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Marketing Evolution

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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.

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RFC User Satisfaction Survey 2017

Report for RFC 1

CORRIDOR RHINE-ALPINE

RNE RailNetEurope

Co-financed by the European Union
Connecting Europe Facility

November 2017

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1 Study Design

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Survey Design

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- **22 respondents**
  22 RFC1 users / 0 non-users
  21 full interviews / 1 partial interviews
  17 nominated by RFC1 / 5 nominated by other RFCs
  11 agreed to forward name/company
  9 used topic-forward
- Computer Aided Web Interviews (CAWI)
- Contacts (e-mail address) delivered by RFCs
- 66 e-mail invitations sent
- Field Phase: 12 September to 18 October 2017

2 Satisfaction with the RFC

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Overall Satisfaction

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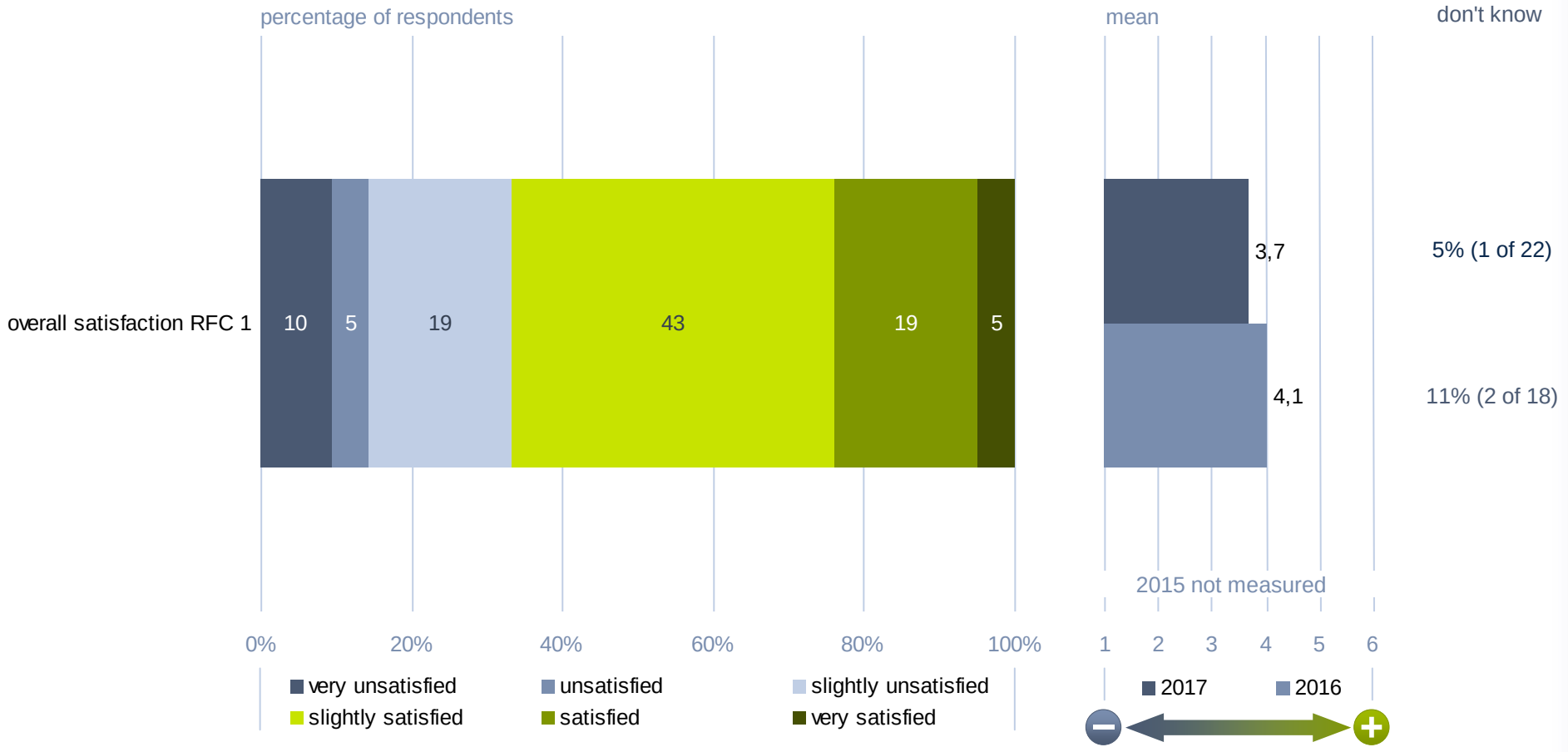

"Overall, how satisfied are you in general as a user of the RFC(s)?"

n = 22; 18

General feedback || open question

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-define alternative routes
-coordination of works between RFC (on alternative and cross route sections)
-coordination with other RFC at various levels (alternative route description)
-focus more on maritime flows going to or from deep sea terminals
-further improvement of working methods/efficiency; good step already in the past year
-harmonization of processes and rules between different countries/IMs urgent
-I would like to feel the corridor more than today
-questions about the Communication with the Executive Board are missing
-increase the number of slots
-we very much appreciate the growing coordination and cooperation with the Coordinator of the Rhine-Alpine Core Corridor
-alternative routing / contingency plans on RFC
-be an enabler by providing data to bundle maritime flows
-harmonize ETCS
-information provided on websites unfortunately not always complete
-more and timely information about concrete operational topics
-more rapid deployment of investment at cross border level (incl. ERTMS, coord. works, long trains etc.)
-the RFC should have a budget for "small" investments with big impact
-to increase the stop at the border for technical operations
-take the lead in coordinating construction sites
-harmonized TCM required
-parameters (length, weight) of PaPs at the same border need to be harmonized
-take the lead in completing missing links / eliminating bottlenecks
-harmonized und concerted ERTMS/ETCS deployment required, RUs investments to be considered
-Offer should consider construction works at borders; in case of capacity restriction at borders, IMs at the same border should provide offer for the same running days, also for deviating route during construction works both IMs should provide same days
-reduce restrictions on border crossings (requirements for language, engines)
-take the lead in aligning ERTMS deployment between IM (NL/DE/BE)
-increase speed on issues
-cooperation with other corridors to avoid disharmonized operational rules
-taking care for disturbances, whatever it takes

"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."

Satisfaction with Infrastructure

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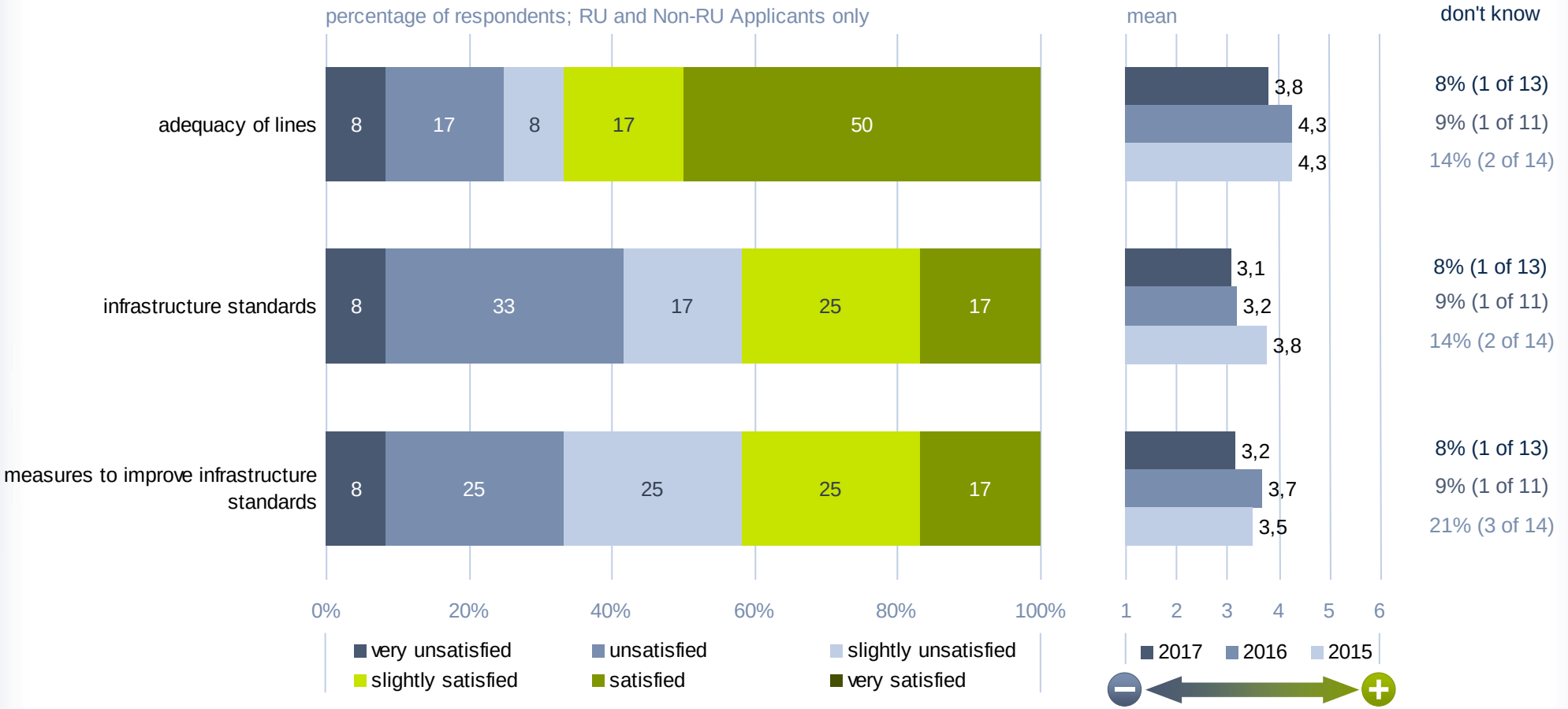

"To what extent are you satisfied with the adequacy of the lines assigned to the RFC? || … with the infrastructure standards of all designated lines, including diversionary routes dedicated to the RFC, concerning parameters such as train length, axle load, electrification, loading gauges, etc.? || … with the measures taken by the RFCs' Infrastructure Managers to improve the infrastructure standards on the lines assigned to the RFC?"

n = 13; 11; 14

Reasons for dissatisfaction with Infrastructure || open question

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-finishing of enhancing of parameters is not secured for originally agreed upon timeframes
-no plans to increase train length in Germany
-too many works on the lines
-train Length... lack of progress
-Rastatt incident, no risk management by RFC
-we ordered slots on the Italian side and did not get an answer
-closure announcement terms really short
-non-coordination of international construction sites (Aachen West and Venlo at the same time)
-needed parameters not available on division routes
-no plans to increase capacity in high density nodes in Italy
-no activities to harmonize ECTS
-not enough capacity on division routes

"If you are 'unsatisfied' or 'very unsatisfied' with any of the topics in this chapter, 'Infrastructure', please specify the main reasons and your proposals and ideas for further improvement."

Satisfaction with Coordination of Works & Possessions

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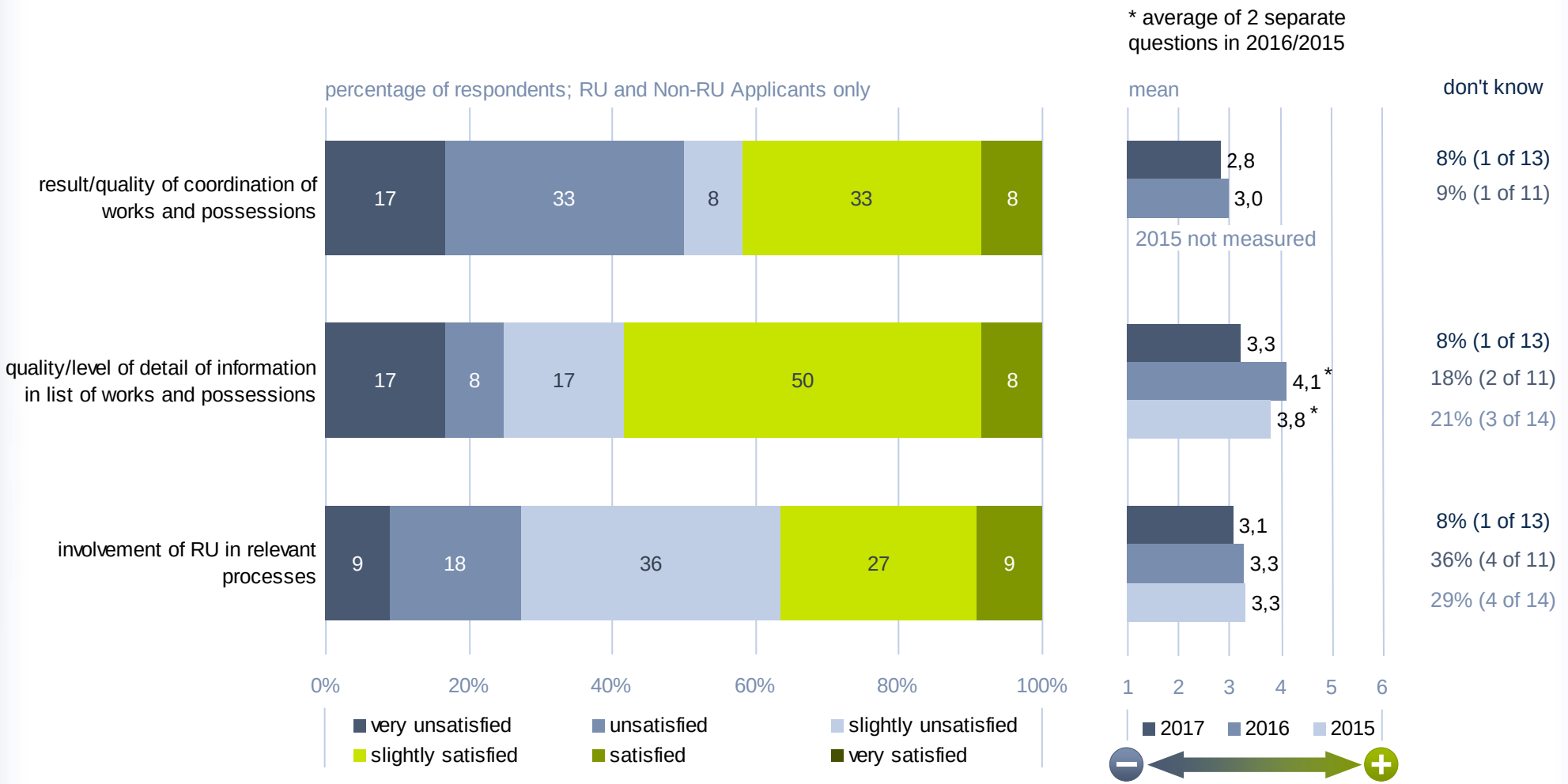

"To what extent are you satisfied with the result/quality of the coordination of planned temporary capacity restrictions (works and possessions) on the RFC? || … with the quality and level of detail of the information given in the list of planned temporary capacity restrictions (works and possessions),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

n = 13; 11; 14

Reasons for dissatisfaction with Coordination of Works & Possessions || open question

marketmind

-in many cases no information on capacity reduction/deviations/ etc. - information very infrastructure friendly (only parts of routes, not the effect on the whole train-run)

-no harmonization between IMs in northern part of the corridor (DE/BE)

-not much coordination experienced

-little integration with lines on other corridors; no proposal was made in case of a change of corridor

-Rastatt incident, no risk management by RFC

-non-coordination of international construction sites (Aachen West and Venlo at the same time)

-no activities to harmonize ECTS

-announcement on short notive

-is the corridor "fighting" for corridor capacity at the meetings that define restrictions (e.g. BID DB Netz)? never noticed attendance

-no respect of official RNE-process (new annex VII to directive 2012/34/EU)

-our complaints not considered by RFI

-multi-corridor PaP request in order to handle interruptions like Rastatt (DE)

- no additive planning of constructions in many cases regarding running times on the corridor or even within the country (Germany 2017: Aachen + Rheintal + S13 + Luino...)

-no single point of contact - national infrastructures and therefore coordination of RU needed

-references for information e.g. on capacity for Rastatt are to very general sites like www.dbnetzte.com/kontakte, information in that case generally very slow

-no coordination of corridor noticeable

"If you are 'unsatisfied' or 'very unsatisfied' with any of the topics in this chapter, 'Coordination and communication of planned temporary capacity restrictions', please specify the main reasons and your proposals and ideas for further improvement."

Satisfaction with Corridor Information Document (CID)

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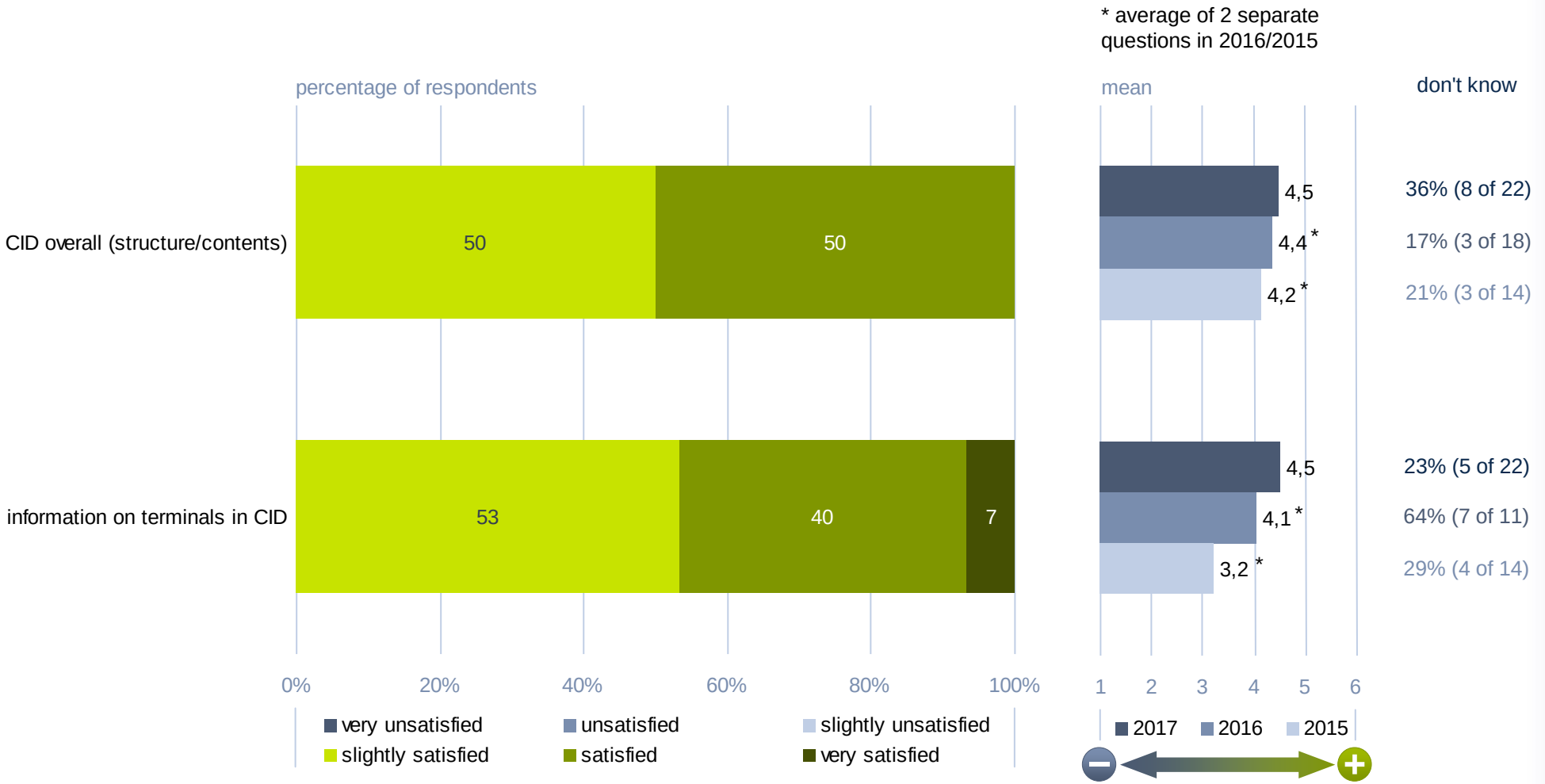

"To what extent are you satisfied with the Corridor Information Document (CID) for the 2018 timetable year? (Can you easily find all the information you are looking for and is it structured in a logical way? Do the contents match your business needs? Is the level of detail sufficient?) || To what extent are you satisfied with the supply of information on terminals? (Are all relevant pieces of information on terminals included in the CID 2018 or in other sources, e.g. CIP)?)"

n = 22; 18; 14

Satisfaction with Path allocation (1) - PAP

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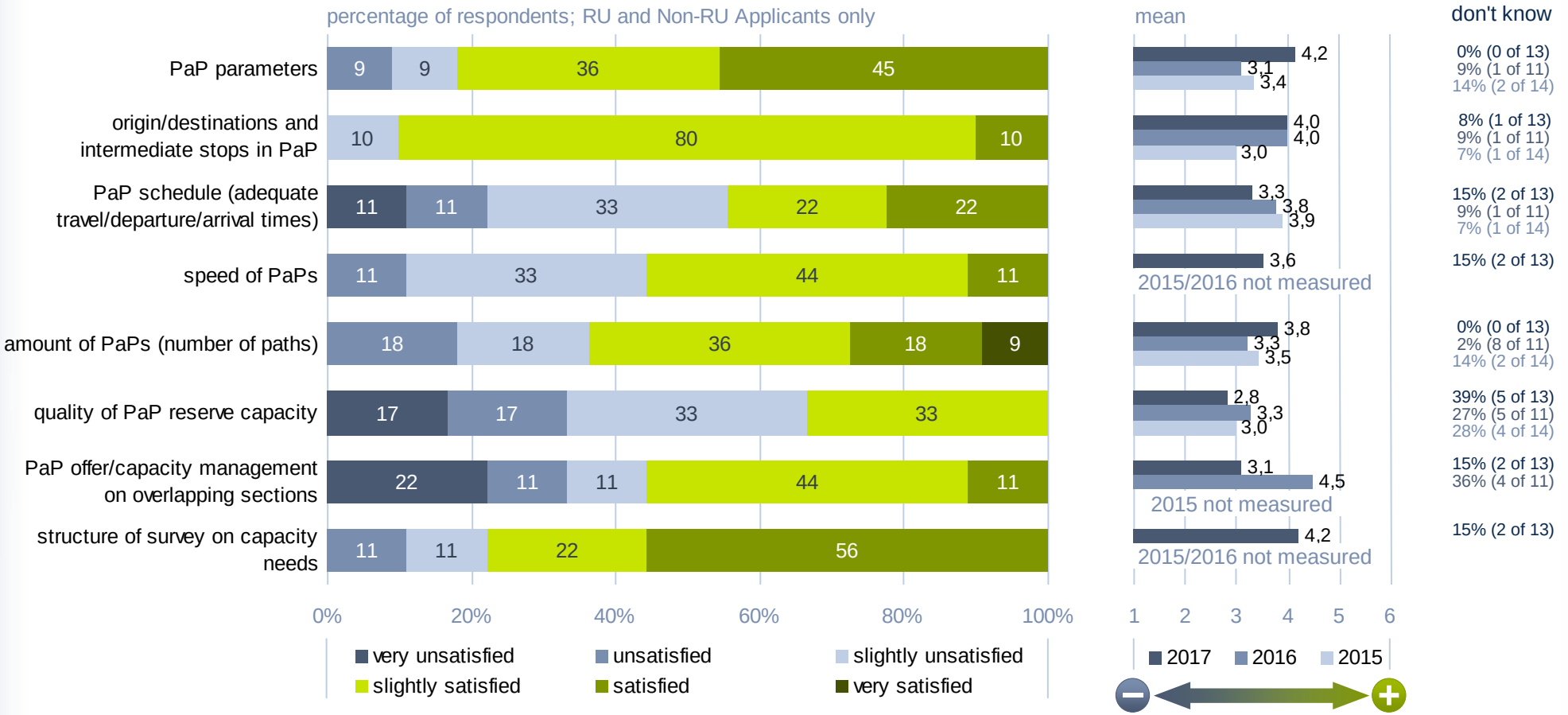

"To what extent are you satisfied with the Pre-arranged Path (PaP) parameters such as length, weight, etc.? || … with the origins/destinations and intermediate stops? || … with the PaP schedule? || … with the speed of PaPs? || … with the amount of the PaPs? Is there a sufficient number of PaPs? || …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

n = 13; 11; 14

Satisfaction with Path allocation (3) - FlexPAP & NetPAP

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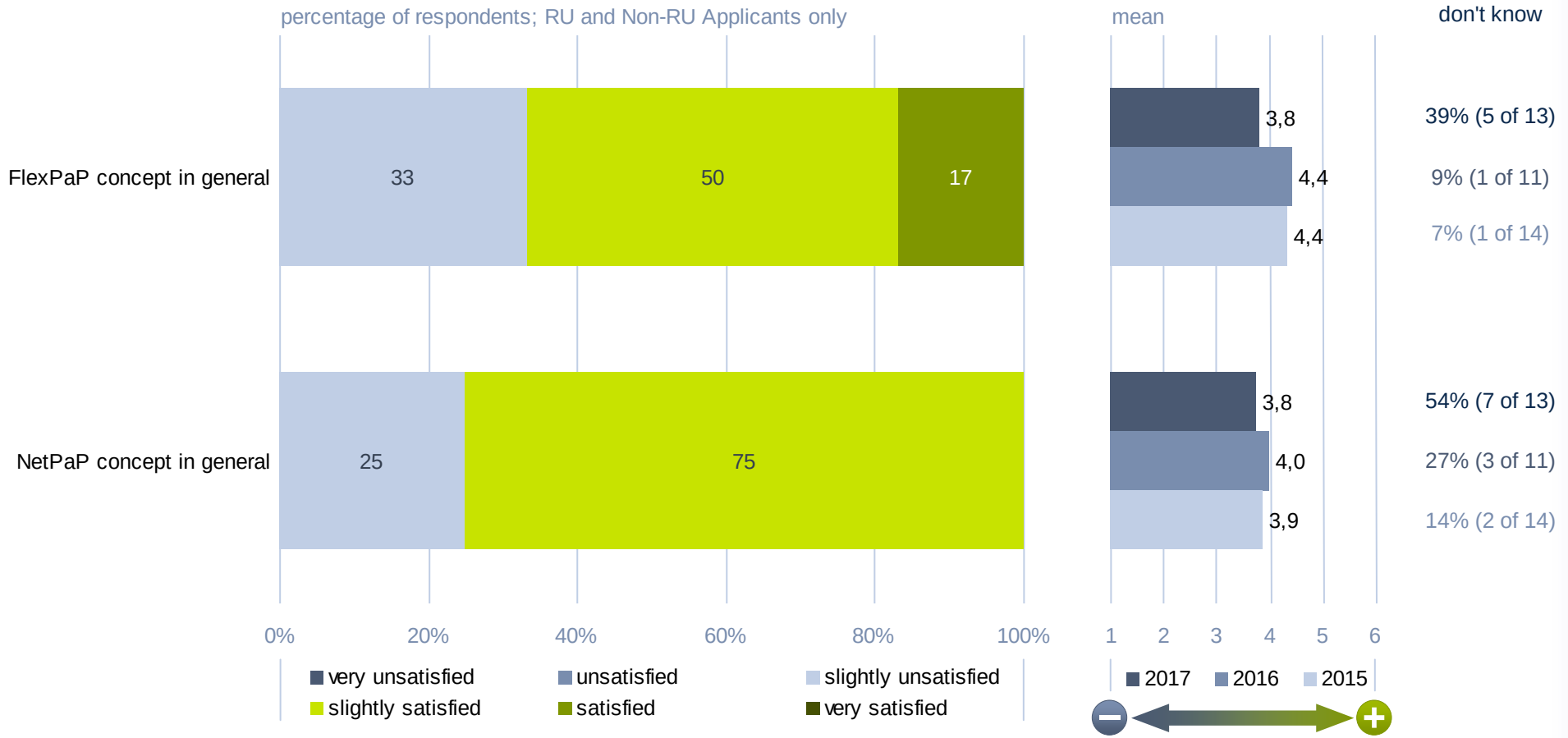

"How satisfied are you with the FlexPAP concept? || How satisfied are you with the Net-PaP concept to influence / improve the priority value of your PaP request in case of conflicts?"

n = 13; 11; 14

Usage of C-OSS

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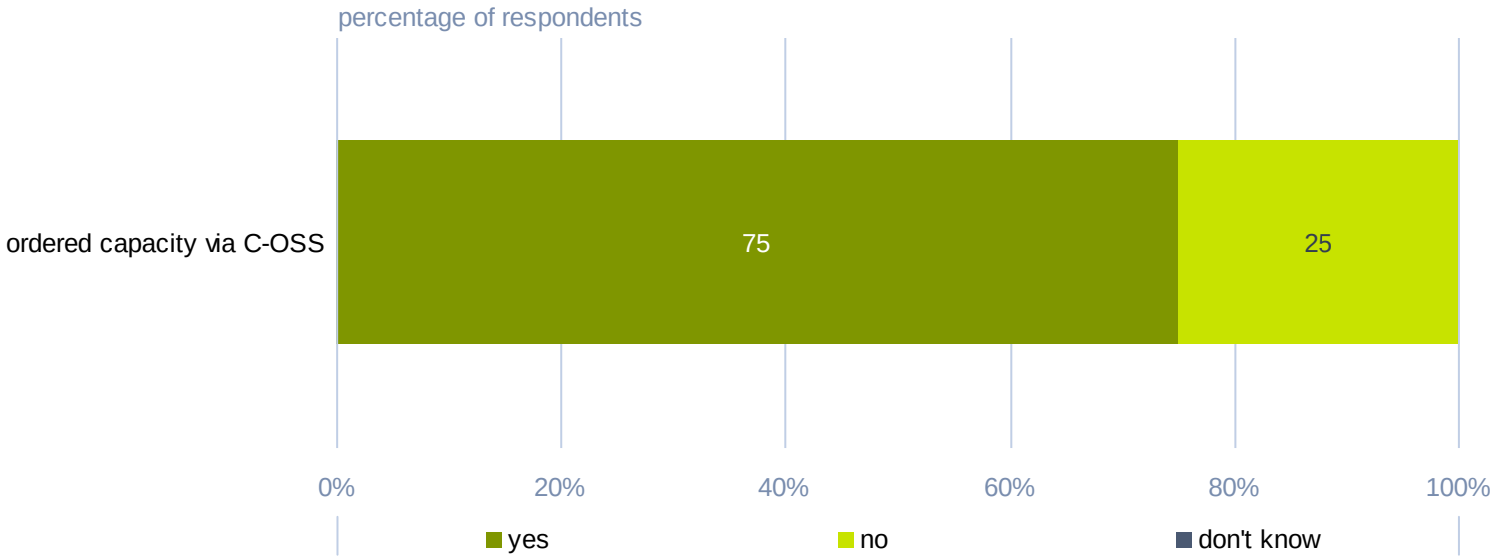

Reasons for non-usage:
-because we run single wagon traffic that is split at the border
-difficulties harmonizing all involved RUs
-insufficient choice
-we use only part of the corridor

"Did you order capacity via the C-OSS? || What are the reasons you did not order capacity via the C-OSS?"

n = 22

Satisfaction with Path allocation (4) - C-OSS

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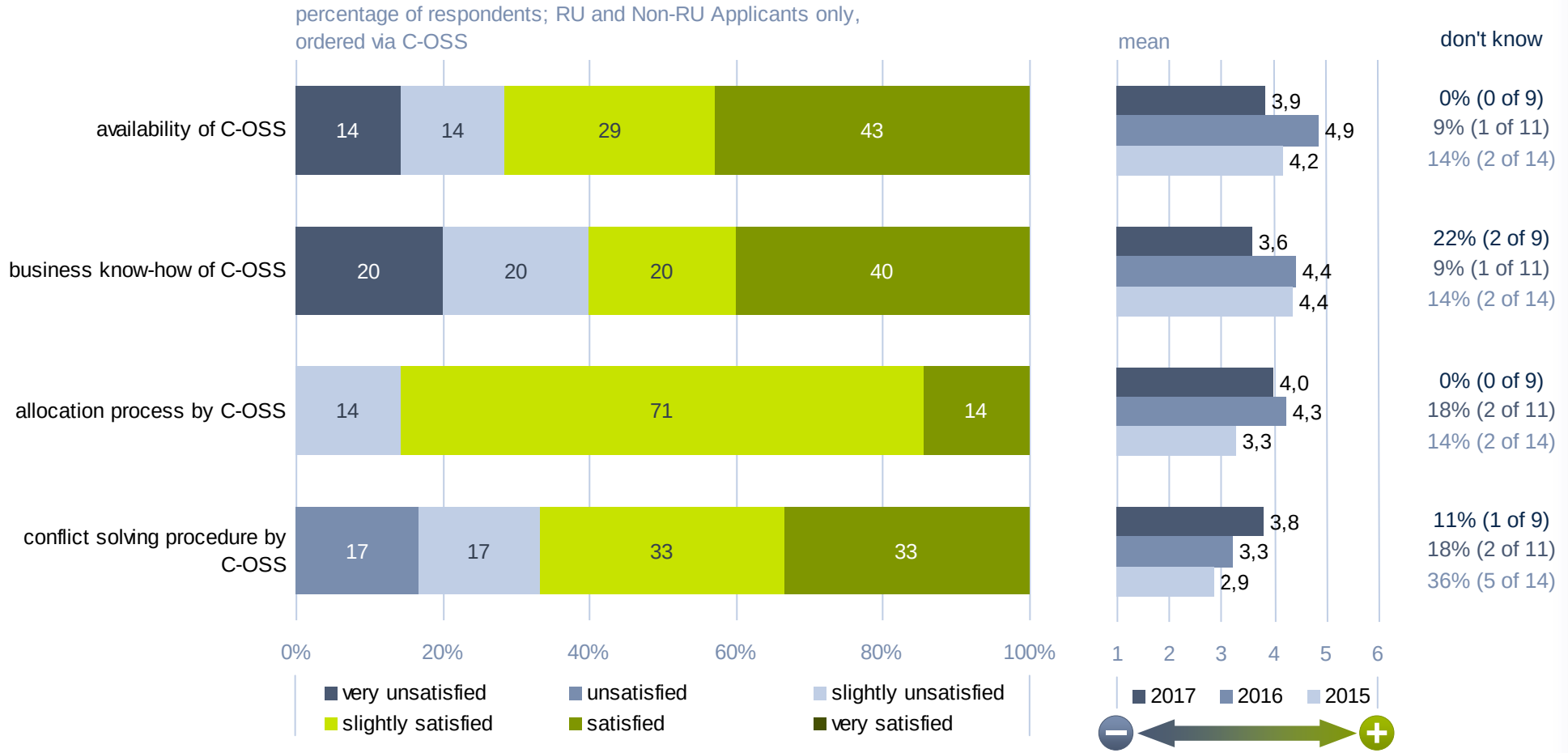

"How satisfied are you with the availability of the Corridor One-Stop Shop (C-OSS)? (Is the reaction time of the C-OSS adequate?) || How satisfied are you with the business know-how of the C-OSS? || How satisfied are you with the allocation process for the 2018 timetable year? (Please consider especially the pre-allocation by the C-OSS, and the delivery of the draft and final offers.) || How satisfied are you with the conflict-solving procedure?"

n = 9; 11; 14

Reasons for dissatisfaction with Path offer, PaP allocation and C-OSS || open question

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-number of Paths should be increased

-reserve capacity does not work

-reserving capacity useless for us when it does not indicate arrival times and departure

-the overall concept of PAPs is not convenient for an efficient capacity-utilizing way of producing railway on the corridor; the efficiency/capacity loss is too big, resulting of the compromise-offer suitable for many production concepts

-we ordered slots on the Italian side and did not get an answer

-it would be more helpful to have a secured capacity for the corridor which can then be used to supply individual orders for the yearly timetable

-speed of flex pap's is low - not certain that improved speed is possible

-too many interruptions affecting PaPs

-PAPs are only useful if there is no time for negotiations, in cases like e.g. ad hoc traffic or new traffic in left-over capacity, ad hoc re-routings in cases like Rastatt, etc.

"If you are 'unsatisfied' or 'very unsatisfied' with any of the topics in this chapter, 'Path offer, PaP allocation process and C-OSS', please specify the main reasons and your proposals and ideas for further improvement."

Satisfaction with Path Coordination System (PCS)

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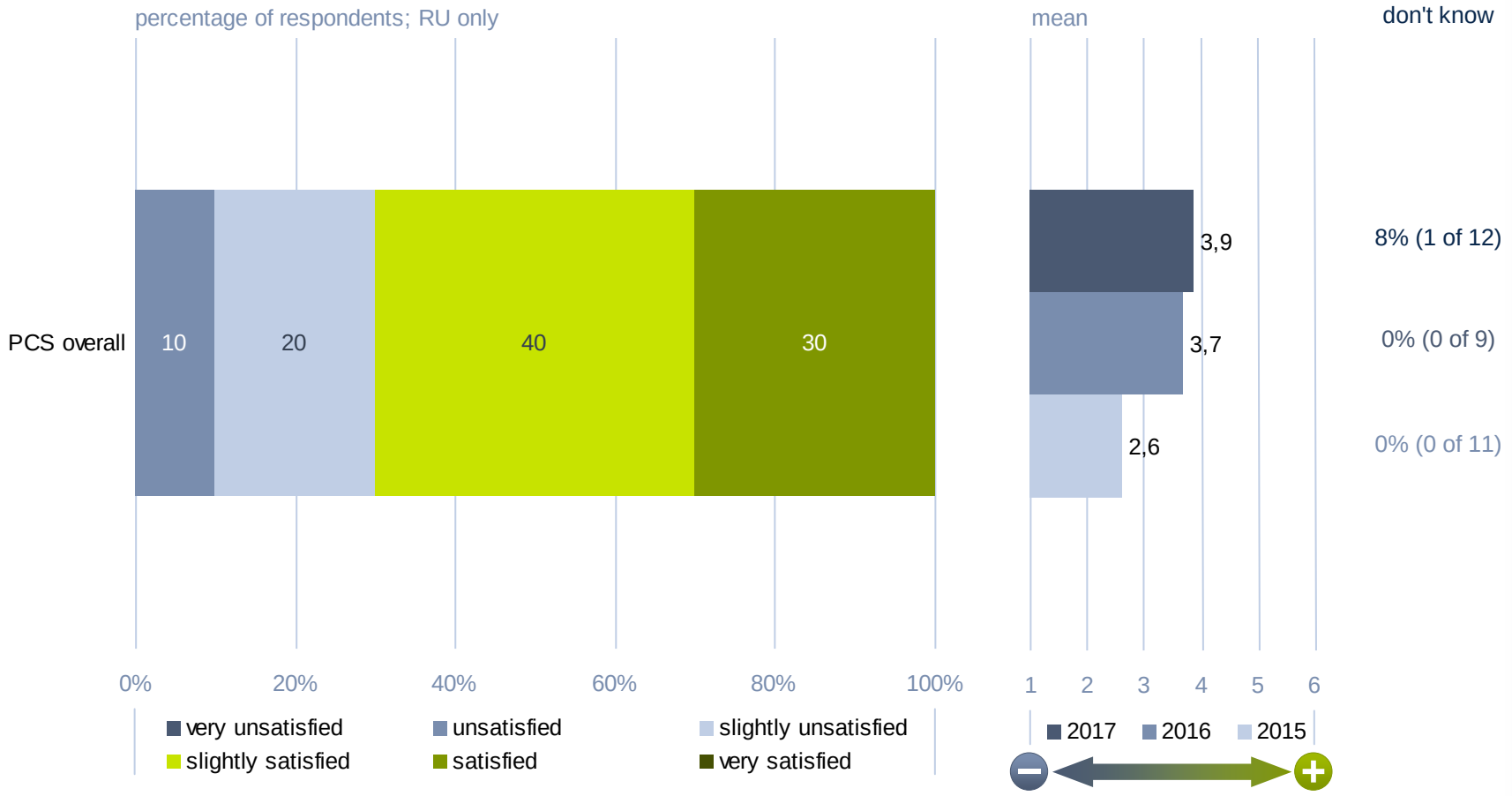

"How satisfied are you all in all with PCS as a booking tool for international path requests? Does it match your needs?"

n = 12; 9; 11

Reasons for dissatisfaction with Path Coordination System || open question

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-very time consuming due to the amount of information to be filled in; please reduce information requirements

-a lot of mistakes due to manual transferring of IMs in their national systems

-at the moment only useful as a coordination tool between parties involved for who has done what.; details are only usefully looked up in national systems, due to large amount of errors

"If you are 'unsatisfied' or 'very unsatisfied' with the topic in this chapter, 'PCS', please specify the main reasons and your proposals and ideas for further improvement."

Satisfaction with Train Performance Management

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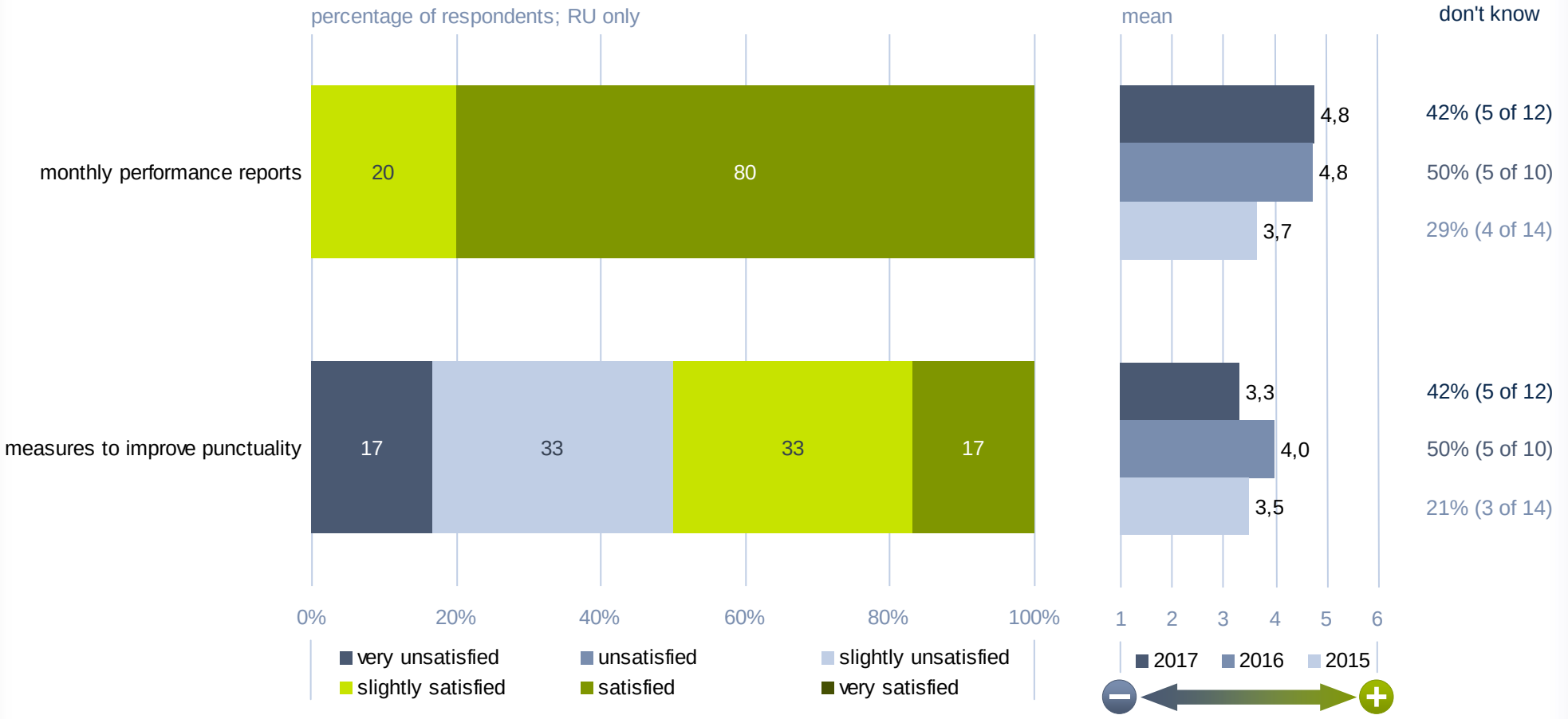

"How satisfied are you with the monthly performance reports? Do they show the information you need? || How satisfied are you with the efficiency of measures taken in order to improve punctuality?"

n = 12; 10; 14

Reasons for dissatisfaction with Train Performance Management || open question

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-TOP disaster Rastatt

-availability on alternative paths with SIMILAR performance

-we need an optimized crisis management ("plan B in any case of interruptions")

"If you are 'unsatisfied' or 'very unsatisfied' with any of the topics in this chapter, 'Train Performance Management', please specify the main reasons and your proposals and ideas for further improvement."

Satisfaction with Traffic Management

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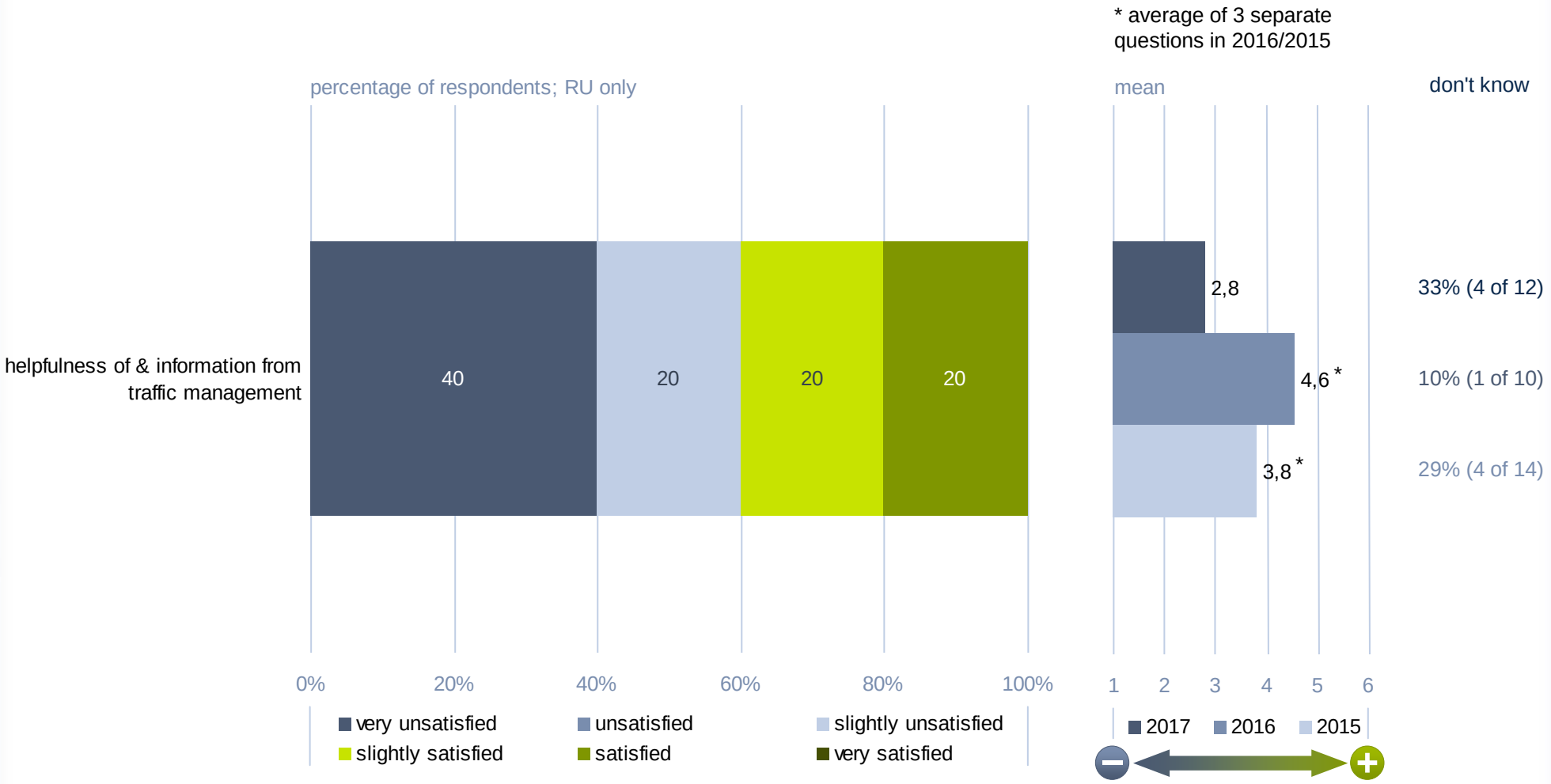

"How satisfied are you with the helpfulness of the Infrastructure Managers' traffic management on the RFC (as regards running your trains with a high service quality) and with the information you receive from them?"

n = 12; 10; 14

Reasons for dissatisfaction with Traffic Management || open question

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-no action known, which is the role of RFCs in traffic management?

"If you are 'unsatisfied' or 'very unsatisfied' with the topic in this chapter, 'Traffic Management', please specify the main reasons and your proposals and ideas for further improvement."

Satisfaction with Co-operation with the RFC Management Board (1)

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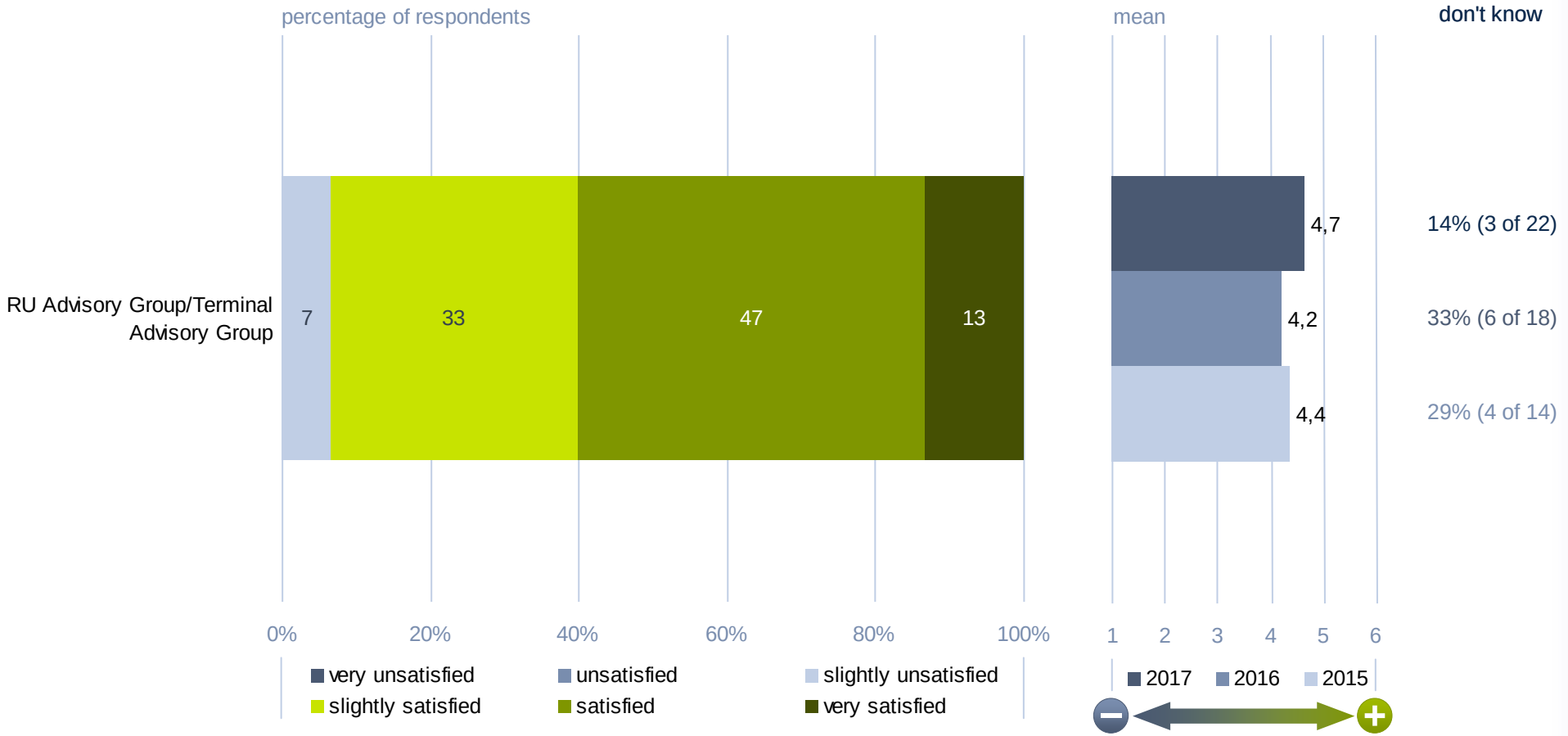

""How satisfied are you with the RU Advisory Group/Terminal Advisory Group (RAG/TAG) meetings. Is your attendance beneficial and useful for your company? (Is your attendance beneficial and useful for your company?)"

n = 22; 18; 14

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

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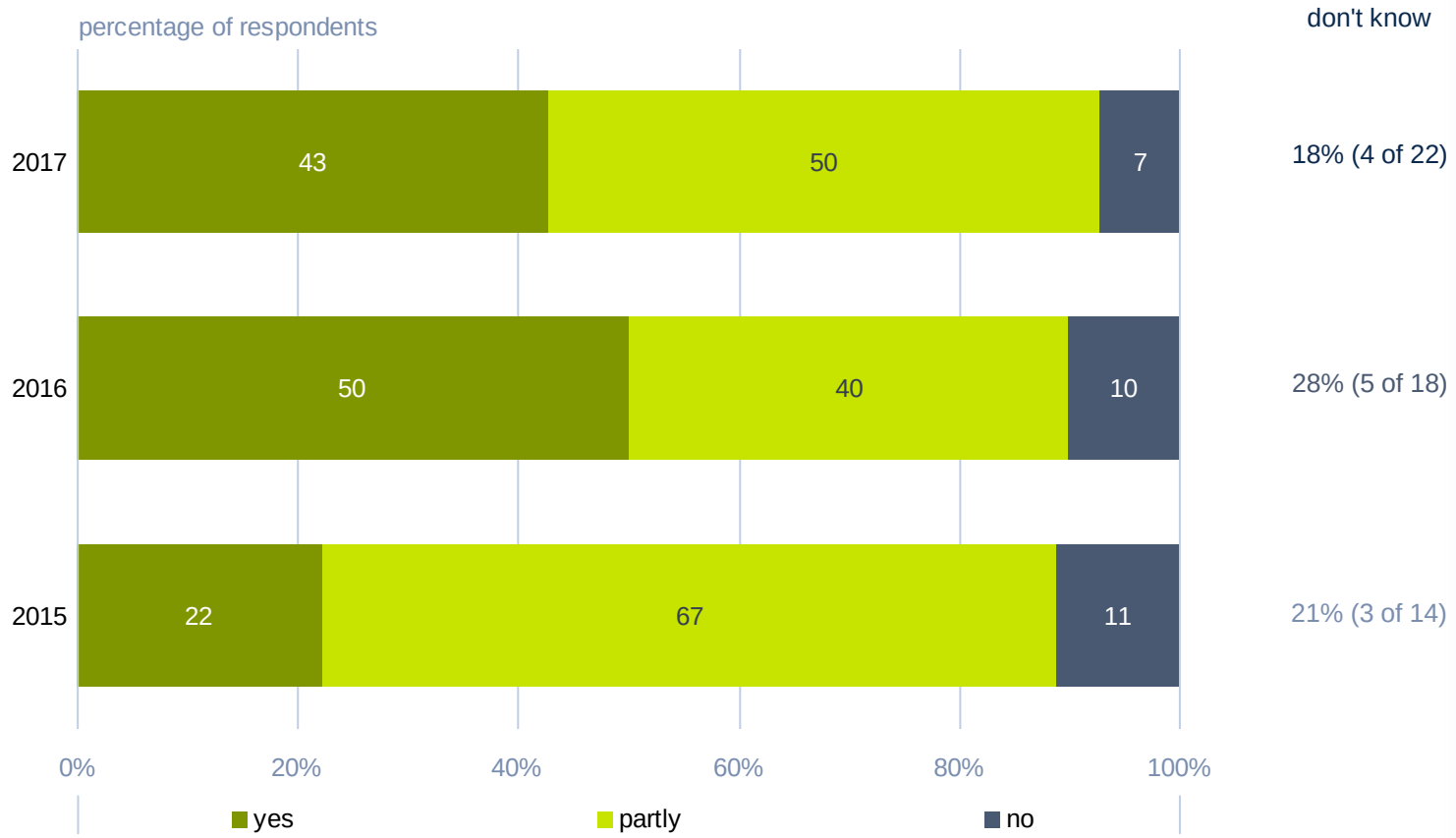

"Do you consider that the opinion of the Advisory Group has been properly taken into account by the RFC Management Board?"

n = 22; 18; 14

Reasons for dissatisfaction with RFC Governance || open question

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-problems not managed

-no solutions provided

-no real harmonization of processes between IMs

"If you are 'unsatisfied' or 'very unsatisfied' with any of the topics in this chapter, 'RFC Governance', please specify the main reasons and your proposals and ideas for improving your involvement in the RFCs' activities."

Satisfaction with Overall RFC Communication

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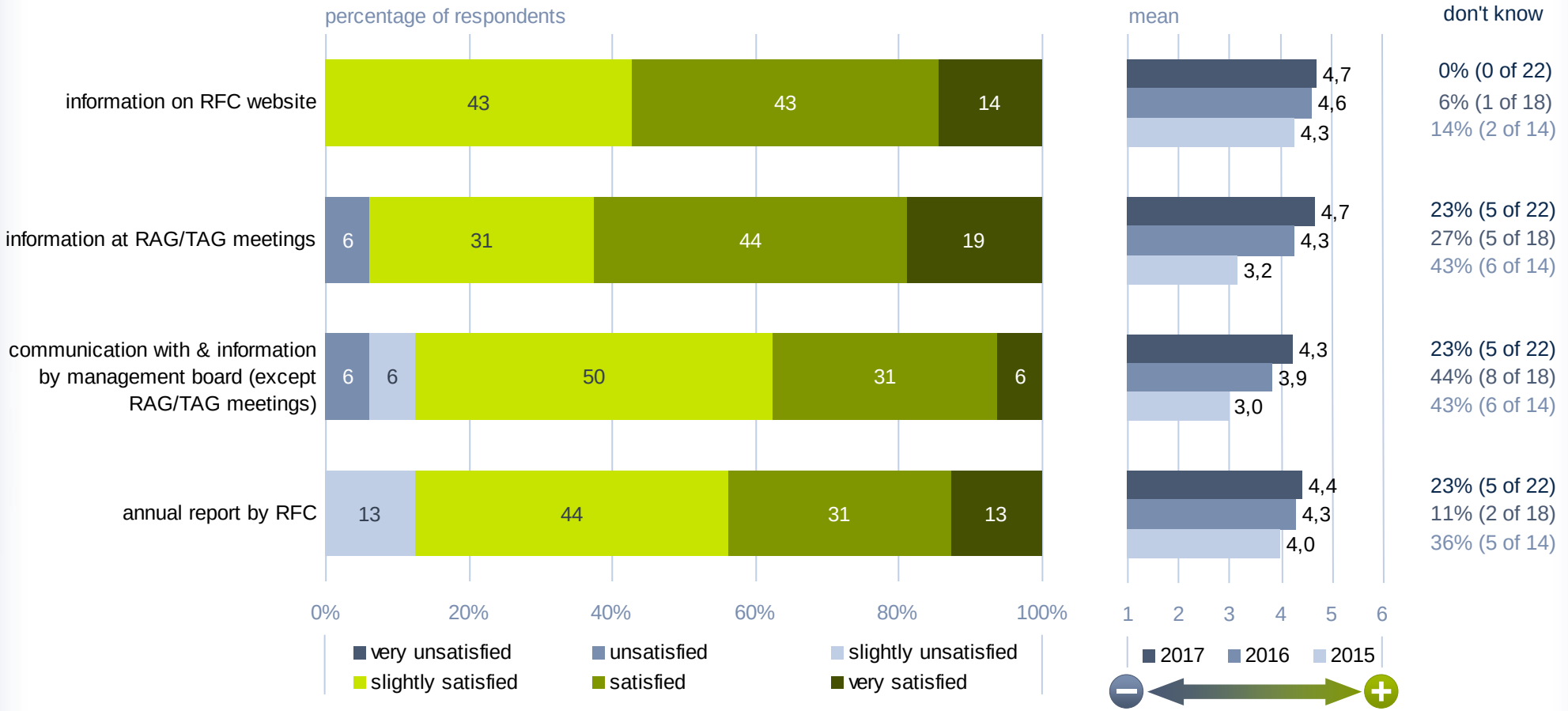


"To which extent are you satisfied with the information provided by RFC's website? || To which extent are you satisfied with the information provided by the RAG/TAG meetings? || To which extent are you satisfied with the communication with and information provided by the Management Board of the RFC other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

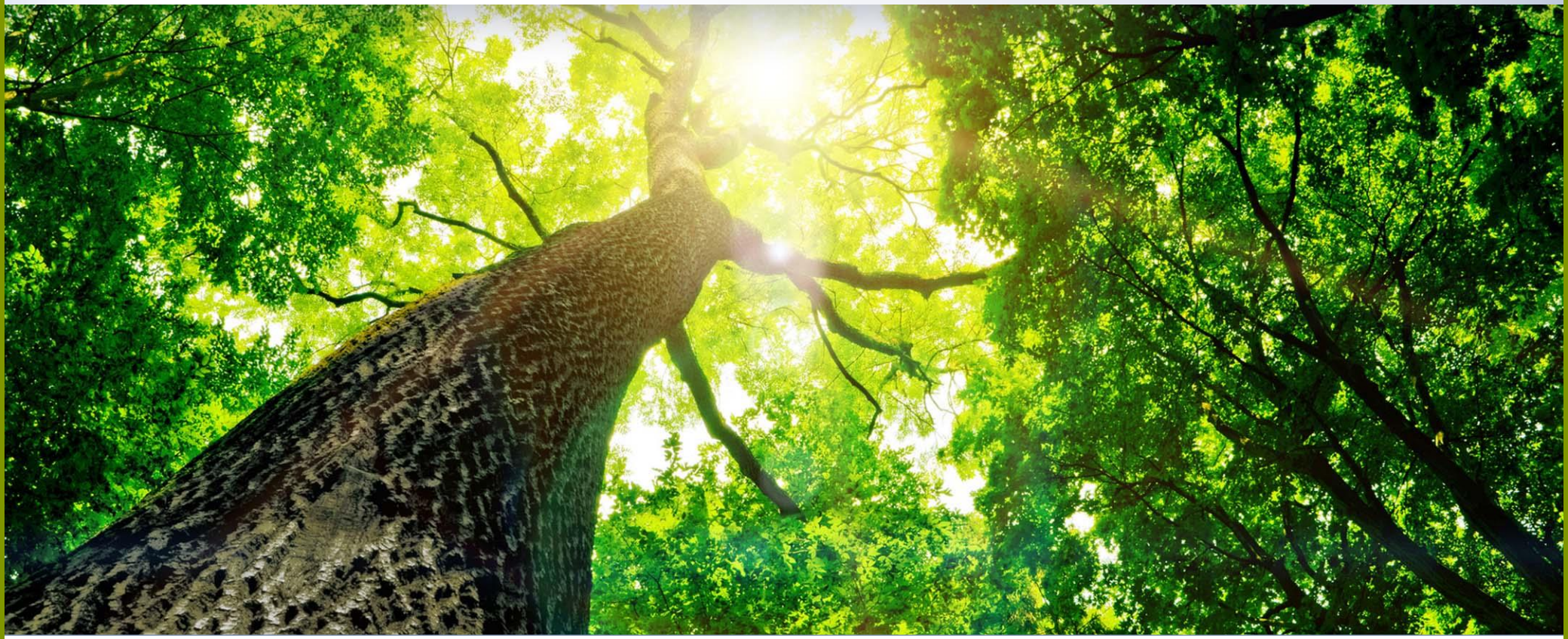
n = 22; 18; 14

Reasons for dissatisfaction with Overall RFC Communication || open question

marketmind

-report not really important, should include more operational topics/information relevant for RU's business

"If you are 'unsatisfied' or 'very unsatisfied' with any of the topics in this chapter, 'Overall RFC Communication', please specify the main reasons and your proposals and ideas on which subjects you would like the RFC to communicate more."



3 Sample Description

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Target Group

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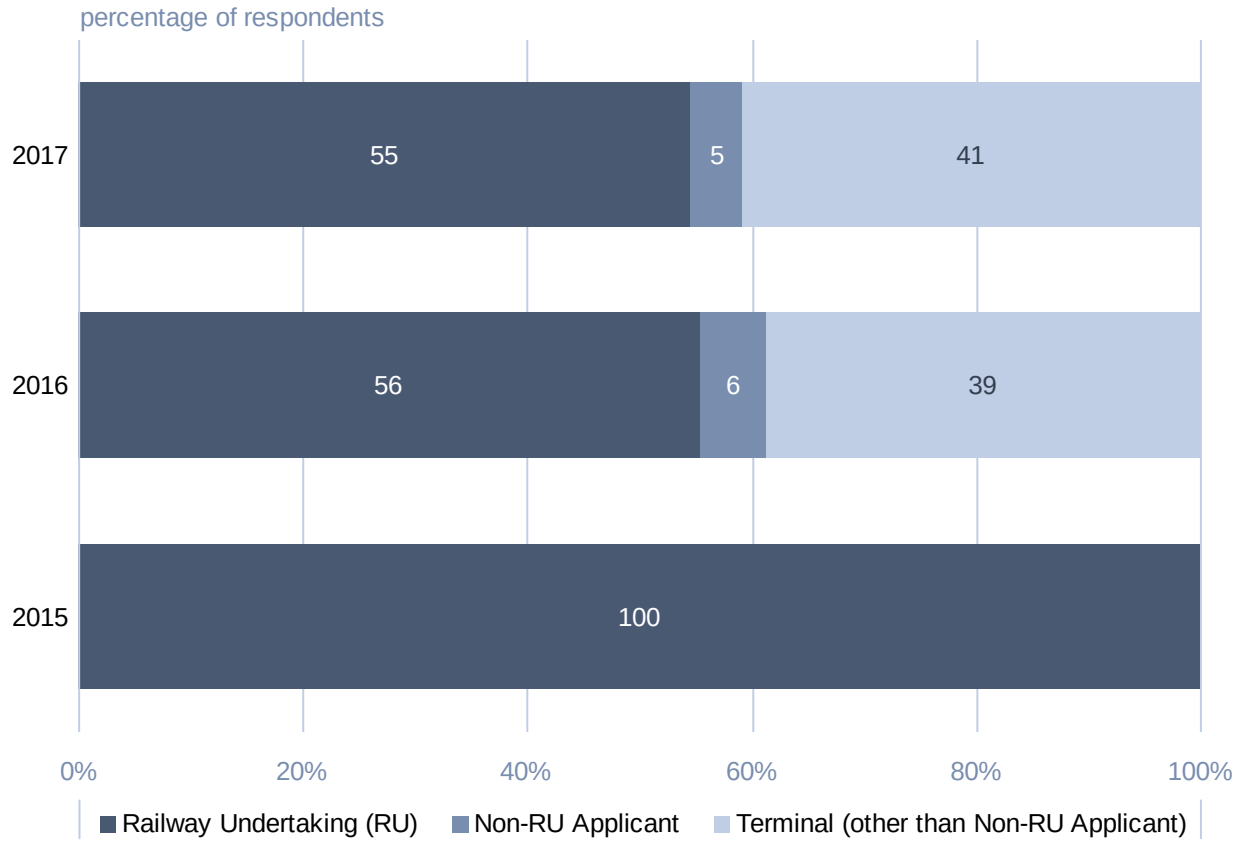

"To which of the following types of target groups does your company belong?"

n = 22; 18; 14 || non/potential users included

Usage of different corridor sections

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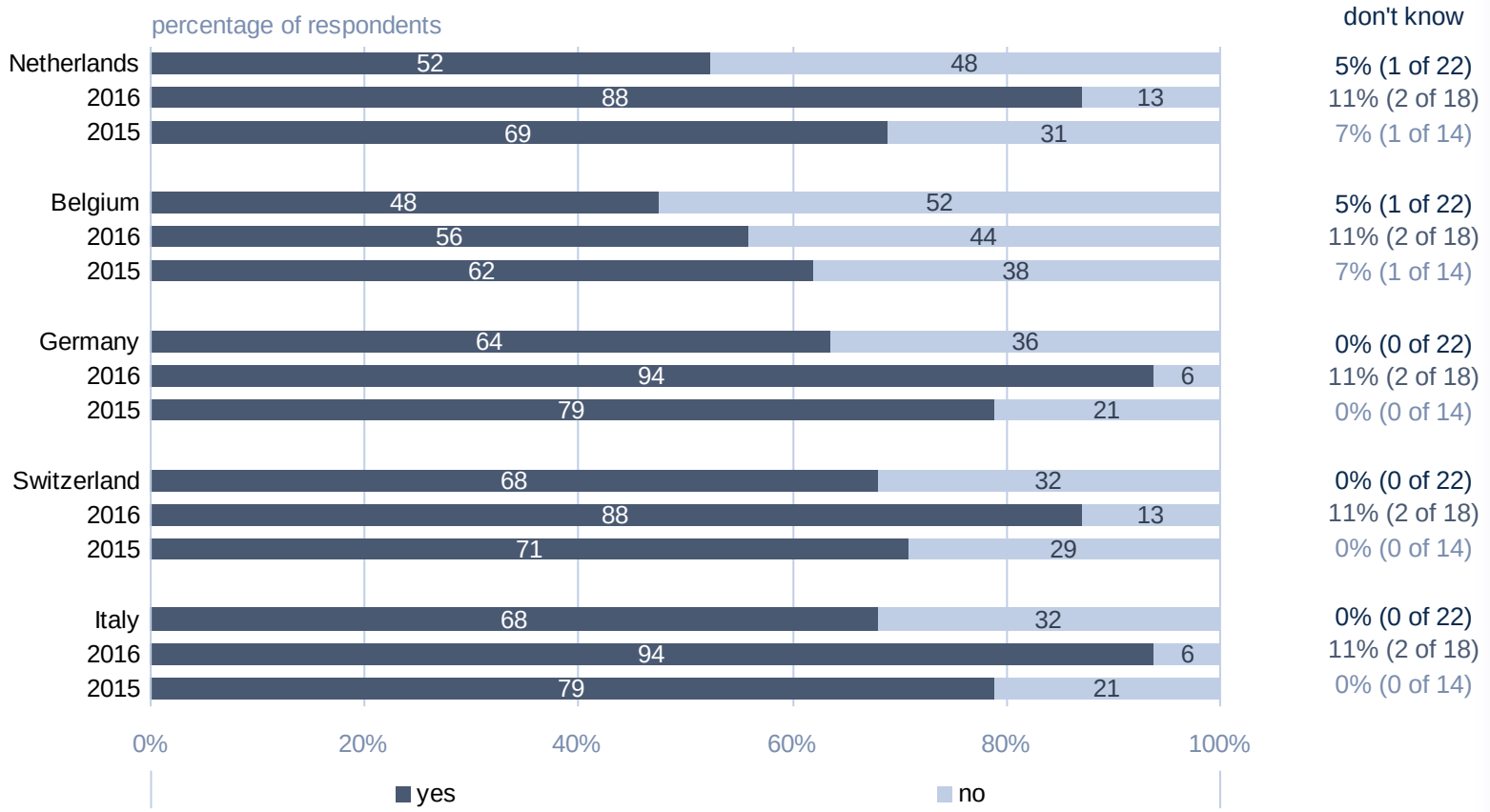
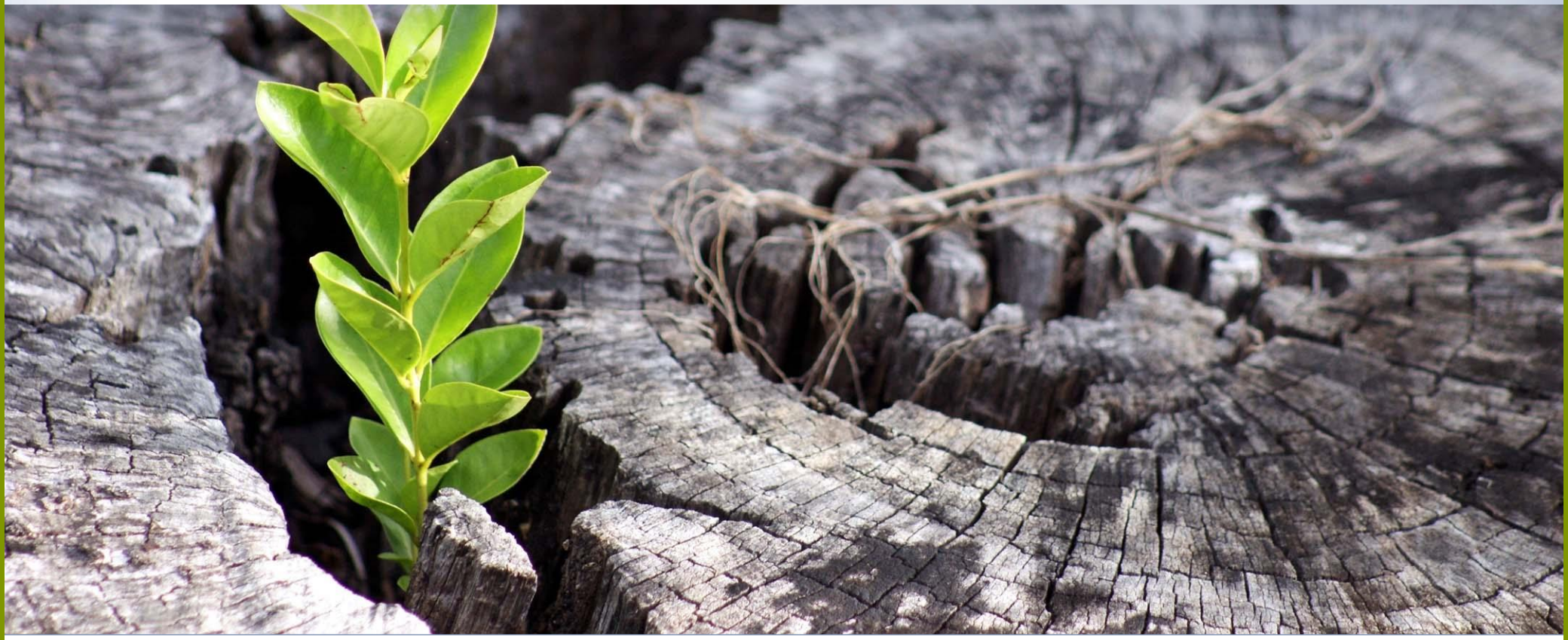


different scale in 2016/2015: daily/several days per week/weekly/monthly/yearly/never

"In which countries involved in the RFCs you have chosen before does your company operate/run international services?"

n = 22; 18; 14



4 Non/potential users

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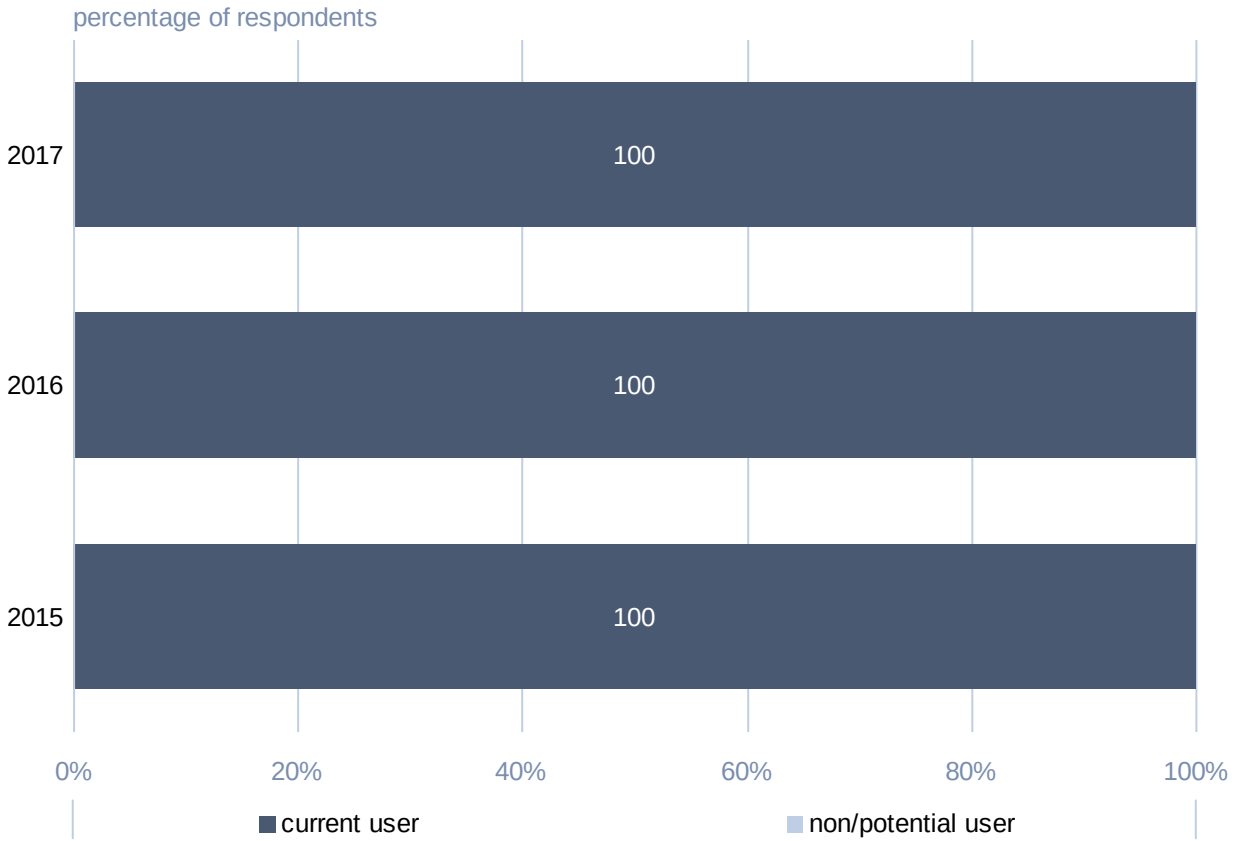
Users vs. non users



n = 22; 18; 14

5 Summary

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Summary - Satisfaction Rating

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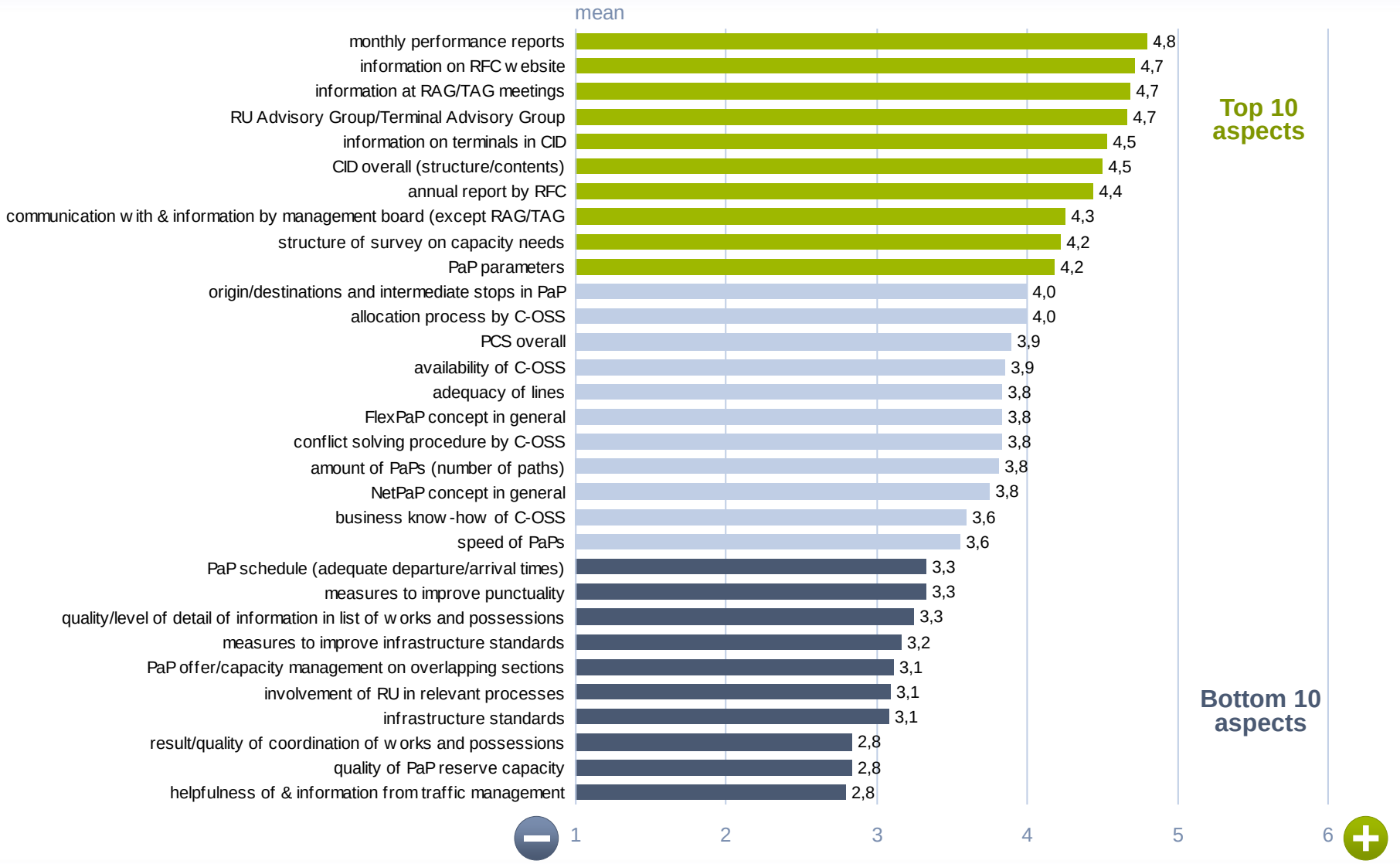

Summary - Satisfaction Rating

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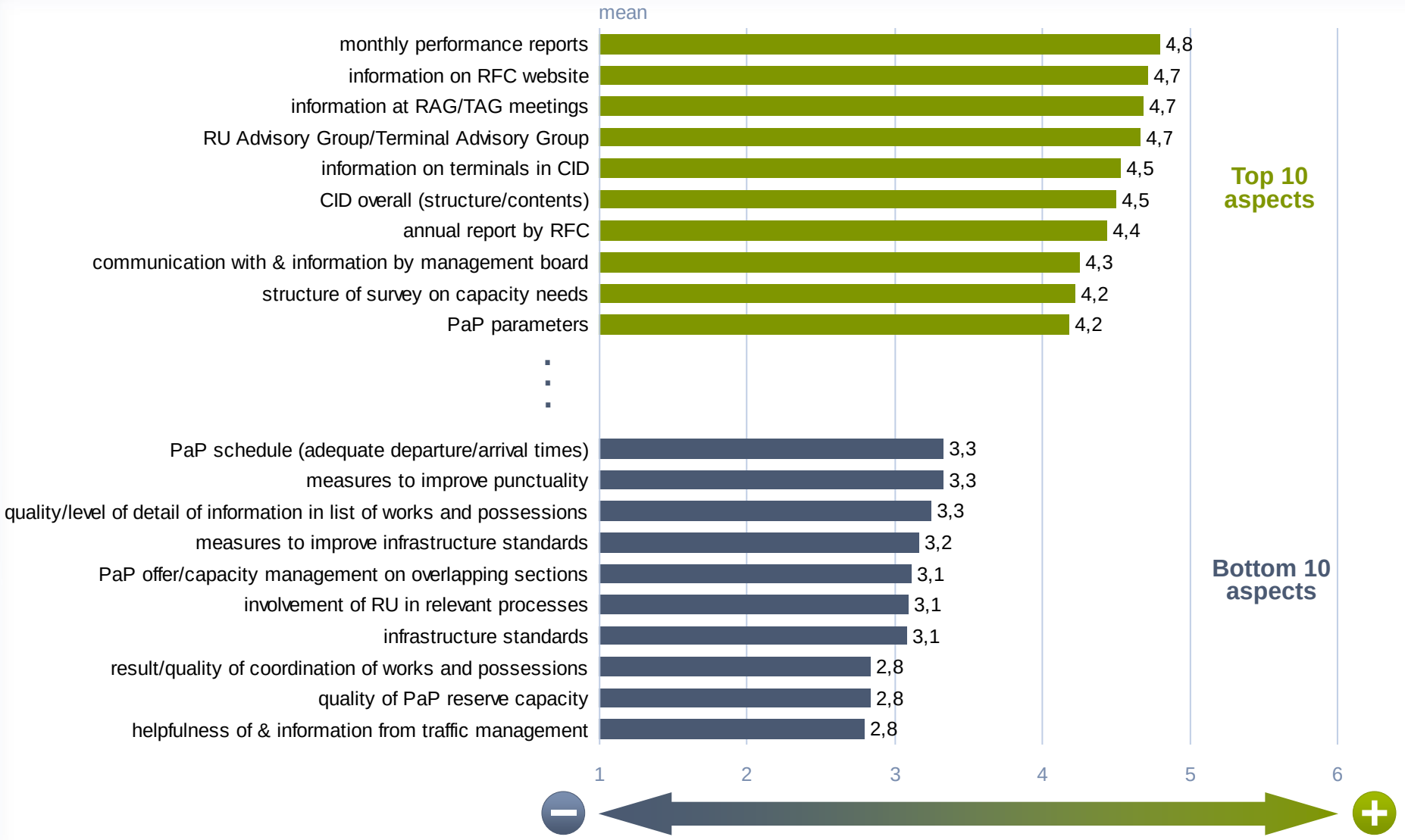

Summary - Satisfaction Rating || Comparison to 2016/2015 (1)

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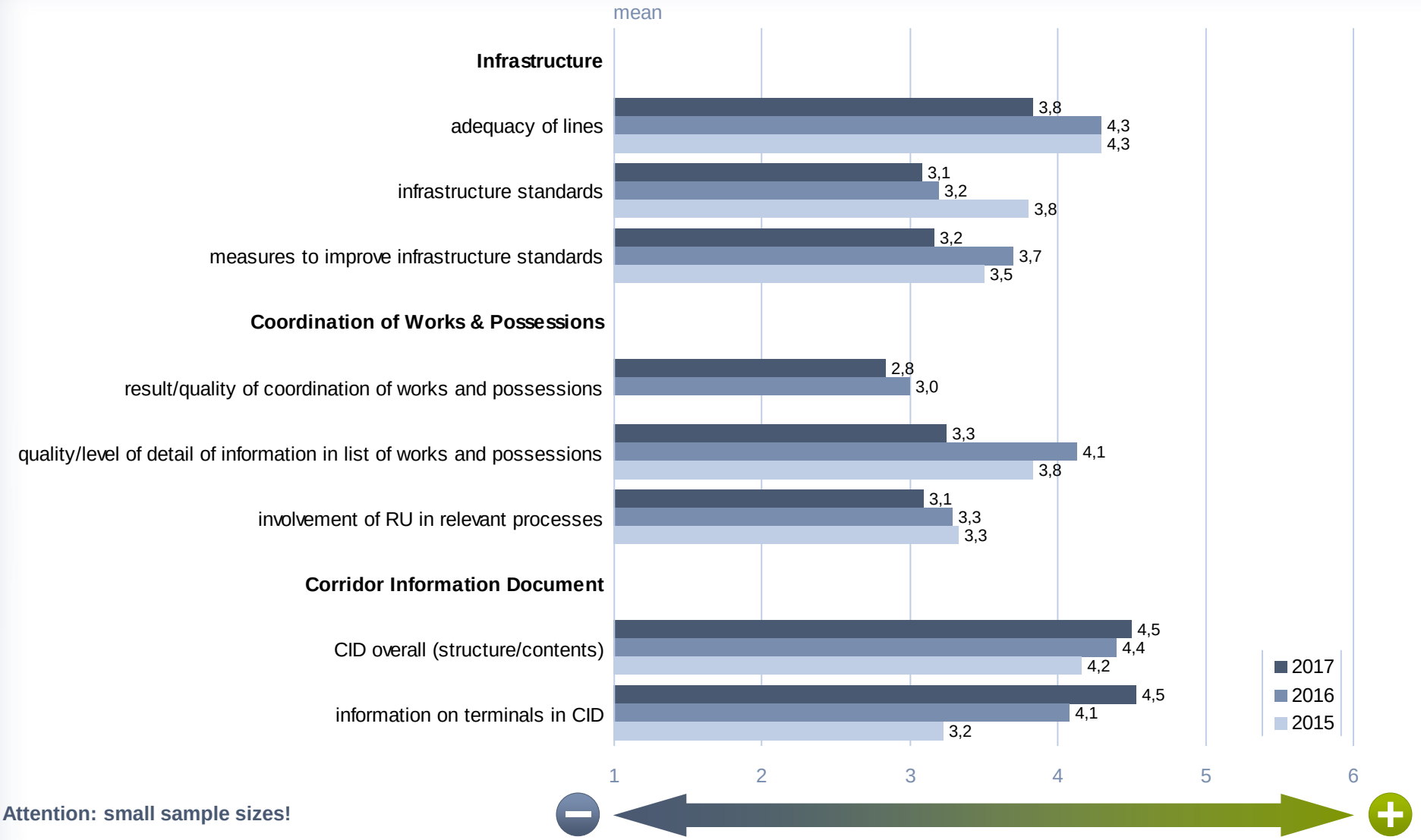

Attention: small sample sizes!

Summary - Satisfaction Rating || Comparison to 2016/2015 (2)

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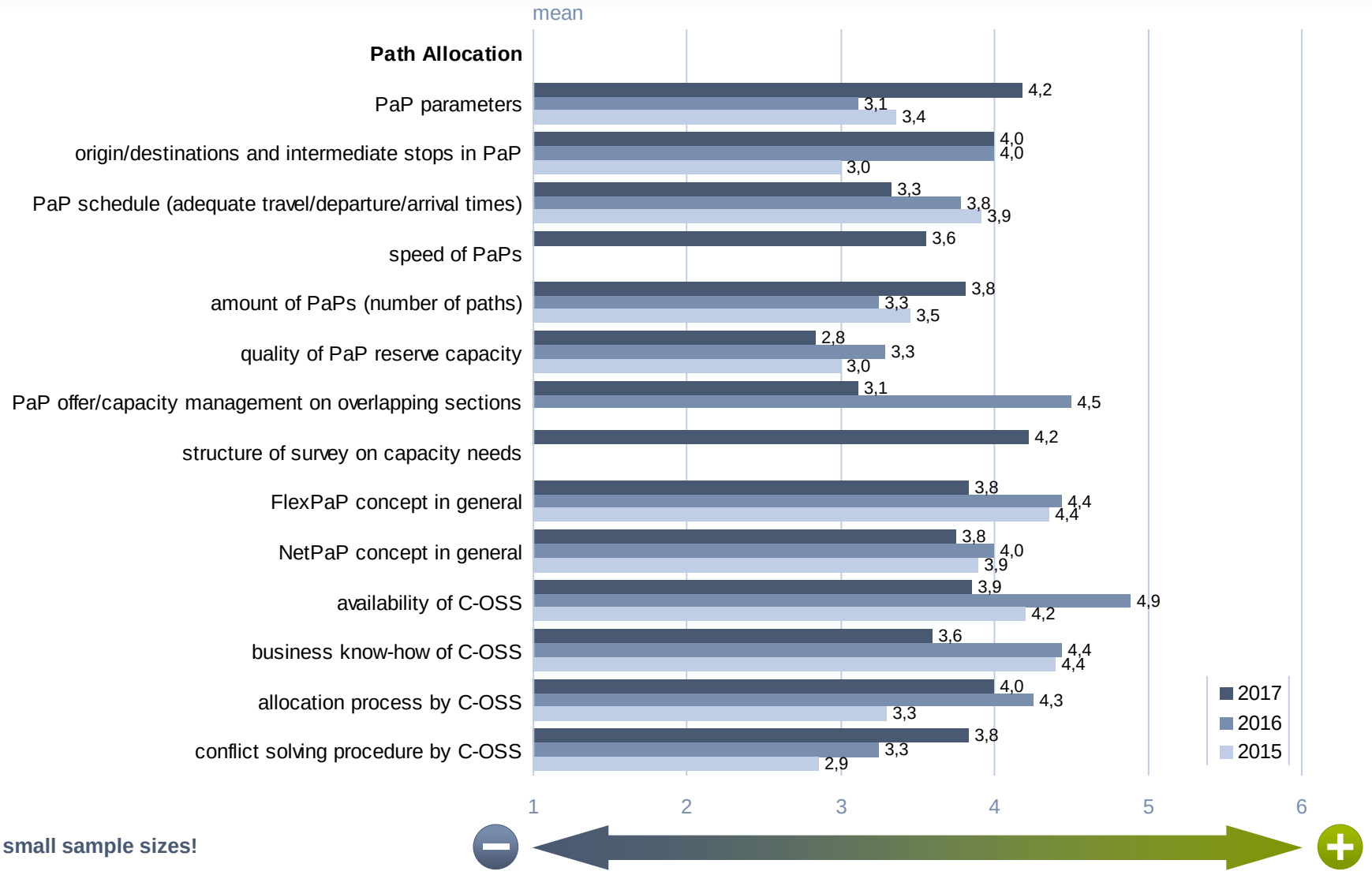
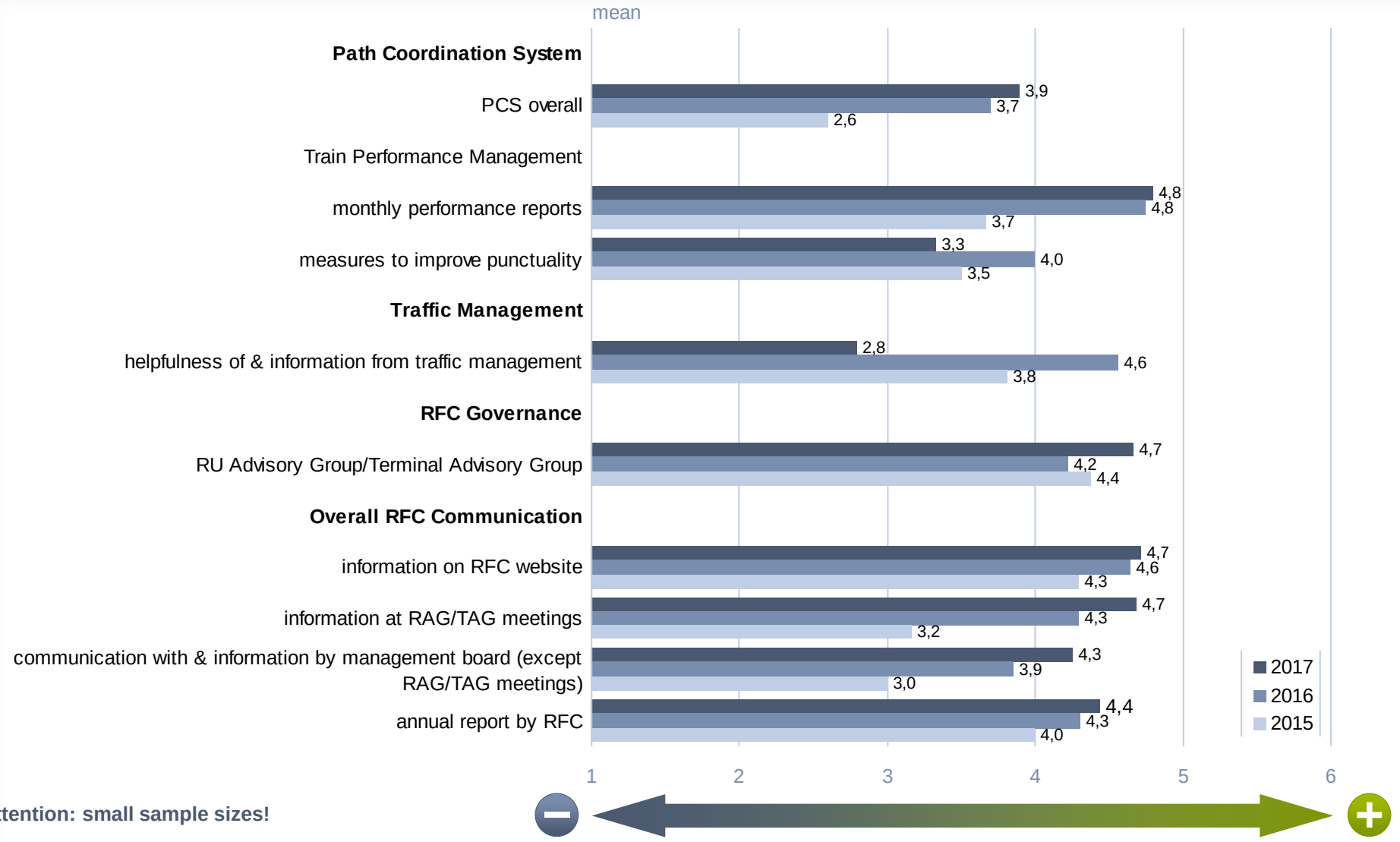


Attention: small sample sizes!

Summary - Satisfaction Rating || Comparison to 2016/2015 (3)

marketmind



Attention: small sample sizes!

Summary - Satisfaction Rating || Comparison to overall results (1)

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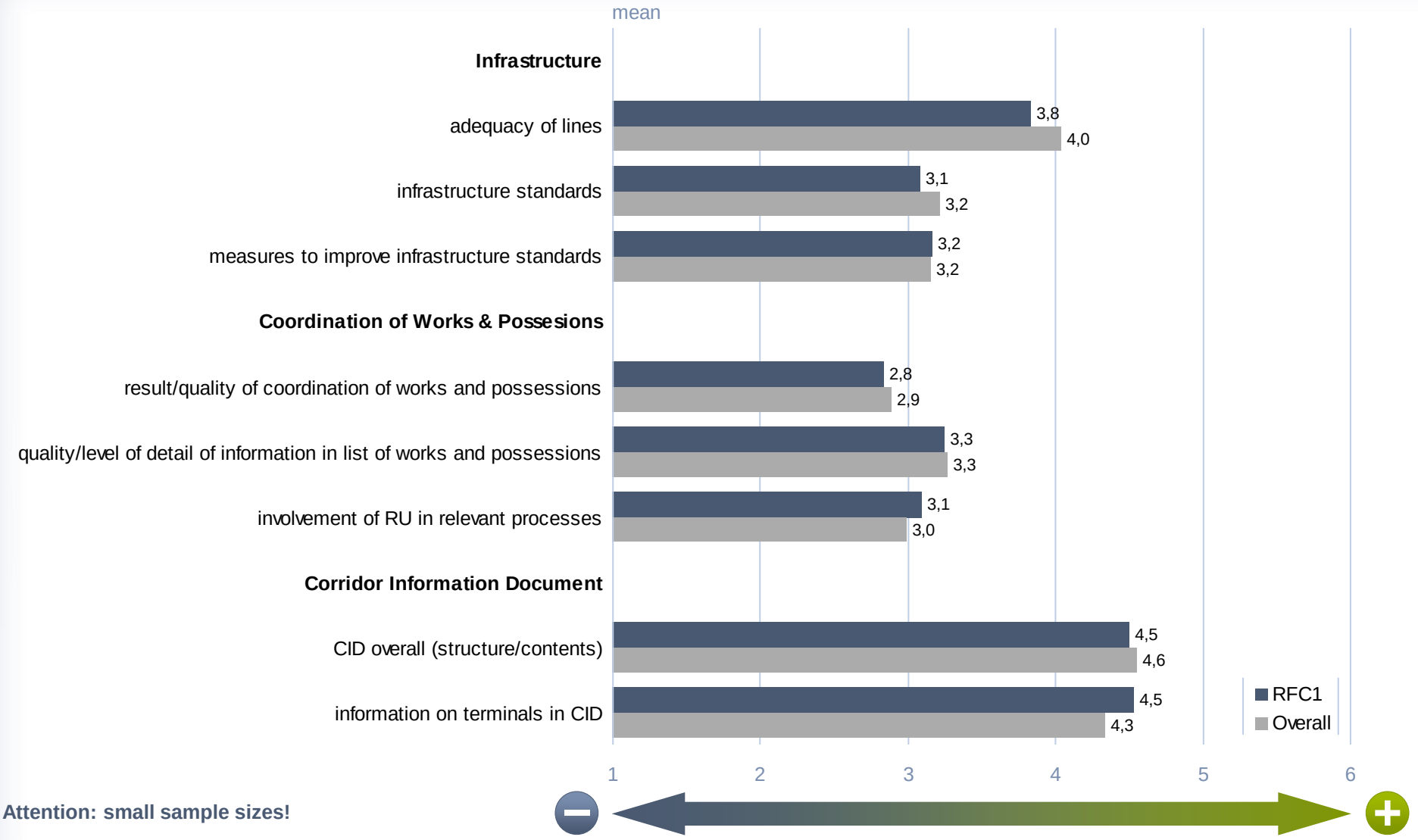
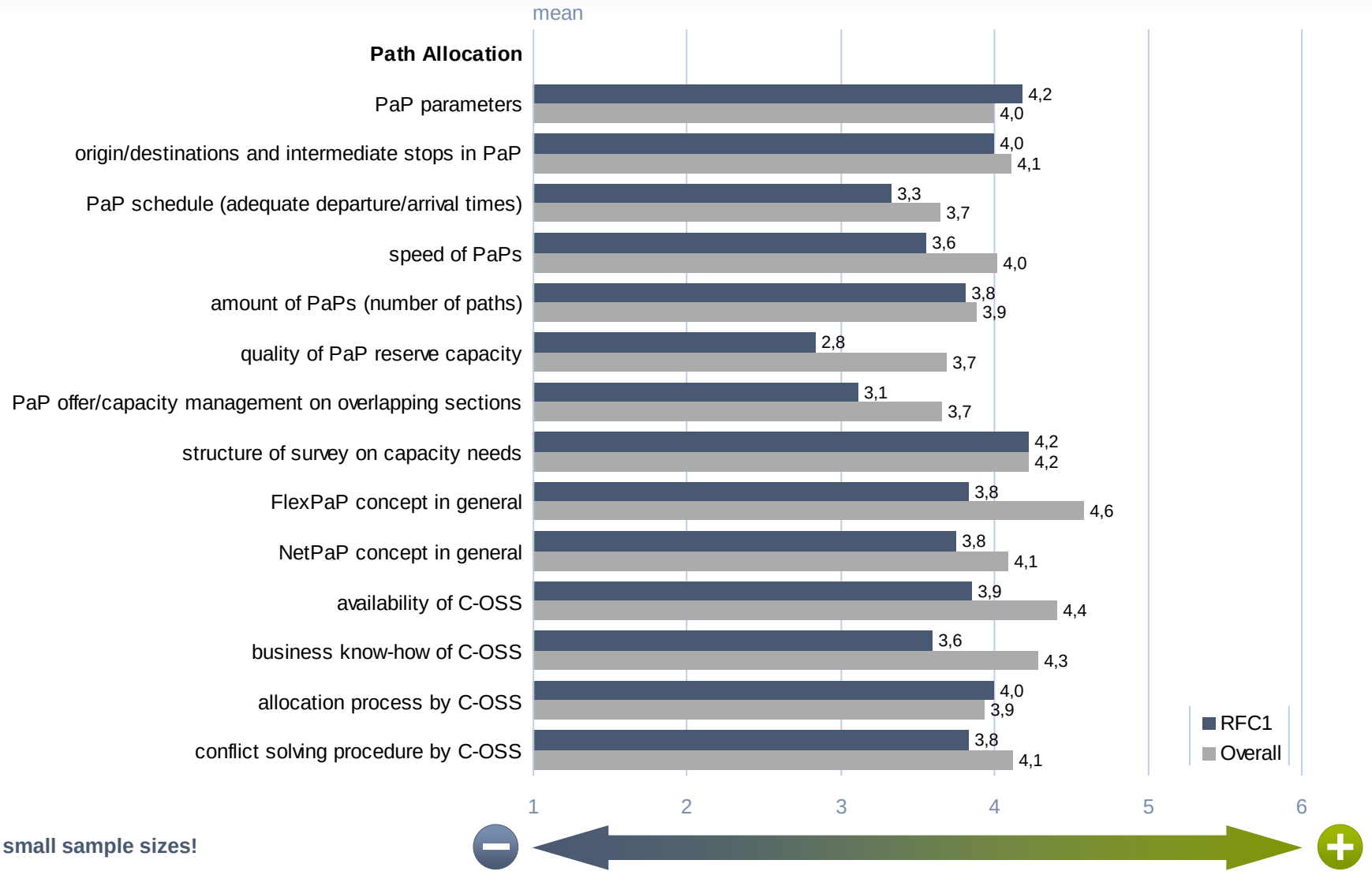


Attention: small sample sizes!

Summary - Satisfaction Rating || Comparison to overall results (2)

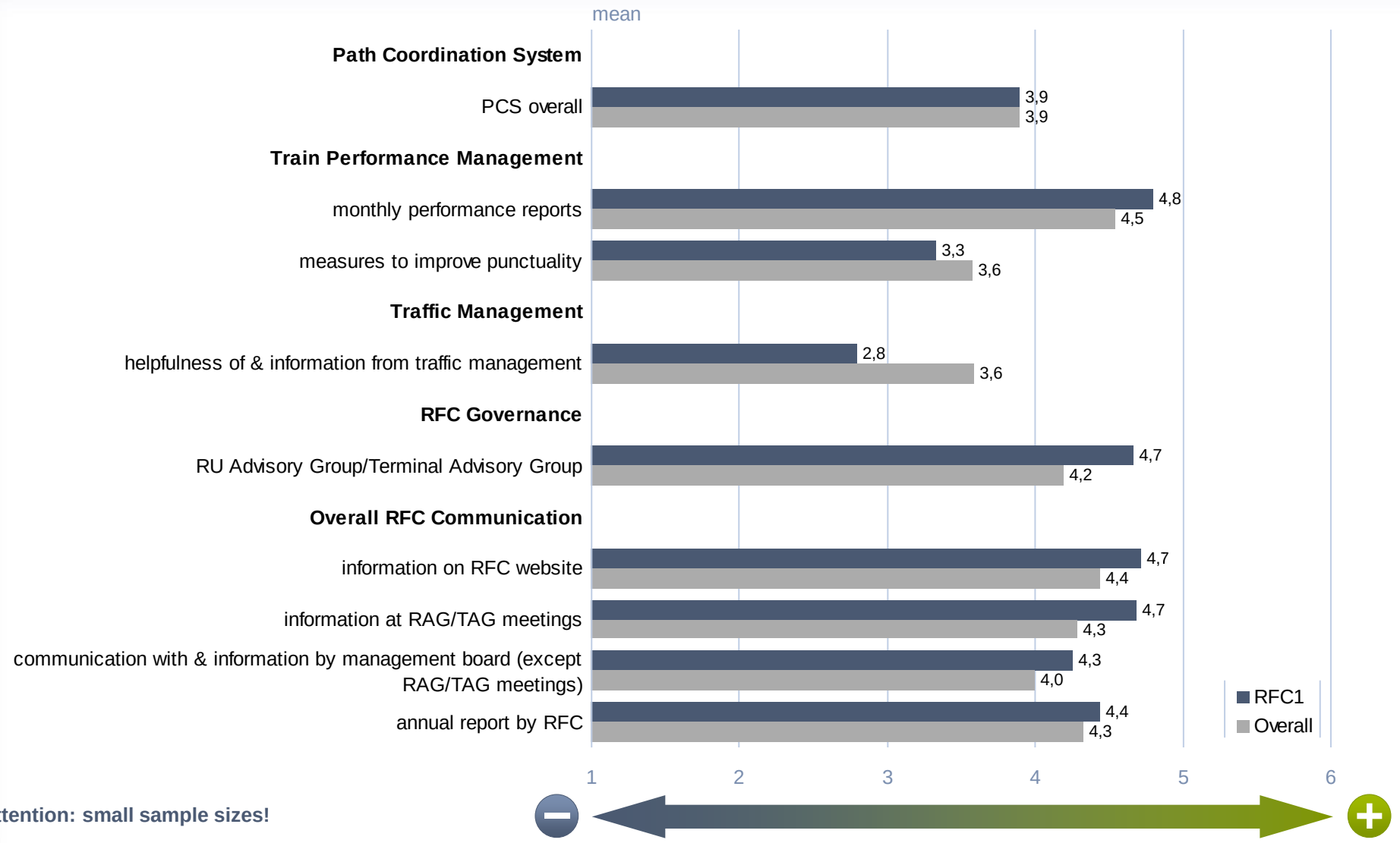
marketmind



Attention: small sample sizes!

Summary - Satisfaction Rating || Comparison to overall results (3)

marketmind



Attention: small sample sizes!

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