



18th Florence Rail Forum

Rail Freight: The Sick Man of Europe?

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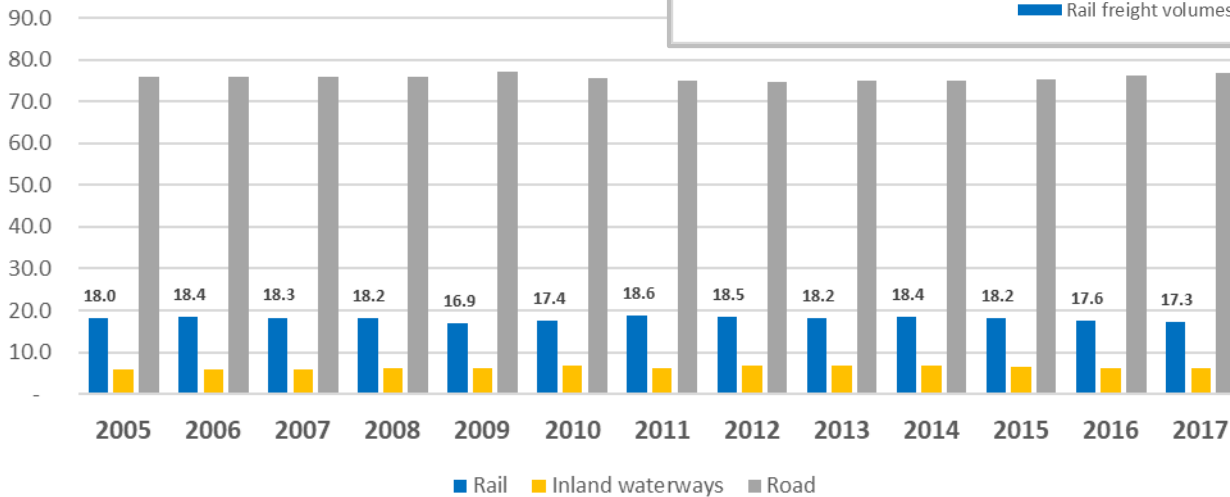
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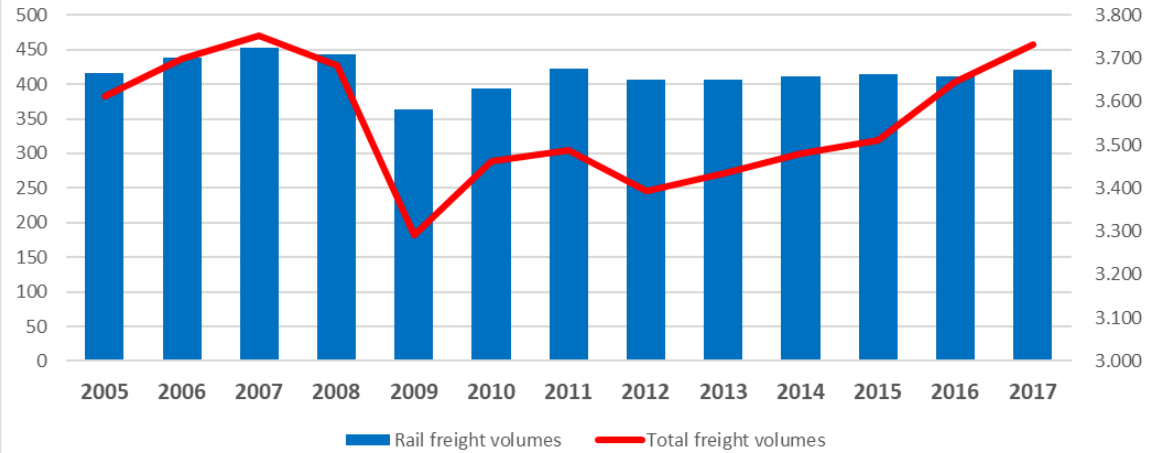
A chronic disease?

Modal split of freight transport on land
(estimated %, 2005-2017)



Evolution of freight volumes

(bn tonne-km, 2005-2017)





An age of declarations?

- 2003: CER, UIC, CIT "Freight Quality Charter"
- 2011: Commission Transport White Paper
- 2013: CER, EIM et al. "Challenge 2050: The Rail Sector Vision"
- 2015: CER and ETF "Rail Freight Declaration"
- 2016: Rotterdam Ministerial Declaration & Sector Statement "Boosting International Rail Freight"
- 2018: Vienna Declaration "Progress on Boosting Rail Freight"
- 2017: Rail Freight Coalition Whitepaper "30 by 2030"

Some symptoms

Punctuality of (intermodal) rail freight services not in line with customer needs:

- **RFC network**: 30-80% at departure / 20-70% at arrival
- **At terminal handover** (one CT operator on Rhine-Alpine):

Further deterioration: 1-4/2018: **69%** > 1-4/2019 **64%**

Barriers at borders persist:

- On average **1.5 to 12 hours** on Orient/East-Med RFC

Lack of resilience against major disruptions:

- Share of re-routed trains (Modane disruption 2019): **10 %**



An insufficient treatment?

Key cornerstones of **EU rail (freight) policy**

Regulatory – **4 railway packages**

- **Market opening**: rail freight as the front-runner since 2007
- **Technical and operational harmonization**: Interoperability, Safety, Train Driver Directives

Financial: **EU co-funding** for transport infrastructure 2014–2020

- CEF: **€19.7 billion**, out of which **74%** for **rail**
- ERDF & cohesion funds: **€70.1 billion**, out of which **27%** **rail**



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A new opportunity?

Freight transport continues to grow

- EU projection for all modes : **+30%** (2030), **+50%** (2050)
- **Road alone** cannot absorb, a “**capacity crunch**” is looming

Addressing **climate change** – new momentum for rail freight

- EU Long-Term Strategy for **Climate-Neutral Europe by 2050**
- Proposal for a “**European Green Deal**”



Is digitalisation the cure?

Digitalisation is not an objective, it's a tool:

- Better **customer service**
- Closer **integration of modes, services and stakeholders**
- More **efficient operations at all levels**
- Better **utilization of scarce capacities**
- Lower **environmental footprint**

Let's discuss **what we can achieve together** in the **coming years!**