



# Rail Roadmap 2030

Une offre de fret ferroviaire élargie  
dans un système de transport intelligent et multimodal

Voor meer goederenvervoer per spoor dankzij een intelligent en  
multimodaal vervoerssysteem

17 / 08 / 2021

# Rail Roadmap 2030 : project participants

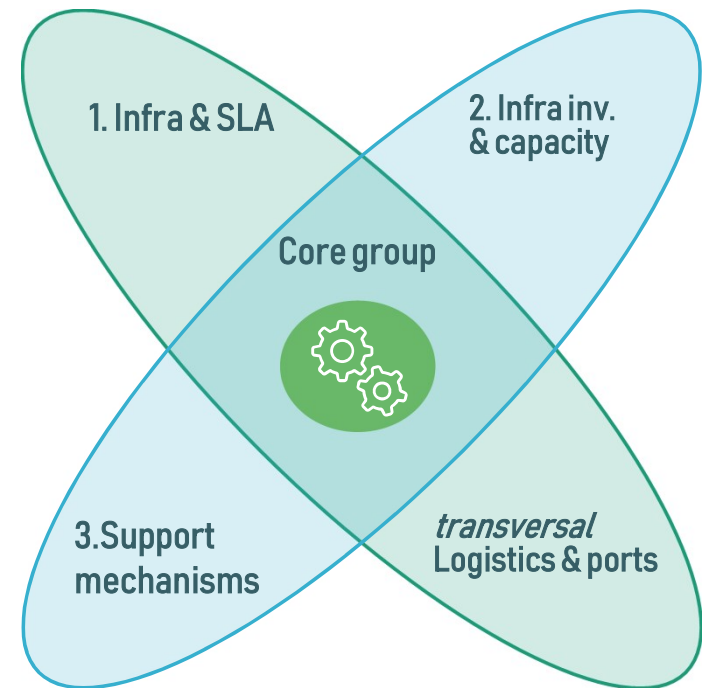
The project involved many stakeholders which contributed to different project workgroups

## SteerCo

- Cabinet Gilkinet, Peeters, Henry, Van den Brandt, Maron / Trachte
- FOD Mobiliteit, MOW Vlaanderen, SPW Mobilité, Brussel Mobility
- VBO-FEB, VOKA, UWE
- Universiteit Antwerpen
- Infrabel
- Belgian Rail Freight Forum (BRFF)

## Stakeholders

- Agoria
- Beci
- Essenscia
- Febetra
- Multimodaal Vlaanderen
- Wallonia Logistics
- Vlaamse Waterweg
- Alfaport, APZI, VEGHO (transv.)
- Railport & PoA
- North Sea Port
- Terminal Container Athus (TCA)
- Bewag





# Rail Road Map 2030

1

Context & Ambition

2

The infrastructure manager at the center of the game

3

Proactive authorities

4

Commitment of the Rail operators

5

Regulatory body

6

Structured consultation between the actors

7

European harmonization and cooperation



## 1

# Opportunities and challenges in the railway sector

- most efficient, long distance mode ;
- massification potential on EU & Bel level ;
- extensive as-is infrastructure network ;
- various societal benefits (vs road).

## STRENGTHS

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## OPPORTUNITIES

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- outspoken government ambitions ;
- volume potential for modal shift ;
- innovation through digitalization ;
- transforming the role of the IM.

- high costs for <300km distance rail freight
- lack of flexibility & interoperability ;
- deferred maintenance of the network ;
- complex legislative & regulatory context.

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## WEAKNESSES

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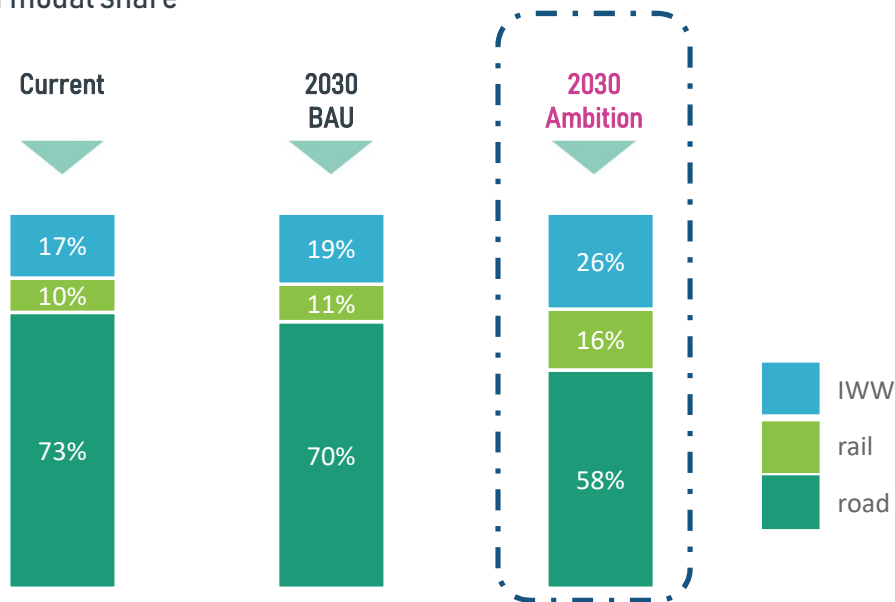
## THREATS

- sluggish regulatory framework ;
- complexity of multi-actor collaboration ;
- (further deepening of an) unequal level playing field between transport modes.

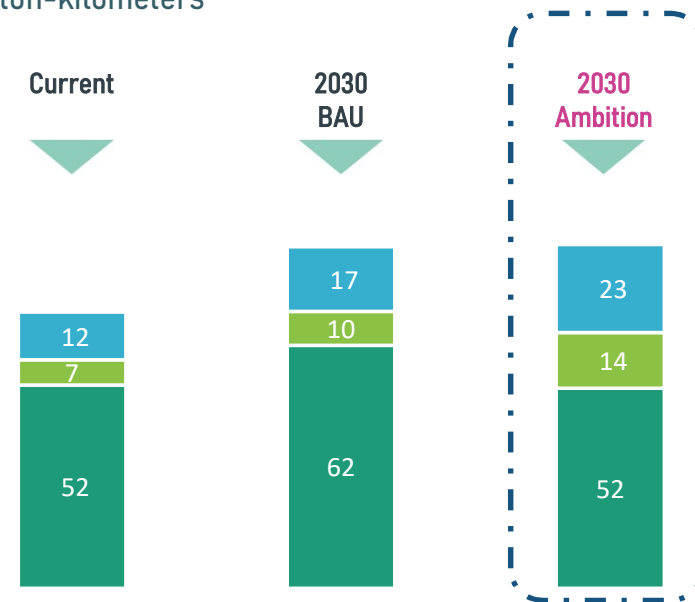
## 1

# Joint ambition for the transport & logistics sector

Traffic evolution  
in % of modal share



Traffic evolution  
in bn ton-kilometers

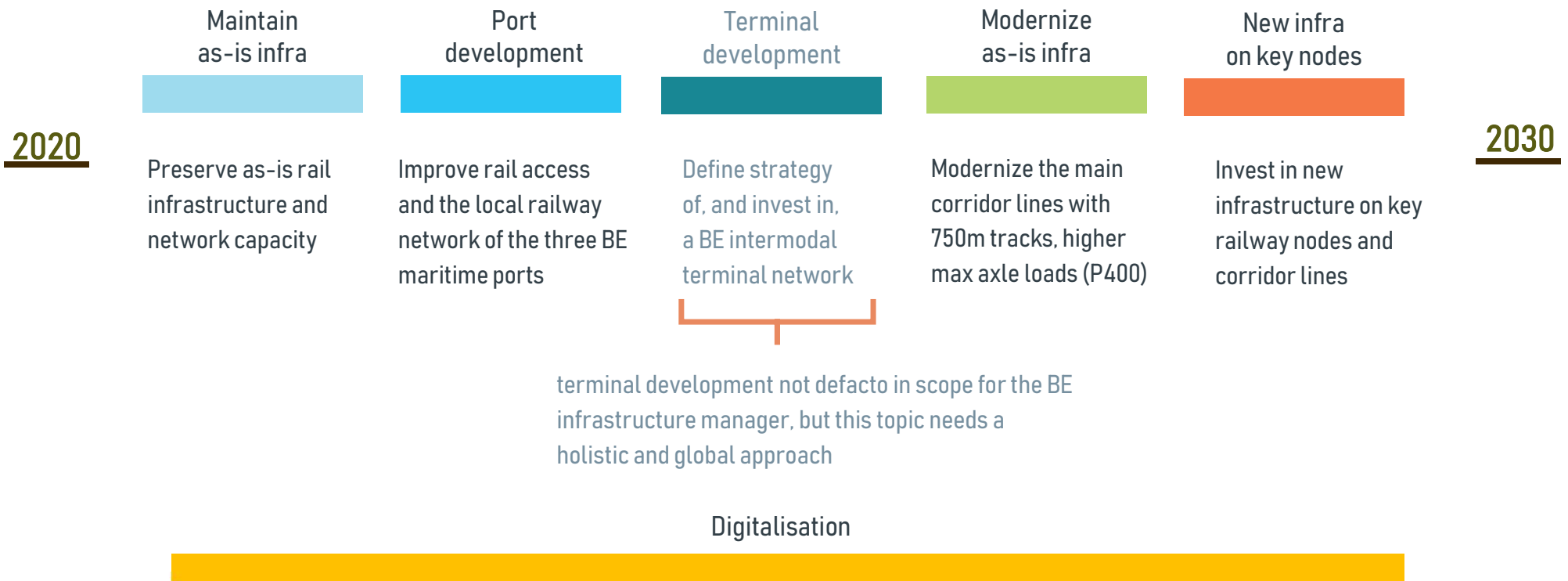


Still, the rail sector believes it is possible to raise its modal share to 16% by capturing a larger share of the forecasted growth in demand

# 2

## The infrastructure manager at the center of the game

NETWORK CAPACITY NEEDS TO BE IN LINE WITH OUR VOLUME AMBITION, REQUIRING TARGETED INVESTMENTS



## 2

# The infrastructure manager at the center of the game

## ETCS onboard deployment

- One onboard unit to operate on main international freight relations with technically harmonized ERTMS lvl3.
- 
- ✓ Higher punctuality due to less failures of trackside signaling ;
  - ✓ Decrease on infrastructure maintenance cost ;
  - ✓ Higher safety.

## digital capacity management

- Step-change to automated and digitized train path construction and allocation. Expansion to rail-time capacity management.
- 
- ✓ Reduced travel time, better reliability (train path quality) ;
  - ✓ Improved utilization of assets, drivers and rail path engineers ;
  - ✓ Increased capacity.

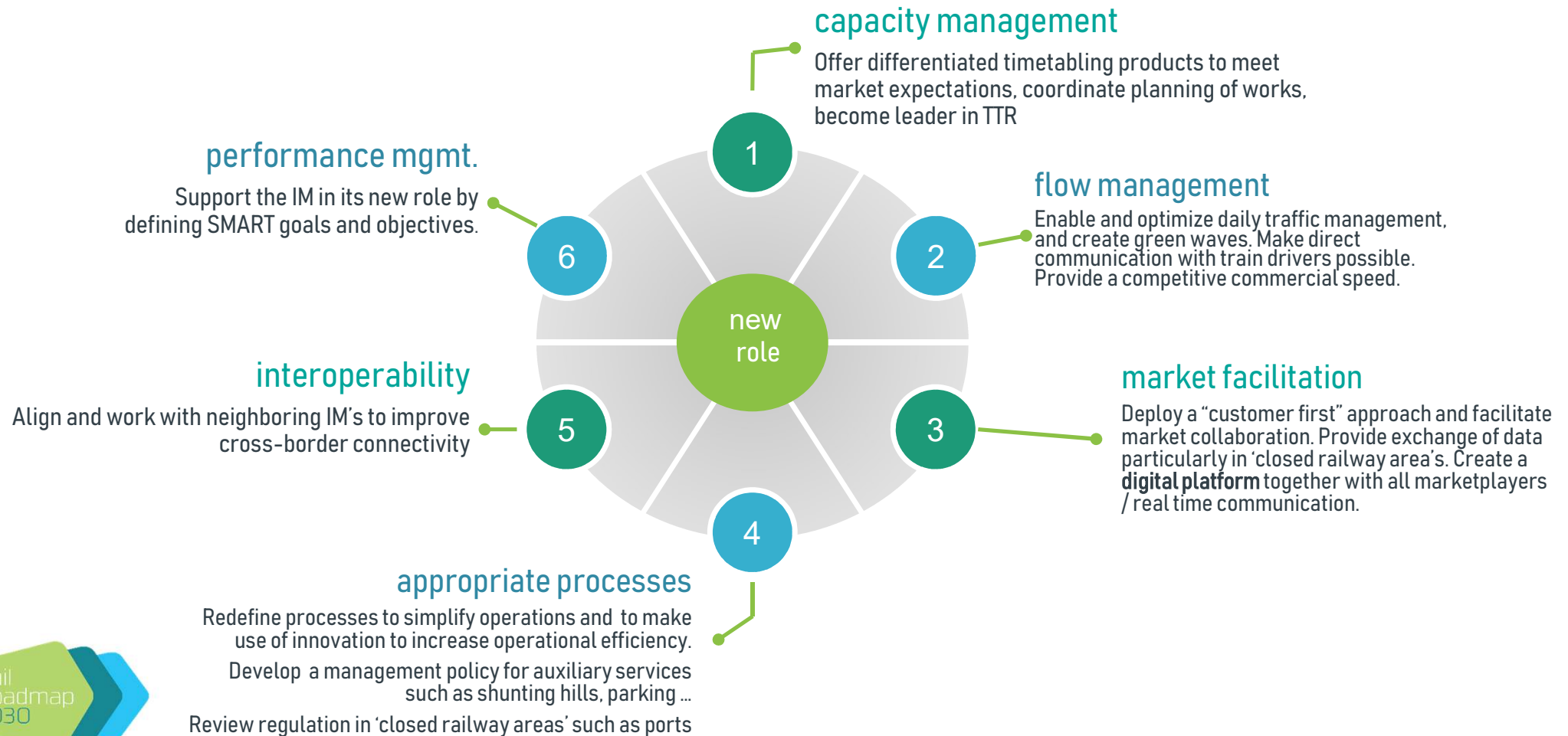
## data collection technologies

- Invest in data detection technologies such as camera gantries, scanners ...
- 
- ✓ Better reliability & quality for customers
  - ✓ Improved utilization of assets & infrastructure
  - ✓ Improved maintenance

## 2

# The infrastructure manager at the center of the game

to assure network capacity, market cooperation and cross-border connectivity





# 3

## Proactive authorities

1

**New management contract with the infrastructure manager**

2

**10 years investment plan for the infrastructure manager**

3

**Simplify and modernise regulations**

more pragmatic, customer-oriented rules allowing the use of modern technologies & specific rules for closed areas

4

**Financial support where needed**

5

**Independent driver training school**

# 3

## Proactive authorities

How to reduce the consolidation cost in Belgium ?

1

Cost reductions & productivity gains through better Infrastructure & capacity management

2

Cost reductions & productivity gains by Railway Companies

3

Internalisation of external costs in line with the EU

4

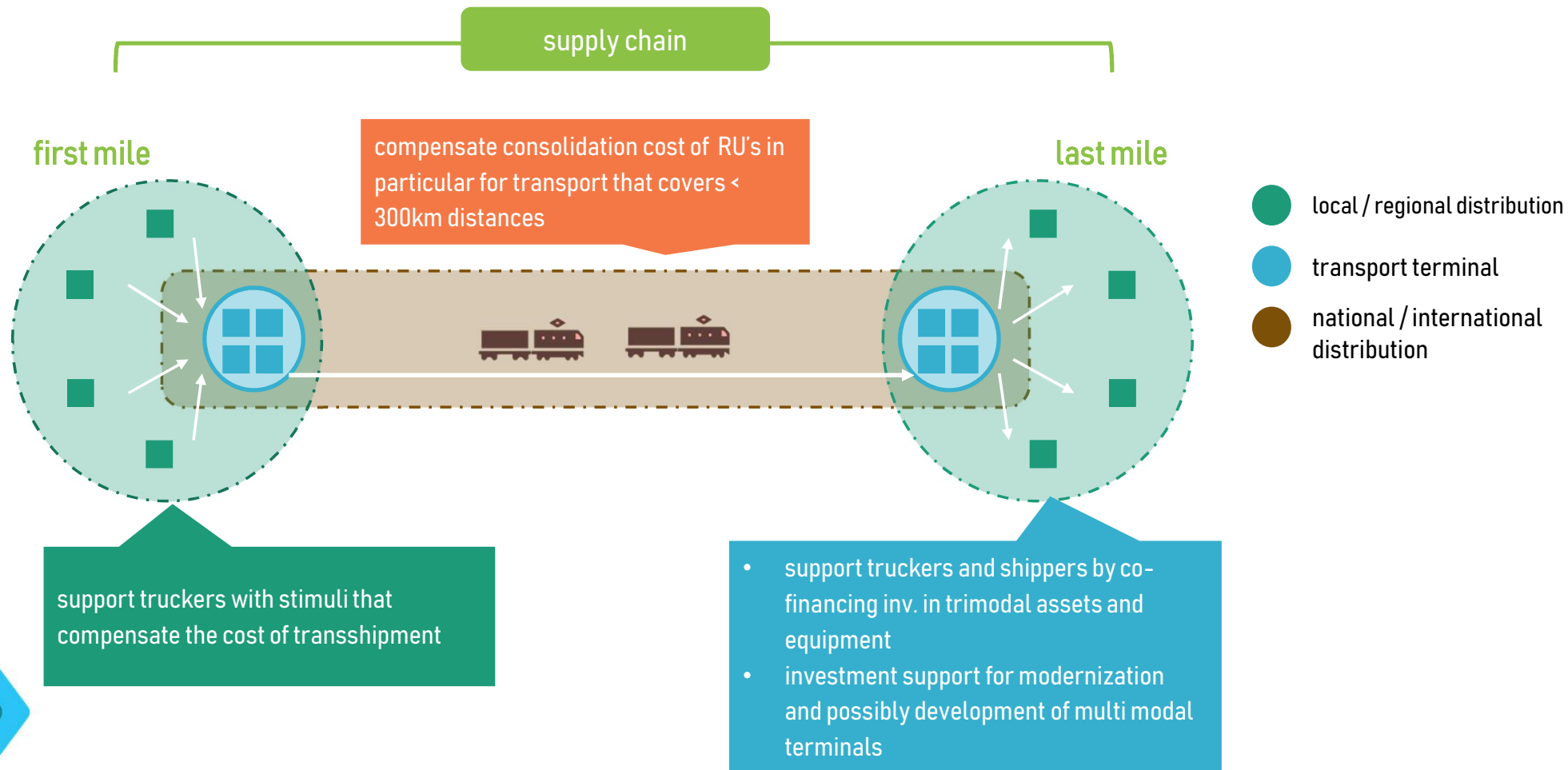
**Consolidation / massification of volume by supporting :**

- **Shunting** : Composing trains equivalent to 50 trucks requiring marshalling of wagons etc
- **First & Last Mile** : < 15 km required to deliver door to door service by rail or other mode
- **Feeder network** : < 150 km trains need support to sustain a sufficient fine maize network within Belgium
- **Transshipment** : extra handling required to put goods on/off rail from other transportmodi

# 3

## Proactive authorities

An end-to-end approach for government support



## 4 Commitment of the Rail Operators

1

**Communication of data**

2

**Innovative offer adapted to the market**

3

**Digital transformation**

Digital automatic coupling, autonomous train, digital platform, ERTMS,...

4

**Increase collaboration between rail operators and with other modes of transport**

5

**More standardised contracts**

5

## Regulatory body

1

**Benchmark with other countries and sectors**

2

**Reexamine mission, role & resources**



## **6-7** interaction & harmonisation

1

**User's group**

2

**Advisor's committee including shippers & multimodal platforms**

3

**Intense co-operation by Infrabel with neighbouring IM's**

4

**Active role of Infrabel & Gov. in crossborder harmonization**

# Conclusions

2023

2025

2030



Conclusion contrat performance Infrabel (GF)



Nouvelle politique des sillons (GI)



Politique de coordination belge & intern. des travaux (GI)



Nouvelle politique des services auxiliaires (GI / EF)

Simplification des opérations (GI / EF)

Précurseur TTR (GI)

DCM (GI / GF)

TTR (GI)

Coordination belge & intern. des travaux (GI)

ATO Local (EF)

DAC (EF / EU / GF)

Gestion des flux (GI)  
- Gestion dynamique  
- Vagues vertes  
- Vitesse commerciale compétitive

ERTMS (GI / EF)

Programme soutenable déploiement ERTMS (EU / GF / GI / EF),

Communication en temps réel entre GI & conducteurs (GI / EF)

Système de collecte de données



Plateforme digitale (GI/ RU/AM/GF/EU)

Moderniser la réglementation (GI / GF)

- Pragmatique & orientée clients  
- Permettant l'utilisation des technologies modernes



Règles pragmatiques et spécifiques réseau secondaire et environnements fermés (GI/GF)

Réexamen mission, tâches et ressources du régulateur (GF)

Concertation (GI / RU / AM / GF)

- Bon fonctionnement du "groupe d'utilisateurs"  
- Mise en place du comité consultatif

Intensifier politique de collaboration avec GI voisins (GI/GF)

Rôle actif d'harmonisation au niveau européen (GI/GF)

# Conclusions

2023

2025

2030

★ Conclusion plan multi-annual d'investissements 10 ans (GF & GR)

★ Catch-up maintenance du réseau (GI)

★ Politique active de maintenance (dont préventive) du réseau (GI)

Politique d'extension de réseau et raccordements (GI)

Politique de modernisation du réseau (GI)

Maintenance (dont préventive) du réseau (GI)

Levée goulets d'étranglement critiques (GI)

Optimiser connections locales sites industriels, plateformes & ports (GI, GF, GR.)

Analyse électrification de certaines lignes (GI)

Équipement pour captage données réseau (ex: portiques caméras) (GI)

740m (GI)

Gabarit P400 (GI)

Achever extensions structurelles (GI)

★ Soutien coûts de consolidation (considérant l'ensemble de la chaîne logistique) (GF / GR)

Stimulation financière déploiement techniques multimodales (considérant l'ensemble de la chaîne logistique) (GR)

Soutien à l'investissement et modernisation terminaux multimodaux (GR)

Réévaluation du soutien pour les coûts de consolidation (GF / GR)

Réévaluation du soutien pour les techniques multimodales (GF / GR)

Développement terminaux multimodaux (GR / AL)

Approche pro-active au niveau européen pour une politique d'internalisation des coûts externes (GF, GR)

École indépendante de conducteurs (GR / EF)

Offre produits adaptée aux besoins des clients & exploitation de nouveaux segments de marché (EF)

Solutions de chargements inférieurs à un conteneur (EF)

Développer une plus grande standardisation dans les contrats (EF)

Mutualisation des moyens des opérateurs ferroviaires à certains endroits (EF)

Renforcement des collaborations entre opérateurs et aussi avec les autres modes de transports (EF / AM)

# Légende

Gestion d'Infrastructure  
& Règlementation

Investissements &  
Digitilisation

Soutien

Opérateurs



Prioritaire

## Qui est responsable ?

GI = Gestionnaire d'Infrastructure  
GF = Gouvernement fédéral  
GR = Gouvernements régionaux  
AL = Autorité ou Agence Local  
EF = Entreprise ferroviaire  
AM = Autres modes de transport  
RE = Régulateur  
UE = Union européenne

# 14 September : Handing of the RRM 2030 to the Ministers

- Momentum (Europe, Government, actors)
- Goal : call of the entire logistic sector
- Suggestions?/ questions?





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## Signed by :

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- APZI,
- Beci
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- Bewag
- Essenscia
- Febetra
- Multimodaal Vlaanderen
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- Cabinet Henry
- Kabinet Peeters
- Kabinet Van den Brandt
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- Brussel Mobility
- MOW Vlaanderen
- SPW Mobilité,
- Infrabel



*Let's modal shift together!*

