





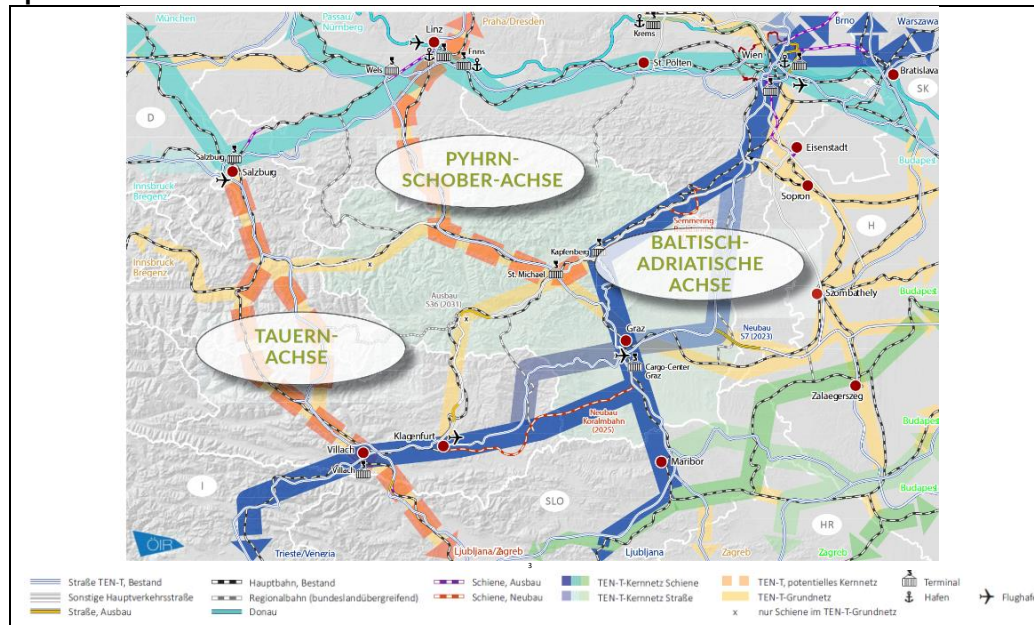


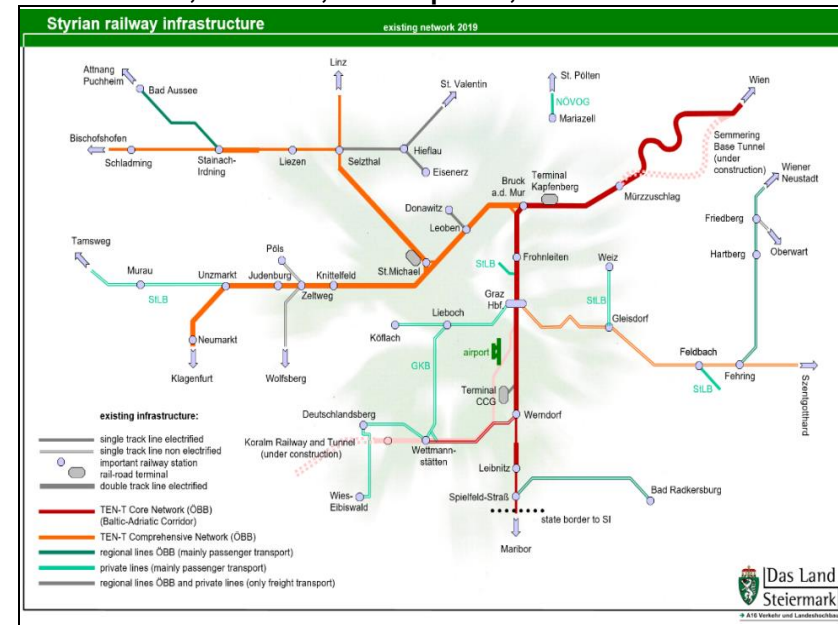
Fact Sheet – Baselinestudy

| | | | | | |
|---|---|---|--|---|---|
| Region | Styria |  | Population 1.243 million inhabitants |  | Part of the TEN-T core network <input checked="" type="checkbox"/> yes <input type="checkbox"/> no |
| Type | Harbour <input type="checkbox"/> Hinterland <input checked="" type="checkbox"/> |  | Catchment area 16.40 km² |  | KV Terminal <input checked="" type="checkbox"/> yes <input type="checkbox"/> no |
|  | Main Industry: automotive, rail systems, steel products, mechatronics and electronics |  | Density 75 people per km² | | Further access points to the railway system: loading points and private feeder lines along the railway lines of ÖBB-Infra, GKB and StLB |

position within the TEN-T core network



Rail network, terminals, access points, electrification



Fact Sheet – Baselinestudy

Further railtransport related descriptions

Commodity groups / Modal split

Alpine crossing freight transport

| | Road | | | | | | | Rail | | | | | |
|-----------------------------------|-----------|------|------|------|------|-------|-------|-----------|------|------|------|--------|-------|
| | Mio. tons | | | | | % | | Mio. tons | | | | % p.a. | |
| | 1999 | 2004 | 2009 | 2015 | 2017 | 04-15 | 99-15 | 1999 | 2004 | 2009 | 2015 | 04-15 | 99-15 |
| Alpine crossing | 1999 | 2004 | 2009 | 2015 | 2017 | 04-15 | 99-15 | 1999 | 2004 | 2009 | 2015 | 04-15 | 99-15 |
| Reschen | 1,2 | 2,0 | 1,2 | 1,2 | 1,0 | -40% | 0% | . | . | . | . | . | . |
| Brenner | 25,2 | 31,1 | 26,2 | 32,4 | 36,3 | 4% | 29% | 8,2 | 10,2 | 13,1 | 13,8 | 35% | 68% |
| Tauern | 8,2 | 12,2 | 12,7 | 13,6 | 15,2 | 11% | 66% | 5,6 | 8,0 | 5,9 | 11,5 | 44% | 106% |
| Schoberpass | 11,2 | 14,6 | 14,3 | 17,1 | 18,8 | 17% | 53% | 4,6 | 5,4 | 4,3 | 4,4 | -19% | -5% |
| Semmering | 4,0 | 5,6 | 4,7 | 5,6 | 5,6 | 0% | 40% | 9,3 | 9,6 | 9,3 | 11,7 | 22% | 26% |
| Wechsel | 8,2 | 8,8 | 10,4 | 15,3 | 16,7 | 74% | 87% | 0,1 | 0,2 | 0,2 | 0,3 | 34% | 221% |
| Schober, Semmering, Wechsel | 23,4 | 29,0 | 29,4 | 38,0 | 41,1 | 31% | 62% | 14,0 | 15,2 | 13,8 | 16,4 | 8% | 17% |
| Total | 58,0 | 74,3 | 69,5 | 85,2 | 93,6 | 15% | 47% | 27,8 | 33,4 | 32,8 | 41,7 | 25% | 50% |

| Alpine crossing | 1999 | 2009 | 2015 | 2018 | 1999-2018 |
|-----------------------------|-------------|------------|------------|------------|-----------|
| | Modal Split | | | | |
| | Share road | Share road | Share road | Share road | |
| Reschen | . | . | . | . | |
| Brenner | 75% | 67% | 70% | 73% | -2% |
| Tauern | 59% | 68% | 54% | 65% | +6% |
| Schoberpass | 71% | 77% | 80% | 81% | +10% |
| Semmering | 30% | 34% | 32% | 35% | +5% |
| Wechsel | 99% | 98% | 98% | 99% | 0% |
| Schober, Semmering, Wechsel | 63% | 68% | 70% | 73% | +10% |
| Total | 68% | 68% | 67% | 72% | +4% |

Table 1: Modal Split development

Freight flows

Road

Schoberpass

Semmering

Wechsel



Rail

Schoberpass

Semmering



Fact Sheet – Baselinestudy

Further railtransport related descriptions

| Stakeholder | | |
|-------------|---------------------------------------|--|
| | ÖBB-Infrastruktur AG | Company that builds and manages the main railway infrastructure |
| | StLB, GKB | Companies that build and manage regional railway infrastructures |
| | Railway undertakings RCA AG, LTE, StB | Operators |
| | RRT CCG Terminal | Terminal operator |
| | Chamber of commerce (WKO Steiermark) | represents the interests of Austrian companies |
| | Industriellenvereinigung Steiermark | representation of industry's interests |
| | Freight Forwarders | Operators |

| Stakeholder Mapping | | | |
|---------------------|------|--|--|
| | | INTEREST | |
| | | Low | High |
| INFLUENCE | Low | Marginal Stakeholders: Importance = low | Operative Stakeholders: Importance = medium/high Interest groups |
| | High | Relevant Stakeholders: Importance = medium/high | Key Stakeholders: Importance = high Railway Infrastructure Railway Undertakings Freight Forwarders |

Fact Sheet – Baselinestudy

SWOT

strength

- All main transport axes are part of the TEN-T Networks. The southern railway corridor with Koralm railway and Semmering base tunnel as well as the railway line Graz – Spielfeld – Maribor are part of the Baltic-Adriatic Corridor and thus part of the TEN-T core network.
- The main Styrian rail network is electrified, and double-tracked, suitable for freight transports and in line with the requirements of the TEN-T.
- The Styrian railway network serves as an important link between Austria and South Eastern Europe. The Pyhrn/Schober axis – in combination with the Tauern axis – is intended to close the gap in the TEN-T core network connecting Central and South-Eastern Europe as an essential alpine crossing.
- Three publicly accessible freight terminals in Styria – all are suitable for bimodal rail-road transshipment. The Cargo Center Graz (CCG) terminal is the most important logistic node for national and international freight transport and part of the TEN-T core network.

opportunities

- In the course of the next TEN-T revision in 2023, the federal states of Styria, Carinthia, Upper Austria and Salzburg are aiming to include the Pyhrn-Schober axis and the Tauern axis into the TEN-T core network.
- According to the Austrian government's programme 2020 – 2024 and the Styrian government's programme (2019) freight transport is to be carried out in an energy-efficient, environmentally and climate-friendly manner. This should increase the competitive opportunities for rail transport in the future.
- Availability of European, national and regional funds for the strengthening of railway infrastructure.
- Increase of the freight transport volumes in the next years.

weaknesses

- Styria misses a high capacity rail connection from the economic centres in central and the Northwest of Europe to Southeast Europe particularly to the Harbours of Koper and Rijeka as well as to the eastern Adriatic and Western Balkan region. This is due to the single-tracked bottleneck between Selzthal and Linz and further North as well as to the steep southern ramp to the Bosruck tunnel. This bottleneck hampers also the domestic connectivity of the industrial sites of Styria and Upper Austria. Another bottleneck along the Pyhrn-Schober-Corridor is the mainly single track section between Werndorf (south of Graz) and Spielfeld (border to SI).
- The single track regional railway lines are not very suitable for economically successful freight transport.
- With the commissioning of the Koralm railway (2025) the section Bruck and der Mur - Graz will be at the limit of capacity, as several transport corridors (Baltic-Adriatic, Pyhrn-Schober and the regional transport between Leoben and Kapfenberg) pass along this track.
- Because of missing loading stations and companies' feeder lines away from the terminals the accessibility for rail freight transport is very poor. Single wagonload transport is not supported by the railway undertakings.

threats

- Strong competition from road transport.
- The political will for true cost and restrictions in road transport to reach equal conditions in the freight transport market is undermined by the lorry lobby.
- Lack of money for investments in railway infrastructure, further closing of railway lines, private feeder lines or loading points
- The development of the railway network cannot keep up with the development of freight transport.