



**UNECE:
53rd Meeting of the Intermodal Transportation
and Logistics Working Party**

Geneva, 4 October 2010

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Post-crisis recovery: **Cautiously optimistic**



Crisis results

- Road Hauliers offer below-cost prices
- Political efforts to support road sector (postponed toll increases and internalisation measures, easing in taxation)
- Railways are not favoured (under squeeze like budgets – price increases)
- 17% decline in road-rail combined transport (2009 over 2008 in tonne-kilometres)

The recovery

- CT Operators protected as many services as possible
- Since H1. 2010: increased frequencies and new services offered
- Preliminary statistics suggest a double digit rebound in 2010
- CT operators are cautiously optimistic (situation differs from country-to-country, conditions remain fragile)





EUROSTAT / European Commission data

- National data versus Pan-European data
- Categories of measurement: tonnes versus tonne-kilometres
- Missing categories: distance-based breakdown, taxpayer spending on transport infrastructure
- Insufficient human resources devoted to transport data-collection

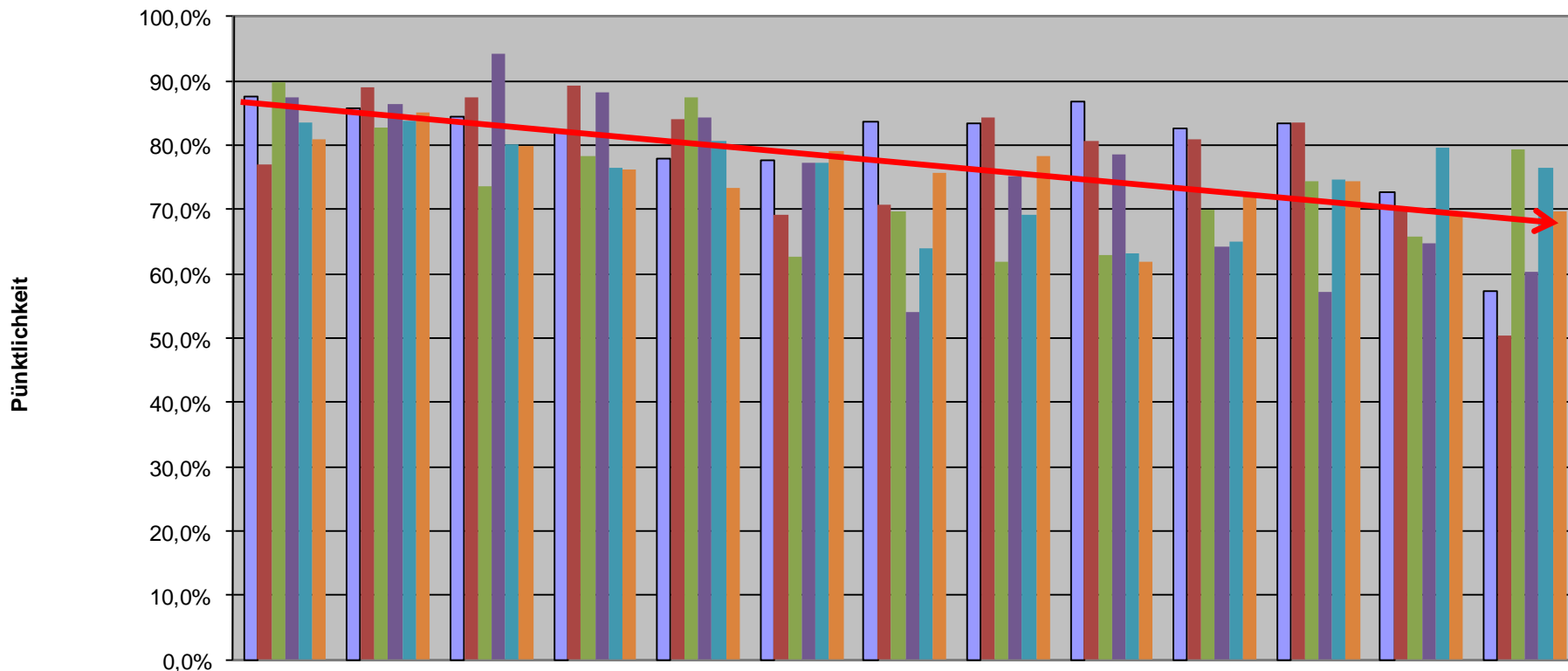
National data

- Some (!) countries with excellent data collection practice (Germany)
- Limited willingness to disclose data to EU: legislation on EU level, but financing individually by Member States

Industry data-collection

- AEA (aviation) statistics (a best practice benchmark)
- IRU (road) statistics
- UIC (rail) statistics
- UIRR Quality Monitoring Scheme

UIRR QMS: AGGREGATE FIGURES H2.2009-H1.2010



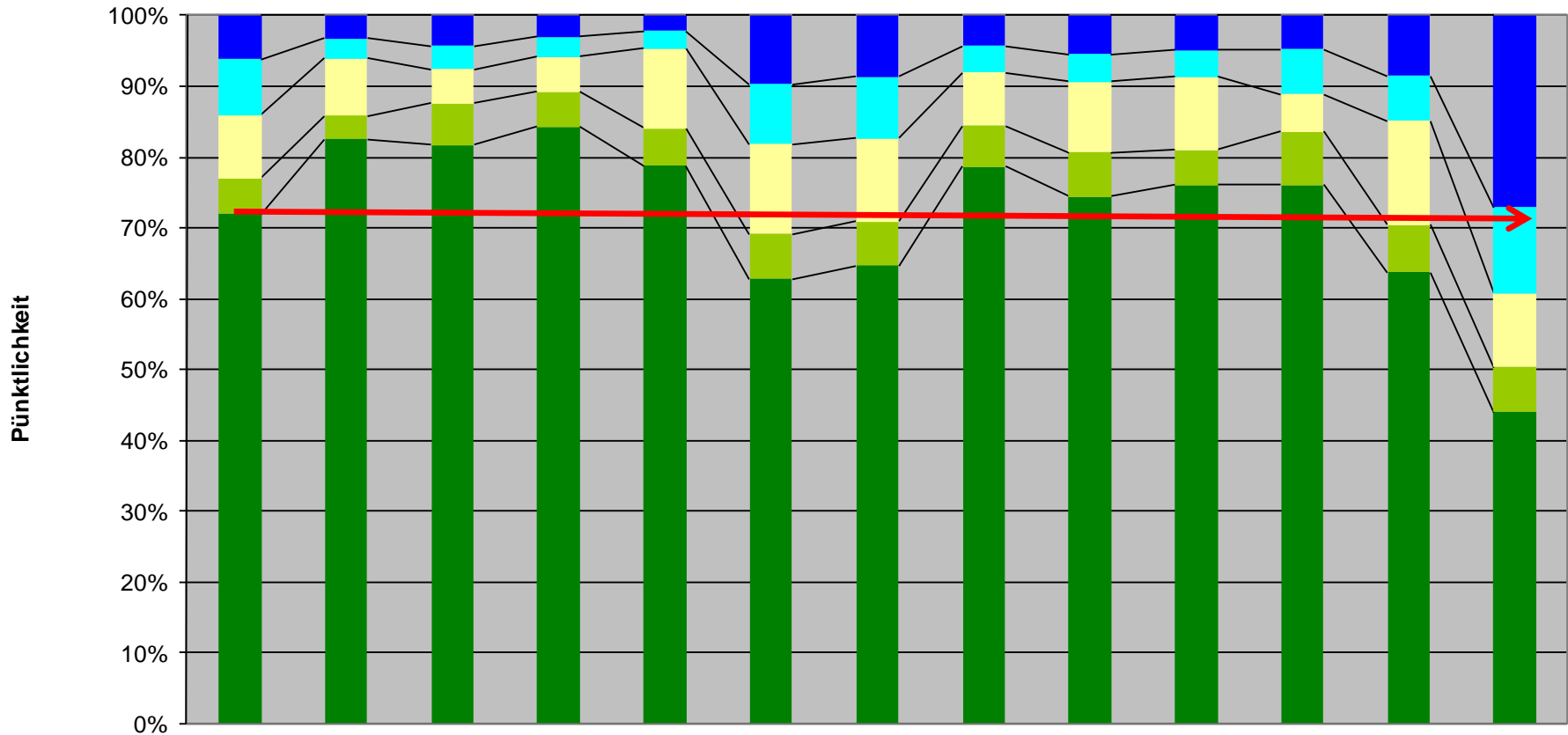
	juil.-09	août-09	sept.-09	oct.-09	nov.-09	déc.-09	janv.-10	févr.-10	mars-10	avr.-10	mai-10	juin-10	juil.-10
■ Brenner RTC	87,7%	85,8%	84,6%	82,4%	78,0%	77,7%	83,6%	83,3%	86,8%	82,6%	83,3%	72,7%	57,3%
■ Brenner TI	77,0%	89,0%	87,5%	89,3%	84,0%	69,1%	70,9%	84,4%	80,6%	81,0%	83,6%	70,4%	50,4%
■ Spanien SNCF	89,8%	82,7%	73,7%	78,4%	87,5%	62,8%	69,9%	62,0%	63,0%	70,0%	74,3%	65,9%	79,4%
■ Spanien ECR	87,6%	86,5%	94,3%	88,3%	84,3%	77,3%	54,0%	75,2%	78,6%	64,3%	57,3%	64,9%	60,4%
■ Skandinavien	83,5%	83,8%	80,1%	76,4%	80,8%	77,3%	64,1%	69,2%	63,2%	65,1%	74,6%	79,6%	76,5%
■ National	81,0%	85,1%	79,9%	76,2%	73,5%	79,0%	75,7%	78,3%	61,8%	72,6%	74,5%	69,4%	69,7%

(Source: Kombiverkehr)

Punctuality = tolerance of 30 minutes

Publicly available data = what railways authorise for publishing

UIRR QMS: BRENNER INCUMBENT H2.2009-H1.2010

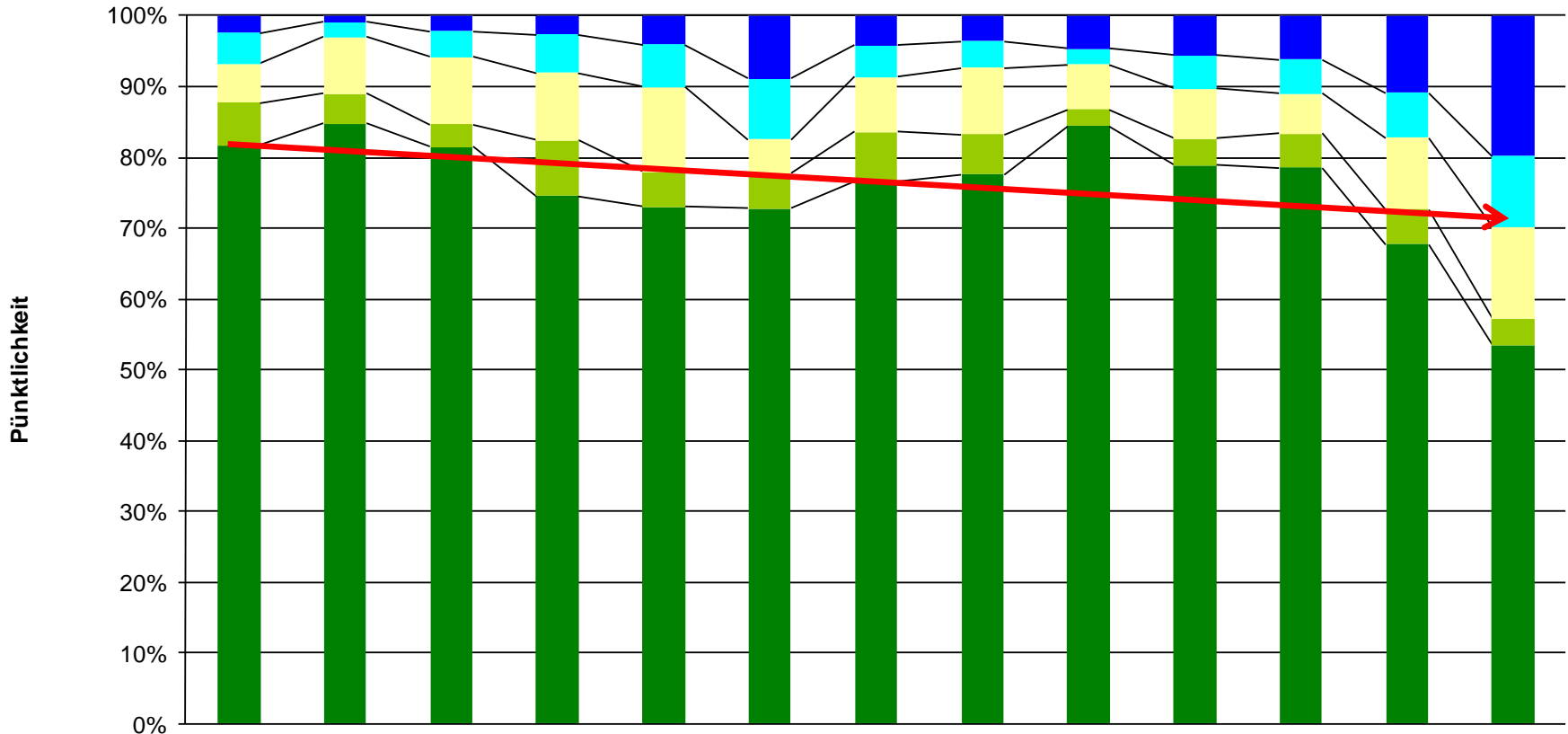


	jul.-09	août-09	sept.-09	oct.-09	nov.-09	déc.-09	janv.-10	févr.-10	mars-10	avr.-10	mai-10	juin-10	jul.-10
> 24 Stunden	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
> 360 Minuten	6,2%	3,3%	4,3%	3,0%	2,2%	9,7%	8,7%	4,3%	5,4%	4,9%	4,7%	8,5%	27,2%
> 180 Minuten	7,9%	2,8%	3,2%	2,7%	2,5%	8,6%	8,7%	3,7%	3,9%	3,7%	6,4%	6,4%	12,1%
> 60 Minuten	9,0%	8,1%	4,9%	4,9%	11,3%	12,6%	11,8%	7,5%	10,1%	10,4%	5,3%	14,7%	10,4%
> 30 Minuten	5,1%	3,3%	5,8%	4,9%	5,2%	6,3%	6,2%	5,8%	6,2%	4,9%	7,5%	6,7%	6,4%
pünktlich	71,9%	82,5%	81,7%	84,3%	78,8%	62,8%	64,7%	78,7%	74,4%	76,1%	76,1%	63,8%	44,0%

(Source: Kombiverkehr)

Publicly available data = what railways authorise for publishing

UIRR QMS: BRENNER PRIVATE H2.2009-H1.2010



	juil.-09	août-09	sept.-09	oct.-09	nov.-09	déc.-09	janv.-10	févr.-10	mars-10	avr.-10	mai-10	juin-10	juil.-10
> 24 Stunden	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
> 360 Minuten	2,5%	0,8%	2,2%	2,6%	4,1%	8,9%	4,2%	3,5%	4,6%	5,5%	6,2%	10,9%	19,8%
> 180 Minuten	4,4%	2,1%	3,6%	5,5%	6,0%	8,6%	4,4%	3,8%	2,2%	4,8%	4,8%	6,3%	10,0%
> 60 Minuten	5,4%	8,0%	9,5%	9,5%	12,0%	4,9%	7,8%	9,4%	6,4%	7,1%	5,6%	10,2%	12,9%
> 30 Minuten	6,0%	4,2%	3,1%	7,9%	5,0%	4,9%	7,0%	5,7%	2,4%	3,8%	4,8%	4,9%	3,8%
pünktlich	81,7%	84,8%	81,5%	74,5%	73,0%	72,8%	76,6%	77,6%	84,4%	78,8%	78,5%	67,7%	53,5%

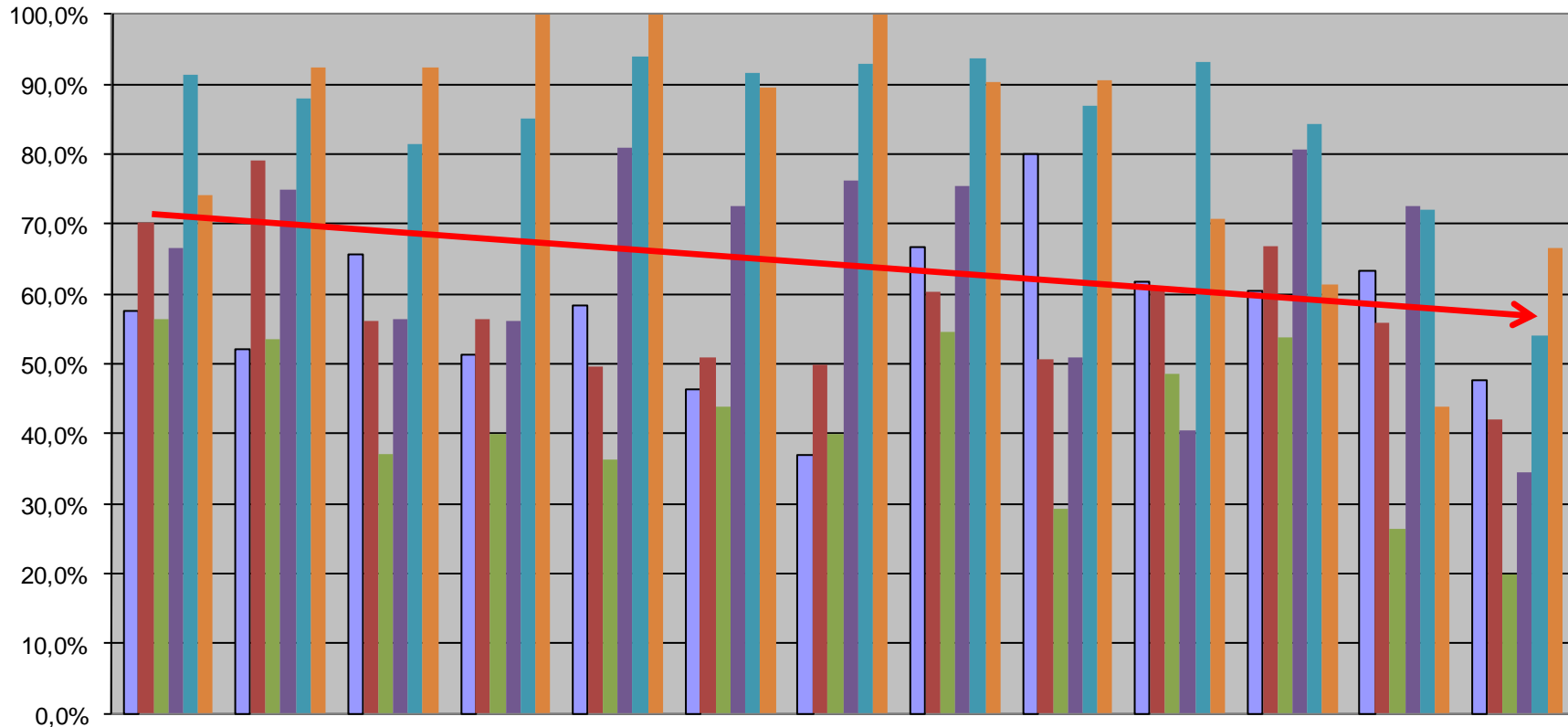
(Source: Kombiverkehr)

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UIRR QMS: EASTRN RELATIONS H2.2009-H1.2010



Pünktlichkeit



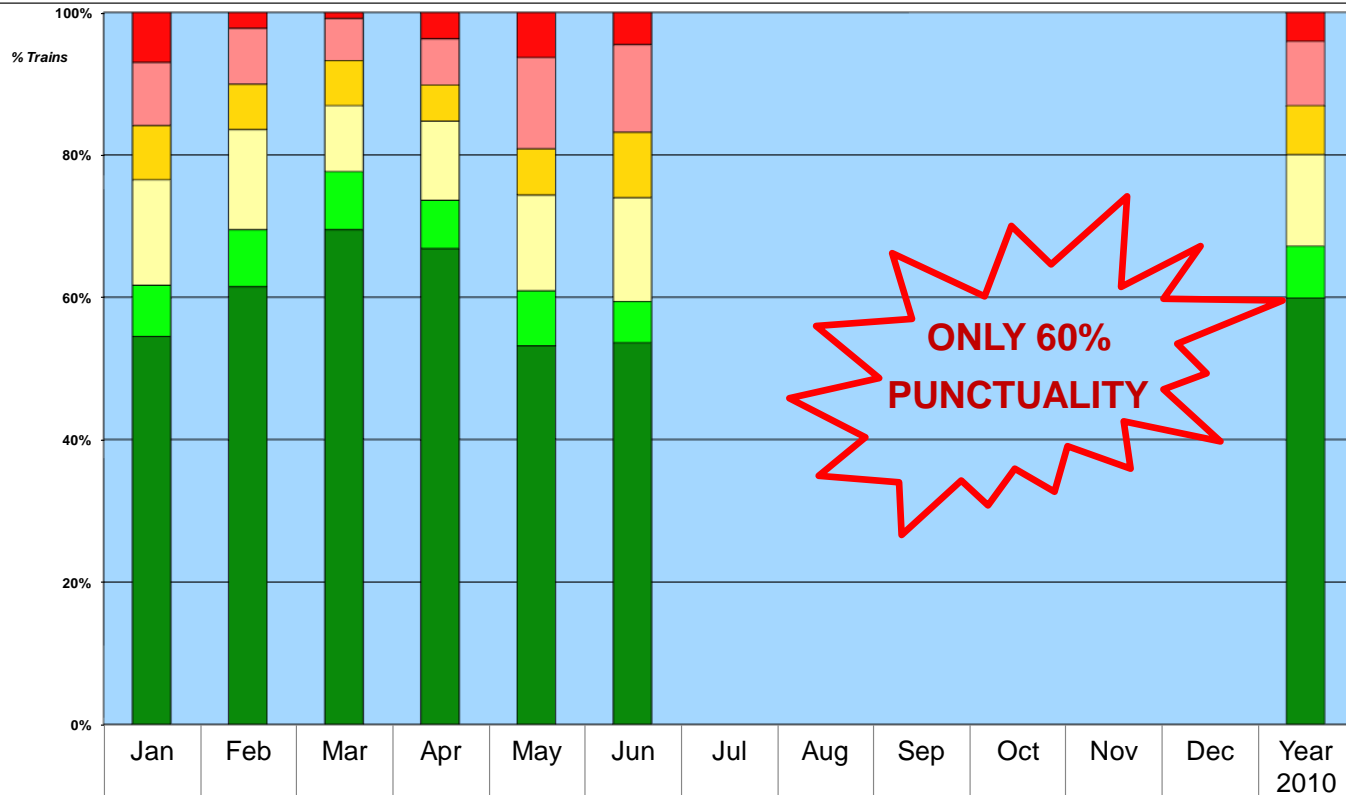
	juil.-09	août-09	sept.-09	oct.-09	nov.-09	déc.-09	janv.-10	févr.-10	mars-10	avr.-10	mai-10	juin-10	juil.-10
Ungarn	57,7%	52,2%	65,8%	51,4%	58,5%	46,4%	37,0%	66,7%	80,0%	61,9%	60,5%	63,4%	47,7%
Österreich	70,3%	79,2%	56,2%	56,5%	49,6%	50,9%	50,0%	60,3%	50,7%	61,2%	66,9%	55,8%	42,0%
Polen	56,4%	53,6%	37,0%	40,0%	36,4%	44,0%	40,0%	54,5%	29,2%	48,7%	53,8%	26,3%	19,8%
Niederlande	66,7%	75,0%	56,4%	56,1%	81,0%	72,6%	76,2%	75,5%	50,9%	40,6%	80,7%	72,6%	34,6%
Tschechien	91,3%	88,1%	81,6%	85,2%	93,9%	91,7%	92,9%	93,8%	87,0%	93,3%	84,4%	72,0%	54,2%
Slowenien	74,1%	92,3%	92,3%	100,0%	100,0%	89,5%	100,0%	90,3%	90,6%	70,8%	61,5%	43,8%	66,5%

(Source: Kombiverkehr)

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UIRR QMS: AGGREGATE FIGURES H1.2010



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year 2010
> 24 hours	46	15	6	24	41	32	0	0	0	0	0	0	4%
> 6 hours	58	53	42	42	83	87	0	0	0	0	0	0	9%
From 3 to 6 hours	50	43	45	33	42	65	0	0	0	0	0	0	7%
From 1 to 3 hours	97	95	66	72	87	103	0	0	0	0	0	0	13%
From 0,5 to 1 hour	47	54	58	44	50	41	0	0	0	0	0	0	7%
OK (< 0,5 hour)	357	415	494	433	344	379	0	0	0	0	0	0	60%

(Source: Kombiverkehr)

Corridors: D-I ; NL-I ; B-CH ; B-I

Upcoming political initiatives: **Promising for rail ?**



Infringement procedures on compliance with first railway package legislation

- Directive 2001/12/EC (development of the Community's railways),
- Directive 2001/13/EC (licensing of railway undertakings) and
- Directive 2001/14/EC (allocation of infrastructure and levying of charges).

Recast of first railway package (proposal unveiled on 19 September)

- Three directives into one

Revival of the **Eurovignette amendment** (Belgian EU Presidency)

Directive on establishing a **Single European Railway Area**

New EU White Book on Transport Policy (to be published in 2011)



Position on improving productivity and competitiveness

- European definition of **train categories and their hierarchy**.
- Responsibility of Member States clearly declared to **maintain the nominal technical (design) parameters of their rail infrastructure network**, and restoring these within reasonable time.
- The obligation to expand infrastructure capacity (within a reasonable period of time) in case of saturation of rail traffic should be moved from rail infrastructure managers to directly the Member States.
- Member States should be required to prepare, beyond their ERTMS convergence schedules, a **comprehensive rail interoperability plan** (within a reasonable time-span).
- **A detailed reporting regime should be required from rail infrastructure managers** whereby they would have to prepare regular (1-3 monthly) reports on a wide set of performance indicators (to be audited by the independent national rail regulators).



Position on the enforcement of European rules

- Legislation presently existing in a Directive form should be re-enacted as a European Regulation, which would leave considerably **reduced room for national interpretation of the European rules.**
- The **independence of rail regulatory bodies from the government** entities which exercise ownership rights and/or award public service and/or multi-annual rail infrastructure management contracts should be ensured in their budget approval, appointment of their leading staff, and professional oversight. (European railway watchdog)



The Commission's proposal of 8 August 2008

- Already overdue in 2008
- Inclusion of CO₂ emissions missing
- EP first reading vote vs Council position: congestion, accidents, earmarking
- IRU (ProgTrans Study) attacks CE Delft Internalisation Handbook and JRC Study
- Hopes: Belgian Presidency negotiates consensus in Council by the end of 2010

More political action needed

- New externality category: cost of oil dependence
- European-level agreement on transport taxation:
 - Fuel excise tax: to cover externalities related to the burning of oil-based fuels
 - Tax (VAT, excise tax) exemption of aviation (at least within Europe) cancelled
 - Ownership-related taxes (registration, trafficworthiness exams, etc) should be reduced to fees covering the costs of these government mandated services
- Distance-based (electronic) tolling on all roads for HGVs
- All non-oil related externalities internalised in the road tolls
- Systematic but temporary relief measures for rail until equalisation for road is implemented



EU projects

- Be-Logic: a logistics planning tool for small businesses
- IMCOSEC: security best practice for container transport-chains
- Marco Polo: SEEIS, Ro-Mo-Net
- Project supervisory function in several more projects

Industry-level activities with railway sector

- UIC/Diomis
- TAF TSI SEDP
- Technical matters: consolidation of loads, noise/braking

Intra-industry (road-rail Combined Transport) activities

- Dangerous goods group
 - Operations group
 - Technical group
 - CIS/CESAR system: a tracking & tracing solution
- } developing and disseminating best practice

2010: ANNIVERSARY YEAR OF 40 YEARS OF UIRR (1970-2010)

INTERNATIONAL UNION OF COMBINED ROAD-RAIL TRANSPORT COMPANIES



THANK YOU FOR YOUR ATTENTION!



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