



Atlantic Rail Freight Corridor Observatory

TAG RAG Meeting
Paris - 2017/09/20



Objective

- **Monitoring of the economic evolution of the corridor's catchment area**
- **Analysis of the corridor's activity**
- **Develop communication and feedback with the clients of the corridor**

Inputs

- **Available data and statistics**
- **KPI's from the Corridor management**
- **Interviews with stakeholders**

Outputs

- **Periodically updated report**
- **Client oriented monitoring**
- **Scorecards**

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Objectives

- The main objectives of this survey are:
 - To help the development of railway freight activity
 - To ensure the optimal satisfaction of the users of the corridor
- The interviewed stakeholders are gathered into three categories:
 - Railway Undertaking
 - Shippers & Forwarders
 - Terminal Manager

Inputs

- Surveys with stakeholders from Portugal, Spain, France and Germany on satisfaction and traffic on the corridor

Outputs

- Annually Issued Report

A questionnaire in 2 parts

Opinion concerning the rail transport offer in the corridor

Topics	Opinion	More details
Confidence in the sustainability of rail access (confidence in no rail offer restriction risks in the future, closure of tracks, terminals, due to unaffordable maintenance costs and/or insufficient traffics)	<input type="checkbox"/> High <input type="checkbox"/> Medium high <input type="checkbox"/> Medium low <input type="checkbox"/> Low	
Satisfaction concerning technical characteristics of rail network (restrictions concerning maximum train length, clearance gauge, electrification, etc. ...)	<input type="checkbox"/> High <input type="checkbox"/> Medium high <input type="checkbox"/> Medium low <input type="checkbox"/> Low	
Satisfaction concerning inter-modal terminal (sufficient length for manoeuvre /splitting and grouping tracks, electrification, etc. ...)	<input type="checkbox"/> High <input type="checkbox"/> Medium high <input type="checkbox"/> Medium low <input type="checkbox"/> Low	
Satisfaction concerning capacity in railway terminal (load/unload)	<input type="checkbox"/> High <input type="checkbox"/> Medium high <input type="checkbox"/> Medium low <input type="checkbox"/> Low	
Other		

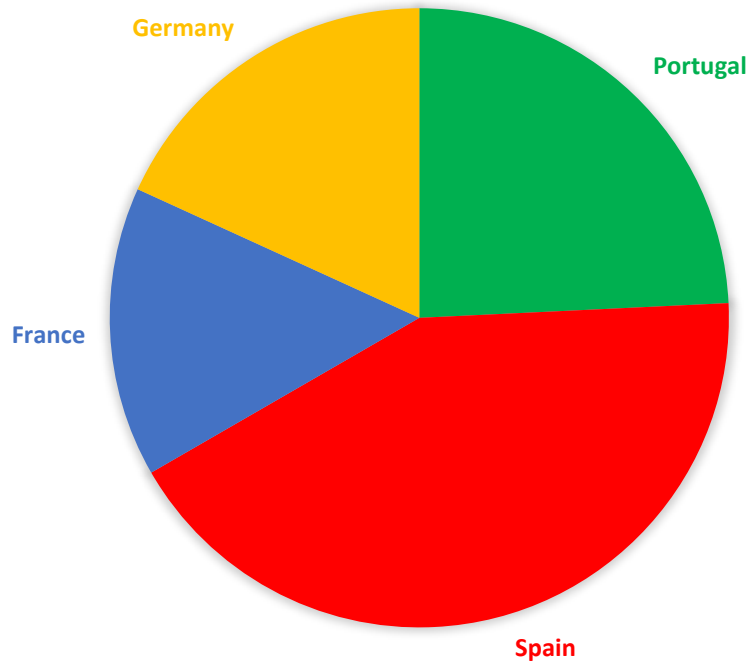
Potential traffic evolution

Topic	Let us know
Origin/destination of the traffics in the Corridor	
Economic sector / industry of these traffics	
Current mode of transport	
Current volumes: TEU, tons, trains per week, wagons	
Factors that could trigger an increase of your traffics: new regular line, better path, traffic consolidation, gauge enhancement, capacity increase, price strategy, intermodal offer, terminal capacity enhancement	
Potential appraisal: % of growth or decrease (tons, TEU...) of your traffics	
Focus on service quality competitiveness: Why are other modes more interesting? What is the difference concerning service quality level? Need of door-to-door offer?	
Focus on cost competitiveness: Why are other modes more interesting? What is the difference concerning logistic costs?	

GENERAL RESULTS

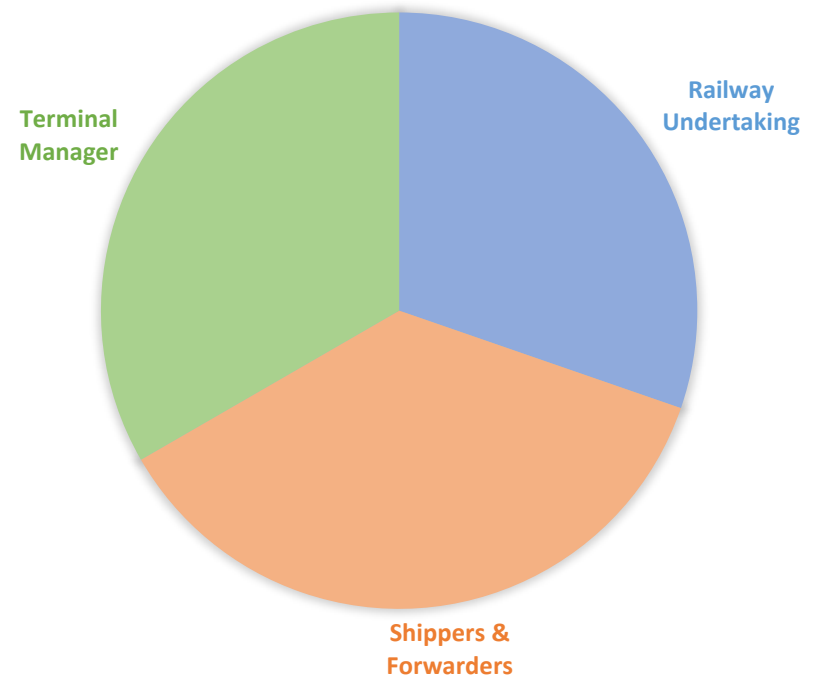
Filled Questionnaires per Country

FILLED QUESTIONNAIRES PER COUNTRY



Filled Questionnaires per Stakeholder Category

FILLED QUESTIONNAIRES PER STAKEHOLDER CATEGORY



PORTUGAL

Portugal received eight responses to the satisfaction survey :

- **Railway undertakings:**
 - MEDWAY (former CP Carga);
 - TAKARGO;
- **Terminal manager:**
 - Administração do Porto de Leixões - APDL;
 - Administração do Porto de Aveiro - APA;
 - Administração dos Portos de Setúbal e Sesimbra - APSS;
- **Shippers & Forwarders:**
 - Renault Cacia (automotive industry);
 - MEGASA - Siderurgia Nacional (iron and steel industry);
 - The Navigator Company – Logística Outbound (paper industry) .

PORTUGAL

MAIN CONCERNS

- **Costs**
 - High costs in relation to competitive modes
 - Traffic risk lies on rail operator
- **Rail Network**
 - Length limitations of crossing/overtaking stations
 - High slopes
 - Low commercial speed
 - Lack of direct path from Lisboa / Setúbal / Sines to Elvas/Badajoz (Spain border)
- **Maintenance**
 - Lack of coordination among the infrastructure managers
 - Long maintenance periods
 - Lack of train path options when ongoing maintenance
- **Rail Operator**
 - Low flexibility to meet clients needs
- **Terminal**
 - Train length limits in different terminals
 - Reduced terminals working periods, not compatible with train slots

PROPOSALS

- **Improving terminal management by splitting operation and management**
- **Terminal managers should be appointed for security reasons and to resolve in due time conflicts between operators**

SPAIN

- Spain received fourteen responses to the satisfaction survey :
- Railway undertakings:
 - Acciona Rail
 - Comsa Rail Transport
 - Continental Rail
 - Renfe Mercancías
- Terminal managers:
 - ADIF
 - Puerto de Algeciras
 - Puerto de Bilbao
 - Puerto de Pasajes
- Shippers & Forwarders:
 - Grupo Algeposa
 - EUCONSA
 - INDORAMA Ventures Química
 - Servicios Intermodales Bilbao Port
 - Transportes Mixtos Especiales, SA (TRAMESA)
 - Transfesa

SPAIN

MAIN CONCERNS

- **Costs**
 - High costs in relation to other modes of transport
- **Rail Network**
 - Length limitations of the trains
 - Low commercial speed
 - Penalty for changing operations and width in the border (Spain – France)
 - Restriction section located in Bobadilla – Algeciras
- **Maintenance**
 - Possible traffic problems during the works of third parties in access to ports
- **Rail Operator**
 - Operator strategies need to be more focused on the market.
- **Terminal**
 - Train length limits in different terminals
 - Lack of adequacy of terminals and ports time tables to the RUs needs
- **Traffics**
 - Interaction with commuter services in big cities generate delays in freight services
 - Loss of competitiveness of dangerous goods transported by rail with respect to road transport
 - Low offer of logistics operators. More competitiveness is needed
 - Difficulty to identify potential clients in the hinterland
- **Industrial facilities**
 - Logistic and industrial facilities location should be favorable to rail transport (rail access)

FRANCE

- France received five responses to the satisfaction survey :
- Railway undertakings:
 - SNCF Réseau* ;
 - SNCF Logistics ;
 - VHA;
- Terminal manager:
 - Grand Port Maritime de Bordeaux
- Shippers & Forwarders:
 - NOVATRANS.

**SNCF Réseau was answering the survey on behalf of their interaction with railways undertaking and their understanding of their expectations*

FRANCE

MAIN CONCERNS AND PROPOSALS

- **Train path**
 - Lack of visibility,
 - Concerns regarding adequacy, flexibility and reliability,
- **Maintenance**
 - Impact of track works on train operation causing several stops and long delays
 - Loss of revenues and increase of rail charges
 - Unreliability of transportation by rail
 - Cost competitiveness of rail transportation is already disadvantaged compared to road transportation
 - Increase the number of alternative rail paths during the works to diminish impacts on operation
- **Clearance gauge**
 - Currently limits the train size
 - Increase of clearance gauge allowing to circulate with longer and heavier trains
- **Terminals**
 - Improvement of accessibility to the terminals (development of capillary lines, increase the availability of train paths, etc.)
 - Improve the capacity of terminals and also the capacity to handle dangerous goods
- **Information/communication**
 - Market studies and analysis of hinterland traffic are demanded
- **Business location**
 - Location is selected with respect to each business strategy
 - Relocation is considered only if it increases the competitiveness and gives a business advantage

GERMANY

- German interview partners delivered 6 responses to the survey :
- Railway undertakings:
 - DB Cargo / Euro Cargo Rail
- Terminal manager:
 - KTL GmbH (2x)
 - DUSS mbH
- Shippers & Forwarders:
 - Rhenus Rail St Ingbert GmbH
 - Kombiverkehr KG

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GERMANY

MAIN CONCERNS

- **Limited network capacity**
 - absence of real dialogue between RUs and IM
 - the low priority of freight traffic
- **Lack of drivers and locomotives**
- **Insufficient coordination between terminals and path schedules**
- **Disturbances from maintenance works**
 - lacking offer of alternative paths
- **Lack of a harmonized European strategy taking into account the needs of rail operators**

EXPECTATIONS

- **Train length**
 - 740m trains would solve some existing problems
- **P400 gauge**
- **Transit time of 7 days max between Germany and Portugal**

CORRIDOR SUM UP

MAIN CONCERNS

Topic	Germany	France	Spain	Portugal
Schedule coordination between Terminals and Paths	●		●	●
Transit time / Speed	●		●	●
Maintenance works	●	●	●	●
Terminal Capacity	●	●		●
Train Length	●	●	●	●
P400 Gauge	●	●		
Path allocation and quality	●	●		
Costs & competitiveness		●	●	●

BUSINESS ORIENTED PROCESSES

- **TCR:**
 - Increase coordination on the cross border section of the Atlantic Corridor and improve visualization of a communication report for the RUs in order to improve the quality of RUs expression of capacity needs.
- **Customer Information:**
 - Increase the value add of CIP with functionality like display ETCS and infrastructure projects

PATH QUALITY

- **Product review:**
 - Improvement of PaP offer and process quality
- **Cross border section ERTMS deployment between Mannheim and Woippy**

MAINTENANCE WORKS MANAGEMENT

- **TCR**
- **Project review**

TRANSIT TIME IMPROVEMENT

- Cross border interoperability:
 - Analysis of existing notices, identification of quick wins in order to decrease international transit time
 - Analysis of the usage IT Tools for the cross border operators (e.g. TIS, TCCCom)
- TPM:
 - Implementation of monthly report extracted from TIS via OBI for all international atlantic corridor traffic with the aim to analyze top delayed trains. connecting the border of the Corridor

COSTS AND COMPETITIVENESS

- Improvement would result from transit time reductions
- And from path quality management

TRAIN LENGTHS

- Increase of train length up to 750 m on the Iberian Peninsula

FREIGHT GAUGE

- Intermodal freight gauge classification between Mannheim/Paris/Madrid/Lisbon

TERMINAL CAPACITIES

- How to avoid being delayed due to capacity limitations?

SCHEDULE COORDINATION BETWEEN TERMINAL AND TRAIN SLOTS

- How to avoid having cargo waiting to be processed at terminals?

COSTS AND COMPETITIVENESS

- Improvement would result from transit time reductions
- And from path quality management

HOW DO YOU EXPECT THE ATLANTIC CORRIDOR TO COMMUNICATE WITH YOU ?

BY EXISTING CHANNELS OF COMMUNICATION

- Atlantic Corridor Website
- Other websites
- News letters
- RAG/TAG Meetings

BY INNOVATIVE MEDIA

- What kind of channel/support of communication would you appreciate to see appear?
- Are there any channels you are familiar with, that the Atlantic Corridor could also use?

WHAT IS NEXT

SURVEY FOLLOW UP

- **Strong interest among the stakeholders**
 - Those who answered were highly interested in the follow up of this survey
- **Opportunity to adapt the questionnaire and dig into the identified main concerns**
- **Needs to enhance contact efficiency with some stakeholders**
 - Some companies did not fill the questionnaire, for various reasons
 - Possibility to involve RAG&TAG Speakers in the survey process
- **Frequency of the survey: once a year**

Thank you for your attention