COMBINED TRANSPORT
Past, Present and Future

Europe-Asia Intermodality
Kiev – 28.09.2004
Rudy COLLE
Definitions
Source: EC/ECMT/UNO

- MULTIMODAL TRANSPORT
  Carriage of goods by two or more modes of transport

- INTERMODAL TRANSPORT
  The movement of goods in one and the same loading unit or road vehicle, which uses successively two or more modes of transport without handling the goods themselves in changing modes

- COMBINED TRANSPORT (CT)
  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
CT Techniques

Unaccompanied Transport

Accompanied Transport
Comparison CT and Road Haulage

Road Haulage

CT operational

CT commercial

SHIPPER

ROAD HAULER

CT OPERATOR

CONSIGNEE

ROAD HAULER

Type 1

Type 2
CT operators

3 main groups

- The railway undertakings (RU)
- RU subsidiary companies:
  - Intercontainer (ICF)
  - Transfracht
  - ...
- Private operators:
  - UIRR member companies
  - others (Transfesa, ...)

Kiev – 28/09/04
UIRR s.c.r.l.

**Founded**  October 1970 – Munich

**Two-level organisation (decentralised structure)**

- **LIAISON OFFICE BRUSSELS**
  - overall promotion of CT
  - political instances EU/ECMT/UNO
  - professional bodies (IRU/UIC/EIM/CER/FIATA/CLECATA, ...)
  - coordination of members’ activities
  - service center (projects, reports)

- **MEMBER COMPANIES**
  - organising and marketing of CT
  - wagons in ownership – management of transhipment yards (terminals)
UIRR membership 2004
(in 13 EU countries and Switzerland)

• FULL MEMBERS (18)
  = CT as their main activity
  = registered capital held by
    • (majority) road hauliers and forwarding agents
    • (minority) RU and other UIRR members
    • mostly terminal-to-terminal operations

• ASSOCIATED MEMBERS (1)
  = CT as a subordinate activity
UIRR membership 2004 - Map
### UIRR traffic data 2003

<table>
<thead>
<tr>
<th></th>
<th>Full Members</th>
<th>Full and Associated members</th>
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</thead>
<tbody>
<tr>
<td><strong>Total traffic</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Consignments</td>
<td>2,1 Mio.</td>
<td>2,3 Mio.</td>
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<tr>
<td>- TEU</td>
<td>4,7 Mio.</td>
<td>5,3 Mio.</td>
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<tr>
<td>- Tkm</td>
<td>34 Billion</td>
<td>34 Billion</td>
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<tr>
<td>- Tons</td>
<td>48 Billion</td>
<td>53 Billion</td>
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<td><strong>Breakdown per technique</strong></td>
<td></td>
<td></td>
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<tr>
<td>- Accompanied</td>
<td>22%</td>
<td>100%</td>
</tr>
<tr>
<td>- Unaccompanied</td>
<td>78%</td>
<td></td>
</tr>
<tr>
<td>* Swap bodies / containers</td>
<td>70%</td>
<td></td>
</tr>
<tr>
<td>* Semi-trailers</td>
<td>8%</td>
<td></td>
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<tr>
<td><strong>Breakdown per geographical scope</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- National</td>
<td>33%</td>
<td>38%</td>
</tr>
<tr>
<td>- International</td>
<td>67%</td>
<td>62%</td>
</tr>
</tbody>
</table>
UIRR traffic breakdown per technique (2003)

- **Swap Bodies & Containers**: 70%
- **Semi-trailers**: 8%
- **Rolling Motorway**: 22%
Future Development (1)

EU policy (White Paper 2001)

- Modal split 2010 = 1998*
- If no change in trends HDV +50%
- If White Paper successful HDV +38%
  - meaning Rail freight +50%
  - CT +100%

* With short sea: Road 44% Rail 8% SSS 41% Inland Waterway 4% Pipelines 3%
* Without short sea: Road 74% Rail 14% SSS - Inland Waterway 7% Pipelines 5%
Future Development (2)

CONDITIONS (1)

• *Framework conditions*
  ▪ Fair and equal opportunities of market access for all modes, through
    • Rail liberalisation (=> competition => quality)
    • Equitable allocation of infrastructure and social costs to all modes
    • Regard for social and operational regulations
  ▪ Infrastructure appreciations
  ▪ Swifter implementation of political decisions
Future Development (3)

CONDITIONS (2)

- *Economic constraints*
  - Massification of traffic (i.a. back to back)
  - Expansion (i.a. geographical)

- *Responding to customers’ expectation*
  - Quality
  - Pricing
  - Information

Proper interfacing and network supply: established role of UIRR
Expansion to the East

Difficulties

- Track width
- State of the rail infrastructure
- Terminal capacities and equipment
- Financing of elimination of bottlenecks
- Transport security
- Customs procedures
- Climate
- Commercial mind
- Different mentalities
Advantages of CT: general

• relief of the road network
• transfer of goods to a safer and environment-friendly transport mode
• 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 larger distances)
• competitiveness in given circumstances
Advantages of non accompanied CT

- Savings in variable costs (fuel, tyres, maintenance)
- Reduction in personnel (drivers, driving hours, night work)
- Easier enforcement / control over work regulations
- Improved organisational flexibility
- Exemption / reduction of vehicle/taxes
- Avoidance of road circulation/taxes
- No/less road transport permit requirements
- Reduced vehicle parks and subsequent capital appropriation needs
- Non-application of Sunday / holiday embargo provisions
- Less damage claims relative to transported goods
Advantages of accompanied CT (RoMo)

- Overall cost advantages vs. full-road transportation
- Border crossings without permit requirements
- Reimbursement of vehicle taxes
- Savings on circulation taxes
- Train-trip recognised as drivers’ rest-time
- Weight advantage in Alpine transit
- Exemptions from Sunday/holiday interdictions
- Easier customs-clearance in terminals