

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.





RFC User Satisfaction Survey 2016

Report for RFC 1



Co-financed by the European Union
Connecting Europe Facility

November 2016

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1 Study Design



18 respondents

18 RFC1 users / 0 non-users

15 full interviews / 3 partial interviews

10 nominated by RFC1 / 8 nominated by other RFCs

3 agreed to forward name

2 used topic-forward



Computer Aided Web Interviews (CAWI)



Contacts (e-mail address) delivered by RFCs



42 e-mail invitations sent



Field Phase: 13 September to 7 October 2016



2 Satisfaction with the RFC

foster the "how can WE get things done together" among corridor members

improve cross-border harmonization; speed up projects

mentioned in the PaP offer Meeting in Frankfurt

ministries should take over more responsibility to solve problems they are in charge of, like longer trains (financing of longer tracks)

one overall TAG Meeting for all corridors, this would ensure a coherent treatment of topics

please DON'T create more PaPs

the advantage of PAP towards national paths is still unclear/not given

a cross-corridor coordination and consultation process together with RU should be set up; an official body (e.g. Executive Board) should approve that process and eventually establish a regularly reporting

please harmonize the national network statements

secure financial investment independence for minor bottleneck eliminations

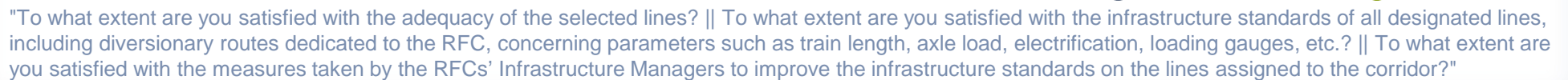
the contrast of flexible and various needs from the market towards a nearly fix PAP offer is probably a irresolvable structural problem (as long as long as non-discriminatory criteria are respected)

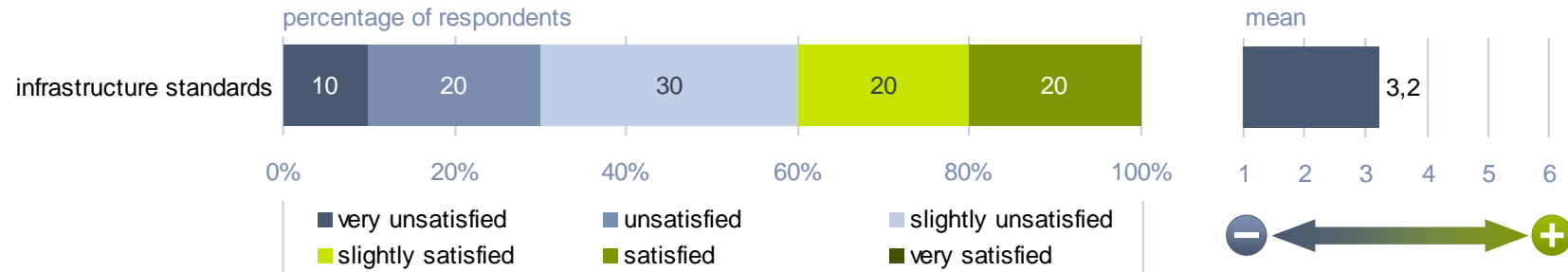
be more politically active to enhance interoperability and standardization along corridor

coach members of corridors on how to act to help corridor development

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."





very unsatisfied/unsatisfied

station Aachen-West: track length + direction change + tonnage limit

740m train length in Germany still missing and no reliable implementation plan until 2020

2000t train weight in Italy still missing and no reliable implementation plan until 2020

high profile in Italy

slightly unsatisfied or better

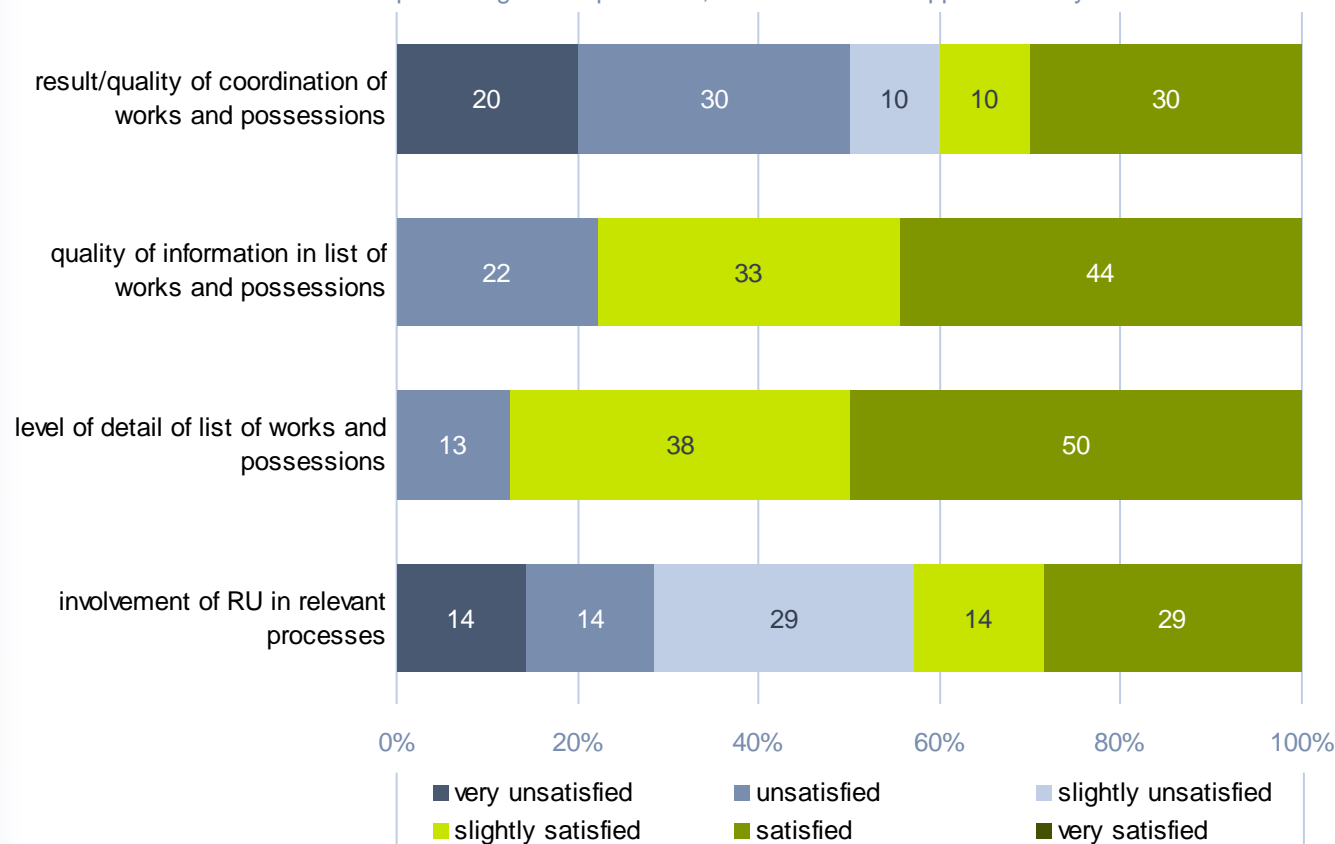
in Switzerland it is usual to operate trains with 2 or 3 engines in the mountains; this is not always good from infrastructure in definition of meters

train length of 740m is not possible

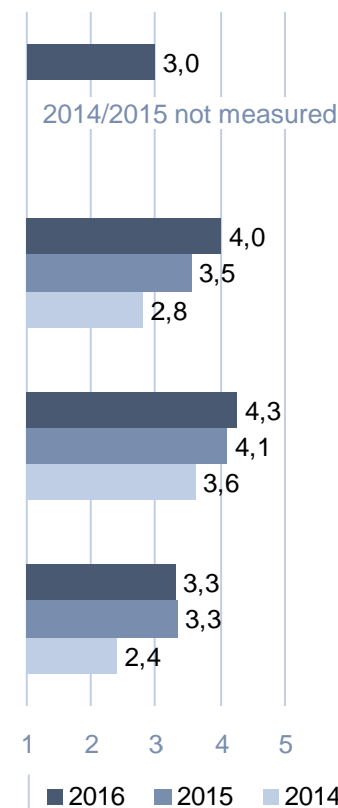
the overall limited/insufficient capacity is the most crucial issue on the infrastructure

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

percentage of respondents; RU and Non-RU Applicants only



mean



don't know

9% (1 of 11)

18% (2 of 11)

21% (3 of 14)

5% (1 of 20)

27% (3 of 11)

36% (5 of 14)

15% (3 of 20)

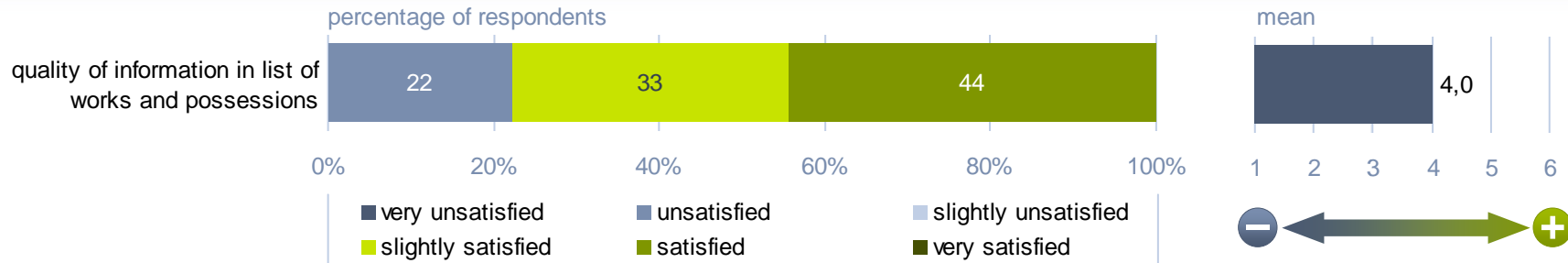
36% (4 of 11)

29% (4 of 14)

10% (2 of 20)

"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



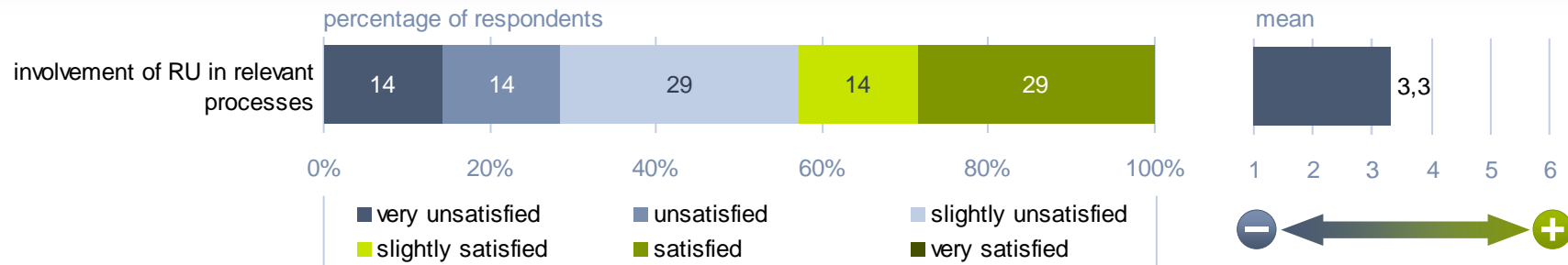
very unsatisfied/unsatisfied

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

we receive the information about construction works but without corresponding measures/alternatives; this is an essential information.

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?"



very unsatisfied/unsatisfied

the process agreed by RNE is not respected; we virtually cannot identify any process of coordination
we mentioned various times that the offered paths do not correspond with actual running products

closer coordination of IMs and sections of IMs to have one harmonized coordination result

good information from Swiss infrastructure

more and direct communications

offer existing trains

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

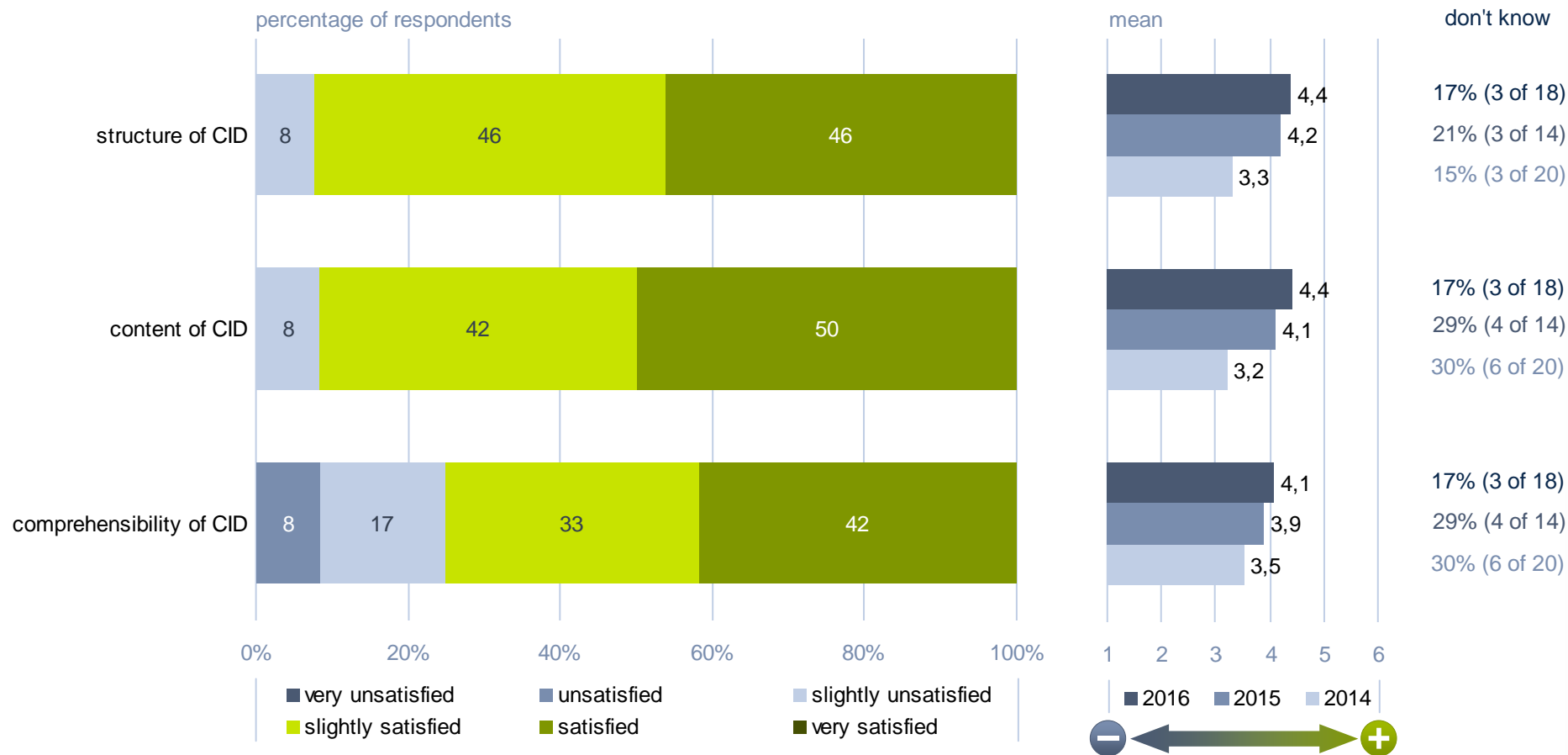
take into account capacities on potential alternative routes

taking care for the availability of alternative lines

educate coordinators in customer needs more thoroughly

get CH to offer handmade solution and not only kick back in KAT-procedure

Satisfaction with Corridor Information Document (CID)



"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?"

add large construction projects leading to reduced capacity (e.g. Luino line 2017)

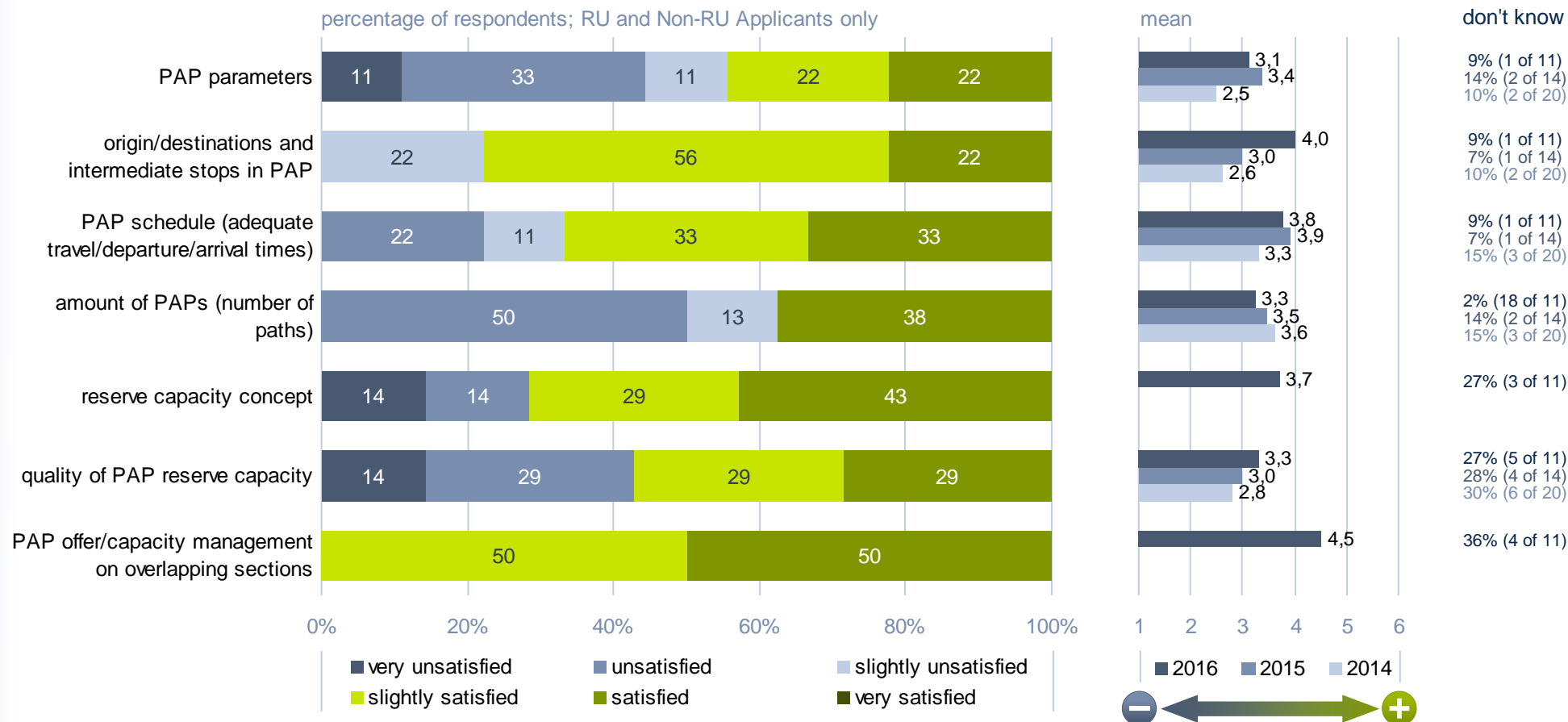
complete trains 1-7 in all countries

harmonized CID among all RFCs and in line with national rules

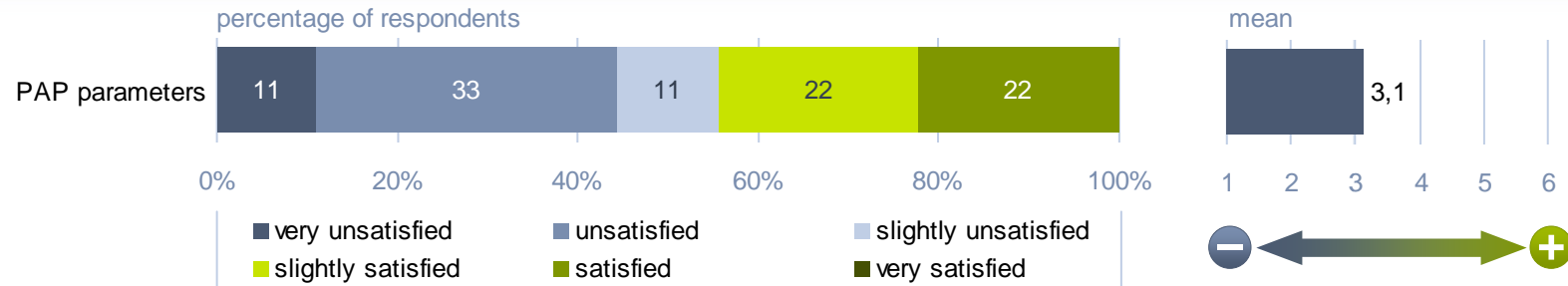
more and direct communications

optimize the information about construction works

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



"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

P400 in IT

infrastructure parameters reflect the least common denominator

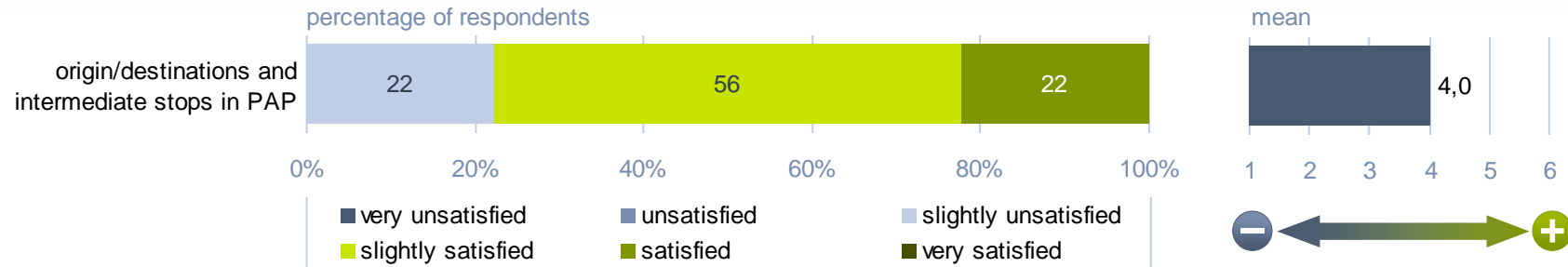
PaPs are basing on currently blocked capacity by a running traffic - means who wins a PaP is hitting a running traffic out of the production model

there are situations with 2-3 engines in the mountains; these meters with 2-3 engines are not implemented in the PaP

for discriminatory reasons it is not allowed to create customized PAP for RU. The result is an average which is not suitable for the RU anymore

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

origin/destinations and intermediate stops in PAP || criticism/suggestions || open question

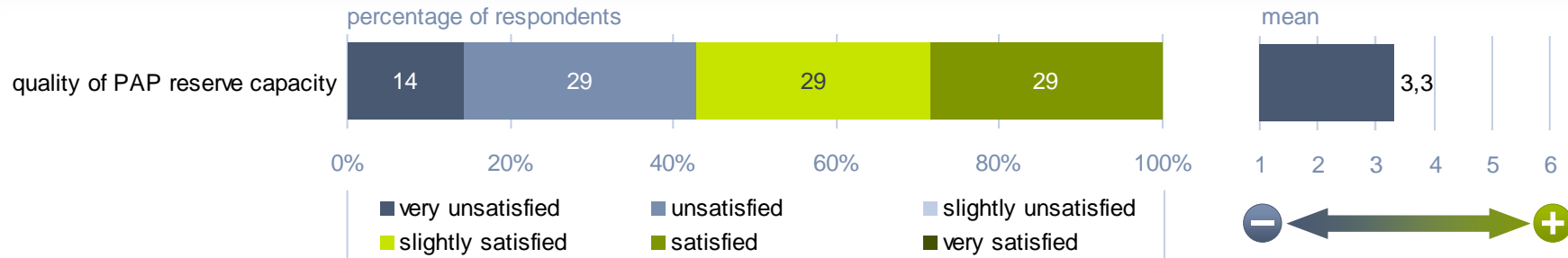


slightly unsatisfied or better

a PAP is always a compromise compared to customized solutions

the needs between the RU are very (too) different to create an offer which suits everybody

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



very unsatisfied/unsatisfied

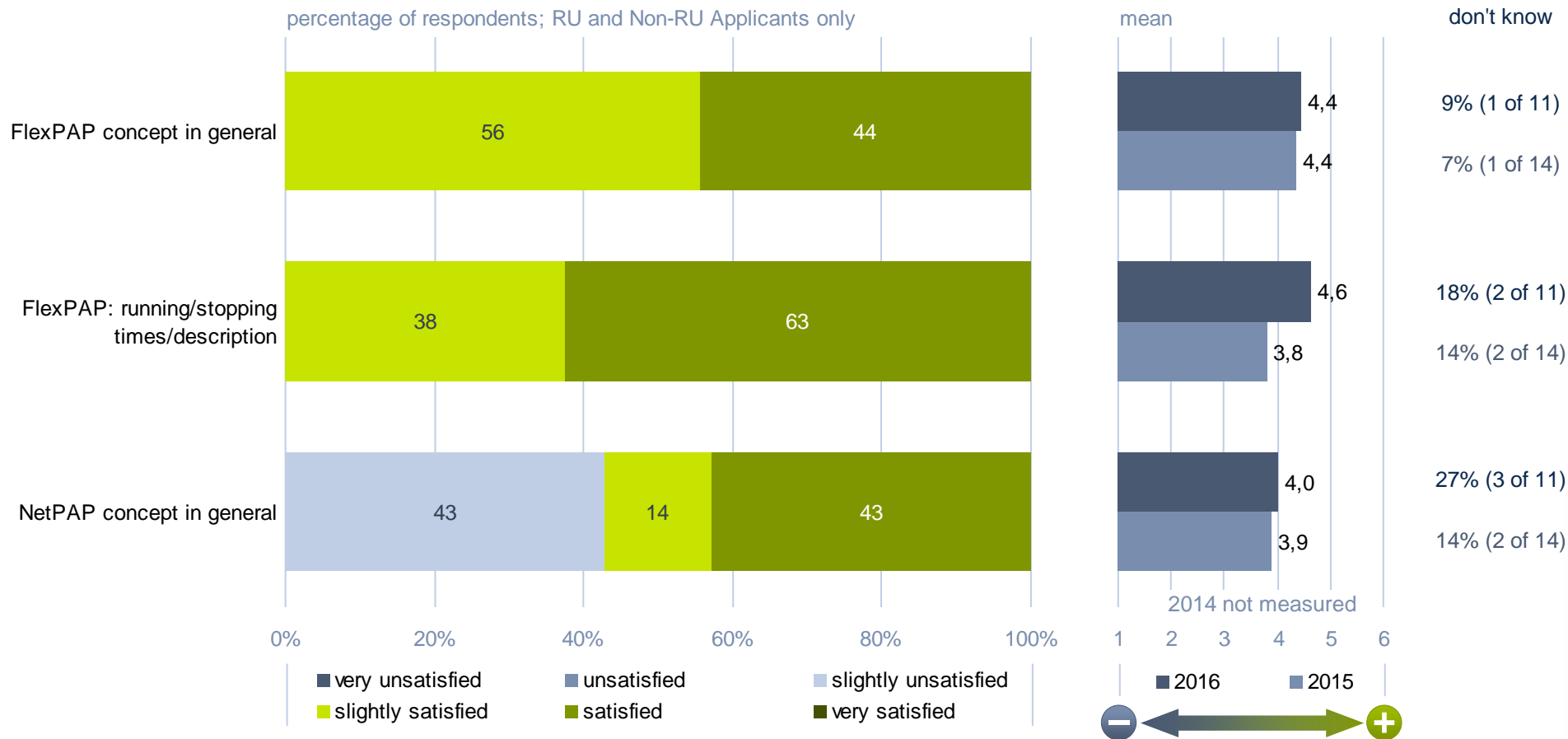
current approach for Reserve Capacity does not reflect the real needs

the approach with national requests is more efficient (RFC would only be one more player in the process)

despite of the work of the RFC during some months, there was still no harmonized offer of train paths

PaP ad hoc capacity block Swiss national traffic

"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? || ... with the Net-PaP concept to influence / improve the priority value of your PaP request in case of conflicts?"



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concentrate on creating additional traffic, not on changing running systems

make C-OSS more than just an interface

more transparency in the allocation of PAP

see topics of the workshop

the situation with Luino and the switch to Simplon is not coordinated well between infra and RFC

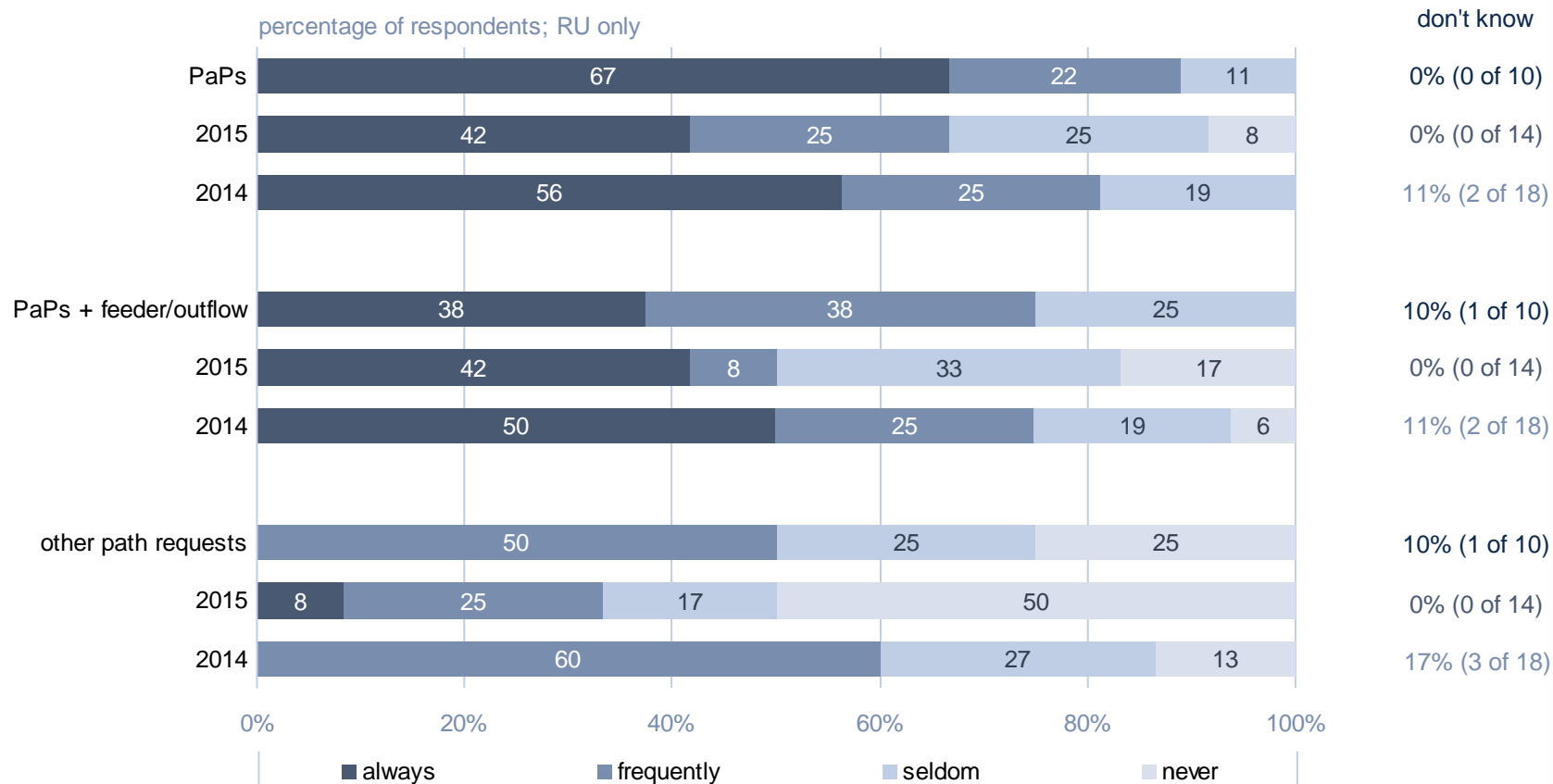
PAP only interesting for short term needs; yearly timetable prefers a customized solution

publishing of really available capacity for new traffics

reduce incentives for ordering more PAP than necessary (result of allocation formula)

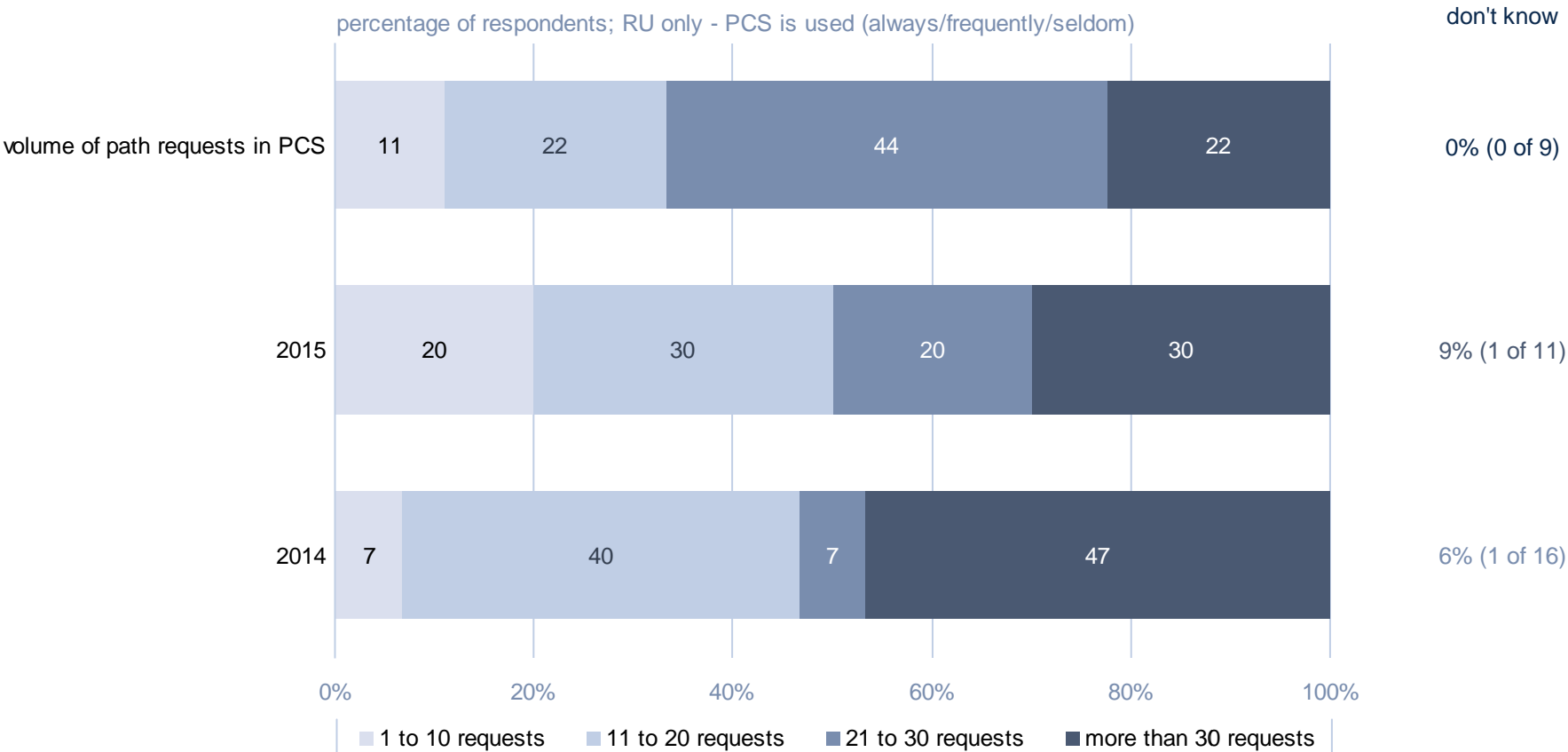
reduce the discrimination of short-distance traffics (result of allocation formula)

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



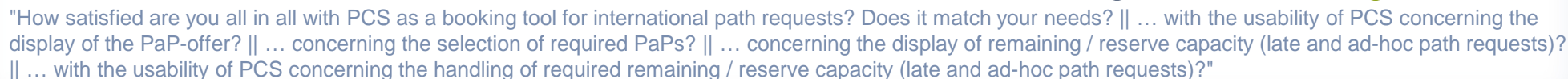
"How often does your company use the PCS booking tool for international path requests?"

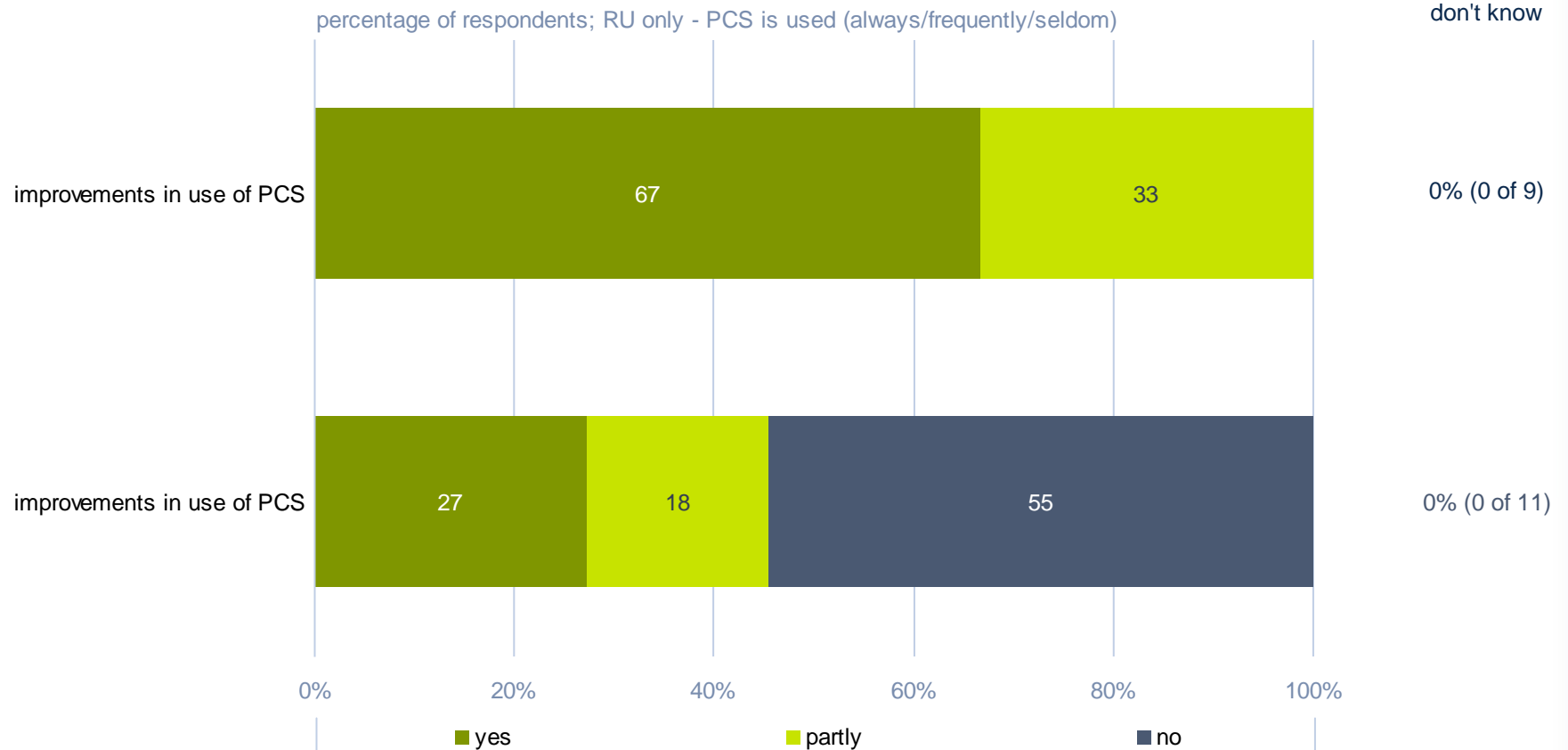
n = 10; 14; 18



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

n = 9; 11; 16





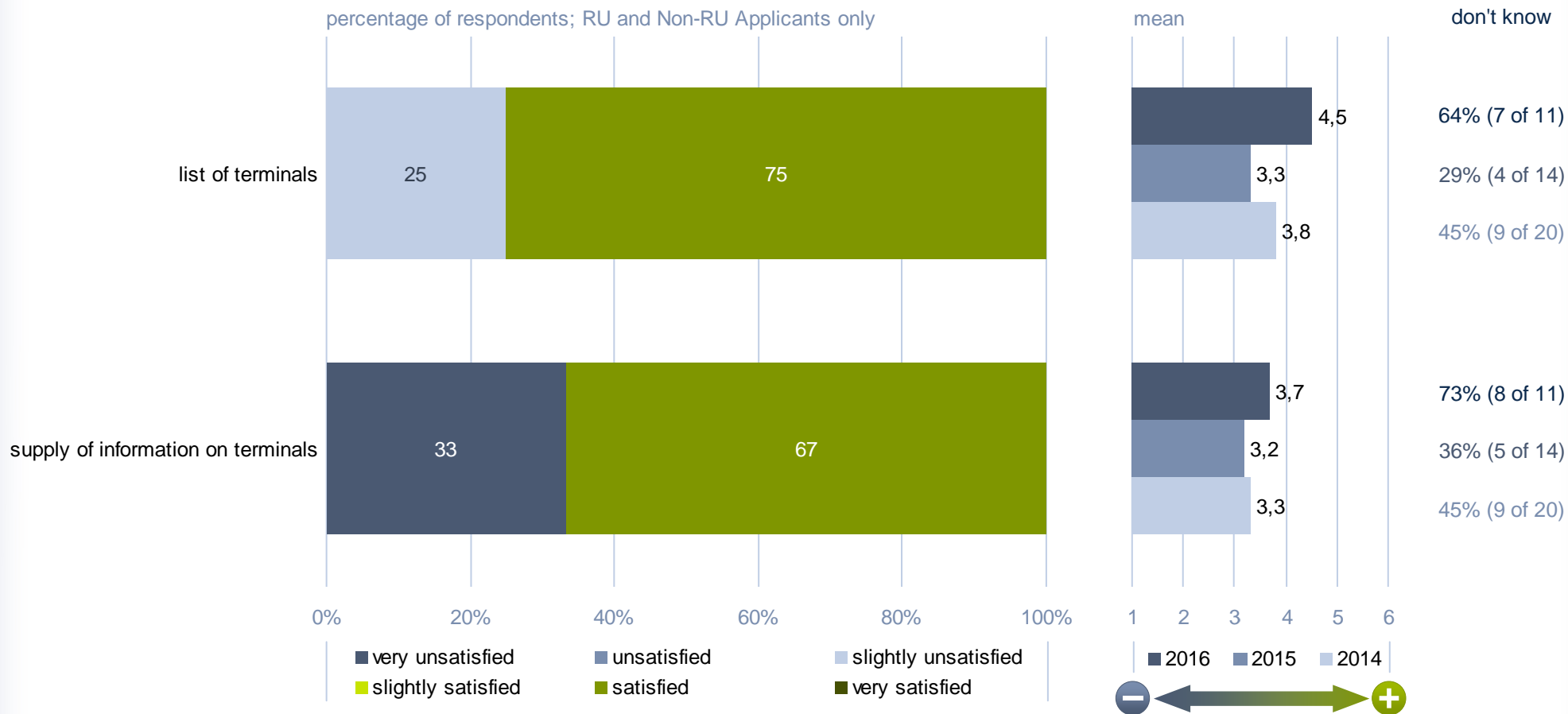
"On 25 January 2016 RNE released an overhauled version of PCS ("PCS Next Generation"). The new system is based on modern standards, its goal being to increase usability. Have you perceived any significant improvements in the use of PCS compared to the previous year?"

make PCS less complicated and more user friendly (more efficient for entering)

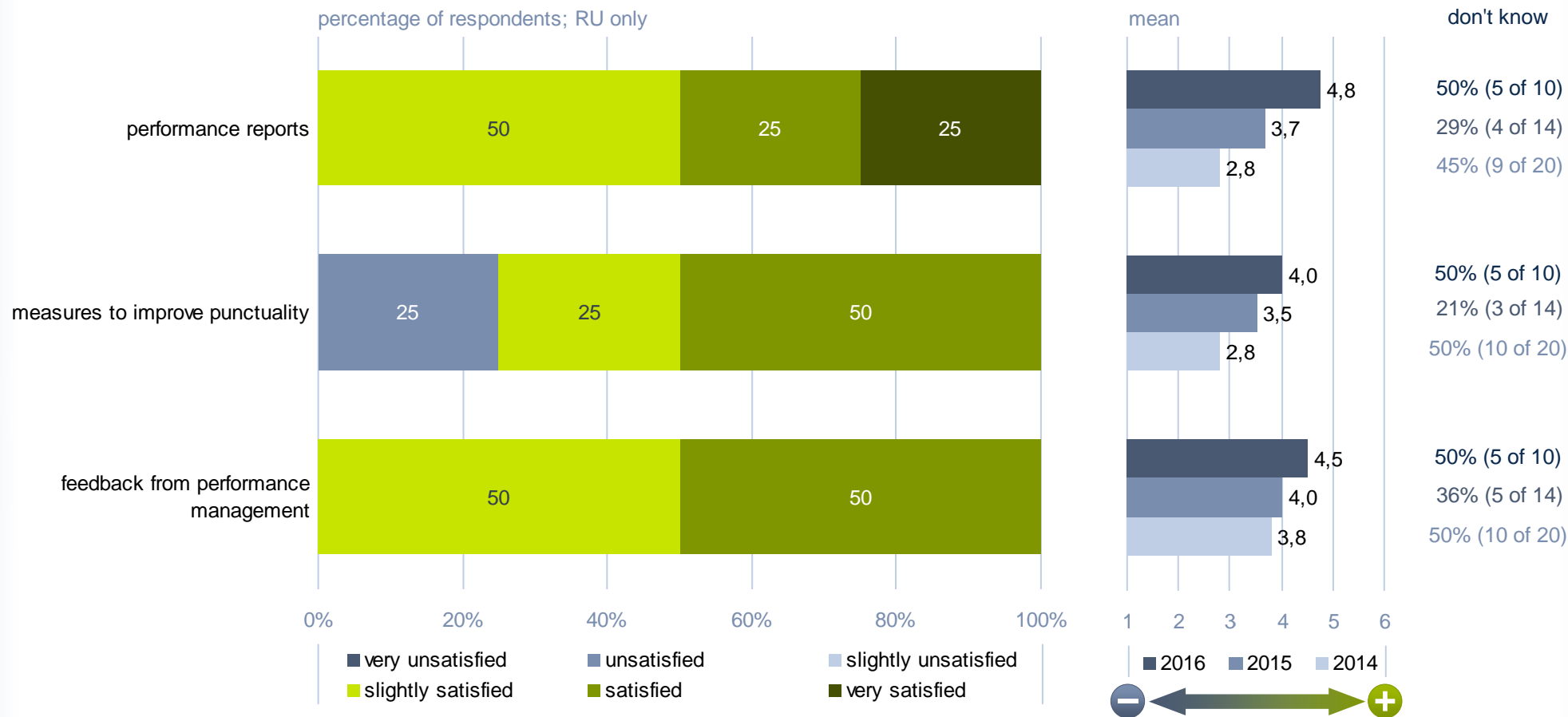
create one interface, make national requirements obsolete

make available for ordering process as well as carrying out the planning itself

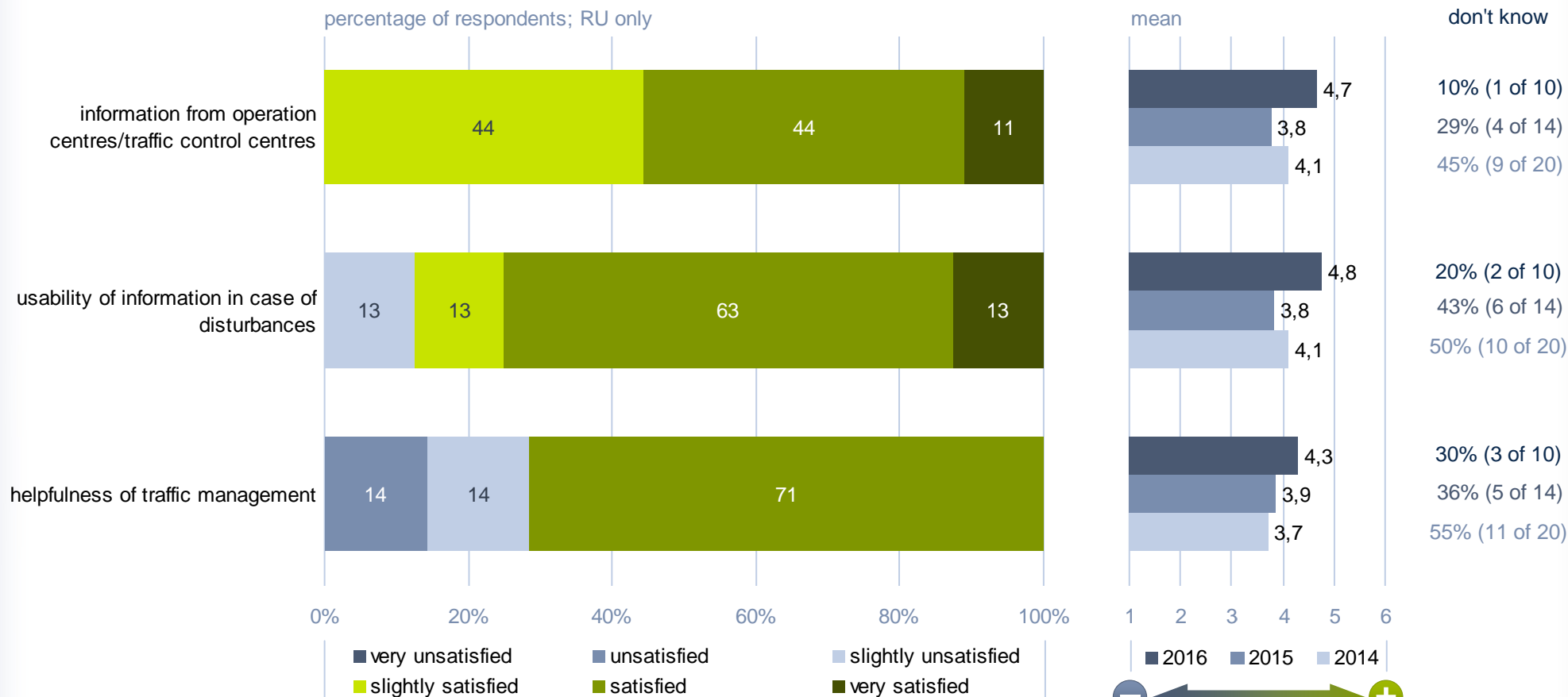
"Do you have any ideas for improvement to PCS?"



"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)?"

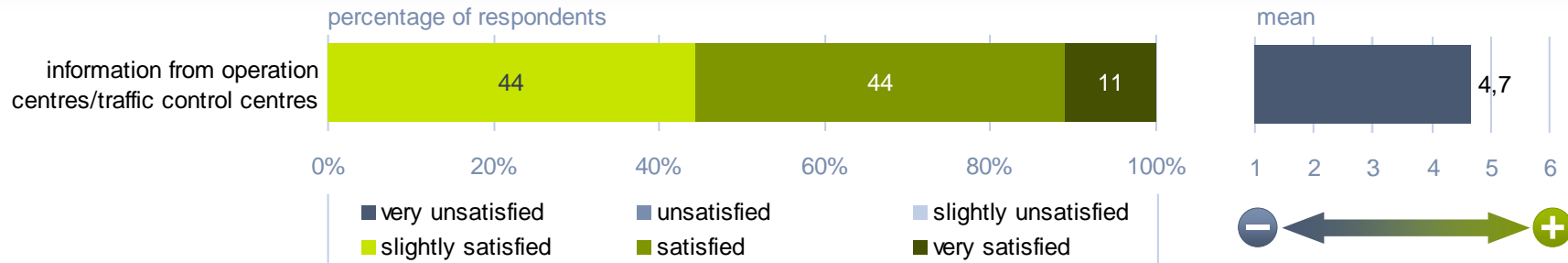


"How satisfied are you with the performance reports? Do they show the information you need? || How satisfied are you with the efficiency of measures taken in order to improve punctuality? || How satisfied are you with the feedback you receive from your whole RFC performance management team (if it exists) / train performance management? The RFC performance management team evaluates the punctuality of your trains and reports it back to you."



"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



slightly unsatisfied or better

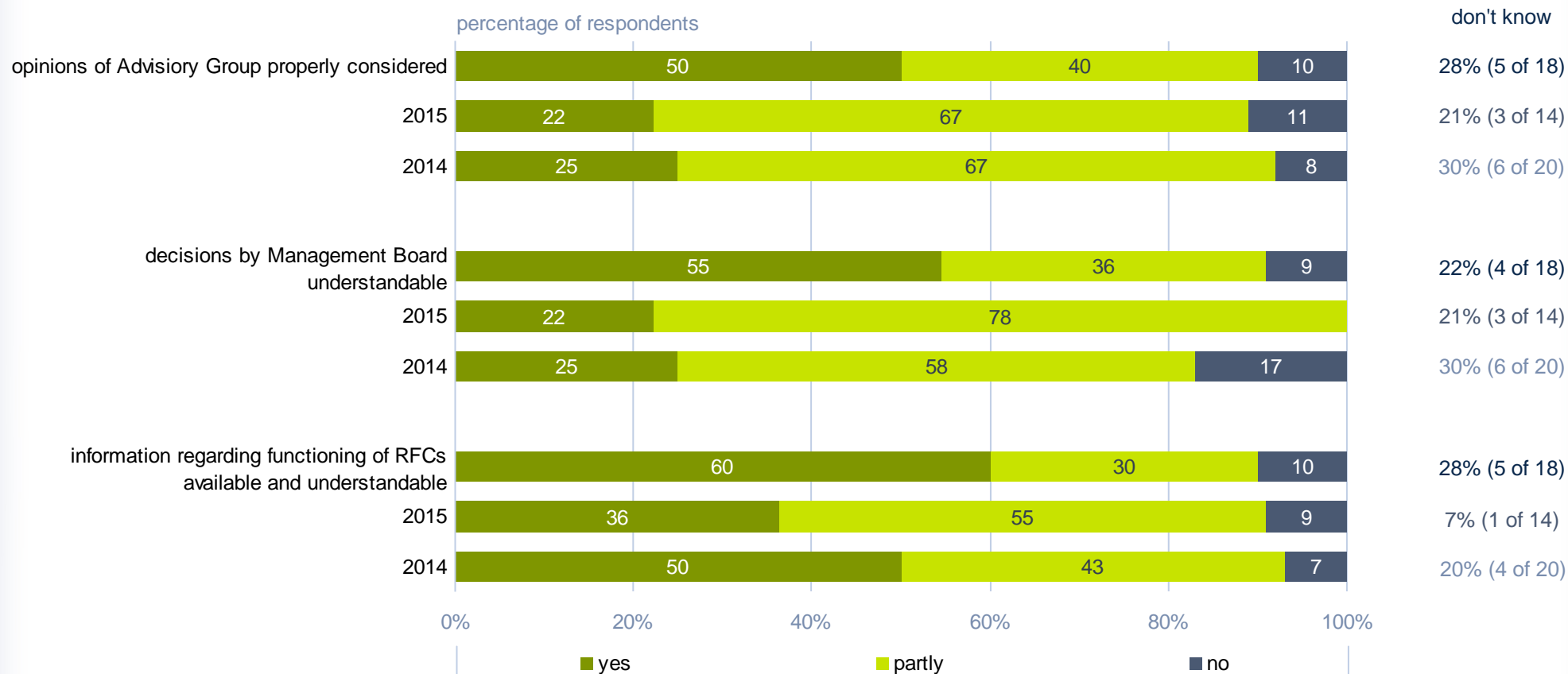
more reliable and quick information regarding ETA - > to final destination

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





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?"

active, business related use of the existing working groups

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.

past steps of 1 pagers and action list have been good

possibility to have an agenda point in the management board meeting

active business partnership

coordination of works with corridor RFC2 should be taken into account

improve feedback loop - especially in between meetings

coordination of implementation of capacity issues, long and heavy trains should be clarified between Belgium, Germany, Switzerland and Italy

more transparency of current activities and status of ExB/MB for RAG/ TAG

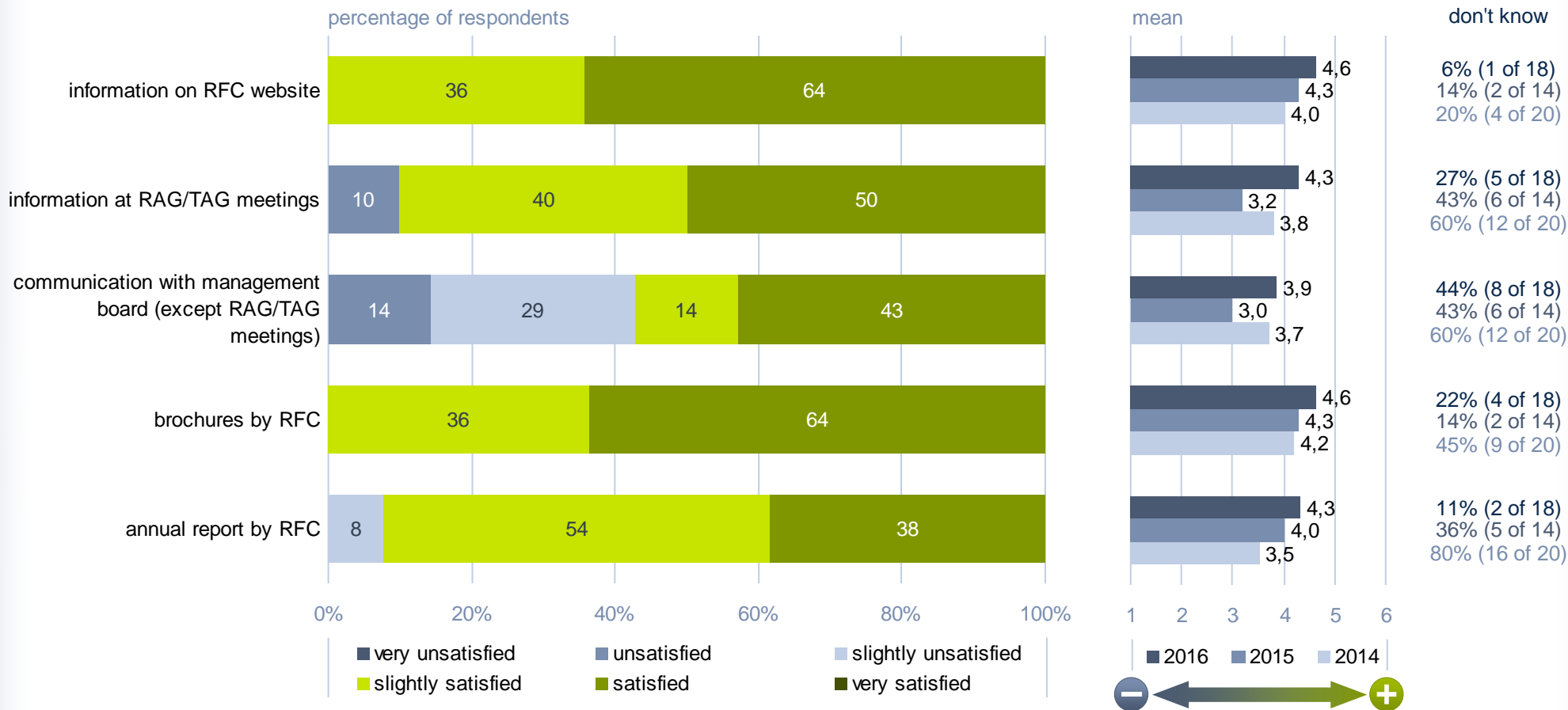
ERTMS developments to be aligned along the corridor

use mediums of video telcos

design/construct customer information platform more user friendly/up to date

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

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)

communication is useful, but focus on results, communication comes in a second step

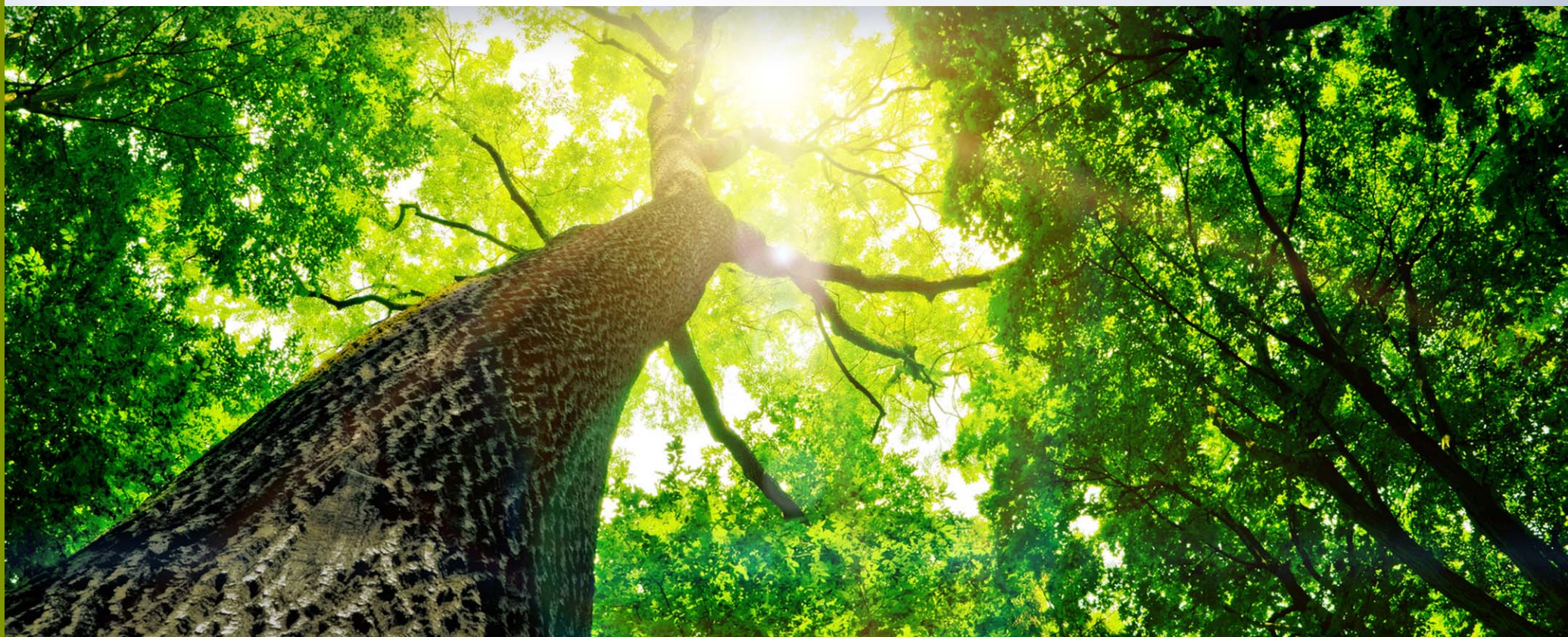
monitor of pending issues regarding where what is blocked, why and what are next steps

monitoring of relevant issues concerning the corridor, discussed at the commission/ other committees etc.

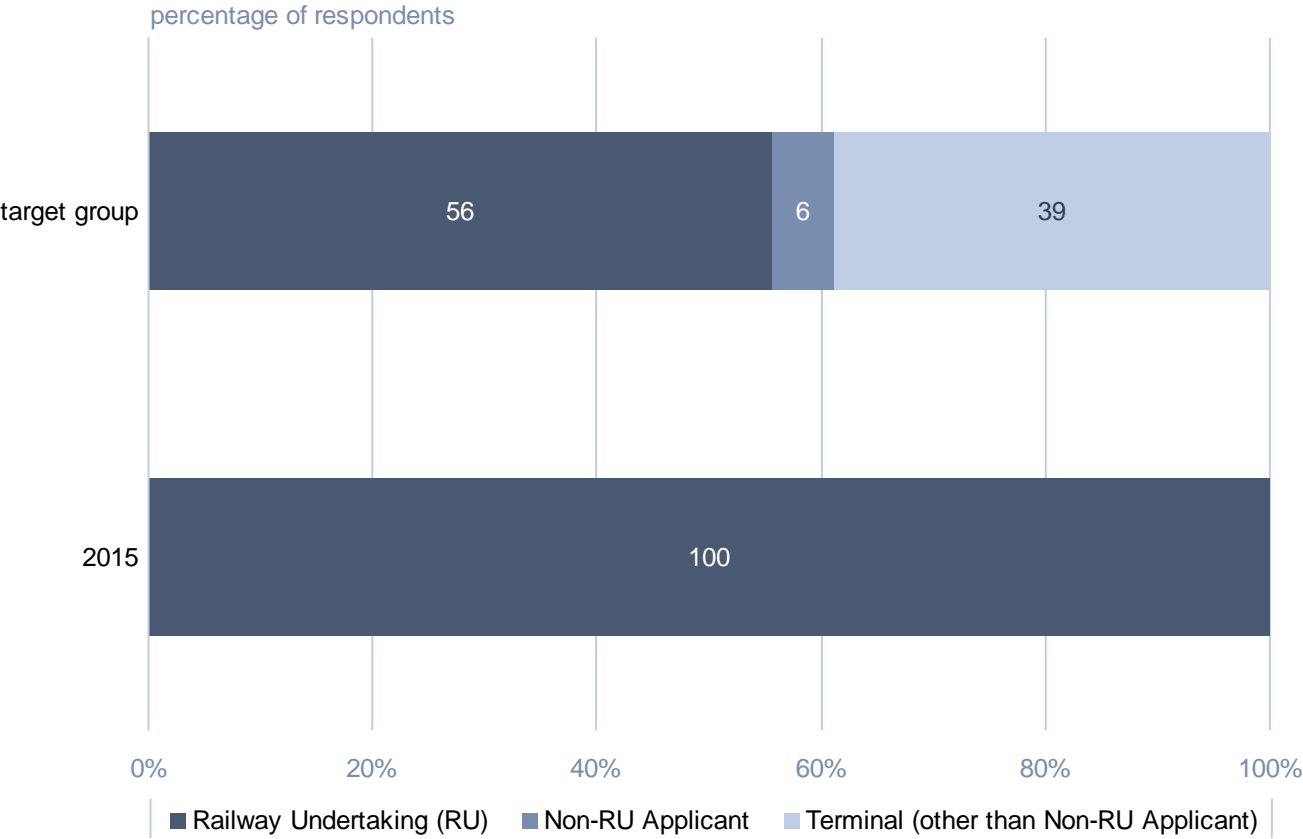
the cost challenge is not explicitly addressed in the regulation but it should be the basic idea of the RFC concept

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?"

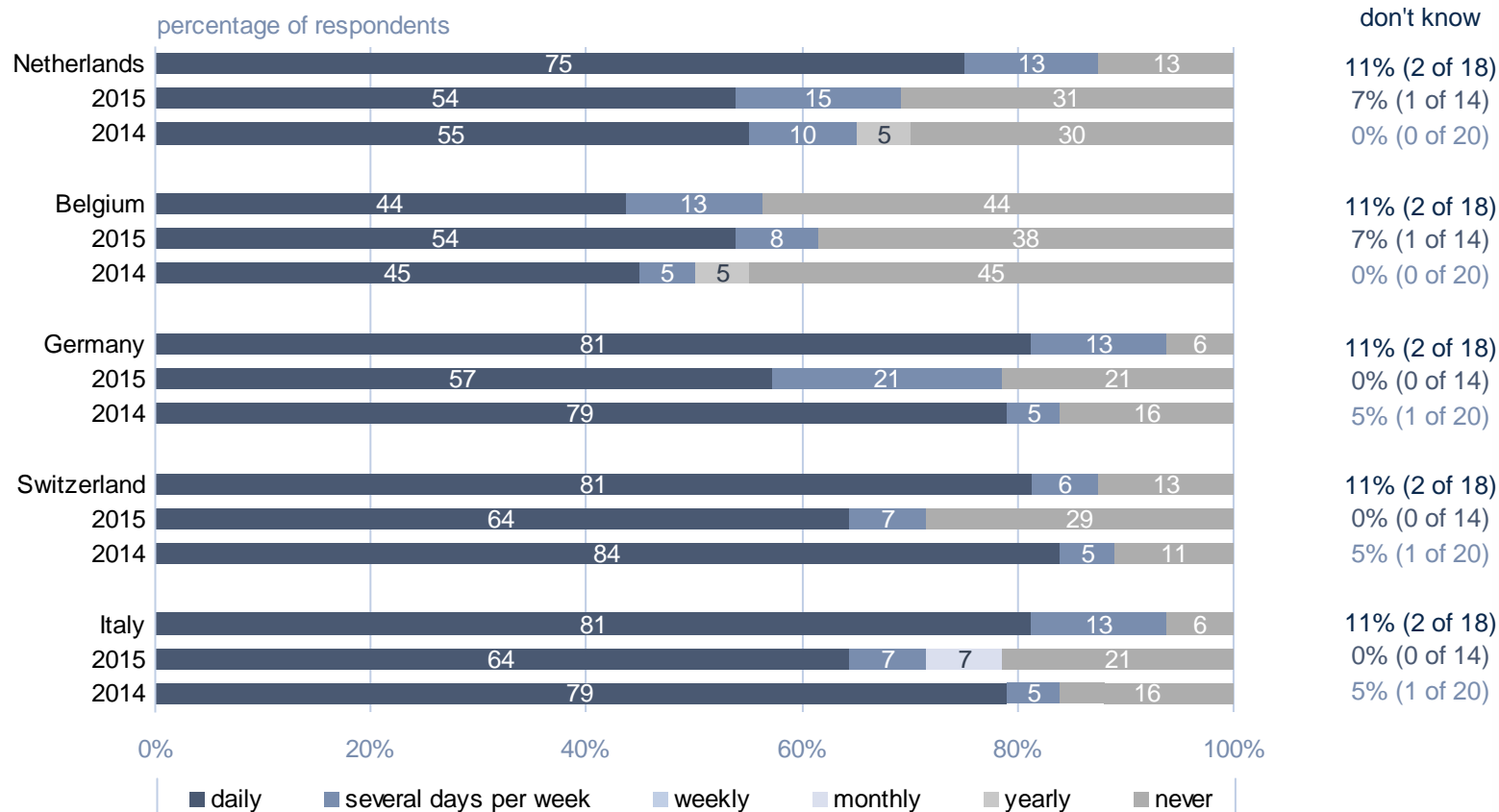


3 Sample Description



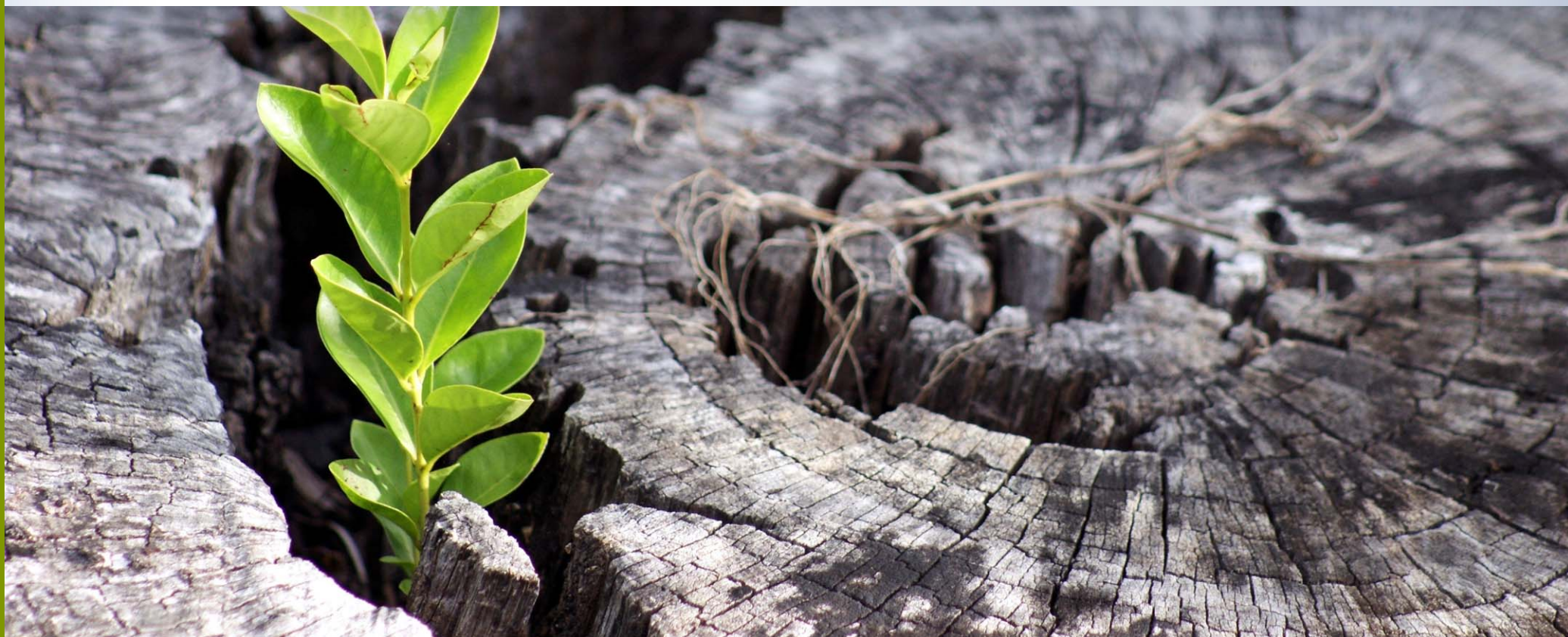
"To which of the following types of target groups does your company belong?"

n = 18; 14

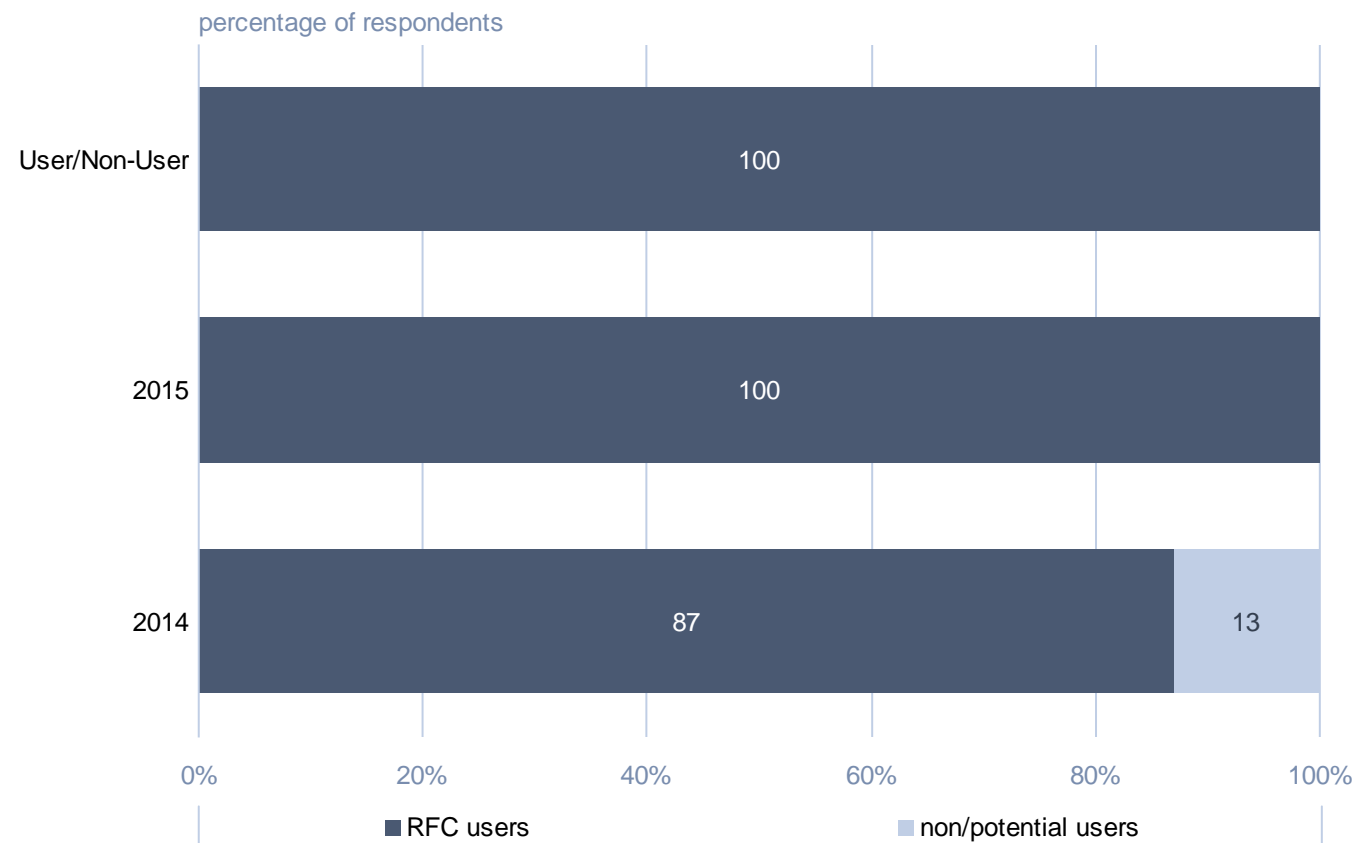


"How frequently does your company operate/run international services on the following sections of this corridor?"

n = 18; 14; 20



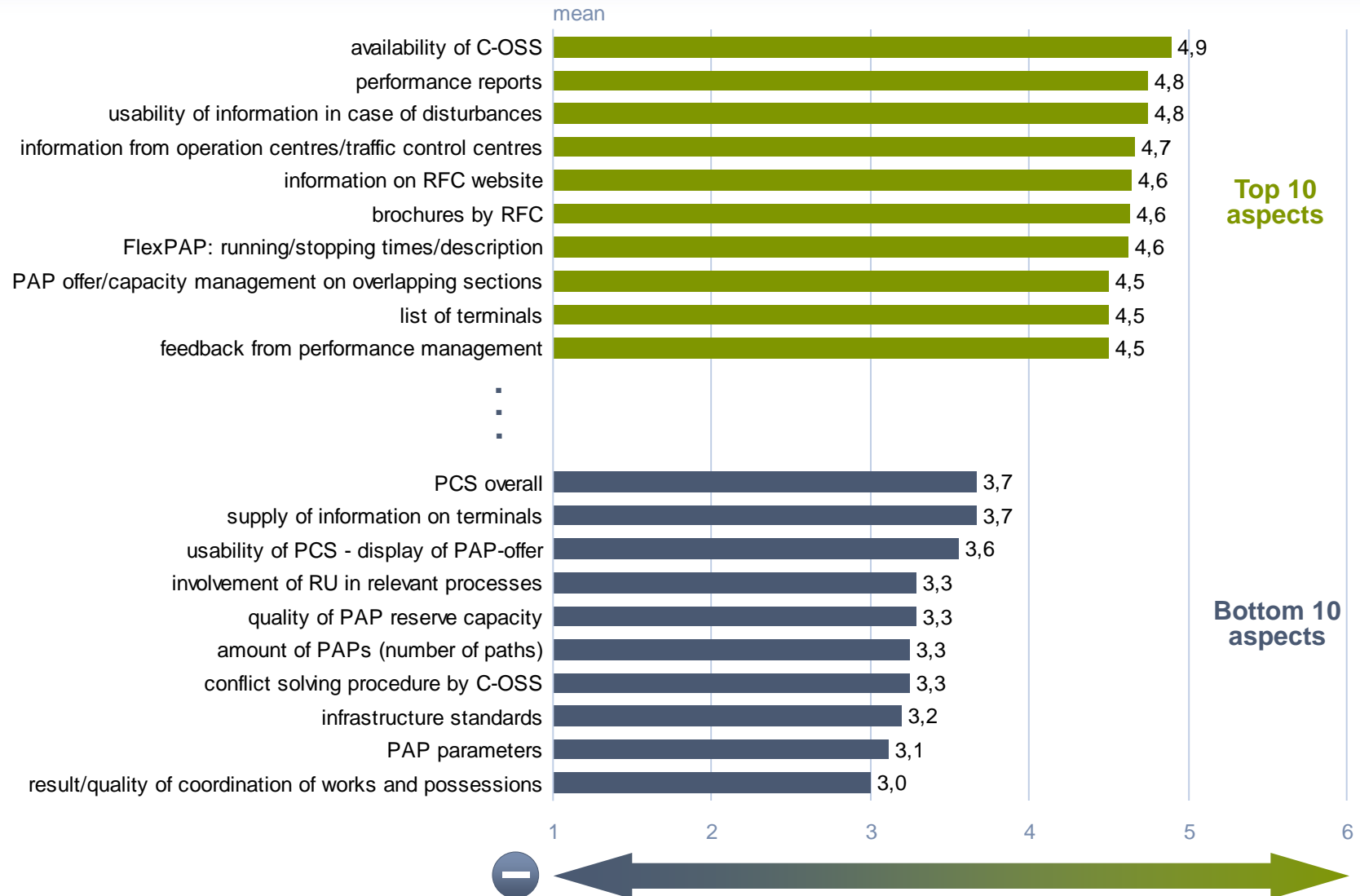
4 Non/potential users

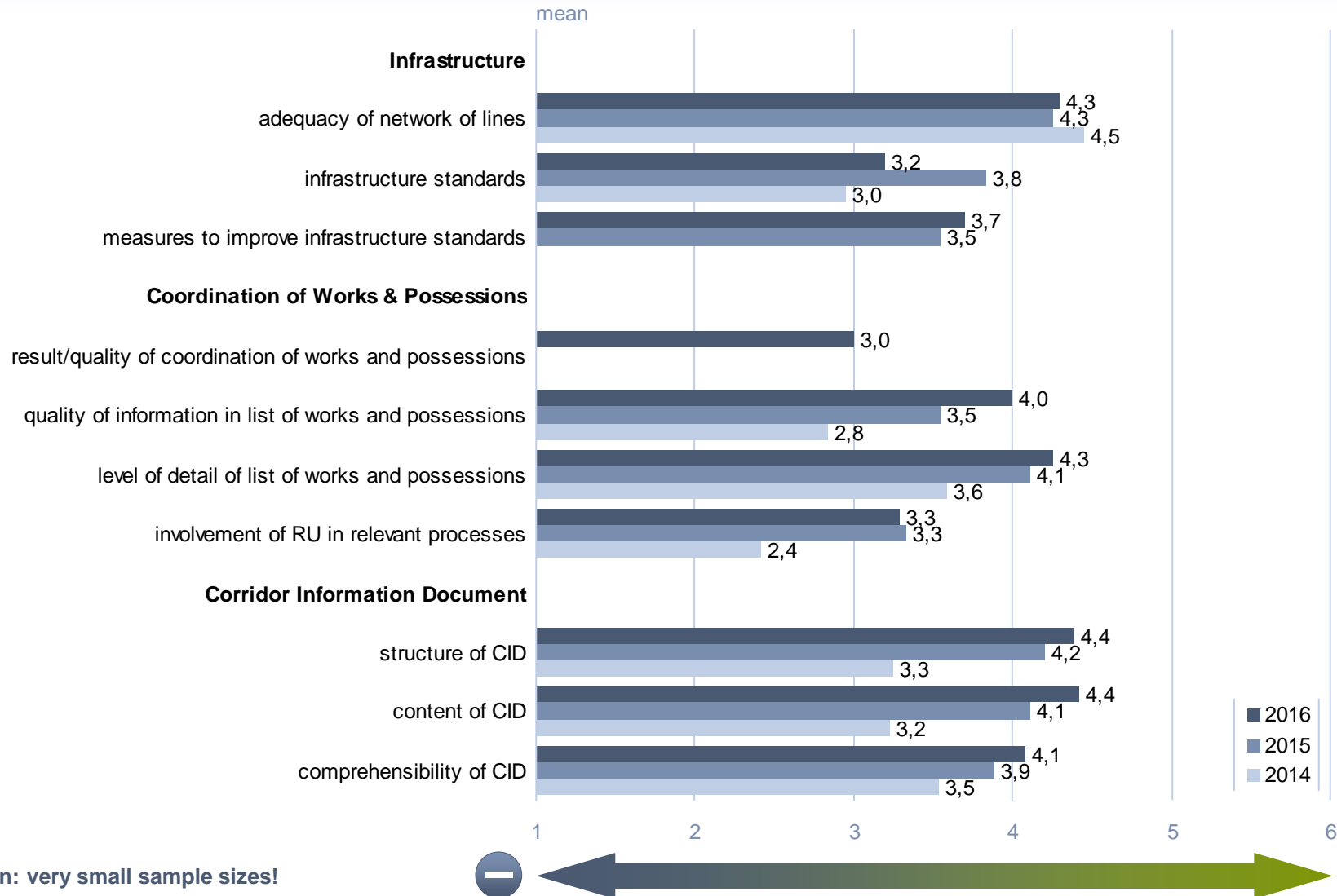


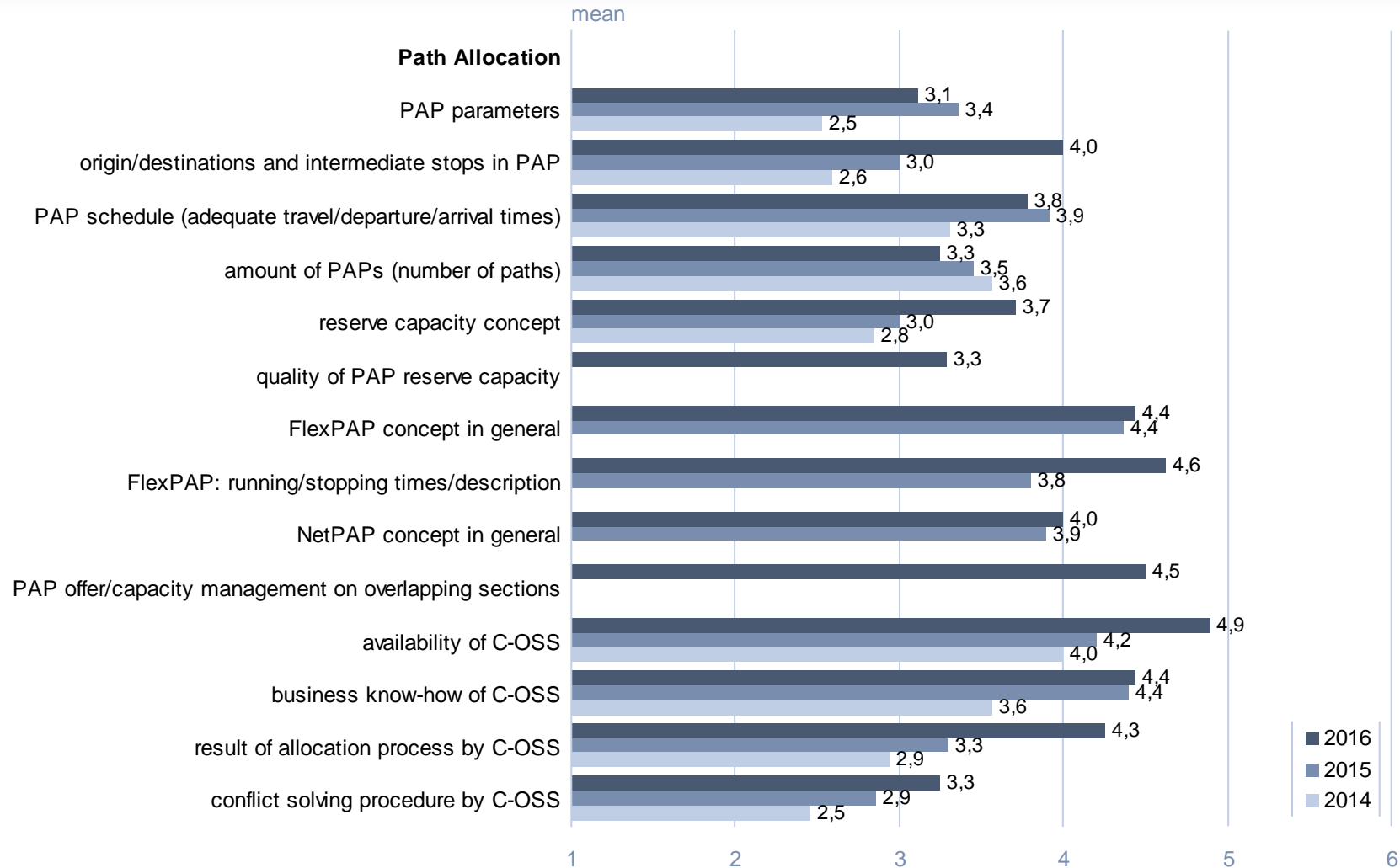


5 Summary



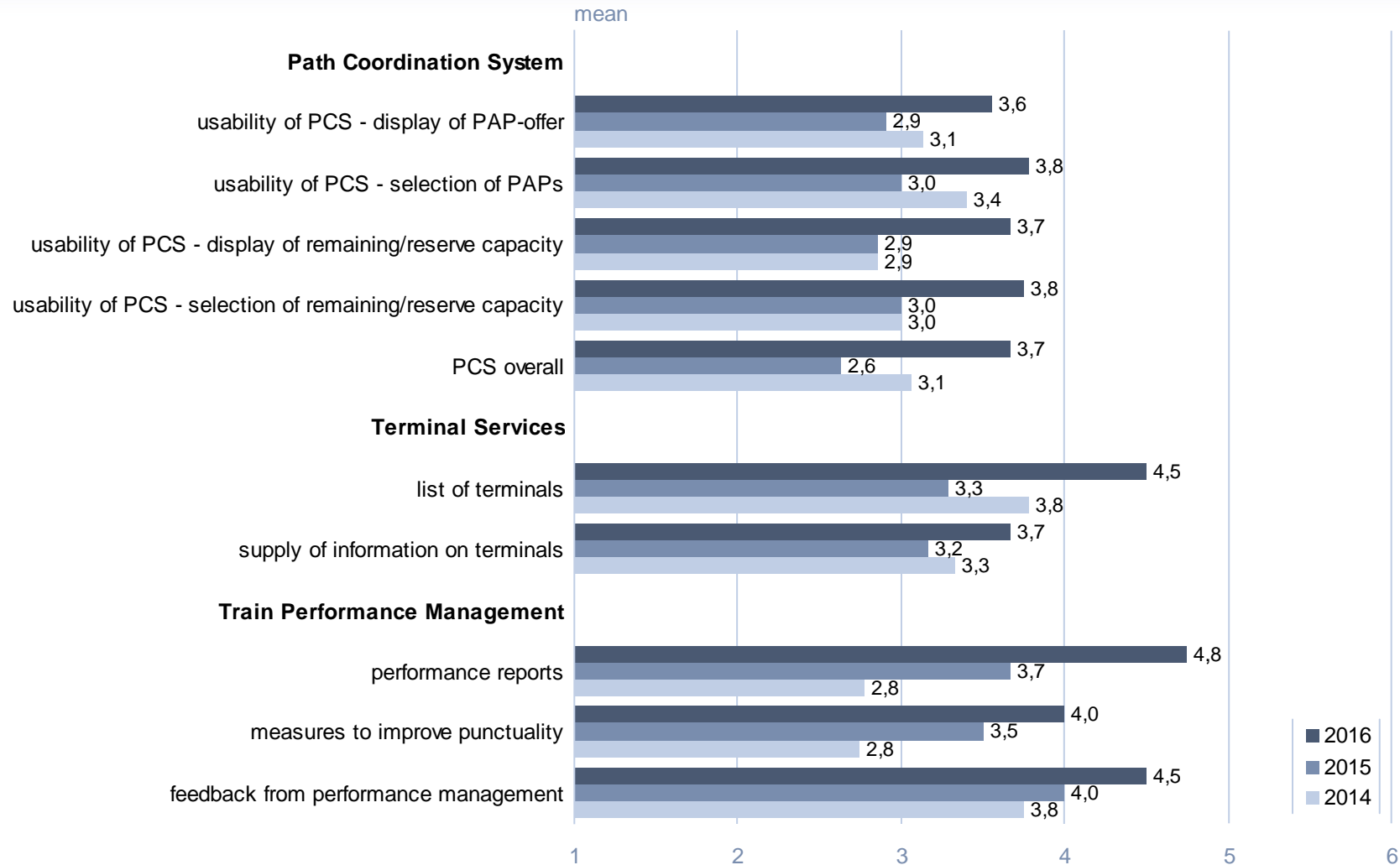






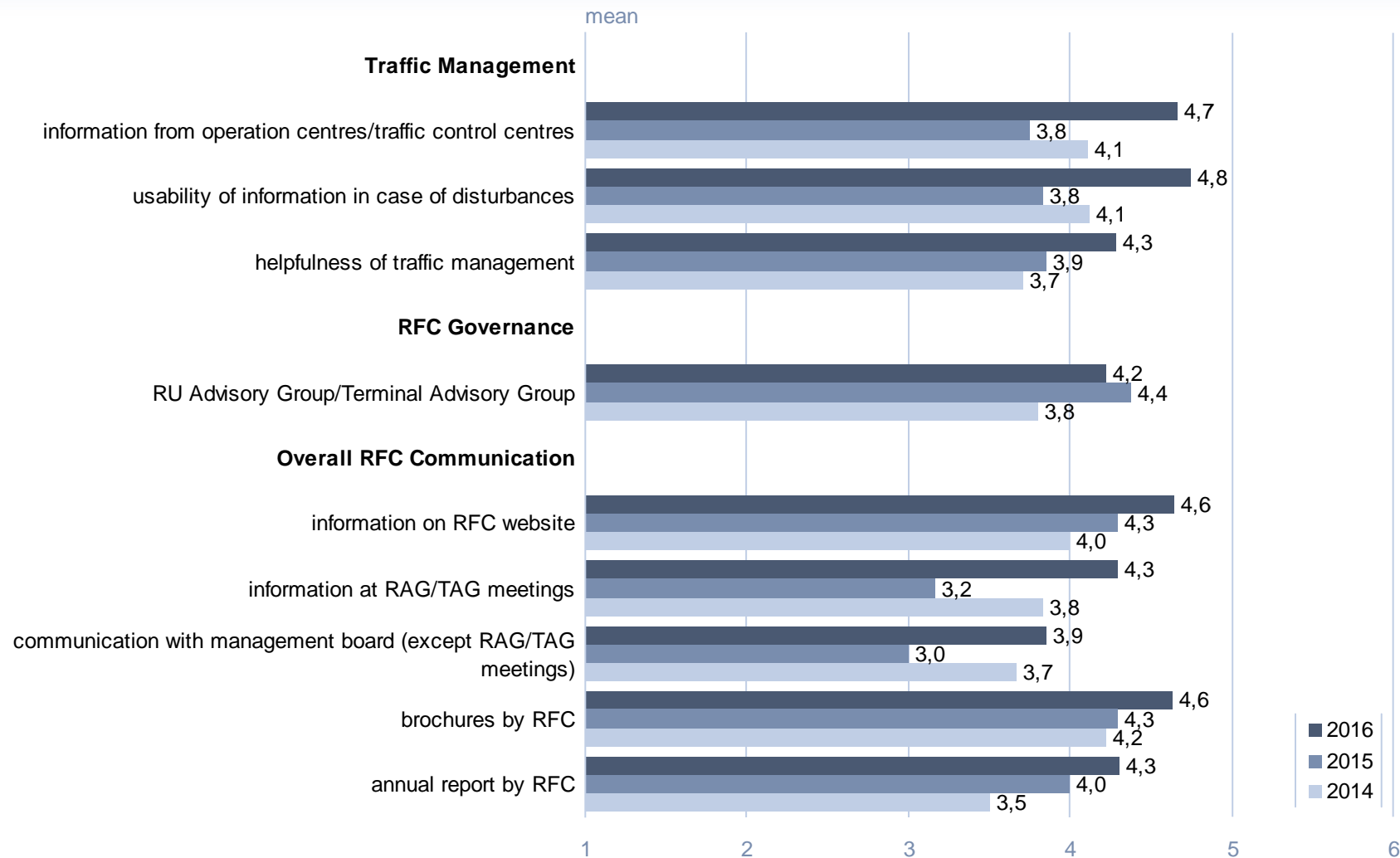
Attention: very small sample sizes!





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