

Extension of the TENs and intermodal transport: two priority issues for transport development in S.E. Europe

George A. Giannopoulos

CHAIRMAN OF SETREF,
PROFESSOR AT ARISTOTLE UNIVERSITY OF THESSALONIKI,
TRANSPORT SECTION

This paper examines the prospects for two of the most urgent transport issues in S.E. Europe today, i.e., that of developing transport infrastructure, and of intermodal transport. For both issues a short background is given and then a set of proposed actions or "conditions of success" is presented. The work draws from a number of sources and references including the SETREF's reports and the results of a recent Conference in Intermodal Transport.

1 Introduction

South East Europe is a wide area of Europe which, in this article is considered as extending from Italy and Austria to the west to Turkey and the Black Sea in the East, and from Slovakia and Rumania in the North, to Cyprus and Crete (Greece) in the South. Two of the "hottest" issues concerning the transport situation in this area are considered by many to be the development of a coherent network of transport infrastructure compatible, and in essence forming extensions, to the EU's TransEuropean Networks (TENs) and the development of intermodal transport. As three of the TENs are road, rail, and intermodal networks these issues are of paramount weight to the future accession countries (i.e. countries which started negotiations for entry to the EU) but also to all countries in the area as all are practically under a pre-adhesion regime, or aspire to join such a regime in the near future.

The first guidelines for the development of the TransEuropean Transport Network (TEN) were established in 1994 (paper COM (94) 106) and sent to the Council and European Parliament in April 1994 where they were approved the same year. The real significance of the TEN notion lies in the fact that the EU attempts to describe a vision of how an integrated network should develop in Europe from 1995 to 2010 and beyond.

The guidelines for the Trans-European Road Network (TERN) provided for 56,000 km of high-standard motorways and road links across Europe. The plan fills in the present gaps between road systems and lays down the approach to developing a traffic management system. Overall investment required has been estimated in the region of ECU 140-180 billion. More than 70% of the necessary roads already exist, but 15,000 km of motorways or high quality roads are to be built in ten years, 40% of them in member states on the periphery of the Community.

The Railway Network will be based on a system of 70,000 kms of track carrying high speed trains and conventional passenger and freight services.

As regards now intermodal transport, this is on average responsible for 4-5% of the total freight moved within Europe on a yearly basis. It is estimated that daily some 6-7000 lorries are moved out of the streets and put on to the trains for a

very substantial part of their journey.

This is small percentage of share of the total market and for S.E. Europe it is even smaller. The only form of intermodal transport that has prevailed in the area is the less demanding Rollende Landstrasse and 20-foot maritime containers. The strong growth of the Rollende Landstrasse is a sign of the deficiencies rather than the strength of intermodal transport in Eastern Europe, as it reflects the lack of more sophisticated intermodal transport techniques.

Several studies and reports foresee a rapidly growing potential for intermodal transport in Europe in general. This however, may prove very difficult to achieve in S.E. Europe.

There are several reasons for this. First, it is the supply side. In Eastern Europe, intermodal transport followed a different line of development to that of intermodal transport in Western Europe: it was a monoculture of 20-foot-containers. Other load units, such as swap bodies, semi-trailers and 40-foot-containers, didn't exist. These 20 foot-units were distributed door-to-door by rail, without any competition from trucks. Second, after 1989, this inadequate supply was accompanied by an even more problematic demand from newly - established truck companies:

- The market structure of road transport became atomistic - made up of numerous small and middle-sized Eastern European companies which were not able to meet the organisational or technical requirements of intermodal transport. The policy conclusion should be to offer these companies "easy-in easy-out" opportunities for intermodal transport. Market entry and market exit should be possible at low investment costs.
- Furthermore, the companies lack experience and -even more importantly - equipment for intermodal transport, such as portable semi-trailers, swaps and chassis.

As a consequence of these demand and supply-side problems, intermodal transport in S.E. Europe is still in its infancy, but this also means that there is a lot that can be done in the near future. This paper attempts to investigate what are the necessary actions.