



PRIORITY 6

SUSTAINABLE SURFACE TRANSPORT

MTCP

Maritime Transport Coordination Platform

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QUALITY & EFFICIENCY

Terms of Reference Intermodal Loading Units

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TERMS OF REFERENCE
FOR A STUDY ON MARKET TENDENCIES AND TRADE FLOWS OF
CONTAINERS AND SWAP BODIES

I. Objectives of the study

The objective of this study is to analyse, assess and evaluate the market tendencies and trade flows of intermodal loading units (i.e. containers and swap bodies) and of the corresponding vessel fleets in Europe.

II. Scope of the study

1) Market tendencies and trade flows of containers and swap bodies

Based on available data and justified estimations, the study shall give a clear picture on the market tendencies of the types of intermodal loading units used in Europe.

Particular attention shall be paid to the land and waterborne trade routes according to the type of intermodal loading unit used.

2) Analysis and market tendencies of vessel fleets

The study shall give a clear picture of the deep sea, short sea shipping and inland waterway vessels market and its tendencies in the context of the transport of intermodal loading units.

In short sea shipping particular attention shall be given to Ro-Ro, Lo-Lo and combined Ro-Ro/Lo-Lo operations:

- analysis of the differences between Ro-Ro and Lo-Lo vessels with new cell-guides;
- whether modifications of the vessels are necessary in order to accommodate European Intermodal Loading Units as per the Commission proposal for a Directive on Intermodal Loading Units COM(2004) 361, including a cost-benefit analysis.

In inland waterways the analysis should focus on the barge type, in particular on the latest generation of Rhine barges: dimensions, guides/frames, different length combinations.

III. Expected results, conclusions

- Summary of findings
- Eventually, concrete proposals to be taken into account in the legislative procedure leading to the adoption of COM(2004) 361 in Council and European Parliament

IV. Method

The study shall comply with the conditions on the contract, to which these Terms of Reference are attached.

The contractor shall gather the necessary data and information from sources outside and inside the European Union institutions. The contractor shall carry out the relevant analyses of that data and draw justifiable conclusions or make justified evaluations.

The contractor shall present the data in an understandable format .The main issues (such as technical and infrastructure constraints) shall be clearly listed.

V. Budget

Approximately € 48.000,- at rate costs + 20% overhead.

This will allow approximately 70 man days.

VI. Team

The study requires distinctively different types of expertise:

1. The ability to carry out the relevant study related to forecasting trade development in commodities suitable for “unitisation” and assessing the market tendencies for different types of load units
2. The ability to perform an analysis of the existing short sea shipping fleet in Europe and market tendencies of vessel fleets related to carrying unit loads
3. The ability to extract relevant conclusions from the two studies and propose issues that should be considered in the relevant legislative procedures

Regarding the study of trade flows of load units BMT Transport Solutions will be involved, building on other relevant MTCP studies that already have been undertaken (2.1.18 being one example). BMT Transport Solutions is presently also involved in a study for DG TREN assessing the impact of security threats to European transport flows and has recently finalized a major study of future capacity in European north-south transport corridors (c.f. www.bmt-ts.com). References also include a large number of market assessments for ports and shipping lines in the Baltic and the North Sea.

Regarding the analysis of vessel fleet and related issues, LogIT will undertake this part of the study, supported by Håkon Lindstad of MARINTEK, who has substantial and relevant background information and who has been involved in similar studies.

In addition to having been jointly involved in a number of EU projects that have provided applicable expertise, the following list of reference activities should indicate the relevance of our joint expertise.

- Project involving the major Norwegian industrial companies with focus on developing total Intermodal door-to-door logistics solutions from the production sites along the Norwegian coast to customers in Europe.
- Different lobbying projects to promote sea transport and get more fair terms compared to rail and truck transport in Norway
- New port and distribution structure for Norske Skog (Global paper producing company) with focus on both reduced cost and the use of more sea transport, inland waterways and rail transport
- Outbound logistics solutions for Fjord Seafood and Domstein (Major White and Salomon fish companies) both for European and Worldwide distribution)
- Study done for the Coastal Department and the Norwegian Ship-owners Association regarding the real competition between truck, rail, sea in the Norwegian freight market and to and from Norway.

- Mapping of sea transport with focus on cargo types, sea transport modes (Ro-Ro, Lo-Lo, Side Port, Break Bulk, Dry bulk, Wet Bulk) to and from the Oslo Fjord ports, study done for Norske Skog Logistics
- Development of an innovative vessel concept for inland waterways with focus on transport of road units, trailers, heavy machinery and containers and swap bodies (Combilog)
- Consultancy work to summarize the output of earlier and ongoing initiatives to move traffic from road to sea and to strengthen the west coast sea transport corridor.
- Dry bulk, Cement and container trades in the Caribbean Area and between South America and USA/Canada
- SeaChains - Major project funded by Norwegian Research Council to develop a toolbox kit and a reference model for comparative analyses of logistics chains and the competition between different solutions. For example containerization of bulk products versus traditional bulk transport. Also new car transport in containers versus on specialized RoRo vessels
- Pre Feasibility Study - New Intermodal Logistics solutions in the Mekong Delta, Vietnam