



INTERNATIONAL UNION
FOR ROAD-RAIL
COMBINED TRANSPORT

MLSZKSZ Conference

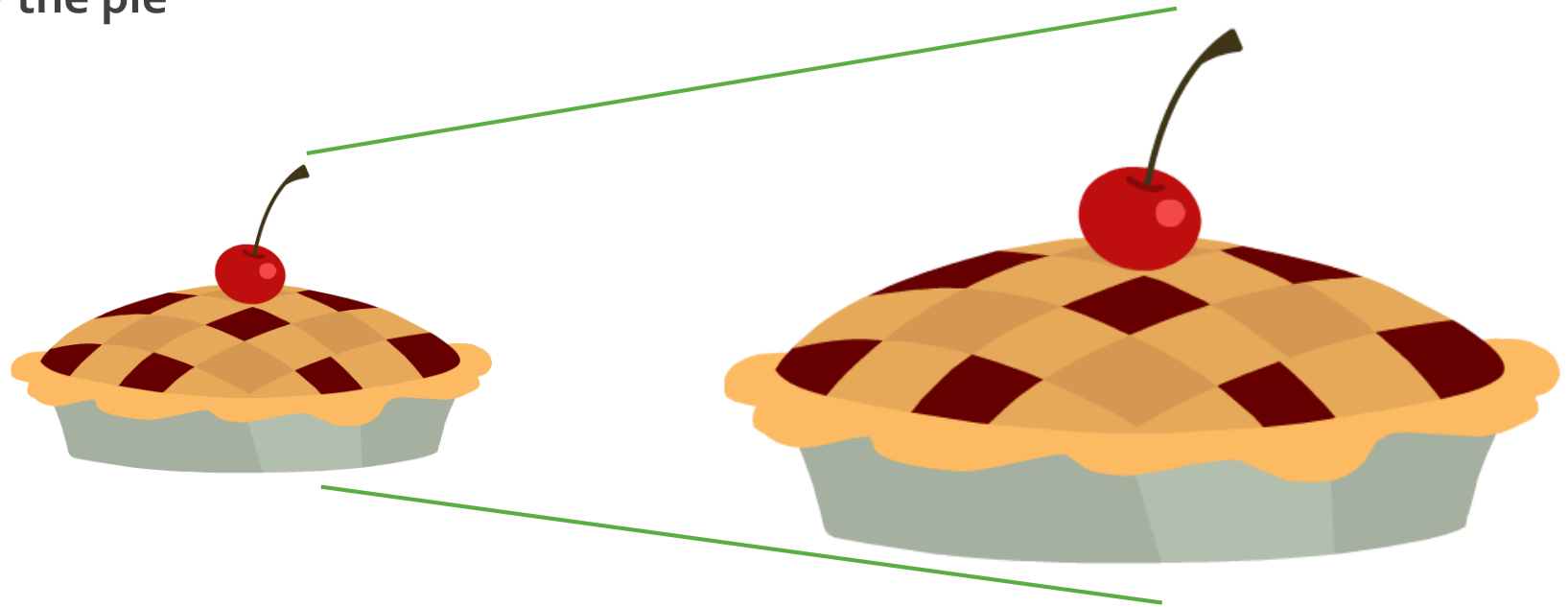
EUROPEAN TRENDS IN COMBINED TRANSPORT



Ralf-Charley SCHULTZE
President

HERCEGHALOM 25-26 January 2018

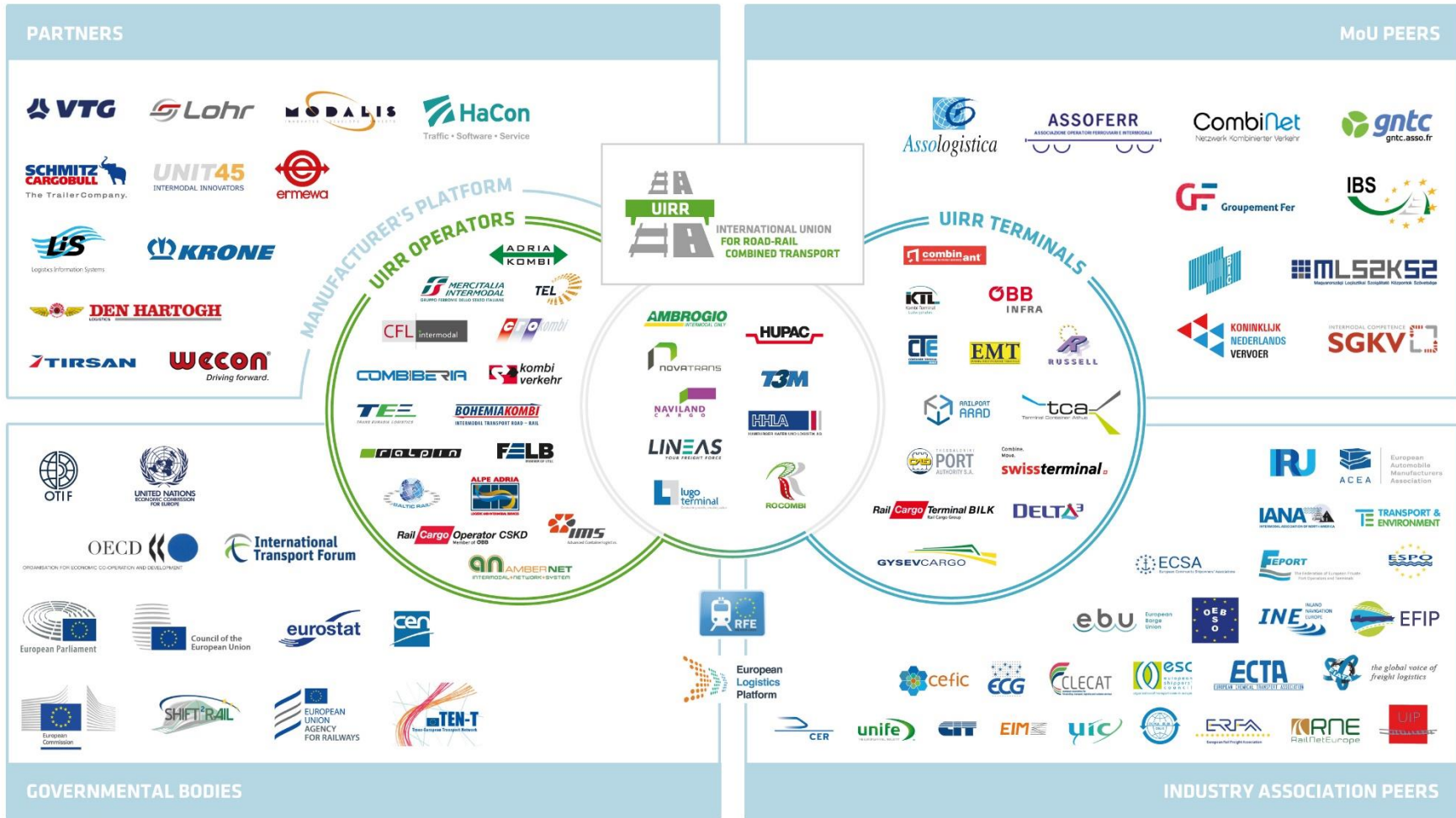
Grow the pie



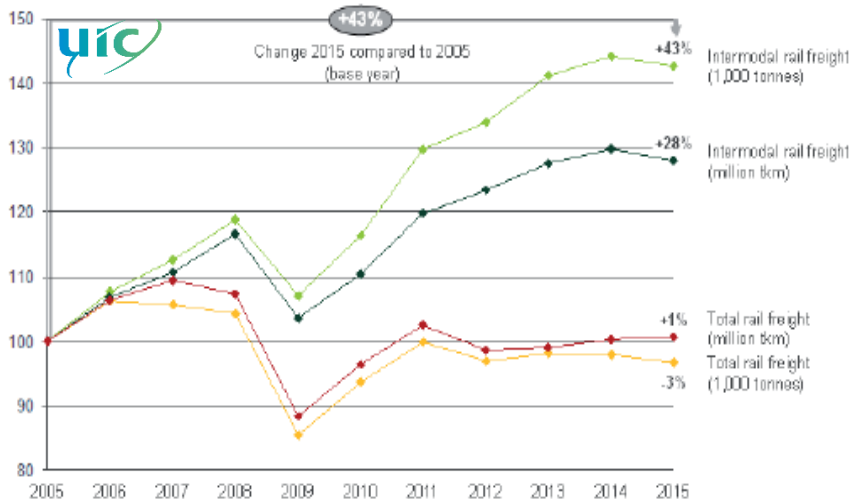
through enabling **competition and cooperation** on the basis of

- 1) technical merit – of the particular transport solution offered
- 2) competence (professionalism) of those who organize CT
- 3) with UIRR as the collective voice of the intermodal sector

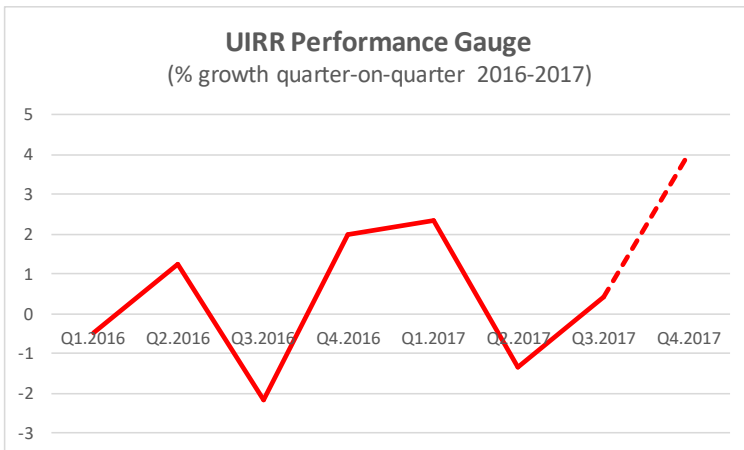
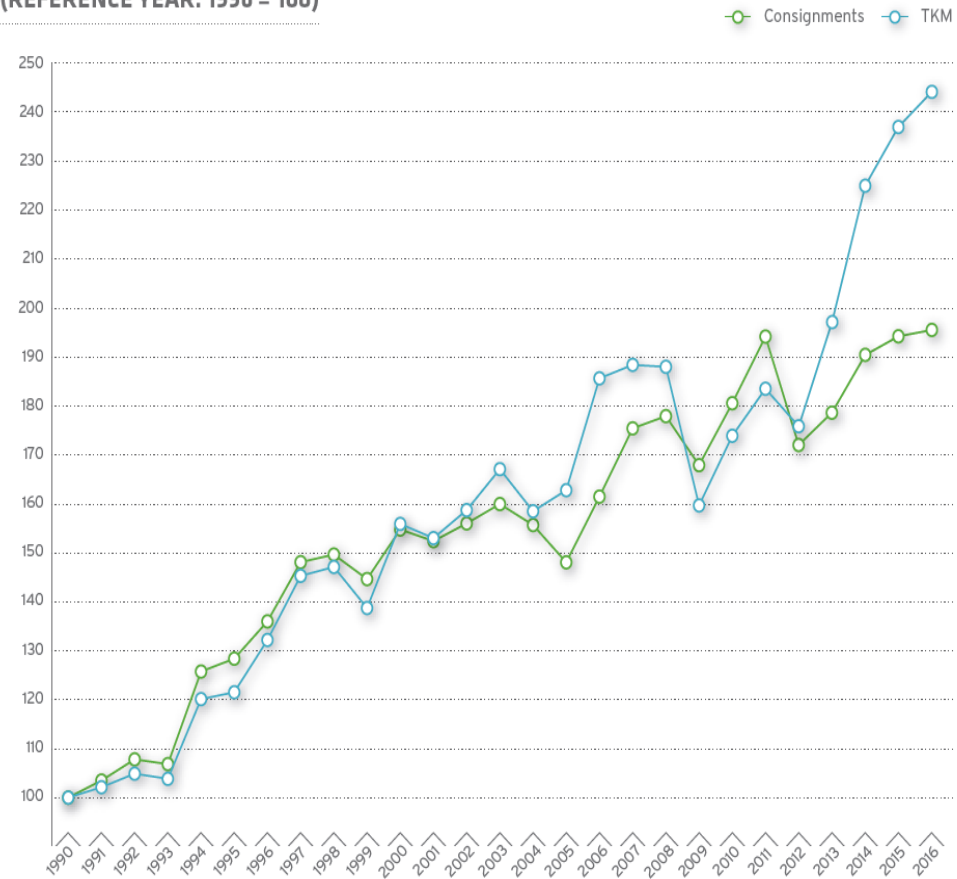
PROMOTE: UIRR's representativity in 2017

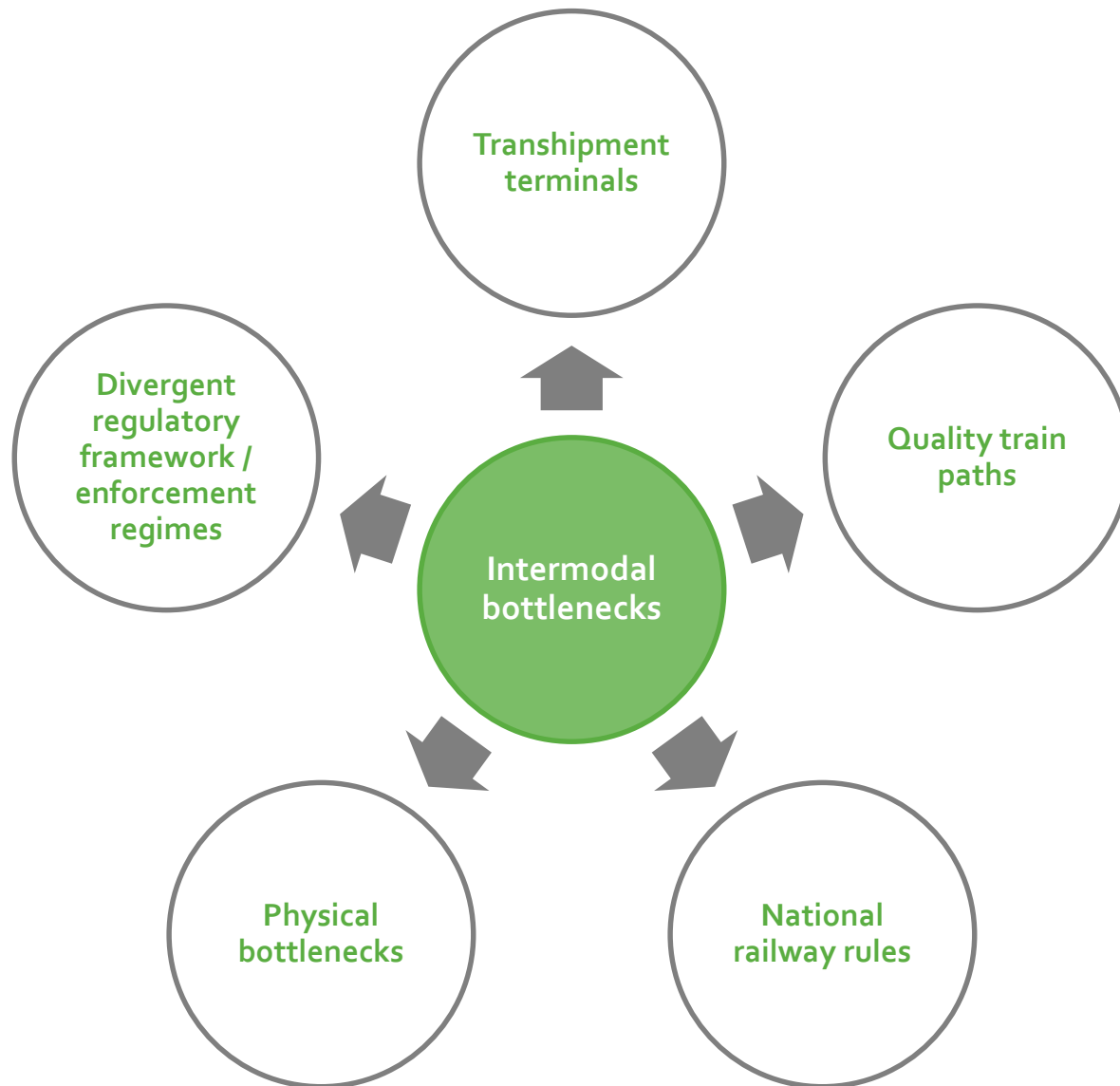


Development of Combined Transport



(REFERENCE YEAR: 1990 = 100)



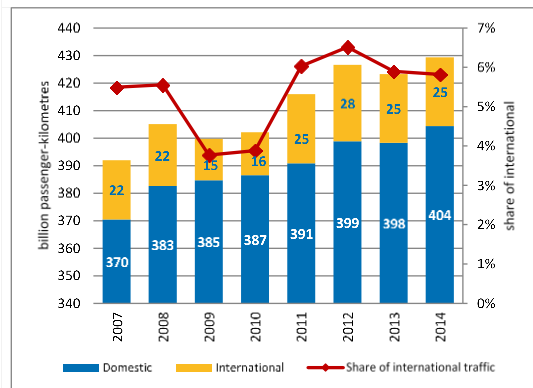


- **Uneven terminal density:**
good subsidy scheme > no CAPEX support
- **Lack of urban terminals:**
close to downtown to directly support city logistics
- **Quality/homogeneity:** upgrade to CNC parametres
- **Operational standards:** Implementing Act on Access to Service Facilities
- **'Not in my back 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

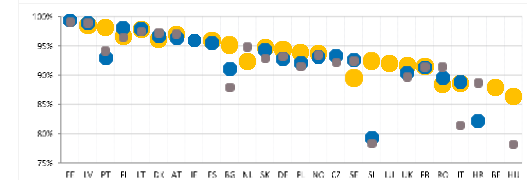
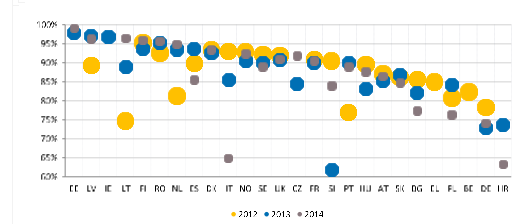
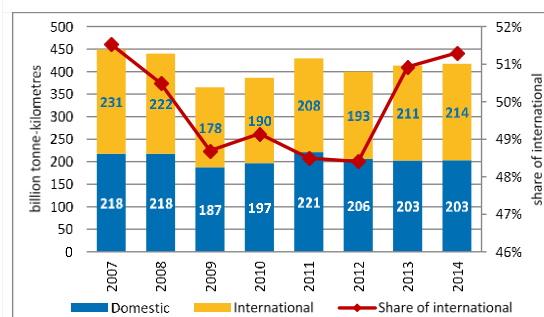


Figure 1 – Punctuality of long distance passenger services, percentage of services on time



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

Figure 1 – Evolution of rail freight traffic volumes



Source: RMMS

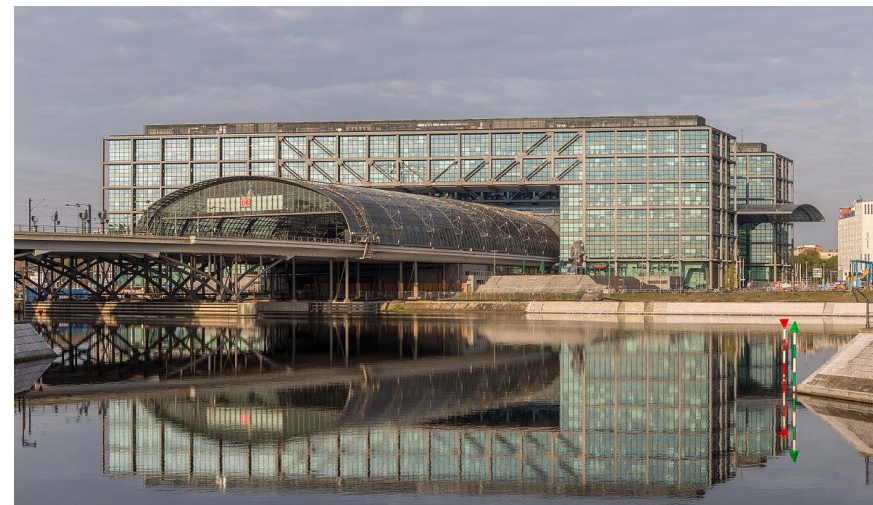
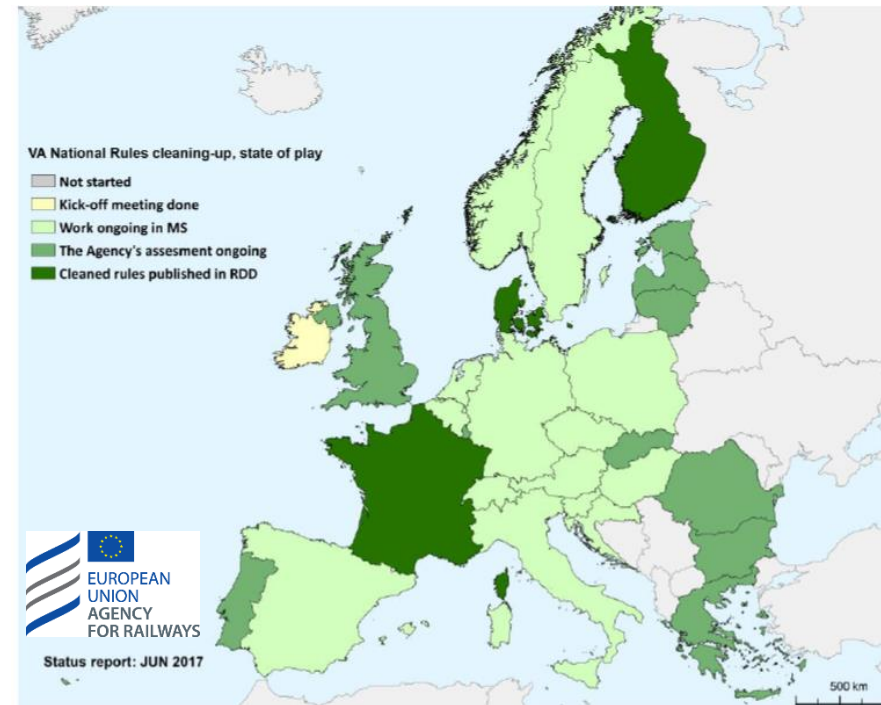


Rail freight quality:

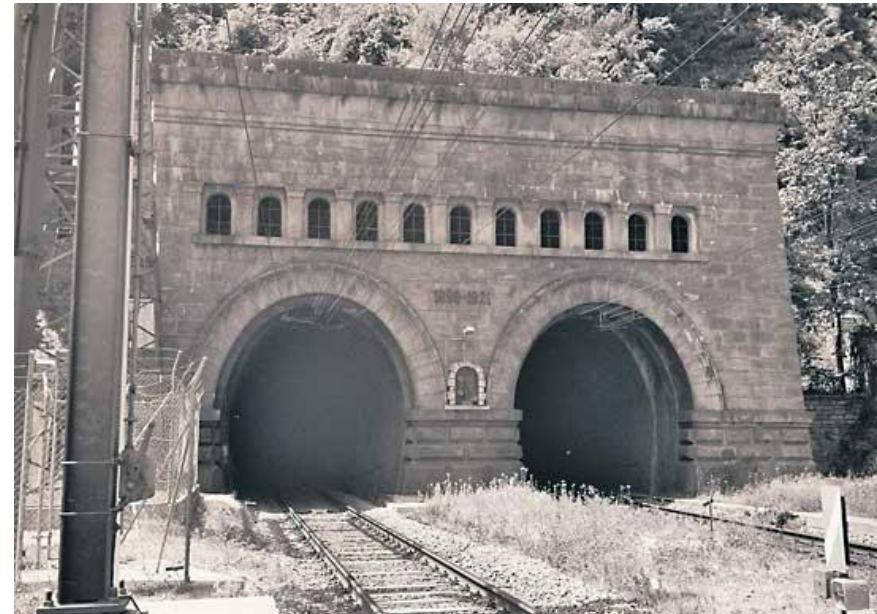
- The EU RMMS Report does not contain data
- Sector data collection (UIRR, RFCs) shows great variations with average est. below 50% (to 30 minute standard)



- **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



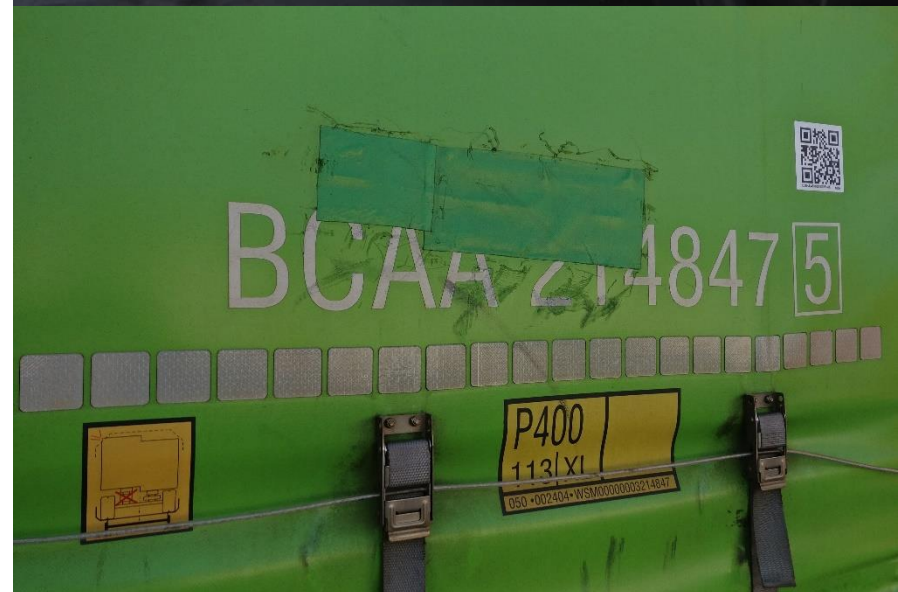
- **Symbolic infrastructure:** uneven progress – some big projects advance faster than others
- **Connecting lines:** uncoordinated upgrades of connecting lines to/from symbolic infrastructure like Gotthard Base Tunnel
- **TEN-T parameters:** inconsistent progress in train length, axle load and profile 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



- **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





National Intermodal Development Plans

alike German or UK rail freight masterplans

Assessment of Disparities

standard empirical method to analyse relative situation

Fair Competitive Framework

Horizontal Collaboration of Regulators

vis-à-vis vertically structured MoTs

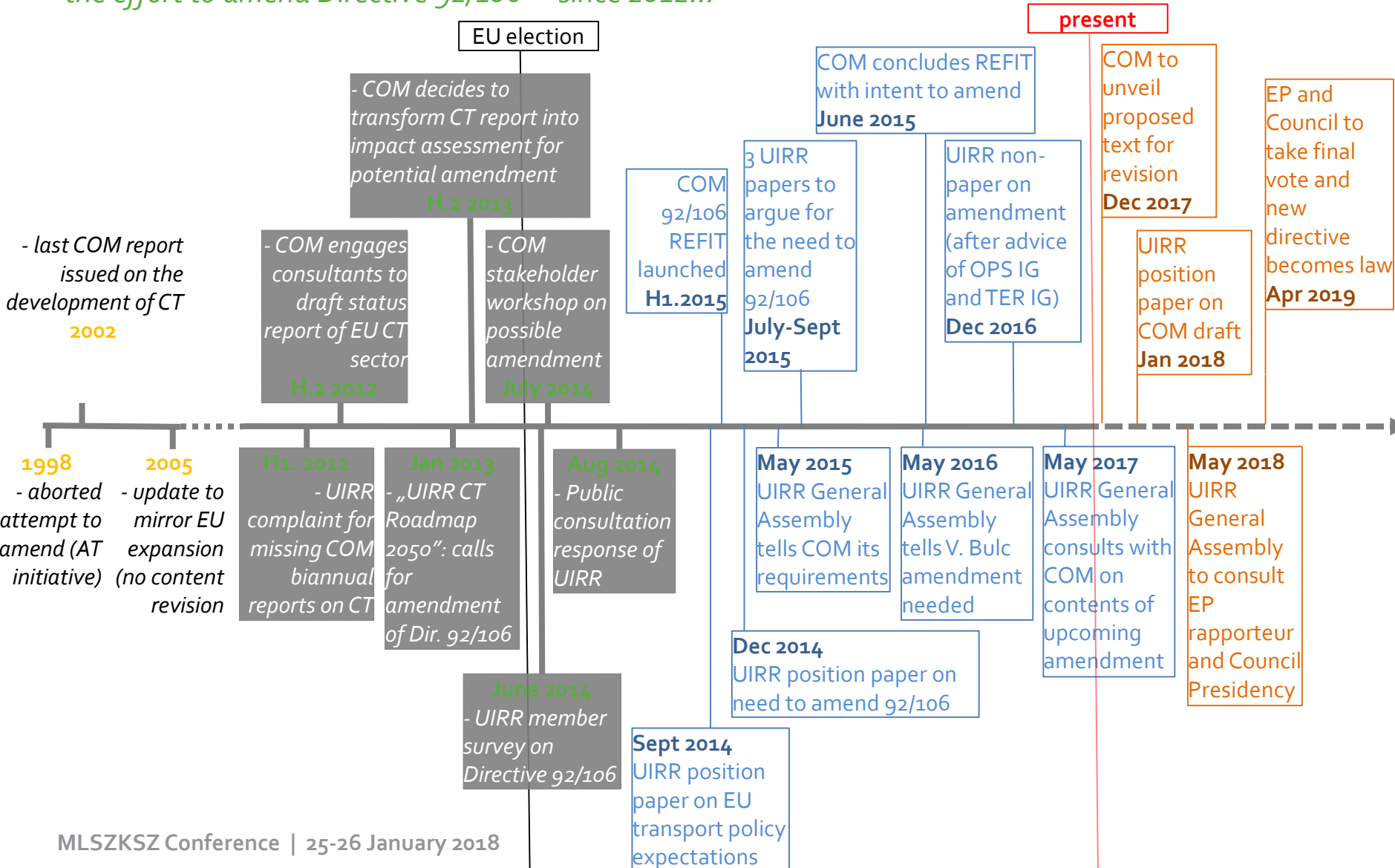
Temporary Compensatory Measures

to act as motivation for real structural reform

How long does it take to get to a legislative solution...



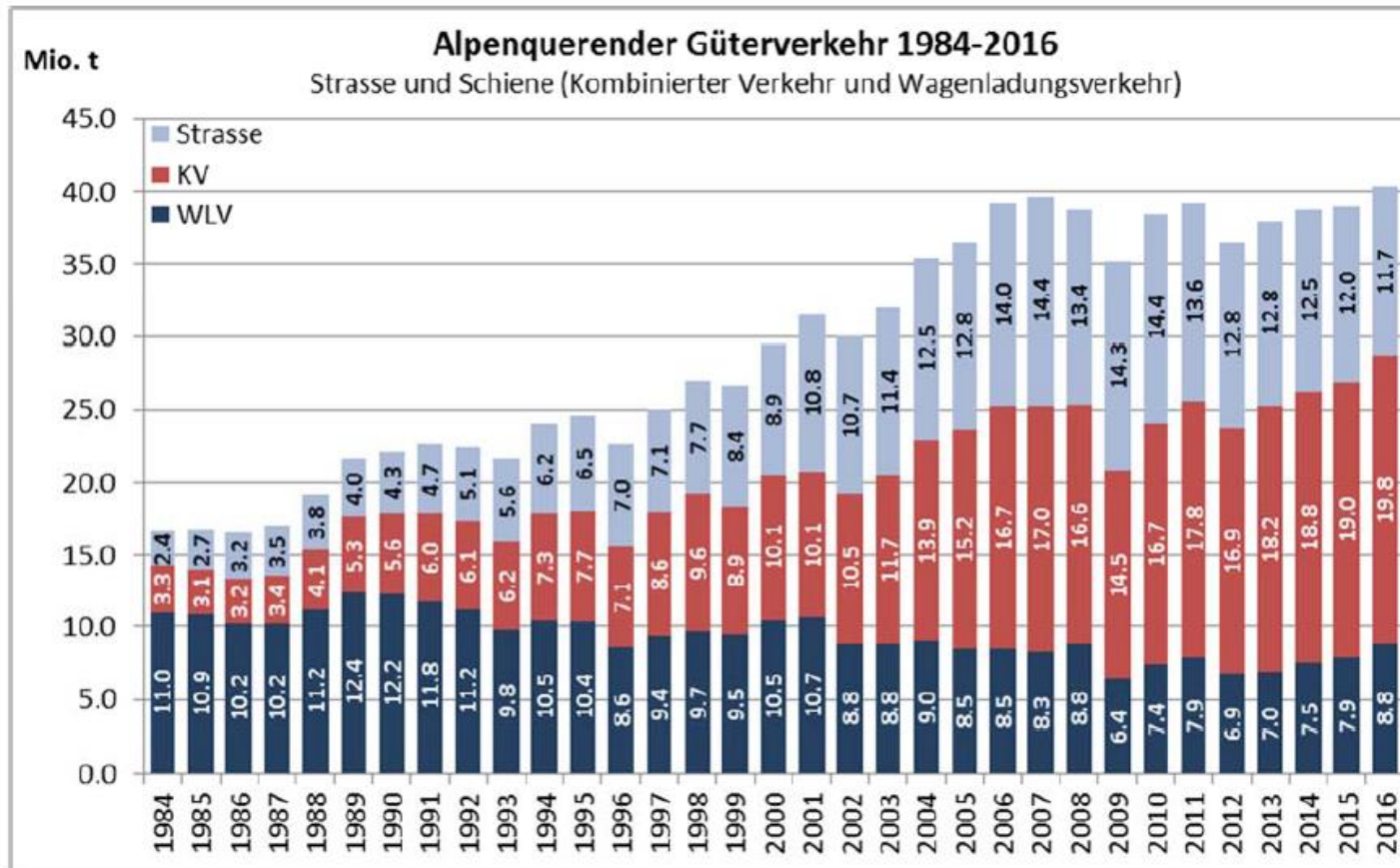
---the effort to amend Directive 92/106 - since 2012...



...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





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THANK YOU

For your attention

