




**COSMOS** Final conference

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## Intermodal Growth in the COSMOS Area

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KombiConsult GmbH


Wien, 12 June 2014



## Intermodal Growth in the COSMOS Area

### COSMOS – Objectives

- Fostering the development of (combined) intermodal transport in South-East Europe
- **C**ooperative **S**olutions for **M**anaging **O**ptimized **S**ervices (COSMOS)
- [www.intermodal-cosmos.eu](http://www.intermodal-cosmos.eu)
- Co-financed by the European Commission in the framework of a Marco Polo Common Learning Action



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<b>COSMOS – Partners</b>		
KombiConsult	Germany	Consultancy
Adria Kombi	Slovenia	Intermodal Operator
Bohemiakombi	Czech Republic	Intermodal Operator
Crokombi	Croatia	Intermodal Operator
DB Schenker Austria	Austria	Logistics Service Provider
DB Schenker Bulgaria	Bulgaria	Railway Undertaking
DB Schenker Romania	Romania	Railway Undertaking
Ecologistics*	Bulgaria	Terminal Operator
Gysev Cargo	Hungary/Austria	Railway Undertaking
HaCon	Germany	Consultancy, IT
Lokomotion	Germany	Railway Undertaking
Slovenian Railways	Slovenia	Railway Undertaking
Trans Express**	Bulgaria	Logistics Service Provider

page 7      \* until 31.08.2013; \*\* from 01.09.2013

Intermodal Growth in the COSMOS Area	
<b>Promoting and disseminating intermodal transport</b>	
<ul style="list-style-type: none"><li>▪ Promoting intermodal transport as such, and in particular supporting schemes for modal shift to (intermodal) rail services (administrative, fiscal, technical, financial measures) towards targeted stakeholders (market parties, operational partners and political/public stakeholders)</li><li>▪ Dissemination of project results (“promoting campaign”):<ul style="list-style-type: none"><li>– Round tables,</li><li>– <b>Final conference</b>,</li><li>– Knowledge platform (<a href="http://www.intermodal-cosmos.eu">www.intermodal-cosmos.eu</a>),</li><li>– Other measures such as press releases and COSMOS presentations at conferences and seminars</li></ul></li></ul>	

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Co-ordinate the findings and innovative ideas of the nucleus partners and CREAM and DIOMIS studies

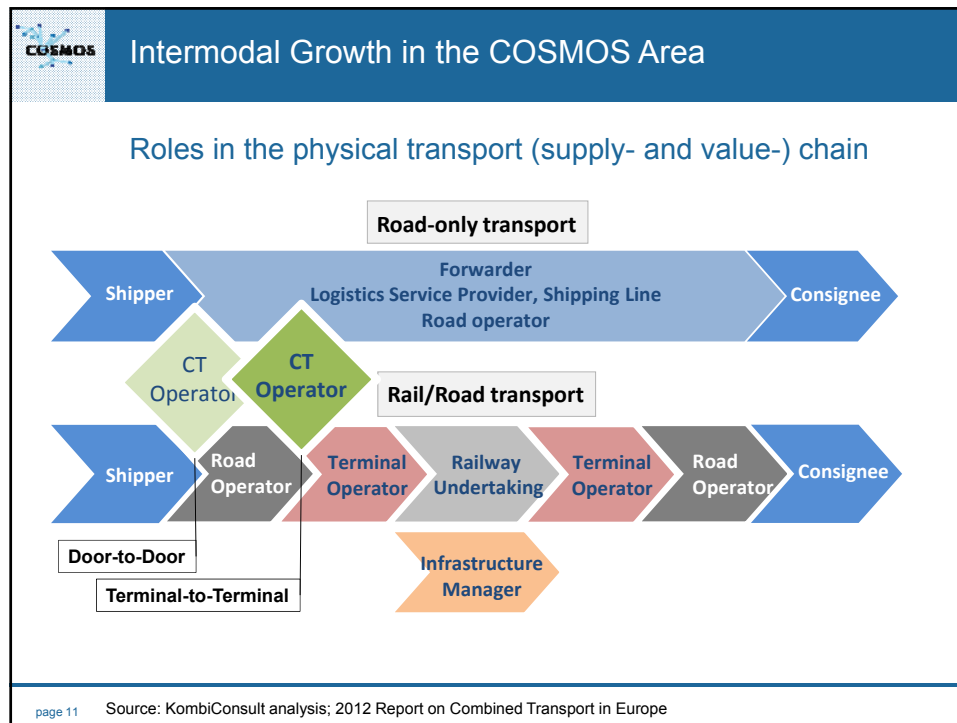
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**Round Tables – Overview**

- 6 Round Tables performed
- Demonstrated the large potential of the sector and its innovative actors
- ~ 150 attendees
- Intermodal sector in SEE has made a considerable progress
- But sector still challenged
- Massive investments in transport infrastructure
- Rail, intermodal transport operators and logistics services suppliers have created new models for extending services

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- Intermodal Growth in the COSMOS Area**
- Roles in the physical transport (supply- and value-) chain
- Combined transport operators (OP) supplying mostly multi-user CT services on account of third parties
  - Logistics service providers (LSP) such as forwarding agents or shipping lines operating dedicated or multi-user CT services
  - Railway undertakings (RU) providing proprietary CT services in addition to rail traction services
  - Shippers, terminal and port operators (Others) supplying CT services to strengthen core business and/or distribution logistics
- page 12 Source: KombiConsult analysis; 2012 Report on Combined Transport in Europe;

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### Round Tables – Status quo of rail freight traffic

- Dominance of road freight transport in all countries
- Drop of total freight volume in recent years, mainly due to the loss of road volume related to the economic crisis
- Development of rail freight volume mainly stayed on a low level after fall of iron curtain
- Quick wins could be realised by road transport which was often more flexible, open to entrepreneurship and promoted by truck and construction industry and government
- In contrast to that the rail sector lacks coherent infrastructure investments, both in maintenance, refurbishment and new builds, old and general poor state or repair of rolling stock, focus on corridors or main railway lines

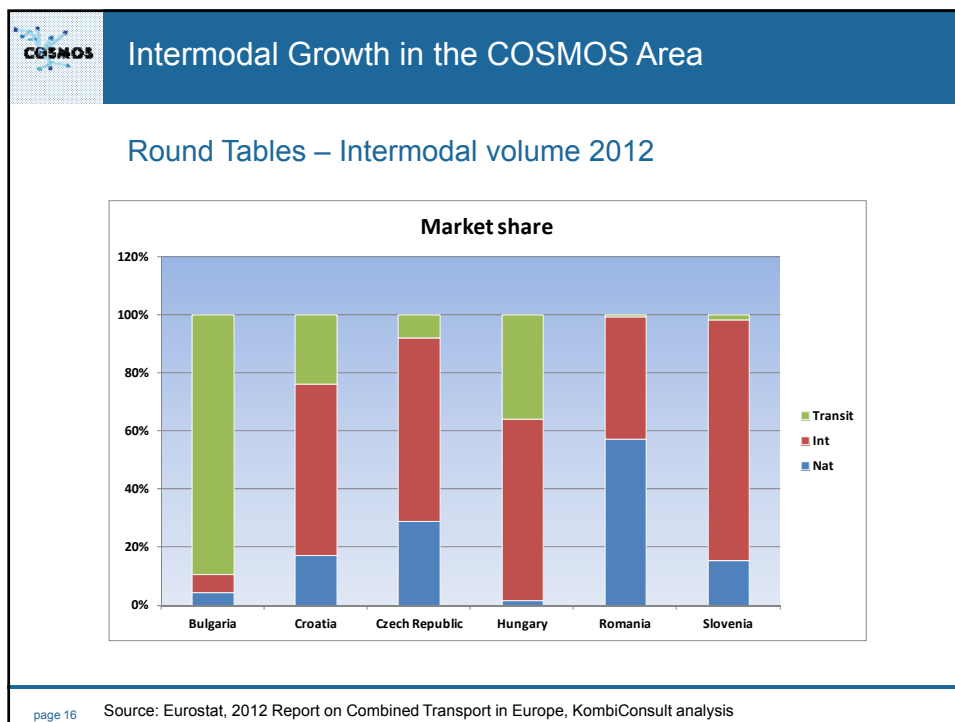
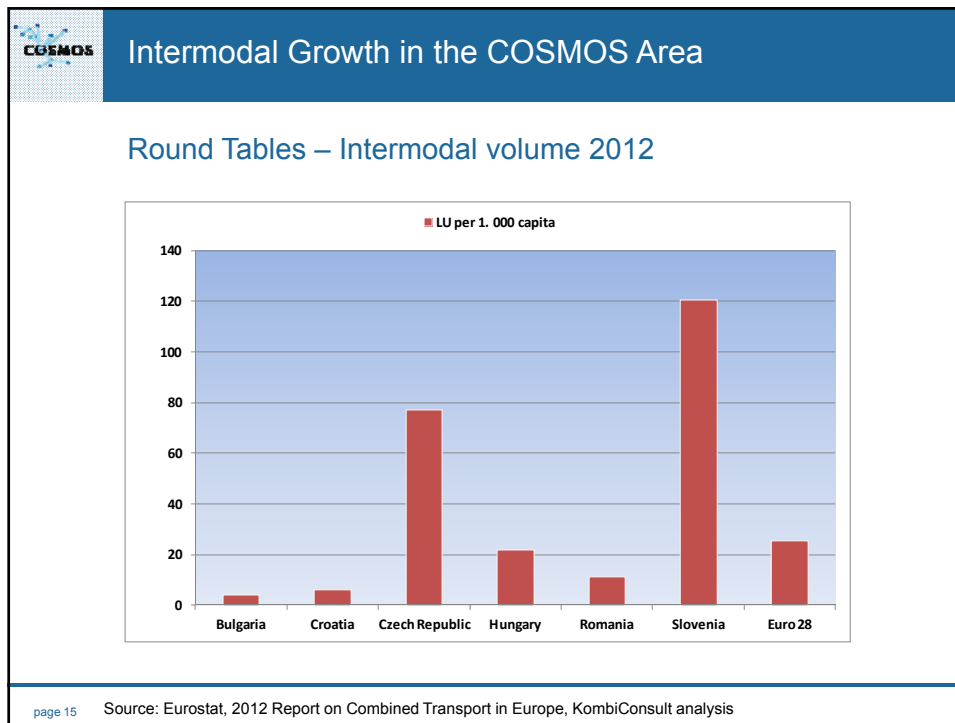
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### Round Tables – Intermodal volume 2012

Country	Intermodal Volume (2012)
Bulgaria	~50,000
Croatia	~50,000
Czech Republic	~800,000
Hungary	~210,000
Romania	~220,000
Slovenia	~250,000

page 14 Source: Eurostat; KombiConsult analysis



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### Round Tables – Intermodal services

[www.intermodal-cosmos.eu](http://www.intermodal-cosmos.eu)  
 Visualisation of regular intermodal services  
 Raise awareness of the sector

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### Round Tables – Intermodal services

Start	End	weekly	Operator
Köpen	Amst	1	Adria Transport d.o.o.
Constante	Proceas	2	Albania Terminal
Proceas	Burhanes	1	Banding
Proceas	Amst	6.5	Hipac
Geik	Amst	4	FB
Burhanes	Amst	1	Kombiwebfahr
Constante	Suresse	2	Rail Container
Constante	Neche	1	Rail Container
Constante	Almarcos	2	Rail Container
Constante	Fluoch	1	Rail Container
Constante	Budapest	1	Rail Container
Constante	Fluoch	3	Rail Container
Constante	Fluoch	3	RauschDacia
Constante	Amst	3	Rail Container
Budapest	Amst	1	ICO (Hungaria Kft)
Constante	Burhanes	0.5	Sartroux
Constante	Burhanes	2	Tibbalt Logistics
Wals	Burhanes	2	Tibbalt Logistics

Trenbilis Budapest - Fluoch		Departure	Closing Time	Arrival	Availability
1	-----	-----	-----	-----	-----
2	-----	12:00	-----	10:00	-----
3	-----	-----	-----	-----	-----
4	-----	12:00	-----	10:00	-----
5	-----	20:00	-----	08:00	-----
6	-----	18:00	-----	20:00	-----
7	-----	18:00	-----	18:00	-----

Trenbilis Fluoch - Budapest		Departure	Closing Time	Arrival	Availability
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7	-----	18:00	-----	18:00	-----

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Nine Trans-European Core Network Corridors (extract)

<b>Orient/East-Med</b>	Germany – Austria/CZ/SK – Romania – Bulgaria – Greece/ TR border
<b>Rhine-Danube</b>	France – Germany – Austria/CZ/SK – Bulgaria – Croatia / Romania
<b>Mediterranean</b>	Spain – France – Italy – Slovenia – Croatia – Hungary – UA border
<b>Baltic-Adriatic</b>	Poland – CZ/Slovakia – Austria – Slovenia – Italy

page 19 Source: COM 2011/650; KombiConsult analysis

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Nine Trans-European Core Network Corridors

- Not all of the former Pan-European Transport Corridors (IV, V, VII, or X) were intersected in the respective countries anymore
- Only parts or one corridor per country were maintained in the attention of the EU and became part of the “Mediterranean” TEN-T core net corridor now
- Some links with neighboring countries were cancelled neglecting former routings and important trades
- Well-known and used names were replaced by new ones
- Pre-identified projects in favour of rail are a good starting point but need to be substantiated , co-financed, prioritized in the scope of the “Corridor Work Plan” by end of 2014 and applied for.

page 20 Source: COM 2011/650; KombiConsult analysis



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### Rail Infrastructure

- Line type (single/double) and class (axle load/m-load)
- Electrification and power supply systems
- Signalling system and train control systems.
- Loading profile and maximum permitted train length
- Maximum permitted (freight) train speed
- Capacity constraints and other obstacles
- Border crossing procedures

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### Railway network – overall actual status

Parameter	Unit	Objective Reg. 1315/2013	Actual value (example HR)
Lauding gauge		P/C 70 / 400	P/C 80/410; P/C 52/368 (Rijeka-Ogulin)
Nominal speed	km/h	120	~ 50
Mass per axle	t/axle	22,5 v≤100 km/h	22,5
Minimum useful siding length	m	740	~ 500
Gross tonnage of trains	t	1.500	~ 1.200

page 22     Source: KombiConsult analysis; Round Table Croatia 2014

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Impact of the maximum permitted train length

	Maritime		Continental	
Train length	500 m	700 m	500 m	700 m
Wagon length	26 m	26 m	34 m	34 m
N°of wagon	19	26	14	20
Capacity	4 TEU	4 TEU	2 ST	2 ST
Total Capacity*	76	104	28	40
Difference	28 TEU		12 Semi-Trailers (ST)	
<b>Efficiency</b>	<b>+27%</b>		<b>+30%</b>	
Wagon type	Sggns/Sggr/ss 80'		T3000 104'	

\* Maximum train weight may reduce the total capacity

An increase of the maximum permitted (wagon) train length from 500 to 700 m would bring a gain in efficiency by 30% in continental and 27% in maritime traffic.

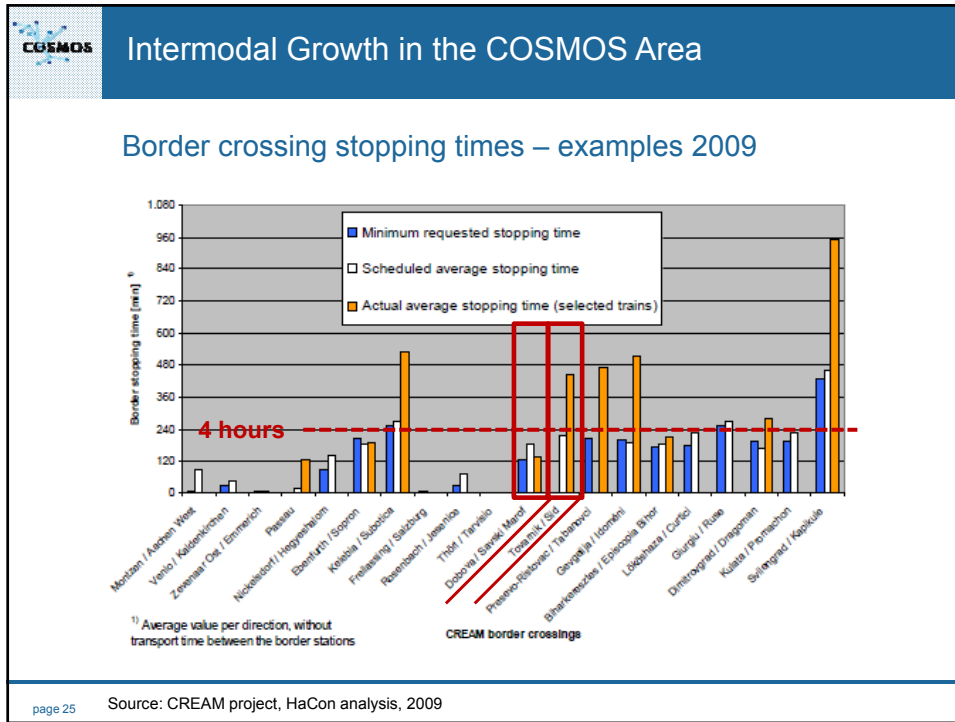
page 23 Source: KombiConsult analysis

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Railway operation

- Access to the network by different “applicants” (railway undertakings)
- Availability of efficient locomotives and skilled drivers
- Availability of rolling stock and maintenance and repair facilities
- Information exchange across borders

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### Good practices – Overview

"Good Practice" name	Provided by	(1) Market requirements	(2) Rail production	(3) CT wagons	(4) CT terminals	(5) ICT / data exchange	(6) Commercial conditions
1 Train Monitor	HaCon					■	
2 Container Allocation Management (CAM)	Adriakombi				■	■	
3 Bohemia Express	Bohemiakombi	■	■				
4 Cargo Centre Zagreb	Crokombi	■			■		
5 Train monitoring platform	Schenker RLF	■				■	
6 Information management for international freight trains	DB Schenker Rail Romania					■	
7 Mobile repair teams	DB Schenker Rail Bulgaria	■	■				
8 Intermodal transport of marble between Bulgaria and Italy	Ecologistics	■	■				
9 Intermodal block train building	GYSEV CARGO	■	■		■		
10 Joint locomotive pool and maintenance strategy	Lokomotion		■				
11 Gateway Slovenia	SZ	■	■		■		
12 Efficient intermodal wagons	KombiConsult			■			
13 Business models for intermodal transport	KombiConsult	■					
14 PowerRailer – block train system for South-East Europe	Schenker RLF	■	■				■
Number of "Good Practices" per category		9	7	1	4	4	1

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Time	Topic / Contributor
10:00	<b>Welcome</b> by Helmut Schweighofer, Member of Board, Schenker & Co AG
10:10	<b>Incentive schemes and EC programmes supporting intermodal transport in Europe</b> by Gerhard Troche, European Commission, DG MOVE
10:40	<b>Status-quo and prerequisites for intermodal growth in the COSMOS area</b> by Uwe Sondermann, project leader, KombiConsult
11:00	<b>Interoperable rail infrastructures and seamless border crossing operation</b> Reinhard Papp, Head of SEE block train services , Schenker & Co AG, Edgar Bleier, CFO, DB Schenker Rail Romania, Armin Riedl, CEO, Lokomotion
11:45	Coffee Break
12:00	<b>Core ports, terminals and intermodal services</b> Janez Merlak, Chief Operations and IT Manager, Adria Kombi Vladimir Fiser, CEO, Bohemiakombi Gábor Márta, Sales and Marketing Director, GYSEV Cargo
12:45	Joint Lunch

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Interoperable rail  
infrastructures and  
seamless border crossing  
operation