

MOTORWAYS OF THE SEA AND ROLLING HIGHWAYS: FROM THE USERS' POINT OF VIEW



Plan

- A bit of context... Who's who?
- A bit of context... Aims of the study
- Methodology: a study in two phases
- Presentation of the existing services
- Lessons learned from the interviews
- Carriers expectations for both services evolutions
- Conclusion
- Questions

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A bit of context... Who's who?

- Bound to the French General Directorate for Transport, Infrastructures and the Sea of the Ministry for Energy, Ecology, Sustainable Development and Regional Planning (MEEDDAT/DGITM)
- Written by:
 - Scientific and Technological Network of the Ministry (*Réseau Scientifique et Technique*): CETE Lyon, CETE Méditerranée, CETE Ouest, and Sétra;
 - Altermodal/Indiggo (private businesses).

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A bit of context... Aims of the study

- Growing interest of the EU about environmentally friendly transportation modes ⇒ the DGITM needed to understand:
 - how and under which conditions a road carrier would be ready to use a motorway of the sea or a rolling highway;
 - Get an overview of present users needs to improve and develop services.
- Hypothesis: motorway of the sea's or rolling highway's success is conditioned by several factors and the willingness of road carriers.

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Methodology: a study in two phases

- A bibliographical analysis:
 - Carriers' interest is clear if the service is attractive: fares, transit time, quality of service, etc.
 - Carriers are sensitive to the organizational aspects of the supply chain: pre- and post-transport distances, social regulation, etc.
- User's interviews:
 - 12 users of the Alpine rolling highway (*Autoroute ferroviaire alpine, AFA*)
 - 10 users of the Motorway of the sea Toulon-Rome (*Autoroute de la mer Toulon-Rome, AMTR*)

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Existing services

- **Alpine rolling highway (AFA)**

- between Aiton (Chambéry) and Orbassano (Turin)
- 4 roundtrips per day
- average transit-time: 3h45

Aiton

Orbassano

Toulon

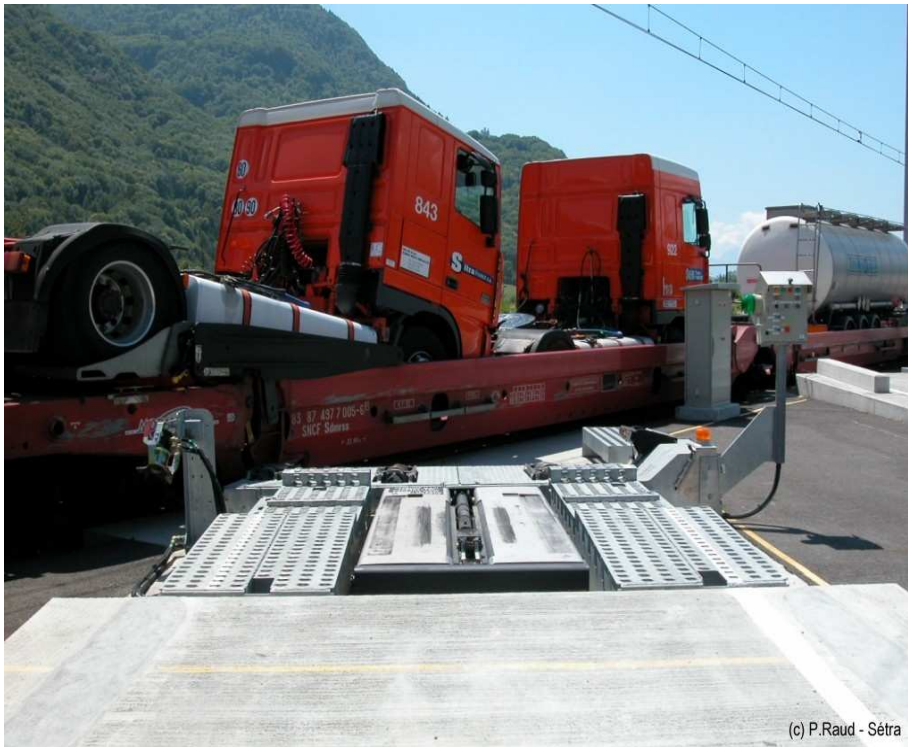
Civitavecchia

- **Motorway of the sea Toulon-Rome (AMTR)**

- between Toulon and Civitavecchia harbours
- 1 round-trip, three times a week
- average transit-time: 14h30 (at night)

Source : Sétra

Existing services



Modalohr railcars at Aiton railyard

Ro-Ro ship in Toulon harbour



Source : CETE Méditerranée



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Lessons learned from the interviews (1/5)

Transport service demand

- Road carriers companies size variable;
- All have regular and planned transport flows (industrial);
- Volume and usage frequency varies;
- Different Origins/Destinations:
 - AFA: mostly regional transport;
 - AMTR: large hinterland in France, mostly in Lazio and Campania regions in Italy.
- Flows are not necessarily balanced each ways.

Lessons learned from the interviews (2/5)

Accompanied or unaccompanied transport services?

- AFA or AMTR use, usually completes other all-road services;
- Unaccompanied transport is economically relevant;
- Before using unaccompanied service, carriers start with accompanied cargo;
- Unaccompanied transport is generally linked to short pre- and post-transport trips.

Lessons learned from the interviews (3/5)

Unaccompanied transport solution

- Organized mostly by large carriers companies who can:
 - have large volumes of cargo and regular flows;
 - own a large amount of semi-trailers;
 - partner with foreign companies or open subsidiaries abroad.

- Organization depends on every carrier

Lessons learned from the interviews (4/5)

Accompanied transport solution

- Accompanied transport solution is still used by most carriers, mainly because of:
 - its flexibility;
 - easier organization;
 - lower costs (rest-time for drivers, better transit time compared to the road, etc.);
 - On AFA, accompanied transport is often part of an unaccompanied organization.

Lessons learned from the interviews (5/5)

Choice criterias: accompanied or not?

- Cost cuts: salaries, fuel expenses, transport services fares, special regulations (44 tons trucks);
- Driving time and drivers' working hours management
- Road safety;
- On-time performance, service reliability and quality;
- **However, environmental considerations are not really taken into account!**

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Carriers expectations for both services evolutions

- Actual users are globally satisfied with the existing services.
- Improving AFA service:
 - Increasing frequencies;
 - Modifying schedules (morning especially);
 - Adding a new terminal in the Greater Lyon area.
- Improving AMTR service:
 - Increasing frequencies;
 - Improve the quality of service in Civitavecchia harbour;
 - Communicate and advertise about the service.

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Conclusion

- Diversité des organisations mises en place par les utilisateurs des services
- TA, TNA et mode routier utilisés de façon complémentaire
- Bon niveau de satisfaction pour les services actuels, mais souhait de fréquences accrues
- Déficit de communication sur la performance de ces modes alternatifs

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Thank you

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The complete report « *Autoroutes maritimes et ferroviaires : critères de choix par les entreprises pour le transport non accompagné* » is available online on Sétra's website:

<http://www.setra.developpement-durable.gouv.fr/Autoroutes-maritimes-et.html>