

marketmind



Marketing Evolution

fresh thinking for powerful marketing

We increase the impact of marketing measures and enhance our customers' brand value. In order to achieve this goal we combine market research and consulting to create a tailor-made solution.



marketmind



RFC User Satisfaction Survey 2016

Report for RFC 4



Co-financed by the European Union
Connecting Europe Facility

November 2016

| | | |
|---|---------------------------|----|
| 1 | Study Design | 4 |
| 2 | Satisfaction with the RFC | 6 |
| 3 | Sample Description | 39 |
| 4 | Non/potential users | 42 |
| 5 | Summary | 44 |



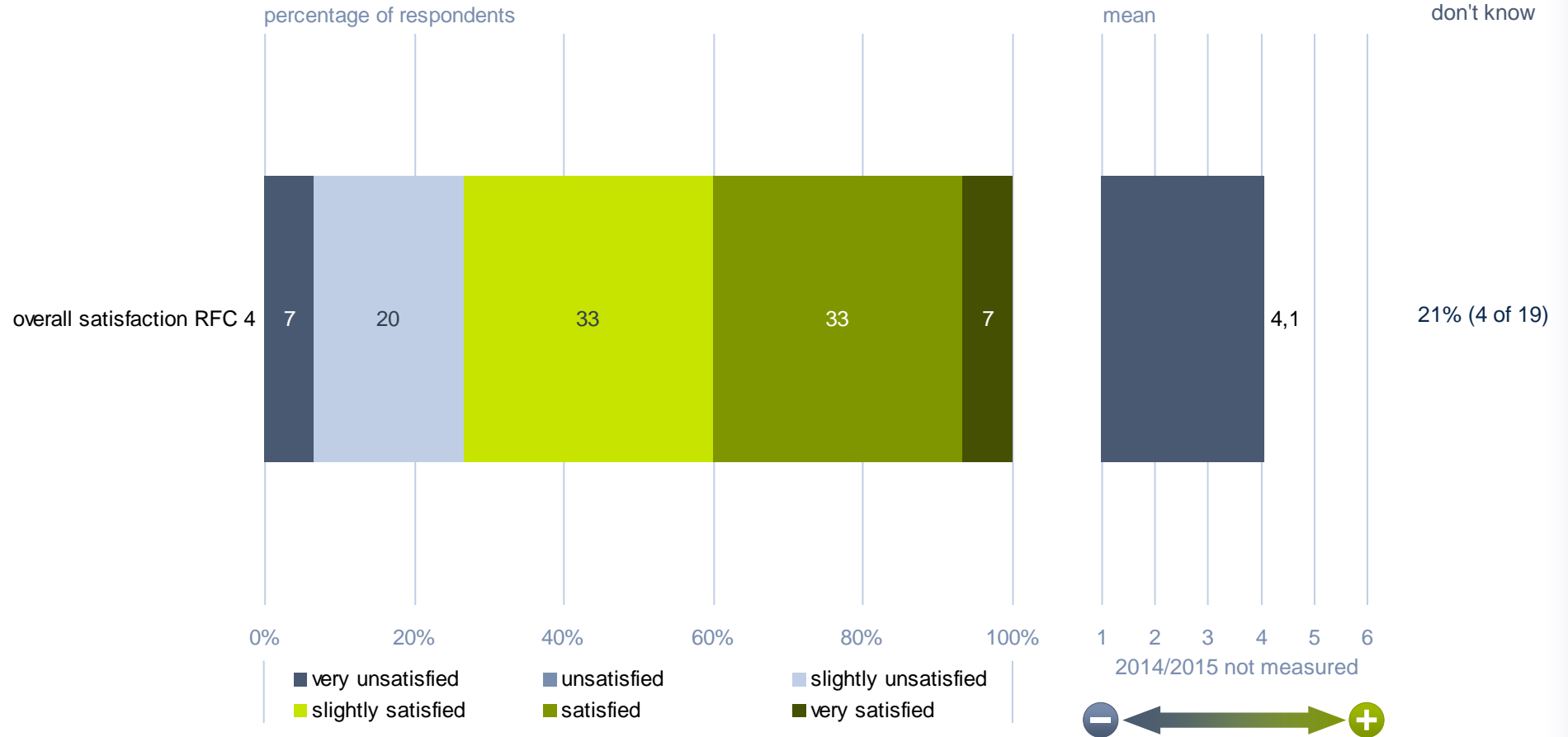
1 Study Design



- ▶ **21 respondents**
 - 19 RFC4 users / 2 non-users
 - 20 full interviews / 1 partial interviews
 - 19 nominated by RFC4 / 2 nominated by other RFCs
 - 5 agreed to forward name
 - 3 used topic-forward
- ▶ Computer Aided Web Interviews (CAWI)
- ▶ Contacts (e-mail address) delivered by RFCs
- ▶ 80 e-mail invitations sent
- ▶ Field Phase: 13 September to 17 October 2016



2 Satisfaction with the RFC

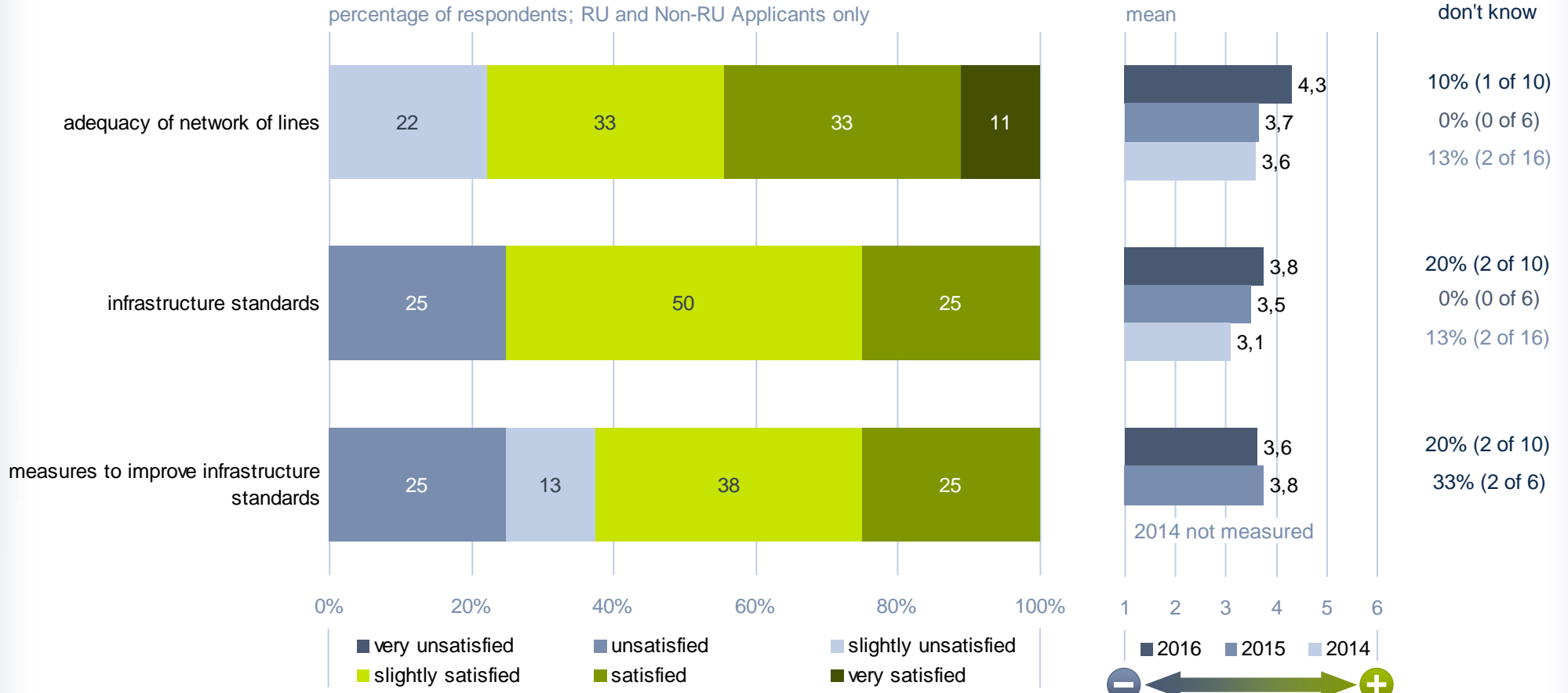


"Overall, how satisfied are you in general as a user of the RFC(s)?"

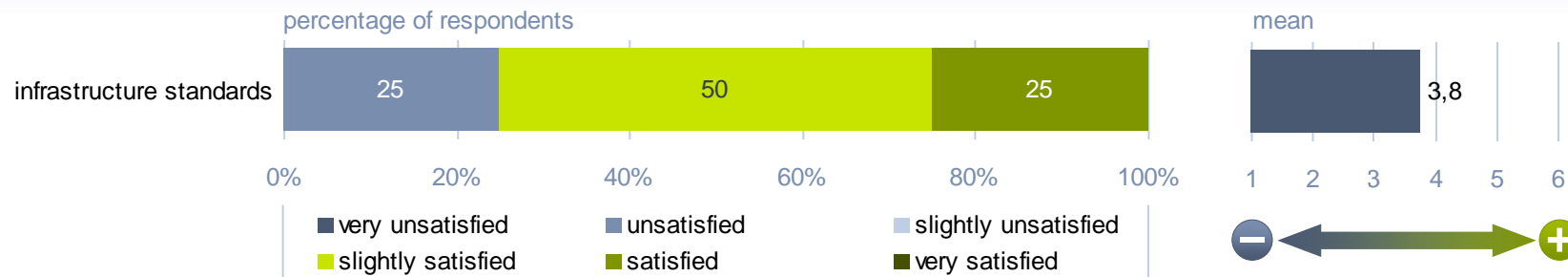
n = 19

cooperation between IM and RU to establish international paths from an origin to a destination, with or without the Corridor
for PaPs efficiency improvement, a better matching between terminals freight and rail channel slots is needed
the paths, sometimes, do not consider delivery time service in terminals or the time required for the treatment of the train
one overall TAG Meeting for all corridors; this would ensure a coherent treatment of topics
ministries should take over more responsibility to solve problems they are in charge like longer trains (financing of longer tracks)
a cross-corridor coordination and consultation process together with RU should be set up
an official body (e.g. Executive Broad) should approve that process and eventually establish a regularly reporting
development of ETA on the whole corridor

"If there are any other opinions/suggestions/expectations (either concerning the state of play or the future development of the RFC) that you would like to share with us, please describe them below."



"To what extent are you satisfied with the result/quality of the coordination of planned temporary capacity restrictions (works and possessions) on the corridor? || ... with the quality of the information given in the list of planned temporary capacity restrictions that will affect the availability of the lines assigned to the corridor? || ... with the level of detail in the contents of the list? || How do you feel about the way your opinion is taken into account in the relevant processes?"



very unsatisfied/unsatisfied

the short length of the trains > 500m

RFC should publish a ETCS deployment plan

non-electrified tracks after the Portuguese border in Spanish territory

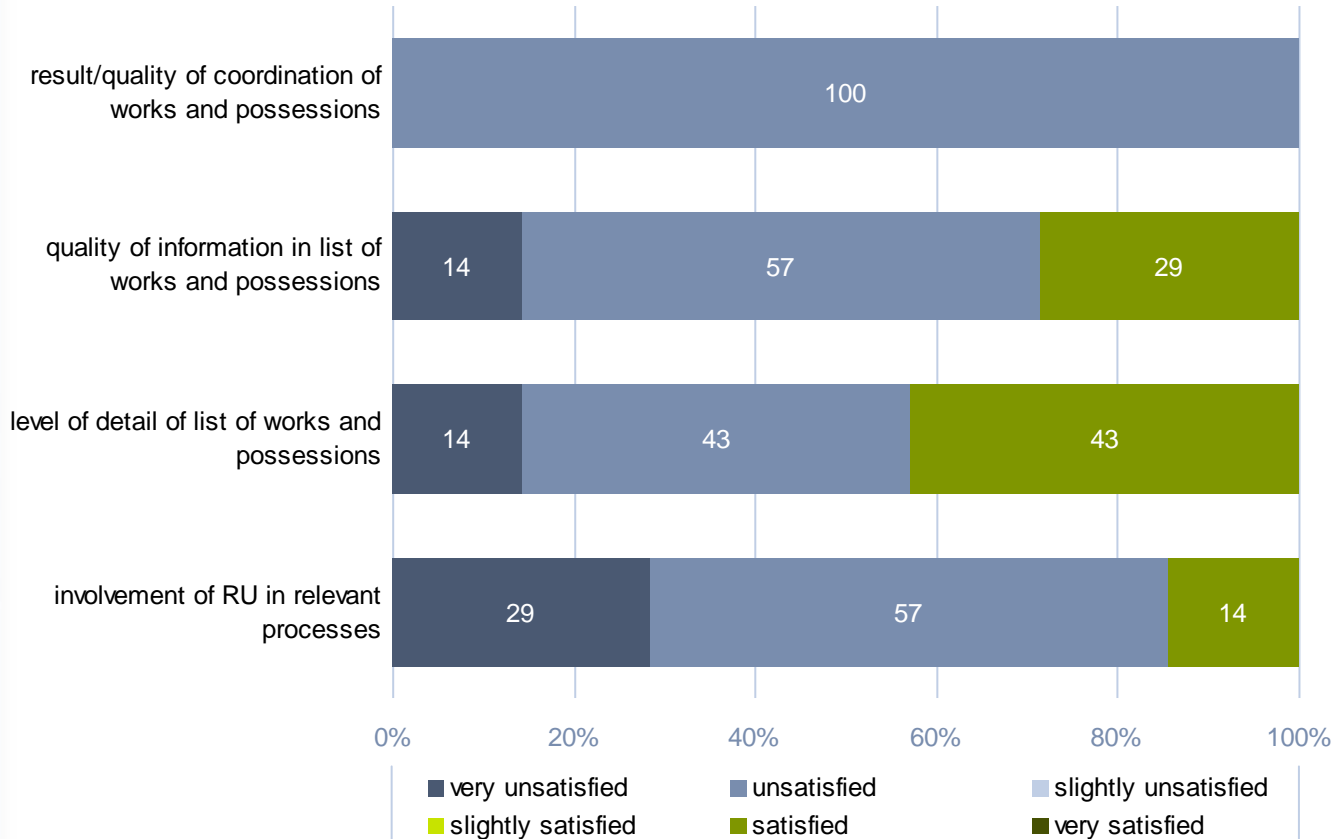
RFC should guarantee availability of a diversionary route while main route is blocked by engineering works

slightly unsatisfied or better

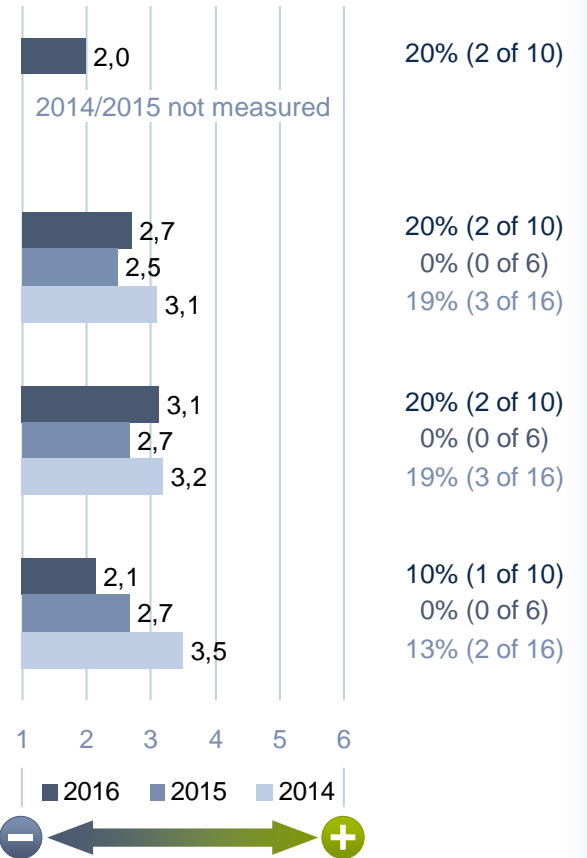
request for a higher capacity of import (ATE) - rise up of gabarit

"If you are 'unsatisfied' or 'very unsatisfied', please specify the main reasons?"

percentage of respondents; RU and Non-RU Applicants only

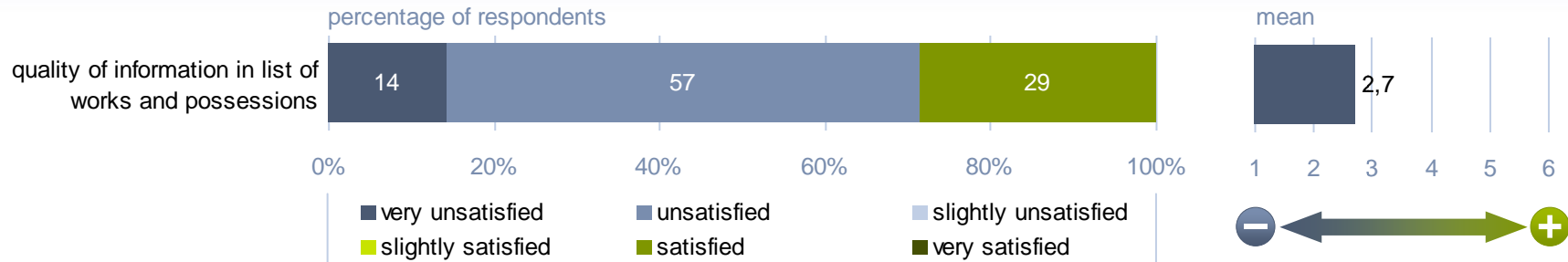


mean



"To what extent are you satisfied with the result/quality of the coordination of planned temporary capacity restrictions (works and possessions) on the corridor? || ... with the quality of the information given in the list of planned temporary capacity restrictions that will affect the availability of the lines assigned to the corridor? || ... with the level of detail in the contents of the list? || How do you feel about the way your opinion is taken into account in the relevant processes?"

Quality of information in list of works and possessions || criticism/suggestions || **marketmind** open question



very unsatisfied/unsatisfied

no coordination today between IM on capacity restrictions, the coordination is done by the RUs

no information is received about the state of the infrastructure and the works planned

RFC should publish a comprehensive TCR information to RUs after RFC have done the coordination work with neighboring IMs

TCR information should be updated regularly during the year

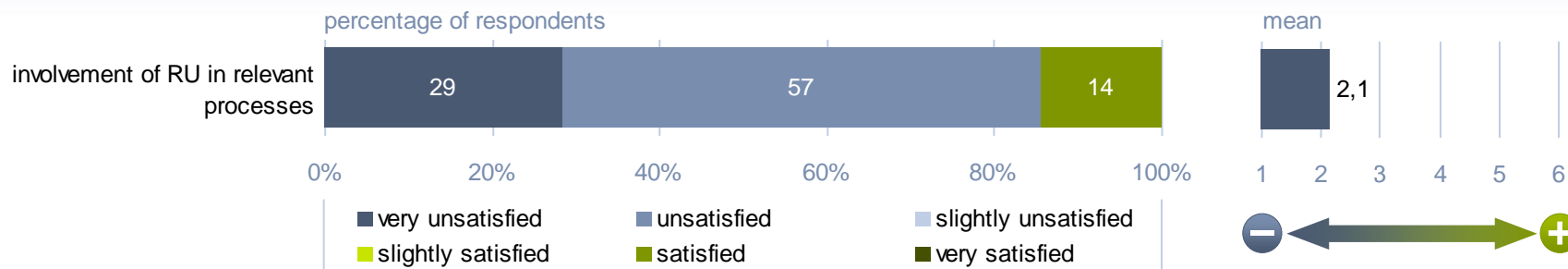
alternative routing and paths should be offered to RUs in case of TCR

publication lists are very complex and detailed and barely harmonised between different IM

lists are not sufficiently updated; partly, we receive information from the IM which is different from what has published

"If you are 'unsatisfied' or 'very unsatisfied', please specify the main reasons?"

Involvement of RU in relevant processes || criticism/suggestions || open question



very unsatisfied/unsatisfied

no opinion taken from the RUs

the process agreed by RNE is not respected; we virtually cannot identify any process of coordination

There is no coordination of the maintenance periods between the Spanish IM and the Portuguese IM. The definition of the possession periods for infrastructure works is presently established individually by each IM.

no information is received

RFC shall communicate to RUs the specific impact on their allocated paths on the corridor

the data should be updated during the year

alternative offer shall be offered from end to end in coordination with IMs

"If you are 'unsatisfied' or 'very unsatisfied', please specify the main reasons?"

each IM must provide its works plan at the same time

prepare a graphic representation of the possession periods throughout the European Rail Network including the Atlantic Corridor

inform the RU about the works on the whole corridor (before the request of PAP needs)

Inform the RU about the works on the whole corridor (before the order)

organize bi-lateral workshops with RUs to anticipate the alternative solutions during the TCR

to receive all the information together of IMs

RUs should be invited to coordination meetings of the IMs at a moment where the planning of restrictions can still be influenced

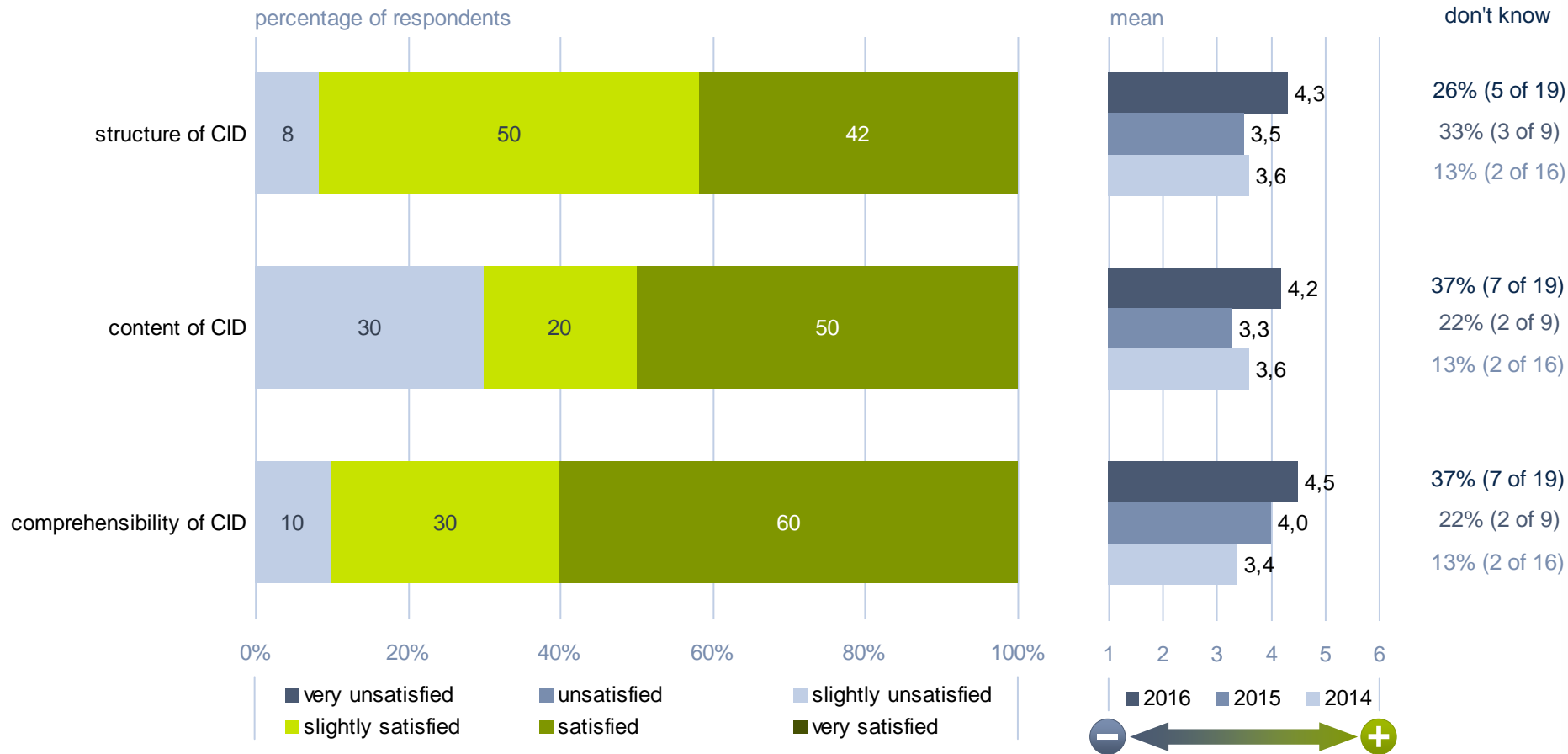
Periodical meetings between IM in order to define the possession periods should be organized and a subsequent Action Plan with the concerning corrective measurements should be published

The IMs should show the already known construction work along the corridor with particular time frames: If there are contradictions RUs should point them out and ask IMs to apply corridor regulation (913/2010)

propose alternatives in case of impacting works

follow and control the impact of the works from the adaptation to the entry into service of the path

"Do you have any ideas for improvement of the coordination of planned temporary capacity restrictions (works and possessions)?"



"To what extent are you satisfied with the structure of the CID for the 2017 timetable year? Can you easily find the information you want? Is the information organized in a logical way? || ... with the contents of the CID? Do the contents match your business needs? Is the level of detail sufficient? || ... with the comprehensibility of the CID? Is the wording clear and user-friendly? Are there enough graphical elements (where clear illustration is required)? Is the CID layout/design attractive?"

real capacity of border terminals

we do not know the operative capacity of terminals

involve customers

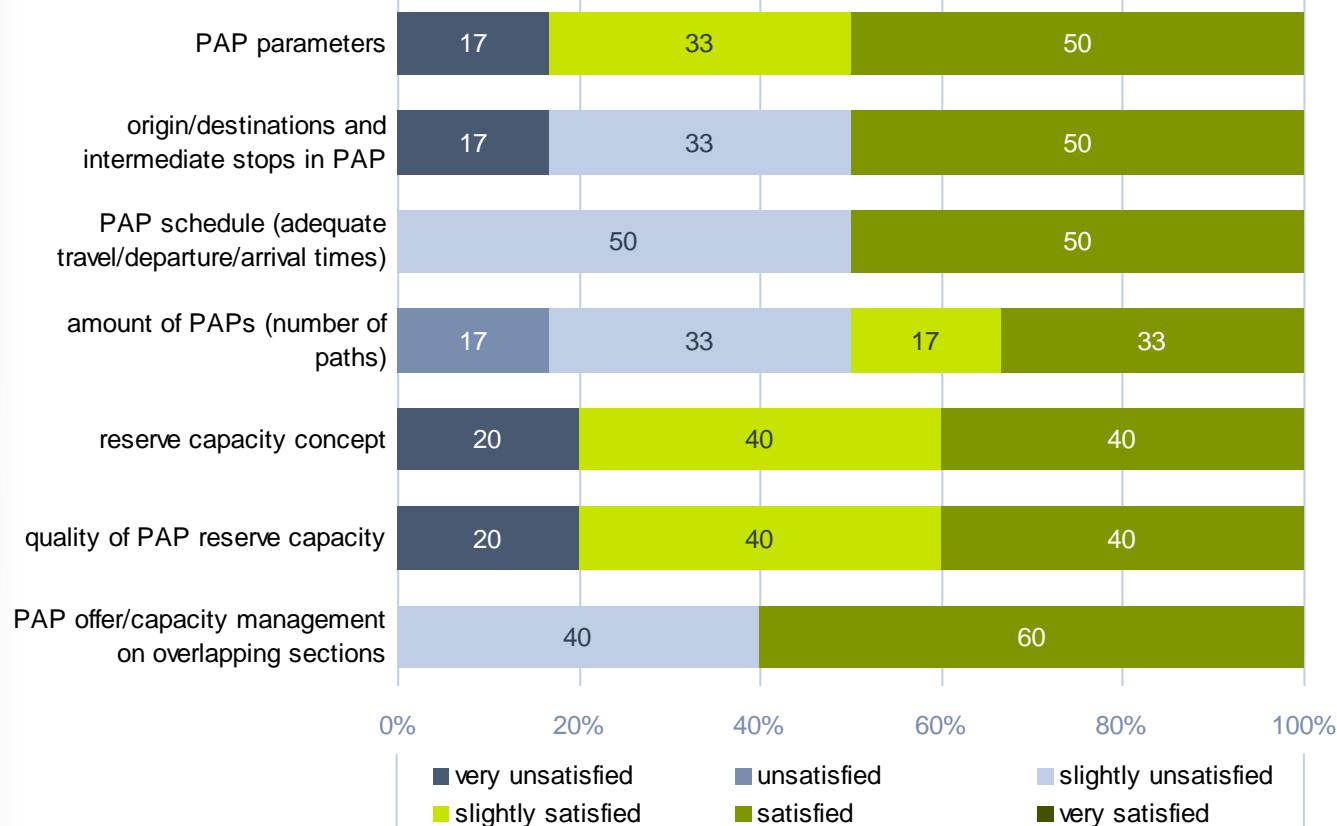
optimize the information about construction works

RUs check the offer in PCS not so much in CID. So a lot of care should be put in PCS data reliability and completeness

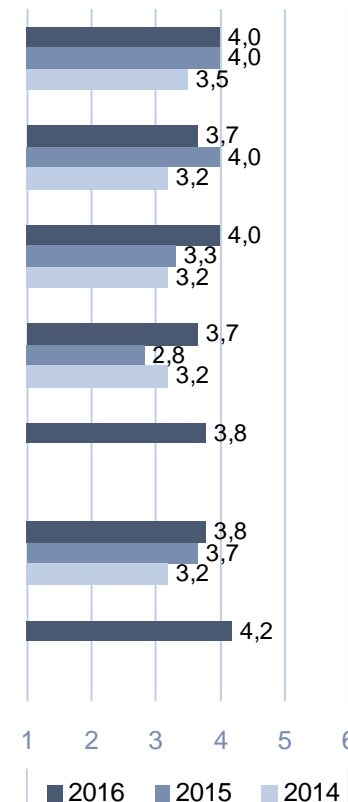
disposition of the time windows of transfer operations

"Do you have any ideas for improvement of the CID?"

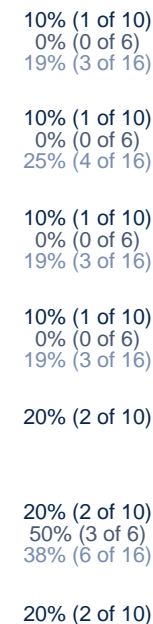
percentage of respondents; RU and Non-RU Applicants only



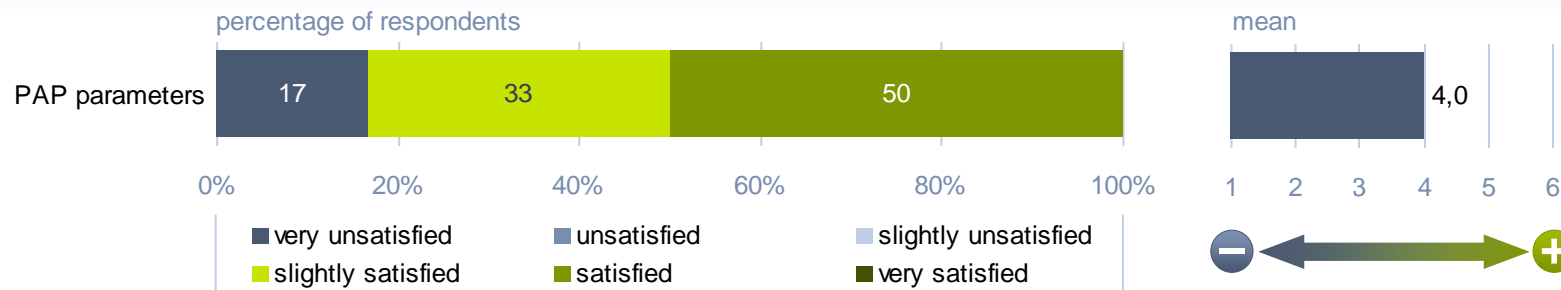
mean



don't know



"To what extent are you satisfied with the Pre-arranged Path (PaP) parameters such as length, weight, etc.? || ... with the origins/destinations and intermediate stops? || ... with the PaP schedule? || ... with the amount of the PaPs? Is there a sufficient number of PaPs? || ... with the RC concept? || ... with the quality of Reserve Capacity? || PaP offer and the capacity management process on overlapping corridor sections?"

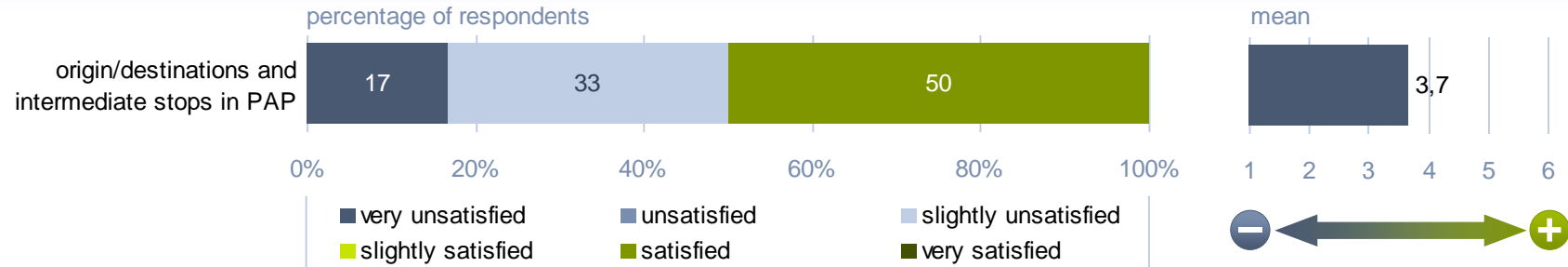


very unsatisfied/unsatisfied

RUs are suffering from not well harmonized final offers: border times are not always harmonized, PAP allocation are not confirmed in PCS TT for all dossiers (technical issue), timetable differ in PCS Vs national systems, missing running days ...

RUs are suffering also from offer/times/parameter not matching to request or inconsistent and also from inconsistent doubled timetables in PCS

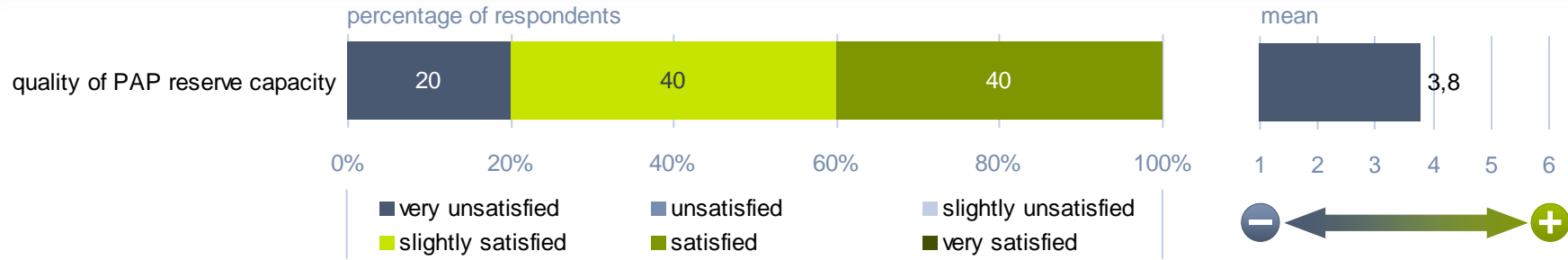
"If you are 'unsatisfied' or 'very unsatisfied', please specify the main reasons?"



very unsatisfied/unsatisfied

need more PAP offer from Mannheim direction Spain

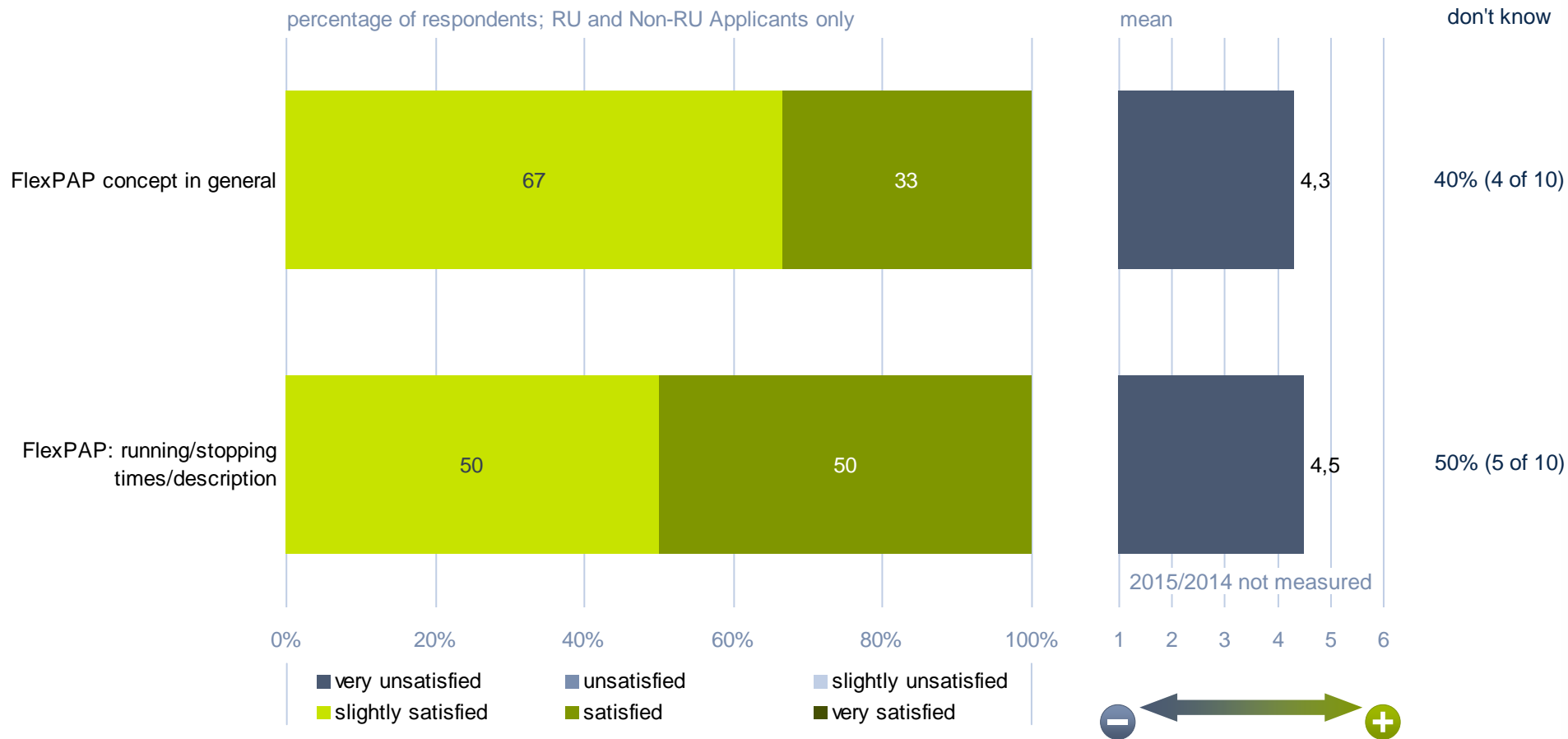
"If you are 'unsatisfied' or 'very unsatisfied', please specify the main reasons?"



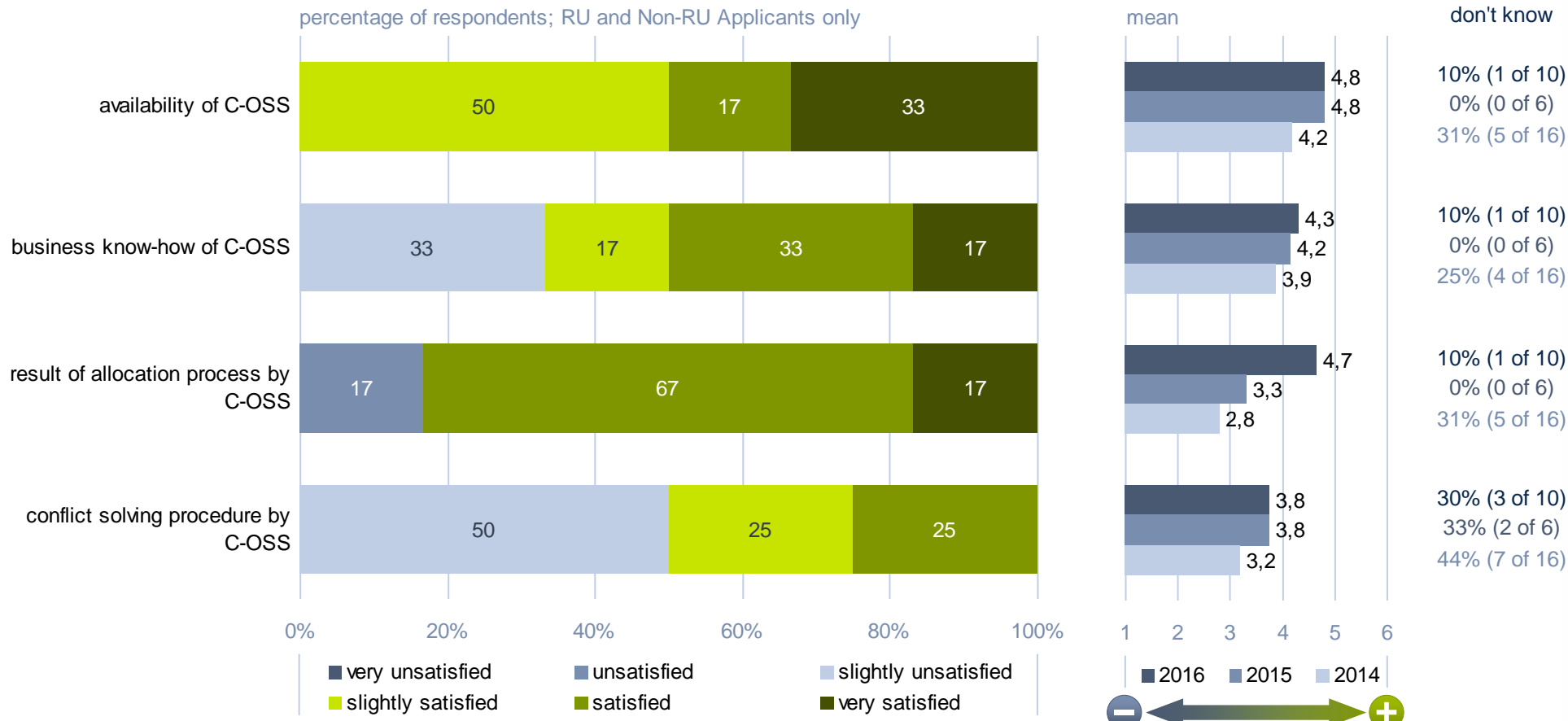
very unsatisfied/unsatisfied

it is hard to use and to get reliable information in the current set-up

"If you are 'unsatisfied' or 'very unsatisfied', please specify the main reasons?"



"To what extent are you satisfied with the flexible approach to arrival/departure times and the possibility to shift intermediate stops (FlexPAP concept)? || ... with the FlexPAP concerning running/stopping times and description? Is the indicated range of standard running times / maximum stopping times useful and is the description of the FlexPAP concept in CID 2017 sufficient?"



"How satisfied are you with the availability of the Corridor One-Stop Shop (C-OSS)? (Is the reaction time of the C-OSS adequate?) || How satisfied are you with the business know-how of the C-OSS? || How satisfied are you with the result of the allocation process for the 2017 timetable year? (Please consider especially the pre-allocation by the C-OSS, and the delivery of the draft and final timetable offers.) || How satisfied are you with the conflict-solving procedure?"

agreement between IMs to request international paths from point to point

create new PAP based on RU needs

PAP offer has to be completely evaluated by RFC because 2017 quality is going down

reduce the time required for PaP planning (less anticipation)

guarantee a PAP until the day of traffic and not only during the order

allow for a PaP update during the yearly working timetable, in order to better adequate the offer to the demand

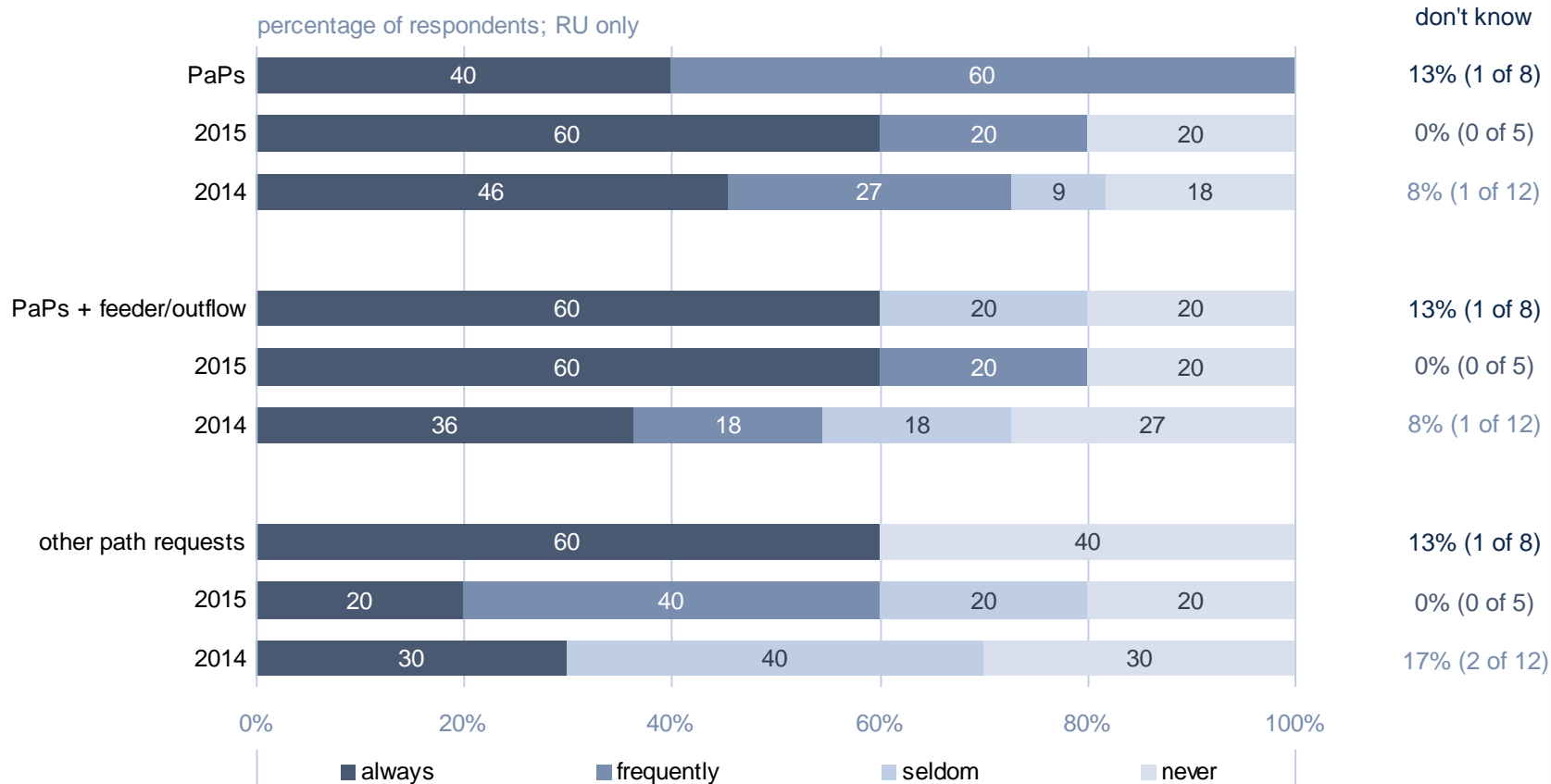
use only a tool to request LPR and ad hoc and make it extensive to all corridor's paths

the paths requested previous years should be maintained and renewed to RUs

take into account the impact of works on the PAP in advance

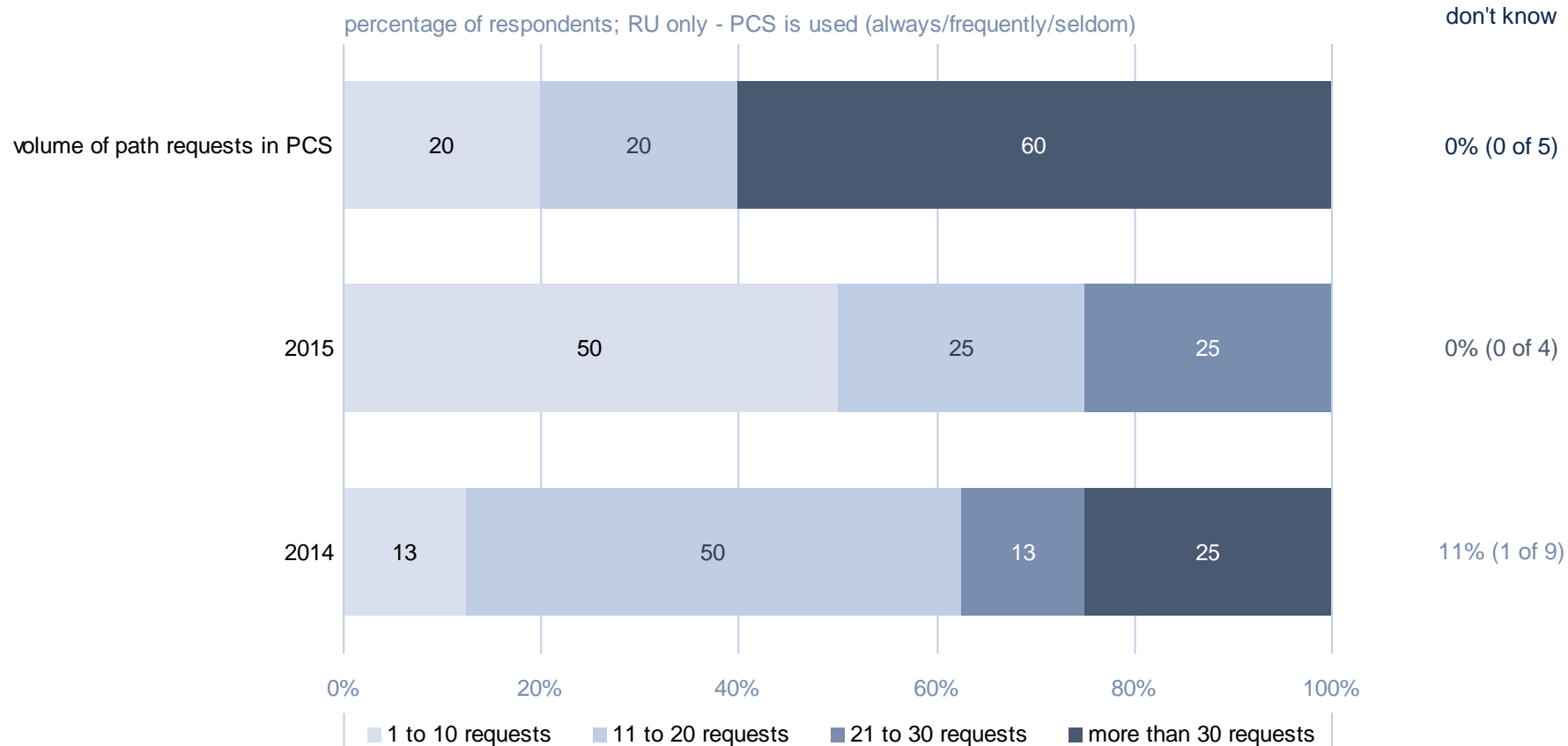
harmonize the requests in adaptation

"Do you have any ideas for improvement to the PaPs and C-OSS?"



"How often does your company use the PCS booking tool for international path requests?"

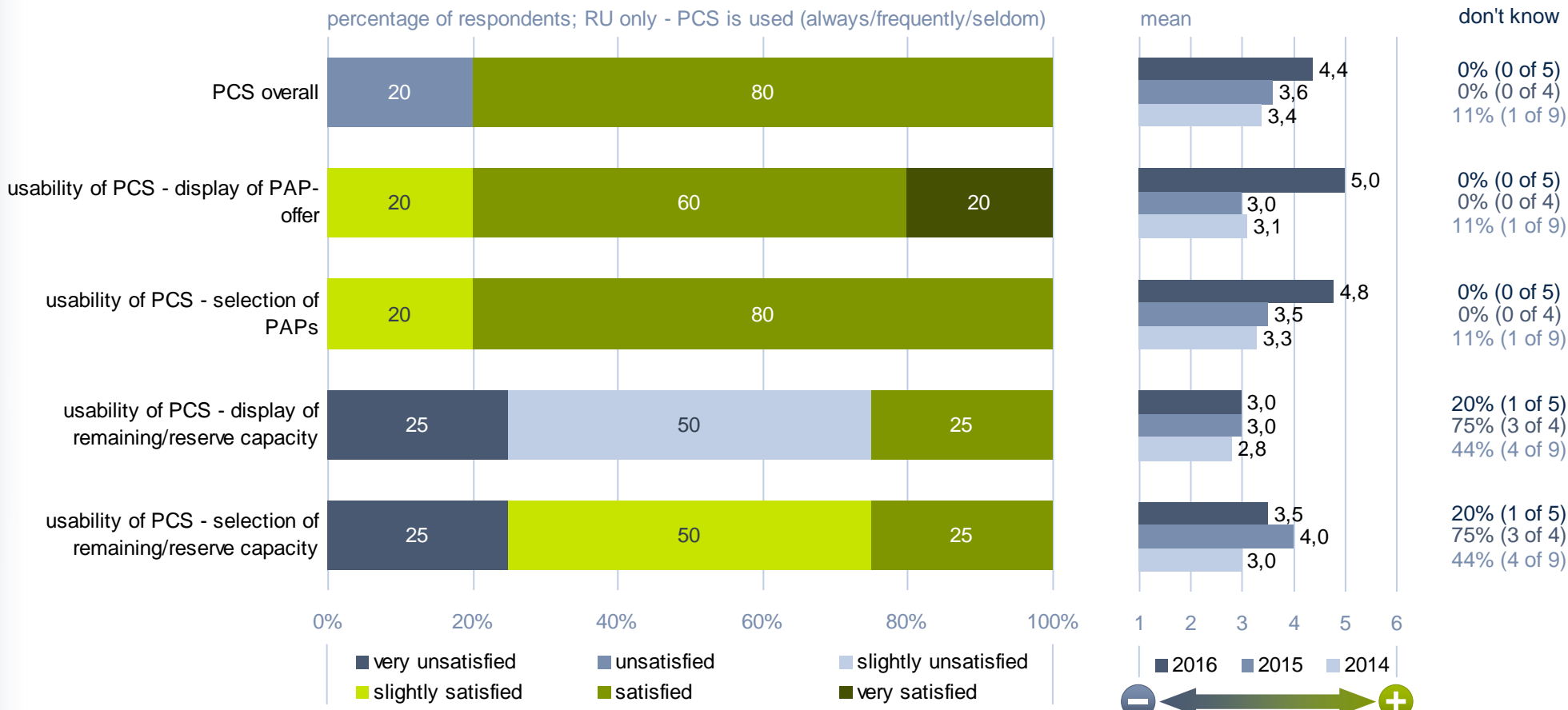
n = 8; 5; 12



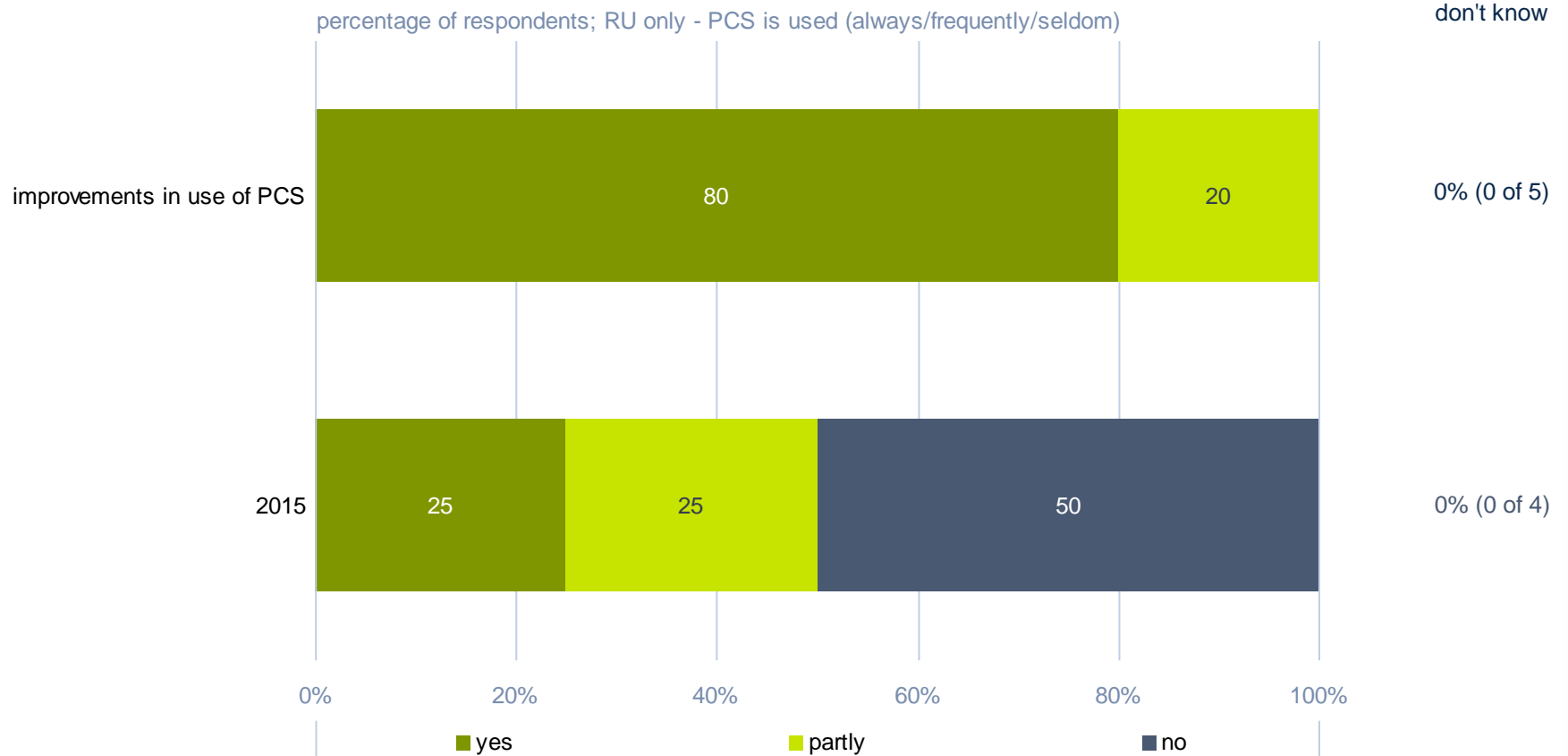
"What is the volume of path requests (dossiers) you placed in PCS for the 2017 timetable year?"

n = 5; 4; 9

Satisfaction with Path Coordination System (PCS)



"How satisfied are you all in all with PCS as a booking tool for international path requests? Does it match your needs? || ... with the usability of PCS concerning the display of the PaP-offer? || ... concerning the selection of required PaPs? || ... concerning the display of remaining / reserve capacity (late and ad-hoc path requests)? || ... with the usability of PCS concerning the handling of required remaining / reserve capacity (late and ad-hoc path requests)?"



"Have you perceived significant improvements in the use of PCS compared to the previous year?"

n = 5; 4

not only for regular trains but also to LPR and ad hoc

not only for annual regular trains but also to LPR and ad hoc

PCS data should be the same in the national systems; it is possible that PCS process and tool need to be amended to allow IMs to make the necessary changes

solve the time zone limitation between countries, in particular between Portugal and Spain

interface between IMs IT tool and PCS should be active and working in both direction

LPR and ad hoc paths are not authorized by all the IMs

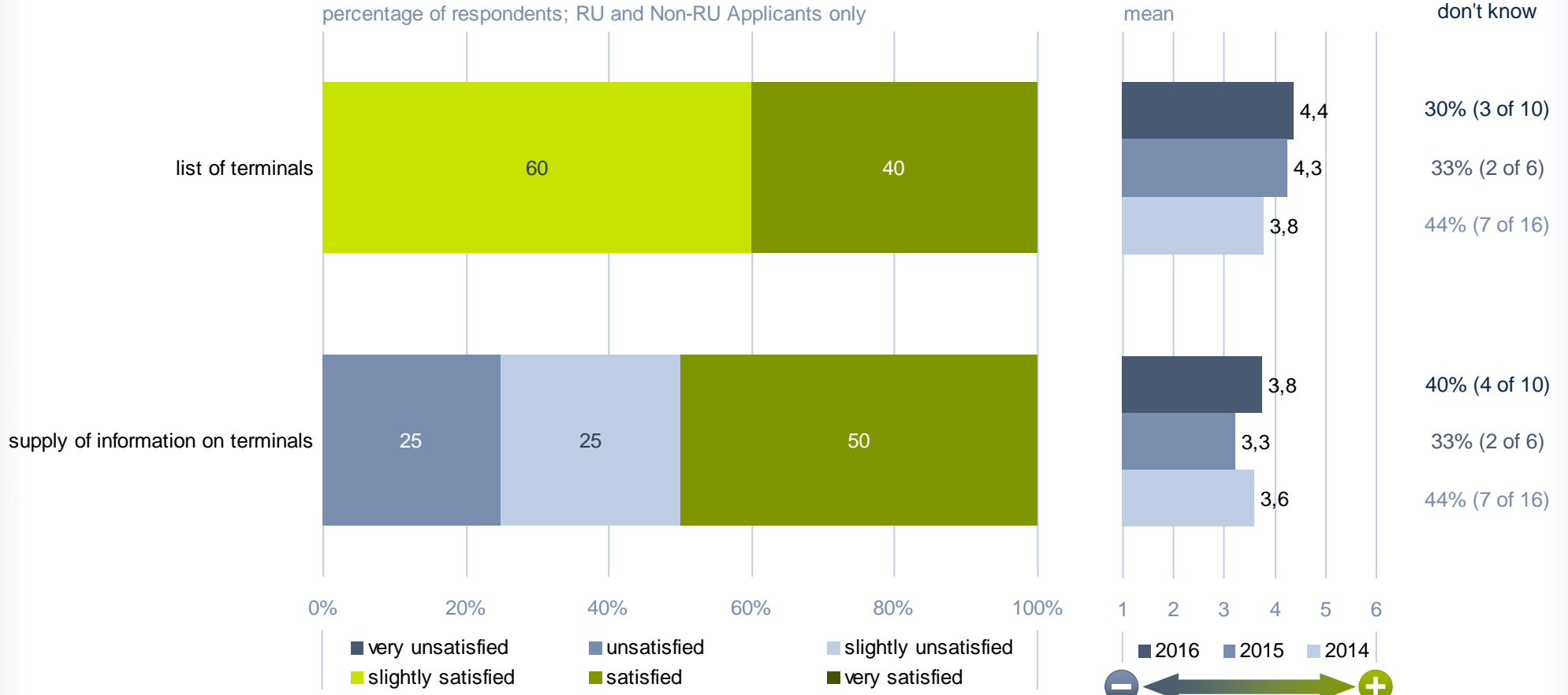
simplify the possibility for a PaP to have one origin and several destinations or the other way around, several origins and one single destination

it is not normal that it takes hours to RUS to check the final offer because they have to compare national system of all countries and PCS data like it happened this year

not admit the use of the national tool by the IMs participating

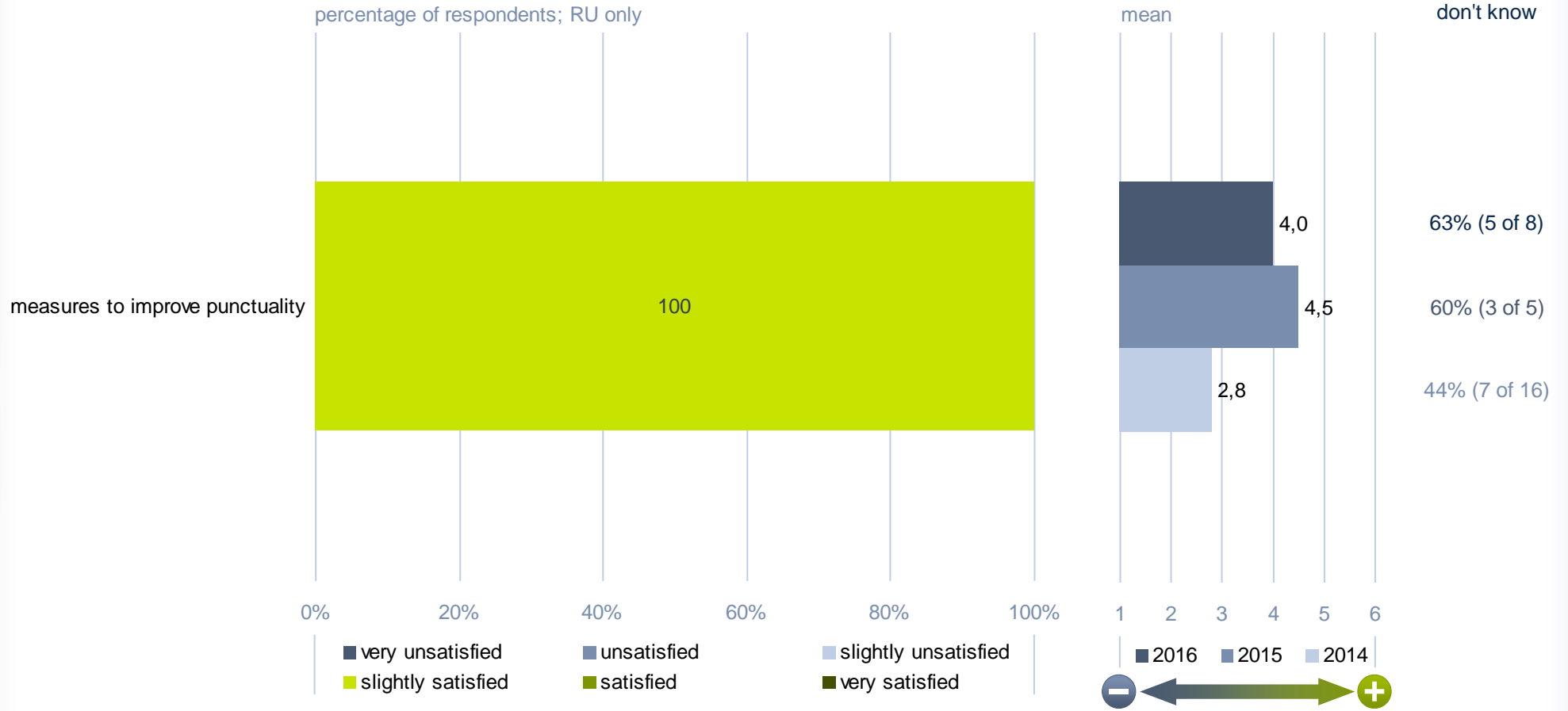
not use National System

a unique international path, belonging or not to the Corridor



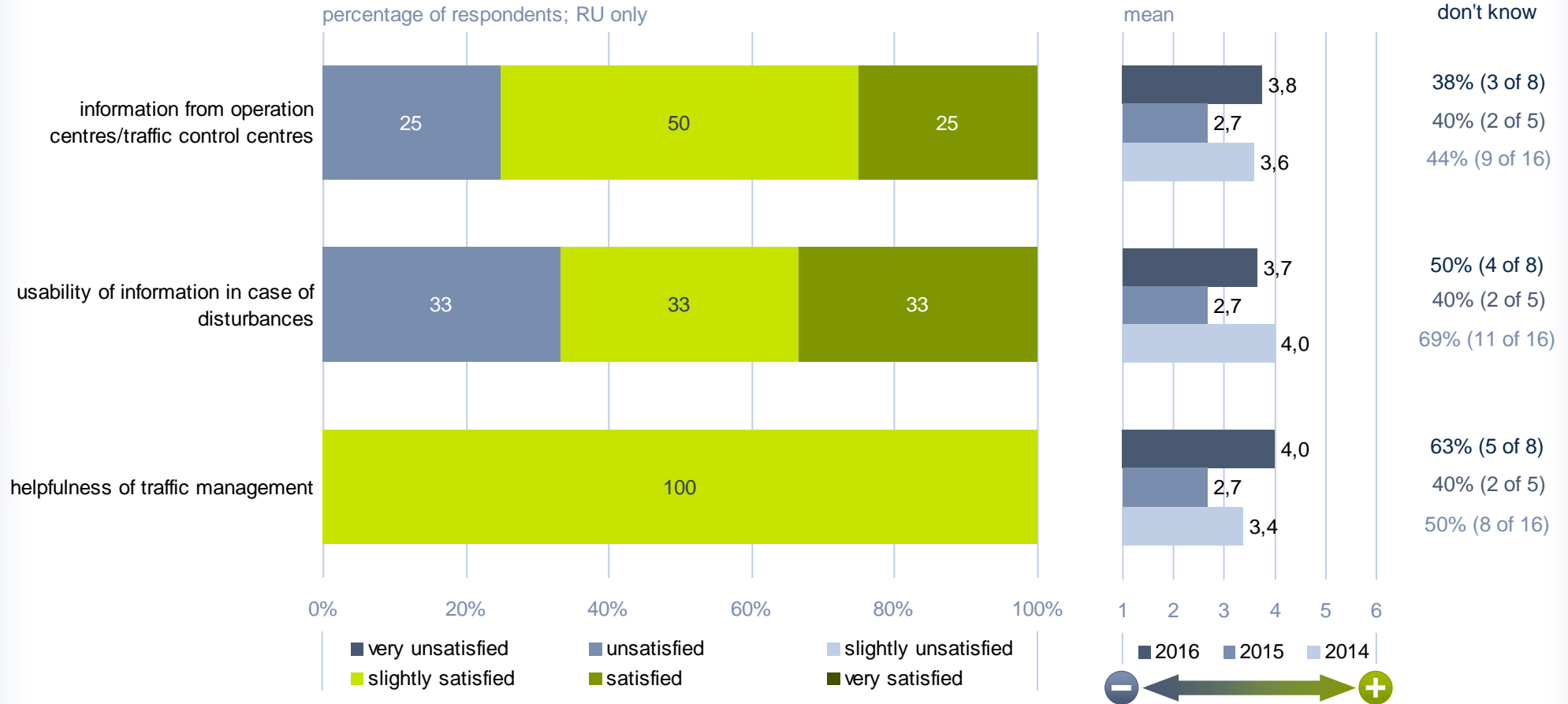
"To what extent are you satisfied with the list of terminals along the RFC that are provided by the RFC? Are all relevant terminals included in the CID 2017? || To what extent are you satisfied with the supply of information on terminals? Is the RFC supplying all relevant information on Terminals (either contained inside the CID 2017 or other sources)?"

n = 10; 6; 16



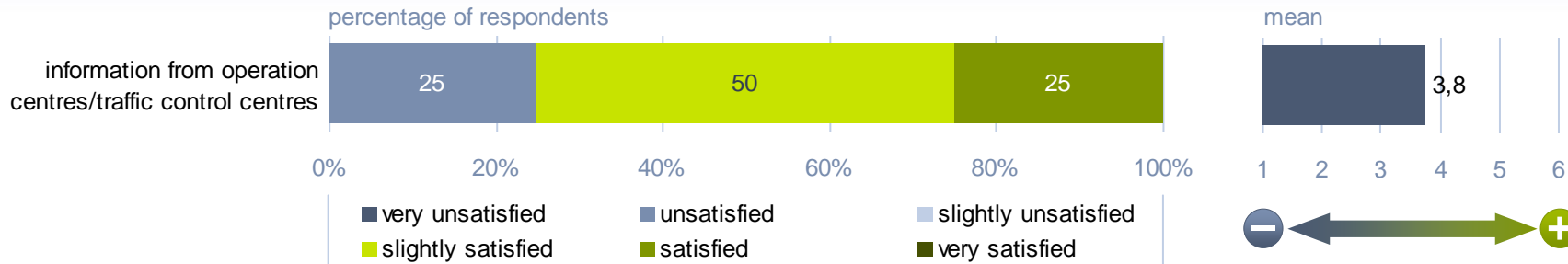
"How satisfied are you with the efficiency of measures taken in order to improve punctuality?"

n = 8; 5; 16



"How satisfied are you with the information you get from the different operation centres / traffic control centres of the IMs on the corridor while operating trains? || ... with the usability of the information you get from the operation centres / traffic control centres of the IMs on the corridor in case of disturbances? || How helpful is the Infrastructure Managers' (IMs') traffic management as regards running your trains with a high service quality?"

information from operation centres/traffic control centres || criticism/suggestions || open question



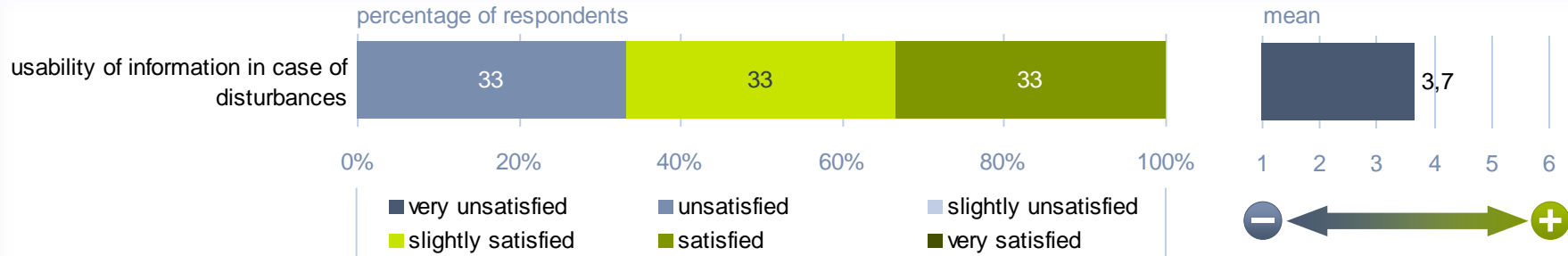
very unsatisfied/unsatisfied

the information is received too late and not operational

the measures are not transparent and not shared with the RUs

"If you are 'unsatisfied' or 'very unsatisfied', please specify the main reasons?"

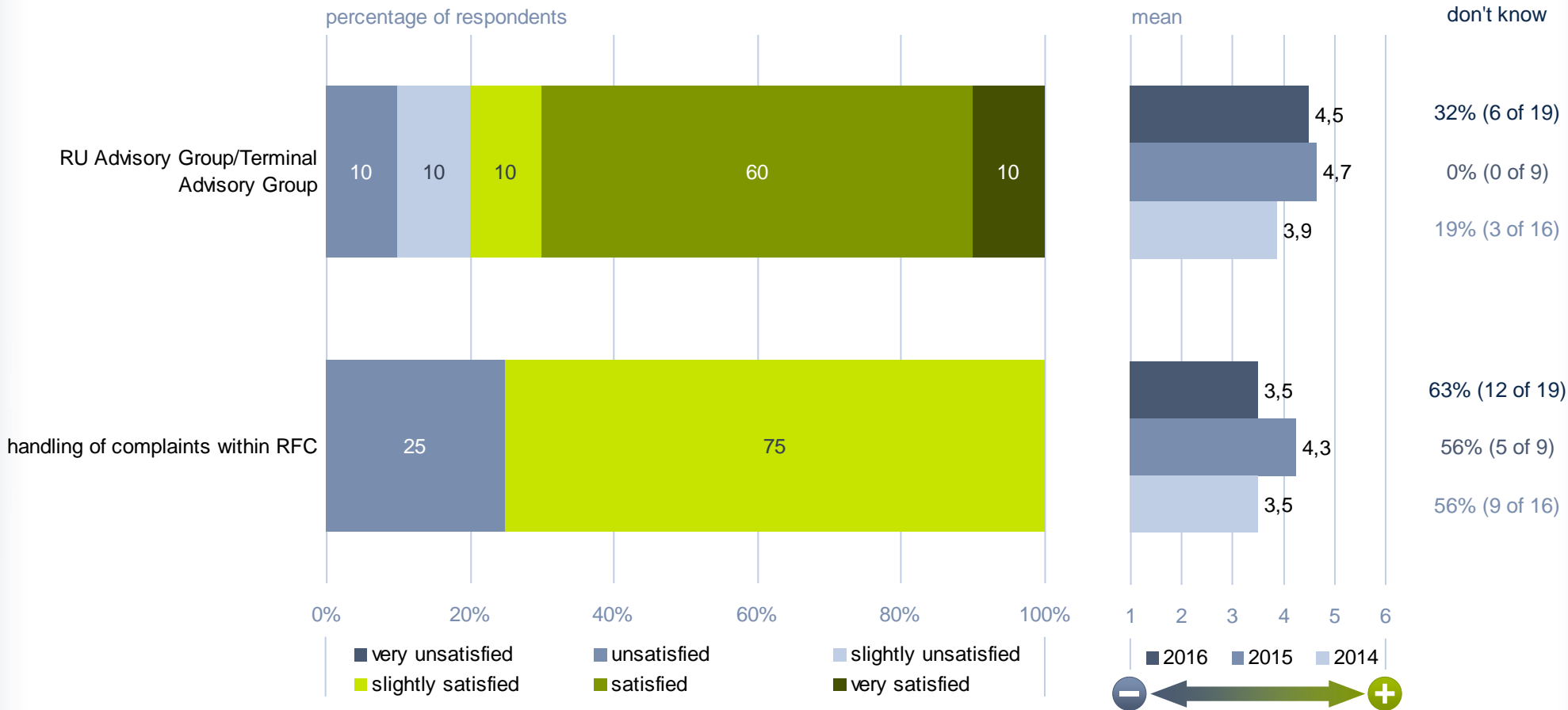
usability of information in case of disturbances || criticism/suggestions || open question



very unsatisfied/unsatisfied

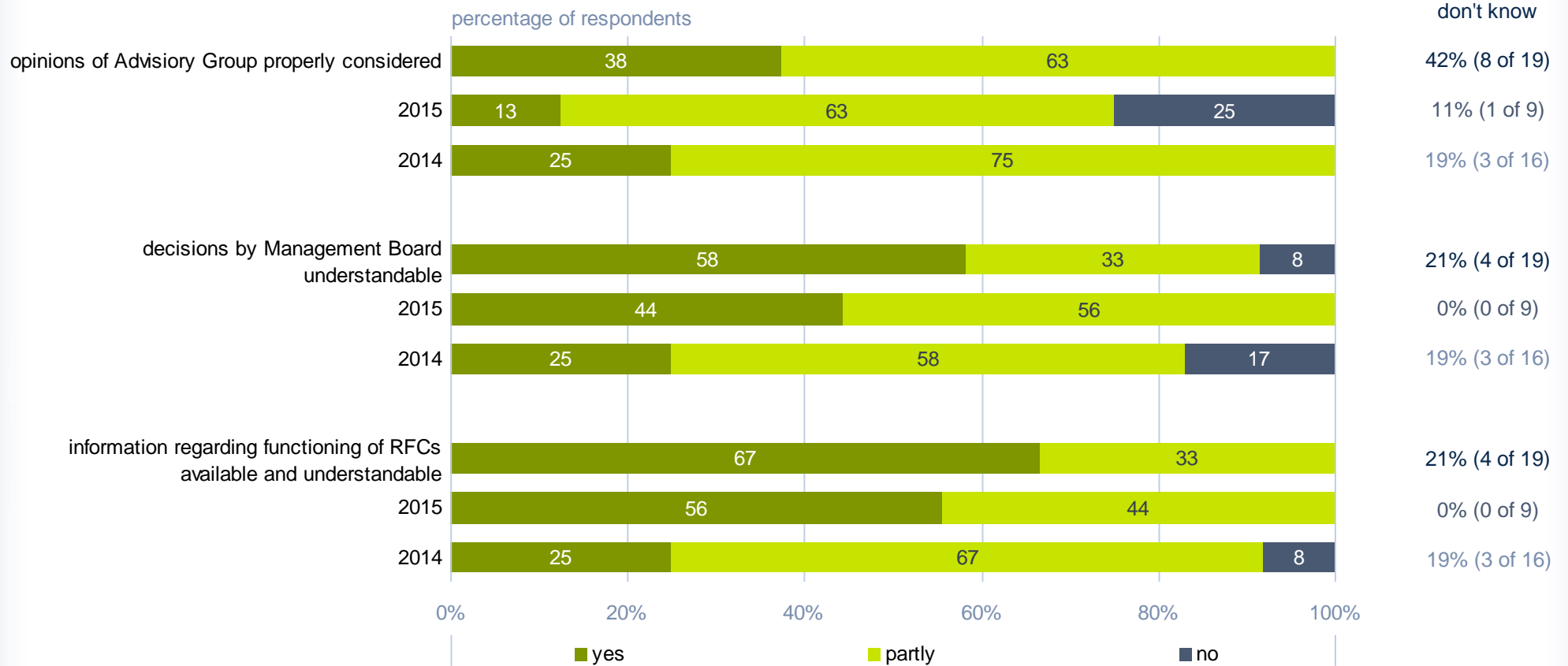
this information is not useful in the present format.

"If you are 'unsatisfied' or 'very unsatisfied', please specify the main reasons?"



"How satisfied are you with the RU Advisory Group/Terminal Advisory Group (RAG/TAG) meetings. Is your attendance beneficial and useful for your company?
 || How satisfied are you with the procedure for handling complaints within the RFC? Please note that this question only refers to complaints – if any – handled by the RFC, it does not refer to complaints handled by the Regulatory Body."

Satisfaction with Co-operation with the RFC Management Board (2)



"Do you consider that the opinion of the Advisory Group has been properly taken into account by the RFC Management Board? || Are decisions taken by the RFC Management Board (that concern your business) understandable for you? || Is information regarding the functioning of the RFC easily available and understandable for you?"

communication about the RFC decisions and implementation of investments for the market players (potential users of the corridor) should be done in clearer way. What's in it for the shippers, for the logistical players, for the road haulers etc...

participation of RUs in the implantation of Corridor paths

possibility to have an agenda point in the executive board meeting

the complaint process could be improved

ERTMS developments to be aligned along the corridor

Establish preliminary meetings between RUs and IMs from each country

coordination of works in France and proposal of alternative rail paths to be improved

the priority of requests must come from the origins and/or destinations, not from transits

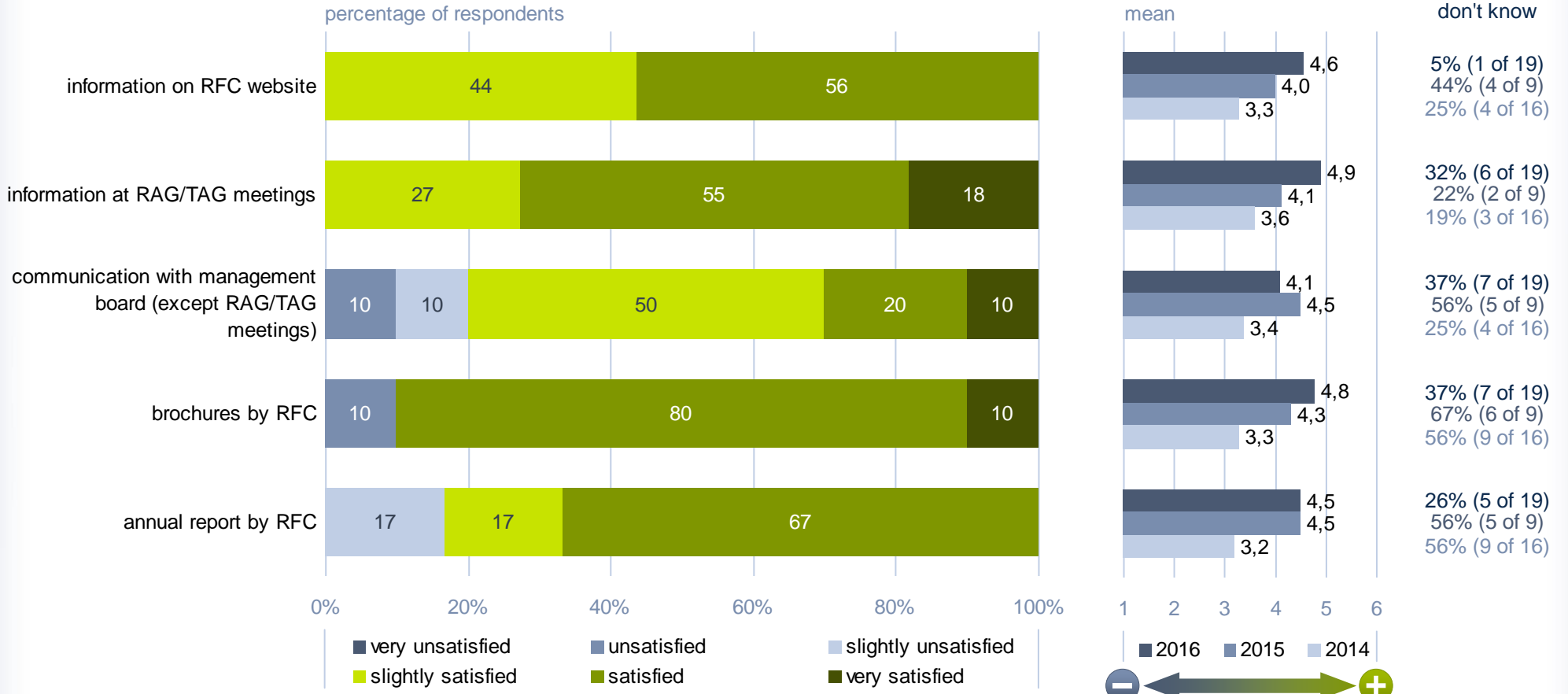
a harmonization challenge (operational processes & technical aspects) and a legal challenge (removal of redundant national rules)

the transit schedule must be adapted and not the reverse

the cost challenge is not explicitly addressed in the regulation but it should be the basic idea of the RFC concept

"Do you have any ideas for improving your involvement in the RFCs` activities?"

Satisfaction with Overall RFC Communication



"To which extent are you satisfied with the information provided by RFC's website? || To which extent are you satisfied with the information provided by the RAG/TAG Meetings? || To which extent are you satisfied with the communication with the Management Board of the RFC other than at the RAG/TAG meetings? || To which extent are you satisfied with the brochures/annual report published by the RFC? "

a harmonization challenge (operational processes & technical aspects) and a legal challenge (removal of redundant national rules)

better information regarding effective freight terminals services

it is especially desirable for operative questions in terminals

coordinated information for joint work

RUs need more support on their own specific issues from the RFC during the year

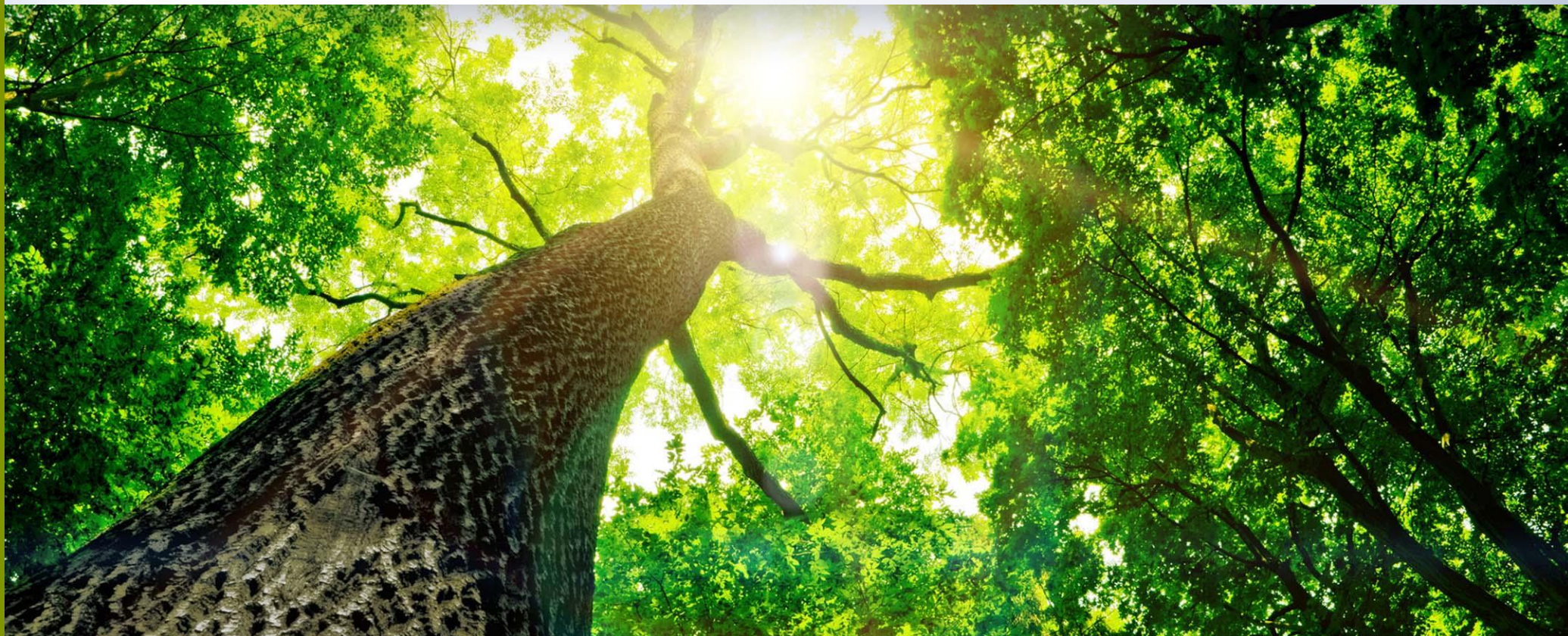
we don't know figures - volumes moved per market comparing with the first forecast

RUs need more support on their own specific issues from the RFC during the FTE process

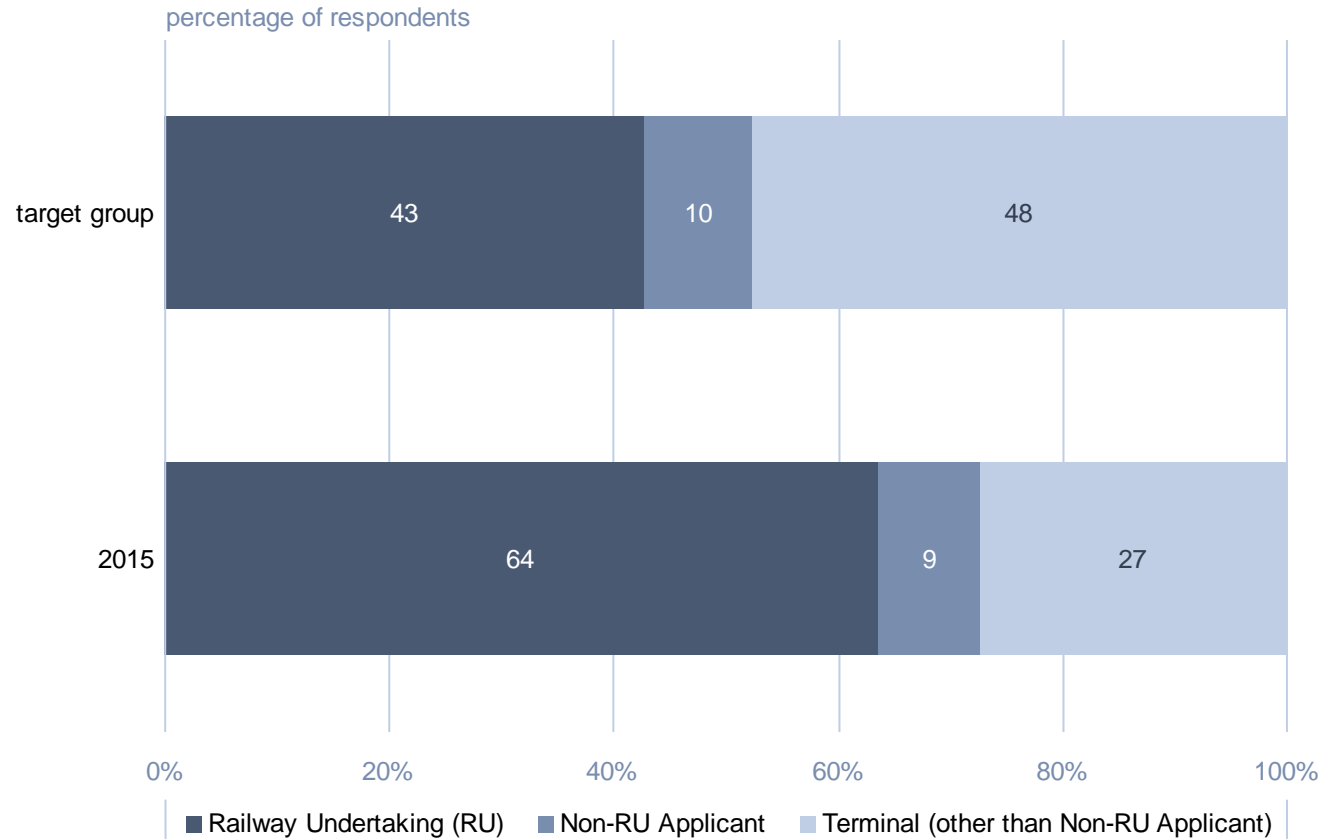
the cost challenge is not explicitly addressed in the regulation but it should be the basic idea of the RFC concept

stronger involvement of Transport Ministries /Member States would help in overcoming national barriers to harmonization

"On which subjects would you like the RFC to communicate more?"

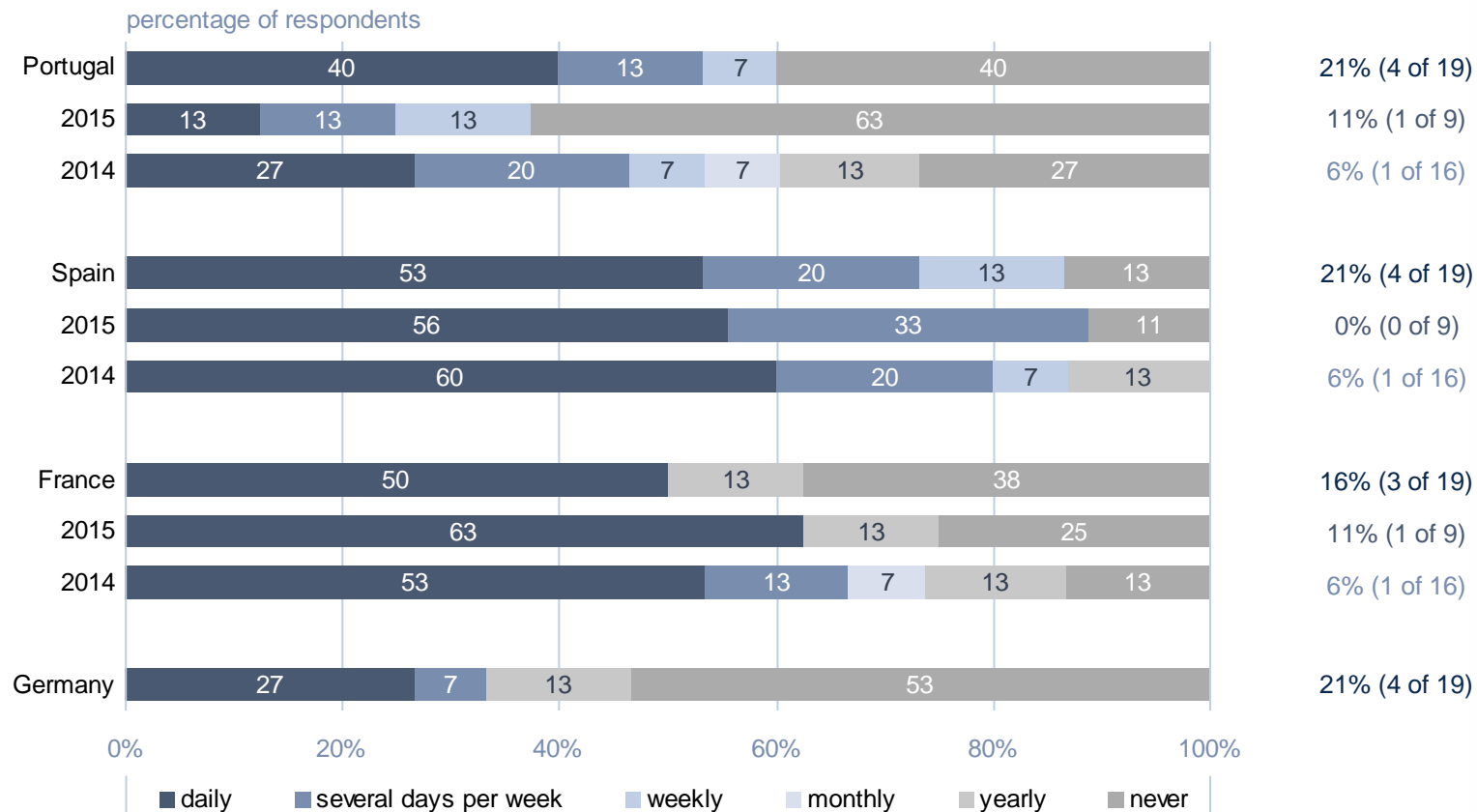


3 Sample Description



"To which of the following types of target groups does your company belong?"

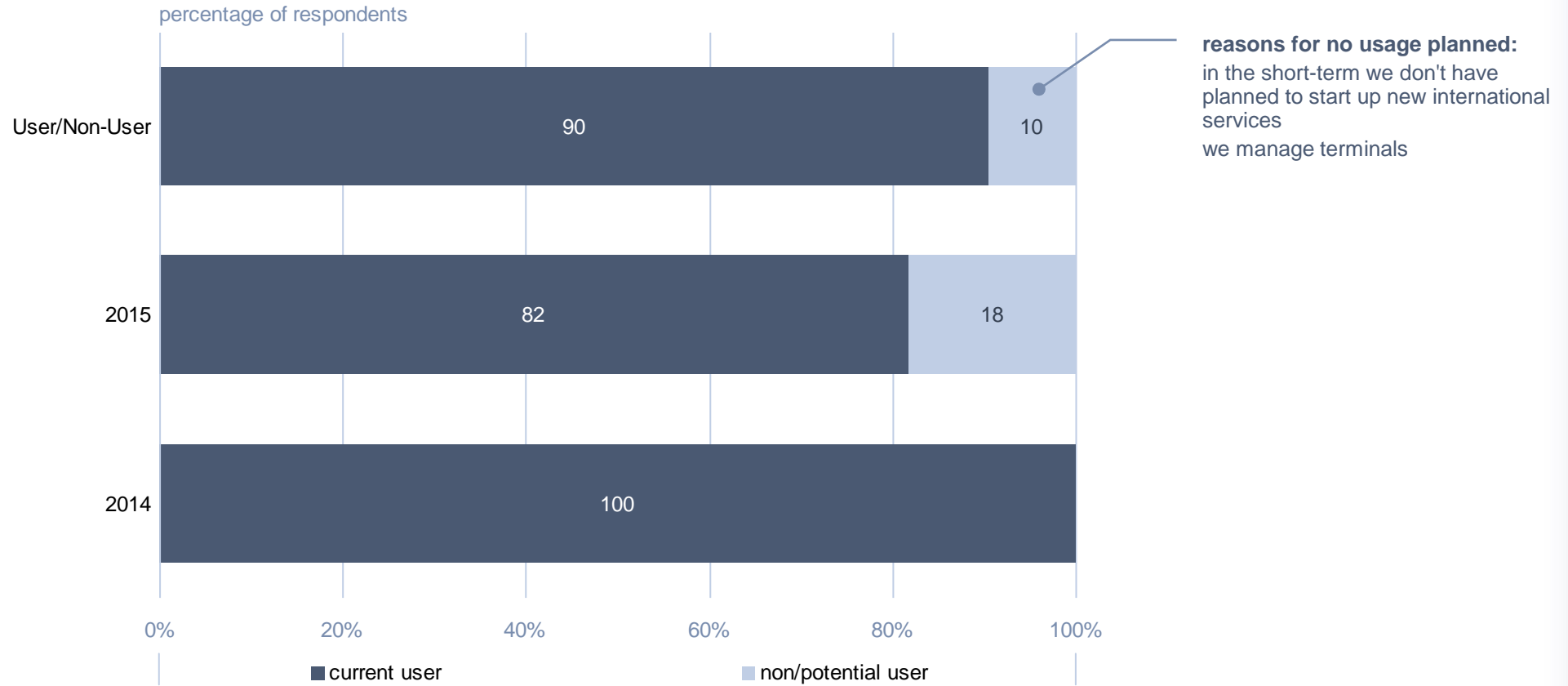
n = 21; 11 (non/potential users included)



"How frequently does your company operate/run international services on the following sections of this corridor?"

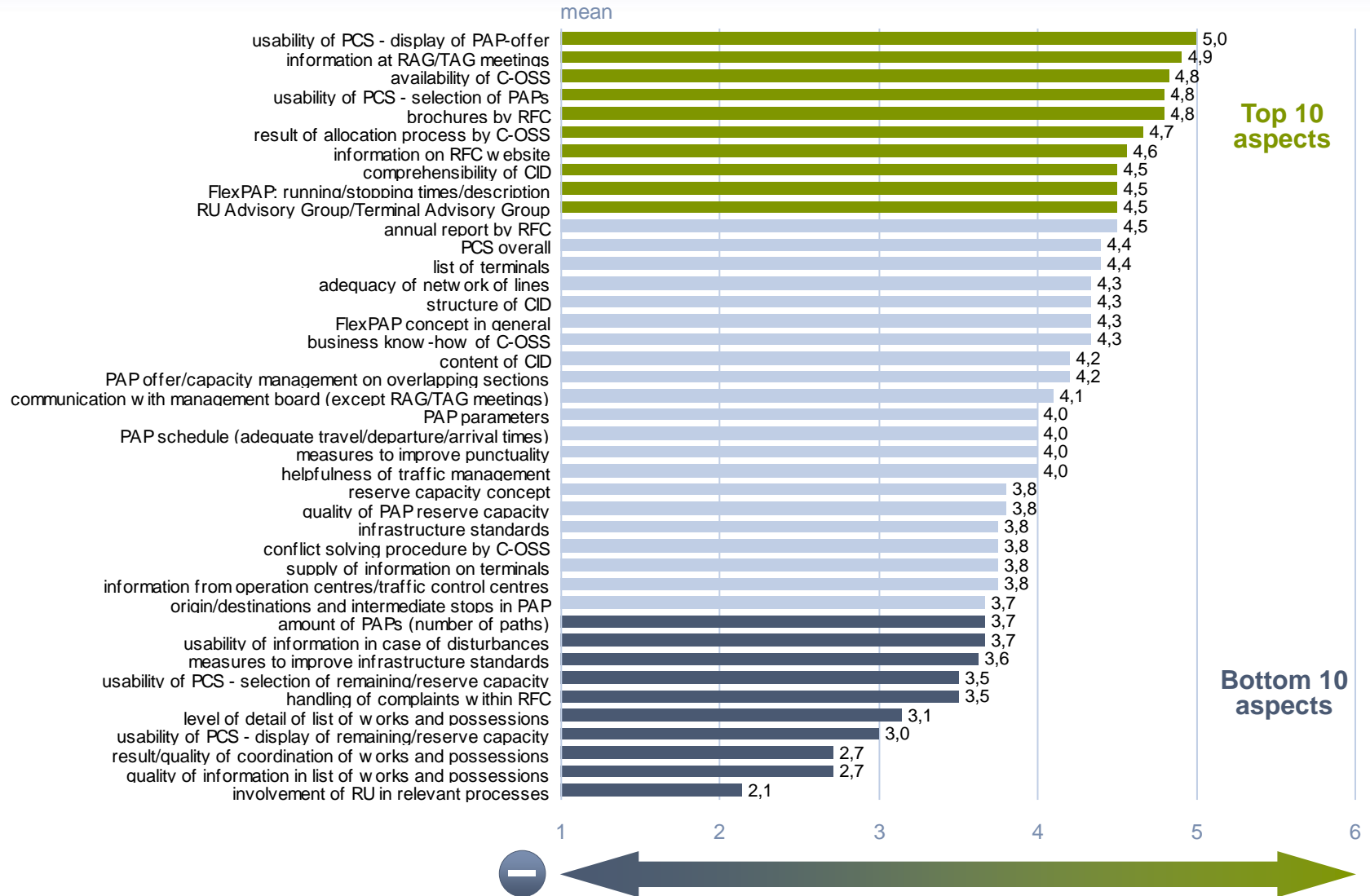


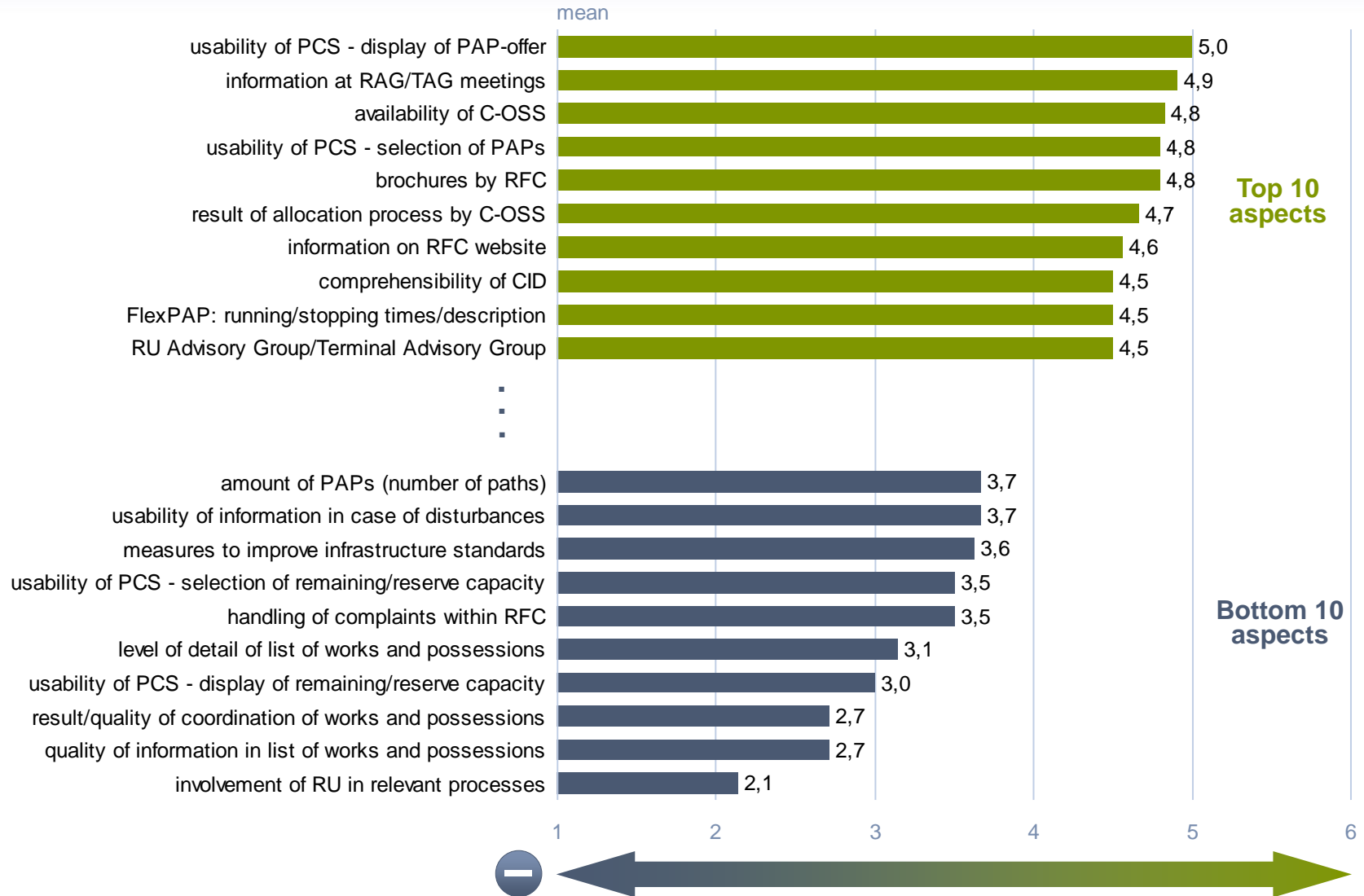
4 Non/potential users

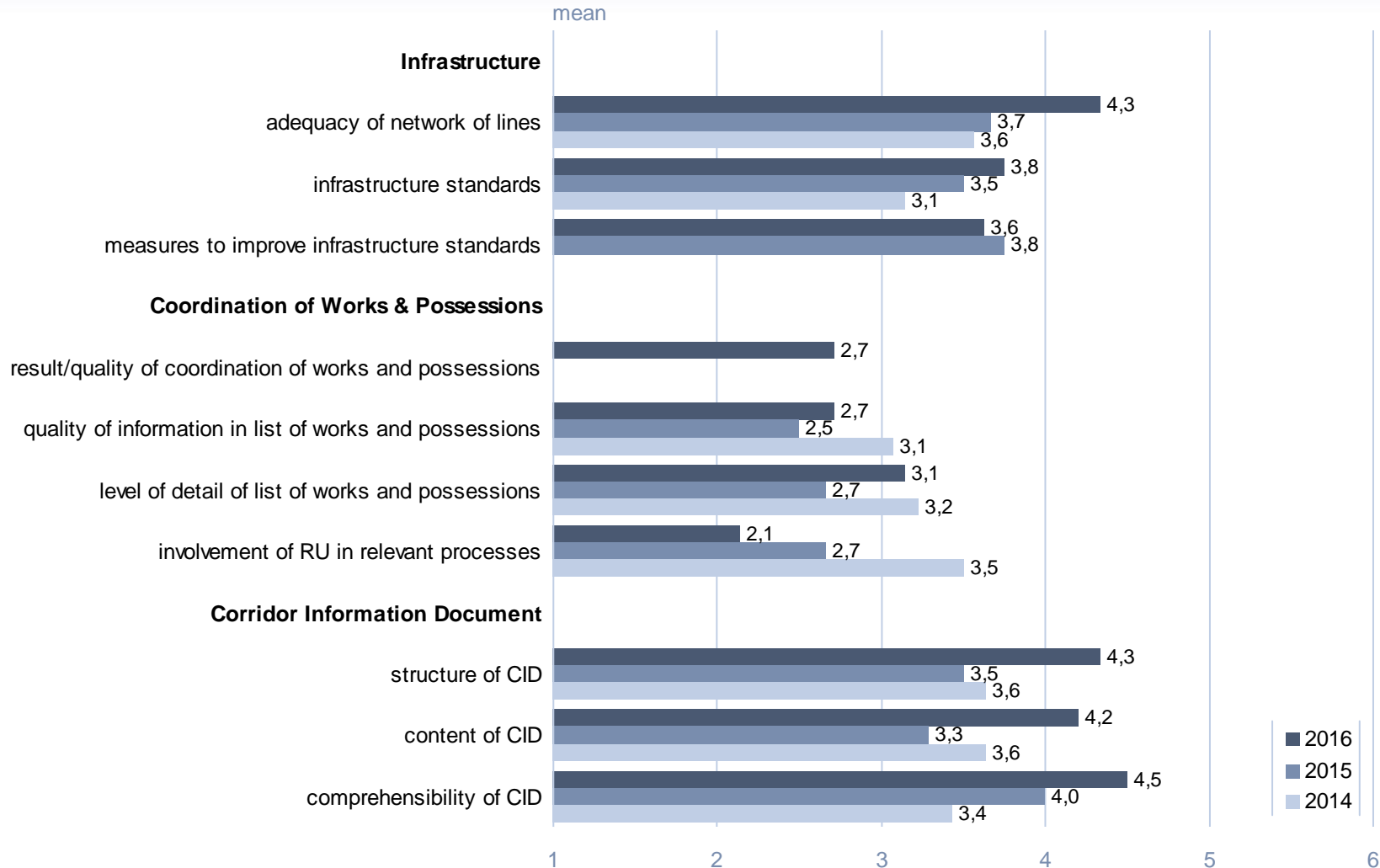




5 Summary

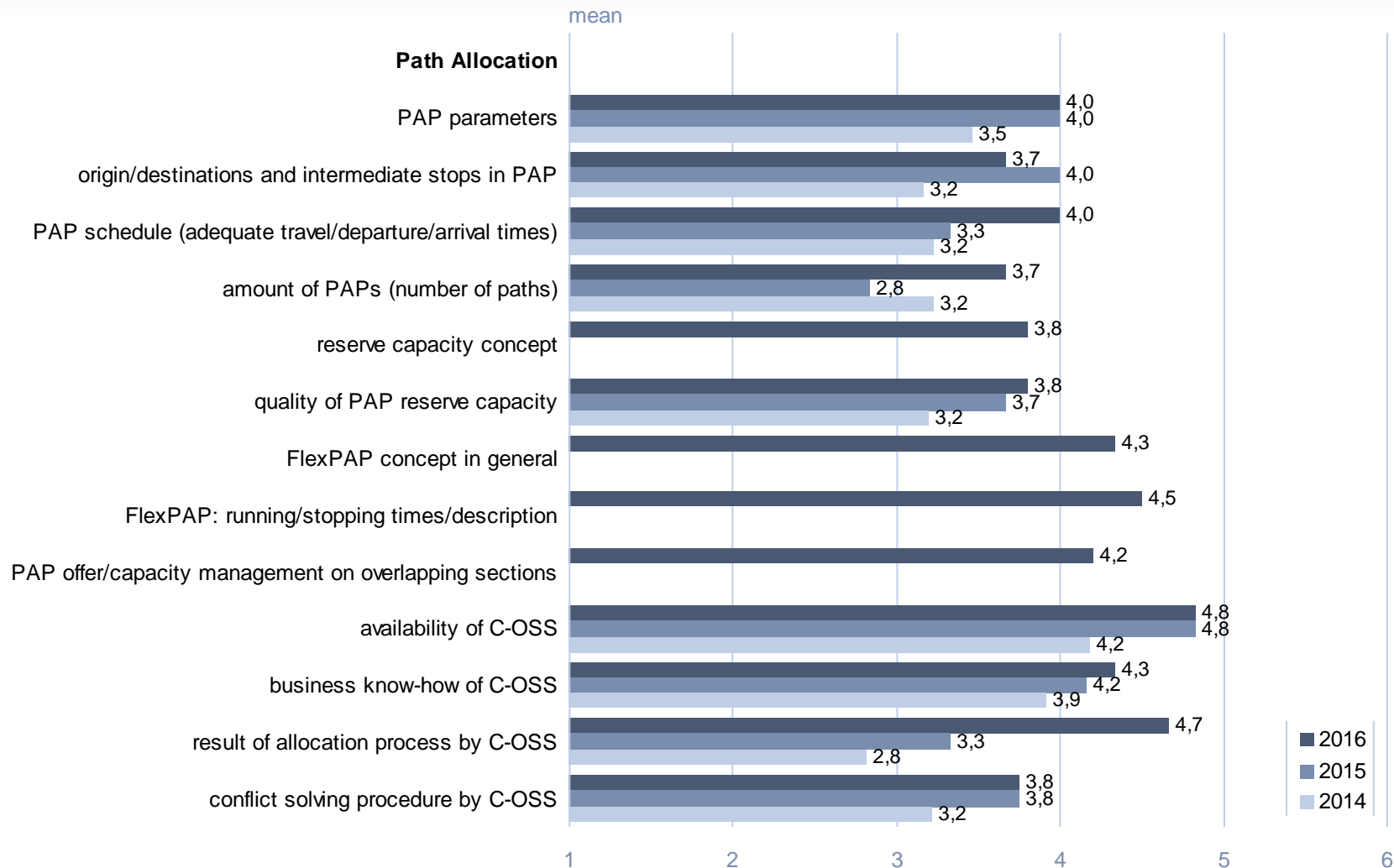






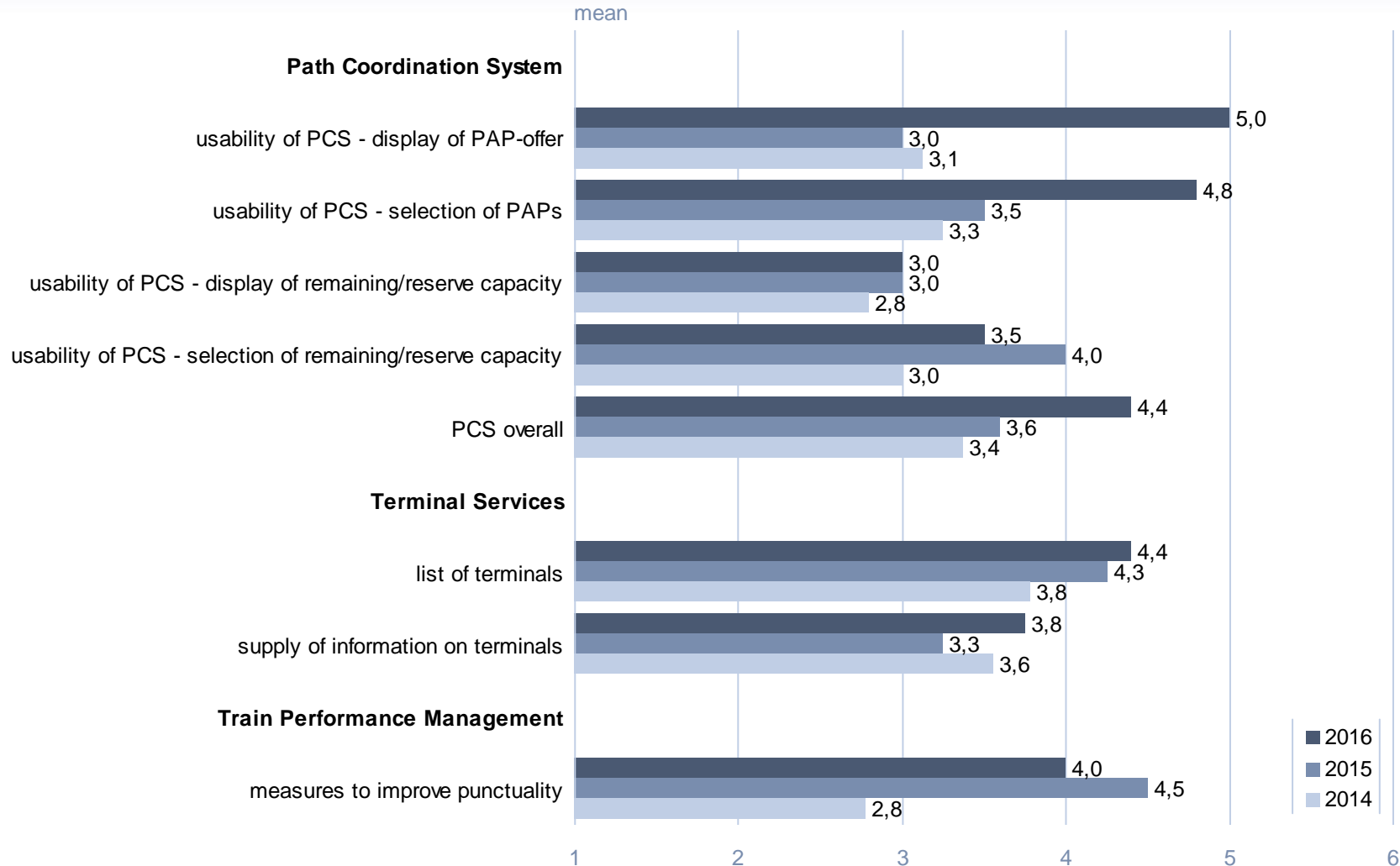
Attention: very small sample sizes!





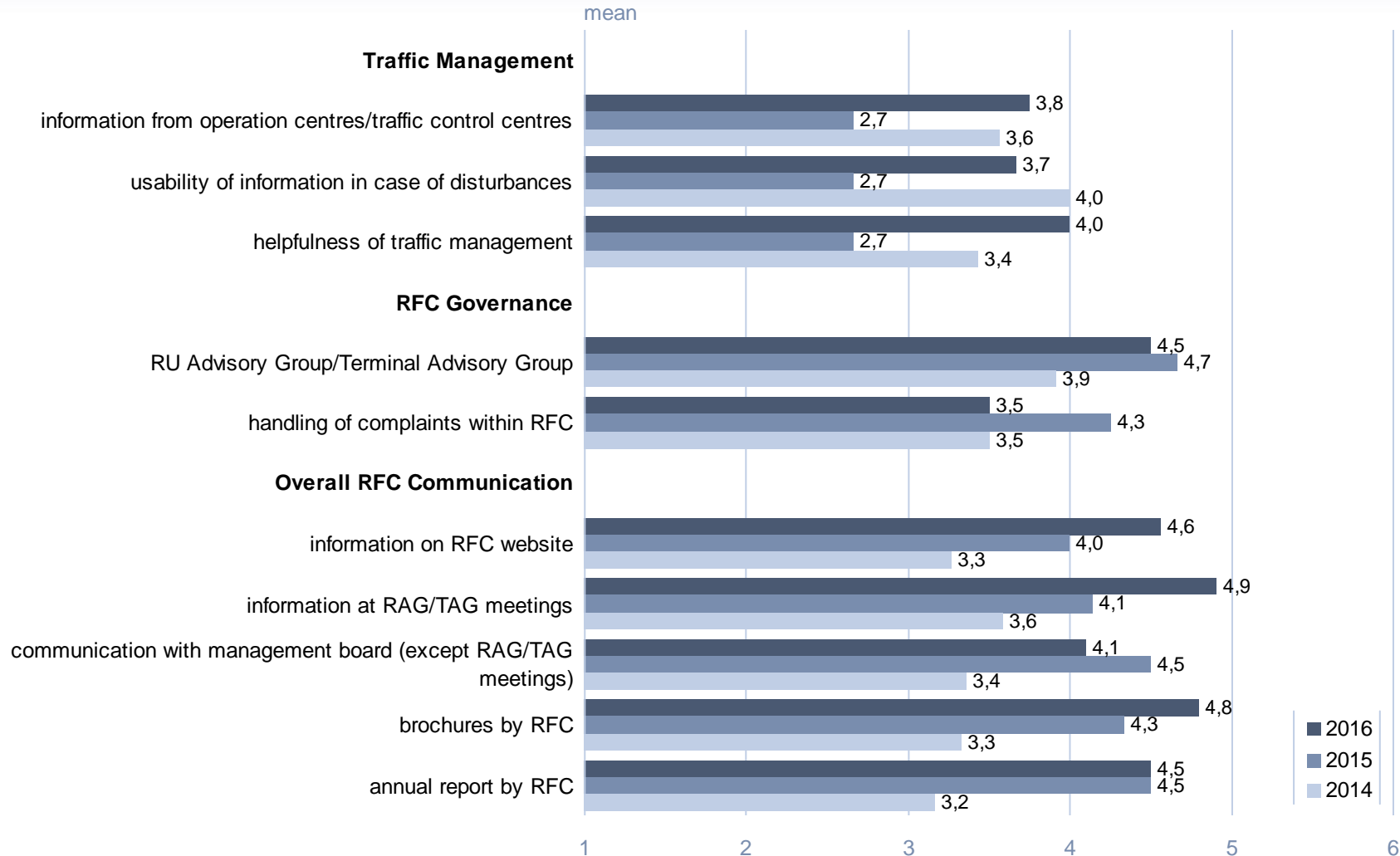
Attention: very small sample sizes!





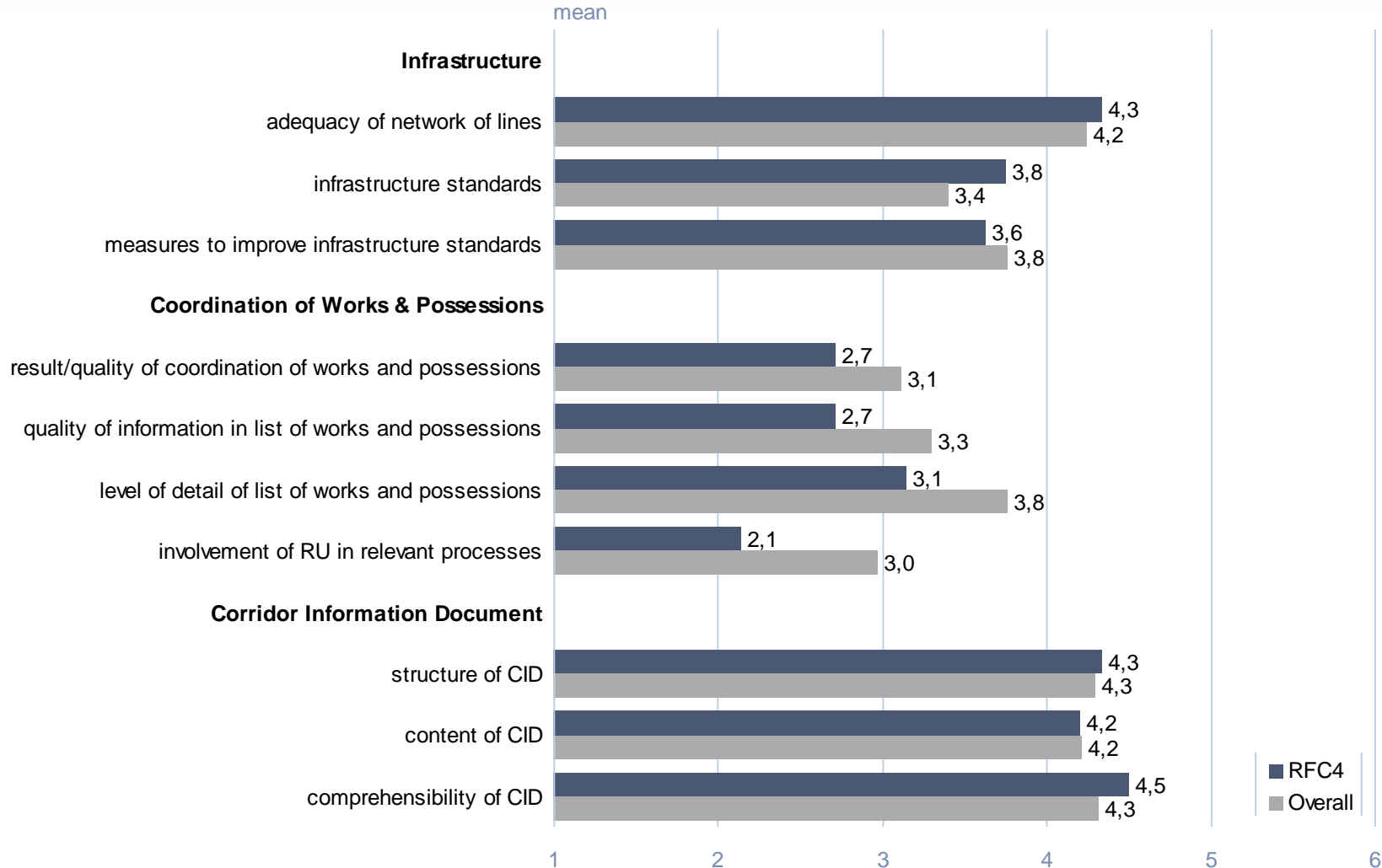
Attention: very small sample sizes!





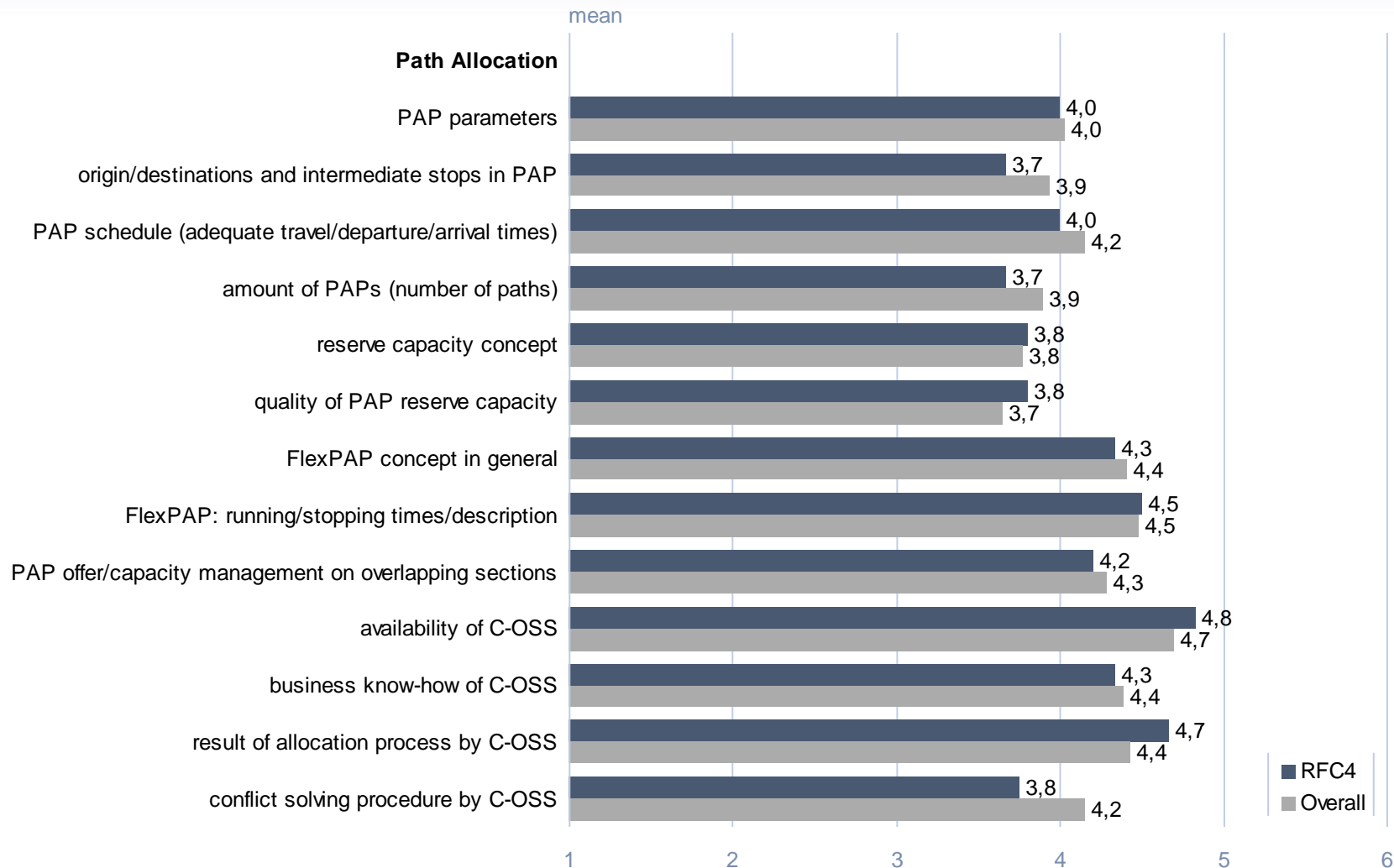
Attention: very small sample sizes!





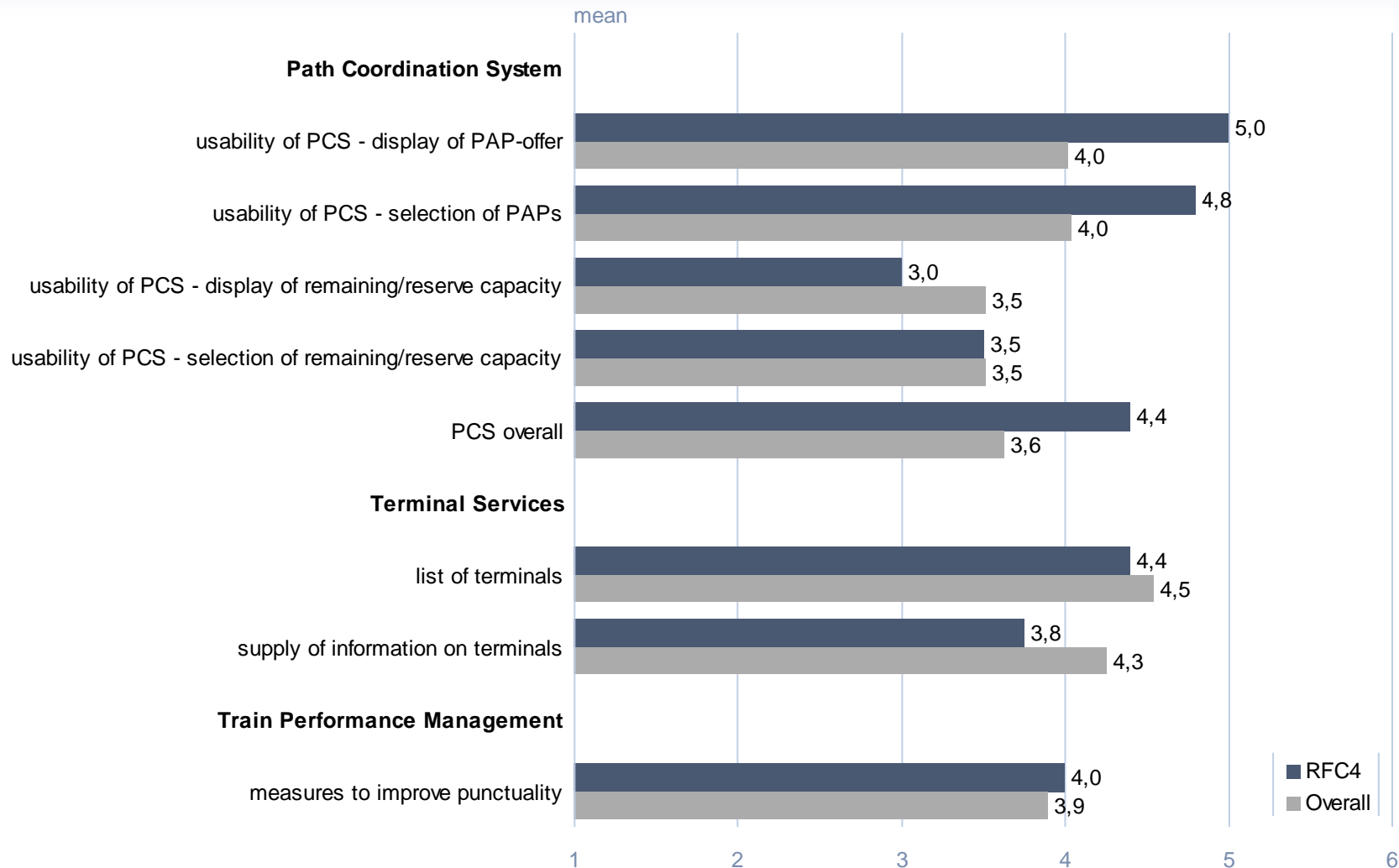
Attention: very small sample sizes!





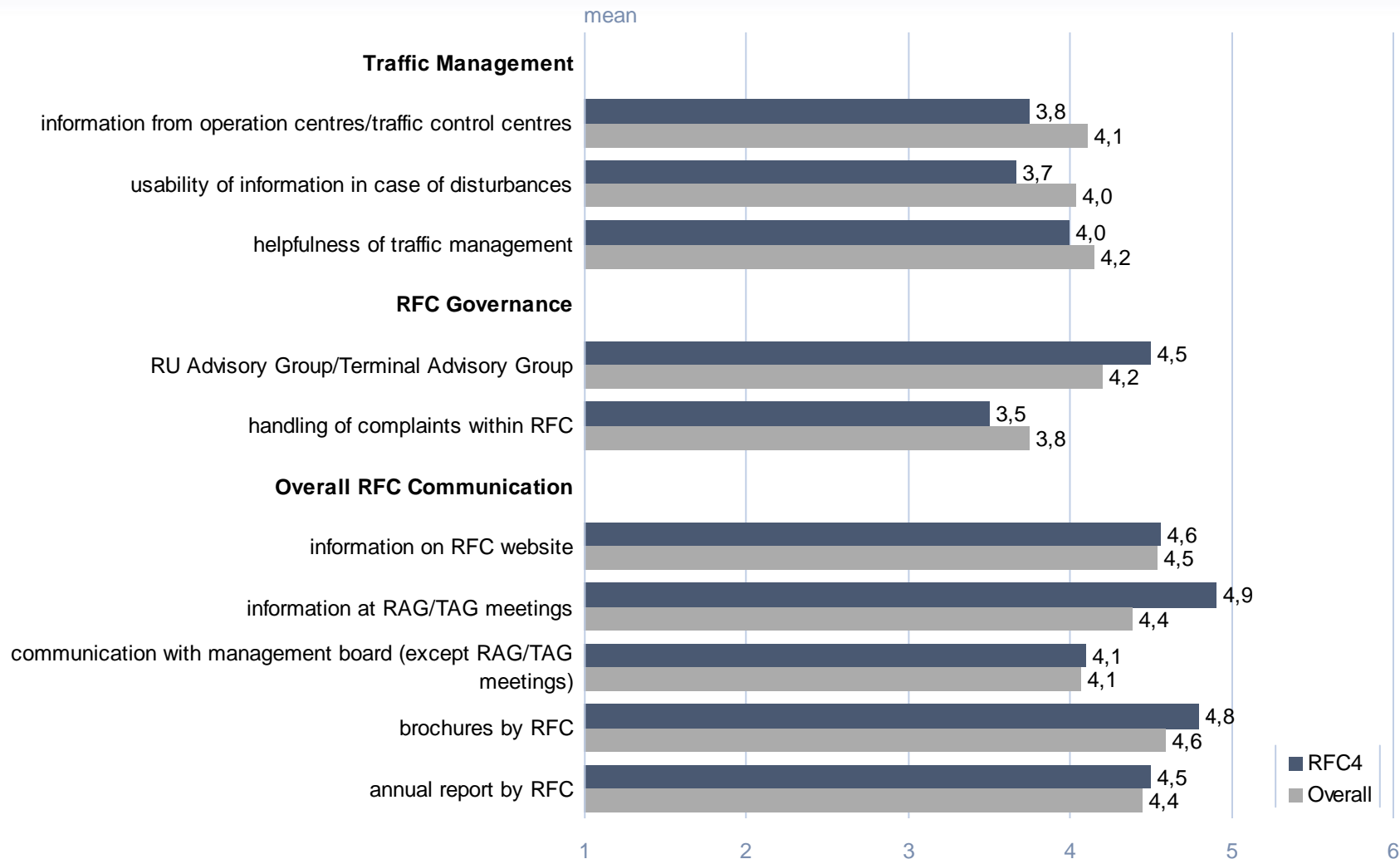
Attention: very small sample sizes!





Attention: very small sample sizes!





Attention: very small sample sizes!



Dr.
Christian Bosch

Managing Director

+43-1-369 46 26-16
c.bosch@marketmind.at



Mag.
Martin Fuchs

Senior Research Consultant

+43-1-369 46 26-26
m.fuchs@marketmind.at

