



**Barrières au Développement du  
Fret Ferroviaire Transmanche  
Séminaire CIG 9 Octobre 2014**

# Efforts de Développement

## Eurotunnel efforts for cross-Channel Rail Freight

- **Introduction of Cross-Channel Open Access in 2007**
  - simplified toll per train with equality of access for all RUs
  - guaranteed open access to frontier essential services at efficient cost
  - price freeze on CT tolls from 2007 to 2013 (-16% vs. inflation)
- **Intervention at Frethun to ensure efficient Open Access**
  - EP offering ground OA services since Fret SNCF exit in 2007
  - ET intervention to remove RFF Security Surcharge in 2014
  - further efforts to develop SLAs for efficiency & Customer trust
- **ETICA incentive to boost development of new services**
  - launched 2013 to assist start up costs of new intermodal services
  - extended in 2014 to 5 new categories of traffic & open until 2018
  - reinforced with 25% reduction in night-time tolls & 5 year freeze
  - ET objective to double rail freight to 5000 trains/year by 2018
- **Traffic growth objectives require removal of non-tariff barriers**
  - ET efforts are delivering double-digit growth in CT Rail Freight
  - Eurotunnel keen to participate in discussions with stakeholders to resolve barriers to development

# Barrières au Développement

## Identification of top 10 BaD

- **Top 10 Barriers against Development of CC RF:**
  - 1. Restricted UK loading gauge** (Kent CT Route)
  - 2. Technical differences/restrictions** (other Member States)
  - 3. Non-standard electrification on Kent CT Route** (loco)
  - 4. Cost & disruption of security inspections at UK frontier**
  - 5. Scarcity of UK paths to Midlands & Northwest** (WCML)  
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  - 6. UK domestic network focus on deep sea vs. EU freight**
  - 7. Reliability issues from strikes & path cancellations** (FR)
  - 8. Negative media coverage on perceived difficulty/cost**
  - 9. Non-authorisation in France of specialist loco** (C92)
  - 10. Unavailability of UK specialist wagons** (automotive, ...)

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## BaD.1 - Restricted UK loading gauge

### ● Kent Channel Tunnel Route

- essential for access to WCML for Midlands & Northwest
- used for >90% of CT markets & traffic
- offers capacity for over 70 trains/day (>35paths/day each way)
- remains limited to smaller UK gauge (W9) vs. CT (>UIC-C)
- requires low platform wagons and/or smaller boxes

### ● Impact 1: reduced number of containers

- loading inefficiency of low platforms wastes **20%** of capacity
- loss of revenue = **-2500€/train** (UKFR) to **-5000€/train** (UKIT)
- over 20 years of Fixed Link = **200M€** of lost revenue for RUs

### ● Impact 2: reduced size of container/swap body/trailer

- **W9 only allows** S32 swap body on 945mm deck, S44 on 825mm
- standard S45 **not allowed** except by special individual authorisation
- standard piggyback P400 **market closed** for Channel Tunnel
- high cube boxes **only allowed** to East-London via HS1

### ● Impact 3: increased cost of wagons

- leasing cost of Megafret wagon **>40%** higher than standard wagon
- increased cost = **+500€/train** to **+1000€/train** for RUs

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## BaD.2 – Other technical differences/restrictions

- **Train length restrictions**
  - EU standard = 750m
  - Fixed Link = 750m
  - Germany = 600m (=> loss of 25% extra)
  - Italy = 550m (=> loss of 36% extra)
  - Spain = 400m (86%, but longer on certain lines, or coupled at border)
- **Impact: shorter trains = reduced number of containers**
  - depending on length limits, capacity loss ranging from 20% to 40%
  - loss of revenue for -20% capacity = -2500€/train to -5000€/train
- **Maximum tonnage restrictions**
  - limits on Alpine crossings depend on gradient & number of locomotives
  - limits on other networks depending of nb. locomotives & performance

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## BaD.3 - Non-standard electrification of Kent CTR

### ● Kent Channel Tunnel Route 750V DC electrification

- Fixed Link & HS1 electrified at 25kV AC 50Hz OHC standard
- main electrification in South-East UK network is 750V DC 3<sup>rd</sup> rail
- requires specially adapted locomotive for very unique system
- only Class 92 specially designed for this supply (& other standards)
- standard TSI locomotives authorised in Fixed Link since 2012
- only Kent CT route electrification prevents use of standard TSI locos

### ● Impact 1: additional cost of locomotive

- additional purchase/leasing cost **+25%** for 750V DC capability
- additional cost for original Class 92 fleet = **+23M€** (=46 x 500k€)
- additional leasing cost = **+300€/train** to **+600€/train** (1xC92/2xC92)

### ● Impact 2: additional cost of operations cross-border

- short routes from UK to Northern France (Lille) require traction change
- highly inefficient use of 2 traction units & loss of time at border
- additional operating cost = **+1200€/train** or **>+50€/box**

### ● Impact 3: other impacts on market

- specialised fleet now 20 years old into 30 year life
- => risk of obsolescence & non-renewal => **all diesel through Kent 2024?**
- lack of standard locos is a **deterrent to CT traction market entry**



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## BaD.4 - Cost & disruption of UK frontier security

### ● Frethun security surcharges & frontier costs

- RFF compulsory security surcharge of **600€/train** introduced in 2012
- ET intervention in 2014 allowed **removal of 600€/train** RFF surcharge
- SNCF catenary earthing surcharge of **1000€/train** top-loaded wagons
- **no assistance from authorities** for Frethun Frontier costs on ET & RUs
- extreme **pressure on resources** at Frontier from clandestine crisis

### ● Frethun yard disruption

- **zero closure for RU industrial action** since EP arrival in Nov-2007
- RFF subcontractor strike = **1 week closure** of frontier yard (Feb-2014)
- RFF catenary reconfigurations = **multiple night closures** of frontier
- need to develop SLAs for security interventions by Douanes

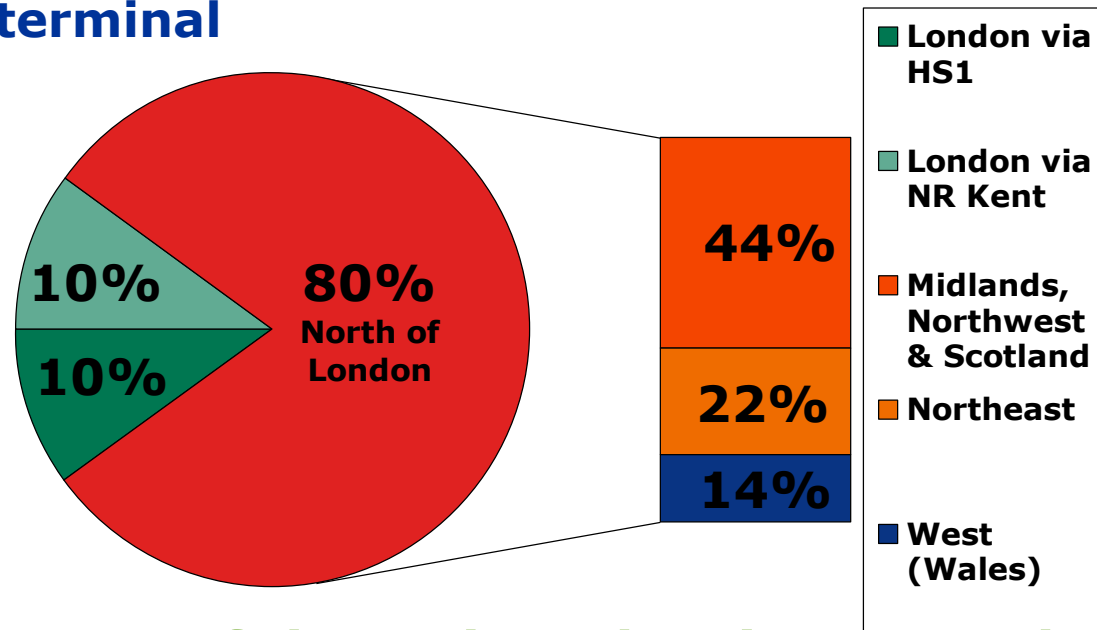
### ● Costs & disruption from avoidable Dollands Moor stops

- DM stop superfluous for non-stopping trains from secure terminals
- requirements can be satisfied through ad-hoc stops
- Terminal vetting process (“directions”) should be fast & efficient

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## BaD.5 - Paths to Midlands & Northwest (WCML)

- **Midlands & Northwest are main markets for CT intermodal**
  - **Daventry, Hams Hall...**
  - **Trafford Park, Widnes...**
  - **...Mossend Euroterminal**



- **Need for development of through paths via WCML through Kent CT Route to the Fixed Link**
  - **small available reserve to accelerate development timeframe**