



## Introduction

The European Commission (Directorate General for Mobility and Transport) is planning a possible amendment to Directive 92/106/EEC on the establishment of common rules for certain types of combined transport (CT) of goods between Member States.

To support the elaboration of the amendment proposal and the assessment of the impacts thereof, the Commission has contracted TRT Trasporti e territorio (IT) and MDS Transmodal (UK) to conduct a survey among operators and stakeholders to gather further data on CT operations in the EU and in all Member States.

The survey focuses on the transshipment operations and on the costs of CT compared with the all road solutions, with a view to develop effective support measures for the combined transport.

Your participation in this online survey is important to ensure that the European Commission is able to prepare the most appropriate amendment proposal to support the European CT sector, based on a comprehensive data set.

The reference year for the survey is 2015 and so, wherever possible, please provide data for the 2015 calendar year. Where that is not possible, please provide data for your most recent financial year.

## Definitions

**COMBINED TRANSPORT<sup>1</sup>** is defined as intermodal freight transport within the European Union using at least two modes of transport from which one is road transport and the other is rail, inland waterways (IWW) or short sea shipping (SSS). Combinations of road transport with ocean going maritime transport and air transport are not covered.

**TRANSHIPMENT** is any operation transferring a loading unit (for example a container, swap body, trailer or semi-trailer) from one mode of transport to another without loading/unloading the goods to/from the loading units. The number of transshipments are therefore the number of transfers of the loading unit between modes irrespective of the number of moves made during the transfer. For example, transferring a container from a ship to a lorry at a container terminal would count as one transshipment even if the container is first moved to storage in the terminal and then to a lorry.

All responses that you will provide to this questionnaire will be used only for statistical elaborations. Your individual responses as well as your personal details will never be published or reported.

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<sup>1</sup> According to the Directive 92/106/EEC (Art. 1), "combined transport means the transport of goods between Member States where the lorry, trailer, semi-trailer, with or without tractor unit, swap body or container of 20 feet or more uses the road on the initial or final leg of the journey and, on the other leg, rail or inland waterway or maritime services where this section exceeds 100 km as the crow flies and make the initial or final road transport leg of the journey:

- between the point where the goods are loaded and the nearest suitable rail loading station for the initial leg, and between the nearest suitable rail unloading station and the point where the goods are unloaded for the final leg, or;
- within a radius not exceeding 150 km as the crow flies from the inland waterway port or seaport of loading or unloading."



Introduction

Identification

Essential information is marked with an asterisk (\*)

## Identification

Name of organisation \*

Contact name \*

Address/Country

Contact email address \*

Telephone number

Industry sector \*

  
  
  
  

- |   |   |   |
|---|---|---|
| <input type="radio"/> Terminal Operator | <input type="radio"/> Freight Forwarder / Logistics company - 3PL | <input type="radio"/> CT Operator Multimodal Transport Operator |
| <input type="radio"/> Shipping Line     | <input type="radio"/> Road Transport Operator                     | <input type="radio"/> Other                                     |

Modes of CT used/managed \*

- |                                      |                                     |                                     |
|--------------------------------------|-------------------------------------|-------------------------------------|
| <input type="checkbox"/> Rail / Road | <input type="checkbox"/> IWW / Road | <input type="checkbox"/> SSS / Road |
|--------------------------------------|-------------------------------------|-------------------------------------|

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Identification

**Rail / Road**

## Rail / Road

**1. How many transhipments do you carry out by the Rail / Road mode?**

0

**2. In which countries do you operate by the Rail / Road mode?**

- |  |                                       |   |  |
|--|---------------------------------------|---|--|
| <input type="checkbox"/> AT - Austria        | <input type="checkbox"/> EE - Estonia | <input type="checkbox"/> IE - Ireland     | <input type="checkbox"/> PL - Poland         |
| <input type="checkbox"/> BE - Belgium        | <input type="checkbox"/> EL - Greece  | <input type="checkbox"/> IT - Italy       | <input type="checkbox"/> PT - Portugal       |
| <input type="checkbox"/> BG - Bulgaria       | <input type="checkbox"/> ES - Spain   | <input type="checkbox"/> LT - Lithuania   | <input type="checkbox"/> RO - Romania        |
| <input type="checkbox"/> CY - Cyprus         | <input type="checkbox"/> FI - Finland | <input type="checkbox"/> LU - Luxembourg  | <input type="checkbox"/> SE - Sweden         |
| <input type="checkbox"/> CZ - Czech Republic | <input type="checkbox"/> FR - France  | <input type="checkbox"/> LV - Latvia      | <input type="checkbox"/> SI - Slovenia       |
| <input type="checkbox"/> DE - Germany        | <input type="checkbox"/> HR - Croatia | <input type="checkbox"/> MT - Malta       | <input type="checkbox"/> SK - Slovakia       |
| <input type="checkbox"/> DK - Denmark        | <input type="checkbox"/> HU - Hungary | <input type="checkbox"/> NL - Netherlands | <input type="checkbox"/> UK - United Kingdom |

select / deselect all countries

**3. What is the average number of transhipments per door-to-door transport operation?**

- 1
  2
  3 or more

**4. What is the average cost of transhipment for your company?**

Average value in euro

0

**5. Please provide the average cost of transhipment in the countries where you operate.**

*Please choose a country in question [2](#)...*

AT - Austria	Average value in euro	0
BE - Belgium	Average value in euro	0
BG - Bulgaria	Average value in euro	0
CY - Cyprus	Average value in euro	0
CZ - Czech Republic	Average value in euro	0
DE - Germany	Average value in euro	0
DK - Denmark	Average value in euro	0
EE - Estonia	Average value in euro	0
EL - Greece	Average value in euro	0
ES - Spain	Average value in euro	0
FI - Finland	Average value in euro	0
FR - France	Average value in euro	0
HR - Croatia	Average value in euro	0

HU - Hungary	Average value in euro	0
IE - Ireland	Average value in euro	0
IT - Italy	Average value in euro	0
LT - Lithuania	Average value in euro	0
LU - Luxembourg	Average value in euro	0
LV - Latvia	Average value in euro	0
MT - Malta	Average value in euro	0
NL - Netherlands	Average value in euro	0
PL - Poland	Average value in euro	0
PT - Portugal	Average value in euro	0
RO - Romania	Average value in euro	0
SE - Sweden	Average value in euro	0
SI - Slovenia	Average value in euro	0
SK - Slovakia	Average value in euro	0
UK - United Kingdom	Average value in euro	0

**6. How many transshipments do you carry out in total in the Member States where you operate?**

**The sum of your answers to question 6 should equal the answer for your total CT movements in Question [1](#).**

*Please choose a country in question [2](#)...*

AT - Austria	Total number of transshipments	0
BE - Belgium	Total number of transshipments	0
BG - Bulgaria	Total number of transshipments	0
CY - Cyprus	Total number of transshipments	0
CZ - Czech Republic	Total number of transshipments	0
DE - Germany	Total number of transshipments	0
DK - Denmark	Total number of transshipments	0
EE - Estonia	Total number of transshipments	0
EL - Greece	Total number of transshipments	0
ES - Spain	Total number of transshipments	0
FI - Finland	Total number of transshipments	0
FR - France	Total number of transshipments	0
HR - Croatia	Total number of transshipments	0

HU - Hungary	Total number of transhipments	0
IE - Ireland	Total number of transhipments	0
IT - Italy	Total number of transhipments	0
LT - Lithuania	Total number of transhipments	0
LU - Luxembourg	Total number of transhipments	0
LV - Latvia	Total number of transhipments	0
MT - Malta	Total number of transhipments	0
NL - Netherlands	Total number of transhipments	0
PL - Poland	Total number of transhipments	0
PT - Portugal	Total number of transhipments	0
RO - Romania	Total number of transhipments	0
SE - Sweden	Total number of transhipments	0
SI - Slovenia	Total number of transhipments	0
SK - Slovakia	Total number of transhipments	0
UK - United Kingdom	Total number of transhipments	0

**7. Please consider the organisation of a new combined transport route. It involves incurring set-up costs including, for example, the cost of additional management/staff time, consultancy fees for market analysis, capital costs required to adapt equipment, negotiating agreements with other operators. What is the estimated total cost of setting up a new combined transport route?**

Total cost estimated in euro \_\_\_\_\_ 0

**8. What is the average difference in percentage terms in the total cost of a combined transport operation per shipment, compared to a road only transport operation? (CT vs all Road)**

< -10%     -10 / -5%     -5 / +5%     +5 / +10%     > +10%   

**What is the average cost per shipment of organising a new CT route, excluding the actual cost of transport? Euro/shipment**

< 50 euro     50 / 100 euro     100 / 200 euro     > 200 euro

**9. The use of combined transport solutions may imply a longer door-to-door transit time compared to the all road option. Please estimate the average cost of this additional time and the average additional time required per shipment?**

Average value in euro \_\_\_\_\_ 0  
Average additional time in hours \_\_\_\_\_ 0

**10. Do the CT operations allow you to track and trace the shipment?**

Yes  No

**If not, what is the estimated cost per year or per shipment of the lack of information for your company?**

Cost in euro / year \_\_\_\_\_ 0  
Or  
Cost in euro / shipment \_\_\_\_\_ 0

**11. Do you suffer from a lack of harmonisation of procedures or documents used in CT operations in the various countries in which you operate?**

Yes  No

**If yes, how much does the non-harmonisation of procedures or documents used in CT operation cost your company?**

Cost in euro / year \_\_\_\_\_ 0  
Or  
Cost in euro / shipment \_\_\_\_\_ 0

**If you have faced some specific problems related to the non-harmonisation, please describe them (please include in which MS the problem occurs)**

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**12. Do you suffer from using paper documents instead of e-documents?**

Yes  No

**How much does the use of paper-based documents instead of e-documents cost your company?**

cost in euro / year or euro / shipment \_\_\_\_\_ 0

**If you faced some specific problems related to the use of paper-based documents, please describe them (e.g. relevant delay owing to paper-based documents, etc.)**

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**13. There are different distance thresholds beyond which combined transport is considered to be cheaper than all-road transport. What, in your experience, is the break-even distance for door-to-door CT transport (assuming no public sector support for CT)?**

Km \_\_\_\_\_ 0

**14. Is there any public sector support in the country(ies) you operate in (either direct subsidy or**

in the form of a tax reduction) for the use of CT?

Yes

No

clear

If yes, what would be the break-even distance with this public support?

km

0

15. Do you use electronic documents in your information systems to manage your CT shipments?

Yes

No

clear

If yes, how much did it cost to update your software?

Average value in euro

0

If not, please give us an estimate of the likely future cost to introduce it in your company.

Average value in euro

0

16. Directive 92/106 introduced some specific rules for companies transporting goods on own account (i.e. transportation of goods by the buyer or seller of the goods rather than using a 3rd party transport operator).

Are you aware of these rules?

Yes

No

clear

Do you think or know that they are used?

Yes

No

clear

Can you estimate the number of companies using the rules on own-account transport in your country, according to Directive 92/106?

0

Please describe practical cases you are aware of (specifying in which countries)

17. Art. 4 of Directive 92/106 introduced some exemptions to the road haulage cabotage rules that are apply to CT chains; it allows operators to carry out the road legs of CT chains in another member state of the EU without the restrictions that otherwise apply to road haulage cabotage.

Are you aware of these rules?

Yes

No

clear

Do you think or know that they are used in the country(ies) you operate in?

Yes

No

clear

Can you estimate the number of companies using the exemptions on cabotage, according to Directive 92/106?

0

Please describe practical cases you are aware of (specifying in which countries)