

European Intermodal Logistics Conference

INTERNATIONAL RAILWAY CORRIDORS: NEW PERSPECTIVES



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Chief Policy Advisor

UIRR: the industry association of intermodal transport

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PARTNERS



GOVERNMENTAL BODIES

MoU PEERS



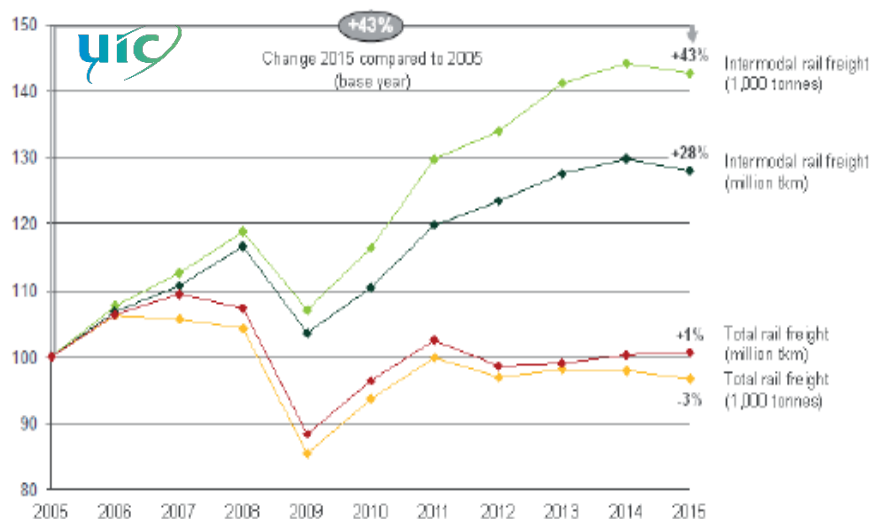
INDUSTRY ASSOCIATION PEERS

MANUFACTURER'S PLATFORM



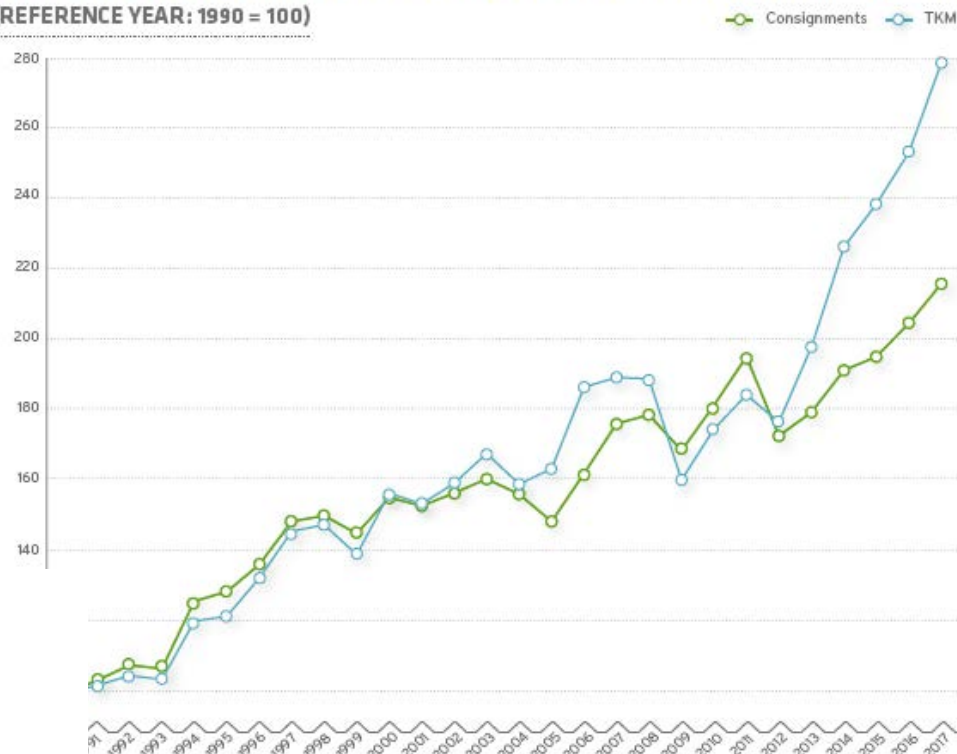
UIRR TERMINALS





UIRR CT Growth Index - Consignments and Tonne-Kilometres

(REFERENCE YEAR: 1990 = 100)



Intermodal is the engine of rail freight development

- ✓ Infrastructure inadequacies limit growth potential – profile gauge, train length and gross weight, port connections
- ✓ Recognition of freight: train path quality, infrastructure capacity allocation and traffic rules affect overall competitiveness

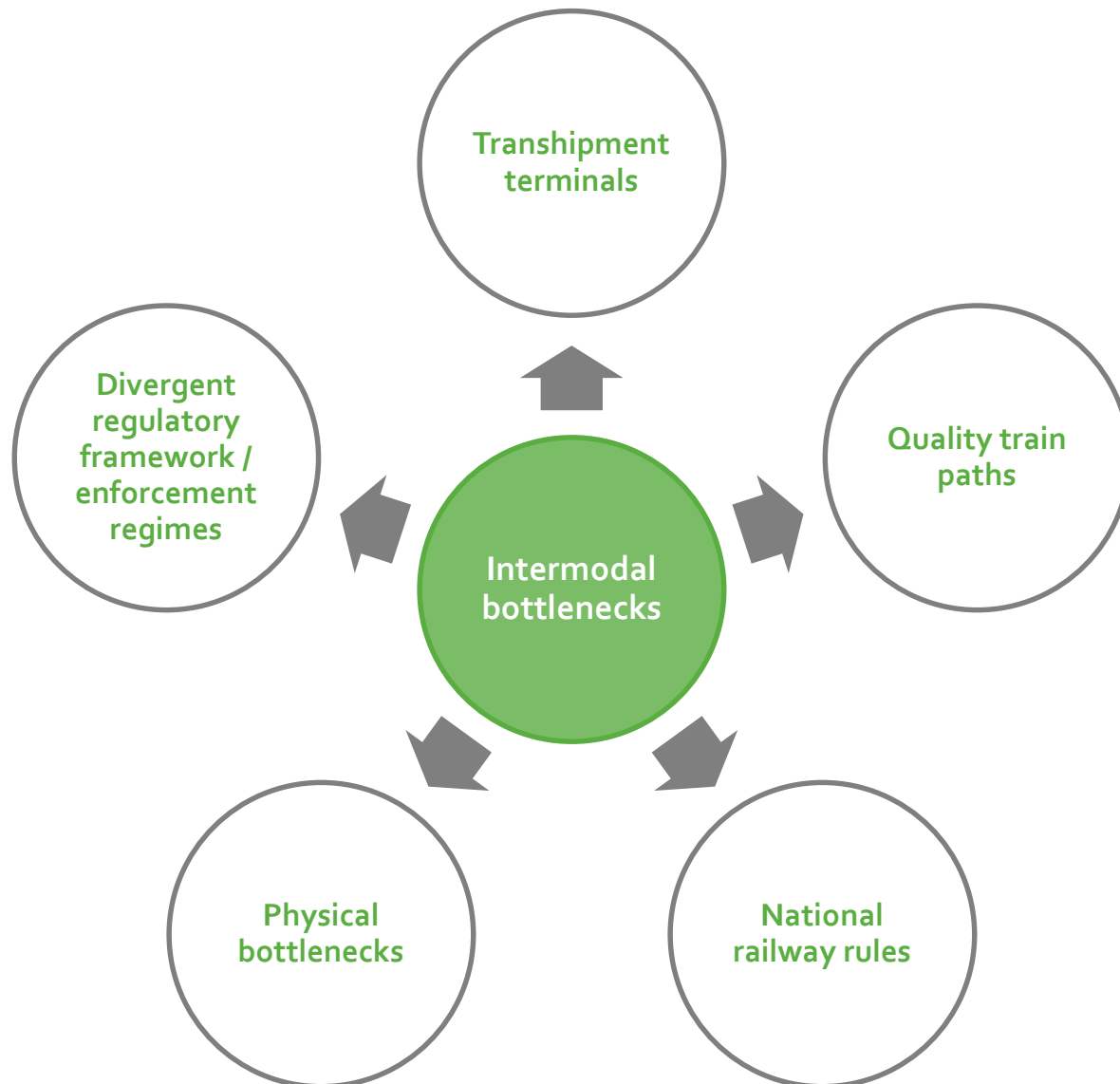
Conventional rail freight vs. Intermodal Road-Rail

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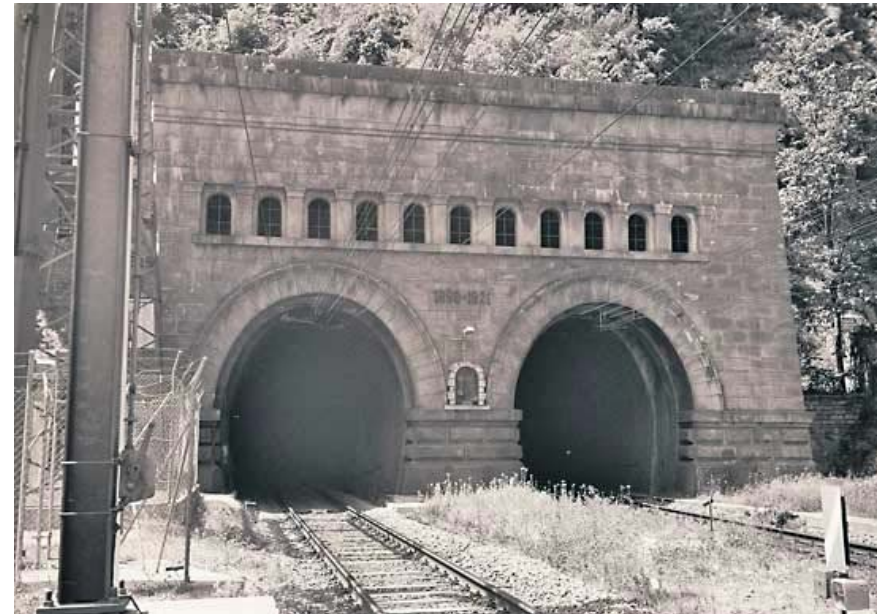


Transport/Storage:
1D vs 2D

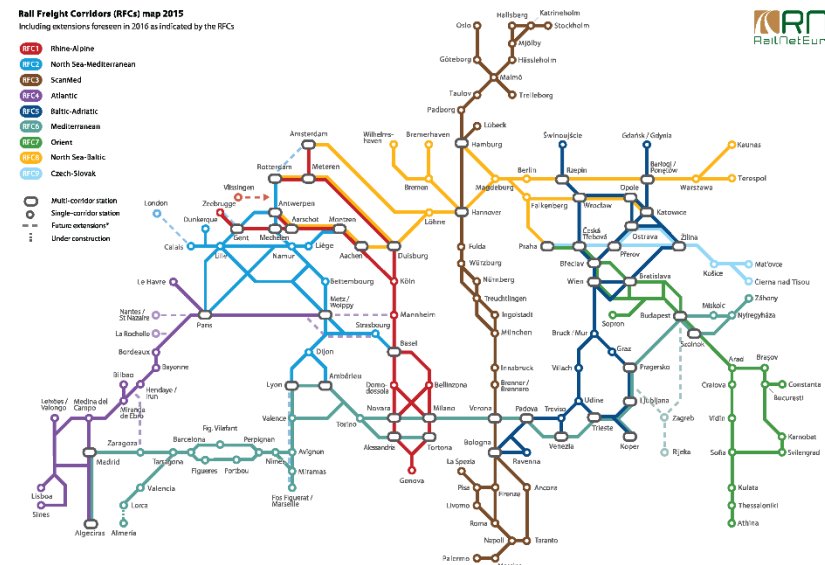




- **Symbolic infrastructure**: uneven progress – some big projects advance faster than others
- **Connecting lines**: uncoordinated upgrades of connecting lines to/from symbolic infrastructure like Gotthard Base Tunnel
- **TEN-T parameters**: inconsistent progress in train length, axle load and profile gauge upgrades and ERTMS implementation
- **Small-scale bottlenecks**: replacement of switches, extension of bypass lines, completion of missing electrification progresses slowly and often lacks funding
- **Coordination of works**: deficiencies both in the coordination of planning and the implementation of works is a shortfall of cooperation foreseen under the Rail Freight Corridors



Rail Freight Corridors (RFCs) map 2015
Including extensions foreseen in 2016 as indicated by the RFCs

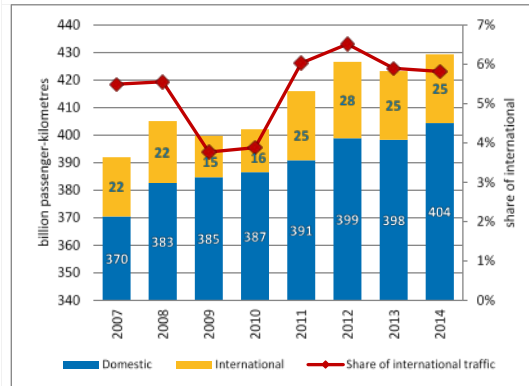


- **Uneven terminal density:**
good subsidy scheme ➤ no CAPEX support
- **Lack of urban terminals:**
close to downtown to directly support city logistics
- **Quality/homogeneity:** upgrade to CNC parameters
- **Operational standards:** Implementing Act on Access to Service Facilities
- **'Not in my back yard' effect:** fear of noise and traffic is hurdle to new projects
- **Lack of coherent intermodal plans and/or commitment to modal-shift:** insufficient input to encourage developers and/or to reduce risks



- **Passenger traffic:** 10% growth (no data of trainkm growth) | punctuality: 80-85% (to 5 minute)

Figure 1 – Evolution of rail passenger traffic volumes



Source: RMMS



Figure 1 – Punctuality of regional and local passenger services, percentage of services on time

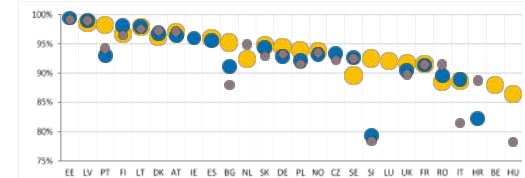
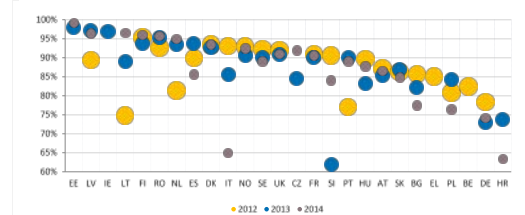
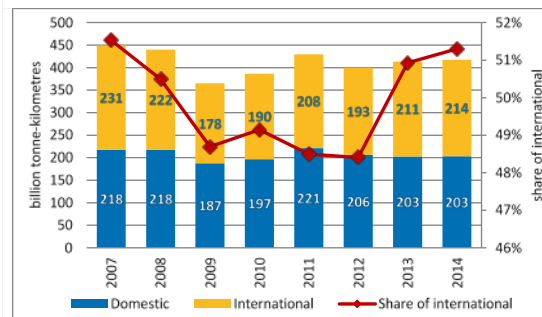


Figure 1 – Punctuality of long distance passenger services, percentage of services on time



- **Freight traffic:** 10% shrinking (no data of trainkm growth) | punctuality: n/a

Figure 1 – Evolution of rail freight traffic volumes



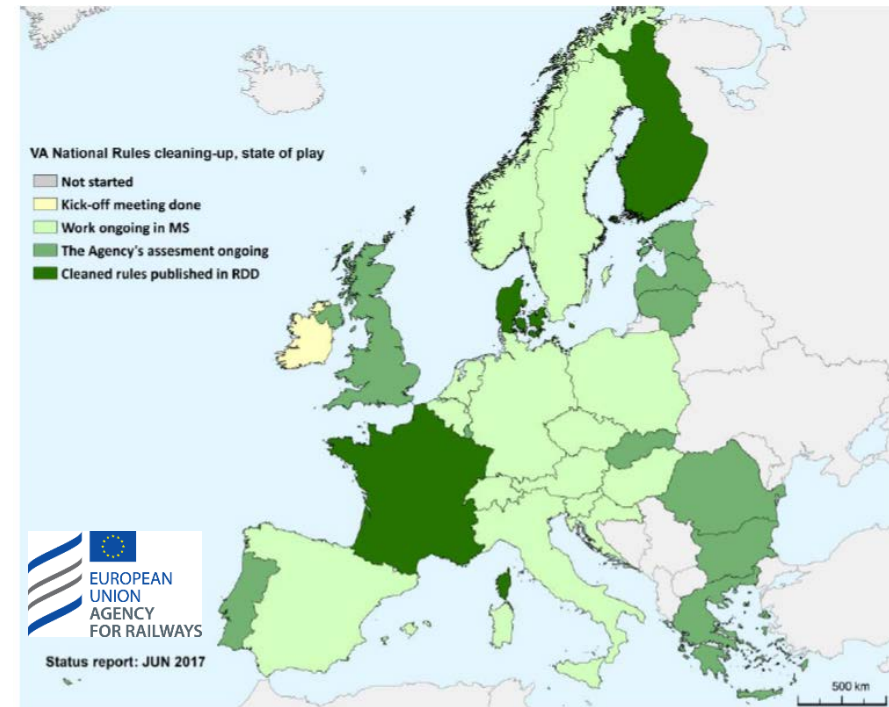
Source: RMMS



Rail freight quality:

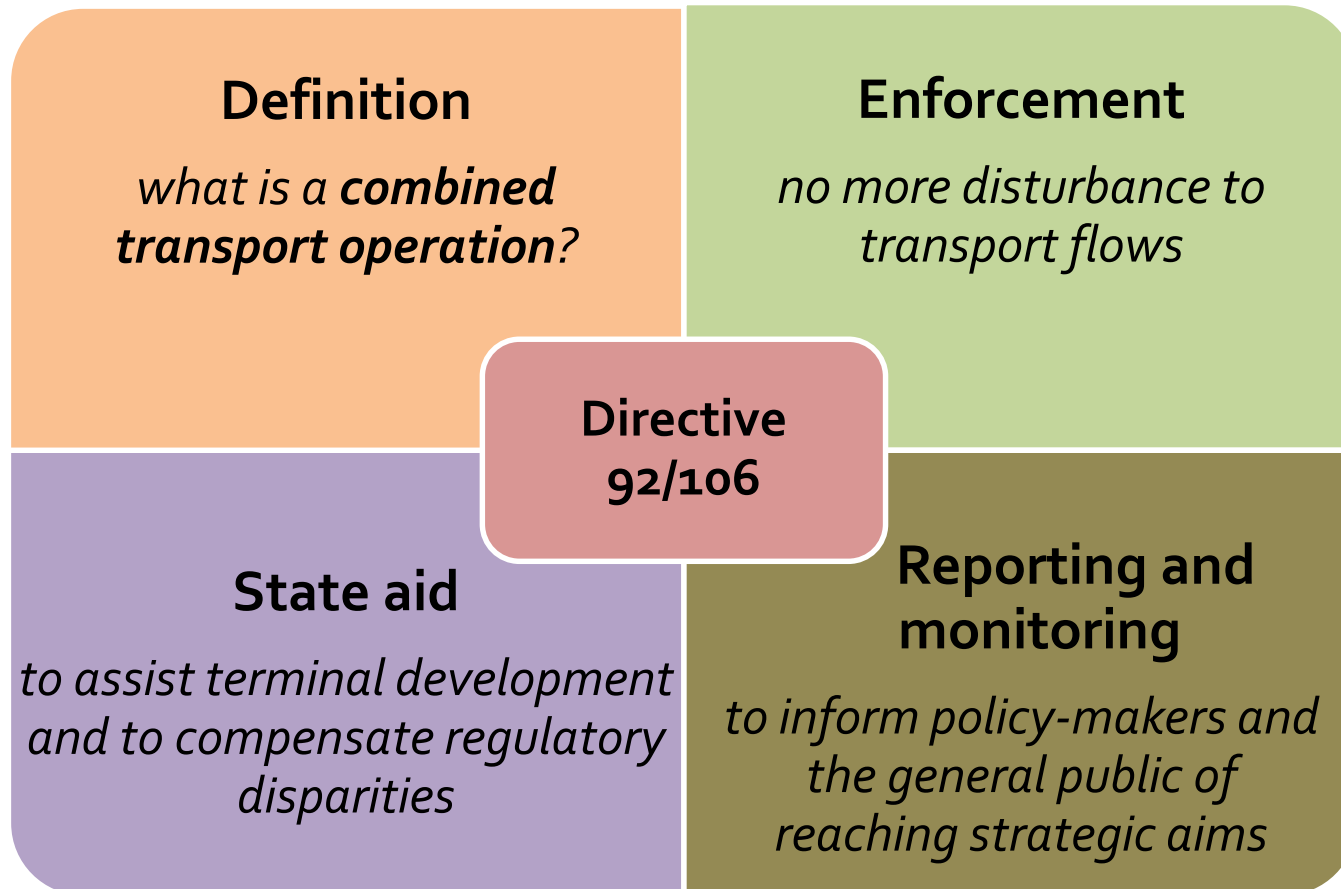
- The EU RMMS Report does not contain data
- Sector data collection (UIRR, RFCs) shows great variations with average est. below 50% (to 30 minute standard)

- **Clean-up of national rules**: work in progress at ERA – core countries lagging behind
- **UIC Leaflets vs ERA TSIs**: persistent lack of clarity; some progress in changing UIC Leaflets
- **Traffic rules**: no European priority rules, passenger traffic is prioritised over freight (even when latter is on time)
- **Path allocation rules**: freight comes after passenger when deciding access to the tracks – without proper social benefit analysis
- **Infrastructure development**: lack of fair competition for investment resources between freight and passenger needs



- **Intermodal uncertainties**: ageing and imprecisely worded Directive 92/106 impedes uniform application of rules, which results in enforcement-related disruptions in some Member States
- **Voluntary standards**: codification- and identification-related heterogeneity causes extra costs and losses of efficiency
- **National compensation schemes**: unpredictable national schemes reduce the value and effectiveness of compensation and promotional measures extended to intermodal actors and/or users
- **Unclear goals**: lack of coordination between Member States and mode-specific regulators in the goals to be achieved by intermodal transport result in wasteful use of resources







Multimodal transport

Goods transportation that employs more than one mode of transport.

Intermodal transport

Multimodal goods transportation where the cargo is carried in an intermodal loading unit throughout the entire journey.

Combined transport

Intermodal goods transportation where the road legs of the journey are kept to a minimum, while the longest possible section of the distance is covered by non-road modes of surface transport.

TOPICS IN 2017

- **Amendment of the Combined Transport Directive**
 - definition, enforcement, state aid rules, reporting & monitoring
- **Standardization to boost interoperability**
 - CEN/CENELEC, EU Agency for Railways, UIC, UIRR Best Practice
- **UIRR services to support daily operations**
 - ILU-Code, IT services, labels
- **Externally funded R&D projects**
 - H2020, Shift2Rail, CEF Transport



Outlook until 2020

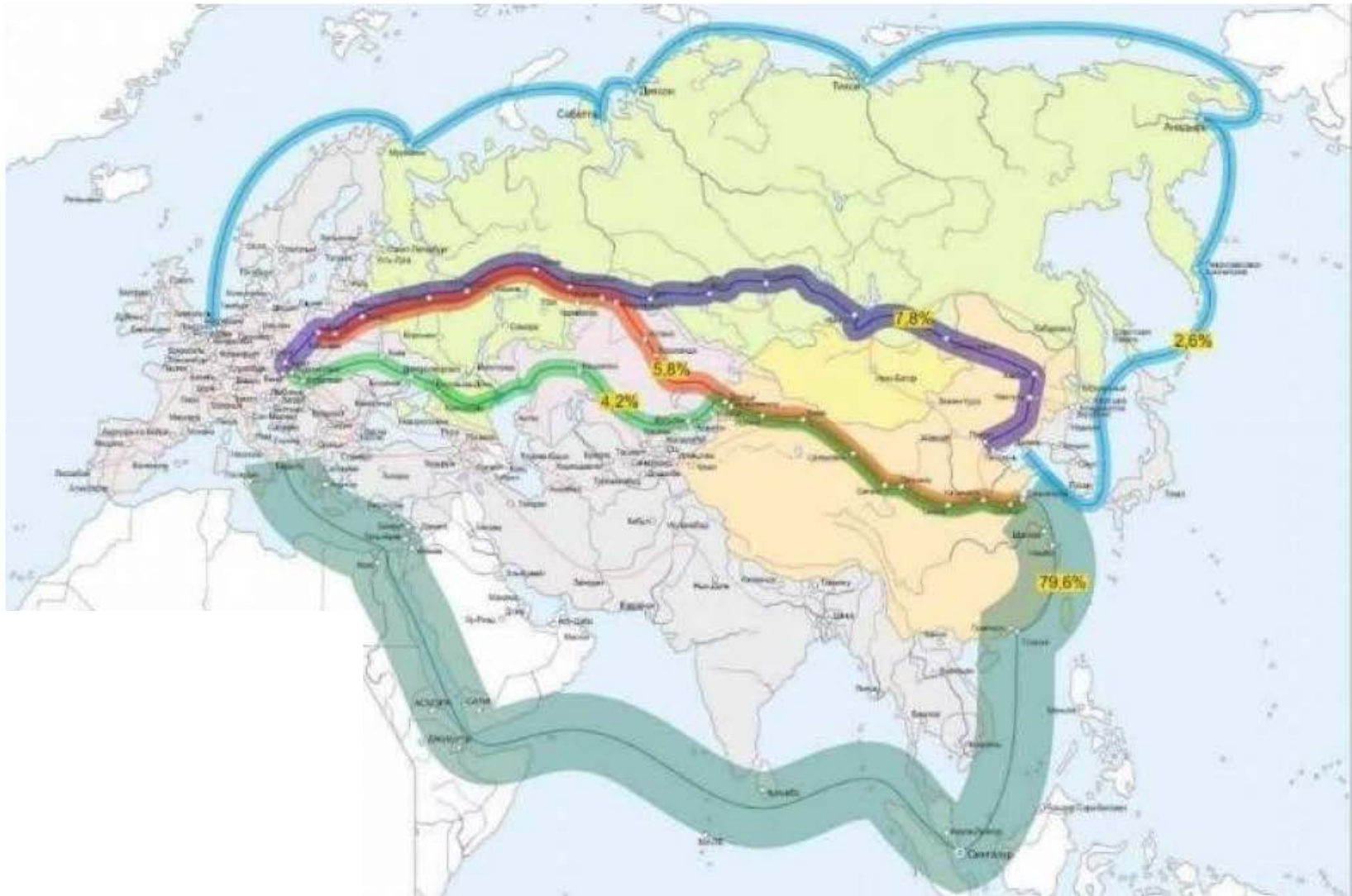
- From 28 cities in China, as well as several other points in South Korea
- To 29 cities in 12 EU Member States (2016)
- 1700 trains on 51 routes (2016)

and these numbers are rapidly growing

The declared goal of the Chinese government is to reach 500.000 TEU traffic in 2020.

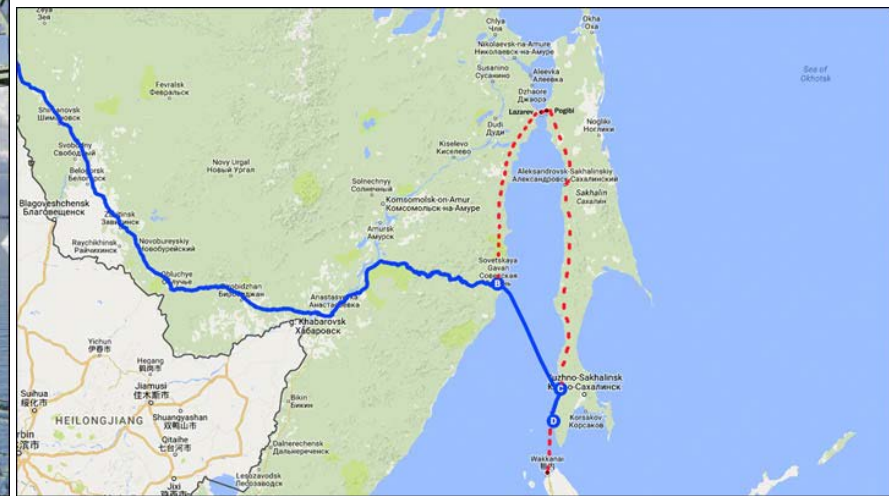
---which is backed by \$160 billion pledged to rail infrastructure developments





Russia proposed to extend the Trans-Siberian Railway from Vladivostok via a newly constructed railway bridge over the Shakhlin strait to Hokkaido.

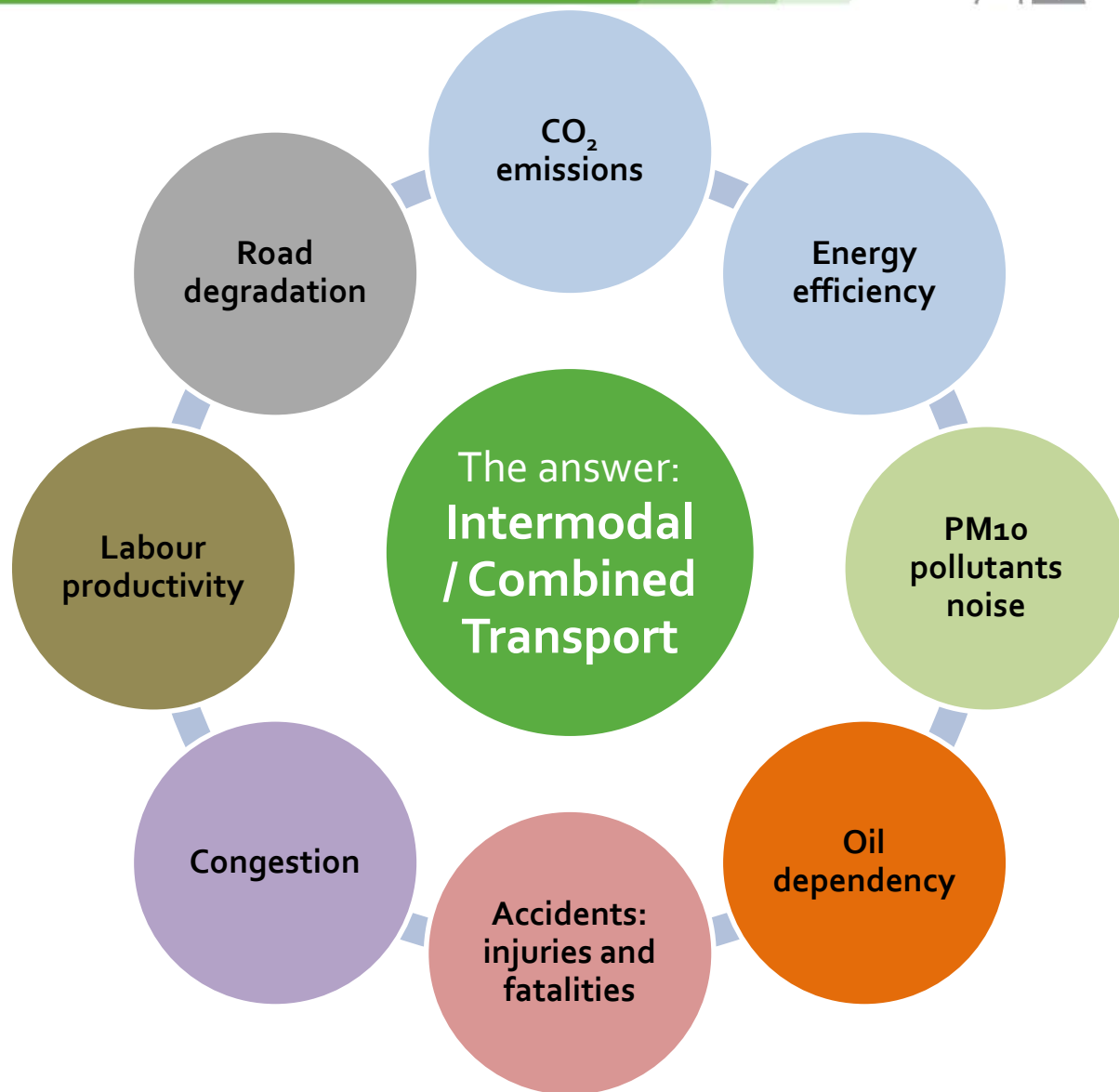
(Eastern Economic Forum, 6-7 September 2017)



The challenges of longer distance freight transport



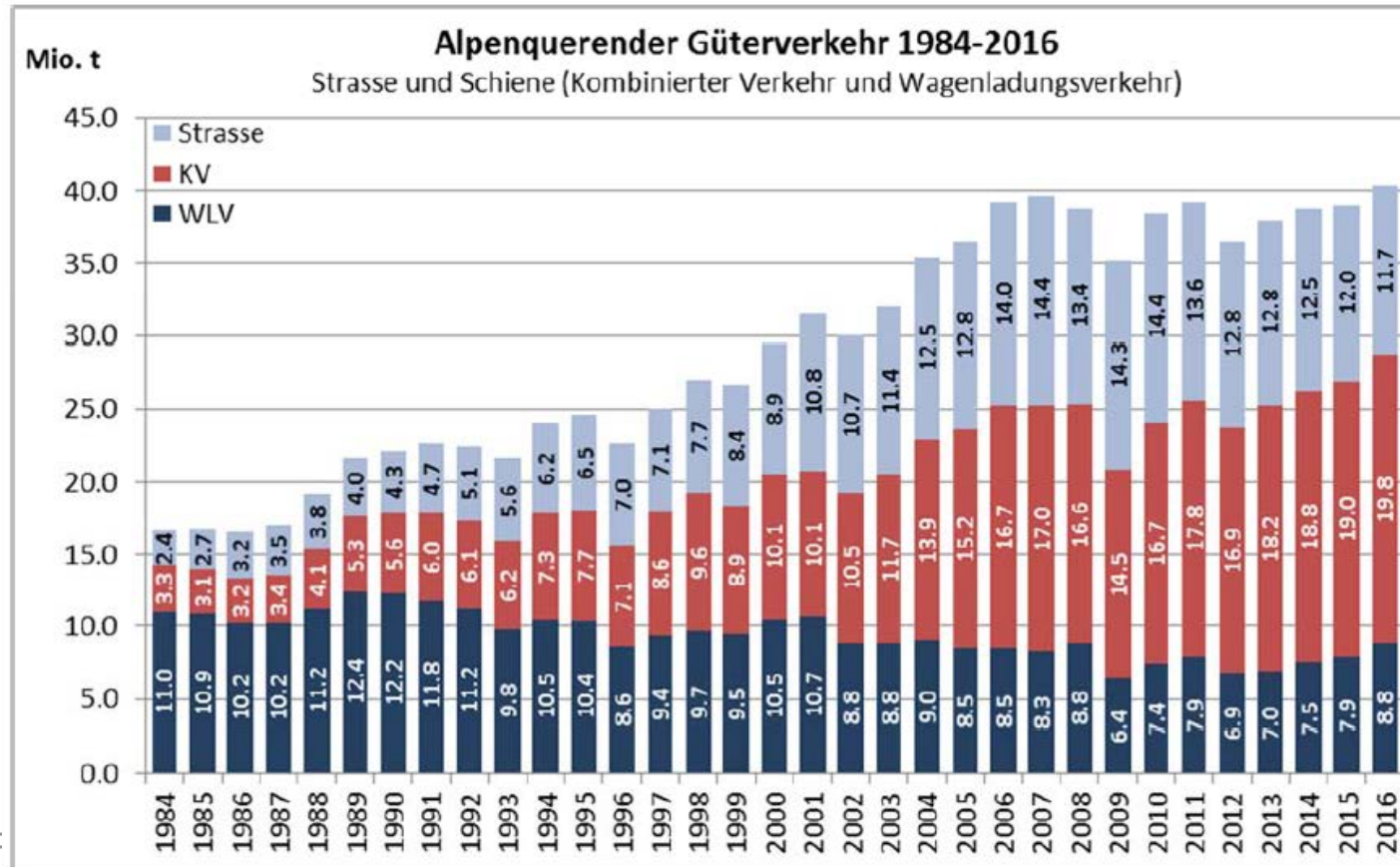
- **Climate**: CO₂ and energy efficiency
- **Environment**: air and noise pollution, vibration
- **Public security**: oil dependency
- **Safety**: accident injuries/fatalities and material losses
- **The economy**: GDP loss due to congestion
- **Employment**: labour productivity
- **Infrastructure**: road degradation and spatial constraints



...if and where the framework conditions are right

- ✓ Rail infrastructure is developed coherently with strategic goals
- ✓ Recognition of freight: train path capacity allocation and traffic rules
- ✓ Development of capacities: lines and terminals (infrastructure)
- ✓ Intermodal rules are clearly defined and predictable compensation is offered

Transalpine
traffic
through
Switzerland
1984 – 2016



THANK YOU

For your attention

