about the development of the trans-European transport network[1] entered into force (hereinafter referred to as revised TEN-T Regulation). This Regulation integrates the 11 RFCs and the formerly known nine Core Network Corridors (CNCs) into nine so-called European Transport Corridors (ETCs).

From the above date on, the member states and the rail infrastructure managers concerned have 18 months to make the necessary geographical alignments to the current Corridors, as well as the alignments to the governance and the organisation. As a first step, a substantial part of the current RFC Orient / East – Med, including among others many lines currently overlapping with the Corridor, was integrated into this Corridor on 1 April 2025.

As for the further steps, the Corridor, in line with the Regulation, needs to be extended from Budapest to Serbia and a line from Romania to Serbia shall be integrated into this Corridor in Romania as well. Additionally, the revised TEN-T Regulation has implicated certain amendments to the RFC Regulation.

The purpose of this update of the Implementation Plan, which is part of the Corridor Information Document (hereinafter referred to as CID), is:

[1] Regulation (EU) 2024/1679 of the European Parliament and the Council of 13 June 2024 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

- to align it with the amendments to Art. 9 of the RFC Regulation listing the required elements of the implementation plan,
- to incorporate new lines to the Corridor in Hungary and Romania in order to continue aligning the routing with ETC Rhine-Danube according to the revised TEN-T Regulation.

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The update of this document was consulted with the Advisory Groups in May/June 2025. The update of this document was approved by the Executive Board (a requirement of Article 9 of the Regulation), comprising the representatives of the ministries in charge of transport, in June 2025.

At the time of elaboration of this update the exact date of integration of Serbian railway infrastructure manager Infrastruktura železnice Srbije was not known. For this reason, a further update of this document is envisaged, when appropriate.

2 Corridor Description

2.1 Key Parameters of Corridor Lines

RFC Rhine-Danube forms the rail freight backbone of the ETC Rhine-Danube. It traverses Romania, Hungary, Austria, Slovakia, the Czech Republic, Germany and France. This extensive network comprises routes for efficient freight traffic between industrial centers and terminals in Central and Central-Eastern Europe and connects to maritime transport in the Romanian seaport of Constanta at the Black Sea and the German seaports of Hamburg, Bremen, Bremerhaven and Wilhelmshaven at the North Sea and Rostock at the Baltic Sea. The corridor also connects the EU eastern border at Čierna nad Tisou in Slovakia and will provide a link to Ukraine and Serbia, further enhancing rail connectivity between East and West and facilitating rail freight from and to South-Eastern Europe and Asia.

The lines of the corridor, are listed in the table on the following pages.

As a result of the inclusion of major parts of RFC Orient/East-Med into RFC Rhine-Danube from 1 April 2025, the lines concerned have been integrated into the below table and are **highlighted** in bold style.

The Corridor will be further extended in the near future. It will incorporate the main railway line between Budapest and Kelebia in Hungary and between Timisoara and Stamora Moravita in Romania. These new lines to RFC Rhine-Danube are included in the table below and are written ***in italics***.

The key parameters of the Corridor lines are displayed on an interactive map in the the Customer Information Platform: https://cip.rne.eu.

Country	Line section	Length of the line section
Austria	Salzburg-Steindorf bei Straßwalchen-Vöcklabruck-Wels	101 km
	Passau-Grieskirchen-Wels	81 km
	Wels-Linz-Enns-Amstetten-St. Pölten-Wien-Bruck a. d. Leitha-Parndorf-Kittsee	282 km
	Parndorf-Nickelsdorf-Hegyeshalom	24 km
	Wien-Ebenfurth-Baumgarten	54 km
	Břeclav/Hohenau (CZ/AT)	**13 km**
	Hohenau – Gänserndorf	**34 km**
	Gänserndorf - Wien Zvbf	**37 km**
	Marchtrenk-Traun-Linz	21 km
	Wien Zvbf – Wien Freudenau	**9 km**
	Tullnerfeld - Krems Terminal	46 km
Czech Republic	Schirnding/Cheb – Cheb (DE/CZ)	11 km
	Cheb-Plzeň	106 km
	Furth im Wald/Česká Kubice – Domažlice	16 km
	Domažlice-Plzeň	57 km
	Plzeň-Beroun-Praha-Poříčany	144 km
	Praha-Malešice – Praha-Libeň – Praha-Běchovice	11 km

	Poříčany-Kolín-Pardubice	65 km
	Pardubice-Choceň-Česká Třebová	60 km
	Česká Třebová-Olomouc-Přerov-Hranice na Moravě	136 km
	Hranice na Moravě-Horní Lideč/Lúky pod Makytou	70 km
	Hranice na Moravě-Ostrava-Dětmarovice-Český Těšín-Mosty u Jablunkova-Čadca	126 km
	Česká Třebová – Svitavy – Brno	**94 km**
	Brno – Břeclav	**60 km**
	Břeclav/Hohenau (CZ/AT)	**5 km**
	Břeclav/Kúty (CZ/SK)	**11 km**
	Bad Schandau/Děčín (DE/CZ) – Kralupy n.V. – Praha	**144 km**
	Děčín – Nymburk – Kolín	**166 km**
	Kolín – Kutná Hora – Havlíčkův Brod	**73 km**
	Havlíčkův Brod – Křižanov	**57 km**
	Křižanov – Brno	**60 km**
	Praha-Lysá nad Labem- Nymburk-Velký Osek-Kolín	72 km
	Velký Osek-Hradec Králové-Choceň	96 km
France	Strasbourg-Kehl	20 km
Germany	**Bremerhaven – Bremen**	**69 km**
	Wilhelmshaven – Bremen	**105 km**
	Bremen – Wunstorf	**100 km**
	Wunstorf – Magdeburg	**166 km**
	Lehrte – Wolfsburg	**50 km**
	Wolfsburg – Weddel	**20 km**
	Hamburg – Stelle	**40 km**
	Stelle – Uelzen	**64 km**
	Uelzen – Veerßen	**2 km**
	Veerßen – Stendal	**105 km**
	Stendal – Magdeburg	**59 km**
	Magdeburg – Roßlau	**56 km**
	Roßlau – Falkenberg	**80 km**
	Falkenberg – Dresden	**76 km**
	Rostock – Neustrelitz	**121 km**
	Neustrelitz – Berlin	**119 km**
	Berlin – Elsterwerda	**123 km**
	Elsterwerda – Dresden	**56 km**
	Dresden – Bad Schandau	**40 km**
	Bad Schandau – Děčín (DE/CZ)	**11 km**
	Kehl-Appenweier-Rastatt Süd (via 4000)	50 km
	Rastatt Süd-Rastatt-Durmersheim (via 4020)-Karlsruhe	40 km
	Karlsruhe-Hockenheim-Mannheim-Darmstadt-Aschaffenburg	140 km
	Aschaffenburg-Gemünden-Waigolshausen-Bamberg-Nürnberg	220 km
	Nürnberg-Regensburg-München	238 km
	Regensburg-Passau	117 km
	Karlsruhe-Pforzheim-Mühlacker	40 km
	Mühlacker-Ludwigsburg-Stuttgart-Ulm-Augsburg-München	287 km
	München-Rosenheim-Freilassing-Salzburg	148 km
	Nürnberg-Marktredwitz-Schirnding-Cheb	140 km
	Regensburg-Schwandorf-Furth im Wald-Domažlice	74 km
	Appenweier-Rastatt Süd (via 4280)	40 km

	Rastatt-Ettlingen West (via 4000)-Karlsruhe-Bruchsal-Heidelberg-Mannheim	93 km
	Darmstadt-Frankfurt am Main, Mannheim-Groß Gerau-Frankfurt am Main-Hanau-Aschaffenburg	27 km, 98 km
	Gemünden-Würzburg-Nürnberg	132 km
	Bruchsal-Mühlacker	32 km
	München-Mühldorf am Inn-Freilassing	140 km
Hungary	Baumgarten-Sopron-Győr	93 km
	Rajka-Hegyeshalom	13 km
	Hegyeshalom-Győr-Tata-Budapest-Újszász-Szolnok	285 km
	Ferencváros - Kelebia	***161 km***
	Szolnok-Szajol-Békéscsaba-Lőkösháza-Curtici	136 km
	Komárno/Komárom (SK/HU)	**4 km**
	Szob – Rákospalota-Újpest	**55 km**
	Rákospalota-Újpest – Angyalföld elágazás	**3 km**
	Angyalföld elágazás – Rákos elágazás	**6 km**
	Vác – Vácrátót	**9 km**
	Vácrátót – Galgamácsa	**15 km**
	Galgamácsa – Aszód	**9 km**
	Aszód – Hatvan	**18 km**
	Hatvan – Újszász	**52 km**
	Budapest-Cegléd-Szolnok	88 km
	Szajol-Püspökladány-Biharkeresztes-Episcopia Bihor	130 km
Romania	Lőkösháza/Curtici (HU/RO)	11 km
	Curtici – Arad	17 km
	Arad – Timisoara	57 km
	Timisoara – Orsova	187 km
	Orsova – Filiaşi	102 km
	Filiasi – Craiova	36 km
	Arad – Simeria	157 km
	Simeria – Coslariu	69 km
	Coslariu – Sighisoara	98 km
	Sighisoara – Brasov	129 km
	Brasov – Predeal	26 km
	Predeal – Brazi	92 km
	Brazi - Chitila (Bucuresti)	52 km
	Chitila (Bucuresti) – Fetesti	147 km
	Timișoara Nord - Stamora Moravița	***58 km***
	Fetesti – Constanta	78 km
	Biharkeresztes - Oradea Est (HU/RO)	22 km
	Oradea Est - Cluj Napoca Est	155 km
	Cluj Napoca Est – Coslariu	99 km
	Craiova – Videle	158 km
	Videle - Chitila (Bucuresti)	50 km
	Simeria – Filiasi	202 km
	Ploiești Triaj – Buzău – Făurei – Fetești	204 km
Slovakia	Čadca-Žilina	30 km
	Lúky pod Makytou-Púchov-Žilina	64 km
	Žilina-Vrútky-Liptovský Mikuláš-Poprad-Spišská Nová Ves-Kysak-Košice	243 km
	Barca-Výh. Slivník (Výh. 8)	33 km
	Výh. Slivník (Výh. 8)-Čierna nad Tisou	57 km

	Barca-Košice (via Košice predmestie)	4 km
	Kittsee-Bratislava Petržalka-Rusovce-Rajka	17 km
	Břeclav/Kúty (CZ/SK)	**18 km**
	Kúty – Devinska N.Ves	**51 km**
	Devínska N.Ves – Bratislava hl.st.	**13 km**
	Bratislava hl.st. – Rusovce	**28 km**
	Bratislava hl.st.– Nové Zámky	**91 km**
	Nové Zámky – Komárno	**29 km**
	Komárno/Komárom (SK/HU)	**5 km**
	Nové Zámky – Štúrovo	**44 km**
	Trnava – Trenčín	**77 km**
	Trenčín – Púchov	34 km
	Štúrovo/Szob (SK/HU)	14 km
	Kúty – Trnava	**69 km**
	Trnava – Galanta	**27 km**
	Bratislava hl.st. –Dunajská Streda	**47 km**
	Dunajská Streda – Komarno št.hr.	**53 km**
	Čierna nad Tisou-UA border (Chop)	4 km

Table 1: Line sections of RFC Rhine-Danube

The updated map of the corridor is displayed on the next page. Most of the solid black lines demonstrate the initial lines of the Corridor. Some of the lines were taken over from RFC OEM into the Corridor on 1 April 2025, on which lines the C-OSS of RFC RD has already offered Reserve Capacity for timetable 2025 in October 2024 and offered PaPs for timetable 2026 for the first time.

New lines between Trvana and Púchov, as well as between Budapest and Kelebia, Timisoara and the border with Serbia are expected to be integrated in the future.

Since at the time of elaboration of this update the exact date of integration of Serbian railway infrastructure manager Infrastruktura železnice Srbije was not known a further update of this document is envisaged and these lines are shown as dotted.

It also needs to be noted that the ETC Rhine-Danube includes a line from the Slovak border to Lviv in Ukraine in addition to the lines covered by this Implementation Plan. However, this particular line in Ukraine will not become part of RFC Rhine-Danube due to Ukraine neither being a member state of the EU, nor having signed the Transport Community Treaty with the EU yet. Therefore, there is currently no legal basis for Ukraine to join the governance and the activities of the RFCs.

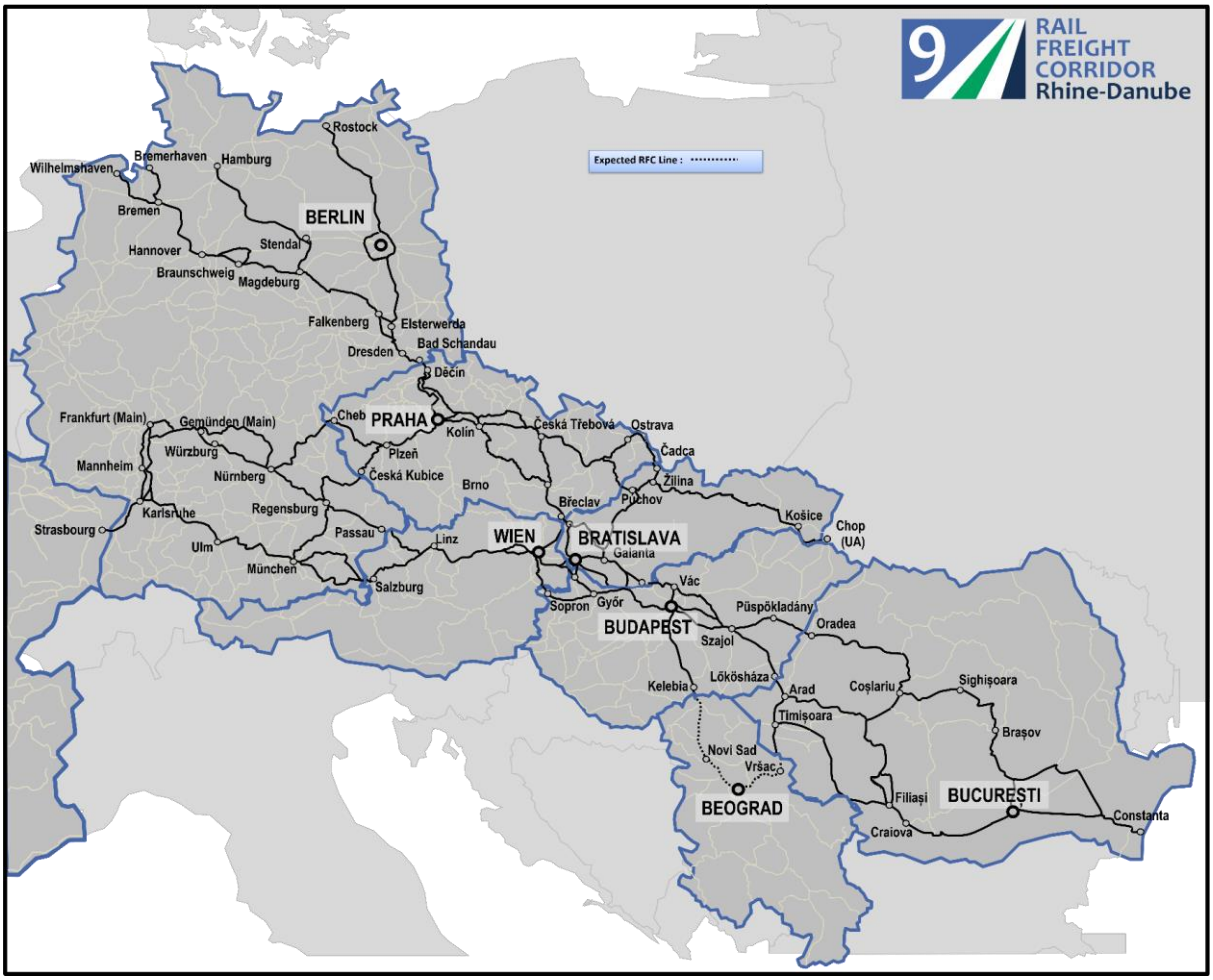


Figure 1: Map of RFC Rhine-Danube

2.2 Corridor Terminals

All terminals and marshalling yards along the corridor lines have been determined as part of the Corridor as well, except if a terminal does not have any relevance for rail freight traffic on the Corridor. The terminals and marshalling yards are listed in the table on the following pages.

As a result of the inclusion of major parts of RFC Orient/East-Med into RFC Rhine-Danube from 1 April 2025, the terminals and marshalling yards concerned have been integrated into the below tables and are highlighted in **bold style**.

Terminals are also displayed on an interactive map in the CIP accessible via https://cip.rne.eu.

The list of terminals may not be aligned with the identification of the multimodal freight terminals according to the revised TEN-T regulation (EU 1679/2024).

Country	Type of terminal	Terminal / Marshalling yard	City of the terminal or marshalling yard
Austria	Terminals	Wels Vbf CCT/ROLA, ÖBB Infrastruktur AG	Wels
		LINZ AG für Energie, Telekommunikation, Verkehr und Kommunale Dienste	Linz
		Wien Freudenau Hafen	Vienna
		Container Terminal Enns GmbH	Mauthausen
		METRANS Terminal Krems an der Donau	Krems an der Donau
		CTS Container Terminal Salzburg GmbH	Salzburg
		Wiencont Container Terminal GmbH	Vienna
		Terminal Wien Inzersdorf -Süd, ÖBB Infrastruktur AG	Vienna
	Marshalling yard	Wien Zentralverschiebebahnhof	Vienna
Czech Republic	Terminals	Terminal Ostrava-Paskov	Vratimov
		Metrans-Terminal Ostrava - Šenov	Havířov
		Terminal Ostrava-Mošnov	Ostrava
		Contargo-Terminal Plzeň	Plzeň
		Metrans-Terminal Plzeň – Nýřany	Plzeň-Nýřany
		Metrans-Terminal Praha- Uhříněves	Praha-Uhříněves
		Terminal Pardubice	Pardubice
		Rail Hub Terminal Česká Třebová	Česká Třebová
		RCO-CSKD Terminal Přerov	Přerov
		Metrans-Terminal Zlín - Želechovice/Lípa nad Dřevnicí	Lípa nad Dřevnicí
		Terminal Agro Bohemia Kopřivnice	Kopřivnice
		Port Mělník	Mělník
		DUSS Terminal Lovosice	Lovosice
		Terminál Brno Horní Heršpice	**Brno**
		Trimodal Terminal Port Děčín - Loubí	**Děčín**
		Trimodal Terminal Ústí nad Labem	**Ústí nad Labem**
	Marshalling yards	Cheb seř. obvod 2	Cheb
		Plzeň seř. n.	Plzeň
		Beroun seř. n.	Beroun
		Praha-Libeň	Praha
		Kolín seř. nádraží	Kolín
		Pardubice	Pardubice
		Česká Třebová směr. sk.	Česká Třebová
		Olomouc pravé předn.	Olomouc
		Přerov předn.	Přerov
		Valašské Meziříčí	Valašské Meziříčí
		Ostrava-Kunčice	Ostrava
		Bohumín-Vrbice	Bohumín

		Ostrava pravé n.	Ostrava
		Ostrava levé n.	Ostrava
		Děčín hl.n.	**Děčín**
		Kralupy nad Vltavou	**Kralupy nad Vltavou**
		Brno Maloměřice	**Brno**
		Břeclav přednádraží	**Břeclav**
		Havlíčkův Brod	**Havlíčkův Brod**
France	Terminals	Port Autonome de Strasbourg	Strasbourg
		Hausbergen marshalling yard	Strasbourg
Germany	Terminals	Contargo Karlsruhe Rheinhafen	Karlsruhe
		Klumpp + Müller GmbH & Co. KG	Kehl
		ETK Euro Terminal Kehl GmbH	Kehl
		DUSS-Terminal Karlsruhe by DB	Karlsruhe
		Fruchtcargo Container-Depot Wörth	Karlsruhe
		Container Yard Speyer Contargo	Karlsruhe
		Contargo Wörth	Karlsruhe
		DP World Germersheim	Mannheim
		DUSS-Terminal Mannheim-Handelshafen	Mannheim
		RoRo-Terminal Mannheim	Mannheim
		Kobler Container Depot	Mannheim
		Contargo Rhein-Neckar Mannheim	Mannheim
		Kombi-Terminal Ludwigshafen KTL	Ludwigshafen
		Mannheimer Tankwagenreinigung Container Depot	Mannheim
		Cotac Depot Mannheim	Mannheim
		Terminal Worms, Rhenania Worms AG	Mannheim
		Hempt Container-Depot Worms	Mannheim
		GUT Gernsheimer Umschlags-und Terminalbetriebsgesellschaft GmbH & Co. KG	Gernsheim
		DUSS-Terminal Frankfurt/Main-Ost	Frankfurt am Main
		Trimodal Container terminal Aschaffenburg -TCA	Frankfurt am Main
		Contargo Rhein-Main GmbH, Contargo Frankfurt-Ost	Frankfurt am Main
		Contargo Industriepark Frankfurt - Höchst GmbH	Frankfurt am Main
		Frankenbach Container Terminals GmbH	Mainz
		TriCon Container Terminal Nürnberg	Nürnberg
		DB Cargo AG Multimodal Logistics Center	Nürnberg
		CDN Container Depot Nürnberg GmbH	Nürnberg
		DUSS-Terminal Stuttgart Hafen	Stuttgart
		SCT Stuttgarter Container Terminal GmbH	Stuttgart
		DUSS-Terminal Kornwestheim	Kornwestweim (Stuttgart region)
		DUSS-Terminal Augsburg-Oberhausen	Augsburg
		Container Terminal Regensburg (CTR)	Regensburg
		DUSS-Terminal Regensburg-Ost	Regensburg

Cargo Center Bayern –Wiesau	Wiesau
baymodal Bamberg GmbH	Bamberg
Kloiber Container Depot Augsburg	Augsburg
DUSS-Terminal Ulm	Ulm
CDM Container Depot München GmbH & Co. Service KG	München
DUSS-Terminal München-Riem	München
TRANSLOG Transport + Logistik GmbH	Schweinfurt
DUSS-Terminal Landshut	Landshut
Parsdorfer Tankwagenreinigung Container Depot	München
Bremerhaven RTB, Bremerhaven NTB, Bremerhaven CTB, Bremerhaven MSC Gate	**Bremerhaven**
Wilhelmshaven Eurogate, Rail Terminal Wilhelmshaven GmbH	**Wilhelmshaven**
NORDFROST Seehafen-Terminal	**Wilhelmshaven**
Brake J.MÜLLER BBT	**Brake**
Bremen Roland	**Bremen**
Hannover Nordhafen	**Hannover**
Rhenus AG	**Holzwickede**
Hannover-Leinetor	**Hannover**
DUSS-Terminal Hannover-Linden	**Hannover**
Megahub Lehrte	**Lehrte**
Railport Braunschweig	**Braunschweig**
Braunschweig Hafen	**Braunschweig**
Wolfsburg GVZ	**Wolfsburg**
Salzgitter GVZ – KLV Terminal	**Salzgitter**
Magdeburg Hanse-Terminal	**Magdeburg**
Roßlau container terminal	**Dessau-Roßlau**
Riesa Hafen	**Riesa**
Railport Hamburg 1	**Hamburg**
Container Terminal Tollerort (CTT)	**Hamburg**
DUSS-Terminal Hamburg-Billwerder	**Hamburg**
Eurocargo Container Freight Station and Warehouse GmbH	**Hamburg**
Hamburg Eurokombi	**Hamburg**
EUROGATE Container Terminal Hamburg (CTH)	**Hamburg**
Container Terminal Burchardkai (CTB)	**Hamburg**
Hamburg Altenwerder CTA	**Hamburg**
Hamburg Wallmann	**Hamburg**
Schenker Deutschland AG	**Essen**
Hamburg BUSS Hansa Terminal	**Hamburg**
AMB Steinwerder Distribution Center B.V.	**Hamburg**
PCH Packing Center Hamburg GmbH	**Hamburg**
Hamburg Süd-West-Terminal	**Hamburg**
Hamburg O´Swaldkai	**Hamburg**
Rostock Trimodal- RTM	**Rostock**
Railport Rostock	**Rostock**

		Berlin Westhafen	**Berlin**
		LDZ Elsterwerda	**Elsterwerda**
		Dresden-Friedrichstadt GVZ	**Dresden**
		Alberthafen Dresden-Friedrichstadt	**Dresden**
	Marshalling yards	**Maschen**	**Maschen**
		Bremen	**Bremen**
		Rostock Seehafen	**Rostock**
		Braunschweig	**Braunschweig**
		Seelze	**Seelze**
		Seddin	**Seddin**
		Magdeburg	**Magdeburg**
		Dresden-Friedrichstadt	**Dresden**
Hungary	Terminals	Ferencváros – Soroksári út	2 km
		Soroksári út – Soroksár	7 km
		Soroksár – Soroksár-Terminál	3 km
		Terminal ÁTI Györ by ÁTI DEPO Zrt.	Győr
		Railport Győr	Győr
		Port of Győr-Gönyű Logistics Center	Győr
		Sopron container terminal by GYSEV CARGO Zrt.	Sopron
		Metrans Terminal Budapest by METRANS, a.s.	Budapest
		Mahart Container Center	Budapest
		Rail Cargo Terminal BILK Budapest by BILK Kombiterminal Co. Ltd.	Budapest
	Marshalling yards	Ferencváros-Rendező	Budapest
		Szolnok-Rendező	Szolnok
Romania	Terminals	Railport Arad	Curtici
		Oradea Intermodal Vest	Oradea
		Cluj Napoca	Cluj Napoca
		Turda - Rofersped	Turda
		Semenic (Timişoara Sud)	Timisoara
		Allianso Terminal Ploiești	Ploiesti
		Bucureşti Sud	București, Ilfov
		Tibbett Logistics	Bucuresti, Ilfov
		Bucharest International Rail Freight Terminal (BIRFT)	București, Ilfov
		Bucharest Intermodal Terminal by Yusen Logistics Co., Ltd.	București, Ilfov
		UMEX Terminal Constanța	Constanța
		APM Terminal Constanța	Constanța
		DP World Constanța	Constanța
		SOCEP Terminal Constanța	Constanța
		Railport Arad	Curtici
	Marshalling yards	Chitila	Chitila (București)
		Brașov	Brașov
		Bucureşti	Bucureşti
		Ploiești	Ploiești
		Craiova	Craiova
		Simeria	Simeria
Slovakia	Terminals	TIP Žilina (Metrans)	Žilina - Teplička

		RCO Žilina	Žilina
		RCO Košice	Košice
		Terminal Kosice (Metrans)	Košice - Haniska pri Košiciach
		TKD Dobra	Dobra
		Bratislava Palenisko (Slovenská plavba a prístavy (SPaP) a.s.)	Bratislava
		Bratislava ÚNS – Rail Cargo Operator CSKD s.r.o	Bratislava
		Metrans Dunajská Streda	Dunajská Streda
		RCO Ružomberok (Lisková)	Ružomberok
		Bratislava východ	Bratislava
	Marshalling yards	Žilina - Teplička	Žilina
		Košice	Košce
		Čierna nad Tisou	Čierna nad Tisou

Table 2: Terminals on RFC Rhine-Danube

2.3 Bottlenecks

Bottlenecks which hinder smooth and competitive rail freight transport can be grouped into the following categories:

- infrastructural bottlenecks
  - Sections which do not meet the TEN-T requirements specified in Articles 15, 16, and 17 of the Regulation (EU) 2024/1679of the European Parliament and of the Council.
- operational bottlenecks
  - Capacity and traffic management issues during the train run.
- administrative bottlenecks
  - Effects of non-harmonised rules and procedures.
- capacity bottlenecks
  - Issues in relation with capacity planning and path allocation. This includes on the one hand, the lack of multi-annual planning of works due to missing multi-annual financing environment, on the other hand, congested infrastructure, too, which is defined in Art. 47 of Directive 2012/34/EU.

2.4 Corridor Governance

Information about the current governance structure of the Corridor can be found in chapter 1.4 of the CID and is displayed in this chapter, too.

A future integration of Serbia to the Corridor will require extending the participation in the organization structures. The Management Board of RFC Rhine-Danube is prepared to take the necessary steps.

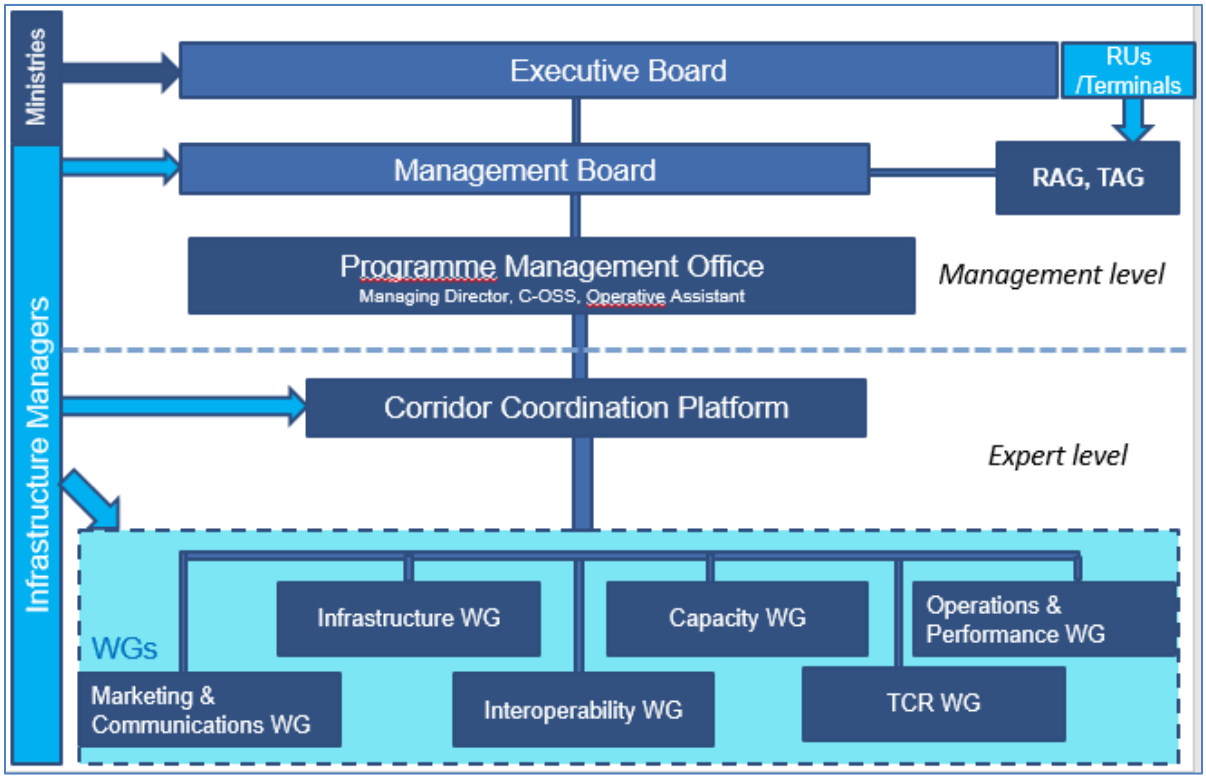


Figure 2: Governance structure for RFC Rhine-Danube

ETC Rhine-Danube was established based on the revised TEN-T Regulation published on 18 July 2024 and replaced the former Core Network Corridor (CNC) Rhine-Danube. As well as the former CNC, also the ETC Rhine-Danube is supervised by a European Coordinator. All nine ETC Coordinators are organizing the so-called Corridor Fora for experts and representatives of the different transport modes, including entities involved in the railway sector. The organization structure of RFC Rhine-Danube is looking forward to continue and, where appropriate and feasible, enhancing the close cooperation with the European Coordinator. Experts from the RFC are ready to contribute to the work of the ETC Coordinator within their competences, possibilities and to their best knowledge. The valuable experience of RFC experts and governance gained from the establishment and the management of the RFCs so far might be useful in many fields of the European Coordinator's work.

3 Market Analysis Study

In 2025, the Corridor has updated its Transport Market Study (TMS) within the framework of a joint project of all Corridors, which was coordinated by RailNetEurope (RNE).

The updated TMS confirmed, that the Corridor has a highly important strategic role, being one of the main East-West links across continental Europe. This role has further increased as a consequence of the corridor's enlarged geographical coverage as a consequence of the inclusion of lines of RFC Orient/East-Med. This extension i.a. gave it access to North-Sea- and Baltic-Sea-ports – in addition to the already previously existing connection to the Black Sea.

The essential elements of the updated Transport Market Study can be found on the following pages.

3.1 RFC RD 2024 Transport Market Study Results

The Rail Freight Corridor Rhine-Danube (RFC RD) is one of the 11 RFCs currently in operation, established under the scope of Regulation (EU) 913/2010 concerning a European rail network for competitive freight. According to Article 9.3 of Regulation (EU) 913/2010, the Management Board of the RFC shall carry out and periodically update a Transport Market Study (TMS) related to the observed and expected changes in the traffic on the freight corridor as a consequence of the RFC being established.

Over the past decade, RFCs elaborated first TMSs and, in most cases, TMS updates. However, these studies were carried out without a common approach or a shared methodological framework. To support the RFCs in achieving compliance with the above requirement in a coordinated and harmonised manner, the Management Boards of the 11 RFCs decided to execute a Joint TMS Update under the coordination of RailNetEurope (RNE). The main findings and results of the 2024 TMS Update for the RFC RD are summarised in the following paragraphs.

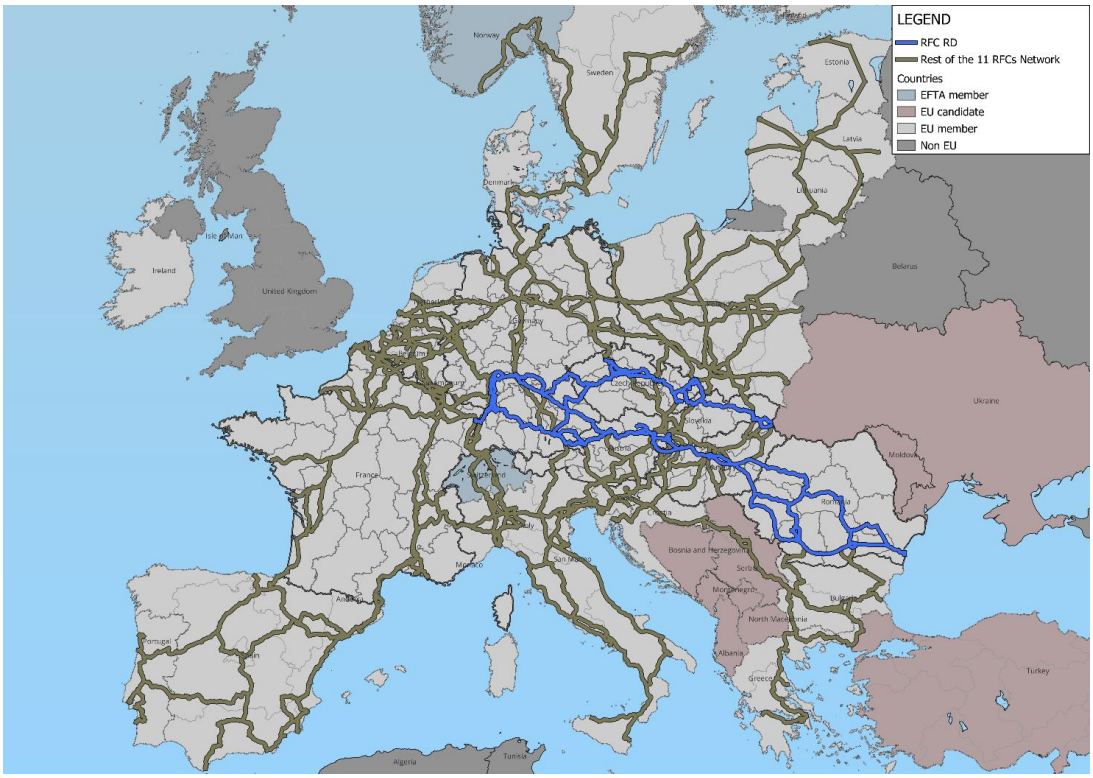


Figure 3: RFC RD within the network of RFCs (Source: RFC RD Transport Market Study)

For the analysis of the current and future transport markets along the 11 RFCs, a European-wide transport model has been used – the NEAC Model – which combines socio-economic, trade and transport statistics with traffic flows for different transport modes. The geographic scope of the model covers the European Union and the non-EU countries crossed by the 11 RFCs and involved in their catchment areas. The model has been calibrated to the year 2022 (Model Base Year). Future scenarios have been elaborated for the 2030 time horizon.

Due to the adoption of a common, network-wide approach and use of an EU-wide network model, the analysis of the individual RFCs has been performed within the framework of the 11 RFCs Network and overall European policy and market trends. This approach is also appropriate considering that the 11 RFCs share many infrastructure components, i.e. corridor lines, logistics nodes and Border Crossing Points, as well as their catchment areas. Also, regulatory, policy and economic backgrounds and developments, as well as most available statistics on the sector, generally concern the country or EU territorial scale.

Specifically concerning the study policy background, the 2024 11 RFCs Joint TMS Update has been conducted in the framework of the rail sector specific milestones introduced by the EC in its Smart and Sustainable Mobility Strategy to support the achievement of the ambitious target of the European Green Deal, of reducing transport emissions by 90% by 2050 (compared to 1990 levels), i.e., doubling passenger high-speed rail traffic by 2030 and tripling it by 2050, while increasing rail freight by 50% by 2030 and doubling it by 2050 (compared to 2015 levels). With reference to the 50% target growth set in the EU policies for the period 2015-2030, the following table provides transport volume figures in million tkm for the EU27 in 2015, and 2022. Data show that the gap to be filled between 2023 and 2030 is significant, especially for the international segment.

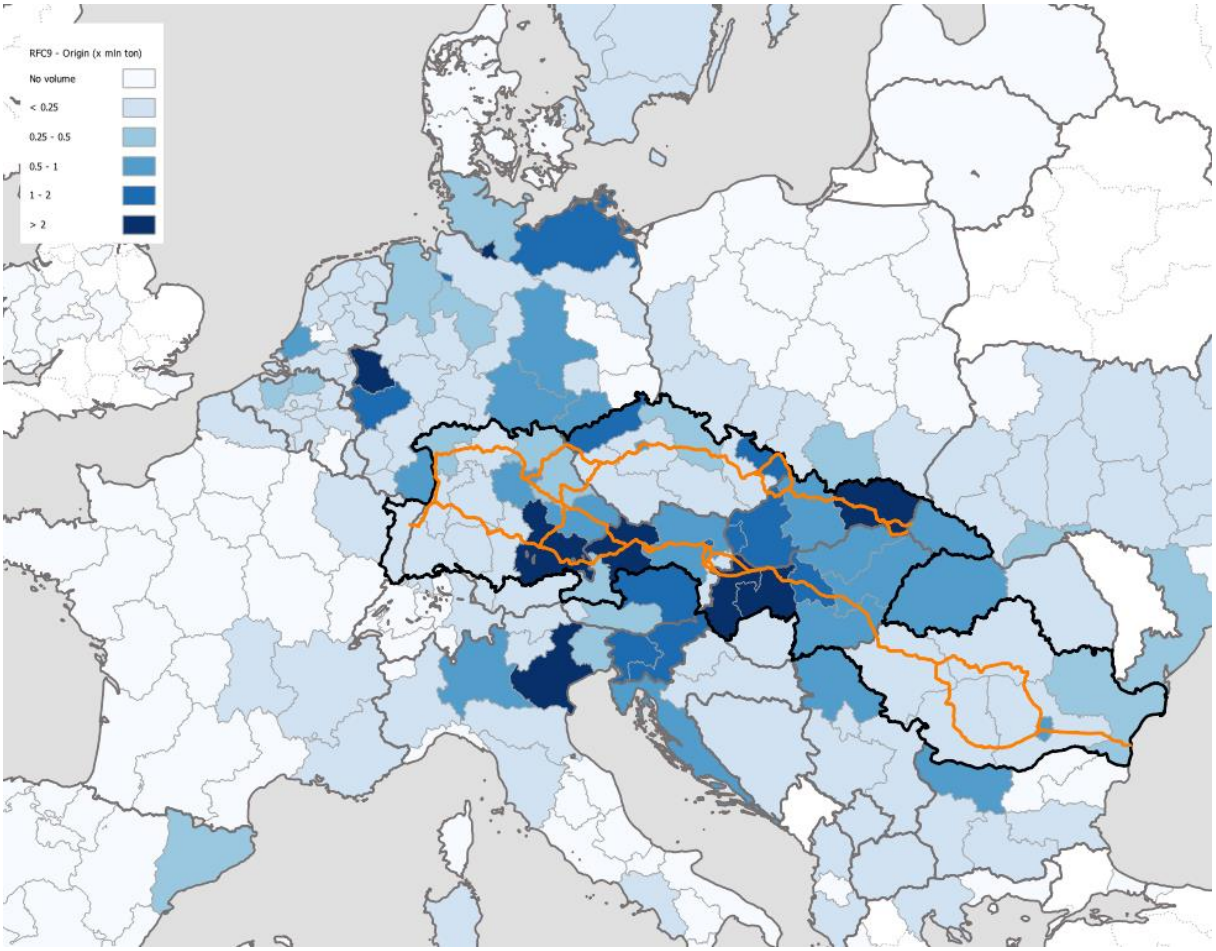
	2015	2022	Var. % '15-22
International rail freight transport	155,289	149,032	-4%
National rail freight transport	181,811	199,830	10%
Total rail freight transport	337,100	348,862	3%

Source: Eurostat [rail_go_typepas]; Notes: (1) Data for Belgium are excluded from the total as they are not available for 2015 and 2022. (2) Data are limited to main undertakings

Table 3: Freight volume (millon ton-kilometres) in 2015 and 2022

For the analysis of the current market (Base year scenario), train data from the Train Information System (TIS) managed by RNE have been used, which combined with available trade and economic data available at the NUTS 2 area, served as a basis to define the RFC RD catchment area and main origin and destinations, prior to estimate the volumes of the transported goods and the modal share by land transport mode.

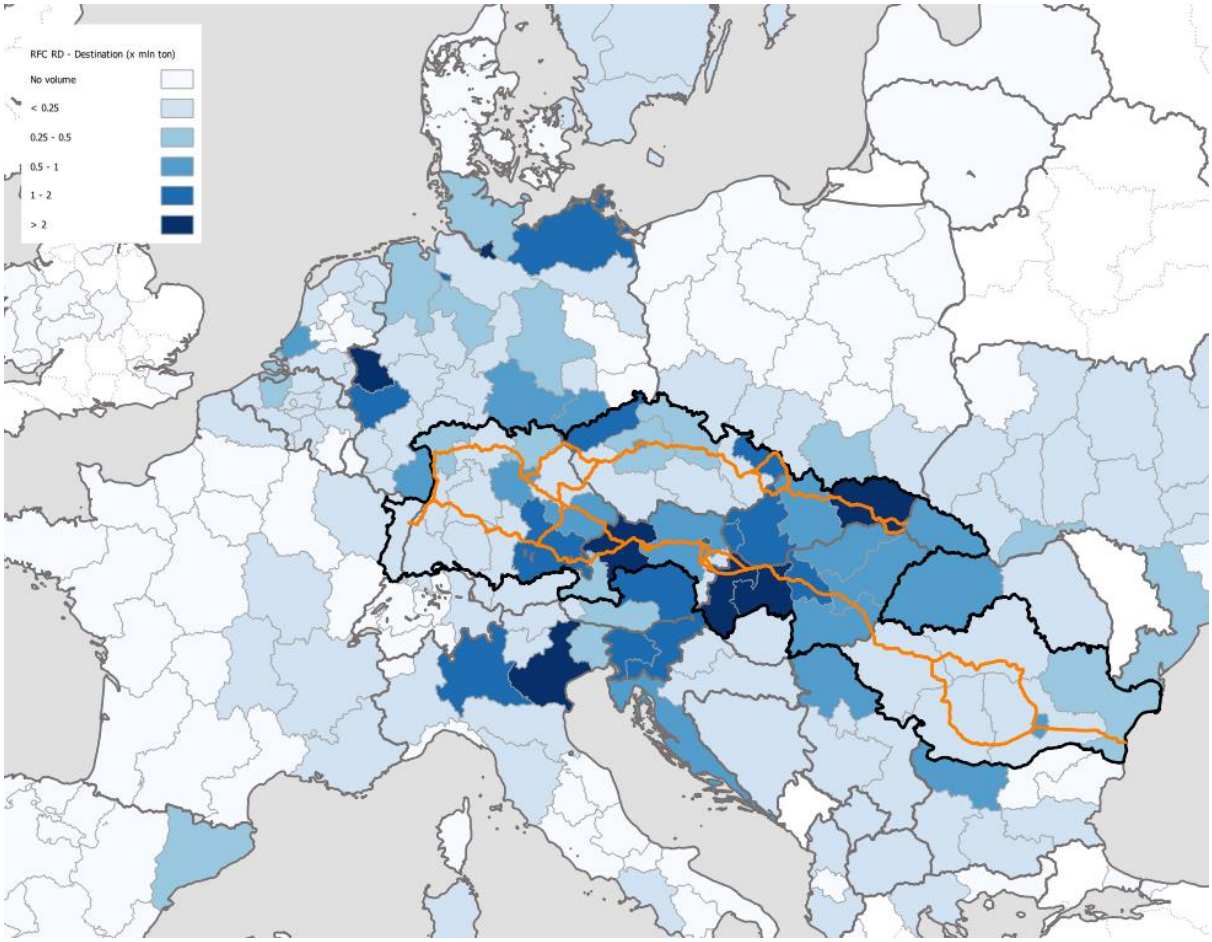
The catchment area for international rail freight transport of the RFC RD - namely the NUTS 2 regions where trains cross at least one RFC RD Border Crossing Point (BCP) have either their origin and/or destination – exceeds the corridor area, i.e. the area crossed by the corridor infrastructure (see overview in the overleaf figures). The RFC RD catchment area captures (large parts of) Germany, France, Czechia, Austria, Hungary, Slovakia and Romania. A large proportion of the rail freight transport uses the RFC RD, and its border crossing points, to ship freight by rail from different origins to different destinations. The picture below shows the origins in the catchment area of the RFC RD, with important origins such as Munich, Linz, East Slovakia, West Hungary, and Budapest. Also, outside the corridor area different zones can be seen that contribute to the RFC RD, such as the rest of Germany (Rhine-Ruhr area, Hamburg), France, Italy, Poland, Serbia, Greece, and Ukraine.



Legend: Orange = rail tracks of RFC RD. Blue = Volume by origin. Black = Delineation of corridor area

Figure 4: Origins of international rail freight volume (in million tonnes) in the RFC RD rail network catchment area (Source: RFC RD Transport Market Study)

The next figure presents the destinations within the RFC RD catchment area. The figure highlights similar zones as the origins that exhibit the high freight volumes dispatched from these destinations. It is evident from the figure that numerous zones benefiting from RFC RD's services fall outside the corridor area, such as areas in in the rest of Germany (Rhine-Ruhr, Hamburg), Italy (Veneto), Serbia, Croatia and Bulgaria.



Legend: Orange = rail tracks of RFC RD. Blue = Volume by origin. Black = Delineation of corridor area

Figure 5: Destinations of international rail freight volume (in million tonnes) in the RFC RD rail network catchment area (Source: RFC RD Transport Market Study)

For the purposes of the 2024 Joint TMS Update, future scenarios have been built only considering socio-economic and infrastructure developments. This solution reflects the decision to develop only short-term forecasts up to 2030 and adopt a pragmatic and as far as possible, concrete approach, thus omitting the simulation of the possible effects associated with policy developments such as:

- The proposed weights and dimensions directive and electrification of Heavy Goods Vehicles;
- The internalization of external costs of road transport (road pricing);
- Incentives to rail/combined transport operations;
- Technological/operational improvements of intermodal transport solutions and logistics chains;
- Market sensitivity to climate and energy transition.

In line with this approach, the following scenarios have been defined, all of them at the 2030 time horizon:

- Reference or background scenario: It describes the economic developments (in terms of GDP changes), which have the most important impacts on the future of rail transport.

The base for this is the EU reference 2020-2050 scenario and the World Economic Outlook 2023.

- Projects scenario: It provides an overview of the impacts resulting from the expected developments in the rail transport system. Actually, a number of projects are ongoing and/or planned for the improvement of the railway infrastructure belonging to the 11 RFCs Network. Such projects were first identified in the 11 RFCs Implementation Plans, which were further confirmed by the 11 RFCs. Furthermore, the list of the investments planned for the development of the 9 TEN-T Core Network Corridors was consulted to integrate the information available from the RFCs. The ongoing and planned investments differ in size. Some are big projects such as Rail Baltica or the Fehmarnbelt. But there are also many investments related to the modernisation and rehabilitation of railway lines to meet the TEN-T standards, improve network interoperability or increase capacity by upgrading railway lines and nodes. Not all projects have been considered for future scenarios simulation purposes. First of all projects have been selected which are assumed to be completed before or in 2030. Second, only major projects were considered which should be able to 'translate' into a time gain or cost reduction. This approach reflects the purpose of the study and nature of the model, limited to freight market analysis and thus transport volumes and modal share estimation by land transport mode, excluding network capacity simulation and assessment, and looking at the short-term time horizon.
- Sensitivity scenario: the completion of the TEN-T network at standard in 2030: It provides an overview of what would happen if – in addition to the investments included in the projects scenario - ERTMS is fully introduced, 740 meter long trains are allowed to operate anywhere on the whole network, 22.5 tonnes axle load is achieved on the entire network, intermodal loading gauge is also possible along the RFCs and if the RFCs network rail gauge in Spain and Portugal meets European standards (the Rail Baltica initiative, provided UIC and more generally TEN-T standard interconnectivity to the three Baltic States with Europe is already considered in the Projects scenario). This TEN-T completion scenario should be considered as a sensitivity analysis, as the projects required to reach the TEN-T standards will not be fully implemented before 2030.

In the absence of a consistent historical series of data and information on the operations along the 11 RFCs – worth also considering that the RFCs were established and entered into operation in different years between 2013 and 2020, and their alignment adjusted over time to reflect market needs – an e-survey was conducted as part of the 2024 Joint TMS Update – 2023 11 RFCs Joint TMS Update Survey – to assess the occurred and expected changes associated with their establishment on three main areas: occurred and expected impact of the RFCs, occurred and expected market developments along the RFCs, and market drivers. The survey involved the Railway Undertakings Advisory Groups (RAGs) and Terminal Advisory Groups (TAGs) of the 11 RFCs.

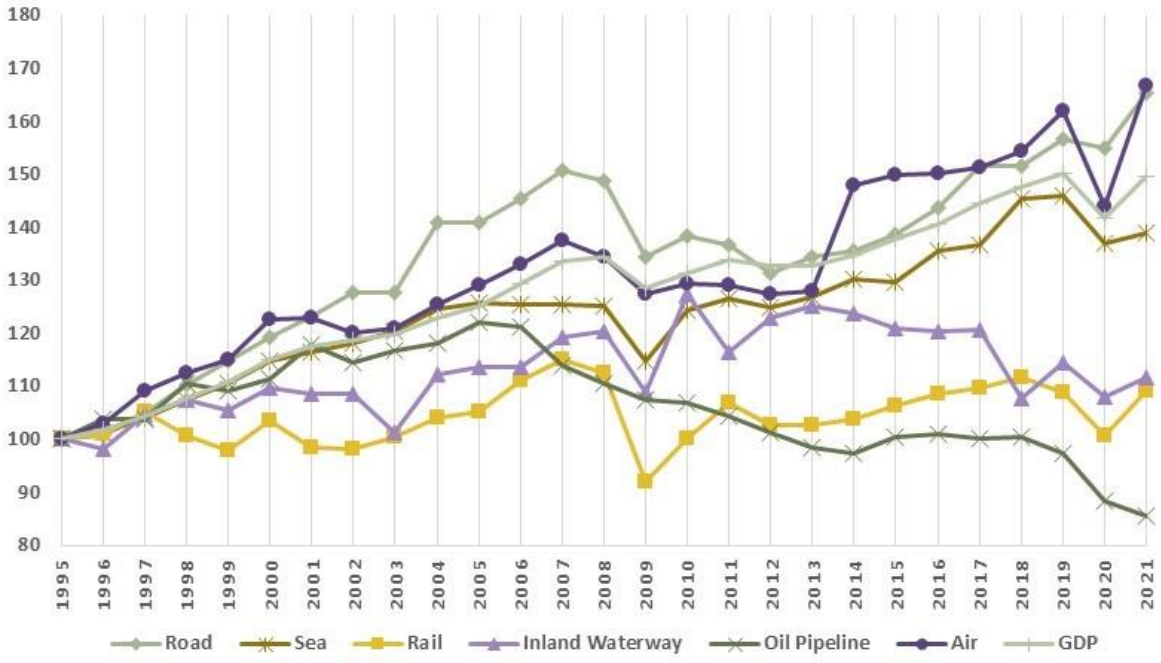
3.2 Key study findings on the rail freight market in Europe and along the RFC Rhine-Danube

Overall market trends and sector developments

The data available from the EC DG MOVE/Eurostat (Statistical Pocketbook 2023 and Rail Market Monitoring Report) and from the Independent Regulators Group (IRG) (Rail Market Monitoring Reports) provide an overview of the development of the European rail freight sector since mid of the 1990s when the rail freight market liberalization started, allowing monitoring trends before and after the 2008 credit crunch, which is considered the second major financial

crisis after the 1930s Great Depression, and which was followed by additional adverse events during the past 10-15 years when the 11 RFCs were gradually established and entered into operation. Key findings from the statistical analysis are as follows:

- The period since the entry into force of the rail freight regulation has indeed been marked by a number of socio-economic, health and geopolitical events, which negatively impacted trade and transport flows at the global and European scale. The statistical review shows that the above-mentioned 2008 financial crisis basically altered the economic and transport developments experienced by Europe over the previous decades. EU27 long-term series over the past 30 years show that the effects of this crisis are persisting: albeit positive, the trend of GDP and most transport modes of the following period stands indeed at lower growth rates. Overall, the European rail freight market grew modestly over the last decade, contrasting with the strong development experienced between 2001 and 2008. The EU economy and transport markets were more recently further impacted by the 2020-2021 COVID-19 pandemic and by the current geopolitical crisis that started in 2022 with the Russian-Ukrainian war and deteriorated with the Israel-Gaza conflict and Red Sea crisis.



Source: EC – DG MOVE – Statistical Pocketbook 2023

Figure 6: Transport trends – indexed values of ton-kilometres (1995 = 100)

- Rail freight transport between 2013 and 2021 marginally grew in the EU27 from about 385 billion tkm to 410 billion tkm, i.e. 7%, which is only half of the rate of growth of total transport volumes and GDP. However, over the same period combined transport more than doubled from about 41 billion tkm to 100 billion tkm. Trends for the RFC RD countries are similar to the EU ones, specifying that the growth of rail freight transport registered higher rates. In countries along the RFC RD rail freight transport grew from about 209 to 231 billion tkm, i.e. 10%;

- Most RFC RD countries are among the ones registering a higher rail modal share in the EU. Five out of seven countries are positioned within the ten first-ranking EU countries for rail modal share in 2022.

	2008	2013	2015	2019	2022	Var. '19-'13	Var. '22-'13	Var. '22-'08
Lithuania	64.5	57.2	56.4	56.8	37.2	-0.4	-20	-27.3
Switzerland	35.3	36.0	37.2	34.1	33.4	-1.9	-2.6	-1.9
Slovakia	**40.0**	**38.6**	**36.3**	**30.7**	**30.1**	**-7.9**	**-8.5**	**-9.9**
Austria	**33.3**	**31.9**	**32.3**	**30.6**	**30.0**	**-1.3**	**-1.9**	**-3.3**
Slovenia	26.7	30.5	30.9	31.4	28.8	0.9	-1.7	2.1
Hungary	**24.9**	**30.3**	**29.1**	**26**	**26.3**	**-4.3**	**-4.0**	**1.4**
Latvia	47.9	43.1	42.3	37.4	26.0	-5.7	-17.1	-21.9
Czechia	**31.9**	**28.0**	**26.1**	**25.9**	**22.0**	**-2.1**	**-6.0**	**-9.9**
Romania	**19.9**	**23.3**	**25.0**	**20.5**	**21.0**	**-2.8**	**-2.3**	**1.1**
Poland	30.5	24.2	23.3	21.5	20.8	-2.7	-3.4	-9.7
Germany	**14.6**	**13.9**	**14.1**	**13.7**	**14.9**	**-0.2**	**1.0**	**0.3**
Bulgaria	10.3	7.5	8.7	8.5	11.2	1.0	3.7	0.9
Finland	13.1	12.7	10.9	11.8	10.8	-0.9	-1.9	-2.3
Sweden	10.3	9.6	8.6	9.4	10.5	-0.2	0.9	0.2
Belgium	8.2	6.8	6.9	7.2	7.3	0.4	0.5	-0.9
Luxembourg	9.8	7.2	7.0	6.8	6.1	-0.4	-1.1	-3.7
European Union - 27 countries (from 2020)	6.0	5.7	5.7	5.3	5.5	-0.4	-0.2	-0.5
Croatia	4.5	3.1	3.2	3.5	4.1	0.4	1.0	-0.4
France	**4.2**	**3.6**	**4.1**	**3.5**	**3.7**	**-0.1**	**0.1**	**-0.5**
Italy	2.6	2.4	2.6	2.3	2.7	-0.1	0.3	0.1
Estonia	10.4	7.6	4.5	3.3	2.4	-4.3	-5.2	-8.0
Norway	2.0	1.9	1.6	1.6	2.1	-0.3	0.2	0.1
Netherlands	2.0	1.7	1.8	1.8	1.9	0.1	0.2	-0.1
Denmark	1.4	1.8	1.9	1.7	1.6	-0.1	-0.2	0.2
Spain	0.8	0.8	0.9	0.8	0.8	0.0	0.0	0.0
Portugal	0.3	0.3	0.3	0.3	0.2	0.0	-0.1	-0.1
Ireland	0.1	0.1	0.1	0.1	0.1	0.0	0.0	0.0
Greece	0.2	0.0	0.1	0.1	0.1	0.1	0.1	-0.1

Source: Eurostat

Table 4: Rail market share of total freight transport in % (based on ton-kilometres)

- At the same time, Czechia, and Slovakia are also among the ones that have registered a high decline in rail modal share over time. This is a general trend at the EU27 scale that is likely related to the change in the commodity basket trade. At both EU 27 and RFC RD related country levels, there is an underlying stagnation or decline of dry and liquid bulk commodities (originating even from before the mid of the 1990s), associated with a growth of intermodal transport, a market segment that is apparently growing with the gradual opening of the rail freight market and greening of logistics chains;
- At the EU27 scale, the COVID-19 pandemic seems to have had different impacts on rail freight traffic measured in net tkm, with either increases or decreases in transport volumes between 2019 and 2021. The negative impact has been apparently significant in the Baltic States, Denmark, Luxembourg, Portugal, and Romania, whereas Bulgaria

and Greece experienced about 20% growth. Most of the counties along RFC RD registered positive variations during the pandemic period. Baltic States, in particular, also experienced a significant drop in traffic since the start of the Russian-Ukrainian war in 2022. In fact, EU sanctions implemented with Belarus and Russia following the start of the Ukrainian conflict impacted rail freight traffic negatively in the Baltic States, whereas rail freight traffic between Ukraine/Moldova and the EU has increased, particularly through Poland and Romania;

- Since the start of the rail freight liberalisation process in the late 1990's and 2000's, the market share of the domestic incumbent RUs gradually declined in most EU Member States, whereas the market share of non-incumbents increased together with the operations of foreign incumbents. As a general pattern, common to the EU27 and countries along RFC RD , the trend of the market share of domestic incumbents continued to decline in the period between 2013-2021. In the countries along RFC RD, the market share of the domestic incumbents in 2021 was about 50% on average; the market share of national andinternational incumbents was about 60% on average.

Analysis oft the current and future freight transport market along the 11 RFCs network

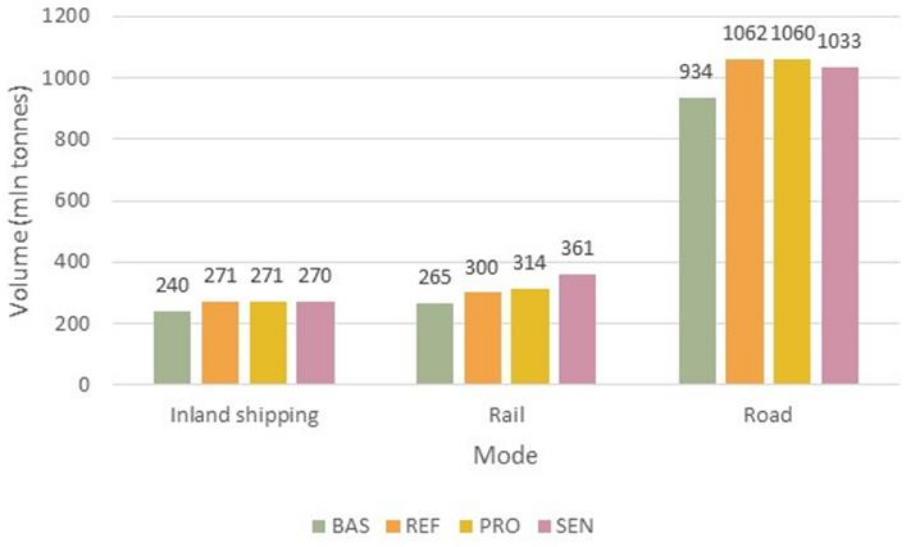
The total volume of international freight transport over land for the 11 RFCs Network catchment area is 1,439 million tonnes. The volume of international rail freight transport is 265 million tonnes (about 442 thousand international trains), which is 18% of the total amount of transport to, from, and within the catchment area of the 11 RFCs Network. The share and volume of inland shipping (IWW) is 17% (240 million tonnes), and the share of road transport is 65% (934 million tonnes).

Concerning the cargo types, the category Other (general cargo, including intermodal transport and container) dominates the international freight transport for the 11 RFCs Network, by 845 million tonnes of volume. This is about 59% of all international freight transport. This cargo type is mostly transported by road (about 69%). Dry bulk is the second largest cargo type at 32% (465 million tonnes). Liquid bulk has as share of 9% (128 million tonnes) in the total volume of international freight transport over all land modes.

Source: NEAC estimations

Figure 7: Estimated volume (million tonnes) and share of international freight transport over land by mode and cargo type within the catchment area of the 11 RFCs Network.

The three future scenarios (Reference, Projects and Sensitivity) show an increase in international freight transport in general. Within the 11 RFCs Network catchment area, due to economic growth (EU Reference and UN), the increase in general is about 18%. This is in line with the GDP growth for the EU27, which is 17%. Inland shipping shows a growth of 13% (from 240 to 271 million tonnes), road has a growth of 14% (from 934 to 1062 million tonnes) and rail transport of 13% (from 265 to 300 million tonnes). In the absence of further developments, the rail freight market is expected to grow at a slower pace compared to GDP and to the overall transport sector, therefore losing market share. This is due to the changing trends in the basket of transported commodities and differentiated geographic demand growth distribution. For all land freight transport, the projects scenario and the sensitivity scenario have a limited impact on the overall growth of international freight transport.



Source: NEAC estimations; Legend: BAS Base year scenario; REF Reference scenario, PRO Projects scenario; SEN: Sensitivity scenario

Figure 8: Development of volume (in million tonnes) by mode and scenario for the 11 RFCs Network catchment area.

Focusing on international rail freight transport, the reference scenario expects a growth of 13%, which is approximately 35 million tonnes extra compared to the 2022 situation. Both the Projects scenario and the Sensitivity scenario show the impact of the different rail projects and rail measures. In the Projects scenario, rail transport grows an extra 4% compared to the reference scenario (300 million tonnes to 313 million tonnes) due to projects. In total this is approximately 13 million tonnes of extra international rail freight transport.

The hypothetical Sensitivity scenario shows that compared to the reference, there is a potential of 61 million tonnes extra rail freight transport due to longer trains, 22.5 t axle load, ERTMS, and standard gauge on the Iberian Peninsula. The total expected rail freight transport volumes in this scenario reaches 361 million tonnes, corresponding to a 20% growth compared to the Reference scenario.

Considering both economic and infrastructure developments, the Sensitivity scenario can be regarded as a potential maximum growth for rail transport across the 11 RFCs Network. Compared to the 2022 base year, transport volumes would increase from 265 to 361million

tonnes i.e. by 36%, out of which around 1/3 is due to economic development and 2/3 to infrastructure investments.

As a result of the analysis performed, it is possible to conclude that the major planned projects along the 11 RFCs Network assumed to be completed by 2030, and the modernisation of railway lines and cross-border sections, are fundamental to removing infrastructure bottlenecks and reducing travel times and transport costs. Such initiatives are expected to increase competitiveness of rail transport on the 11 RFCs Network, and thus on each RFC, including the RFC RD. Further to these projects, completing the 11 RFCs Network in line with the TEN-T requirements is key to increase the rail market share.

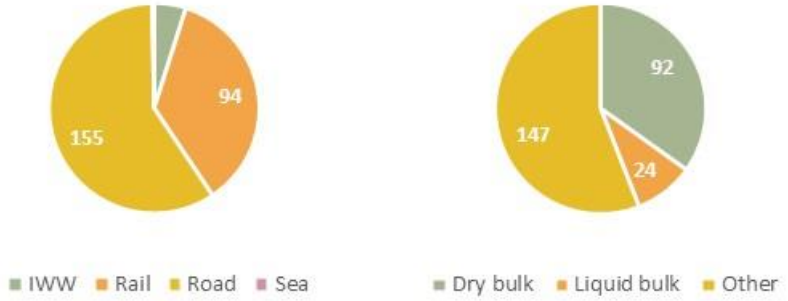
With reference to the 50% growth set in the EU policies for the period 2015-2030, the observed growth for the period 2015-2022 and expected for the time frame 2023-2030 (+36%) still lags below the target. Therefore, the development of a high-quality and interoperable network does not seem to be sufficient to achieve the ambitious targets set in the relevant European transport policies, an outcome that would hardly change even assuming additional mega cross-border projects would be completed like Brenner and Turin-Lyon.

Such targets remain challenging to meet in the absence of a significant change in the structure of the costs of road and rail transport. Internalising external costs of road transport, and or incentives to reduce the costs of rail transport might be needed. The potentially negative impacts on rail market share of measures such as improving the efficiency of road transport shall also be considered, as also reported in a recent study by the Community of European Railway and Infrastructure Companies (CER) – Study on Weights and Dimensions: Impacts of the Proposed Amendments to the Weights and Dimensions Directive on Combined Transport and Rail Freight Transport . Market opening appears also to be relevant in increasing the competitiveness of rail transport. A recent study by the European Rail Freight Association (ERFA) – The European Rail Freight Market; Competitive Analysis and Recommendations – considers how non-incumbent operators, focussing on the fast-growing intermodal and logistics train segments, are likely to experience further growth in market share in the 2020s. According to the study, competition amongst railway undertakings has made rail more attractive compared with road, which can be partially explained by the business model of non-incumbents, more focused (i.e., intermodal and logistics, block trains, and international traffic), lean and agile, and cost competitive, able to offer better service levels consistently.

Analysis of the current and future freight transport market along RFC Rhine-Danube

International freight transport across all modes in the catchment area of the RFC RD amounts to 263 million tonnes. The international rail freight transport volume in this area is estimated at 94 million tonnes (about 100.000 trains). This is 36% of the total amount of transport for the RFC RD. The share of inland shipping is 5%, the share of road transport 59%. Sea shipping does not play an important in this RFC (less than 1 million tonnes).

Concerning the cargo types, Other (General cargo, including intermodal transport and container) dominates the international freight transport within the catchment area of the RFC RD, with a volume of 147 million tonnes. This is about 56% of all international freight transport for the RFC RD. Dry bulk is the second largest cargo type at 35%. Liquid bulk has a share of 9% in the total volume of international freight transport over all modes in the catchment area of the RFC RD.



Source: NEAC estimations

Figure 8: Estimated volume (million tonnes) and share of all international freight transport by mode and cargo type in the catchment area of RFC RD

On relations within the catchment area of RFC RD, rail freight transport has a share of 36% in the total amount of international freight transport. This is a volume of 94 million tonnes. The total amount of international rail freight transport of 94 million tonnes relates to approximately 100,000 trains within the corridor area of RFC RD.

The most important rail transport origins and destinations can be found in Germany, Austria, Slovakia and Hungary, in locations such as Munich and Linz. The most important relation is between East Slovakia and Ostrava (vv). Other important relations are Landshut -Linz and Munich-Linz.

Source: NEAC estimations; Legend: BAS Base year scenario; REF Reference scenario, PRO Projects scenario; SEN: Sensitivity scenario

Figure 9: Development of volume (in million tonnes) by mode and scenario for the corridor area of RFC RD

The three future scenarios (Reference, Projects and Sensitivity) show an increase in international freight transport in the RFC RD in line with what expected at the European level.

Mainly due to autonomous economic growth, the increase in general is about 13%, in the RFC RD growth is also 13%. This is in line with the GDP growth for the EU27 which is 17%. In the RFC RD, rail has a growth of 12%, inland shipping and sea shipping grow by 11%, and road has a growth of 14%. In the absence of further developments, the rail freight market is expected to grow a bit less compared to GDP and to the overall transport sector, therefore slightly losing market share. For all freight transport, the Projects scenario and the sensitivity scenario have an impact on the overall growth of international freight transport, especially in the RFC RD.

In the RFC RD, for the Reference scenario, a growth of international rail transport is expected at 13%, which is approximately 11 million tonnes extra compared to the 2022 situation. This would be (rounded) 112,000 extra international freight trains in the RFC RD.

The Projects scenario shows the impact of the different rail projects and rail measures. In the Projects scenario rail transport grows an extra 1% compared to the reference scenario. In total it is estimated that this is approximately 1 million tonnes of extra international rail freight transport. This gives (rounded) 2,000 extra trains in the RFC RD. Together with the Reference scenario results, this would be approximately 114,000 trains for the RFC RD.

The Sensitivity scenario shows that there is another potential of 17 million tonnes extra rail freight transport mainly due to longer trains. The total number of unique international freight trains would then be around 115,000. Compared to the 100,000 unique trains in 2022, this is a growth of around 15%. This figure can be regarded as a potential maximum growth.

Overall, the sensitivity scenario can be regarded as a potential maximum growth for rail, considering both economic and infrastructure developments. Compared to the 2022 base year, transport volumes would increase from 94 to 123 million tonnes i.e. by 31%.

Occurred and expected changes due to the establishment of the RFCs

The e-survey conducted to collect the opinion of the 11 RFCs RAGs and TAGs members on the occurred and expected impact of the establishment of the RFCs, involved 42 representatives of the RAGs and 30 members of the TAGs, who submitted valid questionnaires between September 2023 and January 2024. Whereas the overall number of responses makes the survey outcome meaningful for the analysis of the occurred and expected changes at the 11 RFCs Network scale, an analysis specific to each individual RFC would not be statistically significant. The survey results are accordingly used in the 2024 11 RFCs Joint TMS Update for the 11 RFCs Network. It is worth noticing that the survey responses reflect the views of the respondents at the time of submission of the questionnaire (Autumn 2023/January 2024). They furthermore represent a partial view of the market as the sample of the respondents is not representative of the market universe; and may contrast with the findings from the statistical review presented in the previous section above, as the opinions relate to the RFCs and international trains, whereas national statistics refer to the whole country network and national as well as international traffic. The main findings from the survey are summarised in the following bullet points for each of the three investigated areas.

Occurred and expected impact of RFCs, in the areas of governance, operational efficiency and capacity management

- The opinion of the 11 RFCs RAGs and TAGs members about the changes within the governance area is positive, especially in terms of cooperation with the market, including but not limited to RUs and terminal operators, as well as concerning facilitation of discussion among Member States about the issues affecting the competitiveness of international rail freight transport. The opinion about the progress made regarding cooperation between RFCs and Core Network Corridors

(CNCs)/ERTMS horizontal priority is less favourable. The market opinion is unfavourable about the progress made on harmonising international freight rail services' legislative, regulatory, procedural and operational aspects. The expectations of the market players concerning the future impact of the programmes and activities of the RFCs are relatively positive concerning all aspects. Respondents consider the cooperation between RFCs and an EU Network of Infrastructure Managers (ENIM) as assumed in the proposal for the new capacity regulation, to be the best governance solution for bringing issues forward;

- The stakeholders' opinion about the changes that occurred within the operational efficiency area is also generally positive, except for the progress made in the promotion of technical and operational harmonisation of the European railway transport system towards its interoperability. The respondents' expectations concerning the future impact of the programmes and activities of the RFCs are relatively positive concerning all the assessed issues related to operational efficiency. Cooperation between RFCs and an EU Network of Infrastructure Managers (ENIM) is also considered the best-fitting governance solution to bring operational efficiency issues forward;
- The respondents' opinions about the changes that occurred within the capacity management area are predominantly unfavourable. Notwithstanding the market's negative opinion of the progress made since the establishment of the RFCs in this area, the expectations on the future impact of the programmes and activities by the RFCs are rather positive with regard to all the investigated aspects related to capacity management. The best governance solution for capacity management improvements is deemed to be the cooperation between the RFCs and an EU network of Infrastructure Managers (IMs).

Occurred and expected market developments

- The vast majority of the e-survey respondents operated or still operate rail services or manage/operate terminals serving trains across at least one border crossing point on any of the RFCs. Most of them also operated or served international rail freight transport before the establishment of the RFCs. The majority of the respondents declare they experienced an increase in their operations since 2013, and most of them also have a positive expectation about the future, expecting overall market growth;
- The variation in traffic experienced by RUs and terminal operators since 2013 is positive for the RFC RD. The majority of the respondents declare they experienced market growth along the corridor.
- The prevailing type of international trains operated on the RFCs Network consists of intermodal trains, followed by conventional block trains and single-wagon load trains. Most RUs and terminal operators experienced growth in intermodal train operations in the past years, whereas the trend for conventional block and single-wagon load trains is predominantly stable. Most respondents have a positive expectation for the future in terms of traffic growth for all market segments;
- Concerning traffic between logistics nodes, most operations relate to Port to Rail-Road Terminal (RRT) transport, followed by RRT to RRT services and Port to Port operations. Experienced variations by RUs were mostly positive for the Port to RRT or RRT to RRT segments and stable for the Port to Port one. Terminal operators have predominantly experienced growing trends in all market segments in the past years. The vast majority of RUs and terminal operators are expecting positive future trends for the three market segments;

- Regarding service distances, most operations cover distances between 300 km and 900 km, followed by services covering distances longer than 900 km and below 300 km. RUs experienced mostly positive variations for services covering distances longer than 300 km and declared the market is stable for operations below 300 km. Terminal operators have predominantly experienced growing trends in all market segments in the past years. The vast majority of RUs and terminal operators are expecting positive future trends for the three market segments.

Market drivers

- RUs and terminal operators have very similar views about the effects of the main market drivers on the growth of international rail freight transport in the short term, i.e., up until 2030. Most identified drivers are expected to have positive effects as they are assumed to improve rail transport's competitiveness. At the same time, the geopolitical context and socio-economic outlook, as well as the shortfall of the labour force, are perceived as threats;
- The socio-economic outlook is ranked first by the market, followed by infrastructure development and interoperability, policy and economic incentives to promote shift to rail. Increased performance of rail freight services and harmonisation of procedures and national legislation to improve cross-border operations are the two most relevant market drivers, according to the respondents, if considering both first and second-ranking options;
- Allthough indicated as having a potential negative impact on the market, labour shortages and geopolitical context are not ranked among the most critical market drivers. Finally, technological improvements towards better integration and increased efficiency of multimodal logistics chains, better-integrated RFCs and terminal capacity management do not seem to be considered priority issues by the RUs and terminal operators.

3.3 Recommendations on facilitating and strengthening the rail freight market along the 11 RFCs and RFC Rhine-Danube

In line with the overall study approach aimed at conducting the 2024 RFC RD TMS Update as part of a Joint TMS Update of the 11 RFCs, study recommendations are primarily formulated focussing on the short-term development of the 11 RFCs belonging to the European rail network for competitive freight. RFCs share indeed both infrastructure and market, and more importantly a same EU policy background and overall socio-economic and geopolitical challenges despite some differences between Eastern and Western as well as Northern and Southern European countries. The 2024 11 RFCs Joint TMS Update allows for an estimation of the current market with reference to the RFCs catchment areas based on a common approach and tool, and for an overall assessment of the impact of the development of the 11 RFCs Network towards the development and completion of the TEN-T network at standard. In line with the methodology decided to be adopted for the 2024 11 RFCs TMS Update, no assessment of the current and future capacity was performed as part of the study and no detailed quantitative assessment of the current and future market operations by the operators along the individual RFCs and with reference to the expansion or new construction of individual projects and logistics nodes. The adopted approach albeit appropriate for an assessment of the market and modal share of the individual RFCs as part of the 11 RFCs Network, does not allow capturing RFCs specific market elements, especially the ones related to operational aspects. Study recommendations have been formulated around two main areas: market developments and targets and institutional and operational developments.

Market developments and targets

The simulations made in the study demonstrate that major projects, and particularly the completion of the TEN-T network at standard, would significantly increase the competitiveness of rail freight transport. The post-COVID recovery and the recent geopolitical crises caused delays in the implementation and completion of the projects needed to complete a high quality and interoperable TEN-T network. Price increases and shortages of construction materials particularly affected the advancement of ongoing and planned projects. A high-quality and interoperable network might, furthermore, not be sufficient to achieve the ambitious targets set in the relevant European transport policies, in the absence of a significant change in the structure of the costs of road and rail transport. The following recommendations are proposed to support market development towards the achievement of the EU policy targets:

- Timely complete the development of a high-quality, interoperable network:
    - Building missing links and removing infrastructure bottlenecks increasing infrastructure capacity by adding new tracks and lines where needed, increasing their speed and improving their gradient, can solve congestion problems, save energy and reduce transport costs as well as improve travel times. Such developments are relevant at the network level, but produce effects also at the individual corridor scale;
    - Achieving the requirements set in the TEN-T Regulation towards a Single European Railway Area, i.e. 740 meter long trains, ERTMS, 22.5 tonnes axle load, intermodal loading gauge, UIC gauge, electrification, is fundamental to support the development of a Single European Railway Area;
    - Support intermodal and combined transport. The intermodal market is the most promising international rail freight market segment, requiring improvement of interconnectivity between main railway lines and terminals, increasing the capacity of the existing terminal infrastructure, investing in technologies to facilitate and speed up transport and transhipment operations, and tracking and making more reliable the transport of intermodal units along logistics chains and within logistics clusters.
    - Stronger cooperation between all involved parties for better effectiveness in the availability and use of funds and the definition of investment implementation strategies focussed on those sections of the network with higher market potential. For over a decade, the sector has benefited from a stronger TEN-T policy with a dedicated Connecting Europe Facility Fund. Among the different transport modes involved in the TEN-T network, rail and rail cross-border initiatives are treated as a priority. However, the available financial resources are limited overall compared to the financial needs that would be necessary to complete all projects. Investing in infrastructure might not be sufficient, e.g. to be operational, ERTMS also requires rolling stock to be equipped with onboard units.
- Introduce market regulatory and policy measures to increase the competitiveness of rail freight transport. Although not a specific subject of this study, regulatory and policy measures might be necessary to facilitate and foster the rail freight market in Europe towards the achievement of higher market shares and EU policy targets. Rail freight transport is generally more expensive and less flexible compared to road transport. Internalising external costs of road transport, and/or creating incentives to reduce the costs of rail transport would increase its competitiveness and support the achievement

of the ambitious EU policy targets. In this respect, policymakers shall also consider the potential effects on the modal share of measures improving the efficiency of road transport. As emphasised in the above-mentioned study by ERFA regulatory measures facilitating market opening appear also to be relevant in increasing the competitiveness of rail transport (e.g. enforcement of antitrust regulations; unbundling of subsidised public service operations from open market business; and ending direct subsidies to or recapitalization of state-owned freight railway undertakings).

Institutional and operational developments

Recommendations on institutional and operational developments are formulated as follows, according to the findings from the market consultation (2023 11 RFCs Joint TMS Update Survey), conducted as part of the 2024 11 RFCS Joint TMS Update:

- Improve capacity management. Capacity management is considered by the market and also by the analyses and studies at the basis of the proposal for the new capacity regulation, a key area for improvement. Progress was made in the management of Temporary Capacity Restrictions, however capacity planning remains an issue. Digital Capacity Management as an integral part of the European program “Timetable Redesign (TTR) for Smart Capacity Management” is at the core of the proposal for the new capacity regulation, and it is paramount to reaching Green Deal targets for the transport sector and the rail freight segment within it.
- Monitor operational performance. The revised TEN-T regulation identifies new operational requirements, related to punctuality and dwell times at borders. Furthermore, some infrastructure requirements also depend on operations, such as 740 meter long trains. Investing in infrastructure, albeit needed, is long-lasting and capital-intensive. The competitiveness of international rail freight transport also depends on the improvement of cross-border operations and integrated/coordinated planning and management of the rail network at the European scale. An RFCs common KPI framework is already in place, and RNE is also already monitoring infrastructure KPIs. Such activities might be continued in light of the new set of requirements foreseen in the revised TEN-T Regulation (EU) 1679/2024 and RFC governance structure, also defined in the Art. 67 of this regulation.
- Balance network and corridor governance approach. The analysis of the RFC catchment areas shows that international trains using at least one corridor BCP may actually use more than one RFC. A network approach is more fitting to the planning and management of the network capacity. Geographical specificities and logistics clusters and chains exist that still make the corridor concept useful, especially to support discussion and coordination among IMs and Member States and for a customer-oriented approach aimed at involving RUs and Terminal Operators. This consideration also seems to be in line with the opinions expressed by the 11 RFCs RAGs and TAGs members in the survey conducted as part of this study.

4 List of Measures

This chapter lists a schedule for certain measures necessary for the further implementation and development of the Corridor.

The update of the Implementation Plan does not contain details on the list of measures taken by RFC Rhine-Danube to ensure the execution of the planned activities. Updated information on these activities can be found in other published documents on the website of RFC Rhine-Danube. The links below can be found in the relevant Corridor Information Document (CID) paragraphs of RFC Rhine-Danube. The CID for RFC Rhine-Danube can be found i.a. under the following link: https://rfc-rhine-danube.eu/cid-books/ (see also chapter 4.7 below).

4.1 Coordination of Planned Temporary Capacity Restrictions

The currently applicable processes related to Planned Temporary Capacity Restrictions are described in chapter 4.4 of the CID.

Upon request of the RU Advisory Group, improvement actions should be defined by identifying best practices.

4.2 Corridor OSS

The tasks of the C-OSS, the legal background, and the related documentation are described in section 4.2 of the CID.

4.3 Capacity Allocation Principles

The currently applicable process including the first step of the geographical alignment of the Corridor, which incorporates the partial inclusion of RFC OEM into it,is described in detail in Chapter 4.3 of the CID.

According to the revised TEN-T regulation, RFC OEM operation was dissolved on 31st of March 2025. To ensure a smooth transition and continuous C-OSS service, Reserve Capacity for timetable 2025 was offered by RFC RD for those lines of RFC OEM which are now part of RFC RD.

All in all, RFC RD is already offering and managing capacity on former RFC OEM lines except in Bulgaria and Greece, where the former RFC OEM lines will be managed by RFC Alpine Western-Balkan.

Further, in mutual agreement with RFC North-Sea-Baltic,the C-OSS of RFC RD has become the responsible C-OSS on the overlapping section with RFC North-Sea-Baltic.

For the PaP offer for timetable 2026, RFC RD published PaPs according to the new ETC alignment:

- New lines from German harbours via Bad Schandau/Decin to Czechia, which were previously managed by RFC OEM and RFC North-Sea Baltic, taking over RFC OEM lines in Slovakia, Hungary and Romania as well.

For the PaP offer for timetable 2027, RFC RD will publish PaPs according to the new ETC alignment, which will involve the following extensions:

- New lines from Budapest via Kelebia to Belgrade and from Belgrade to Timisoara in Romania

RFC RD will publish Reserve Capacity when the extensions in Hungary, Serbia and Romania are completed.

4.4 Applicants

Information on how RFC Rhine-Danube manages Applicants can be found in Section 4.3.2 of the CID.

4.5 Traffic Management

IMs coordinate international traffic with neighbouring IMs on a bilateral level. In this manner, they ensure that all traffic on the network is managed in the most optimal way.

Detailed rules and procedures regarding traffic management along the Corridor are described in Chapter 4.5 of the CID.

4.6 Traffic Management in Event of Disturbance

The communication procedure and the available tools are described in Chapter 4.5.3 of the CID.

4.7 Corridor Information Document

The Corridor Information Document is published by the 2nd Monday of January every year together with the PaP catalogue and is kept regularly up-to-date. It complies with the Corridor Information Document Common Texts and Structure of RailNetEurope. It is published on the website of the Corridor (https://rfc-rhine-danube.eu/cid-books/), in the CIP (https://cip.rne.eu), as well as in a digital form on the RNE Network and Corridor Information portal via http://nci.rne.eu/.

4.8 Quality Evaluation

The provisions of Article 19 of the Regulation set requirements regarding the quality evaluation of rail freight services on the Corridor.

The performance of the Corridor is measured through key performance indicators listed in Chapter 5.

5 Objectives and Performance of the Corridor

The general objectives of the Corridor approved in 2023 by the Executive Board are as follows:

- Increasing the modal share of rail freight,
- Improving procedures and facilitating accessibility of railways, and
- Providing better, more reliable services.

The Corridor aims to reach these objectives by :

- Attracting customers with the services of the C-OSS, providing easier access for customers in order to reduce the drawback of different national systems.
- Facilitating solving issues that need higher level attention especially when out of the transport sector.
- Continuous improvement of processes concerning the operation of the railway infrastructure.

In particular, the objectives specific to the core processes capacity management and train performance management are described on the following pages.

Under Article 19 of the revised TEN-T Regulationthe Executive Board and the Management Board shall make all possible efforts to ensure by 31 December 2030, that, on the Corridor as the rail freight backbone of the RD European Transport Corridor, the quality of services provided to railway undertakings and technical and operational requirements for infrastructure use do not prevent the operational performance of rail freight services along the European Transport Corridors from meeting the following target values:

(A) at least 75% of the freight trains crossing at least one border along the European Transport Corridor arrive at their destination, or at the external Union border if their destination is outside the Union, at their scheduled time or with a delay of less than 30 minutes by reasons that are attributable to the infrastructure manager(s) of the Union: delays occuring in and attributable to third countries that are crossed by freight trains shall not be taken into account.

(B) for each cross border section, the dwelling time of all freight trains crossing the border between two Member States does not exceed 25 minutes on average, except at the section where change of track gauge takes place or where the checks carried out at a border where the controls have not yet been lifted on trains in application of point 1.2 of Annex VI to regulation (EU) 2016/399[2] do not allow for this time-limit to be complied with: the dwelling time of a train on a cross-border section means the total additional transit time that can be attributed to the existence of the border crossing, irrespective of procedures or considerations of infrastructural, operational, technical and administrative nature: dwelling time does not include the time that cannot be attributed to the border crossing, such as operational procedures carried out in facilities located in the proximity of the border crossing but not intrinsically related to it.

The Corridor aims to meet the requirements of the Regulation within the deadline set by the TEN-T Regulation[3].

[2] Regulation (EU) 2016/399 of the European Parliament and of the Council (11) imposes in particular to carry out checks on train passengers and on railway staff on passenger and goods trains crossing external borders.

[3] Art. 6(1) of the TEN-T Regulation stipulates the following general deadlines: The completion of a core network by 31 December 2030, of an extended core network by 31 December 2040 and of a comprehensive network by 31 December 2050.

Cross-border cooperation:

In order to facilitate the above objectives regarding punctuality and dwell time, the Corridor promotes cross-border cooperation groups comprising neighbouring IMs, RUs, and eventually terminals regarding the critical border sections.

Primarily, such activities comprise the strengthening of cross-border cooperation between neighbouring IMs, the RUs using the border sections concerned, and the terminals operating at and feeding the border sections concerned. The aim is to remove barriers at the borders, thus create as efficient, fast, and seamless crossing of trains at the borders as possible. To this end, IMs, RUs, and terminals are working in close cooperation with each other. Regular monitoring and meetings are conducted to jointly identify the obstacles, create concrete improvement measures, and ultimately to implement them. An important indicator for assessing the quality of international rail freight traffic at the borders is the KPI measuring the dwell time.

Capacity:

The C-OSS handles exclusively the capacity products on the Corridor (Pre-arranged Paths (hereinafter referred to as PaPs), Reserve Capacity etc.). PaPs for the annual timetable are provided by the IMs/AB to the C-OSS. The PaPs are based on standard parameters for rail freight and previously coordinated between the IMs/AB at the borders so to enable for attractive running times.

The path catalogue of PaPs is published by the C-OSS by the 2nd Monday of January of each year for the next timetable period. Reserve Capacity on the Corridor is available from October of each year on, to allow for ad-hoc path applications. The offer of the C-OSS is displayed in the IT-application PCS (Path Coordination System) provided by RNE.

According to the RFC Regulation, the aim is to offer capacity via the C-OSS is to have “one face to the customer” for international path requests along the Corridor and at the end harmonized path offers across at least one border. Furthermore, the decision on the PaP pre-allocation is done by the C-OSS by the end of April for the entire international PaP segment on basis of one harmonized allocation rule. As a result, the RUs will get an earlier information about the PaP pre-allocation.

KPIs:

To measure the fulfillment of the above objectives and steer performance, the MB has adopted the following KPIs, which are commonly applicable to all other Rail Freight Corridors as well.

The KPIs are published in the annual reports published on the website of the Corridor and in the CIP.

Name of KPI	Calculation formula	Source of data	Timing of calculation	Target
Volume of requested capacity (PaPs)	Km*days requested	PAMT report in PCS	At X-8	Increase four-year moving average by 4.5% each year
Volume of pre-booked capacity (PaPs)	Km*days (pre-booking phase)	PAMT report in PCS	At X-7.5	Increase four-year moving average by 4.5% each year
Ratio of pre-booked capacity – PaPs (to the volume of capacity offered at x-11)	Km*days offered	PAMT report in PCS	At X-7.5	increase ratio each year
Average planned speed of PaPs	Average of the planned commercial speed of the PaPs on the O/D pair concerned per direction	PAMT report in PCS	At X-11	when classified into four categories (divided by 30, 40 and 50 km/h), at least one category step-up each year
Punctuality at origin	The share of all RFC-related trains at RFC entry with a delay less than, or equal to, the threshold compared to all RFC-related trains at RFC entry.	TIS	At the end of January after the timetable year concerned	difference of the two not exceeding 10%
Punctuality at destination	The share of all RFC-related trains at RFC exit with a delay less than, or equal to, the threshold compared to all RFC-related trains at RFC exit.	TIS	At the end of January after the timetable year concerned	
Number of Trains crossing a border along the RFC	Total number of train runs having a RA on selected pairs of border points	TIS	At the end of January after the timetable year concerned	annual increase of 4.5%
Train kilometres of Trains crossing a	Sum of O/D distances of all trains crossing a	TIS	At the end of January after the timetable year concerned	annual increase of 4.5%

Border along the RFC	border along the RFC			
Dwell times in border sections – planned dwell	Average planned dwell time of all international freight trains crossing the RFC border in the main measuring points, where border crossing related procedures usually occurs	TIS	At the end of January after the timetable year concerned	25 minutes on Schengen borders
Dwell times in border sections – real dwell	Average real dwell time of all international freight trains crossing the border along the RFC in the main measuring points, where border crossing related procedures usually occurs	TIS	At the end of January after the timetable year concerned	25 minutes on Schengen borders

Table 5: Key Performance Indicators adopted for RFC Rhine-Danube

6 Cooperation and consultation in the frame of the Implementation Plan

6.1 Procedure of the cooperation with the advisory groups

In order to fulfill the requirement on the consultation of the Railway and Terminal Advisory Groups on infrastructure and investment needs, the PMO on behalf of the Management Board has carried out a consultation of RAG and TAG on the ETC Rhine-Danube Project List of rail-related projects during April/May 2025. The outcomes of this consultation are presented in sub-chapter 6.2.

The PMO on behalf of the Management Board has also carried out a consultation of the RAG and TAG on the Implementation Plan during June 2025. The results of this consultation are presented in sub-chapter 6.3.

6.2 Views and assessment of advisory groups regarding corridor development

The Railway Advisory Group provided its feedback on the ETC Project List by e-mail in form of comments on individual projects included in the list.

20 projects in the list received the comment “high priority / very high priority / urgent”, 2 projects the comment “medium priority” and 4 projects the comment “low priority”. Especially for projects in the first group often justifications were given, referring to the role of a railway line in the rail network. Commonly featuring among those justifications were the positive impact of a project on capacity and/or the importance of a rail line as additional/alternative route for rail freight or the possibility opened by the project for a stronger separation of freight and (fast) passenger traffic.

For 2 projects comments were also addressing challenges stemming from impacts of works on traffic operations and underlining the importance of early information and consultation of railway undertakings about work-related line closures or capacity restrictions. These comments concern on-going projects.

The remainder of the projects did not receive any comments. No new projects were suggested and neither any projects were suggested to be removed.

RFC RD forwarded the comments to the ETC Coordinator respectively its assistant, as previously agreed.

6.3 Results of the consultation of the draft Implementation Plan

In connection with the consultation of the draft Implementation Plan feedback was received from the Advisory Groups, while from the Executive Board no comments were received, except in one case, addressing purely a minor editorial issue.

The comments by the Advisory Groups were primarily asking for certain clarifications and highlighted some findings from the Transport Market Study in chapter 3.2 in the section “Occurred and expected impact of RFCs, in the areas of governance, operational efficiency and capacity management”. The highlighted findings were the following:

- Respondents consider the cooperation between RFCs and an EU Network of Infrastructure Managers (ENIM) as assumed in the proposal for the new capacity regulation, to be the best governance solution for bringing issues forward;

- Cooperation between RFCs and an EU Network of Infrastructure Managers (ENIM) is also considered the best-fitting governance solution to bring operational efficiency issues forward;
- The expectations on the future impact of the programmes and activities by the RFCs are rather positive with regard to all the investigated aspects related to capacity management. The best governance solution for capacity management improvements is deemed to be the cooperation between the RFCs and an EU network of Infrastructure Managers (IMs).

Regarding the latter point the question was raised, whether it really reflects the outcome of the survey carried out in connection with the TMS. In this regard, the Management Board considers the conclusions correctly reflecting the outcome of the survey, at least for the point of time, when the TMS respectively the survey was carried out. However, in the light of the legal environment for the RFCs constantly evolving – in particular in connection with the up-coming Capacity Regulation – the content of the conclusions may change in the future.

Further, a comment was made concerning the paragraph “Institutional and operational developments” in chapter 3.3 (Recommendations on facilitating and strengthening the rail freight market along the 11 RFCs and RFC Rhine-Danube). The comment emphasized, that “TCRs remain THE issue”, asking for more focus on “the negative development of TCR volumes in the near future, also and especially on RFC RhD” with closures of the Nürnberg – Passau line in 2026 explicitly mentioned. Since the text in chapter 3.3 has been taken from the TMS, no changes were made to the text of that chapter; however, the Management Board takes well note of the comment and recognizes the high importance, which RUs address to TCRs and the concerns expressed by them. The Management Board will discuss the issue and address it jointly with the Advisory Groups, i.a. in up-coming meetings with the Advisory Groups. The Management Board would also like to draw attention to national and cross-border coordination activities in the context of major TCRs – especially those falling under Annex VII of Directive 2012/34/EU.

In chapter 4.4 (List of Measures) better references and more details were asked. Therefore, in this final version of the Implementation Plan references to the Corridor Information Document (CID) were strengthened. Additional details were, however, not included in this Implementation Plan, in order to avoid possible inconsistencies between the CID and this Implementation Plan in case the CID should become updated.

Annex

The annex is fully updated and include data for the new routing of the Corridor in Hungary and Romania aligned with the routing of ETC Rhine-Danube, the initial lines of the Corridor, as well as for those lines which are transferred from RFC OEM to this Corridor. Therefore, these data are not fully in line yet with the geographical routing of the ETC Rhine-Danube. The full geographical alignment of the data also including an extension in Serbia will potentially be completed in a next step of the update of this Implementation Plan.

Section Name	Country	IM	Line Category	Traction Power	Signalling Class B	Signalling Class A	Intermodal Freight Code	Gauging	Gradient Dir 1	Gradient Dir 2	Track Gauge	Number Of Tracks	Maximum Train Length	Maximum Speed	Usage
Trnava - Leopoldov	SK	Železnice Slov	D4	AC 25kV-50Hz	no class B system	ETCS L1 / SRS 2.3.0d / SV1.0	P/C 99/429	GC	<5	<5	1435	Double-track	700 - 740/750 m	≥ 121 km/h	Passenger & Freight
Leopoldov - Veľké Kostoľany	SK	Železnice Slov	D4	AC 25kV-50Hz	no class B system	ETCS L1 / SRS 2.3.0d / SV1.0	P/C 99/429	GC	<5	<5	1435	Double-track	700 - 740/750 m	≥ 121 km/h	Passenger & Freight
Trenčín - Trenčianska Teplá	SK	Železnice Slov	D4	AC 25kV-50Hz	no class B system	ETCS L1 / SRS 2.3.0d / SV1.0	P/C 99/429	GC	<5	<5	1435	Double-track	700 - 740/750 m	≥ 121 km/h	Passenger & Freight
Nové Mesto nad Váhom - Trenčín	SK	ŽSR	D4	AC 25kV-50Hz	no class B system	ETCS L1 / SRS 2.3.0d / SV1.0	P/C 99/429	GC	<5	<5	1435	Double-track	700 - 740/750 m	≥ 121 km/h	Passenger & Freight
Veľké Kostoľany - Nové Mesto nad Váhom	SK	ŽSR	D4	AC 25kV-50Hz	no class B system	ETCS L1 / SRS 2.3.0d / SV1.0	P/C 99/429	GC	<5	<5	1435	Double-track	700 - 740/750 m	≥ 121 km/h	Passenger & Freight
Trenčianska Teplá - Ladce	SK	ŽSR	D4	AC 25kV-50Hz	no class B system	ETCS L1 / SRS 2.3.0d / SV1.0	P/C 99/429	GC	<5	<5	1435	Double-track	700 - 740/750 m	≥ 121 km/h	Passenger & Freight
Ladce - Púchov	SK	ŽSR	D4	AC 25kV-50Hz	no class B system	ETCS L1 / SRS 2.3.0d / SV1.0	P/C 99/429	GC	<5	<5	1435	Double-track	700 - 740/750 m	≥ 121 km/h	Passenger & Freight
Budapest (Soroksár) - Kelebia	HU	MÁV	upon request	AC 25kV-50Hz	upon request	upon request	upon request	upon request	<5	<5	1435	upon request	upon request	upon request	Passenger & Freight
Potsdam Wildpark West - Saarmund	DE	DB InfraGO	D4	AC 15kV-16.7Hz	PZB 90	no class A system	P/C 80/410	DE3	16 - 20	16 - 20	1435	Double-track	upon request	up to 120 km/h	Passenger & Freight
Saarmund - Genshagener Heide	DE	DB InfraGO	D4	AC 15kV-16.7Hz	PZB 90	no class A system	P/C 80/410	DE3	16 - 20	16 - 20	1435	Double-track	upon request	up to 120 km/h	Passenger & Freight
Genshagener Heide - Glasower Damm West	DE	DB InfraGO	D4	AC 15kV-16.7Hz	PZB 90	no class A system	P/C 80/410	DE3	<5	<5	1435	Double-track	upon request	up to 160 km/h	Passenger & Freight
Glasower Damm West - Glasower Damm Ost	DE	DB InfraGO	D4	AC 15kV-16.7Hz	PZB 90	no class A system	P/C 80/410	DE3	<5	<5	1435	Double-track	upon request	up to 160 km/h	Passenger & Freight
Glasower Damm West - Blankenfelde (Kr Teltow-Fläming)	DE	DB InfraGO	D4	AC 15kV-16.7Hz	PZB 90	no class A system	P/C 80/410	DE3	>20	>20	1435	Double-track	upon request	up to 120 km/h	Passenger & Freight
Potsdam Wildpark West - Potsdam Wissenschaftspark Golm	DE	DB InfraGO	D4	AC 15kV-16.7Hz	PZB 90	no class A system	P/C 80/410	DE3	16 - 20	16 - 20	1435	Double-track	upon request	up to 120 km/h	Passenger & Freight
Potsdam Wissenschaftspark Golm - Brieselang Hasselberg	DE	DB InfraGO	D4	AC 15kV-16.7Hz	PZB 90	no class A system	P/C 80/410	DE3	16 - 20	16 - 20	1435	Double-track	upon request	up to 120 km/h	Passenger & Freight
Brieselang Hasselberg - Falkenhagen (b Nauen)	DE	DB InfraGO	D4	AC 15kV-16.7Hz	PZB 90	no class A system	P/C 80/410	DE3	>20	>20	1435	Double-track	upon request	up to 120 km/h	Passenger & Freight
Falkenhagen (b Nauen) - Hohen Neuendorf West	DE	DB InfraGO	D4	AC 15kV-16.7Hz	PZB 90	no class A system	P/C 80/410	DE3	<5	<5	1435	Double-track	upon request	up to 120 km/h	Passenger & Freight
Hohen Neuendorf West - Schönfließ West	DE	DB InfraGO	D4	AC 15kV-16.7Hz	PZB 90	no class A system	P/C 80/410	DE3	<5	<5	1435	Double-track	upon request	up to 120 km/h	Passenger & Freight
Hohen Neuendorf West - Birkenwerder (b Berlin)	DE	DB InfraGO	D4	AC 15kV-16.7Hz	PZB 90	no class A system	P/C 80/410	DE3	6 - 10	6 - 10	1435	Double-track	upon request	up to 100 km/h	Passenger & Freight
Elsterwerda - Falkenberg	DE	DB InfraGO	D4	AC 15kV-16.7Hz	PZB 90	no class A system	P/C 80/410	DE3	6 - 10	6 - 10	1435	Double-track	upon request	up to 100 km/h	Passenger & Freight
Hamburg Hbf - Hamburg Ericus	DE	DB InfraGO	D4	AC 15kV-16.7Hz	PZB 90	no class A system	P/C 80/410	DE3	11 - 15	11 - 15	1435	Double-track	upon request	up to 100 km/h	Passenger & Freight
Hamburg Ericus - Hamburg Oberhafen	DE	DB InfraGO	D4	AC 15kV-16.7Hz	PZB 90	no class A system	P/C 80/410	DE3	11 - 15	11 - 15	1435	Double-track	upon request	up to 100 km/h	Passenger & Freight
Kavelstorf - Rostock Hbf	DE	DB InfraGO	D4	AC 15kV-16.7Hz	PZB 90	no class A system	P/C 80/410	DE3	0 - 20	0 - 20	1435	Double-track/partly single-track	upon request	up to 100 km/h / 120 km/h	Passenger & Freight
Rostock Hbf - Warnemünde	DE	DB InfraGO	D4	AC 15kV-16.7Hz	PZB 90	no class A system	P/C 80/410	DE3	0 - 15	0 - 15	1435	Double-track	upon request	up to 100 km/h / 120 km/h	Passenger & Freight

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