



Union Internationale des Sociétés de Transport Combiné Rail-Route

*The contribution of Combined Transport to more
efficient and environment-friendly logistics*

UIRR's successful approach

Balkans Intermodal and Logistics Conference
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Brief reminders

1. The importance of transport
2. Recent trends in freight
(Europe - inland modes)
3. Expected developments



Brief reminders

1. 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)



Brief reminders

2. Recent trends in freight (EU - inland modes)

Traffic

	<i>Road</i>	<i>Rail</i>	<i>Inland Waterway</i>	<i>Pipelines</i>	<i>Total</i>	<i>UIRR (Combined Transport)</i>
1995	1248	358	120	105	1831	
2003	1575	364	120	123	2182	
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%

2004/2003	6,90%	+4,3%	+8,7%	+0,8%	+6,2%	+5%
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Modal split

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



Brief reminders

3. Expected developments

- Continued increase in traffic (close to 40% between 1998 and 2010)
 - Globalisation
 - Economic recovery
 - EU enlargement
- Growing awareness of the need for appropriate policies, to avoid:
- Aggravating pressure on the environment
 - Air and noise pollution
 - Congestion
 - Accidents



The contribution of Combined Transport (CT)

1. Its definition
2. Its overall advantages
3. Its basic techniques
4. Its figures (2004/2005)
5. Its anticipated growth



Combined Transport

1. Its definition

(Source: EU/CEMT/UNECE)

Combined Transport is an 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.



2. Its advantages

- relief of the road network
- transfer of goods to a safer and more environment-friendly transport mode, which in the case of rail is also more independent from climatic conditions
- 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 in given circumstances
- avoidance of directional road traffic imbalance (empty leg)

Positive impacts felt increasingly with distance and/or existence of administrative or geographical obstacles



Combined Transport

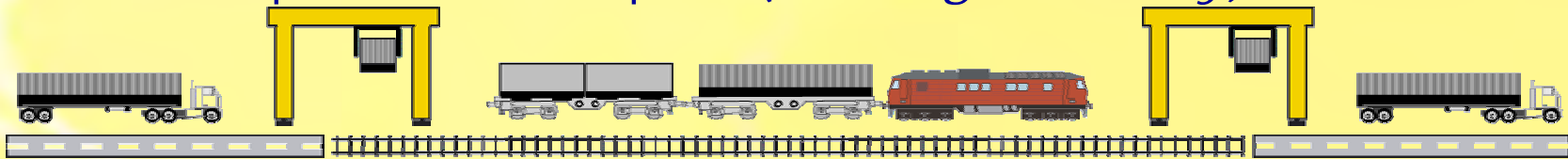
2. Its advantages

Environmental benefits of CT versus road

	<i>Reduction in CO₂ emission</i>	<i>Energy savings</i>
Unaccompanied CT □ sample of 18 axes	60%	29%
Accompanied CT □ sample of 2 axes □ Dresden-Lovosice	23% 20%	11% 9%

3. Its basic techniques

Unaccompanied Transport (*loading unit only*)



- Differences in:**
- road and rail distances
 - equipment / transshipment yards
 - type of wagons
 - profitability
 - traffic catchment area
 - type of clientele
 - advantages for customers

Accompanied Transport (*full truck with driver*)





Combined Transport

4. Its figures 2004/2005 (>80% of the market)

UIRR (Consignment = 2,3 TEU)

	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%

INTERCONTAINER

In 1000 TEU	International		
	2004	2005	% 05/04
Unaccompanied	702,8	516.7	-26,5%



5. Its anticipated growth

(Source: UIC/UIRR Capacity reserves study)

Market segment	TEU (mill)		Net tonnage (mill tonnes)		
	2002	2015	2002	2015	2015/2002
Unaccompanied	3.48	8.7	44.1	103.6	+ 135 %
Accompanied	1.26	1.5	10.4	12.4	+ 19 %
Total	4.74	10.2	54.5	116.0	+ 113 %



The contribution of UIRR scri

1. Aim of the International Union
2. Structure
3. Liaison Office
4. Member companies
5. Geographical location
6. Achievements
7. Central and South East Europe



1. Aim of the International Union

Exclusively:
Development of mainly
Road-Rail Combined
Transport (CT)





2. Structure

Founded October 1970 – Munich

**Professional Union functioning at
two parallel interactive levels (decentralised structure)**



LIAISON OFFICE BRUSSELS

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

MEMBER COMPANIES

- = organising and marketing of CT

Board of Directors
Working groups



3. Liaison Office

ACTIVITIES



EXTERNAL

= overall promotion of CT

= interlocutor of:

- political Authorities
(EU Commission, EP, UNECE, CEMT,...)
- professional organisations
(UIC, CER, ERFA, IRU, EIM, FIATA/CLECAT)

= publications, communications

= PR events

INTERNAL

= administration

= coordination of members' activities
(codes, systems,...)

= project coordination (Marco Polo, R&D prg)

= representation in techn. bodies (ERA, CIS)

Position papers

Support documents (legal, security, dangerous goods)



4. Member companies (1)

- Types
 - Full members (20)
 - Associated (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



4. 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

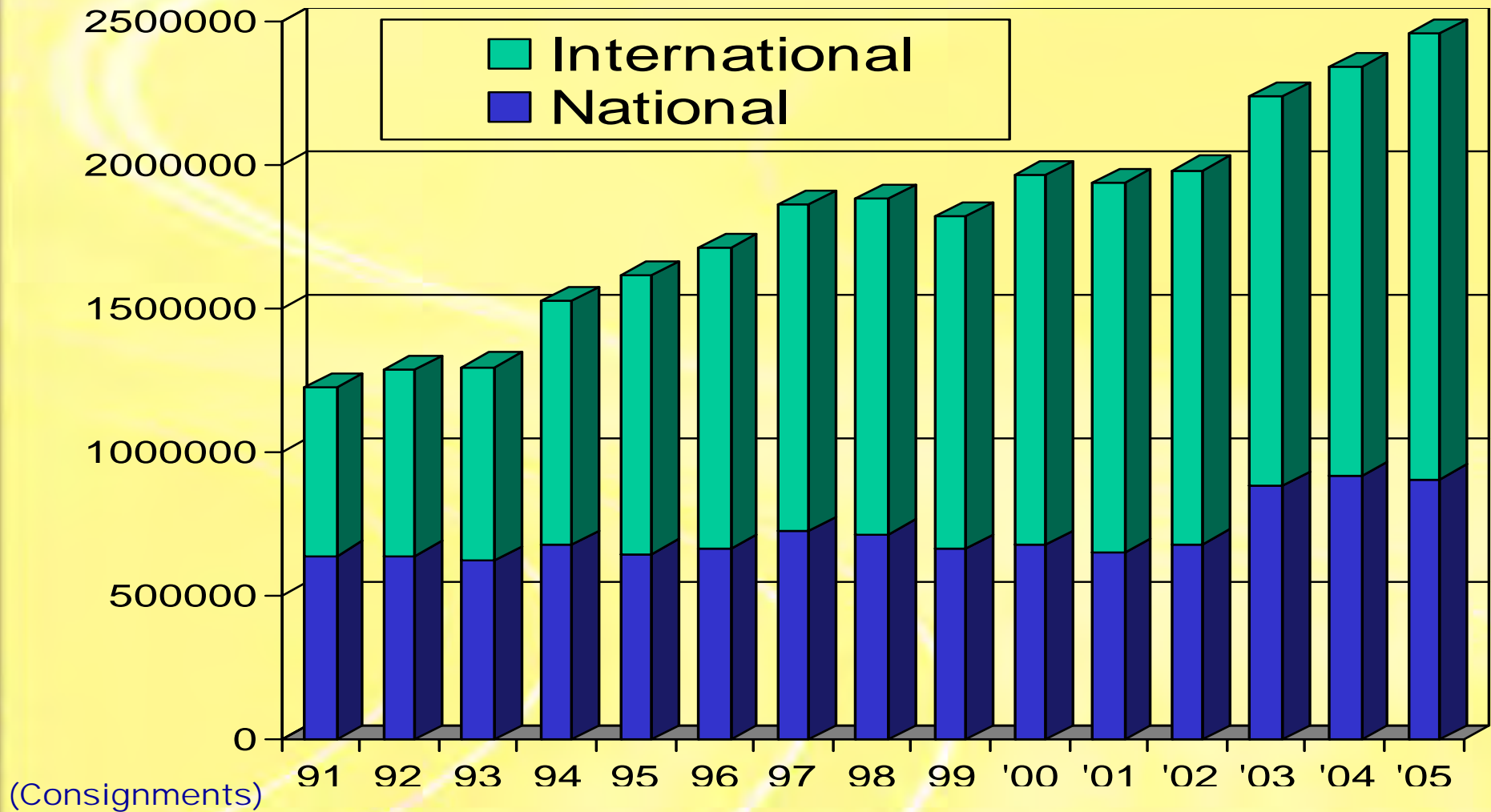


5. Geographical location





6. Achievements (1 of 2)





6. Achievements (2 of 2)

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



7. 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 contribution of the Railway Undertakings

- Competitive prices
- Reliable services
- Willingness to cooperate with neutral interfaces



The contribution of the Authorities

Conditions for sustained CT growth

- Appropriate and similar to road interoperable rail infrastructure (ERA) => CT terminals
- Fair chances for rail freight of access to the market:
 - Liberalisation (competition)
 - Cost allocation
 - Stable regulatory provisions (weights/dimensions)

Framework conditions



The opportunities for Bulgaria

- Accession to the EU
- TEN-T (in partic. Rail corridor X)
- SINGER project (Marco Polo – UIRR)
 - = Ljubljana rail gateway between West and East Europe
- Bulkombi: restarting of this CT operator