

ExBo Meeting – TAG window

17/03/2021, Teams

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easier, faster, safer

Agenda

1. Context and goals of the message of the TAG speakers
2. Importance of the Terminals and sidings (connection points)
3. Description of the Intermodal Terminal Survey
 1. Outcome: Terminal Infrastructure and network accessibility
 2. Outcome: Equipment, IT and Environment
4. Subventions Policies enhancing multimodal competitiveness
5. Conclusions

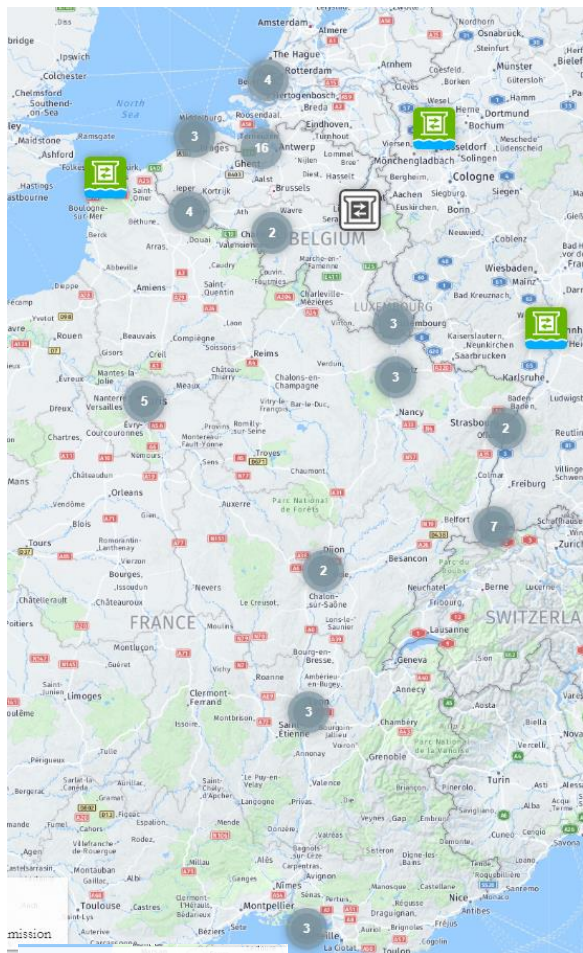
1. Context and goals of the message

- **EU & National policies** supports RU's and Infrastructure Manager's in different ways :
 - Green Deal
 - Recovery and Resilience Facility (RRF)
 - MFF (Horizon Europe, S2R), Next Generation Europe
 - Different national Masterplan
 - Reduction of TAC - 2020/1429
- **Enhancement of the capacity of the network** is a positive signal (SERA) and a need to absorb future volumes
- **Upgrade of current terminal capacities** is essential (handling equipment, Digitalisation etc)

TAG speakers want to show, based on a **Intermodal Terminal Survey** launched under the terminals of RFC2, that there is a huge **need of financial support** in order to fulfill the goals set by the EU & Member States:

- Terminals (Ports/CT) are not ready to cover future volumes
- Marshalling yards have to be modernised and upgraded
- Equipment is not "State of the Art"
- Existing aid programs are not designed for smaller entities like Terminal Operators

1. TAG Focus taking into account the variety of TERM



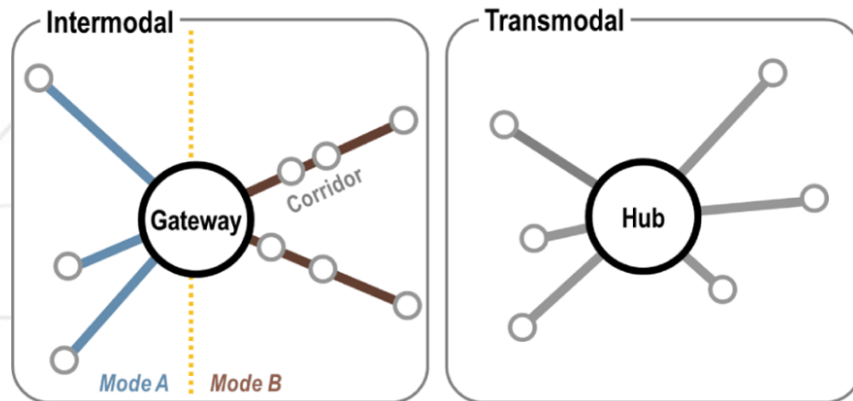
- Statement
- **Variety in functions of terminals**
 - Inland Freight Villages, Deep Sea Ports
 - SSS Ports, Inland Dry Ports, ROLA, Hinterland-Terminals
- **Variety in maturity**
 - From fully automatized down to paper & pen
- **Variety of national processes**
 - Country level but also local
- **Common Focus**
- **BUT shared willingness for focus on OPS (processes, technics) & DIGIT**
 - Measurement of quality
 - Share best practices in innovation (f.e. thermic versus electric/hydrogen tractors) and strategies
 - Standards in operations
 - Interfaces with corridor Infra & RU's
 - Data platforms

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2. Terminals are connection points

- Between modes of transport :
Rail, Road, IWW, DeepSea, SSS
- Large variety of functions and roles alongside the corridors



- They create value (AV) in their environment and alongside the corridor (services)
- They contribute to the performance of the corridors

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3. Intermodal Terminal Survey: Description



- Launched 10/03/2021
- Subjects:
 - Infrastructure
 - Equipment (in order to increase handling capacities)
 - IT
 - CO2 Footprint and decarbonisation
- Feedback
 - 6 of 39 Terminals participated in the survey

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3.1. Outcome: Infrastructure and accessibility



1. Infrastructure - terminal side: Currently, my terminal has enough capacity to accommodate a substantial increase (50%) in volume:

● Fully agree	2
● Agree	1
● Do not agree	2
● Do not agree at all	1



2. Infrastructure - private siding side: My siding has proper infrastructure to accommodate a substantial increase (50%) in volume:

● Fully agree	0
● Agree	3
● Do not agree	2
● Do not agree at all	1



3. If, not agree What should be upgraded in order to accommodate these volumes ?

● Make access to the terminal e...	0
● Investments to accommodate tr...	2
● Only invest in additional tracks	1
● Autre	0



Main topics & ranking

Terminal infrastructures are partly ready

Where not:

- Investments to accommodate trains of 740m
- Only invest in additional tracks

3.1. Outcome: Infrastructure and accessibility



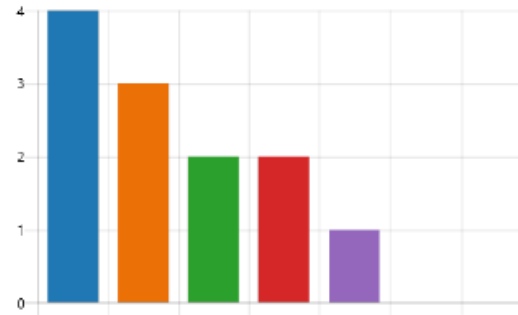
4. Infrastructure - connection to the network: My siding is properly connected to the public network in order to accommodate a substantial increase (50%) in volume:

● Fully agree	0
● Agree	2
● Do not agree	4
● Do not agree at all	0



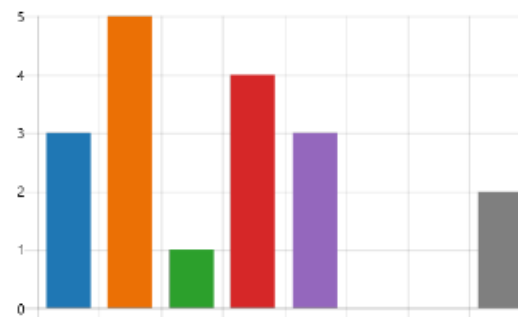
5. If, not agree What should be upgraded in order to ease the accommodation of these volumes ?

● Improve the capacity in bundl...	4
● Improve the availability of trac...	3
● Investments to accommodate tr...	2
● Improve operational communi...	2
● Improve commercial relations...	1
● Only invest in additional track...	0
● Autre	0



6. Infrastructure - support In order to accommodate more volumes, what do you need ?

● Improve communication with ...	3
● Improve the infrastructure con...	5
● Improve the visibility of the te...	1
● Improve cooperation with the ...	4
● Financial support in order to u...	3
● Nothing, there is no market d...	0
● I do not now, I do not underst...	0
● Autre	2



Main topics & ranking

- Improve cooperation with the Railway undertakings
 - Improve the infrastructure connection of the terminal with the public network
 - Financial support in order to upgrade the terminal facilities
-
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 - Financial support in order to upgrade the terminal facilities
-
- Improve the visibility of the terminal activities
 - Improve cooperation with the Railway undertakings
 - Improve communication with Infrastructure manager
 - Improve cooperation with CT operators
-
- Improve the infrastructure connection of the terminal with the public network
 - Financial support in order to upgrade the terminal facilities
-
- Improve communication with Infrastructure manager
 - Improve cooperation with the Railway undertakings
 - create legal certainty about the future of the railway connection (legal dispute with the infrastructure manager)
 - Improve the infrastructure connection of the terminal with the public network
-
- Improve communication with Infrastructure manager
 - Improve the infrastructure connection of the terminal with the public network
 - Improve cooperation with the Railway undertakings

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3.2. Outcome: Equipment, IT and Environment

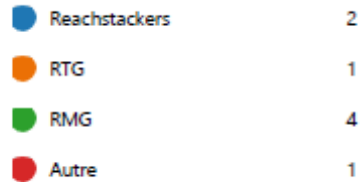
7. Equipment Do you currently consider investments in handling equipment ?



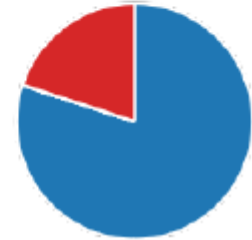
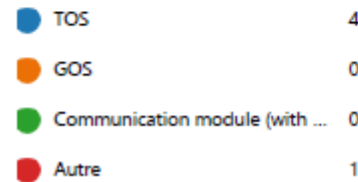
10. Operating systems Do you currently consider investments in the upgrade of your operating system (TOS, GOS,...) ?



8. Equipment If yes, which handling equipment do you consider?



11. Operating systems If yes, which kind of upgrade do you consider?



! High willingness and need of investments that have to be covered by the terminals!

Such investments are not foreseen in most of the supporting programs

- Risk of delays due to a lack of financial power
- Risk of a need to increase terminal rates -> against goals to attract the **shift to rail**

f.ex.

1 RMG	= 3.6 – 4.5 mil €
GOS	= 750 – 900 k€
TOS	= 750 k€ - open end

Compared to a large terminal and a turn over of 10 m€ per year

3.2. Outcome: Equipment, IT and Environment

14. Environmental footprint Do you currently consider the environmental footprint in your marketing campaigns?

- Yes, and I know exactly how t... 4
- Yes, but limited to a rhetoric a... 2
- No, because I do not know wh... 0
- No, because the market is not... 0



15. Environmental footprint: Do you believe your activities should be supported based on the environmental performance of the multimodal transport chains ?

- Yes 6
- No 0



Terminals are measuring and communicating on the environmental impacts.

In order to decrease these of course still negative impacts

- Terminals need direct support or
- Efforts should be valued and remunerated

Reachstackers:

1 thermal = 500 k€
1 Hybrid = 795 k€
Hydrogen still be shown to the market

Terminal Tractors

1 thermal = 120 k€
1 100% battery = 270 k€ depending on
number of batteries
Hydrogen still to be shown to the market

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Conclusions

- Marshalling yards and access to terminals are not ready
- Communication between terminals and infrastructure managers has to be improved (IT level/TAF TSI)
- Investments in IT are 1 important pillar in order to increase efficiency, capacity and transparency
- Supporting policies should take into consideration the needs of terminals
 - most of the terminal operators are smaller entities
 - Investments in new (and greener) equipment is a challenge
 - Green technologies are more expensive by a factor of 2,5

(* not limited to CT Terminals)

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