Road-Rail Combined Transport: new developments and best practices

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Director General
### Combined Transport: UIRR figures 2011

#### 2011 Summary
- Overall increase of 6% with 2008 levels nearly reached in TKM / exceed in UIRR consignments
- Unaccompanied: +8% (reinforcement of the core network, maritime gateways and expansion to the East)
- Accompanied: -5% (positive results on all border-crossing lines – important decrease on domestic lines)

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
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<th>% 11-10</th>
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<th>2011</th>
<th>% 11-10</th>
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</thead>
<tbody>
<tr>
<td><strong>Unaccompanied</strong></td>
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<tr>
<td>Consignments</td>
<td>1,509,152</td>
<td>1,655,651</td>
<td>10%</td>
<td>1,073,461</td>
<td>1,132,193</td>
<td>5%</td>
<td>2,582,613</td>
<td>2,787,844</td>
<td>8%</td>
</tr>
<tr>
<td>TEU</td>
<td>3,018,303</td>
<td>3,311,302</td>
<td>10%</td>
<td>2,146,922</td>
<td>2,264,386</td>
<td>5%</td>
<td>5,165,225</td>
<td>5,575,688</td>
<td>8%</td>
</tr>
<tr>
<td>mln TKM</td>
<td>29,892</td>
<td>32,458</td>
<td>9%</td>
<td>8,337</td>
<td>8,036</td>
<td>-4%</td>
<td>38,229</td>
<td>40,494</td>
<td>6%</td>
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<tr>
<td><strong>Accompanied</strong></td>
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<tr>
<td>Consignments</td>
<td>250,663</td>
<td>277,170</td>
<td>11%</td>
<td>197,589</td>
<td>149,153</td>
<td>-25%</td>
<td>448,252</td>
<td>426,323</td>
<td>-5%</td>
</tr>
<tr>
<td>TEU</td>
<td>501,326</td>
<td>554,340</td>
<td>11%</td>
<td>395,178</td>
<td>298,306</td>
<td>-25%</td>
<td>896,504</td>
<td>852,646</td>
<td>-5%</td>
</tr>
<tr>
<td>mln TKM</td>
<td>3,346</td>
<td>3,623</td>
<td>8%</td>
<td>792</td>
<td>594</td>
<td>-25%</td>
<td>4,138</td>
<td>4,217</td>
<td>2%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
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<tr>
<td>Consignments</td>
<td>1,759,815</td>
<td>1,932,821</td>
<td>10%</td>
<td>1,271,050</td>
<td>1,281,346</td>
<td>1%</td>
<td>3,030,865</td>
<td>3,214,167</td>
<td>6%</td>
</tr>
<tr>
<td>TEU</td>
<td>3,519,629</td>
<td>3,865,642</td>
<td>10%</td>
<td>2,542,100</td>
<td>2,562,692</td>
<td>1%</td>
<td>6,061,729</td>
<td>6,428,334</td>
<td>6%</td>
</tr>
<tr>
<td>mln TKM</td>
<td>33,238</td>
<td>36,081</td>
<td>9%</td>
<td>9,129</td>
<td>8,630</td>
<td>-5%</td>
<td>42,367</td>
<td>44,711</td>
<td>6%</td>
</tr>
</tbody>
</table>

Remark: include only the rail section of the Combined Transport (terminal-to-terminal)
Combined Transport: importance of cross-border traffic

**TOTAL TRAFFIC PERFORMANCE (relative share per segment in % tonnes and in % tkm)**

- **TONNES**
  - Domestic: 64%
  - Border crossing: 36%

- **TKM**
  - Domestic: 81%
  - Border crossing: 19%

**2011 Summary**
- 81% of the overall performance in TKM are achieved with border-crossing relations
- Average Distances: 630 km (all) – 900 km (border crossing)
- 94% of CT traffic over distances of 300 km
- UIRR companies: about 50% of all border-crossing CT volumes in Europe
2011 Summary

- Mainly North-South relations
- 100 relations in total
- 2/3 transalpine corridors (Brenner-Gotthard)
  - Better framework conditions
  - More competition
  - Improvement of the railway infrastructure

A UIRR consignment corresponds to the transport capacity of one lorry on the road (equivalent to 2.3 TEU).

From 1 million to 3.2 million consignments in 20 years.

Average growth of 7% mainly cross-border traffic.

2011 summary: **UIRR operators recovered their pre-crisis peak.**
Outlook and corresponding markets (road and rail)

Road (million TKM)

Combined Transport

Rail (million TKM)

Q1 /Q2/Q3 - 2012

Q4/2012 - 2013

- Historical evolution of punctuality

Since 2004
Without Brenner/Austria

Since 2009
Without Brenner/Austria, F-I, Eastern countries
10 years of quality train monitoring with consolidated statistics

- 2011 punctuality rates just above the levels of 1999 but still unsatisfactory
- Percentage of trains delayed by over 3 and 24 hours is higher than the levels of 1999 despite
  - the creation of quality working groups on the main CT corridors
  - numerous sector initiatives and projects towards a better quality of services
- Reasons for delays are not transmitted anymore (since 2005).
- Data for several routes are not transmitted any more.

Quality Contracts

- Contractually the tolerances for punctuality are 60 minutes instead of 30mn
- A lot of delay reasons are excluded (inevitable events, exceptional circumstances, strikes and measures of IMs, …)
- ‘Threshold’ rule: rebates only apply if punctuality rates are less than xx%
- Rebates for delays are rather small
Creating a European Railway Market

Combined Transport is a competitor to long distance road haulage. An efficient and technically harmonised European rail system is the most important prerequisite for modal-shift to rail. Hundreds of logistics companies are shareholders of UIRR companies, thousands are already CT-customers.

**Logistics companies will shift more traffic to rail if its efficiency and service quality rises.**

**The solution**
- Completion of rail market opening and its implementation
- Technical harmonisation to ensure genuine interoperability
- Investment in railway lines and terminals (productivity: longer and heavier trains, removal of bottlenecks, GC loading gauge, etc.)
- Fair and equal conditions for every rail actor, incumbent and newcomer
2011 Transport White Paper objectives

- Aim of shifting 30% of long-distance (=“longer than 30km”) road tonne-kilometres to rail by 2030 and 50% by 2050
- Reducing the oil dependency of our economies through modal shift
- Significant reduction of GHG emissions of transport

Fulfilling the European Commission’s vision would require the tripling of rail freight’s prevailing market by 2050. But in 40 years a lot is possible. If we look back 40 years: Containerisation just began in maritime transport. UIRR was founded 1970 and Combined Transport rail road began to develop. Today it represents 1/3 of rail freight in tkm.

One example in the centre of Europe is already showing today that such a high share of rail is not an illusion, if investments are made and framework conditions are set accordingly the objectives.
CT and Rail Best Practice: Transalpine Traffic

Summary

- Rail freight (mainly CT) assumes a substantial market share in transalpine traffic already today
- The absolute market share of CT (rail freight) depends mainly on the framework conditions
- In Switzerland nearly 2½-times as high as in Austria and France with a share of 2/3 rail.
Operators do their part: Investment in new wagons

Small wheels for transport of high volume mega-trailers

Pocket wagon for Mega-Trailers: Very low pocket platform: 270 mm above top of rail

in order to be able to transport 4 m high semi-trailers
Other activities: standardisation

Standardisation is a great way to enhance the efficiency by a commonly agreed, homogeneous best practice. This is particularly true in intermodal transport which involves numerous actors.

- Standards can only deliver their beneficial effects if they are applied and become a part of daily best practice.

- The DESTINY project proposes to facilitate the deployment of existing standards related to:
  - EN13044-1 Identification of intermodal loading units (ILU-Code)
  - EN 13044 2+3 Codification of swap-bodies and semi-trailers
  - Safety - Cargo Securing
  - Dangerous Goods
Application of standards

Dissemination and training

**TOPIC 1**
Marking and identification of intermodal loading units

**TOPIC 2**
Codification of intermodal loading units

**TOPIC 3**
Load securing provisions

**TOPIC 4**
Handling of dangerous goods in intermodal transport

**TOPIC 5**
Horizontal Activities
OCR Technologies - European Database of ILUs
Legal and Business requirements - Common E-Learning Tool Platform

The project started in September 2012
Unique Dissemination Network

15 Associations officially support DESTINY
(more will join the network during project duration)
THANK YOU FOR YOUR ATTENTION!

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