

IZRAKSTS / EXTRACT

**RB Rail AS
atklāta konkursa
“Kravu pārvadājumu pieprasījuma prognozes atjaunošana”,
identifikācijas numurs: RBR 2026/7**

**An open competition of RB Rail AS
“Freight Traffic Demand Forecast Update”,
identification number: RBR 2026/7**

APSPRIEDES ZIŅOJUMS / CONSULTATION REPORT
Rīgā / In Riga

2026. gada 12. augustā

On 12 August 2026

Pasūtītājs: RB Rail AS, reģistrācijas numurs: 40103845025, juridiskā adrese: Satekles iela 2B, Rīga, LV-1050, Latvija.

Contracting authority: RB Rail AS, registration number: 40103845025, legal address: Satekles iela 2B, Riga, LV-1050, Latvia.

Iepirkuma procedūra un identifikācijas numurs: atklāts konkurss “Kravu pārvadājumu pieprasījuma prognozes atjaunošana”, identifikācijas numurs: RBR 2026/7 (turpmāk – iepirkums).

Procurement procedure and identification number: an open competition “Freight Traffic Demand Forecast Update”, identification number: RBR 2026/7 (hereinafter – Procurement).

Līguma priekšmets: Kravu pārvadājumu pieprasījuma prognozes atjaunošana.

Subject-matter of the contract: Freight Traffic Demand Forecast Update.

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Apspriedes dalībnieki:
- [KONFIDENCIĀLI].

Participants in the consultation:
- [CONFIDENTIAL].

Apspriedes dalībnieku jautājumi, komentāri, pasūtītāja galvenie secinājumi un vērtējums par iepirkuma kvalifikācijas un tehniskās specifikācijas prasību projektu apkopoti apspriedes ziņojuma pielikumā (tikai angļu valodā).

The questions, comments of the participants of the consultation, the main conclusions and evaluation of the Contracting authority on the draft requirements of Procurement qualification and technical specification are summarized in the annex of the Consultation Report (only in English).

Iepirkuma komisijas priekšsēdētāja/ sekretāre
Procurement commission chairperson/ secretary

[PARAKSTS / SIGNATURE] V. Ezergaile

ANNEX
of Consultation Report dated 12 August 2026

The questions, comments of the participants of the consultation, the main conclusions and evaluation of the Contracting authority on the draft requirements of Procurement qualification and technical specification

No	The comment of the Economic operator	Procurement commission's assessment in respect of the comments
Qualification requirement		
1.	N/A	N/A
Technical specification		
1.	As mentioned in section 4 of the Technical Specifications, additional scenarios shall be included as optional work packages. Only "Do-nothing" and "Rail Baltica Base Case" are required as mandatory. In addition to these, [...] recommends the inclusion of at least two additional scenarios to reflect the exceptionally high level of uncertainty surrounding future freight markets in the Baltic region until 2056. Since the original model base year (2019), freight flows have been significantly affected by geopolitical developments, shifts in trade patterns, supply chain reconfiguration, decarbonisation policies and evolving security requirements. We therefore propose the following four scenario concepts, from which at least one upside and one downside scenario should be selected and implemented as mandatory part of the core scope: 1. Baltic Resilience & Defence Logistics (Upside Scenario) Assumes a continued strengthening of European and NATO-related logistics activities in the Baltic region, increased demand for resilient supply chains, and higher utilisation of north-south rail freight corridors. The scenario tests Rail Baltica's role as a strategic logistics backbone for intermodal freight transport and critical supply chains 2. European Reconfiguration & Ukraine Reconstruction (Upside Scenario) Assumes a cessation of the war in Ukraine, large-scale reconstruction programmes, deeper economic integration between Ukraine and the EU, and a reconfiguration of European supply chains. The scenario analyses	The Procurement commission acknowledges the potential value of additional upside and downside scenarios and sensitivity analyses in supporting the assessment of freight demand forecasts. The current scope of the Services is considered appropriate for achieving the objectives of the assignment; however, such analyses may be undertaken, where required, under the optional scope as on-demand services.

	the extent to which Rail Baltica could benefit from additional container, project cargo and intermodal flows linking Northern Europe, the Baltic States, Poland and Ukraine. 3. Geopolitical Fragmentation & Low Growth (Downside Scenario) Assumes prolonged economic weakness, reduced international trade growth, continued geopolitical fragmentation and persistently lower freight volumes compared with pre-2022 expectations. The scenario serves as a stress test for Rail Baltica by assessing freight demand under adverse market conditions and limited logistics sector expansion. 4. Maritime Dominance & Weak Rail Shift (Downside Scenario) Assumes that maritime transport retains its strong competitive position in the Baltic Sea region, limiting the expected modal shift towards rail. Continued efficiency improvements in ports and shipping services, lower-than-expected transport cost advantages for rail, and slower growth of intermodal logistics result in a larger share of freight remaining on maritime and road-based transport corridors. The scenario assesses Rail Baltica's freight performance under conditions where overall freight demand may continue to grow, but rail captures a smaller share of the market than anticipated. It provides an important stress test of the project's ability to attract long-distance freight flows in a highly competitive transport environment. Together, these scenarios provide a robust framework for assessing the uncertainty range of future freight demand and testing the resilience of Rail Baltica's freight business case under substantially different economic, geopolitical and policy environments.	
2.	Additionally, we strongly recommend including mandatory sensitivity tests to assess the robustness of model outcomes. While the proposed scenarios explore alternative macroeconomic, geopolitical and policy futures, a number of important factors influencing Rail Baltica's success are not sufficiently large to justify dedicated scenarios but may nevertheless have a material impact on realised freight volumes. [...] therefore recommends complementing the scenario framework with a series of targeted sensitivity analyses focusing on key market and operational bottlenecks. These sensitivities would allow Rail Baltica to assess how variations in specific enabling factors, such as rolling stock availability, terminal performance or market uptake, affect the project's ability to convert potential demand into actual rail freight volumes. This approach provides	

additional insight into implementation risks and strengthens the overall robustness of the freight demand assessment. We therefore suggest the following risk factors as dedicated sensitivity tests: Rolling Stock Availability Sensitivity Assessment of the impact of constrained locomotive and wagon availability on the achievable rail freight volumes in the Rail Baltica corridor. The analysis would examine the extent to which market growth may be limited by fleet availability, delivery lead times for new rolling stock, interoperability requirements and the availability of intermodal freight equipment. This sensitivity would provide additional insight into the difference between theoretical demand and realistically deliverable rail freight services. A meaningful assessment of this sensitivity requires access to a comprehensive and continuously maintained rolling stock database, combined with detailed market intelligence on fleet operators, leasing companies, manufacturers, order pipelines and fleet replacement programmes. This enables the distinction between theoretical fleet capacity and the volumes that can realistically be supported by the European rolling stock market over the forecast horizon. Cross-Border Operational Performance Sensitivity Assessment of the impact of cross-border operational performance on Rail Baltica's freight attractiveness and market uptake. The analysis would test the effects of increased border-crossing delays, reduced timetable reliability, longer transit times and operational inefficiencies at international interfaces. Particular attention would be given to the role of cross-border coordination, traffic management and interoperability in maintaining competitive rail freight services. The sensitivity would provide insight into the extent to which Rail Baltica's freight volumes depend on the achievement of seamless international operations across the corridor. Intermodal Terminal Uptake and Ramp-Up Sensitivity Rail Baltica's long-term freight potential relies on the successful development of intermodal logistics hubs and the timely integration of these facilities into European freight networks. However, the market uptake of new terminals is rarely immediate and may depend on operator participation, logistics investments, service availability and customer acceptance. This sensitivity would test the impact of different terminal adoption and utilisation pathways, ranging from rapid market uptake to more gradual development. The objective is to assess how the speed of terminal market	
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	penetration and operational maturity influences Rail Baltica's ability to convert potential freight demand into realised intermodal traffic volumes.	
3.	2.2. The draft ToR state that <i>"The Service shall migrate the calibration base year of the freight demand sub-model from 2019 (the base year of the existing TDM) to 2024."</i> However, the demand sub-models of passengers and freight movements do not operate in full isolation. The demand models typically use utility skim matrices extracted from loaded networks which include both freight and passenger traffic. In such non-integral setup envisaged by the current task, it should be clear that the freight model calibration for 2024 will be performed under significant set of assumptions on the passengers traffic.	The Procurement commission recognizes the interaction between freight and passenger demand modelling components and agrees that certain assumptions regarding passenger traffic conditions will be required when calibrating the freight demand sub-model for 2024. However, the Procurement commission considers that the current scope of the Services remains appropriate, as the passenger demand sub-model provides a sufficient basis for the development and calibration of the freight demand sub-model envisaged under the Services.
4.	2.4. Given that the draft ToR state that <i>"All main types of freight shall continue to be modelled in accordance with the commodity classification established in the original TDM"</i> it is important to underline that the TDM currently includes liquid bulk, dry bulk, semi-bulk (general cargo), unitised and trade cars. The TDM does not include separated matrices for containers and trailers (although the split between containers and trailers is estimated on assignment results) and does not include anything like "less-than-wagon load", "e-commerce and postal", "refrigerated cargo", "break bulk" and "project cargo". For most of these segmentations there is no data. In particular, project cargo is by definition occasional, past yearly volumes are unknown and future volumes cannot be and associated to origin-destination pairs. Therefore, is just not possible to include project cargo in the model. Including the other freight types mentioned would face the lack of data and would be contradictory with the stated objective of continuing with the commodity classification established in the original TDM.	The Procurement commission considers this comment/suggestion reasonable. The Technical specification will be amended accordingly.
5.	2.5. Considering that <i>"The Contractor shall not alter the fundamental structure or architecture of the existing model"</i> (from the first paragraph of 2.3. Methodological Approach of the draft ToR), it is important to underline that the commodity types listed in the third bullet point should include only containers, trailers, general cargo and bulk, as postal, break bulk, project	Consistent with the assessment of the previous comment/suggestion, the Technical specification will be amended accordingly.

	cargo and other freight types are not part of the current version of the TDM (see comment above).	
6.	2.5. Considering the seventh bullet from the list of expected model output (section 2.5) <i>“total transport costs, including a split by cost category...”</i> further clarification of the cost categories would be needed. If too detailed categorisation of costs is required as output, this directly enters into the supply modelling domain (and changing its structure) which is (according to our understanding) out of the scope of the current assignment.	The Procurement commission agrees that the required level of transport cost categorisation should remain consistent with the structure of the existing model and should not require modifications to the supply-side cost structure. Accordingly, the Technical specification has been amended to clarify that cost categories shall be reported only to the extent represented in the existing model and that no extension of the supply-side cost structure is required under the services.
7.	2.5. While geographically referenced outputs (Shapefiles/GeoJSON) are standard and could be fully provided, generating RailML outputs from TDM is technically mismatched and impractical. The RailML standard is built for highly detailed railway engineering, micro-track topology, and absolute, clock-face timetables. Because this large-scale strategic model appropriately utilizes abstract logical links and headway-based service frequencies rather than real timetables, any RailML export would lack the necessary operational detail, consist of empty data fields, and ultimately be functionally useless for downstream systems.	The Procurement commission considers these comments/suggestions reasonable. The Technical specification will be amended accordingly.
8.	2.6. It should be clarified what is/will be the level of modelling expertise and usage of PTV Visum software of the RBR staff members that shall be trained to work with the model.	
9.	2.9. Our consideration is that the overall proposed timing looks quite ambitious and in particular we deem that more time would be needed for the submission of Deliverable 2 (now it is 15 weeks) and for Deliverable 3 (now it is 28 weeks). The overall timeframe should be extended to at least 52 weeks; even keeping the overall timeframe of 39 weeks, we would suggest increasing the time allowed for Deliverables 2 (Data collection and validation) and 3 (model calibration); this would give more time for data validation and model recalibration and would reduce the time available for the model runs and delivery of Deliverable 4.	Having considered the suggestion and its implications, the Procurement commission has decided to amend the Technical specification by extending the deadlines for the submission of Deliverables and by introducing a more detailed acceptance procedure for Deliverables.

10.	3. The first bullet of WP1: Inception Report in Section 3 mandates a data update strategy to extend the freight sub-model's inputs across a 2020–2025 time horizon, anchoring the recalibration on a fixed 2024 base year through a strict, year-by-year assessment of data completeness and reliability. Given that the calibration base year is already fixed at 2024, the precise methodological justification for requiring a resource-intensive, multi-year analysis from 2020 to 2025 should be further clarified.	The Procurement commission agrees that the original wording could be interpreted as requiring a broad and resource-intensive multi-year assessment extending beyond what is necessary for the recalibration of the freight demand sub-model. Accordingly, the Technical specification has been amended.
The main conclusions of the Procurement commission in respect of the questions and comments of the Economic operators received and the possible competition in the Procurement procedure: Based on the feedback received during the market consultation, the Procurement commission concluded that the proposed scope of the Services is clear, feasible and aligned with market capabilities. Several comments were considered valid and have resulted in targeted amendments and clarifications to the Technical Specification; however, the overall scope and objectives of the Services remain unchanged. The participation of experienced Economic operators demonstrates market interest and supports the expectation of effective competition in the Procurement procedure. The Procurement commission considers that the amendments introduced do not materially alter the nature, scope or complexity of the Services, nor the profile of Economic operators capable of performing the contract. Therefore, no additional market consultation is considered necessary.		