



INTERNATIONAL UNION
FOR ROAD-RAIL
COMBINED TRANSPORT

Market Intelligence Initiative - Workshop

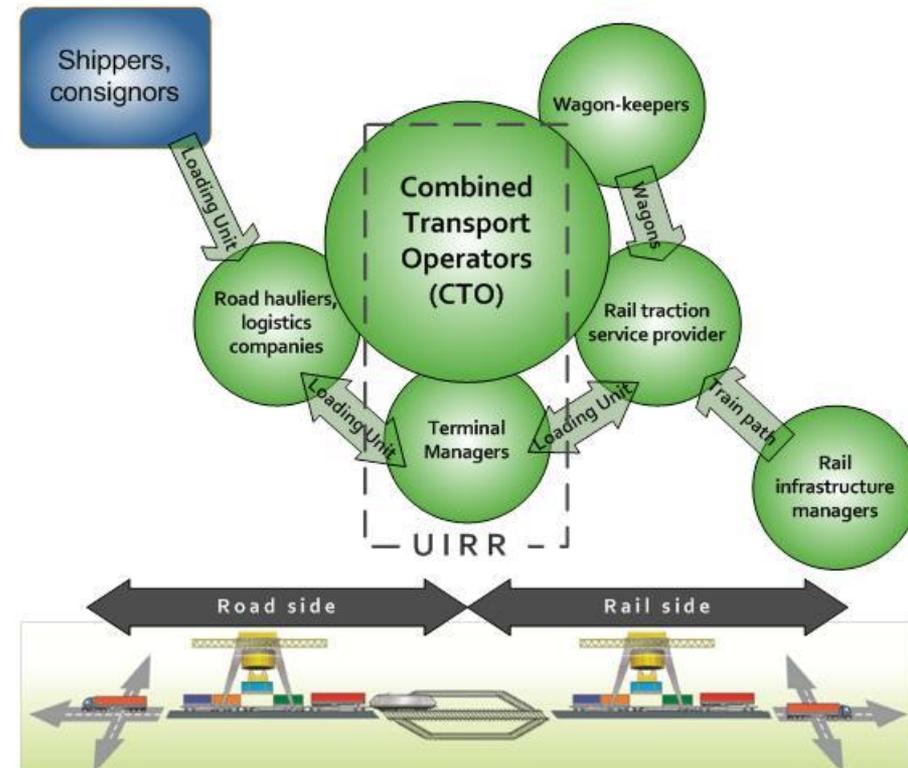
STATUS AND FUTURE CHALLENGES OF COMBINED TRANSPORT



Ralf-Charley SCHULTZE
Director General



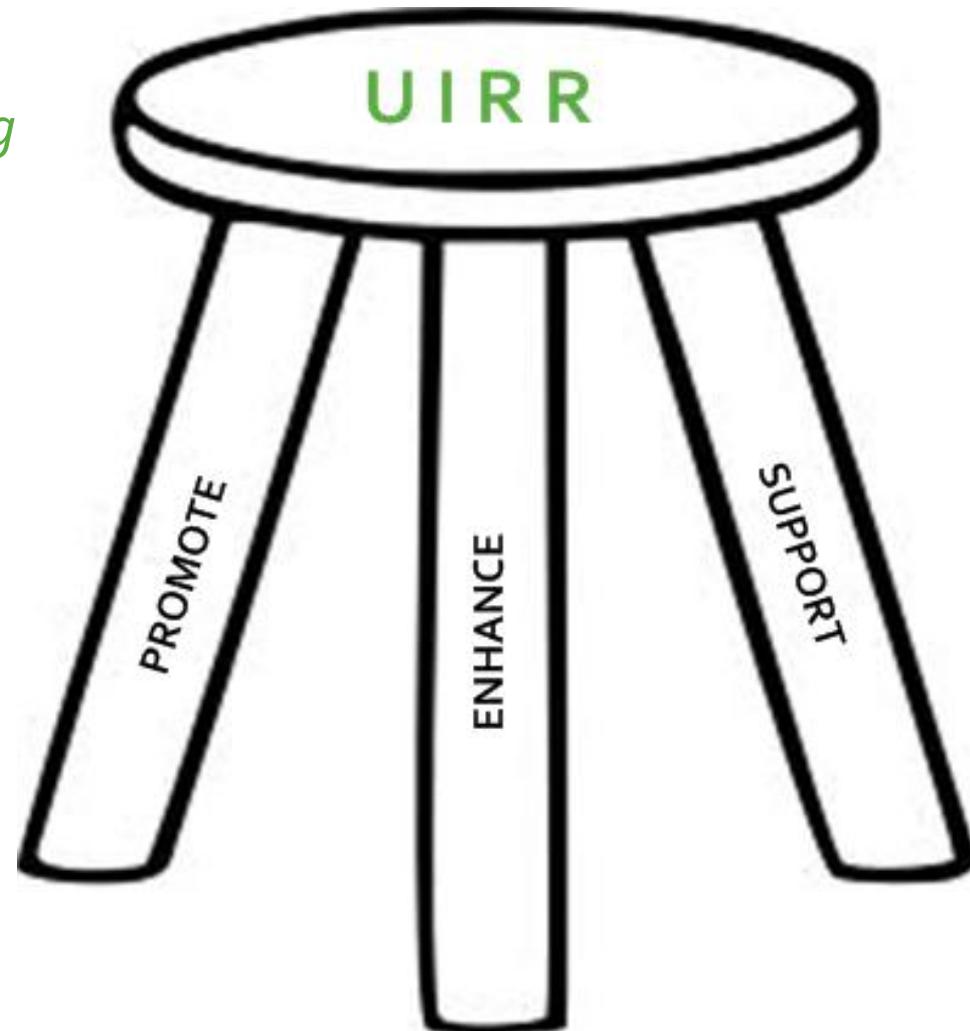
- **Members:** Combined Transport Operators and Terminal Managers, who enable the efficient insertion of rail into transport-chains
- **Logistics companies, road hauliers:** customers as well as shareholders of UIRR Members
- **Performance:** UIRR Members handled about 50% of European Combined Transport in 2014
- **Interest:** fair regulatory conditions in transport to enable *competition on the basis of technical merit and competence/management excellence*
- **UIRR:** founded in 1970
- seat in Brussels since 1988





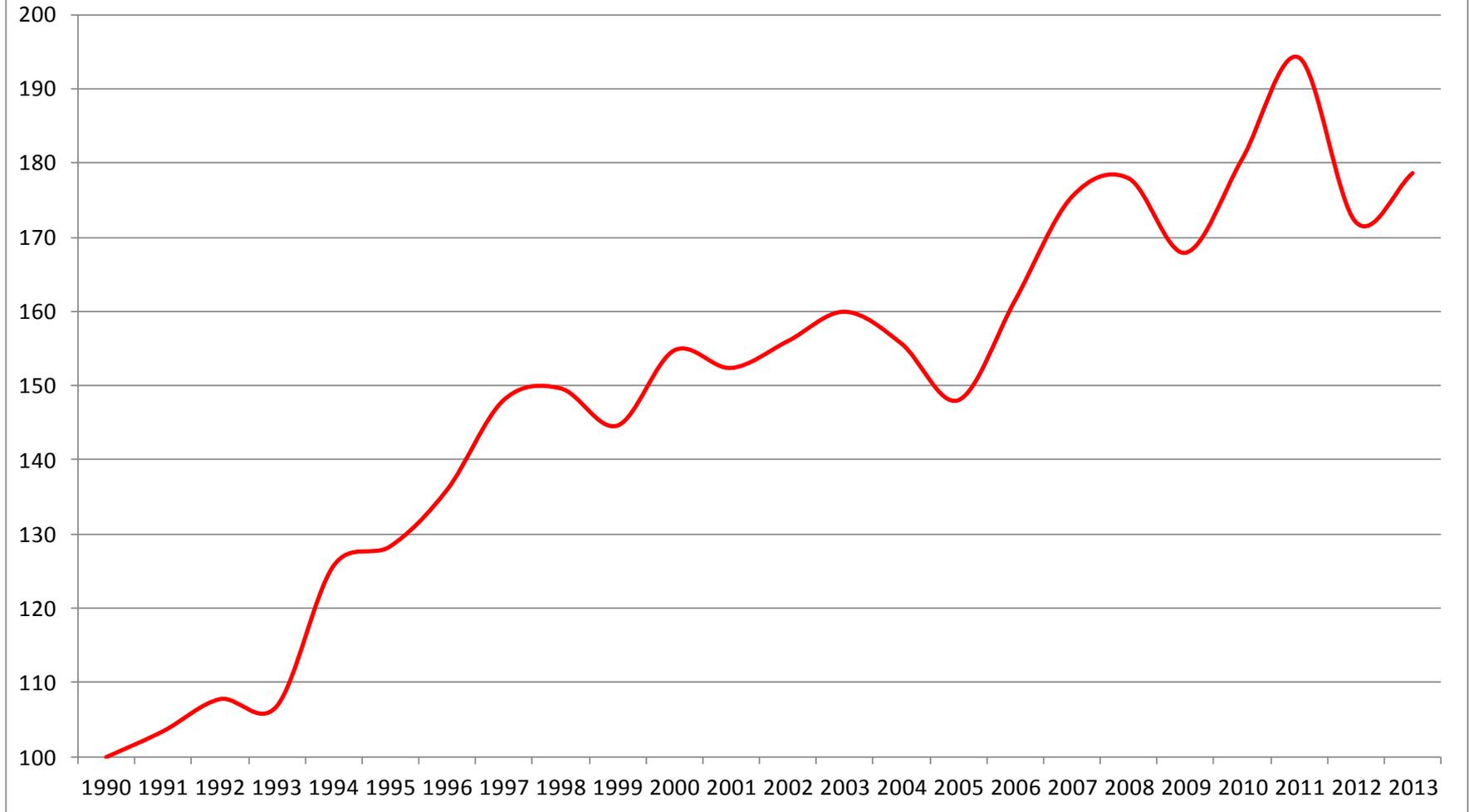
*UIRR is an **industry association** which*

- **PROMOTES** the public understanding and appreciation of Road-Rail Combined Transport,*
- **ENHANCES** its development and the proliferation of industry best practice,*
- **SUPPORTS** the daily operation of European Combined Transport with a series of services*





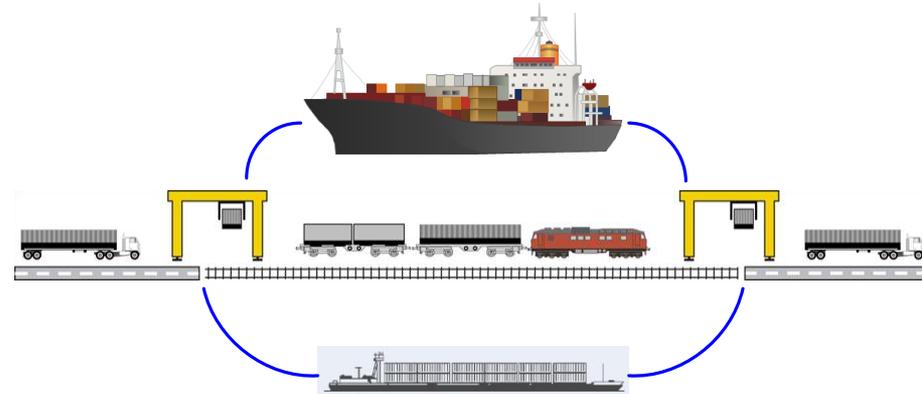
Growth of CT Performance (1990 = 100)



The Beauty... (?)



and The Beast



Intermodal/Combined Transport in Europe





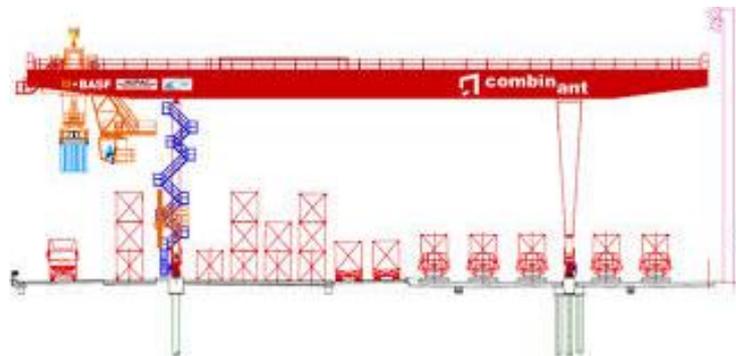
UNIMODAL FREIGHT TRANSPORT

Misses out on advantages:

- energy efficiency,
- labour productivity,
- superior safety and security,
- climate resilience, and
- outstanding environmental performance.

INTERMODAL / COMBINED TRANSPORT

Efficiently inserts economically and ecologically sustainable modes of transport into long(er) distance transport-chains to maximise the benefits for every stakeholder.



Primary energy need and CO₂ performance of modes

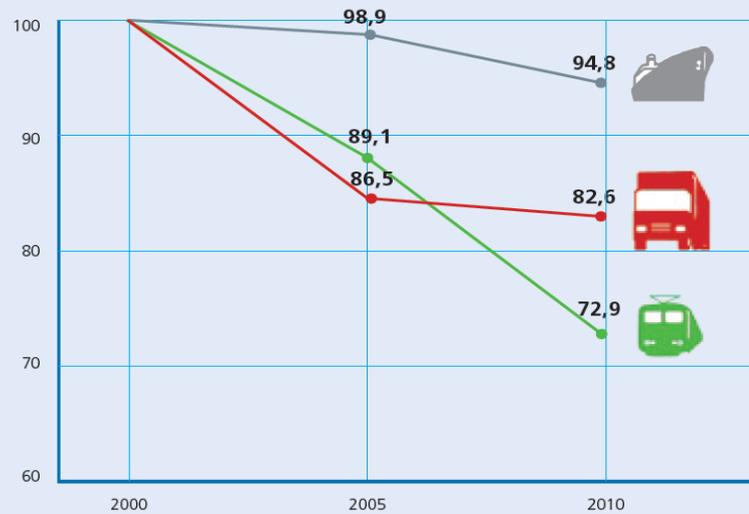


Spezifischer Energieverbrauch in kWh/tkm; Bahn, Lkw, Schiff; Bezugsjahr 2010



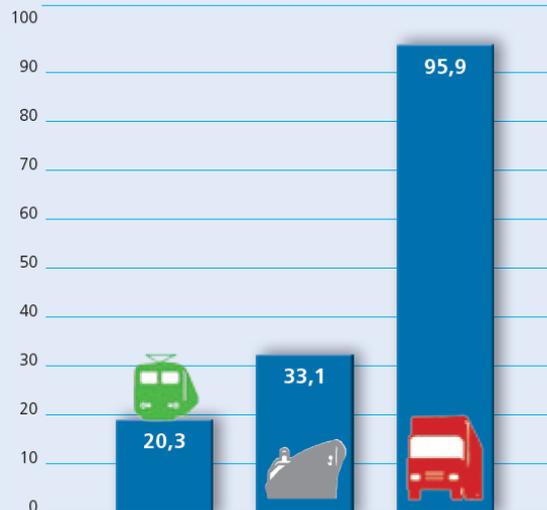
ifeu 2011, Datenbank Umwelt & Verkehr

Spezifischer Energieverbrauch seit 2000; in Prozent; Bahn, Lkw, Schiff



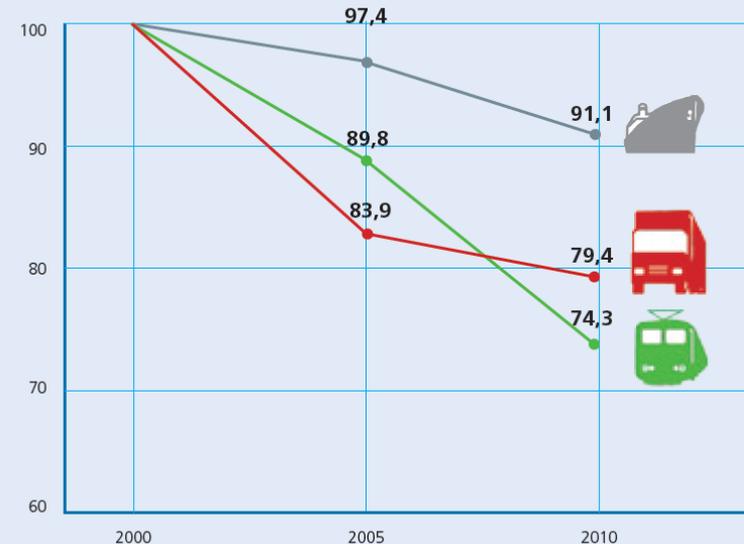
ifeu 2011, Datenbank Umwelt & Verkehr

Spezifische CO₂-Emissionen in g/tkm; Bahn, Lkw, Schiff; Bezugsjahr 2010



ifeu 2011, Datenbank Umwelt & Verkehr

Spezifische CO₂-Emissionen seit 2000; in Prozent; Bahn, Lkw, Schiff



ifeu 2011, Datenbank Umwelt & Verkehr



Safety category	Road	Rail
Fatalities in 2009 ¹	35 000	34
Accident occurrences: (i) road ¹ and (ii) rail ²	1 200 000	1152
Accident occurrences: (i) HGVs, (ii) freight trains	31 per 100M vkm ²	1,05 per 100M vkm ³
Accident externality cost of (i) HGVs on motorways, and (ii) trains	€68 667 per 100M tkm ⁴	€238 per 100M tkm ⁵

Road haulage is 30-times as accident prone as rail

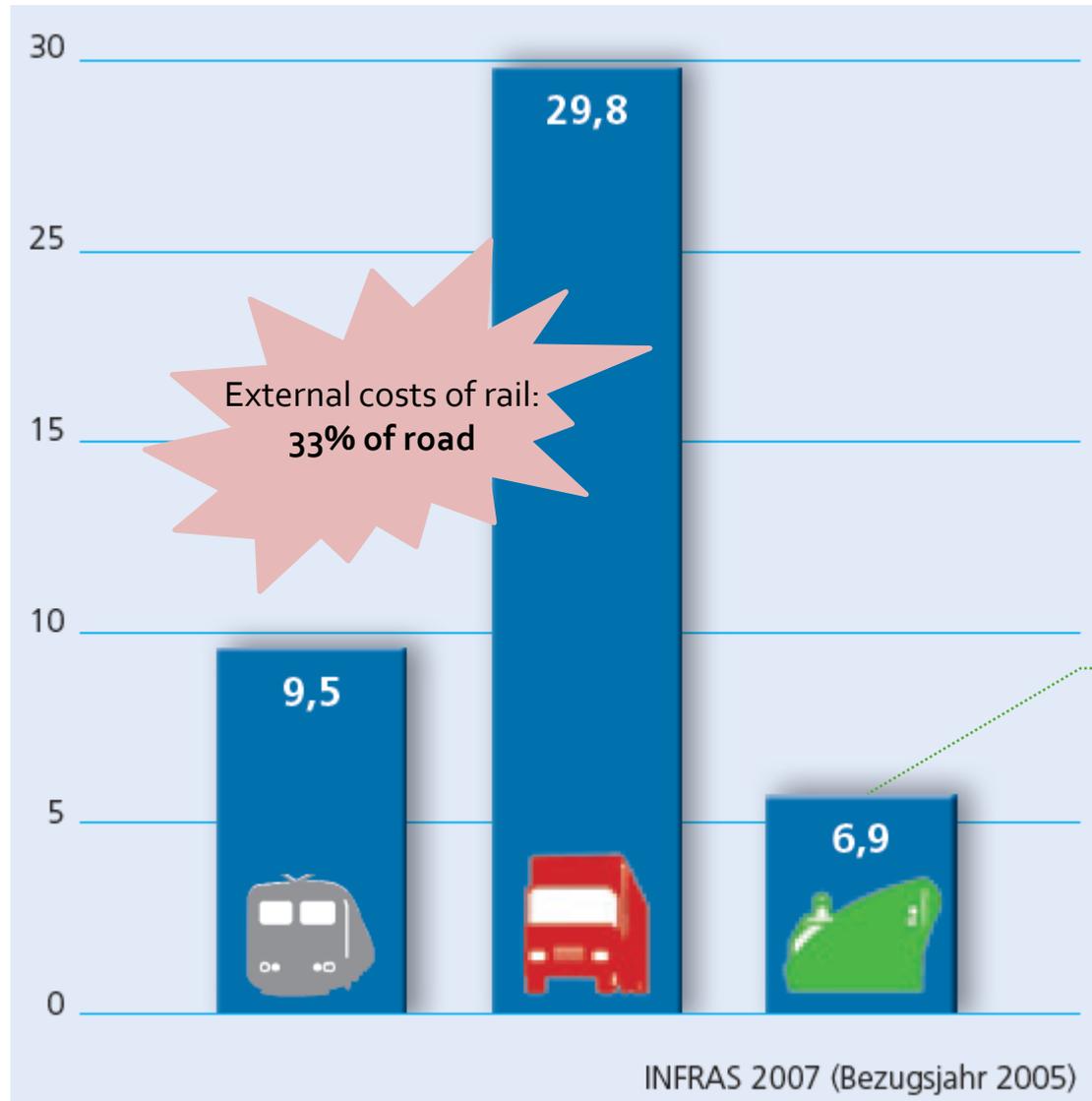
¹ Source: EC EU transport in figures [2011]

² Source: Alan C McKinnon at 2nd IRU/EU Road Transport Conference: "31 per 100M vkm" [2012]

³ Source: ERA 2011 Rail Safety report figure (tkm) converted to (HGV) vkm @ 30t/vehicle rate [2011]

⁴ Source: CE Delft IMPACT Study (internalisation handbook) converted into tkm @ 30t/vehicle rate [2008]

⁵ Source: CE Delft IMPACT Study (internalisation handbook) converted into tkm @ 800t/train rate [2008]





The key to success: the switch to using the "box"



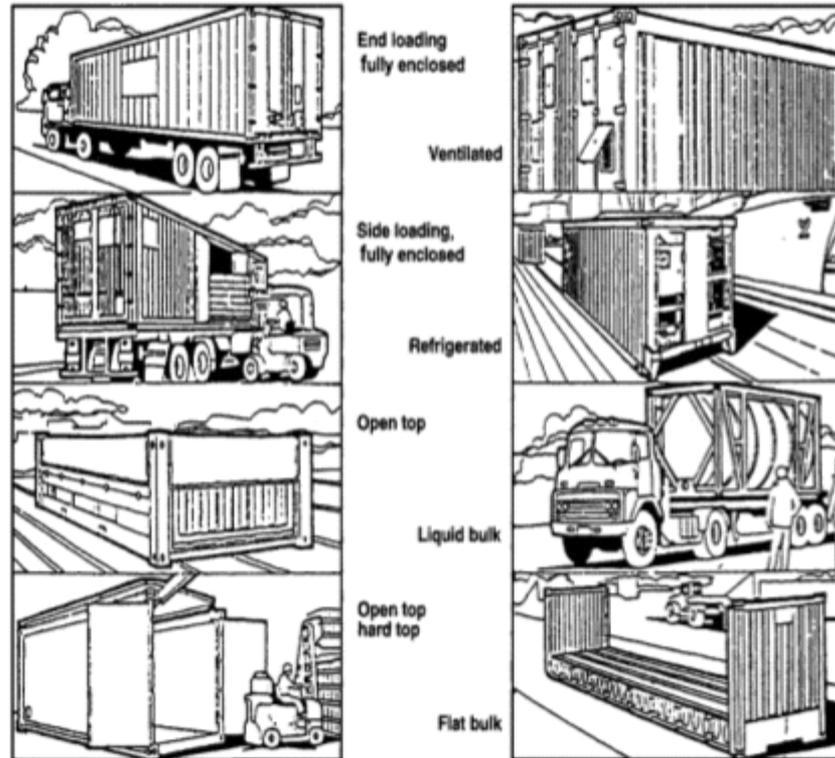
Containerisation: the pre-requisite to unlock the benefits Combined Transport

HIGH VALUE

PERISHABLES

OVERSIZED

LIQUIDS



DANGEROUS GOODS

BULK

PALLETS

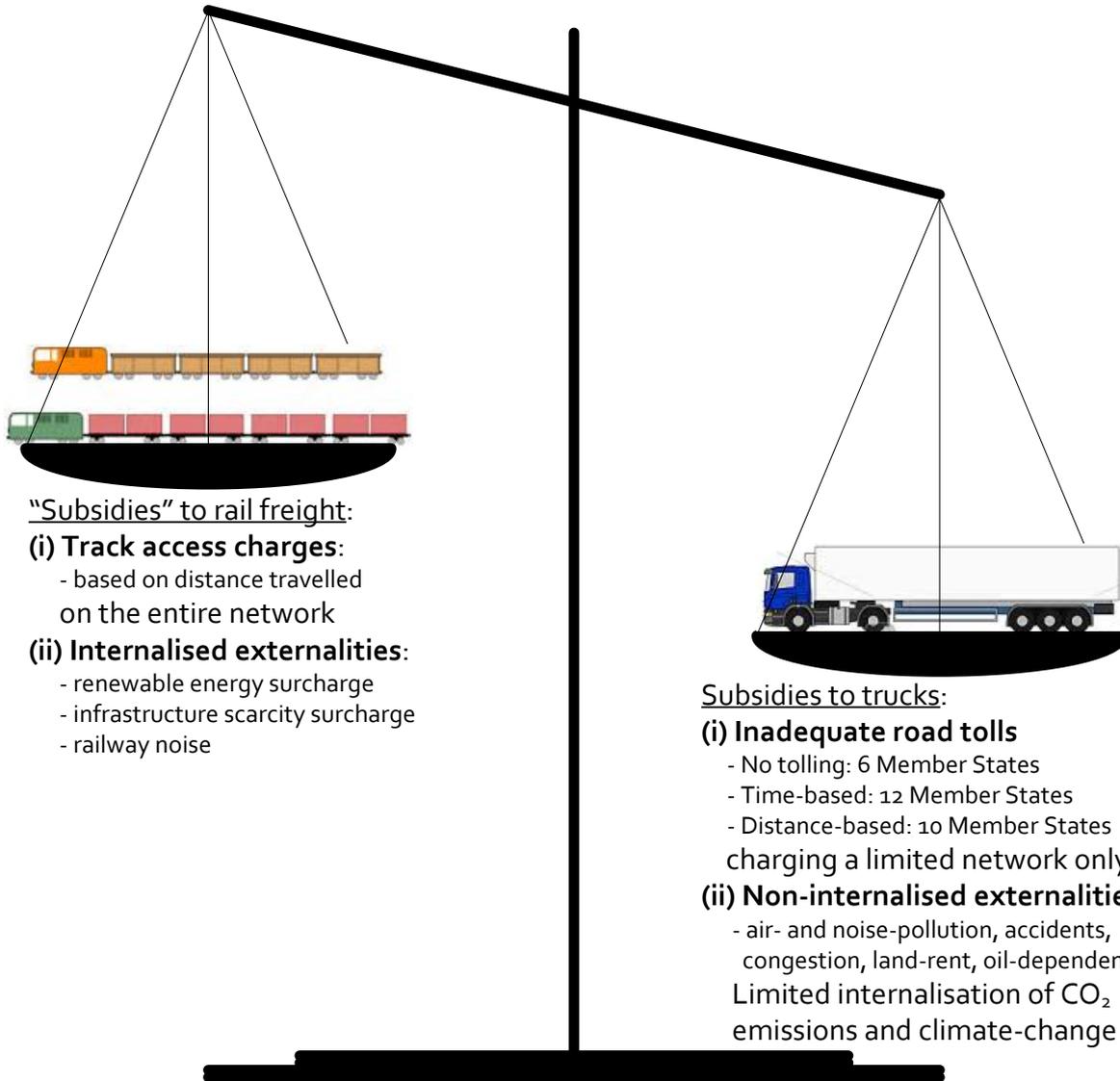
A challenge to logistics professionals

12



	Unimodal solution	Intermodality
Short-haul (positioning/distribution traffic)	trucks	trucks
Terminals	road logistics centres	intermodal terminals
Long-haul	road-only (megatrucks)	rail, SSS, IWW
Containerisation (using intermodal loading units)	not necessary	<i>prerequisite</i>
Consignors, logistics service providers	business as usual	<i>creative, innovative thinking</i>

INTERMODALITY = CREATIVE, INNOVATIVE THINKING IN TRANSPORT



Two principles should be equally upheld:

- user-pays

- polluter-pays

The de-politicisation of transport - no more budget transfers - would be needed to make transport truly market based and competitive in a fair manner.



THE SOLUTION

- **The Fourth Railway Package:** fair intramodal competition, homogeneous infrastructure management, technical harmonisation and reduced administrative burden
- **Rail Freight Corridor Regulation:** seamless cross border travel, coordinated development and maintenance works, capacity planning and traffic management
- **The new TEN-T Guidelines and the Connecting Europe Facility:** interoperable and homogeneous infrastructure, removal of capacity bottlenecks
- **Standardisation:** CEN, ERA, UN ECE, OTIF, UIC, voluntary industry best practice recommendations
- **Implementing Acts and reporting:** Commission guidance and enforcement of implementation concerning the European rules; as well as statistics collection and reporting



The recast of Directive 92/106

■ **Framework legislation**

- definitions and Pan-European rules for technical aspects such as codification, certification, registration, etc.

■ **Temporary benefits**

- to counterbalance the regulatory disadvantage for as long as it continues to prevail (proportionately to the status quo in each Member State)

■ **Optimised infrastructure**

- complementing the large CEF Transport projects with small scale development aid on a Member State level to eliminate infrastructure limitations faced by consignors if wishing to shift to intermodal/combined transport

continued...

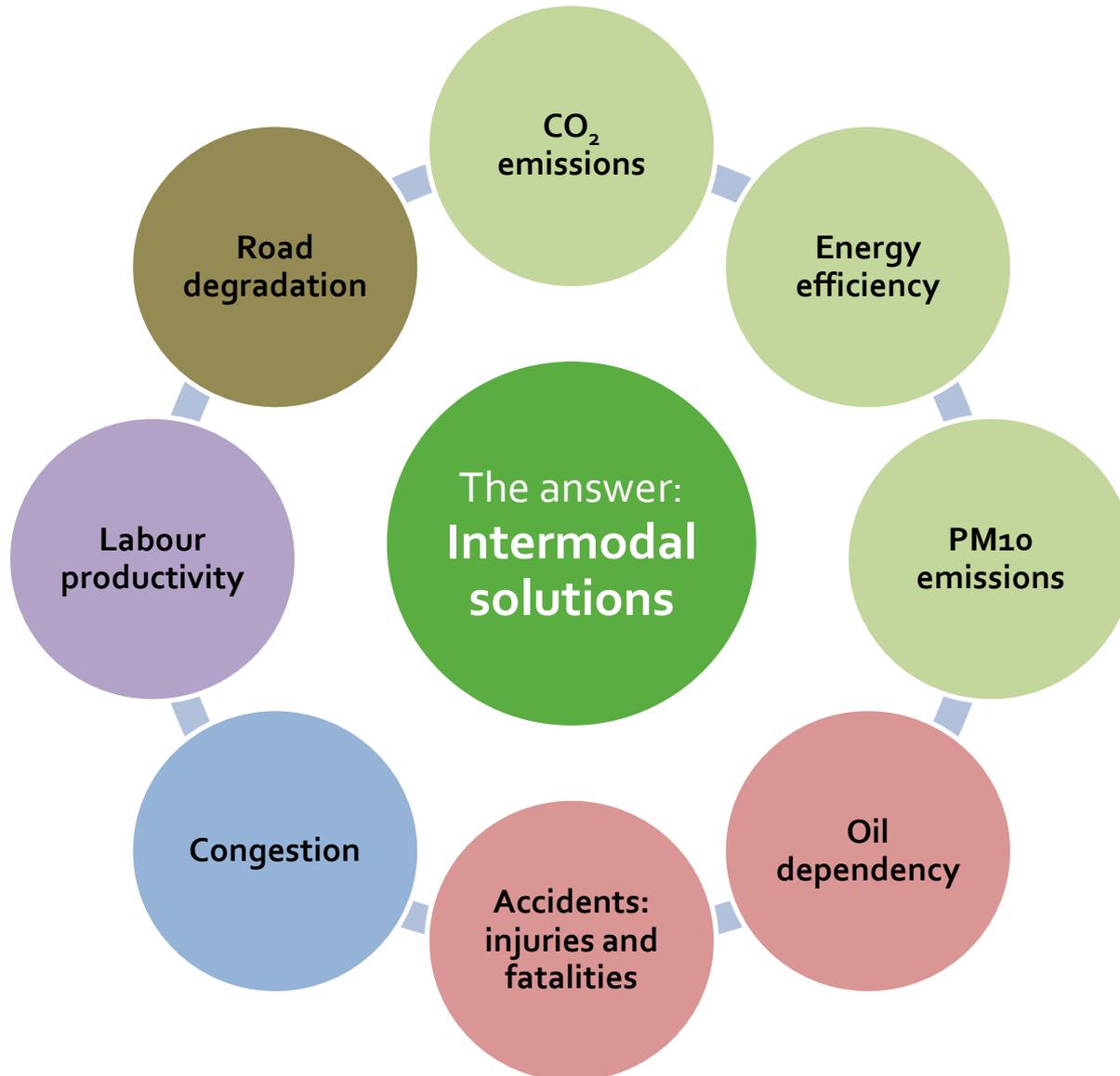


The recast of Directive 92/106

- **Development plans**
 - encouraging the complex horizontal thinking required by intermodal/combined transport based logistics on a Member State level

- **Intermodality test**
 - systematic test of any policy or regulatory proposal as part of the impact assessment to check whether an intermodal/combined transport solution could not deliver the desired outcome more efficiently

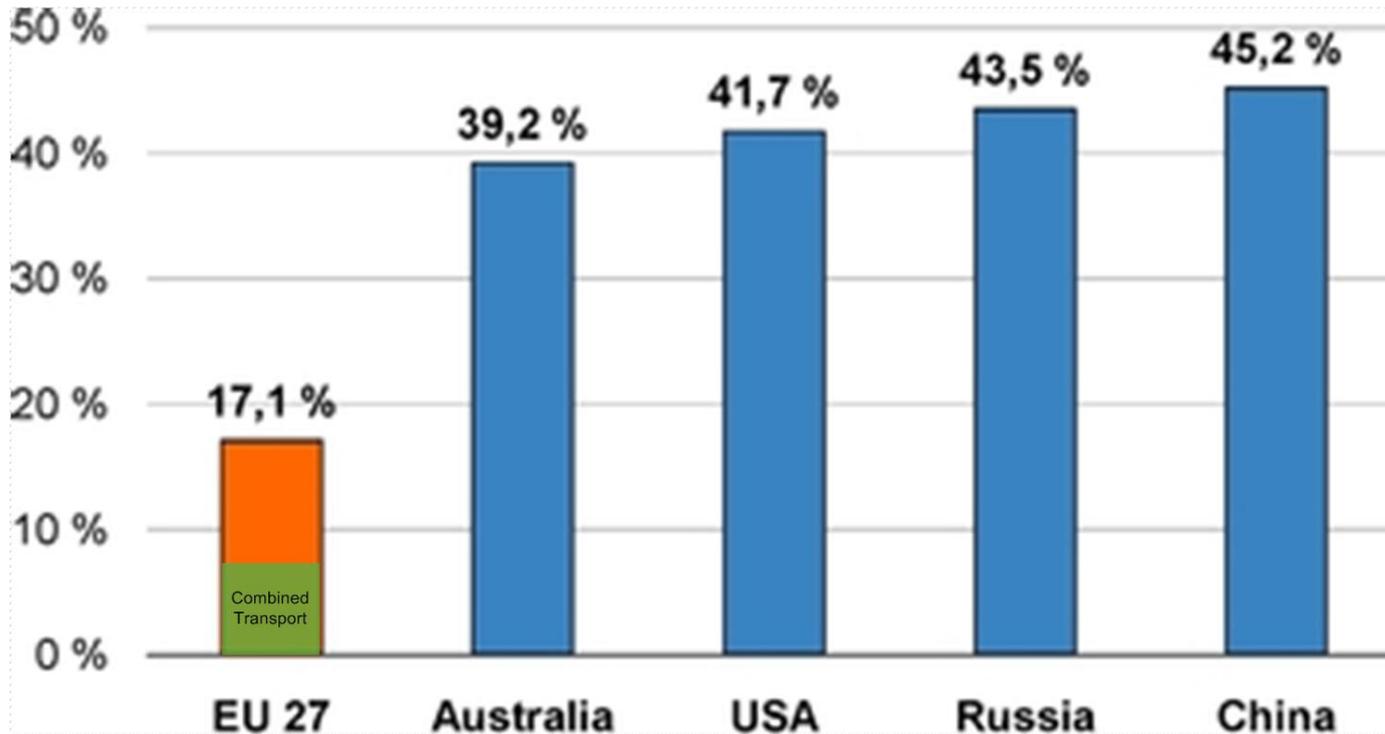
- **Monitoring and reporting**
 - accurate measurement of intermodal/combined transport performance and regular feed-back to the decision-makers



Consequence of the currently ongoing revision of Directive 96/53 on weights and dimensions of commercial road vehicles:

- 15cm extension to the semi-trailers carrying pallet-wide 45-foot containers or swap-bodies*
- has been allowed enabling the use of rectangular 45 footers.*





THE RELATIVELY LOW SHARE OF RAIL FREIGHT IN EUROPE PROMISES A CONSIDERABLE UPSIDE POTENTIAL FOR GROWTH

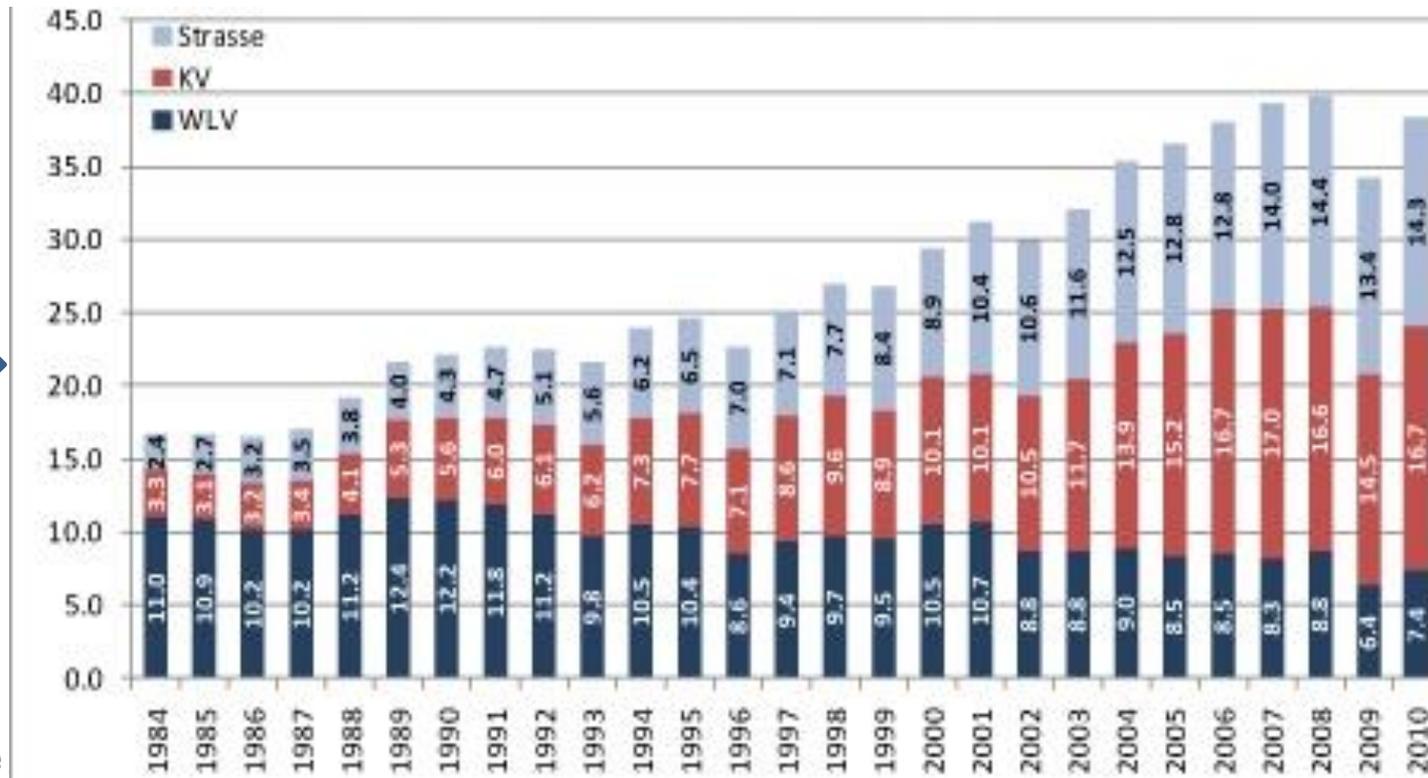
The future: Combined Transport can do the job



...if and where the framework conditions are right

- ✓ Competition and transparency: level playingfield for the different modes
- ✓ Recognition of freight: train path capacity allocation
- ✓ Development of capacities: lines and terminals
- ✓ Quality and accountability

Transalpine traffic through Switzerland 1984 – 2010





INTERNATIONAL UNION
FOR ROAD-RAIL
COMBINED TRANSPORT

THANK YOU

For your attention

