



Rail Freight Corridor  
North Sea – Baltic

# Annual Report 2025

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## FOREWORD

*Dear Reader,*

*The year 2025 has been a period of continued transition for the European rail sector and for RFC North Sea – Baltic. Building on the changes introduced to the RFC Regulation by the TEN-T Regulation we have focused on the practical implementation of the new framework while continuing to fulfil the specific role of RFC NS-B as a Rail Freight Corridor operating alongside the European Transport Corridor. This implementation process is not only reshaping the formal architecture of the Corridor, but also strengthening coordination across borders, enhancing interoperability, and reinforcing our contribution to a more efficient and resilient European transport network. While the transformation is complex, it provides a clear direction for the future development of rail freight in Europe.*

*The year has also brought notable changes to the governance structure of the Corridor. Following the realignment introduced by the TEN-T framework, the Czech Republic is no longer part of RFC North Sea – Baltic as of the end of 2025. We take this opportunity to express our sincere appreciation for its longstanding commitment and valuable contribution to the work of the Corridor over the years. At the same time, we are pleased to welcome Sweden and Finland to the Executive Board. Their participation marks an important step towards broader regional engagement and strengthens the strategic dimension of the Corridor.*

*Alongside these structural developments, RFC NS-B has continued to deliver on its core mission without interruption. We have maintained our operational focus on facilitating seamless cross-border freight transport, improving coordination among Infrastructure Managers, and engaging closely with our stakeholders. Our established governance model and collaborative approach remain key assets in navigating this evolving landscape. In parallel, the first big step towards the new RFC was taken with the publication of the Implementation Plan in July 2025 outlining the strategic measures and actions required to enhance the performance, capacity and quality of this vital East – West Corridor.*

*Looking ahead, we are closely following the anticipated developments related to the forthcoming Regulation on capacity management. This initiative is expected to play a pivotal role in shifting rail capacity management from a fragmented, nationally-driven and timetable-based system to a more integrated, coordinated European framework with a multi-annual, digital approach. It will strengthen cross-border planning and cooperation, improve the efficiency and flexibility of rail operations by ensuring better usage of existing infrastructure while supporting strategic priorities, such as military mobility and network resilience. We stand ready to adapt to these changes and to contribute actively to their implementation once the framework is adopted.*

*For now, we would like to express our sincere appreciation to all partners and stakeholders for their continued engagement and support throughout 2025. Their contribution remains indispensable to ensuring the stability and future success of the Corridor.*



**Oliver Sellnick**

*Chairman of the Management Board*



**Katarzyna Wachowicz**

*Managing Director*

## INTRODUCTION

This document presents the Annual Report 2025 of Rail Freight Corridor North Sea – Baltic (RFC NS-B). The report provides Corridor stakeholders with general information on activities of the Corridor in the past year. This is the last Annual Report according to the old alignment of the Corridor <sup>1</sup>.

### 1. GOVERNANCE

The governance structure of RFC NS-B is divided into three levels: the Executive Board (ExBo), the Management Board (MB) and the Advisory Groups (AG), working together towards the development and improvement of the Corridor.

The **Executive Board** is composed of representatives of Ministries (MoTs) in charge of rail transport of the cooperating countries and is responsible for defining the general goals of the Corridor.

The **Management Board** is the decision-making body of the Corridor and consists of representatives of the cooperating Infrastructure Managers (IMs) and Allocation Body (AB) of the countries involved. Since 2016 the MB has the legal form of a European Economic Interest Grouping (EEIG).

The **Advisory Groups**, consisting of, on the one hand, Railway undertakings (RUs) and interested applicants and, on the other hand, Terminal owners/operators, issue opinions on any proposal by the Management Board, which has direct consequences for them or issue own-initiative opinions, which shall be considered by the Management Board.

The governance structure of the Corridor is illustrated in the below organigram.



<sup>1</sup> In 2025 the Corridor ran through eight EU Member States: starting in the North Sea ports of Antwerp, North Sea Port (Gent/Terneuzen), Zeebrugge, Rotterdam, Amsterdam, Wilhelmshaven, Bremerhaven and Hamburg spreading in central Germany through Aachen, Hannover, Magdeburg and Berlin to Warsaw and the Polish-Belarus border in Terespol. A branch leads from Magdeburg to Prague via Falkenberg and Dresden. In Falkenberg starts the Southern branch in Poland to Wrocław, Katowice and Medyka. Another branch goes from Warsaw to Kaunas, then to Riga and Tallinn.

## 1.1 EXECUTIVE BOARD

The Executive Board (ExBo) of RFC NS-B, as referred to in Article 8 of Regulation (EU) No 913/2010 of the European Parliament and of the Council of 22 September 2010 concerning a European rail network for competitive freight (hereinafter – RFC Regulation), was originally established on the 20th of March 2012 by the Mission Statement, which was replaced by the Joint Declaration of Intent regarding the establishment of the Executive Board of RFC North Sea-Baltic dated on the 22nd of November 2019, extending RFC NS-B to the Republic of Latvia and the Republic of Estonia.

The Executive Board is composed of the representatives of the authorities of the Kingdom of Belgium, the Czech Republic, the Republic of Estonia, the Federal Republic of Germany, the Republic of Latvia, the Republic of Lithuania, the Kingdom of the Netherlands and the Republic of Poland. In 2025 representatives of Finland and Sweden joined the Executive Board as observers, as Regulation (EU) 1679/2024 of the European Parliament and of the Council on Union guidelines for the development of the trans-European transport network, amending Regulation (EU) 2021/1153 and Regulation (EU) No 913/2010 and repealing Regulation (EU) 1315/2013 (hereinafter – TEN-T Regulation) foresees the extension of the RFC NS-B to these countries (see also 1.1.1).

The Executive Board takes legally binding and directly applicable decisions within the scope of its powers defined by the RFC Regulation with mutual consent. They are signed by all members of the Executive Board and are published.

The Board meets four times a year and has a rotating presidency. In 2025 it was chaired by the representative of the Czech Ministry of Transport.

There were several changes in 2025 regarding the representation of the Member States in the ExBo. After many years, the Dutch member Marcel Tijs left his position and was replaced by Ms Angelique Blom-Meyer. There was also a change in the Polish representation: Jakub Kapturzak was replaced by Mr Dariusz Knopp from January 2025. In addition, the ExBo welcomed the new representatives from Finland, Ms Maria Torttila (substituted by Ms Kaisa Kuukasjärvi) and Sweden, Mr Einar Schuch.

## FULL REPRESENTATIVES OF THE EXECUTIVE BOARD

<p>Pierre Bodiaux</p>  	<p>Jindřich Kušnír</p>  	<p>Indrek Laineveer</p>  	<p>Jörg Stephan</p>  	<p>Patriks Markēvičs</p>  
<p>Roderikas Žiobakas</p>  	<p>Ebru van Schie – Akdağ</p>  	<p>Dariusz Knopp</p>  	<p>Einar Schuch</p>  	<p>Maria Torttila</p>  

## STAND-IN REPRESENTATIVES OF THE EXECUTIVE BOARD

<p>Caroline Avaux</p>  	<p>Lukáš Soukup</p>  	<p>Anne Kemmler</p>  
<p>Vidmantas Tamulis</p>  	<p>Angelique Blom-Meyer</p>  	<p>Kaisa Kuukasjärvi</p>  

### 1.1.1 Key activities of the Executive Board

The ExBo's meetings in 2025 were held in:

- March 2025 – Berlin (Germany)
- July 2025 – Warsaw (Poland)
- October 2025 – Vienna (Austria)
- December 2025 – Prague (Czech Republic).

The general responsibility of the Executive Board is to implement the RFC Regulation.

One of the most important topics discussed by the ExBo in 2025 was the process of implementing the amended RFC Regulation. In order to fully implement this Regulation, the two most important ExBo documents - Joint Declaration establishing the Executive Board of RFC North Sea – Baltic and the ExBo Internal Rules and Procedures were revised. Both documents were discussed and the Joint Declaration submitted for signature to the Member States. From January 2026, the ExBo composition will officially change: the ministries from Finland and Sweden become full members of the ExBo and the Czech ministry will leave RFC NS-B. Ukraine is not included in the new governance structure, due to the ongoing war and the fact that the RFC Regulation does not apply to them as a non-EU member.

Another important topic was the Proposal for a Regulation of the European Parliament and of the Council on the use of railway infrastructure capacity in the single European railway area, amending Directive 2012/34/EU and repealing Regulation (EU) No 913/2010 (hereinafter Capacity Management Regulation). This piece of legislation is crucial for the future operations of RFC NS-B, because it establishes a new governance structure and repeals Regulation (EU) No 913/2010 from 14th of December 2030. In November 2025 Council and Parliament negotiators reached a provisional agreement on the text of the Regulation. It will be published and enter into force in 2026. The ExBo had extensive discussions on the implementation of this Regulation and the necessary steps; discussions will continue also in 2026.

As in the previous year, the project of Digital Automatic Coupling (DAC) was also discussed in the ExBo meetings. ExBo members discussed progress of DAC in Germany and the Czech Republic as well as evaluated possible costs and benefits of DAC implementation.

Among others, the issue of Military Mobility was discussed, as well as the geopolitical situation and sanctions to Russia and Belarus influenced the corridor operations and freight flows. It was agreed to pay special attention to Military Mobility in 2026 and organize a special event next to an ExBo/MB meeting in 2026.

### 1.1.2 Cooperation at EU level

In 2025, the Network of Executive Boards of the RFCs (NExBo) was co-chaired by Austria and Luxembourg. Two NExBo meetings took place, 14<sup>th</sup> of May in Luxemburg and 23<sup>rd</sup> of October in Vienna, which was organized parallel to the October RFC NS-B meeting, which was also held

there. During both meetings Ministries exchanged information and best practices of the different RFCs, discussed ongoing EU legislative initiatives influencing RFC operations. Other topics, such as the follow-up of the work done at RNE level, the KPI Working Group and information on studies launched by the European Commission (EC) were also on the agenda of the NExBo meeting. During the first meeting the ETA (Estimated time of arrival) Project, ERA (European Union Agency for Railways) activities, Digital Automatic Coupling (DAC) and the upcoming Danish EU Presidency were discussed. During the second meeting it was proposed to create a working group in order to discuss and coordinate among Ministries the strategic guidance, which is envisioned in the Capacity Management Regulation. Belgium, Luxemburg, Austria and the Netherlands decided to participate in the working group about strategic guidance.

It was discussed to organise an ExBo and MB (Management Board) meeting with the European Coordinator for the ETC North Sea-Baltic, Ms Catherine Trautmann. However, due to her busy schedule it was not possible to conduct such a meeting in 2025.

### 1.1.3 RFC Governance obligation from TEN-T Regulation

According to Article 19 of the TEN-T Regulation, the Rail Freight Governance of RFC NS-B shall make all possible efforts to ensure by 31 December 2030, that the quality of services provided to railway undertakings and technical and operational requirements for infrastructure use support the operational performance of rail freight services along the European Transport Corridor meeting the following target values:

- *For each internal cross-border section, the dwelling time of all freight trains crossing the border between two Member States does not exceed 25 minutes on average. 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.*
- *At least 75% of the freight trains crossing at least one border along a 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 occurring in and attributable to third countries that are crossed by freight trains shall not be taken into account.*

These operational TEN-T KPIs will be reported on starting with the year 2026 (see Chapter 5 Outlook 2026).

## 1.2 MANAGEMENT BOARD

In 2025, the Management Board (MB) chaired by Mr. Oliver Sellnick (DB InfraGO AG) held four online meetings and four physical meetings. The activities of the Management Board, carried out in 2025, are further described in chapters 2 to 4. Since 2016, the MB has the legal form of a European Economic Interest Grouping (EEIG). It is composed of the following Members representing the Infrastructure Managers (IM) and Allocation Body of the countries of the

Corridor. The Statutes of the EEIG were adapted in 2025 to take into account the new alignment of the RFC NS-B, without SŽCZ from January 2026. As the Finnish railway system is not linked to Estonia, Finland decided to make use of the exemption in the RFC Regulation, to not participate in the Management Board of the Corridor, and hence also not be part of the EEIG. Due to this decision, it did not make sense for Sweden to be part of the Management Board.

## MANAGEMENT BOARD

Guus  
de Mol



**ProRail**

Michel  
Geubelle



**INFRABEL**

Oliver  
Sellnick



**DB InfraGO**

Radek  
Čech



**SPRÁVA  
ŽELEZNIC**

Weronika  
Karbowski



**PKP POLSKIE LINIE KOLEJOWE S.A.**  
The manager of the national railway network

Andrius  
Bartuškevičius



**LITG INFRA**

Justina  
Hudenko



**LATRILNET**

Silvija  
Dreimane



**LATVIJAS DZELZCEĻŠ**

Taavi  
Toom



**EESTI RAUDTEE**

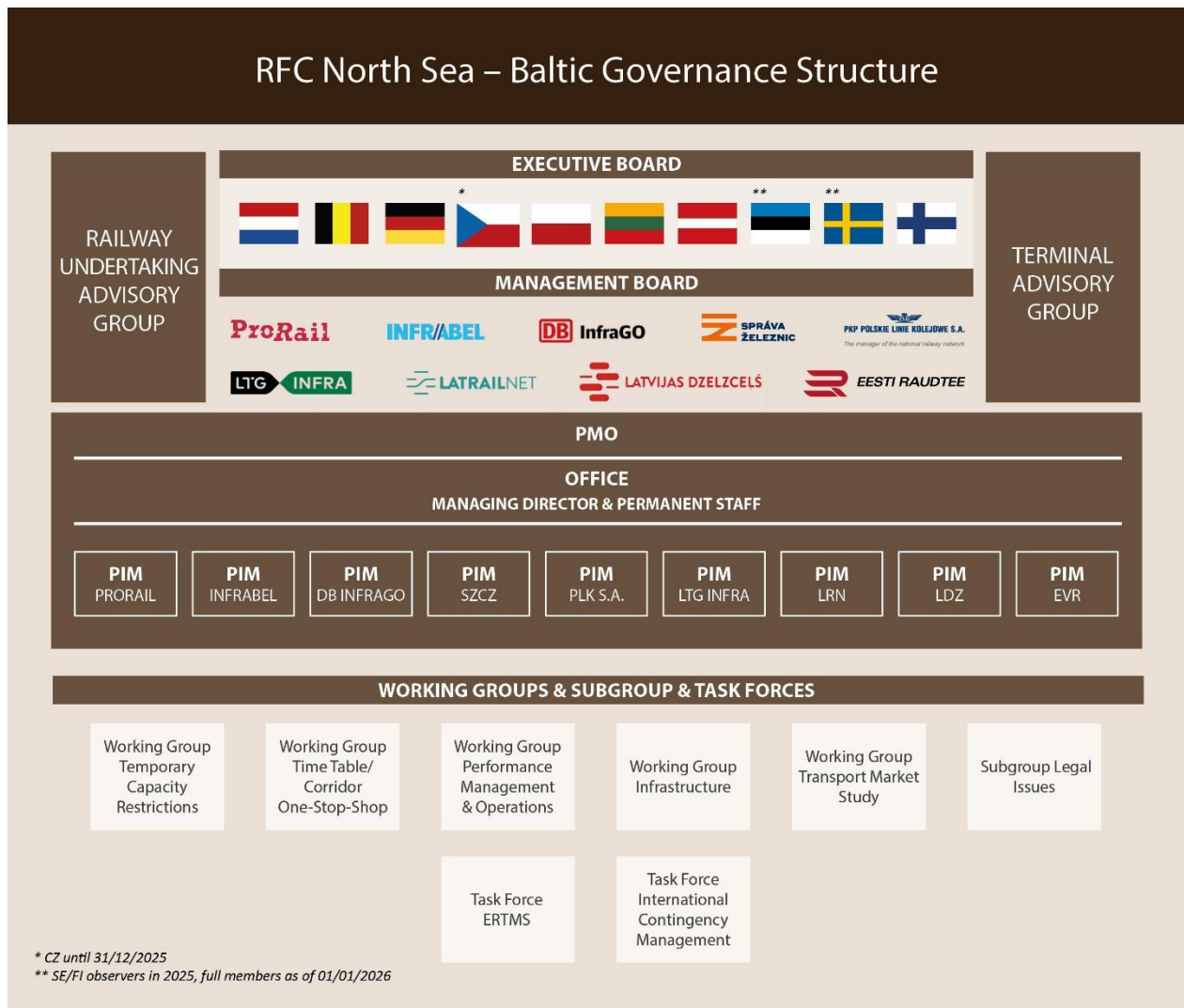
\* Management Board: situation until 31/12/2025

The Management Board is supported by the Project Implementation Managers (PIMs) and the RFC Office with its permanent staff and Managing Director, Katarzyna Wachowicz.



In 2025, three online and four physical meetings of the Project Management Office (PMO) took place.

The below organigram illustrates the structure of the Project Management Office and the different working groups in 2025:



### 1.3 ADVISORY GROUPS

Each Advisory Group (AG) serves as a platform to facilitate the exchange of information, finding solutions and mutual understanding in a non-discriminatory way. As advisory body, each group issues opinions on decisions by the Management Board, which have direct consequences to its members or issues own-initiative recommendations, which shall be taken into account by the MB. The role of the AG was enhanced with the implementation of the amended RFC Regulation.



Each AG is chaired by a Speaker, who acts as the contact person between the MB and the AG members. In 2025, the Terminal Advisory Group (TAG) was chaired by Mr. Erik Nieuwenhuis from the BTT Rail Terminal Rzepin Spółka z o.o. and the RAG (Railway undertaking Advisory Group) by Mr. Paweł Wiechoczek from DB Cargo Polska.

Two Advisory Group meetings were held in 2025 with representatives of Railway undertakings, Terminals, Infrastructure Managers, Ministries, Regulatory Bodies (RBs) and invited guests on:

- 26<sup>th</sup> of March 2025 in Berlin
- 22<sup>nd</sup> of October 2025 in Vienna.

The physical meeting in Berlin was attended by more than 50 participants and the second in Vienna by more than 90, which was a joint meeting with the RFC Baltic-Adriatic (RFC BA) and Rhine-Danube (RD).

During the first RAG/TAG meeting the German Rail Freight Masterplan was presented by Stephan Jörg from the Federal Ministry for Digital and Transport. The participants also discussed the state of play on the borders: Bad Bentheim – Oldenzaal, Frankfurt(Oder) – Rzepin, Bad Schandau - Děčín. The Corridor One-Stop-Shop (C-OSS) Manager informed participants about the offer published in January 2025 for TT2026, pointing out that SŽCZ exit from the Corridor will not affect the simplicity of ordering PaPs for customers as the allocation will happen via RFC Rhine – Danube.

During the RAG slot, the topic of the track closures at Oderbrücke was presented and a call was made to improve the dialogue between IMs and RUs when it comes to TTR and TEN-T Regulation implementation. The participants also discussed the state of play of the Rail Baltica

project. Stefan Hagenlocher, Consultant for HWH, who prepared a study for the German MoT on DAC, presented the key findings of the study on the national possibilities for financial support.

During the second meeting the Temporary Capacity Restrictions including the High Performance Network works of DG InfraGO in 2026 were presented for all three RFCs. During the RAG slot challenges in interoperability, especially in operations and train operations were presented by the RAG Speakers. The RFC NS-B TAG Speaker, Erik Nieuwenhuis, presented the topic how to increase the number of terminals on the North Sea – Baltic corridor and optimize the existing ones. The participants were also informed regarding the RFC BA, NS-B and RD, PaP capacity offer TT 2027 by the C-OSS Managers.



*Joint RAG/TAG meeting 22nd of October 2025 in Vienna  
Photo: RFC NS-B Office*

Additionally in 2025, RFC NS-B also organized the joint TAG online meeting in cooperation with RFC Baltic-Adriatic on 16<sup>th</sup> of January 2025 which was attended by the TAG and RFCs Representatives. During the meeting, the participants were presented with the Rail Facilities Portal, Market analysis and the state of play of the Transport Market Studies. Additionally, the operational targets on punctuality were discussed.

## 2. MAIN ACTIVITIES

### 2.1 CORRIDOR ONE-STOP-SHOP AND CORRIDOR OFFER

The Corridor One-Stop-Shop (C-OSS) is the joint body designated by the IMs/AB involved in RFC NS-B and the single point of access providing the Corridor capacity products to all rail freight applicants. Anna Difliff is the C-OSS manager on behalf of RFC NS-B.



RFC NS-B is highly committed to offer capacity products that comply with the market demand and the expectations of applicants regardless whether they are RU or non-RU applicants. To achieve the aim to be a customer- and service-oriented Corridor with fitting capacity products, the applicants are asked for direct and indirect feedback that supports the C-OSS Manager to constantly shape the capacity portfolio.

To intensify the close cooperation with applicants and improve the capacity offer, the C-OSS Manager participated in :

- Forum Train Europe Conferences B (online) and D (online)
- RailNetEurope (RNE) working groups for the development of the Path Coordination System (PCS Capacity Broker) with applicants' involvement
- C-OSS Community working group
- International trade fairs and events such as the Fruit Logistica in Berlin or the transport & logistics in Munich

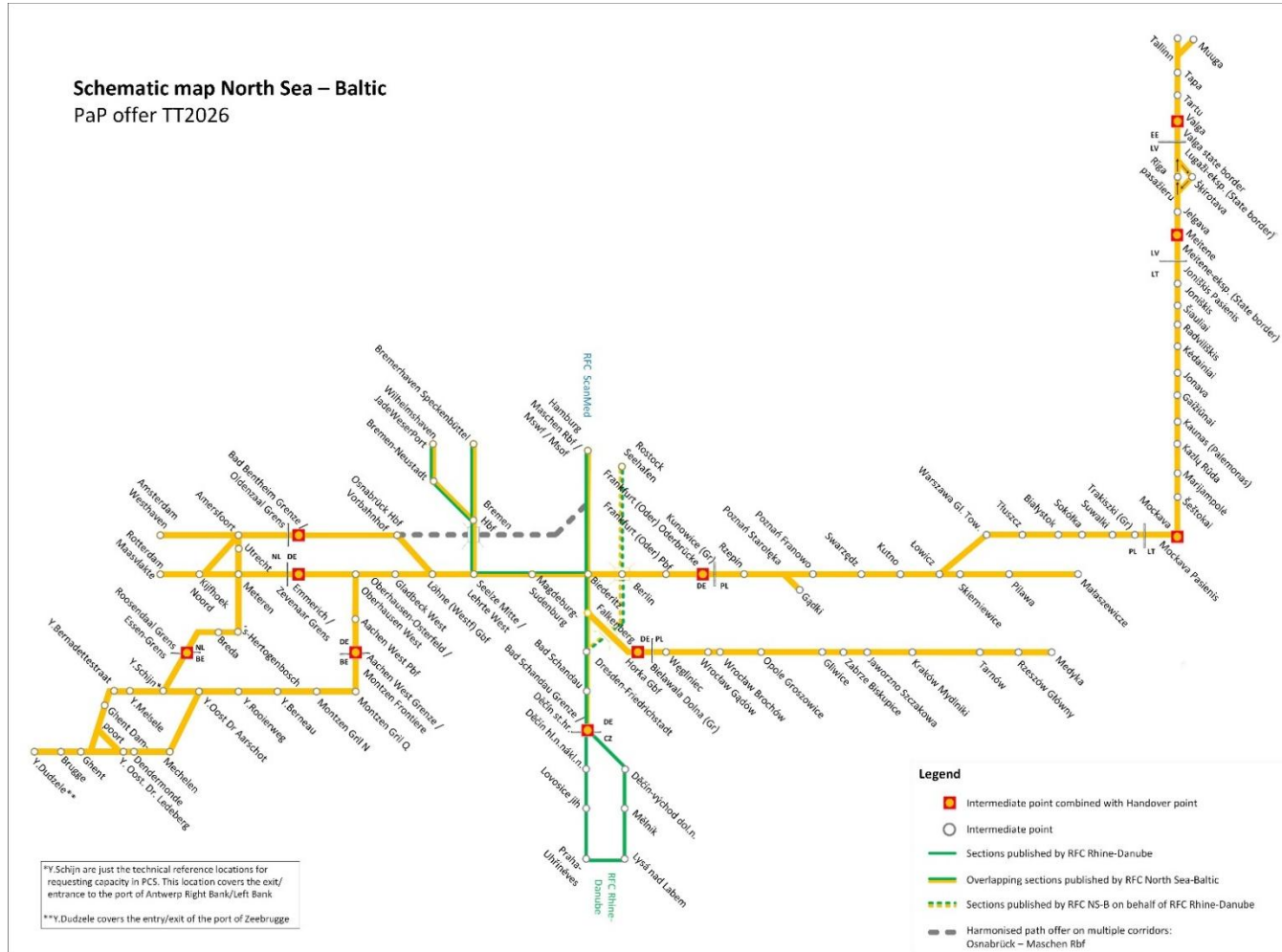
Besides that, the C-OSS took part in several RNE meetings to advise on international processes and working methods in cooperation with applicants and IMs/ABs.

Moreover, the C-OSS Manager was acting as the leader of the RFC NS-B working group TT/C-OSS which met 5 times throughout 2025. Based on the knowledge of national developments in rail freight transport and deep understanding of the market needs, this working group is deriving essential insights for capacity-related issues and further developments of the Corridor.

Throughout customer events and individual meetings organized by the C-OSS, applicants were trained in using the Path Coordination System (PCS), the ordering system to request international paths in one step and in a single operation.

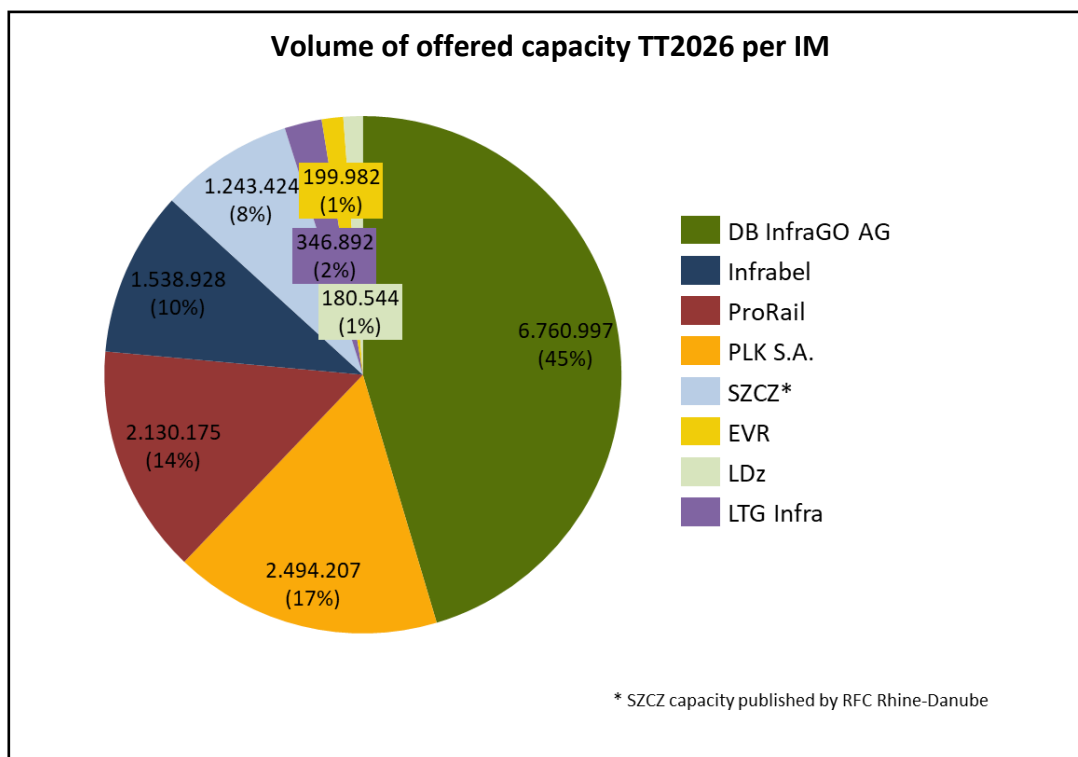
### 2.2.1 Pre-arranged Paths

The 2026 timetable catalogue of Pre-arranged Paths (PaPs) was published on 13<sup>th</sup> of January 2025 for the sections indicated in the schematic map below. While the SŽCZ capacity of RFC NS-B was published by RFC Rhine-Danube, the routing was improved on Latvian territory with a routing via Rīga Pasažieru in South-North direction and in Estonia, the PaPs ran to Muuga instead of Tallinn-Ülemiste.



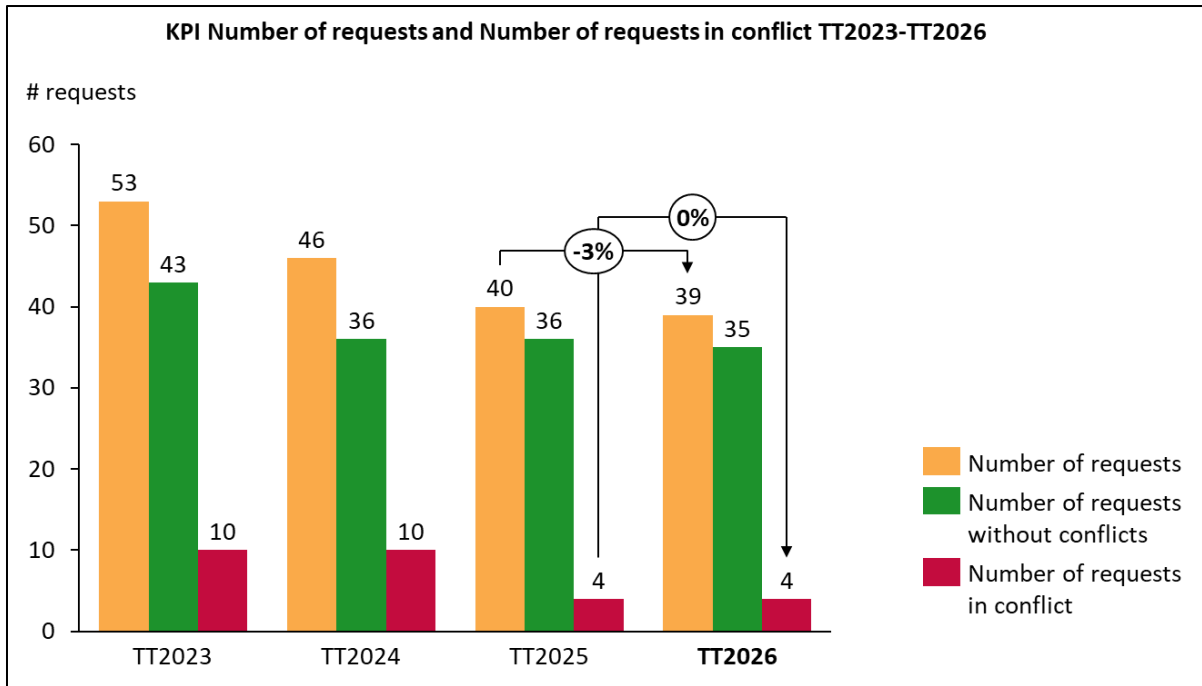
The PaP capacity offer TT2026 decreased by 2 % compared to the previous year due to a high number of TCRs on several sections: amongst others a closure between Löhne – Emmerich for two months; a reduction to one traffic day followed by a closure on the section Maschen - Biederitz for three months as well as the total closures throughout 2026 between Rzepin - Poznań and Skierniewice - Łuków.

14,9 million path km (days x km) were constructed as PaPs and offered to the European applicants to request for their individual international traffics until 14<sup>th</sup> of April 2025 for TT2026. Although SŽCZ was still a full member of RFC North Sea-Baltic in 2025, the SŽCZ capacity TT2026 was published by RFC Rhine-Danube to avoid any legacies at the moment of transitioning into the new RFC as of 1st of January 2026. RFC North Sea-Baltic was involved in the capacity offer.

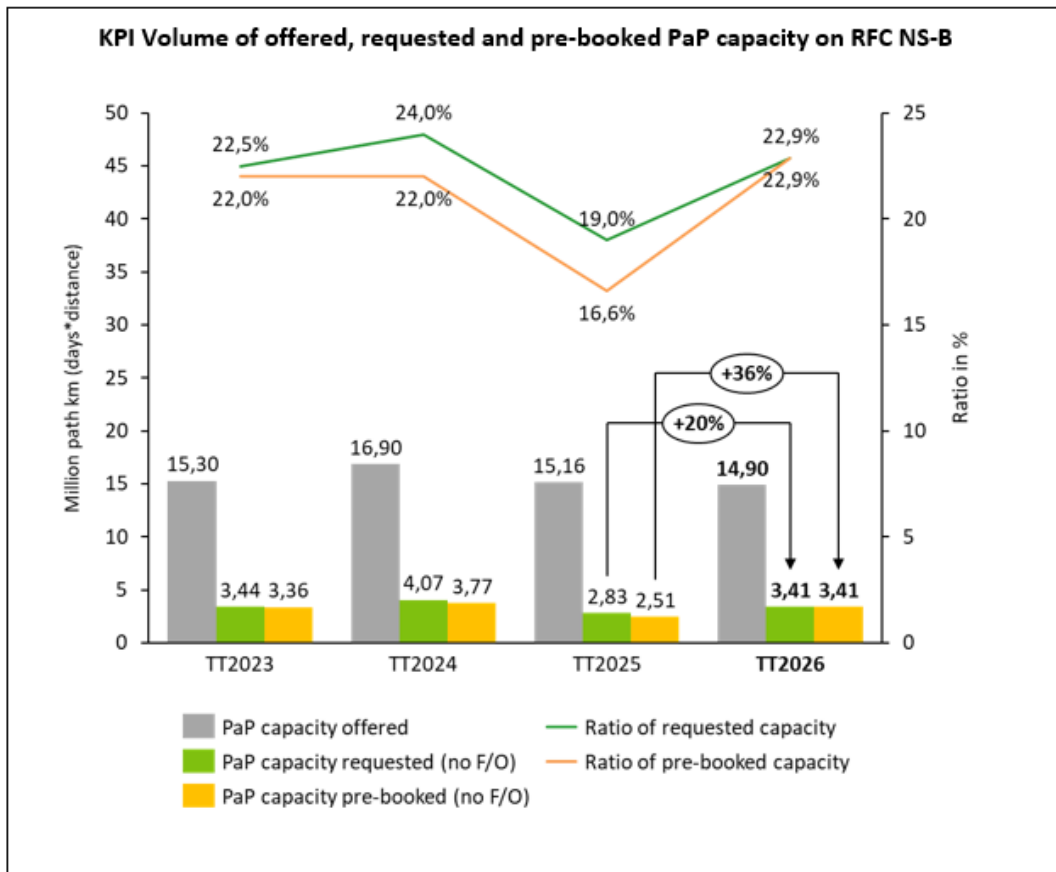


### Allocation of PaPs for TT2026

Eight leading applicants were involved in requesting paths for international freight traffic along the Corridor. All requests were placed on time in PCS. The graph below presents the comparison of the number of requests, where the RFC NS-B C-OSS was in the lead and the number of conflicts, which could all be solved. The number of requests decreased slightly by 3% for TT2026 and the number of conflicts stayed stable compared to TT2025 but involved more RFCs. Applicants tried to secure capacity through PaPs amidst a high number of TCRs.



The graph below presents the comparison of the volume of PaP capacity offered, requested and pre-booked, where the C-OSS Manager of RFC NS-B was in the lead (bar chart on left axis). The rate of requested capacity and the KPI Ratio of pre-booked capacity are also shown on the graph (line chart on right axis).



Both the PaP capacity requested (+20%) and pre-booked (+36%) increased in comparison to TT2025 and are almost back to the levels of TT2024. Without path sections on SŽCZ network, the volume of PaP capacity pre-booked would be at 2,5 million path km. Compared to the PaP capacity offered, the volumes of PaP capacity requested and pre-booked have both increased to a ratio of 22,9%.

Applicants were most interested in paths including TCRs. Besides a stable demand for harmonized PaPs (HaPs) with RFC ScanMed, the section between Roosendaal and the port of Antwerp was highly asked for.

3,41 million path km were pre-booked as PaP by the C-OSS of RFC NS-B, this corresponds to 65% of the total capacity requested on RFC NS-B lines. One dossier with 1.042 path km was pre-booked as tailor-made (below 0%).

1,85 million path km were pre-booked as Feeder/Outflow on RFC NS-B, this corresponds to 35% of the total capacity requested on RFC NS-B lines (1,85 million path km of 5,26 million path km). This relatively high share reflects the re-routings necessary due to TCRs.

The Draft TT Offer was published with heavy delays for 33 out of 39 dossiers due to a missing offer by DB InfraGO, ongoing TCR alignments at the border Bad Schandau – Děčín and an interrupted ŽSR (Železnice Slovenskej Republiky) interface with PCS. The delay was caught up for the publication of the Final Offer with 36 dossiers published on time. The quality of the offer was however disappointing as the timetable had to be further improved after Active Timetable for 15 dossiers. Ultimately, 36 dossiers (92%) reached Active Timetable on time; no offer was rejected by the applicants.

### **2.2.2 Reserve Capacity**

Reserve Capacity (RC) on RFC NS-B is the capacity product for the running timetable to provide applicants with an internationally harmonized path offer for new traffic needs during the year. RC is offered as a guaranteed contingent of “capacity slots” for international freight paths per day, direction and section on RFC NS-B lines. For TT2025, RFC NS-B offered 4.04 million path kilometres and one slot per day and direction. The capacity contingent of RC is allocated on the “first come, first served” principle.

The TT2025 catalogue for the RC slots was published on 14th of October 2024. RC was not requested for TT2025.

### **2.2.3 Cooperation with other Corridors**

With the new TEN-T regulation entering into force on 18th July 2024, RFC Orient/East-Med (RFC OEM) was dissolved and the additional lines from the German North Sea ports to the Czech Republic were merged into RFC Rhine-Danube in 2025. It was agreed to switch the SŽCZ capacity for PaPs to RFC Rhine-Danube and the respective path sections were published by RFC RD with RFC NS-B as “Involved RFC” in PCS for TT2026. Customers of both RFCs were able to see the offered paths but the SŽCZ capacity was not part of the RFC NS-B KPIs TT2026 to avoid any legacies after the exit of SŽCZ from RFC NS-B. Therefore, the involved C-OSS cooperated strongly from preparation to publication of the PaP offer TT2026 and aligned

during PaP allocation. Besides that, a harmonized PaP offer in cooperation with RFC ScanMed has been published, which was reflected in the publication of four Harmonized PaPs (HaPs) per direction on the section Maschen – Osnabrück connecting both RFCs. Lastly, PaPs for RFC NS-B on ProRail and Infrabel territory were published with involvement of RFC North Sea-Med and vice versa for a more global view on the flows at border points and better alternatives in case of conflict for customers.

## 2.2 CORRIDOR PERFORMANCE

According to Article 19(2) of the Regulation, the MB of RFC NS-B monitors the performance of rail freight services on the freight corridor and publishes the results of this monitoring once a year. In 2025, the Performance Report of RFC NS-B for the year 2024 was published on the [Corridor's website](#).

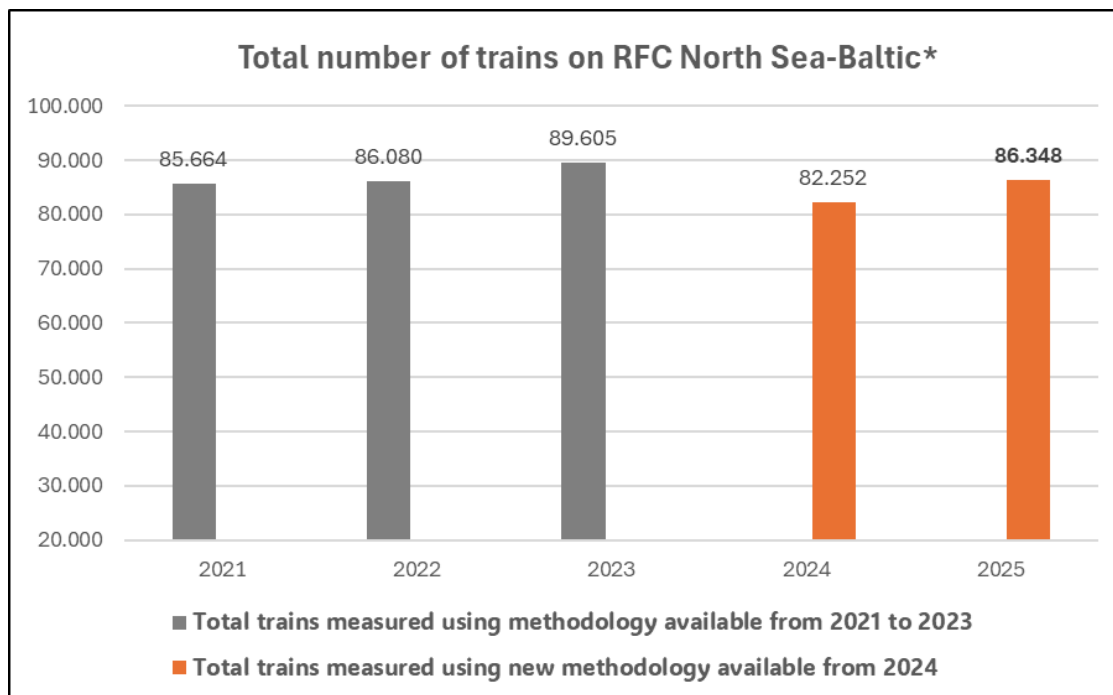
The full results for the year 2025 will be published in the first half of 2026, based on the commonly agreed KPIs, as described in the RNE KPI Guidelines. Two of these KPIs are already shown below. The capacity management KPIs can be found in subchapter 2.1.

### Number of trains on RFC North Sea-Baltic

This KPI displays the number of international freight trains that cross at least one international border and operate on designated RFC NS-B lines. The data for this KPI comes from the Train Information System (TIS), managed by RNE.

This KPI is displayed for a 5-year period. For 2025 the same RFC train definition was used as in 2024 which makes it possible to compare these figures, but not with the years prior to 2024.

**In 2025, the total number of trains on RFC North Sea-Baltic was 86.348.**

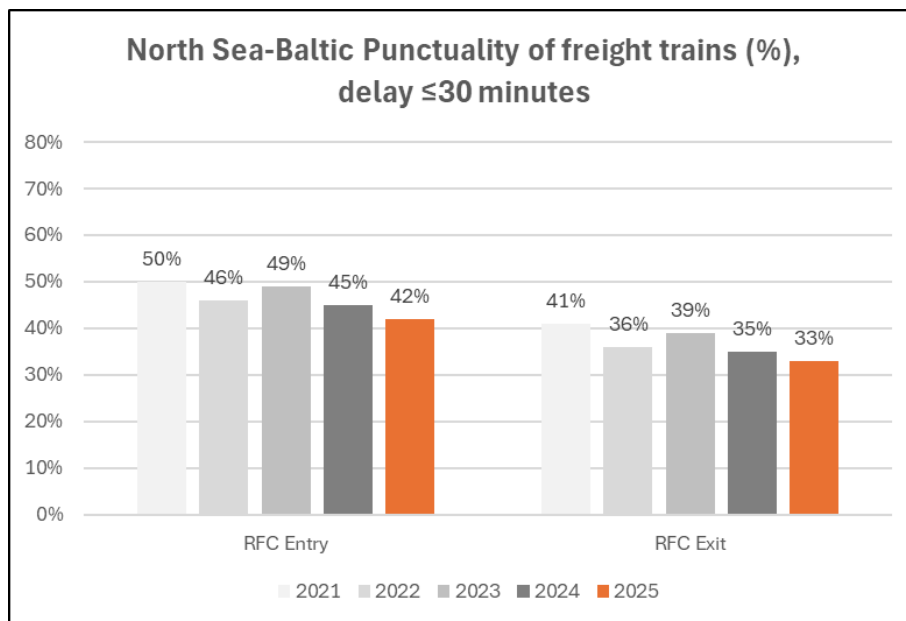


\* Data from Estonia and Latvia is not included here as they are not using TIS. Data for Lithuania is included from April 2024.

This presents an increase of approximately 5% compared to 2024, however the Working Group feels the TIS figures do not reflect the reality of the situation on RFC NS-B. On the one hand the figures should show a small increase in 2025, as a full year of data is available for Lithuania, compared to only 8 months in 2024. On the other hand, looking at the national figures at borders, a decrease is noticed at most of the borders except in the Baltic States, where, after several years, a small increase is measured. The main reason for the discrepancy of the TIS figures is the increase of unlinked trains in the 2025 data, leading to double counting of these trains. In 2026, the Working Group will focus on this issue with the aim to provide better data quality.

### Punctuality

This KPI shows the average punctuality of trains running on the Corridor at entry and exit of the Corridor (or origin/destination, if this is a point on the Corridor). A train is considered as punctual when it has a delay of  $\leq 30$  minutes. The calculation is based on data from TIS.



**Punctuality for 2025 at entry is 42% and at exit 33%. Average overall punctuality is 38%, compared to 40% in 2024.** There is a decline in punctuality on the Corridor for both RFC Entry and RFC Exit when compared to previous years, but in 2025 the delta between entry and exit punctuality is 9%, which is a small improvement compared to the 10% delta measured in 2024.

Major construction works, extended closures of main lines (resulting in re-routing), and several incidents and accidents are the most significant causes of delays, all of which have affected punctuality on the Corridor. More detailed information regarding the specific causes of delays on each IM's network can be found under "General comments on punctuality."

RFC NS-B also publishes [Monthly Punctuality Reports](#) on the Corridor’s website. These reports provide information on punctuality development over a 12-month period, including total delay minutes and the distribution of delays.

### **General comments on punctuality**

The information on punctuality in the countries along the Corridor is given per IM in geographical order beginning from the West of the Corridor.

#### **The Netherlands**

Most delays on the ProRail network were caused by both planned and unplanned works, which were largely due to unexpected technical issues. During 2025, as in 2024, there were again several extended periods of total closure of the German railway line between Emmerich and Oberhausen. During these periods, freight trains to and from Germany had to run via alternative routes that are used by both freight and heavy passenger traffic, resulting in lower punctuality than when the freight trains are running on the dedicated freight line, the “Betuweroute”.

#### **Belgium**

Most of the serious delays on the Infrabel network were caused by individual incidents, such as attempted cable theft leading to infrastructure breakdowns, delays from neighbouring IMs, level crossing failures, and incidents involving persons. Despite multiple measures being implemented to prevent this last type of incident, it continues to cause significant delays; however, compared to 2024, the number has decreased. On a positive note, due to the implementation of the European Train Control System (ETCS), the number of incidents involving signals passed without permission on main lines is declining, as are the delays caused by such incidents.

#### **Germany**

In 2025, the German network again experienced a high number of construction and maintenance works, which had a noticeable impact on operations along RFC NS-B. The works included major planned projects, such as the construction of a third track in Emmerich and works in the Elbe Valley, both of which took place in various phases throughout the year. Since August 2025, the rehabilitation of the Hamburg–Berlin line has also added a significant burden on diversionary routes. In addition to these major TCRs, several smaller works caused regional restrictions, requiring operational adjustments.

Furthermore, temporary capacity restrictions at cross-border sections and key corridor routes resulted in recurring diversions and longer running times, negatively affecting punctuality. Various unplanned events, such as infrastructure disruptions, further impacted traffic quality. Notably, two major incidents occurred in September: the signal box fire in Gerwisch and the ICM case following the train derailment at Emmerich station, which lasted for almost 14 days.

**Czech Republic:** The punctuality on the SŽCZ network in 2025 was influenced by capacity restrictions due to reconstruction works on the network, mainly the extremely limited

capacity in the Elbe Valley. Another main delay reason is the formation of trains by railway undertakings at origin (late train ready message at origin, handover at origin, loading issues, late loading). Less important factors influencing punctuality are rolling stock issues, maintenance works on the network affecting capacity, and infrastructural breakdowns.

### **Poland**

There were no significant delays affecting freight traffic in 2025 on the PLK S.A. network regarding the RFC NS-B lines. The level of rail freight punctuality remained stable, with average performance comparable to that of previous years. The main causes of delay in international freight traffic included rolling stock failures, occupied station tracks, the transfer of rolling stock between trains and late notifications of readiness for departure. Delays attributable to PLK S.A. acting as the Infrastructure Manager have been primarily related to emergency closures of routes or station tracks.

### **Lithuania**

In 2025, Lithuania's railway punctuality reached 86,3%, reflecting a slight decrease compared to 2024. No major incidents were reported during the year, and the ongoing electrification project on most of the main lines did not significantly impact punctuality, as capacity requests were adjusted accordingly.

The busiest RFC border section in Lithuania is Mockava – Trakiszi, and delays there are notably decreasing due to improved operational planning, enhanced real-time information exchange, and optimized timetable coordination between IMs.

The Joniškis – Meitene border section performed even better than in 2024, with an increase in punctuality and at the Turmantas – Kurcums border section, traffic levels remained stable and did not affect punctuality.

### **Latvia**

In 2025, punctuality on the Latvian network remained high and even increased slightly compared to 2024. At the Lugazi – Valga border, punctuality remained at the same level as in 2024, reaching 98%. At the Meitene – Joniškis border, punctuality increased to 99%, representing a 7% increase compared to 2024. On the diversionary line (Kurcums – Turmantas border), there were only eight trains in total, all of which were 100% punctual. The most common causes of delays were locomotive breakdowns and other issues related to RUs, as well as external factors. Only one delay was related to the IM.

### **Estonia**

Overall, punctuality at the Valga –Lugazi border station remained very high, as there is ample available capacity at this border section and across the Estonian Railways network in general. The main causes of the very few freight train delays were technical failures of vehicles or locomotives, as well as the prioritization of passenger trains in traffic. Despite these limited cases, the overall punctuality of both passenger and freight trains in Estonia exceeded 99% in 2025.

## 2.3 IMPLEMENTATION PLAN

In July 2025 the first Implementation Plan for the new RFC NS-B in line with the amended RFC Regulation. was published, 6 months before becoming operational in January 2026. As of then, the railway freight lines of the corresponding European Transport Corridor (ETC), as defined in the TEN-T Regulation, form the RFC. The ETC NS-B passes through 10 countries: the Netherlands, Belgium, Germany, Poland, Lithuania, Latvia, Estonia, Finland, Sweden and Ukraine.

The Implementation Plan describes the new routing of the Corridor and the characteristics of the lines as well as the new governance. It also includes the executive summary of the Transport Market Study, outlines the strategic measures and actions required to enhance the performance, the capacity and the quality of this vital East-West Corridor and introduces the operational TEN-T KPIs, apart from the other KPIs that will be monitored. The Implementation Plan was elaborated taking into account the common structure developed by all RFCs under the umbrella of RailNetEurope (RNE).

The Advisory Groups of RFC NS-B were first consulted on the infrastructure and investment needs of the Corridor as input to the Work Plan of the European Coordinator. Basis for that consultation was the project list received from the European Coordinator. The consultation was launched on the 11.04.2025 and lasted until 13.05.2025. After that, the draft Implementation Plan was consulted with the Advisory Groups, applicants and other stakeholders; the outcome of both consultations was included in a dedicated chapter of the Implementation Plan. After being approved by the Executive Board it was published on the [RFC NS-B website](#).

## 2.4 CROSS-BORDER PROJECTS

The Quality Circle Operations (QCO) program aims to enhance international rail freight performance at key European border crossings. Focusing on borders with high freight volumes, QCOs bring together Infrastructure Managers (IMs), Railway Undertakings (RUs), and other operational stakeholders to jointly identify bottlenecks and implement targeted improvements. Activities include regular workshops, cross-border coordination calls and the development of improvement measures.

In 2025, QCOs further concentrated on several major border points of RFC NS-B:

The border crossing Bad Bentheim – Oldenzaal involves significant process steps such as locomotive and driver changes and extensive wagon checks. Although no regular teleconferences were held due to the 80-week closure of Emmerich-Oberhausen in 2025, the dwell time on the border crossing was further monitored. Further QCO actions included also the monitoring of the minimum order criteria, the use of the check-in process and the enhanced bilateral coordination during the long Emmerich line closure. This made it possible to achieve significant improvements of the dwell time, even though Bad Bentheim had to take on additional traffic from Emmerich. International telcos and multi-border workshops will also continue after the closure to strengthen the cooperation.

With around 17.500 trains per year, the border crossing Frankfurt (Oder) – Rzepin remains a critical one. Regular coordination between DB InfraGO and PLK S.A. through QCO activities have also contributed to improve dwell times, supported by border coordinators and enhanced data exchange. Plans for 2025 included intensified cooperation between control centres and digital transmission of slow-speed zones.

Finally, the QCO Bad Schandau – Děčín addressed capacity constraints affecting the German – Czech border crossing handling over 30.000 trains annually. Weekly coordination with SŽCZ, improved communication channels, and harmonized safety certification have advanced operational reliability. Forecast data exchange improvements and a dedicated QCO workshop took also place in 2025.

Overall, the QCO program continues to deliver measurable operational improvements, strengthened cross-border cooperation, and enhanced capacity management across Europe's major freight corridors.



**Platform with freight train at Frankfurt (Oder) station**

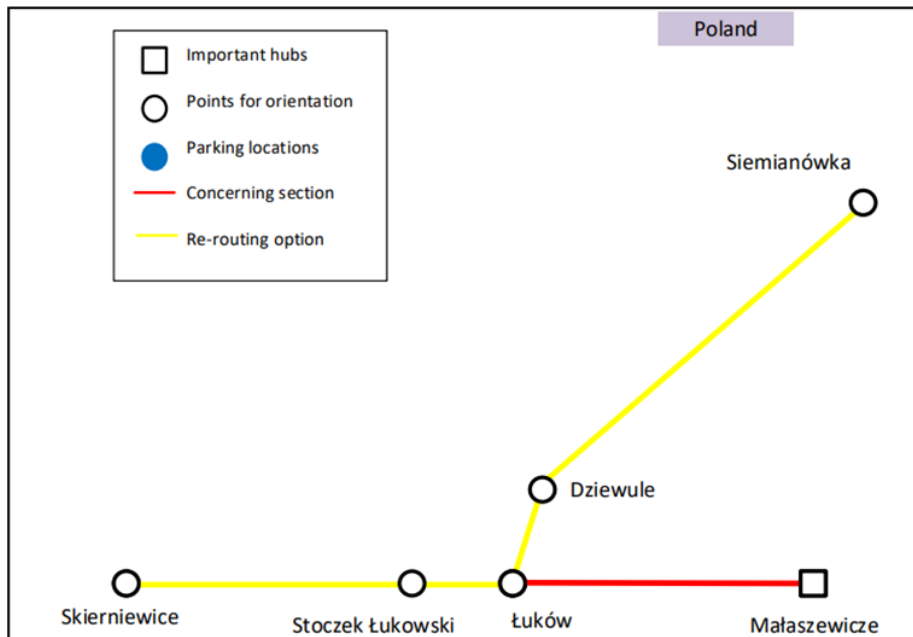
*Photo: RFC NS-B Office*

## 2.5 INTERNATIONAL CONTINGENCY MANAGEMENT

RFC NS-B coordinated one ICM incident that took place in 2025. Due to the closure of the border traffic between Poland and Belarus by governmental decision between 12<sup>th</sup> of September and 24<sup>th</sup> of September, complete suspension of the train traffic at the following railway border crossings took place:

- Kuźnica – Grodno
- Siemianówka – Świsłocz
- Terespol – Brest.

The ICM case has been declared by PLK S.A. for RFC NS-B. Although this situation qualified more as a “crisis situation” than an actual ICM case, it was decided to apply the ICM rules as foreseen in the ICM Handbook. When the section Łuków – Małaszewicze is blocked, the re-routing is normally foreseen via the other border with Belarus (Siemianówka). However, due to the extraordinary situation all borders between the two countries were closed and no re-routings options were possible on short notice.



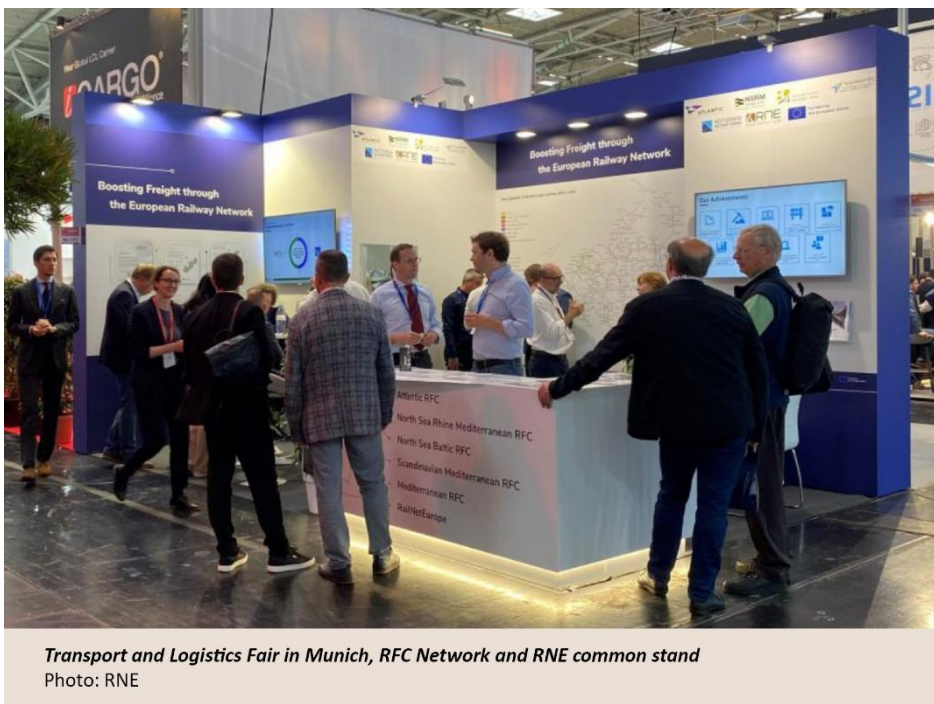
In 2025, the RFC NS-B was also involved in a case on RFC North Sea - Rhine - Mediterranean. The ICM was initiated by DB InfraGO on 19<sup>th</sup> of September 2025 after the derailment of a freight train leaving the station Emmerich (DE) towards Zevenaar (NL) – one of the busiest border sections between Germany and the Netherlands. The derailment of the train damaged a level crossing as well as several switches which led to a total closure of the track for nearly 14 days. All restrictions were lifted on 1<sup>st</sup> of October 2025. During the incident, all traffic, freight as well as passenger, was handled via Venlo. Only regional services resumed operations earlier in one direction.

Additionally, in 2025 RFC NS-B started to update the re-routing scenarios taking into account the new alignment of the Corridor as of January 2026.

## 2.6 EVENTS

### 2.6.1 Transport and Logistics Fair in Munich

In 2025, RFC NS-B together with several other RFCs and RailNetEurope (RNE) participated in the Transport and Logistics Fair, that took place between the 2<sup>nd</sup> and 5<sup>th</sup> of June in Munich. The RFCs and RNE shared a common stand in the exhibition hall. It was a great opportunity to get in contact with potential customers, investors, EU institutions and partners from transport sector. RFC NS-B was represented by Management Board Members, Project Implementation Managers, the Managing Director and the C-OSS Manager, who discussed the capacity offer, RFC's activities on international contingency management, performance management and cross-border interoperability with the existing and potential customers.

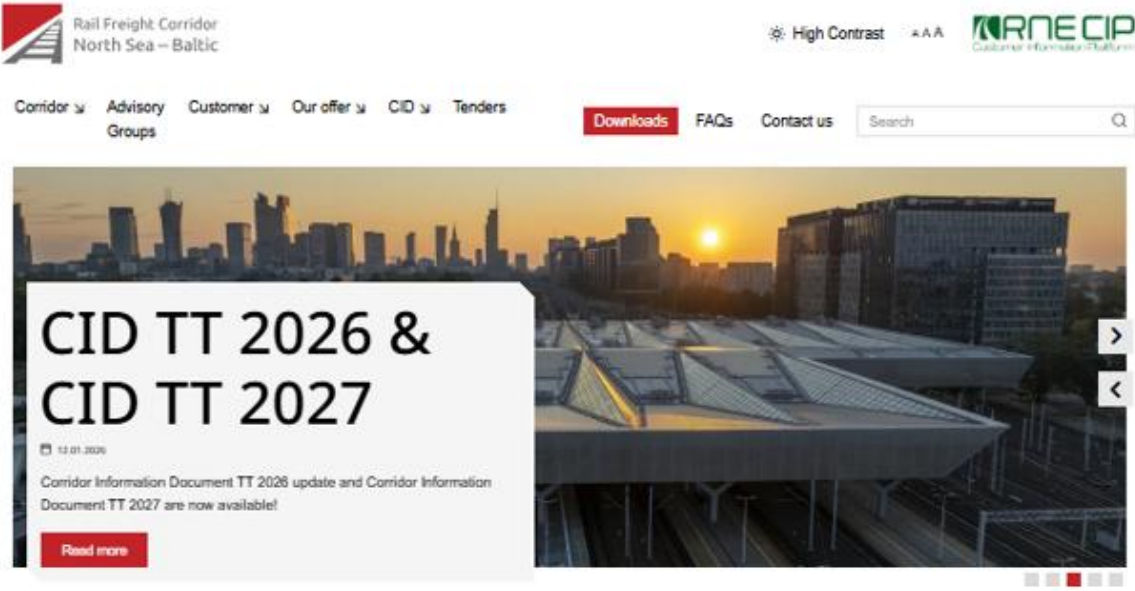


### 2.6.2 Customer Conference of DB InfraGO AG and PLK S.A in Legnica

The fifteenth Customer Conference of DB InfraGO AG and PLK S.A. took place on 5<sup>th</sup> of November 2025 in Legnica. Among others, the topic of regional rail transport between the Lower Silesian Voivodeship and Saxony, Berlin and Brandenburg and electronic registration and issuance system for warnings were presented. The participants were also provided with the current information regarding the implementation of DB InfraGO AG and PLK S.A. projects and the state of play on the improvement of the quality of services provided by PLK S.A. by implementing new IT solutions.

### 2.7 RFC NS-B NEW WEBSITE

In 2025, the new [RFC NS-B website](#) was developed and the rebranding of the RFC took place following the amended RFC Regulation and to take into account the new alignment. The new RFC NS-B website is designed to be more user-friendly, aligned with industry trends and EU accessibility standards.



## Rail Freight Corridor North Sea-Baltic – Your East West Rail Bridge across Europe

Rail Freight Corridor North Sea – Baltic (RFC NS-B) became operational on the 10th of November 2015 according to Regulation (EU) No 913/2010 of the European Parliament and of the Council of 22 September 2010 concerning a European rail network for competitive freight (hereinafter: the RFC Regulation). Over the years the Corridor was gradually extended to Riga and Tallinn (October 2020) and to Medyka and the ports of Gent/Terneuzen and Zeebrugge in January 2022. In 2024, the Regulation was amended by the revised TEN-T Regulation (EU) 2024/1679 (hereinafter: TEN-T Regulation), that identifies nine European Transport Corridors (ETC). The RFCs are now the freight railway lines of the corresponding ETCs. The map of the RFC is displayed below.

The RFC NS-B passes through seven countries: the Netherlands, Belgium, Germany, Poland, Lithuania, Latvia and Estonia. It stretches from the North Sea ports in Belgium, the Netherlands and Germany to Poland and continues north through Lithuania, Latvia and Estonia. To the South, the corridor extends from Berlin and Warsaw via Lublin to Dorohusk and from Magdeburg via Wrocław to Katowice to Medyka. Eastern branch goes from Warsaw to Kaunas, then to Riga and Tallinn. RFC NS-B includes more than 9000 km of railway lines and connects the most important North Sea ports with Central Europe and the Baltic States providing a rail bridge between Eastern and Western Europe.



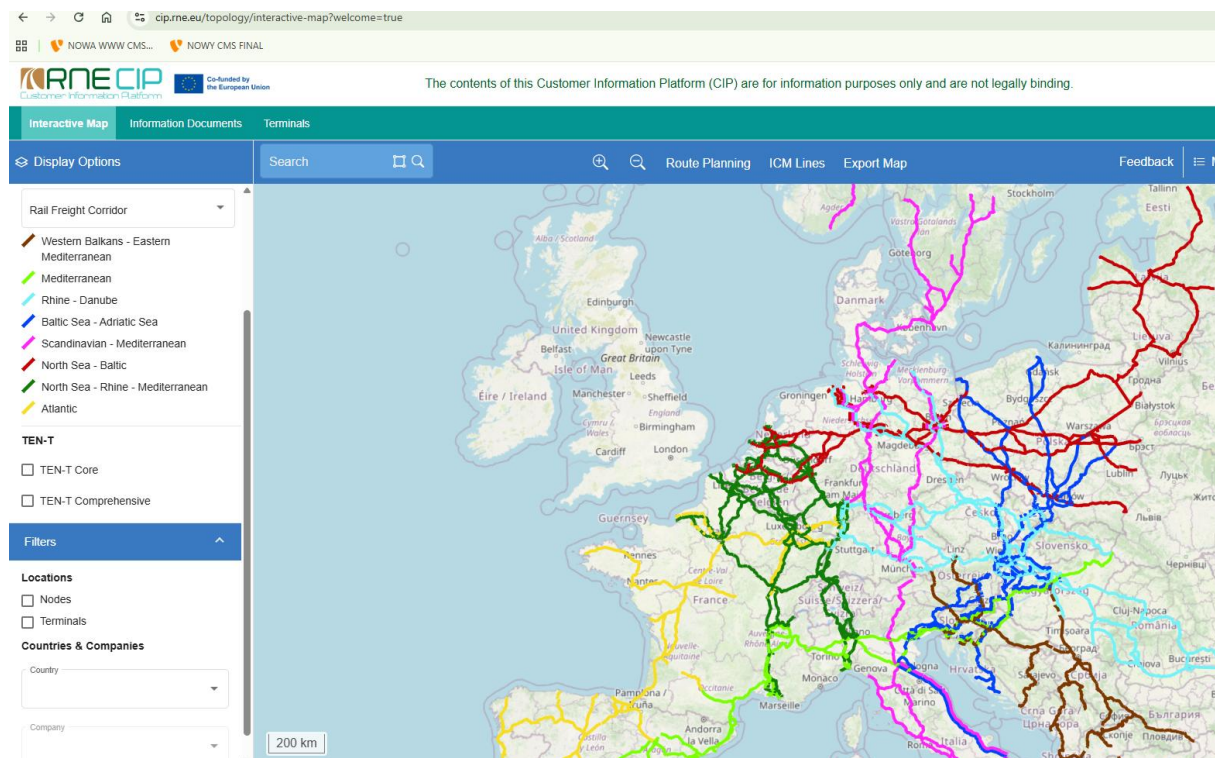
### 3. COOPERATION WITH OTHER STAKEHOLDERS

#### 3.1 RAILNETEUROPE

RFC NS-B is an associate member of RNE and continued to cooperate closely with other RFCs in view of the harmonization and development of services under the RNE umbrella (see chapter 3.2). In 2025, RFC NS-B representatives participated in two RNE General Assembly meetings and two RFC/RNE High Level Meetings, in preparation of the GA. RFC NS-B applies RNE services and guidelines as well as the RNE IT tools, such as PCS, TIS, CIP, and the Network and Corridor Information (NCI) System.

#### Customer Information Platform

The [Customer Information Platform](#) is an interactive, Internet-based tool, which provides customers and users of the Corridors with information on railway infrastructure in 26 European countries, covering the complete network of RFCs. In 2025, RNE continued work on the development of the digital Railway Infrastructure System (RIS), which is the basis for CIP. As in previous years RFC NS-B together with other RFCs under coordination of RNE was working on the development of the existing and new functionalities in CIP. In 2025, the main goal was to introduce the new corridor alignment to be published in January 2026.



More information regarding CIP can be found on RNE [CIP information subpage](#).

#### Railway Infrastructure System

In 2025, RNE and RFC representatives continued developing the [Railway Infrastructure System](#). RIS is a digital platform designed to simplify and improve the management of infrastructure railway data of the Infrastructure Managers (IMs) in Europe. RIS combines previously existing systems into one platform: Central Reference Files Database (CRD), Customer Information

Platform and Rail Facilities Portal (RFP) using data from the Register of Infrastructure (RINF), hosted by the European Union Agency of Railways.

### **Network and Corridor Information System**

In 2025, the RFCs and IMs under the RNE umbrella continued work on the [Network and Corridor Information Portal](#) (NCI), which is a free of charge, digital solution to provide information on Network Statements (NS) and Corridor Information Documents (CID). The major re-development in 2025 was the migration of NCI into the Railway Infrastructure System and improvement of the visual and functional side of the platform in order to develop a new NCI with improved layout.

### **Railway Collaborative Decision Making pilot project**

In 2025, RNE, RUs, TAGs and RFC representatives, supported by consultants, continued work on the RNE Railway Collaborative Decision Making pilot project. The aim of the project is the elaboration of the R-CDM Handbook and the development of the R-CDM tool as a common platform. RFC North Sea – Rhine - Mediterranean volunteered to have the pilot on its Corridor. The RFCs are acting as observers at the moment but are considered as important link between the stakeholders of the project in the future.

## **3.2 RFC NETWORK**

The RFC Network is a platform for cooperation of Rail Freight Corridors. It consists of the Managing Directors and Chairpersons of the Management Board of the RFCs with RNE representatives invited to participate as observers. The RFC Network is supported by the RFC Network Assistant, Nuria Pérez Brandón. In 2025, four online and two physical RFC Network meetings were organized in which RFC NS-B participated. The major topic discussed was the future of the RFCs, including the cooperation with the European Coordinators, and the TEN-T operational KPIs. The joint work on the 740m train methodology was an important topic of the meetings. The C-OSS Community topics were also presented. Additionally, the aim of the ad-hoc RFC Network telco organised in January was to agree on a harmonised approach when it comes to how the new corridor alignment should be mapped in the Customer Information Platform. The RFC NS-B representatives have been involved in the elaboration of several projects, among others the C-OSS Community and RFC Marketing Working Group activities and the preparation of the joint participation of the RFC Network and RNE in events and conferences.

### **3.2.1 Joint Meeting RFC Network – ECCO**

The joint online meeting of the RFC Network and Efficient Cross Corridor Organisation (ECCO) which brings together RAG Speakers from all RFCs took place on 10<sup>th</sup> of October 2025.

The RFC NS-B RAG Speaker participated in the meeting. The European Transport Market Study 2025-2027 was presented. Among others, the following topics were presented: a possible update of the ICM RNE Handbook aligned with the RUs ICM handbook, best practices and operational priorities (dwell time, punctuality and long trains). The participants also discussed

the cooperation among RFC Managing Directors and RAG Speakers with the European Coordinators and exchanged views on the new Memorandum of Understanding for RAG Speakers.

### **3.2.2 Joint meeting RFC Network - UIRR**

The RFC Network, the International Union for Road-Rail Combined Transport (UIRR) and TAG Speakers meeting took place on 5<sup>th</sup> of November 2025 in Vienna. Among others, topic of RNE Project 'Rail Collaborative Decision-Making' and Rail Facilities Portal migration to RIS were presented. The participants also discussed cooperation between RFCs and TAGs. The participants were also provided with the information regarding the door-to-door rail freight performance monitoring.

### **3.3 REGULATORY BODIES**

The annual meeting with the Regulatory Bodies (RB) of the Corridor took place online on the 28<sup>th</sup> of January 2025. It was the first joint meeting of RFCs Rhine-Danube and North Sea – Baltic. During this meeting, the C-OSS Manager provided information about the results of the allocation process for TT2025, as well as the preparation of the capacity offer for TT2026. The challenges on RFCs were presented, Czech withdrawal and new members joining. Among others the participants discussed:

- Dwell Times at border sections
- TCR coordination and consultation (Annex VII implementation)
- Draft regulation on the use of railway infrastructure capacity – enhanced role of RBs
- Cooperation with terminals

Additionally, a report about the main conclusions of the User Satisfactory Survey 2024 was discussed.

## **4. EUROPEAN TRANSPORT CORRIDOR NORTH SEA – BALTIC**

In 2025, RFC NS-B continued to work with the European Coordinator of its corresponding North Sea-Baltic ETC. The North Sea-Baltic ETC Forum met twice in 2025.

On 25<sup>th</sup> of June 2025, the main subject discussed was the Work Plan structure. Among other topics that were dealt with were the synergies between transport and energy systems and the Rail Baltica project. The CINEA representatives presented state of play of subsidies. Additionally, an update on the European affairs was presented by the ETC Advisor.

On 17<sup>th</sup> of November 2025, a further state of play of NS-B ETC Work Plan structure and an update of the European affairs was given, including the upcoming publication of the Military Mobility package. Additionally, the Central Communication Port (CPK) Programme in Poland and Clean Transport Corridor initiative were presented.



*Freight train at Gdańsk Stadion Expo station*  
*Photo: PLK S.A.*

## 5. OUTLOOK 2026

Looking ahead to 2026, the European rail sector is set to enter another decisive phase of regulatory and operational developments. During the year, several new legislative acts will be published and enter into force, which will influence the work of the Corridor.

A major milestone for the European rail sector will be the expected publication of the Capacity Management Regulation that repeals the RFC Regulation from December 2030. The new framework will fundamentally reshape the planning, allocation and management of railway capacity across Europe, introducing a significantly more centralised and harmonised approach to international capacity coordination. Its implementation will represent one of the most far-reaching changes to the functioning of the railway sector in recent decades and will require substantial operational, organisational and technical adjustments from all actors involved.

The Capacity Management Regulation is expected to significantly enhance the efficiency and predictability of international rail traffic management, while at the same time requiring a high level of standardisation and interoperability across all participating infrastructure managers and allocation bodies.

This Regulation is also expected to introduce a more structured and harmonised performance management framework across the European railway network. In particular, greater emphasis

will be placed on punctuality, traffic management efficiency, capacity utilisation and the coordinated handling of disruptions, supported by common performance indicators.

For Rail Freight Corridors, including RFC North Sea – Baltic, the new framework will also mark the beginning of a gradual transition towards a different governance model for international rail coordination. While the future role of RFCs remains unclear, the experience and expertise developed over many years of corridor cooperation will remain valuable during the implementation phase. RFC NS-B will continue to contribute its operational know-how, support coordination activities where appropriate, and, where requested, carry out tasks on behalf of the future Network Coordinator. Until the expiry of the current RFC framework in 2030, RFC North Sea – Baltic will continue to operate as the rail freight component of the European Transport Corridor.

In parallel, 2026 will also see the entry into force of the Regulation establishing a framework of measures to facilitate military transport. This initiative reflects the growing importance of mobility in a broader strategic and security context and underscores the role of rail freight corridors in ensuring both civilian and military logistical readiness. The Corridor will contribute, within its mandate, to enabling efficient and coordinated transport flows that support these objectives.

Finally, next year's Annual Report will be the first one for the new alignment of RFC NS-B and will include the reporting on the operational TEN-T KPIs (dwell time and punctuality at arrival). The full Performance Report will no longer be published as a separate document, but will be an integral part of the Annual Report. It will also include a dedicated section presenting the views and assessment of the performance of the Corridor by the Advisory Groups, as foreseen in the amended RFC Regulation.

## List of Abbreviations

AB – Allocation Body

AG – Advisory Group

CID – Corridor Information Document

CIP – Customer Information Platform

C-OSS – Corridor One-Stop-Shop

CPK - Central Communication Port Programme in Poland

CRD - Central Reference Files Database

DAC - Digital Automatic Coupling

EC – European Commission

ECCO - Efficient Cross Corridor Organisation

EEIG – European Economic Interest Grouping (EZIG in Polish)

ERA – European Union Agency for Railways

ETA - Estimated time of arrival

ETC - European Transport Corridor

ETCS - European Train Control System

EU – European Union

ExBo – Executive Board

HaP- Harmonized PaPs

ICM – International Contingency Management

IM – Infrastructure Manager

KPI – Key Performance Indicator

MB – Management Board

NCI - Network and Corridor Information System

NExBo – Network of Executive Boards of RFCs

NS – Network Statement

PaP – Pre-arranged Path

PCS – Path Coordination System

PIM – Project Implementation Manager

PMO – Project Management Office

QCO – Quality Circle Operations

RAG – Railway undertaking Advisory Group

RB – Regulatory Body

RC – Reserve Capacity

RFC BA - RFC Baltic-Adriatic

RFC NS-B - Rail Freight Corridor North Sea – Baltic

RFC OEM – Rail Freight Corridor Orient/East-Med

RFC RD – RFC Rhine-Danube

RFP - Rail Facilities Portal

RIS - Railway Infrastructure System

RNE – RailNetEurope

RU – Railway Undertaking

TAG – Terminal Advisory Group

TCR - Temporary Capacity Restriction

TEN-T - Trans-European Transport Network

TIS – Train Information System

TT – Time Table

UIRR – International Union for Road-Rail Combined Transport

WG – Working Group

ŽSR - Železnice Slovenskej Republiky

