



An afternoon with Combined Transport:

The strategic potential and vision of European CT Operators

*Ákos Érsek, Strategy & Communications Advisor
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Figures that speak for themselves



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

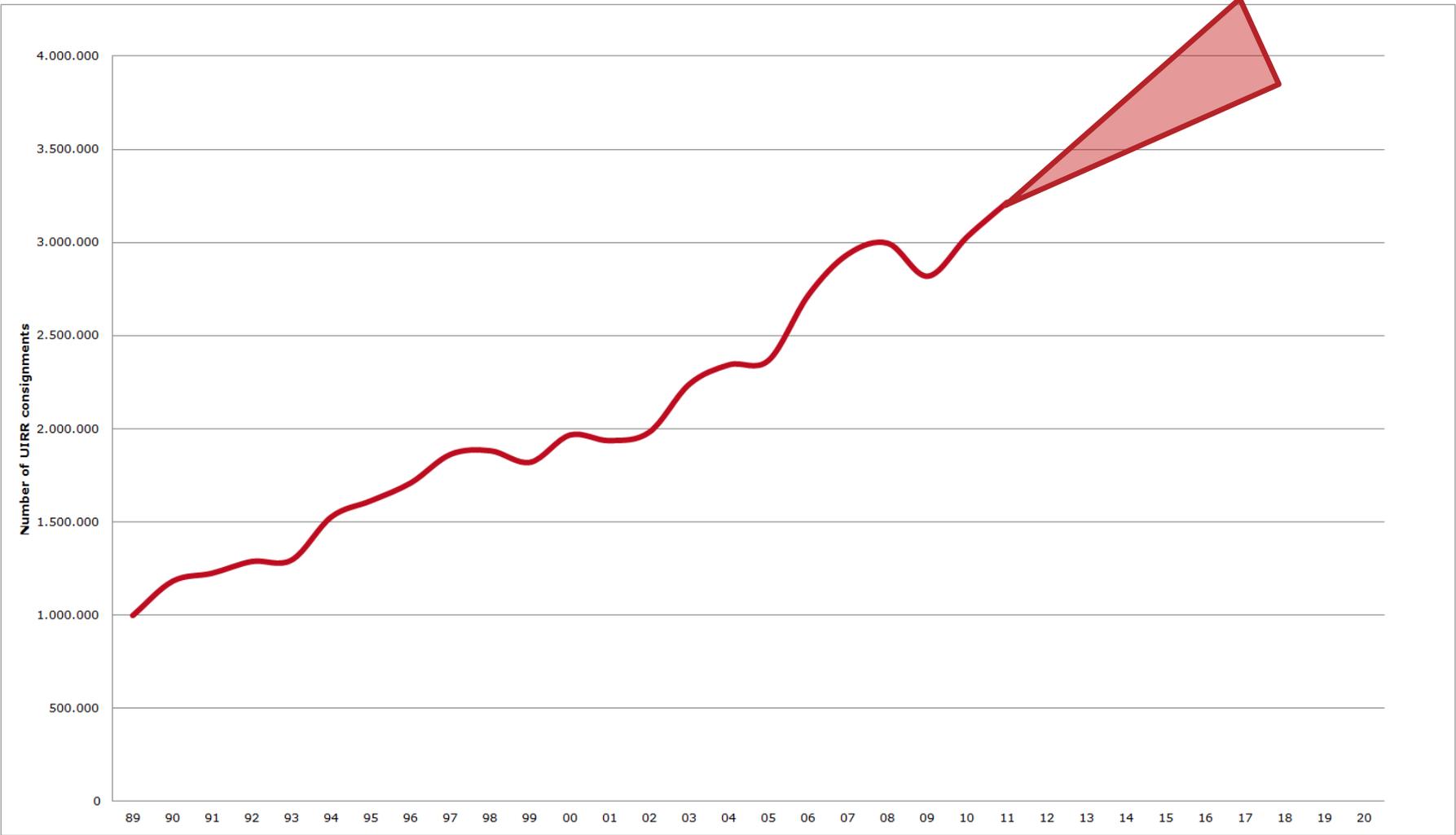
75% fewer proportional GHG emissions and 30% less energy needed

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

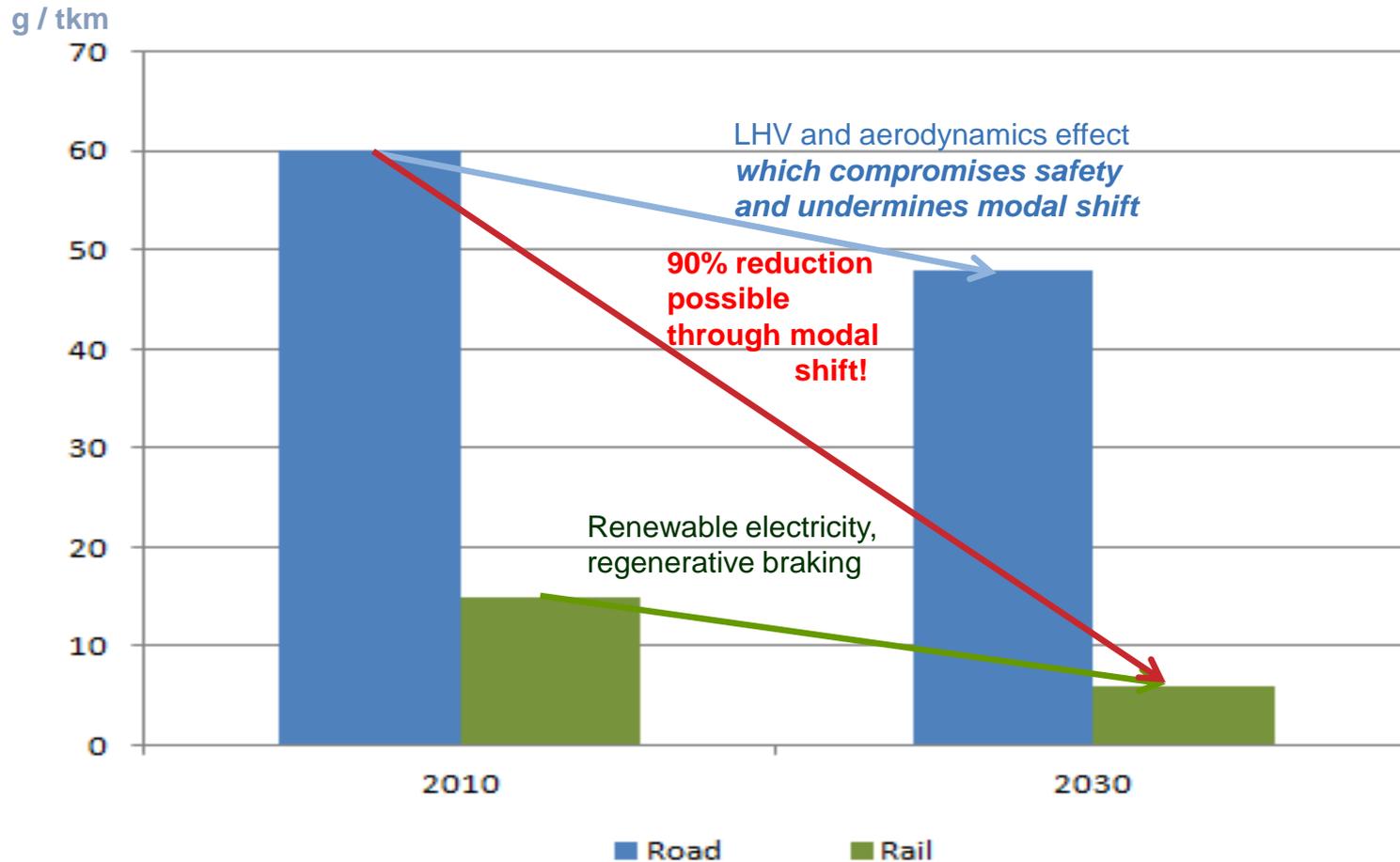
40-times fewer accidents

- In comparison with road transport

Combined Transport: Performance and outlook



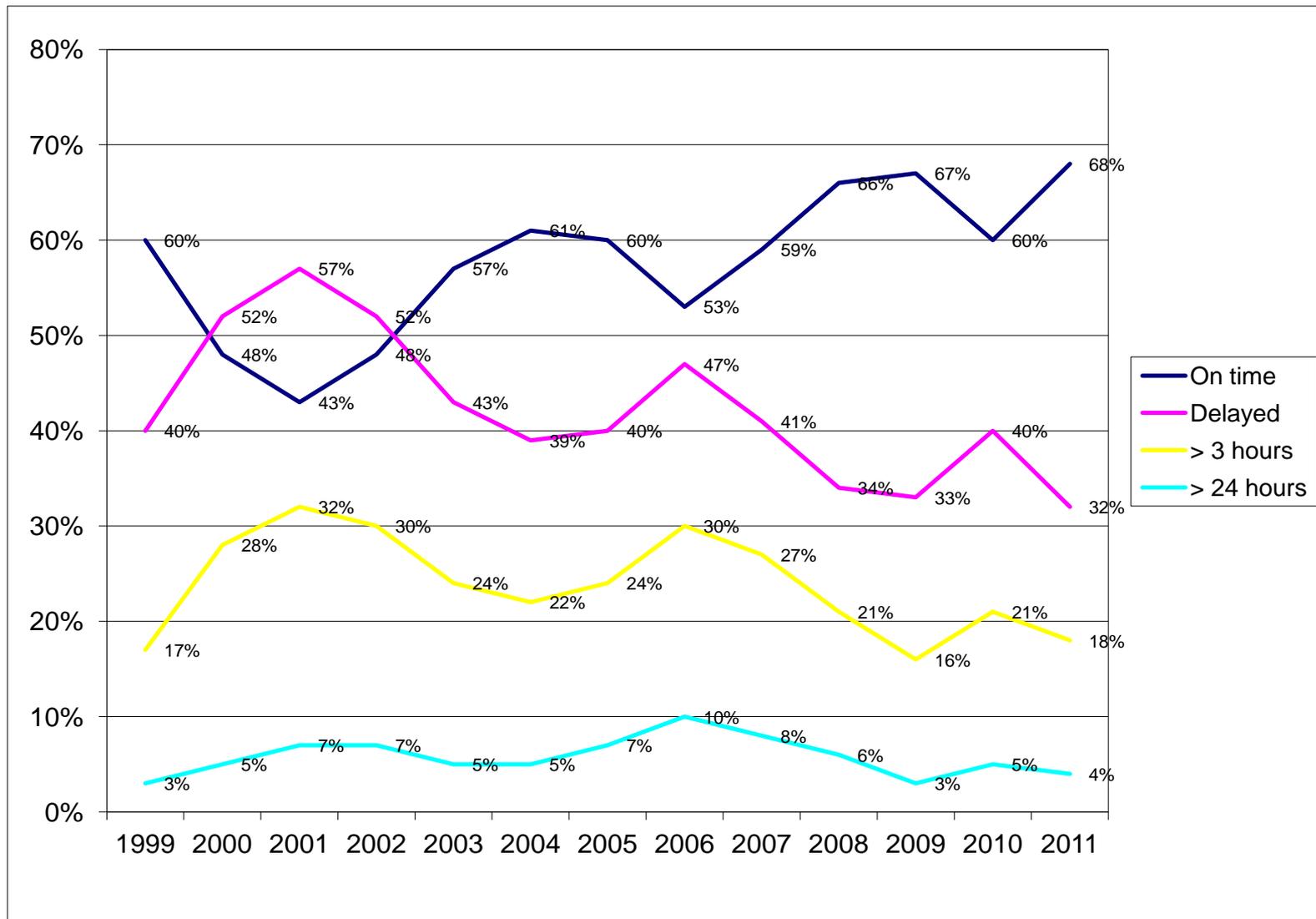
CO₂ emission performance of road and rail transport



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



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

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

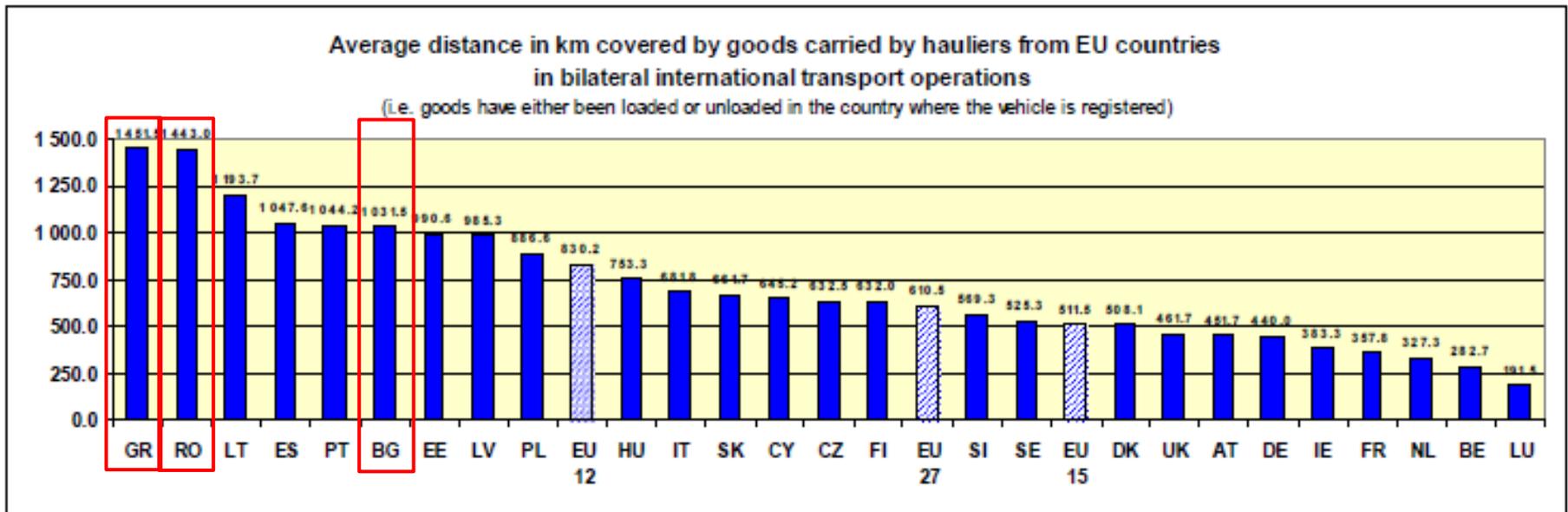


20% - 30% - 80% of European CO2 emissions must be saved by 2020-2030-2050:

- 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

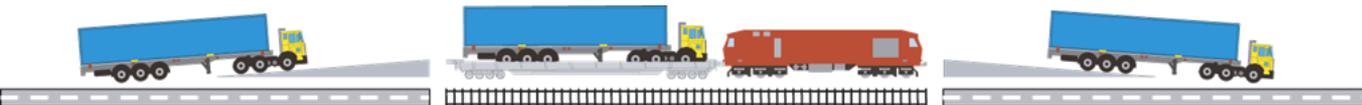
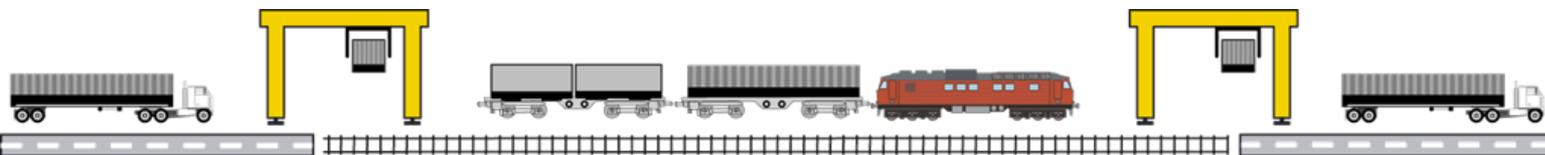
- Major freight traffic generating sites (manufacturing plants, distribution centres, etc.) should be made **accessible directly by rail**, and/or **density of CT terminals increased**.

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

THANK YOU FOR YOUR ATTENTION



Administrator of the ILU -Code



Ákos Érsek - UIRR scri
aersek@uirr.com
+32 2 548 78 91