



An afternoon with Combined Transport:

## The strategic potential and vision of European CT Operators

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# Figures that speak for themselves

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## **1 in 4 European freight trains was a Combined Transport train**

- Over 90 billion tkm in 2011, or over one-third of total rail freight performance
- Most dynamically growing segment of rail freight, which recovered its pre-crisis peak by 2011

## **400 Terminals connected by nearly 2000 trains a day**

- A network that spans the continent

## **12% 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

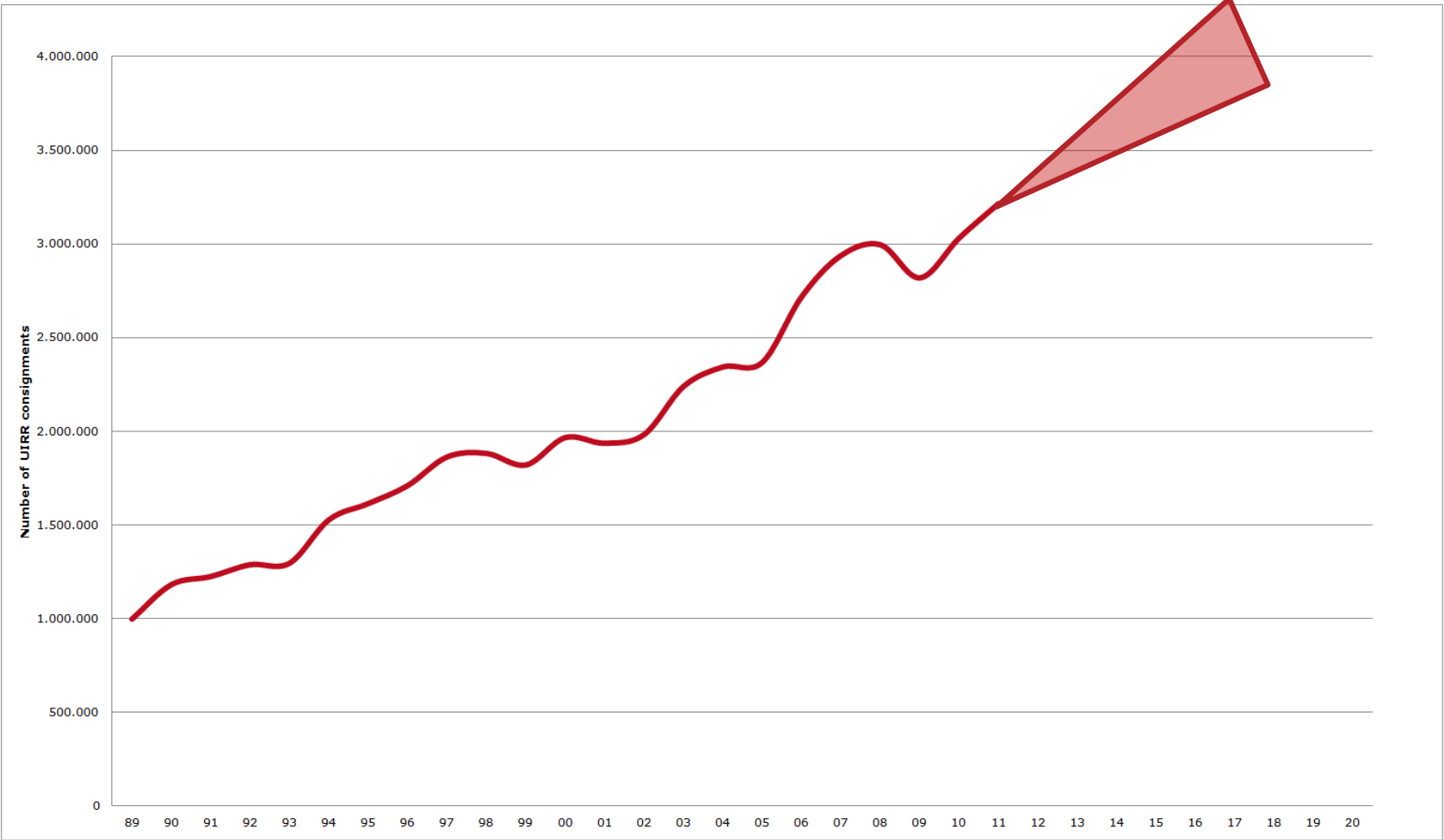
## **75% fewer proportional GHG emissions and 30% less energy needed**

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

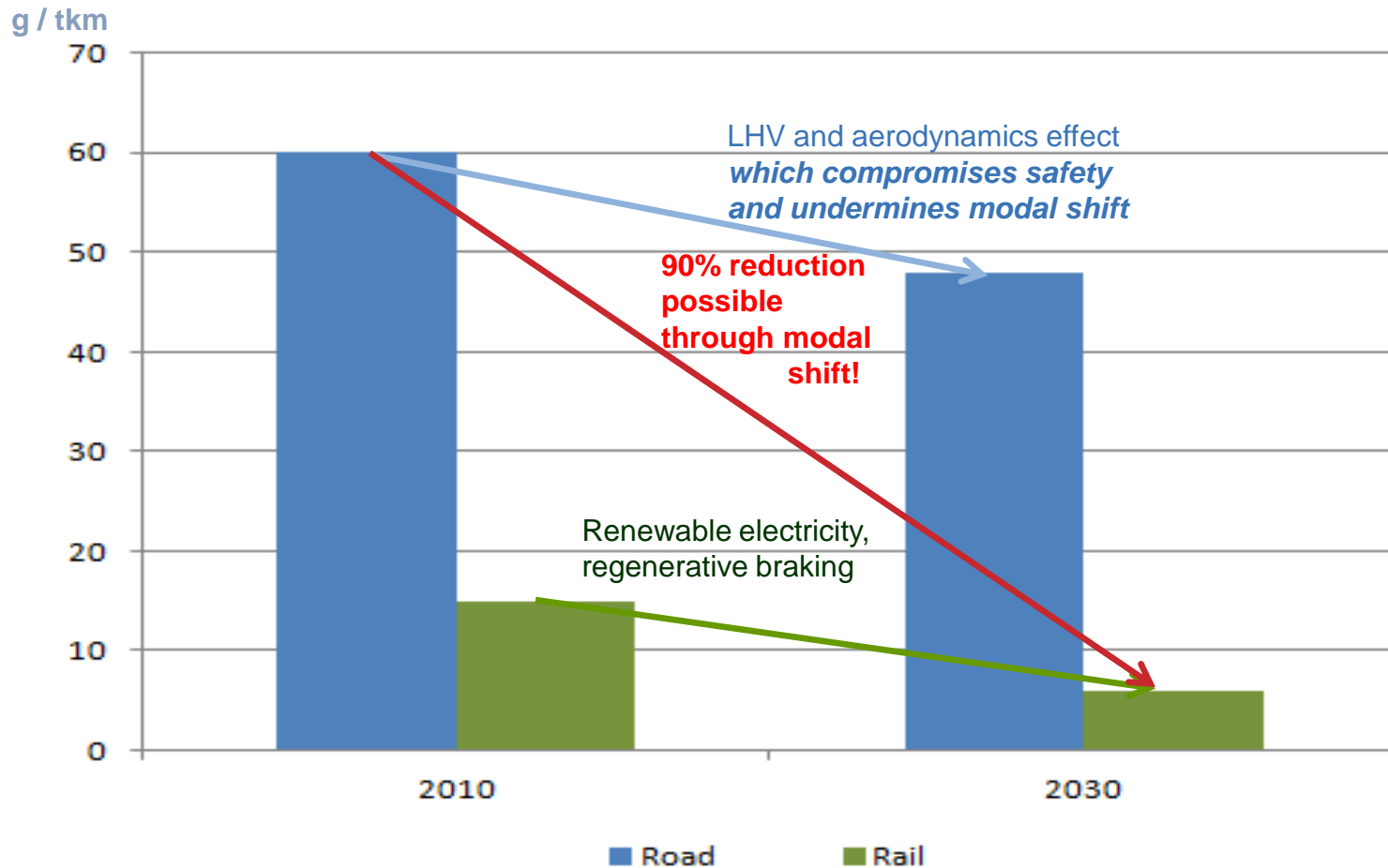
## **40-times fewer accidents**

- In comparison with road transport

# Combined Transport: Performance and outlook



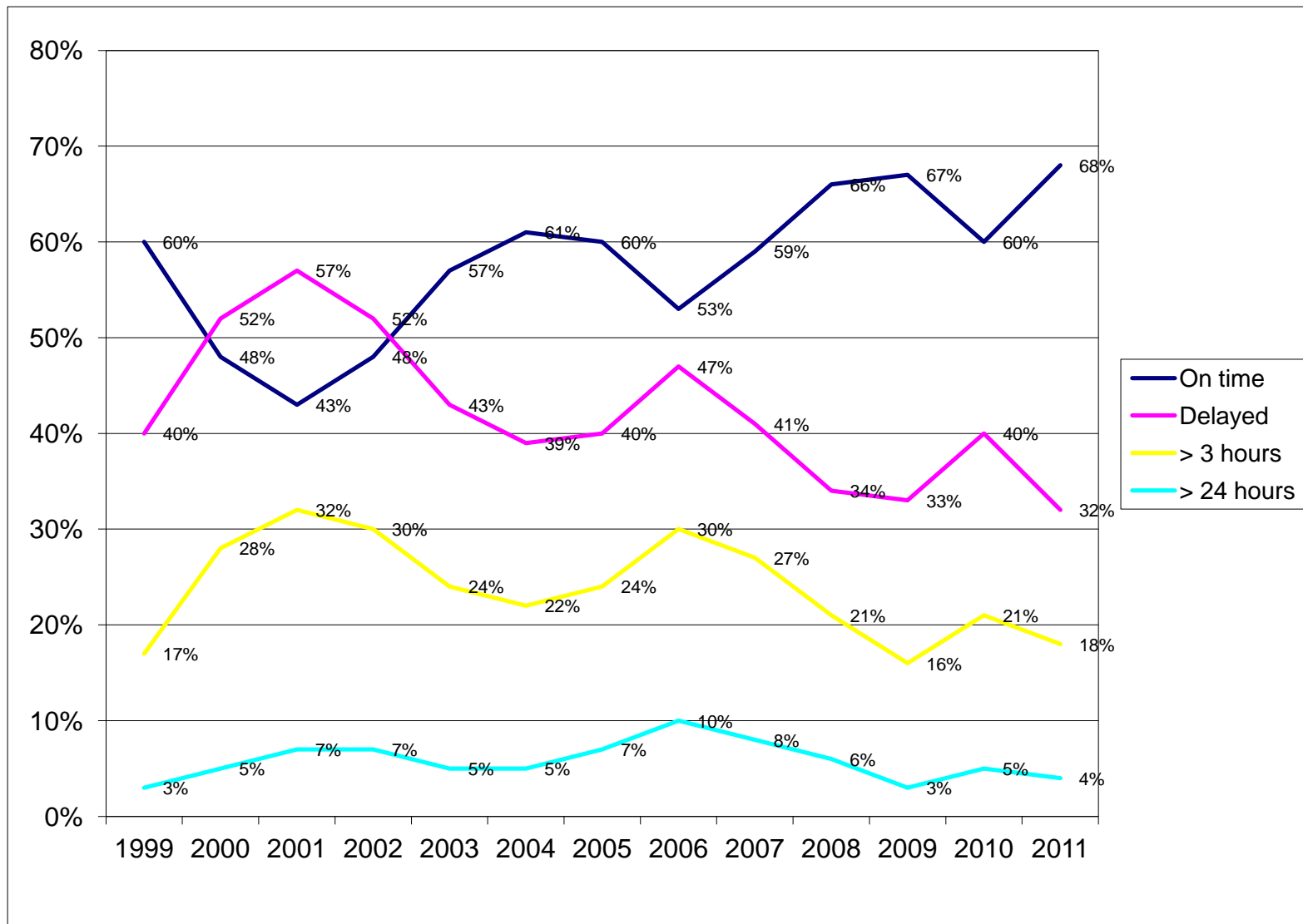
# CO<sub>2</sub> emission performance of road and rail transport



2010: Carbon footprint of electric rail traction is one-fourth of road transport

2030: Carbon footprint of electric rail traction is one-eighth of road transport

# Rail freight: Quality stagnates – must improve



(Source: INTERUNIT + estimations of the UIRR office)

# Historic milestones of Road-Rail Combined Transport



<b>1960s</b>	<ul style="list-style-type: none"><li>▪ <b>First Oil Shock:</b> Forwarding of oil burning road vehicles and semi-trailers, as well as hinterland distribution of maritime containers by rail begins in Europe</li></ul>
<b>1970s</b>	<ul style="list-style-type: none"><li>▪ <b>Cross-border CT:</b> The expansion of road-rail CT results in increased cross-border activities</li><li>▪ <b>23 October 1970:</b> UIRR is founded to aid cross-border CT and represent its interests.</li><li>▪ <b>1975:</b> The first European legislation to promote CT (Directive 75/130/EC)</li></ul>
<b>1980s</b>	<ul style="list-style-type: none"><li>▪ <b>1981:</b> The first specialised Rolling Motorway wagons appear</li><li>▪ <b>1986:</b> Horizontal transshipment begins to be phased out</li><li>▪ <b>1987:</b> The first articulated wagons appear</li></ul>
<b>1990s</b>	<ul style="list-style-type: none"><li>▪ <b>1992:</b> PACT, the precursor of the Marco Polo program, is launched by the European Commission to subsidise modal shift from road to more sustainable modes</li><li>▪ <b>1992:</b> Directive 92/106/EC lays down common rules of Combined Transport in Europe</li><li>▪ <b>1997:</b> The 'CESAR' project is launched (industry initiative for tracking and tracing)</li></ul>
<b>21st Century</b>	<ul style="list-style-type: none"><li>▪ <b>2000:</b> The EC's first Transport White Paper declares modal shift official policy aim</li><li>▪ <b>Decade:</b> European Road-Rail Combined Transport experiences a decade of growth averaging 7% annually, to be stopped only by the financial and economic crisis</li><li>▪ <b>2011:</b> The EC's second Transport White Paper intends to transfer 50% of long-distance road freight ton-kilometres to "more sustainable modes" by 2050</li><li>▪ <b>exp. 2013:</b> EC report on the development of Combined Transport</li></ul>

# EU's White Paper 2011: Key Targets for Land Freight

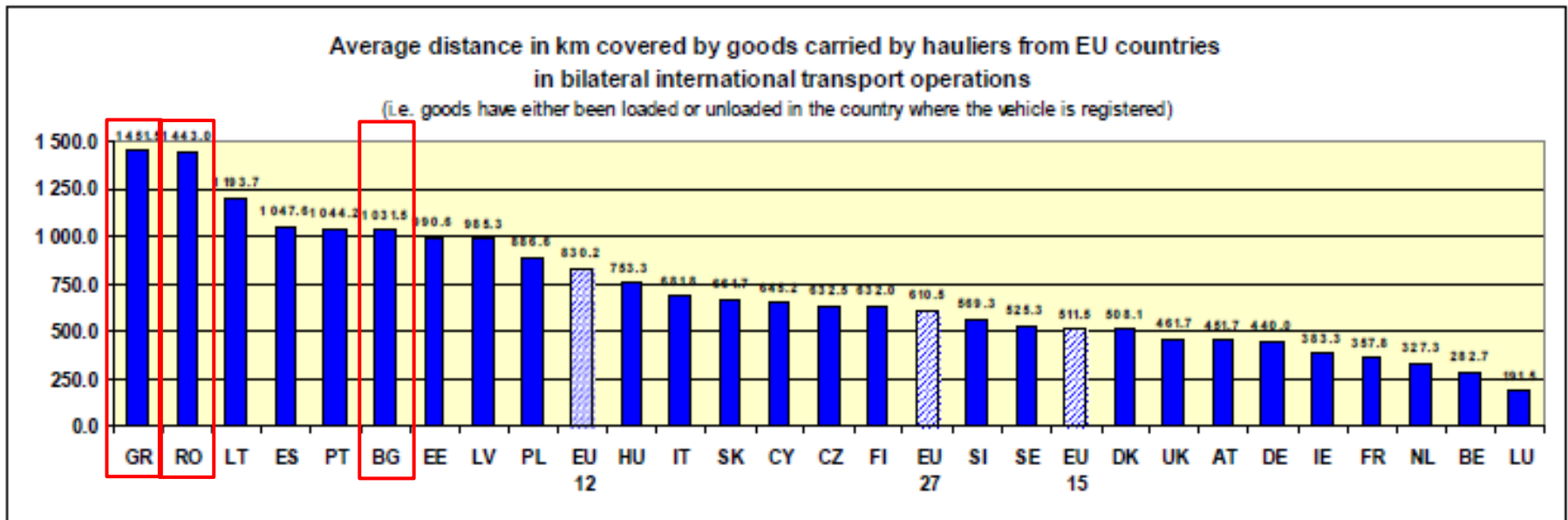


**20% - 30% - 80% of European CO2 emissions must be saved by 2020-2030-2050:**

- can not be done without major intervention in transport as it is the largest emitting sector

**30% - 50% of long-distance road-freight transport (distances over 300km) to be shifted to sustainable modes by 2030-2050:**

- 40% of road ton-kilometres were realised on distances over 500km in 2010 (Source: DG MOVE / EUROSTAT)





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** by 2050.

## Within the rail sector

- **Codification of loading gauge** on every major railway line open to freight traffic
- **Fair competition** – an end to privileged relationships between IMs and incumbents
- Establish **technical interoperability** and **regulatory harmonisation** in Member States
- 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**.



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

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## THANK YOU FOR YOUR ATTENTION



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