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Joint ECMT/UNECE Working Party/Group on Intermodal Transport and Logistics¹
(29 and 30 March 2006)

Working Party on Intermodal Transport and Logistics
(Forty-fifth session, 30 March 2006,
agenda item 3)

NEW DEVELOPMENTS IN INTERMODAL TRANSPORT

Transmitted by the
International Union of Combined Road/Rail Transport Companies (UIRR)

1. The policy of promoting intermodal transport, which UIRR naturally supports, continues to generate positive results. Indeed, Combined Transport (CT), whose main objective is to contribute as much as possible in transferring road traffic to rail for freight transport, enjoyed a certain renaissance in 2003 following a period of uncertainty regarding its relevance. The negative evolution from 1997/98 was essentially due to an unhealthy economic climate, but was also the result of poor rail service quality, i.e. lack of train punctuality, which did not meet with CT users' expectations².

¹ ECMT and UNECE have adopted cooperative arrangements in establishing the "Joint ECMT/UNECE Working Party/Group on Intermodal Transport and Logistics" consisting of separate ECMT and UNECE segments, the UNECE segment consisting of its Working Party on Intermodal Transport and Logistics (WP.24).

² Detailed statistics on the recent evolution of the volumes transported by UIRR companies will be available at the meeting.

2. Overall, there has been an increase in the volume transported by the UIRR combined transport operators over the last few years. In 2004, its members transported 2,350,000 consignments or 5,390,000 x 20ft equivalent. This represents a 200 km line of lorries transferred every working day from road to rail. International unaccompanied transport increased by 14% between 2003 and 2004. Transalpine traffic has again encountered a significant increase, particularly for traffic from or to Germany (Gothard and Brenner) which has increased by 11%.

3. The majority of European CT flows are concentrated on the North-South axis. Almost 70% of international unaccompanied CT is transalpine, mainly because road transportation is hindered in these mountainous areas, but also by Swiss policy towards heavy vehicles (taxation, maximum weight). Other changes have recently emerged in traffic flow planning: for example, the Belgium-Italy traffic had to be moved from the Modane axis onto the Gothard axis due to the unreliability of rail services in France. Also, UIRR intermodal traffic from and to the United Kingdom has disappeared because of the Franco-British authorities' inability to manage the influx of illegal immigrants through the Channel tunnel and the horrendous operational difficulties which consequently arose for rail operations.

4. As far as the rolling motorway is concerned, volumes transported have significantly decreased on certain axes following the widening of the European Union and the resulting facilitation of road transport by the suppression of the original external borders and agreements between old and new member States. The rolling road service between Dresden (D) and Lovosice (CZ), which carried over 93,000 consignments in 2003, had to be discontinued in June 2004 after a new motorway connecting the two hubs was opened. This overall decline was accentuated by the suppression of ecopoints which taxed heavy vehicles travelling through Austria. However, on certain rolling motorway routes, volumes carried have been maintained where an improvement in quality of service has now been achieved with the aid of Governmental support. Of course, the advantages of CT over road transport (e.g. transportation of large volumes over long distances, the railways' rolling motorway allowing drivers to have rest periods from the road, exemption from weekend/public holiday lorry bans) continue on the whole to transfer road transport to rail. This should certainly be the case for the axes connecting the Eastern and Western European continent, where significant growth is expected.

5. The same trends as 2004 are confirmed for the beginning of 2005, with a significant drop in rolling motorway volumes, whilst a slight increase in international unaccompanied CT can be seen. Although UIRR is still collating data for the second half of 2005, it believes that a recent decline in the quality of services provided by the railway sector (traction companies and infrastructure managers) may have a negative impact on traffic which could be translated into figures in a few weeks' time.

6. For 2004, specific operating conditions contributed particularly to the increase in international unaccompanied CT: the liberalization of the railway market in Germany led to an improvement in service quality, which in turn highlighted the advantages of CT. Various production plans put in place, such as maximizing train capacity or using gateways (hubs between national and international traffic flows) also facilitated this development.

7. Nevertheless, the market share of rail in freight transportation continues to decline overall for the benefit of road. This is why it is essential that UIRR continues to concentrate its efforts at the political level, in order to establish optimum framework and conditions to encourage the development of CT, which proves to be the best instrument for the transfer of freight to rail. The framework conditions under the rail companies' responsibilities (stable pricing structure, improvement in service quality or the apportion of commercial risk in the system of operating complete trains) and under countries' responsibilities (stable regulations for weights and dimensions of road vehicles in order to secure investments in rail transferable equipment, public financing of combined transport terminals) could prove very beneficial to the development of CT, but are often not enough. CT encounters bottlenecks, lack of quality and lack of co-operation between the rail companies on certain routes and priority given to passengers for railway resources. The example of a shortfall of locomotives and train drivers for freight operations is the most significant one.

8. Furthermore, a slide in the split of rail transport methods has taken place: a decline in terms of traffic carried out by rolling motorway (16% in 2004 as opposed to 22% in 2003) and by semi-trailers (7% in 2004 as opposed to 8% in 2003) can be seen. These decreases have benefited figures for swap bodies (77% in 2004 as opposed to 70% in 2003).
