



Union Internationale des Sociétés de Transport Combiné Rail-Route

COMBINED TRANSPORT Money-saving opportunities

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Combined Transport

Definitions

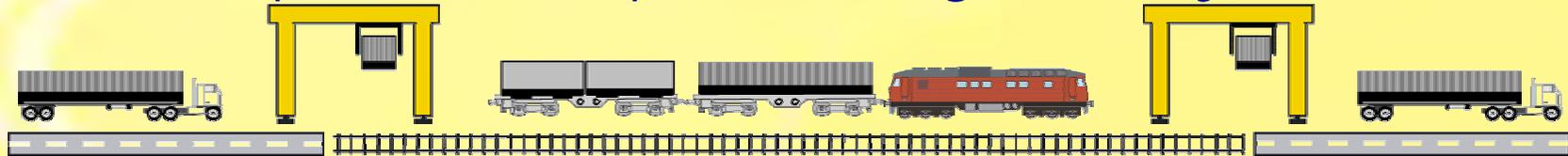
Source: EC/ECMT/UNO

- MULTIMODAL TRANSPORT
Carriage of goods by two or more modes of transport
- INTERMODAL TRANSPORT
The movement of goods in one and the same loading unit or road vehicle, which uses successively two or more modes of transport without handling the goods themselves in changing modes
- COMBINED TRANSPORT (CT)
Intermodal transport where the major part of the European journey is by rail, inland waterway or sea and any initial and/or final leg carried by road are as short as possible



Techniques

Unaccompanied Transport (*loading unit only*)



- Differences in:**
- road resp. rail distances
 - equipment / transshipment yards
 - type of wagons
 - economics
 - traffic catchment area
 - customers' profile
 - specific advantages

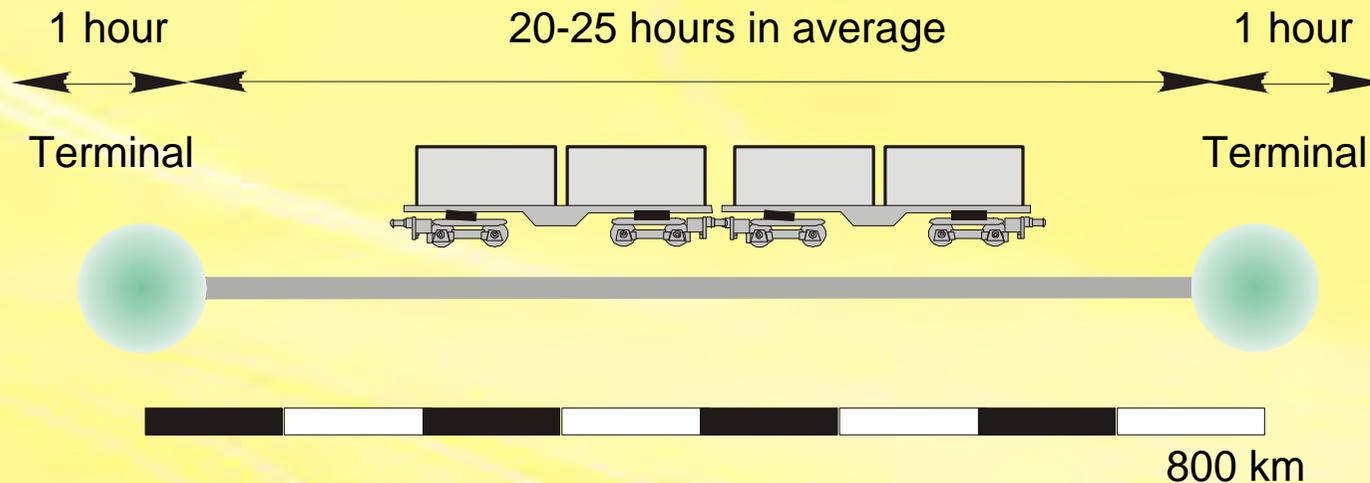
Accompanied Transport (*full truck with driver*)





Road-Rail Combined Transport

Catchment areas of unaccompanied CT

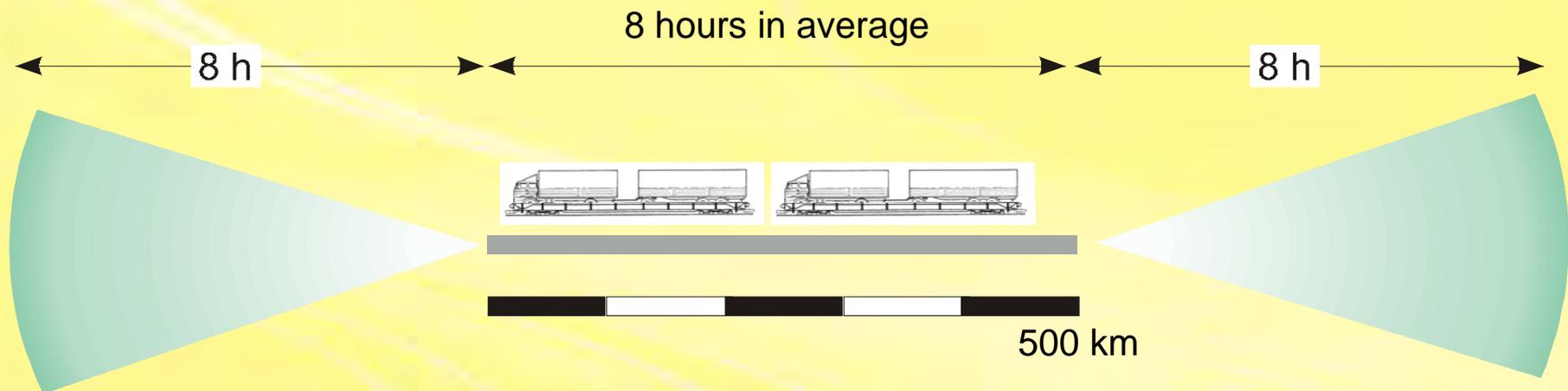


 Catchment area up to 50 km around the terminal, average road distance 20 km



Road-Rail Combined Transport

Catchment areas of accompanied CT (RoMo)



Catchment area funnel-shaped
(corresponds to driving time road up to 8 hours)



Money-saving opportunities

- For the Authorities:
 - in terms of investment needs (infrastructure)
- For the business sector:
 - in terms of reduced forwarding costs
- For the public at large:
 - in terms of environmental benefits



General advantages

- relief of the road network
- transfer of goods to a safer, more environment-friendly and more weather-independent transport mode
- better sharing of transport volumes between modes
- recourse to available transport capacities
- co-operative activity combining the advantages of road (flexibility) and rail (more economical, mass transport on longer distances)
- competitiveness under given circumstances



Advantages of non-accompanied CT

- **Savings in variable costs (fuel, tyres, maintenance)**
- **Reduction in personnel (drivers, driving hours, night work)**
- **Easier enforcement / control over work regulations**
- **Improved organisational flexibility**
- **Exemption / reduction of road taxes**
- **No/less road transport permit requirements**
- **Reduced vehicle parks / increased truck lifetime**
- **Non-application of Sunday / holiday circulation bans**
- **Less damage claims concerning transported goods**



Road-Rail Combined Transport

Advantages of accompanied CT (RoMo)

- Overall cost advantages vs. road-only transportation
- Border crossings without permit requirements
- Savings on road taxes
- Train-trip recognised as drivers' rest-time
- Weight advantage in Alpine transit
- Exemptions from Sunday/holiday circulation bans
- Easier customs-clearance in terminals



Reduced forwarding costs

- Mega-truck study (TIM Consult-UIRR-Kombiverkehr)
 - Detailed comparative cost-analysis of 776 Germany-related door-to-door journeys
 - CT more cost-efficient than road-only in 59% of the segments considered



Road-Rail Combined Transport

Environmental benefits versus road only

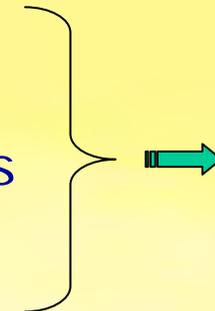
	<i>Reduction in CO₂ emission</i>	<i>Energy savings</i>
Unaccompanied CT □ sample of 18 axes	60%	29%
Accompanied CT □ sample of 2 axes	23%	11%



Political support

Grounds

- Importance of transport
- Planning of infrastructure investments
- Trends in freight traffic



Better
transport



Road-Rail Combined Transport

The importance of transport

By its purposes

- Mobility of people, for leisure and business
- Moving of goods for supply and distribution
- Integration of peripheral regions
- Optimisation of industrial location

By its figures (2004)

- Employment: over 16 million People
- Value created: over 400 billion EUR
- Investments: over 80 billion EUR
- Household expenditure: over 13% of private income
- Freight: over 2300 billion TKM (20 tkm per person and per day)



Freight traffic development

Recent trends (EU – inland modes)

Traffic

	Road	Rail	Inland Waterway	Pipelines	Total	UIRR (Combined Transport)
1995	1248	358	120	105	1831	
2004	1684	379	130	124	2317	
2004/1995	+35%	+6%	+9,0%	+18,0%	+27,0%	+39%
Average	+3,4%	+0,6%	+1,0%	+1,8%	+2,6%	+3,7%

Modal split

1995	68,1%	19,6%
2004	72,6%	16,4%

Projections

Further sustained increase:

- Total traffic: close to 40%
- Non-acc. CT: +135% between 2002 and 2015
(Capacity Reserves Study UIC/UIRR)



Political support

Ways

- Timely planned infrastructure enhancements
 - Interoperability
- Proper framework conditions
 - Equitable intermodal and intramodal competition (Rail packages, liberalisation)
 - Stable operational parameters
 - ILU's, weights and dimensions
 - Fair access to the infrastructure
 - Guaranteed slots, harmonised pricing
- Accompanying financial measures
 - Start-up, projects, compensation rules



Stakeholders' commitments

CT Operators (UIRR)

- Neutral interface between road and rail
- Efficient marketing and provision of service
 - Full trains (economies of scale)
 - Supporting documents (legal, safety...)
 - Information systems
- Competitive prices

Rail sector (RUs and GIs)

- Implementation of contractual commitments
- Quality of service
- Controlled prices



Road-Rail Combined Transport

UIRR - Structure

Founded October 1970 – Munich

**Professional Union functioning at
two parallel interactive levels with the exclusive aim to
develop mainly Road-Rail CT**



LIAISON OFFICE BRUSSELS

- = overall promotion of CT
- = coordination of members' activities
- = service center (projects)

MEMBER COMPANIES

- = organising and marketing of CT

Board of Directors
Working groups



UIRR - Member companies (1)

- Types
 - Full members (20)
 - Associated member (1)
- Geographical coverage
 - Europe-wide: 11 EU countries / 3 non EU (CH, HR & RO)
- Shareholding
 - Road-hauliers / transport commissioners / logistic companies
 - National federations of same
 - National railway undertaking
 - UIRR sister companies



UIRR - Member companies (2)

- Assets
 - Wagons in ownership (around 13 000)
 - Management (ownership) of transshipment yards (terminals)
 - EDI systems (CESAR)
- Activities
 - Terminal-to-terminal organisation and marketing of CT
 - International and/or national
 - Non accompanied and/or accompanied
 - Interface between service suppliers and market
 - Link to national political Authorities



Road-Rail Combined Transport

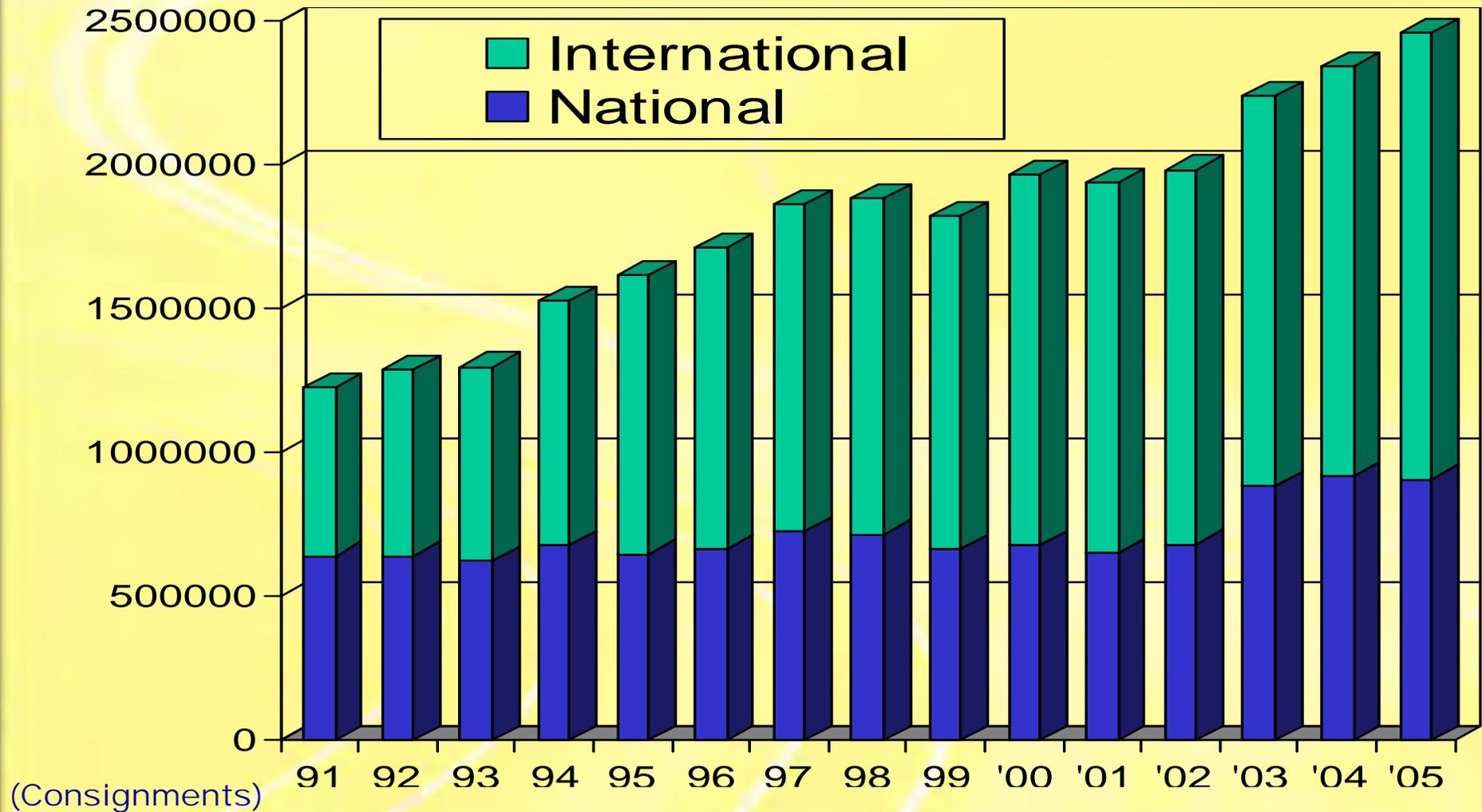
UIRR Member Companies' Geographical location





Road-Rail Combined Transport

UIRR – Achievements 1991-2005 (1 of 3)





Road-Rail Combined Transport

UIRR – Achievements 2004/2005 (2 of 3)

	International			National			Total		
	2004	2005	% 05/04	2004	2005	% 05/04	2004	2005	% 05/04
Unaccompanied	1 114 364	1 280 069	+15%	846 775	861 830	+2%	1 961 139	2 141 899	+9%
Accompanied	312 329	271 311	-13%	69 786	44 369	-36%	382 115	315 680	-17%
Consignments	1 426 693	1 551 380	+9%	916 561	906 199	-1%	2 343 254	2 457 579	+5%
Total TEU	3 281 394	3 568 174	+9%	2 108 090	2 084 257	-1%	5 389 484	5 652 431	+5%

Consignment = 2,3 TEU



UIRR - Achievements 2005 (3 of 3)

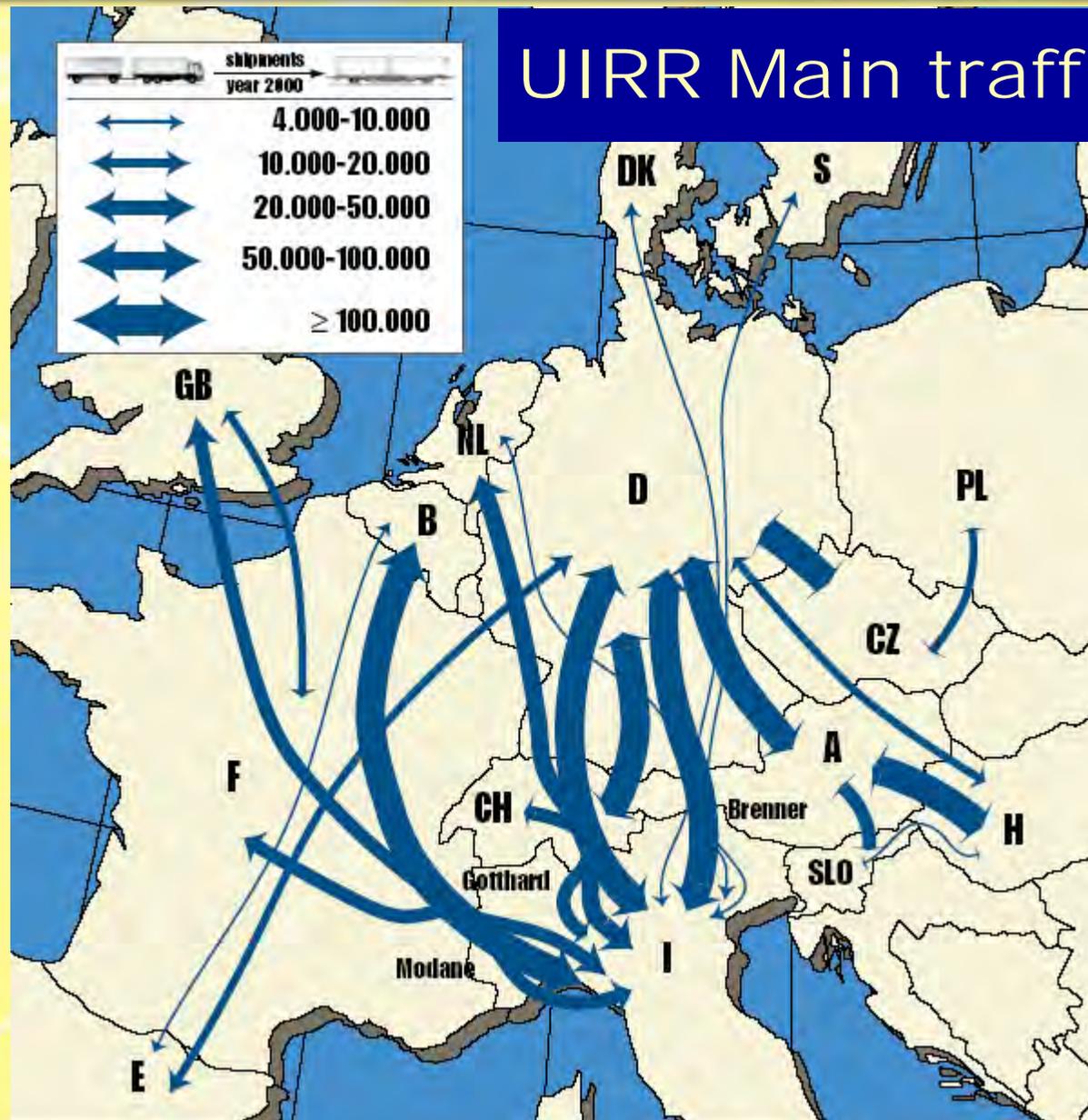
UIRR members' traffic

- 10 000 truck loads daily on longer distances
 - 80% swap bodies/containers (↑)
 - 7% semi-trailers (↔)
 - 13% rolling road (↓)
- 500 full trains each working day
- > 70% of CT brought by operators to RU's for which this transport system represents 20% of their freight tkm
- > 20% of total transalpine freight traffic



Road-Rail Combined Transport

UIRR Main traffic flows





UIRR Central and South East Europe

- Member companies in Poland, Czech Republic, Hungary, Slovenia, Croatia and Romania
- Further build-up of its pan-european network (Serbia, Montenegro, Greece, Turkey, Bulgaria)



The opportunities for Croatia

- Accession to the EU
- TEN-T (in partic. rail corridors V and X)
- Crokombi in good ascent, with the support of the UIRR network