



Panteia

Research to Progress

Research voor Estelid | EIM | NEA | CO | Stratus | IPM

Linked  by Rail



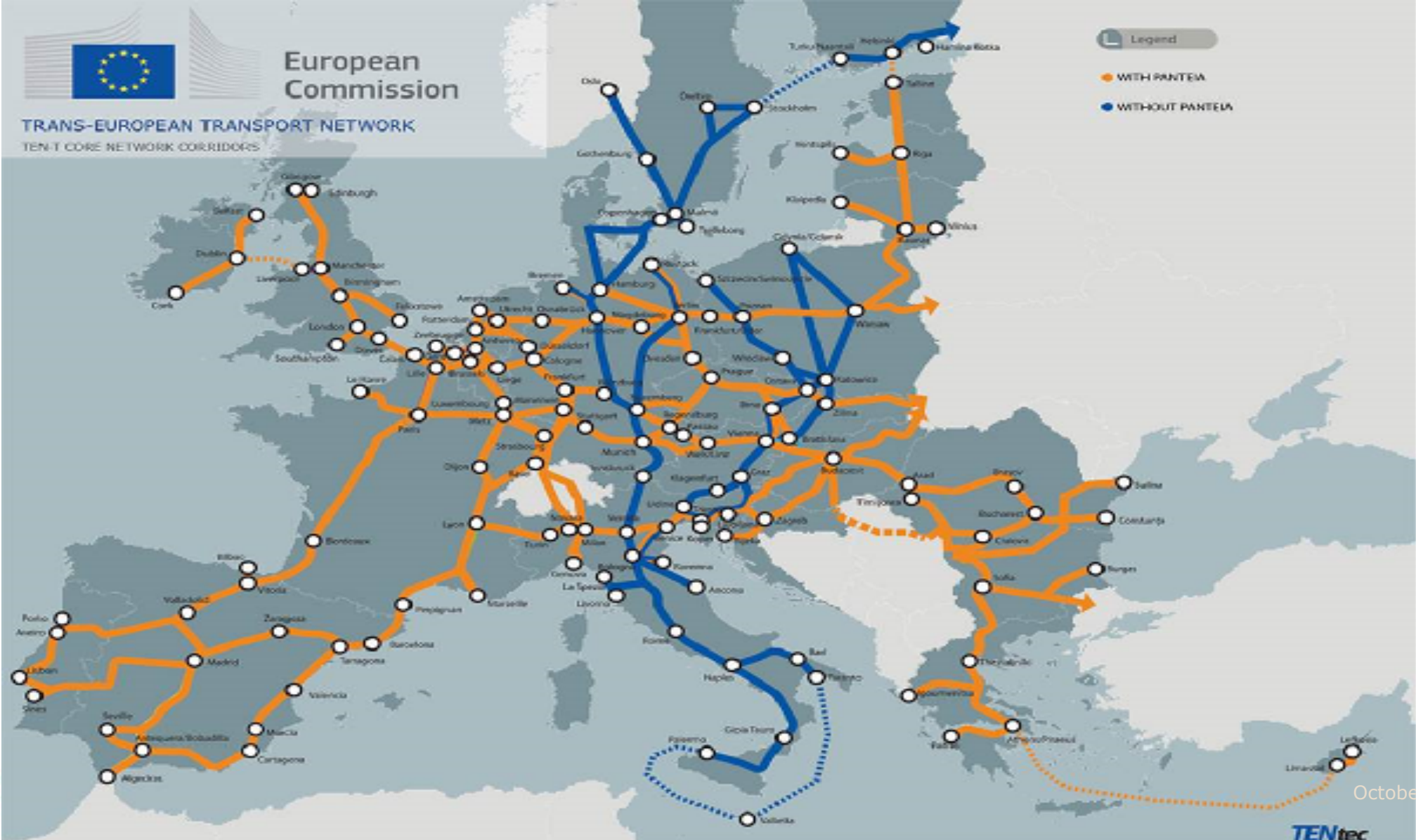
intermodal is future

Adriaan Roest Crollius

May, 2019

TEN-T corridor studies

Panteia is involved in 7 out of 9 EU corridor studies



'Linked by Rail'

- 'Linked by Rail' – is a consortium of companies promoting intermodal transport between The Netherlands and Poland. Aiming at the increase of the number of rail services, but also the service level.
- The consortium represent the complete transport chain and is supported by the Ministry of Transport and the Dutch Enterprise Agency.

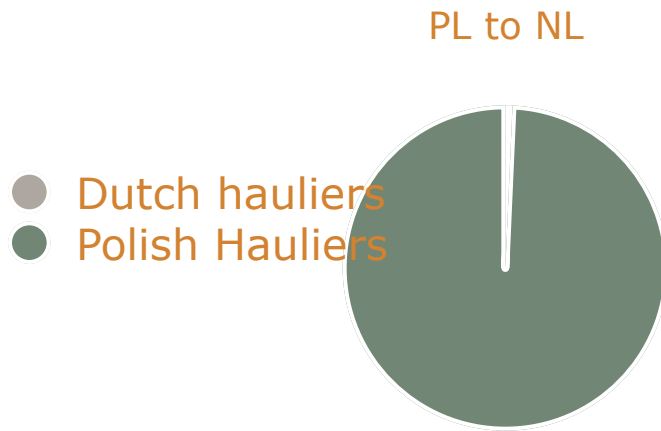


Linked by Rail

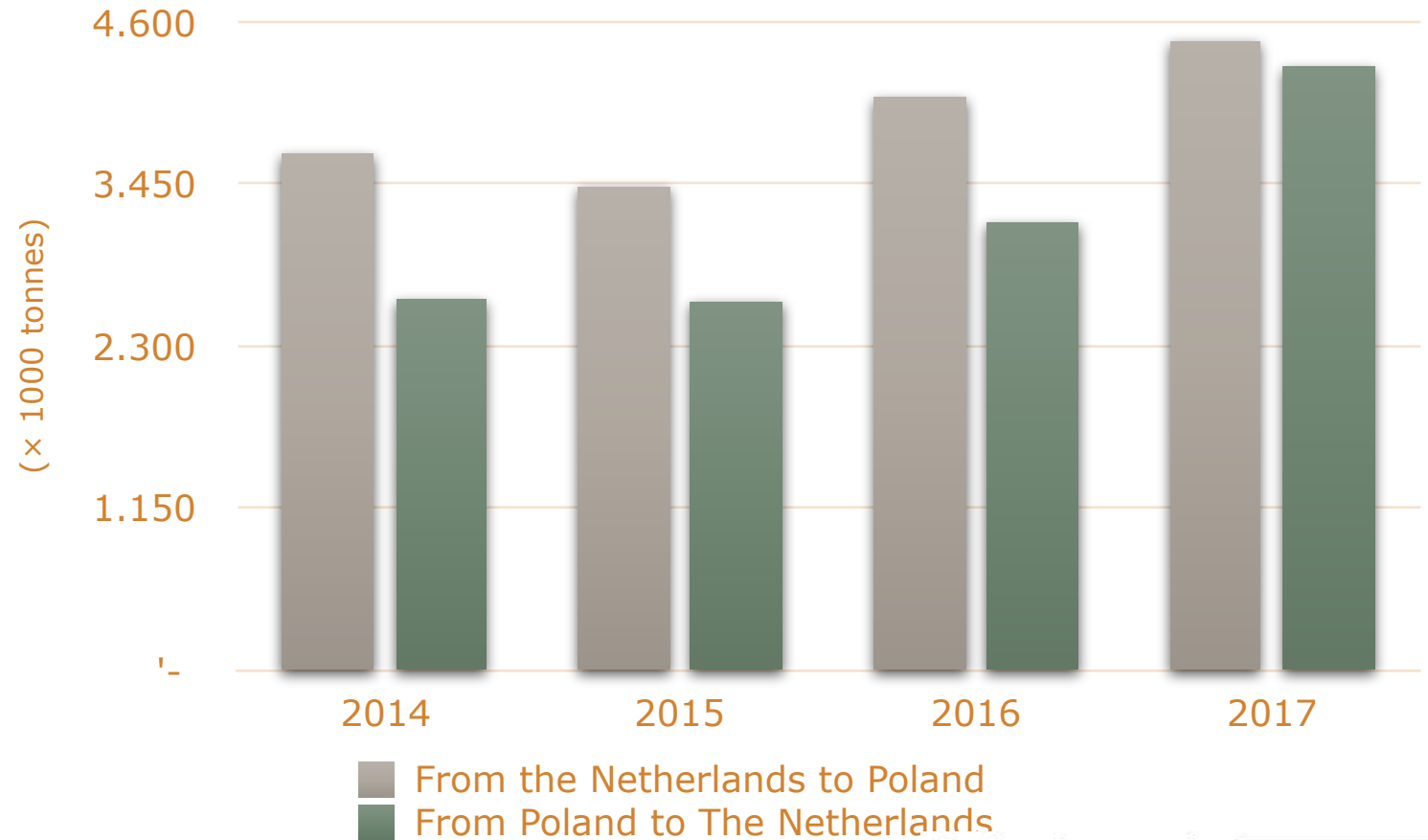


www.linkedbyrail.com.pl

Road transport



Total freight transport by road

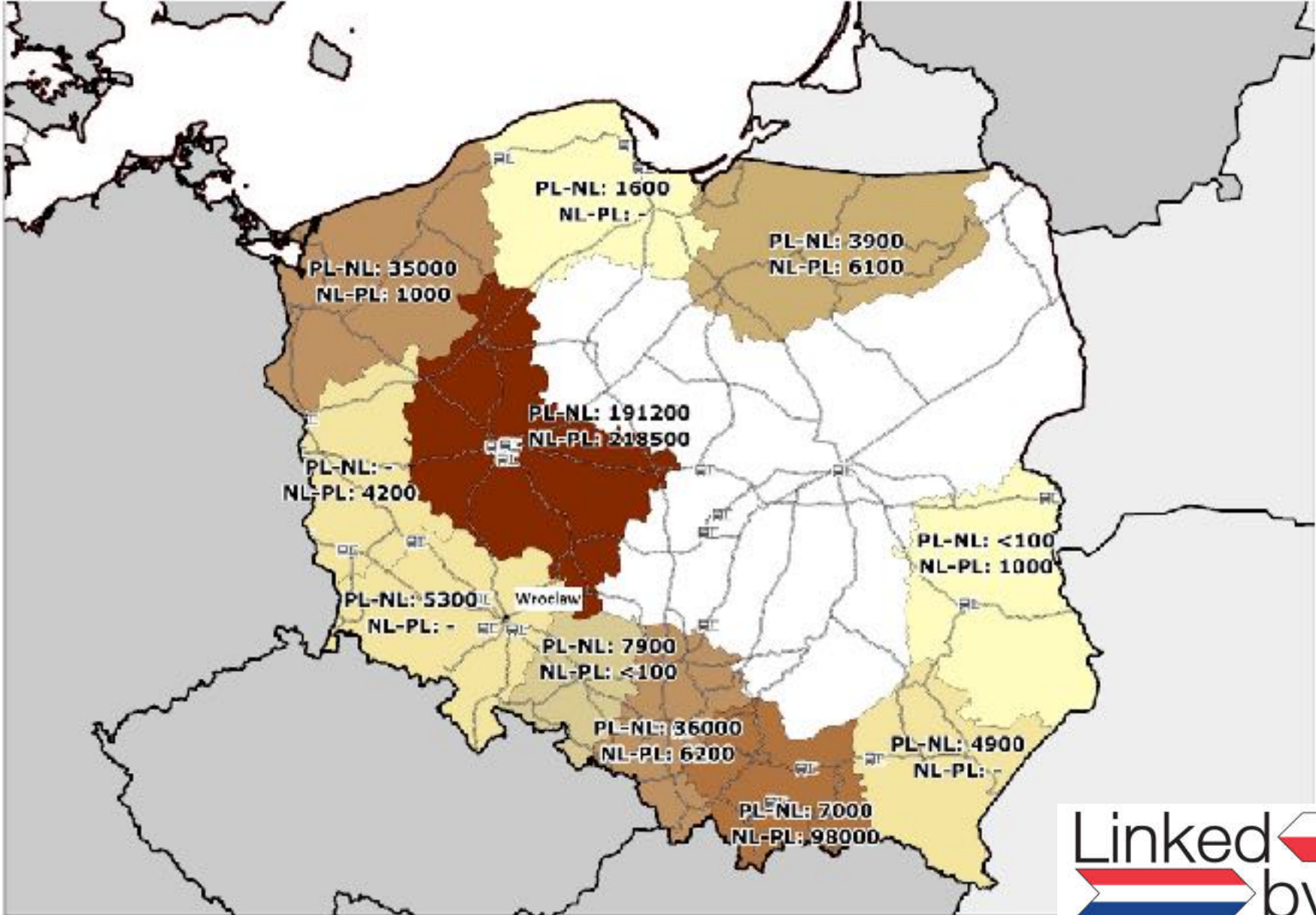


Rail transport volumes

- Sharp increase
- Focus on intermodal; not on wagon load
- But mostly concentrate on Central Poland, extra growth potential in Southern Poland
- Volumes doubled between 2016-2017



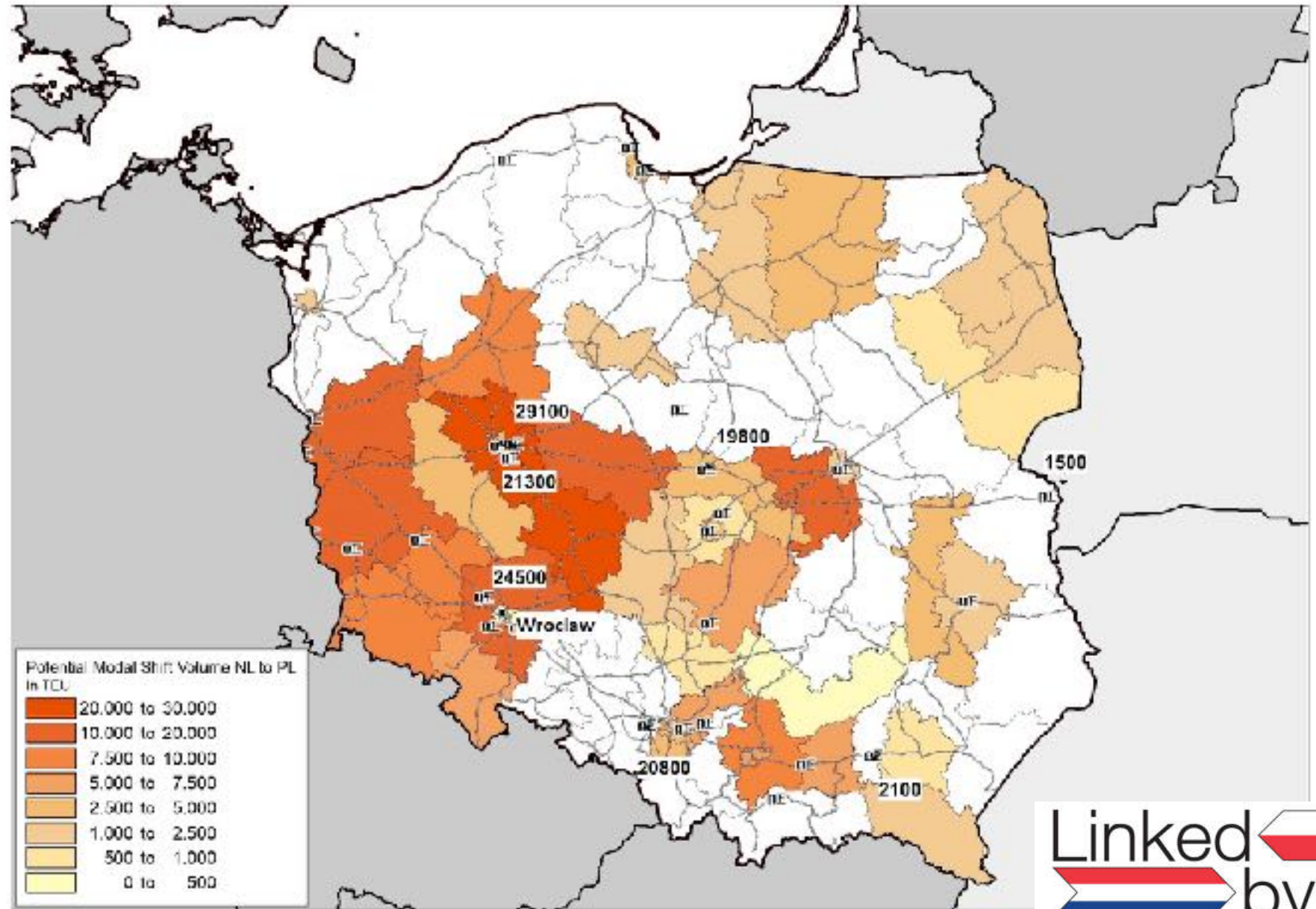
Rail Transport volumes per region (2015, in TEU)



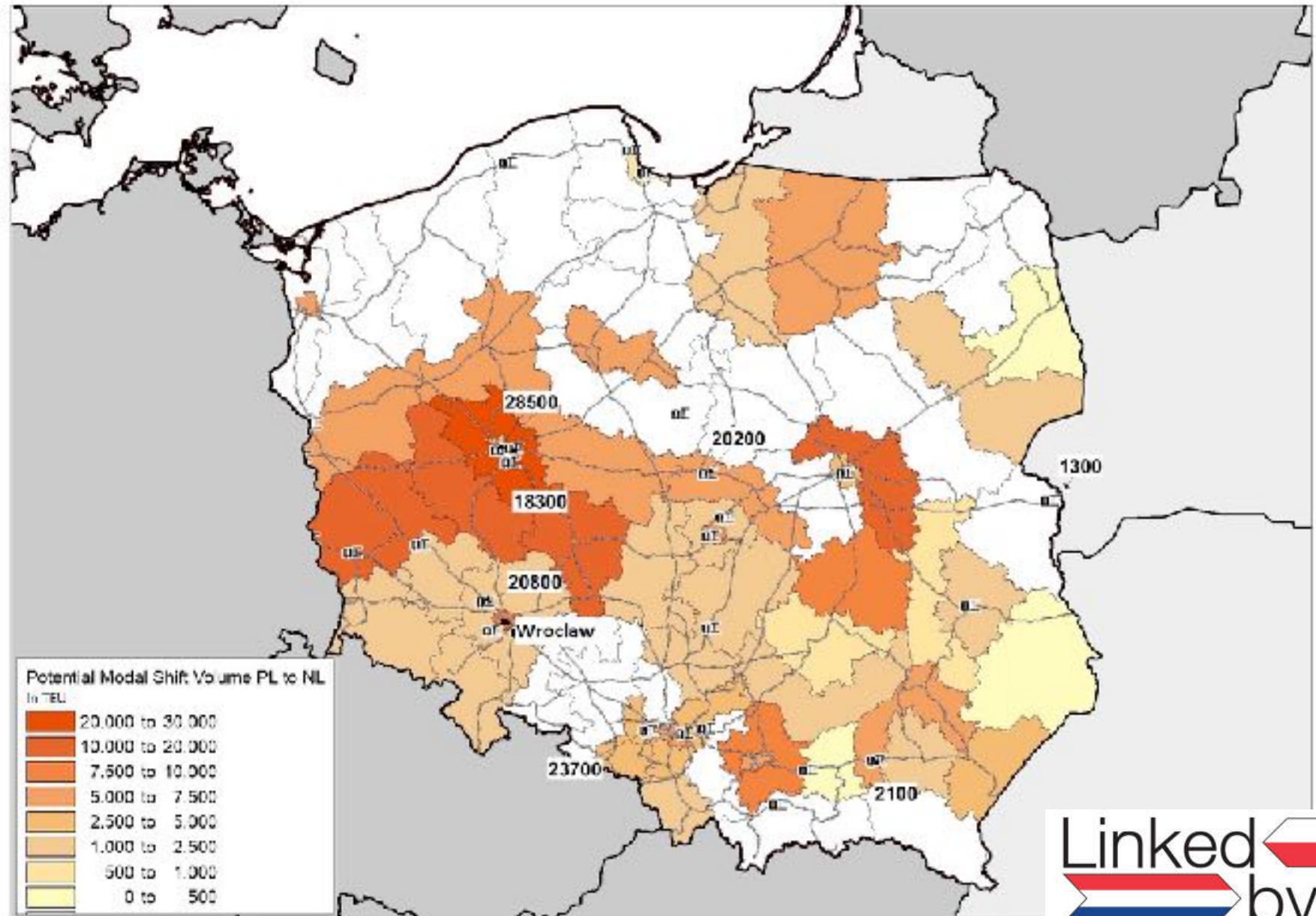
Modal shift potential

- 1.2 million tonnes transported by rail in 2017.
- In potential, another 2.2 million tonnes could shift from road to rail.
- The accompanied cost savings are 30%, €129 million.
- It would also result in 38% less CO2 emissions (182 kiloton CO2)

Modal shift potential (NL to PL)

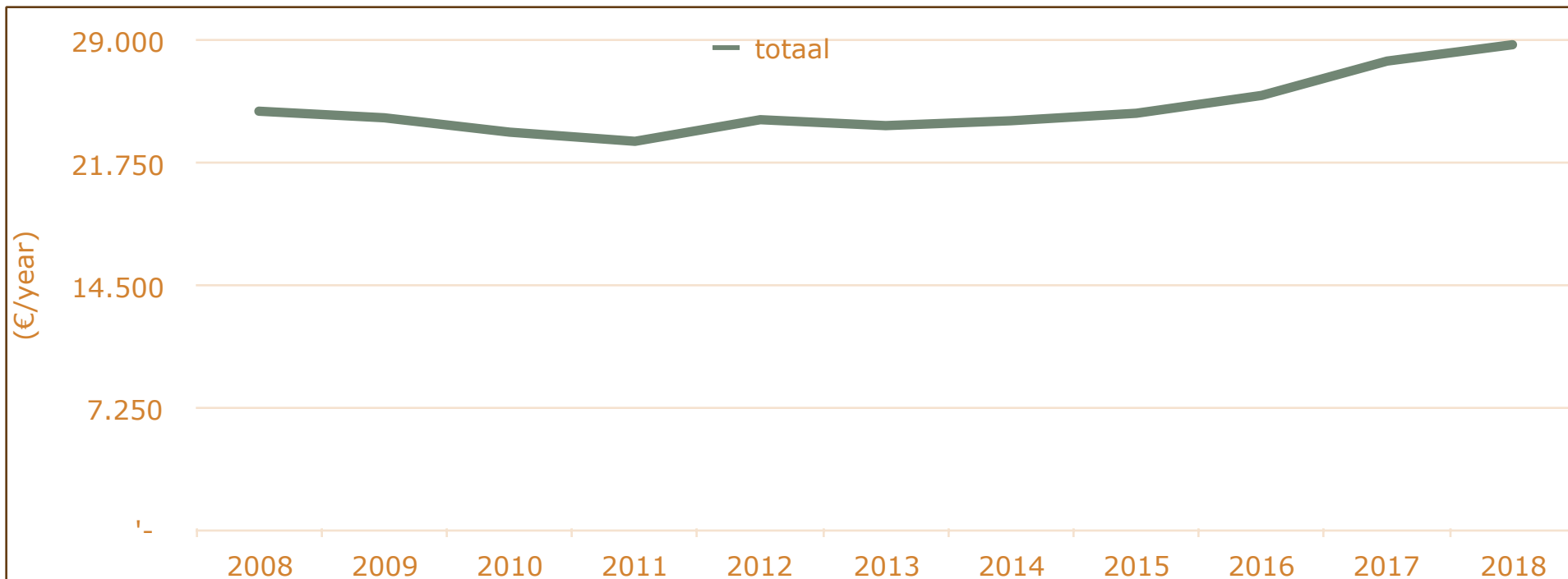


Modal shift potential (PL to NL)

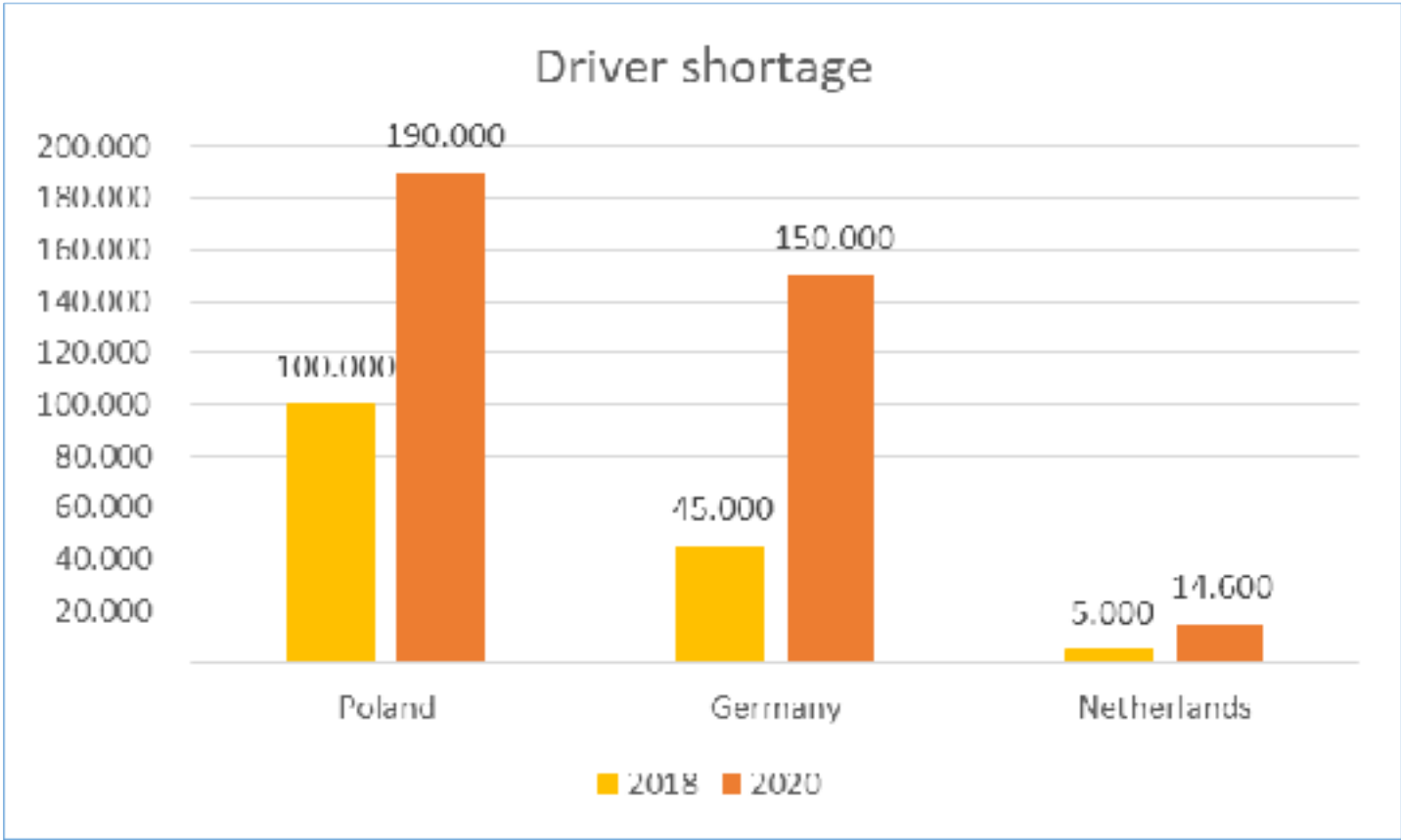


Total driver costs for Polish hauliers

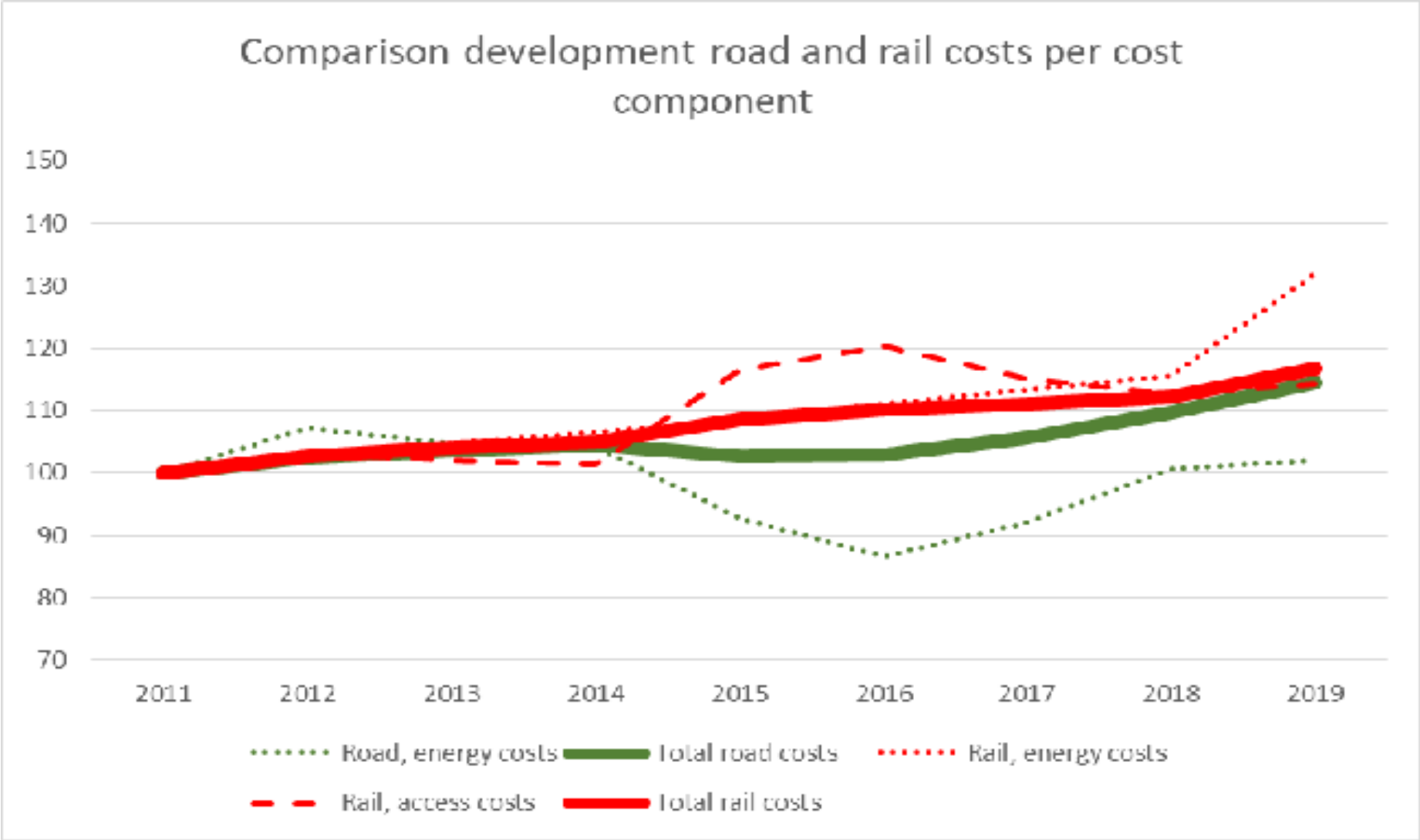
- 2008 = € 25000 (100%)
- 2018 = € 29000 (116%)



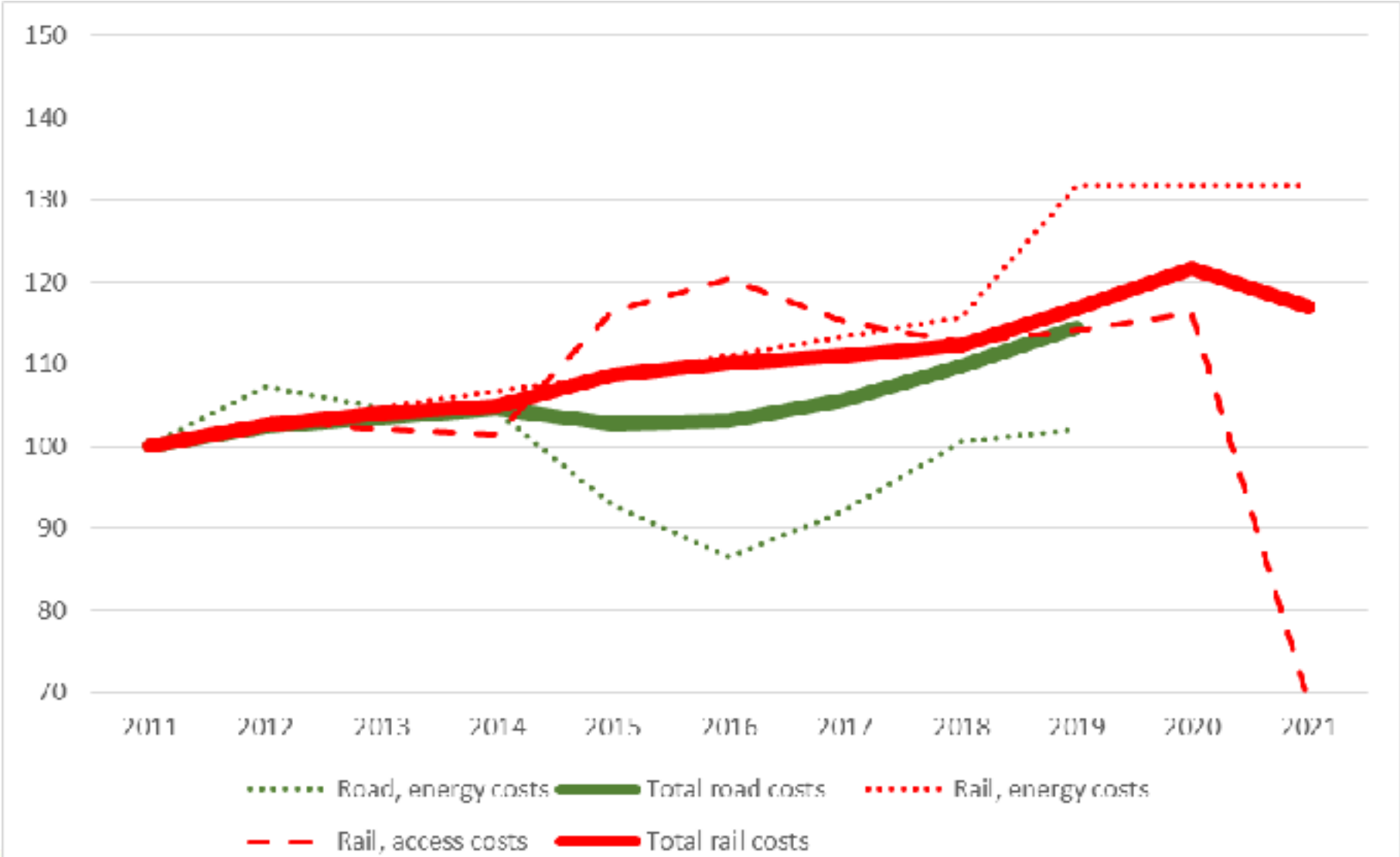
Driver shortage



Impact of the increase of energy costs in Poland at the total transport operation costs (Rotterdam – Poznan)



And the mitigation effect of the foreseen decrease of the track access charges in Germany and The Netherlands at the total transport operation costs (Rotterdam – Poznan)

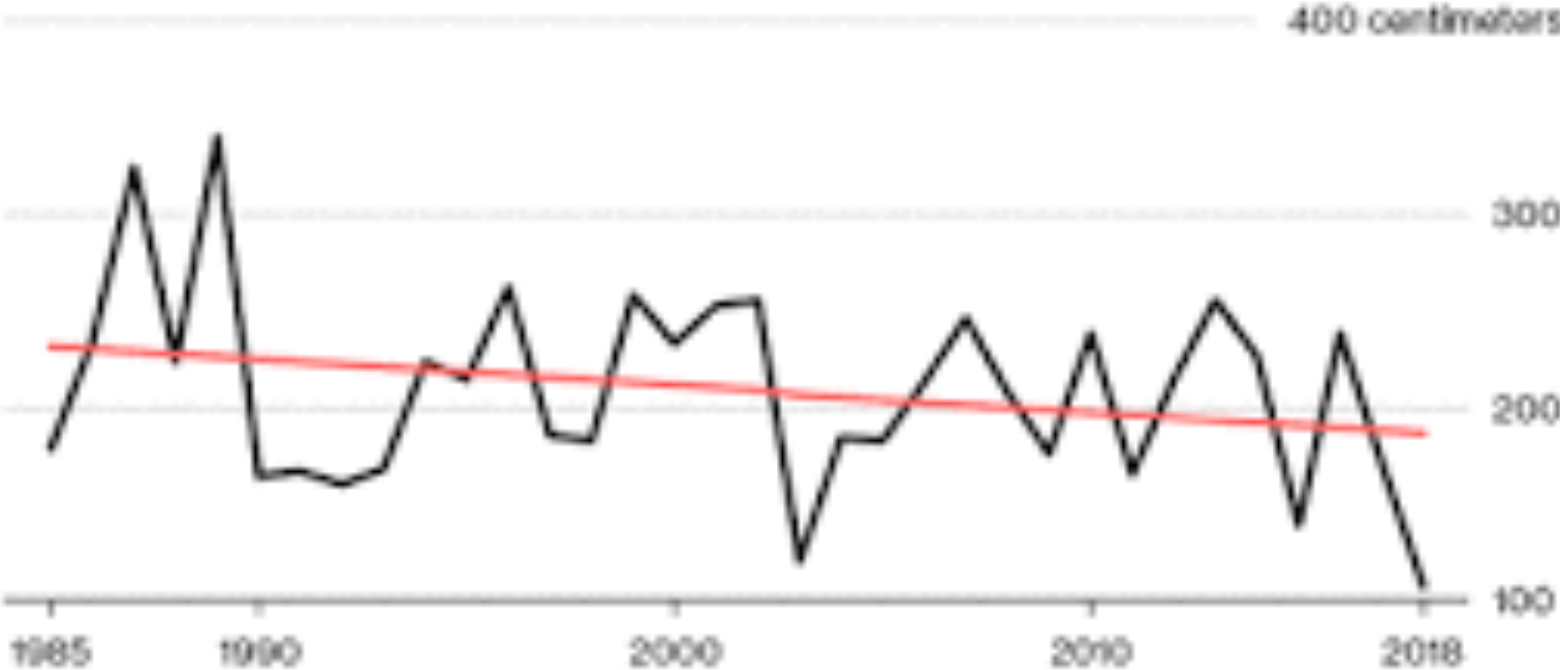


Impact climate change on water level Rhine (which will have effect on capacity Dutch railway network as cargo will shift from barge to rail)

Shallow Waters

The Rhine river has been receding as alpine glaciers at its source melt

Summer water levels Long-term trend



Source: Germany's Waterways and Shipping Administration (WSV)

* Average depth at Kaub in the dry season from June to November

CONCLUSION

- Potential to grow is already there
- And even more because of the improving competitive position of rail versus road
- And increasing possibilities such as BRI and/or BREXIT

Contact details

Thank you!

Adriaan Roest Crollius

a.roest.crollius@panteia.nl

06 2872 9231

