



Balkans Intermodal & Logistics
SEE Freight Transport Logistics Conference

The Potential of Road-Rail Combined Transport in the European Union

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Rudy COLLE
Executive Chairman

Combined Transport – UIRR

The ideal match

Images that speak for themselves



40-year Anniversary videofilm: <http://uirr.com/en/media-centre/videos/mediacentre/364-uirr-40-years.html>

Combined Transport - Figures that speak for themselves



1 in 4 European freight trains was a Combined Transport train

- 80BN tkm in 2010, or 28,5% of total rail freight performance
- CT is the most dynamically growing segment of rail freight

400 Terminals connected by nearly 2000 trains a day

- A network that spans the continent

11% of European cargo movements

- Uses Road-Rail Combined Transport

6-7% = long-term average annual growth rate

- Realised by Road-Rail Combined Transport since the late 1990s

75% fewer proportional GHG emissions and 30% less energy needed

- By Road-Rail Combined Transport in comparison with pure-road transport

40-times fewer accidents

- In comparison with road transport



■ Exclusive mission

The development of mainly Road to Rail Combined Transport

(a transport system where, to be in accordance with the recognised definition the initial and/or final legs carried out by road are to be kept as short as possible)

■ Structure

LIAISON OFFICE BRUSSELS
<ul style="list-style-type: none">• Promotion• Coordination• Service centre• Projects <p>• Seat: Montoyerstreet 31 box 11 1000 Brussels (Belgium) www.uirr.com headoffice.brussels@uirr.com</p>

MEMBER COMPANIES (18 CT operators)
<ul style="list-style-type: none">• Organisation and marketing of CT• Supply of (full) train capacities on a European-wide network• Provision of wagons and state-of-the art IT systems• Management of terminals <p>• Seat: 15 (EU/non EU) countries</p>

UIRR – The products



Unaccompanied CT



Transshipment of the loading unit
(swap body, container, semi-trailer)

*85% of UIRR traffic
(2009)*

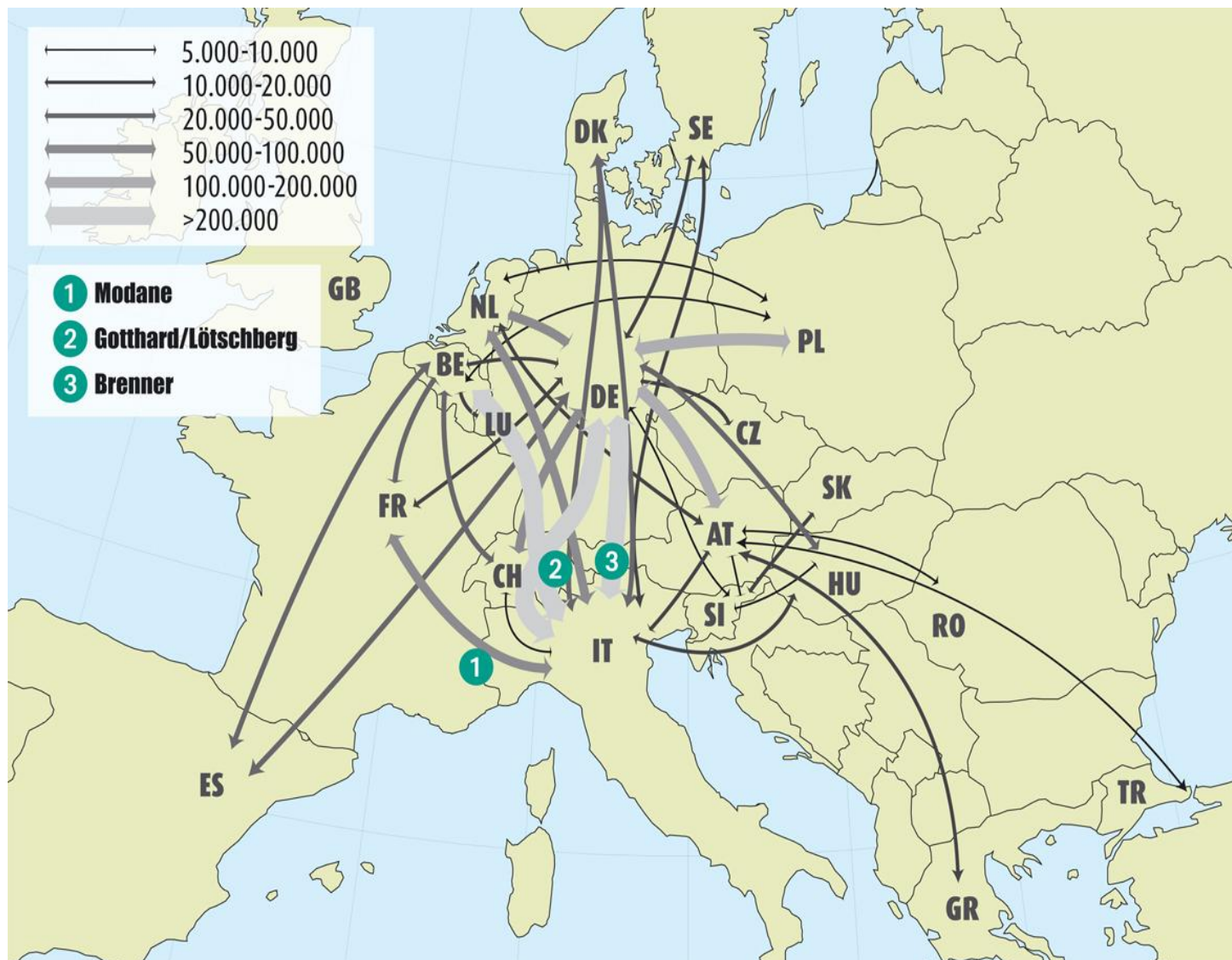
Accompanied CT



Forwarding by train of the
complete truck
(including its driver)

*15% of UIRR traffic
(2009)*

UIRR – The Main Flows

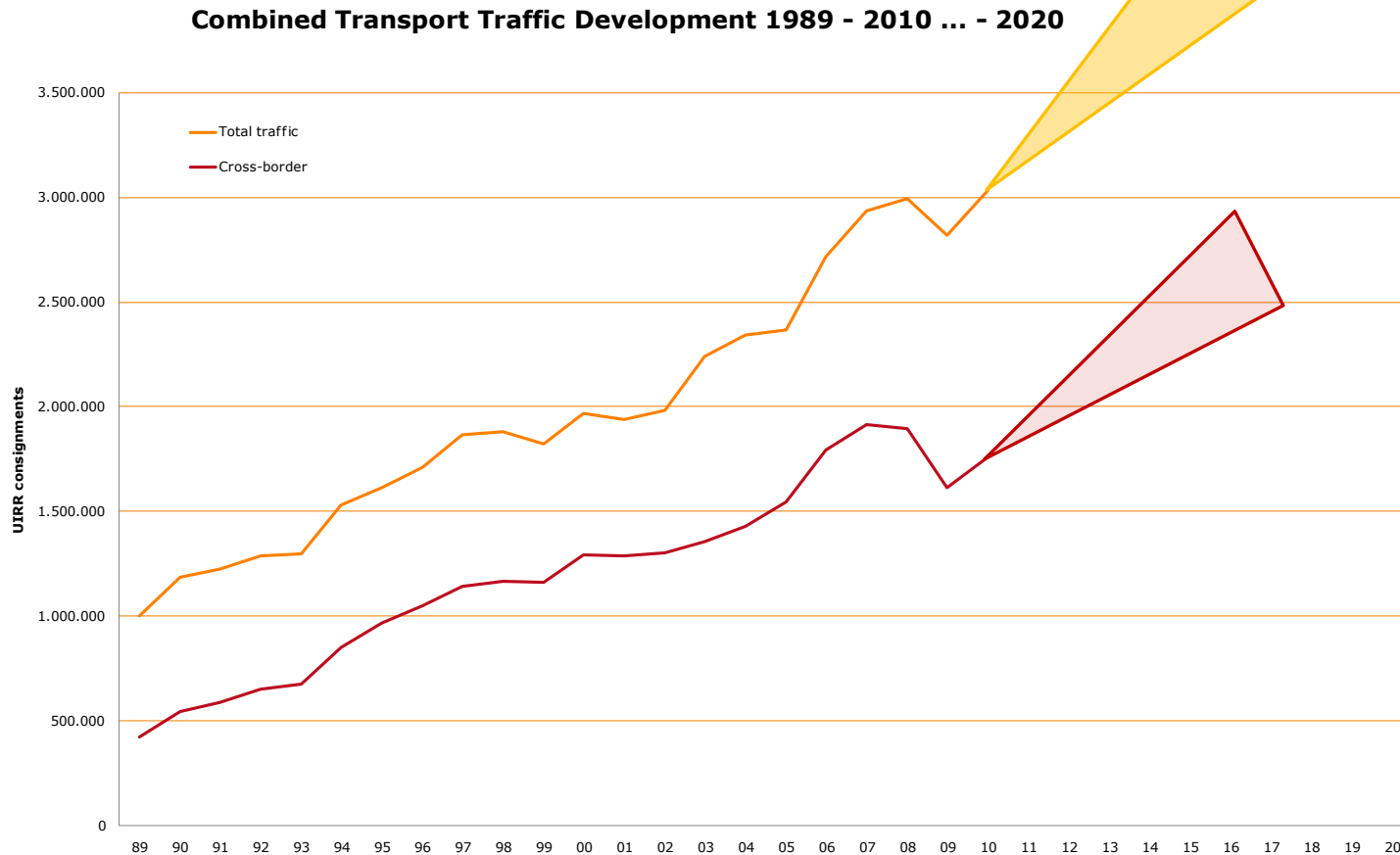


UIRR – Traffic figures 2009-2010



	International			Domestic			Total		
	2009	2010	% 10-09	2009	2010	% 10-09	2009	2010	% 10-09
Unaccompanied CT	1 385 659	1 509 152	9%	1 016 710	1 073 461	6%	2 402 369	2 582 613	8%
Accompanied CT	229 276	250 663	9%	186 704	197 589	6%	415 980	448 252	8%
Total CONSIGNMENTS	1 614 935	1 759 815	9%	1 203 414	1 271 050	6%	2 818 349	3 030 865	8%
Total TEU	3 229 870	3 519 629	9%	2 406 828	2 542 100	6%	5 636 698	6 061 729	8%

UIRR - Performance and outlook of Combined Transport



- **20% - 30% - 80% of European CO₂ emissions must be saved by 2020-2030-2050:** can not be done without major intervention in transport as it is the largest emitting sector.
- **50% of long-distance road-freight transport (distances over 300km) to be shifted to sustainable modes** the European Commission's Transport White Paper 2011

Development of Road-Rail CT in SEE - Conditions



Framework considerations

- The price of oil – and oil-based fuels – continues to increase
- The average speed and punctuality of road transport is gradually declining
- The safety and security indicators of road transport remain favourable
- Considerable difficulty of recruiting truck drivers for long-distance assignments
- Usage based road tolling and internalisation of transport externalities coming

A weakness translating to an opportunity

- Transport infrastructure is underdeveloped in SEE
- EU provides considerable funding for rail (corridor) development
- Positioning road transport can be efficient even without an extensive highway network

The advantage of location

- Increasing importance of Black Sea ports and the need to establish their hinterland connections
- Organising Trans-Balkan services connecting Turkey and Greece to the EU

The optimal solution: **road-rail Combined Transport**

EU White Paper - Tasks for the decades



Fulfilling the **European Commission's vision** would require the **tripling of rail freight's prevailing market share** translating to **quadrupling of rail freight's current performance.**

Within the rail sector

- Honest and fair **competition to release market mechanisms** needed to enhance quality and customer service mentality in parallel with **complete de-politicisation** of (incumbent) railways
- Establish **technical interoperability** and **regulatory harmonisation**
- Sustained **investment to create new capacities** both extensively (by building new lines) and intensively (train density) through signalling and other traffic management systems necessary

Within the world of transport

- Mode neutral regulation allowing fair **competition based on technological merits** including **internalisation of externalities**, **non-interventionist transport-taxation** and introduction of **usage-based charging schemes for accessing public transport infrastructure** and effective **enforcement of existing rules**

Within the economy as a whole

- Major freight traffic generating sites (manufacturing plants, distribution centres, etc.) should be made **accessible directly by rail**, and/or **density of CT terminals increased.**



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Tasks for the logistics players on the Balkans



Develop the transport infrastructure optimised for the future: Combined Transport

- Terminals
- Rail lines
- Customs clearance facilities

Regulatory environment

- Fair road tolling and rail access charging regimes
- Internalisation measures
- Efficient enforcement of traffic rules

Logistics sector

- Road vehicles (trailers) for the positioning of ILUs
- Flat wagons
- Information systems connecting players
- Combined Transport operators(s)
 - Membership UIRR

+ Encourage the use of ILUs in general



UIRR – Member Companies



Road-Rail CT = Effectively inserting electric rail into contemporary transport-chains



THANK YOU FOR YOUR ATTENTION



UIRR scr

Phone +32 2 548 78 90

headoffice.brussels@uirr.com

www.uirr.com