

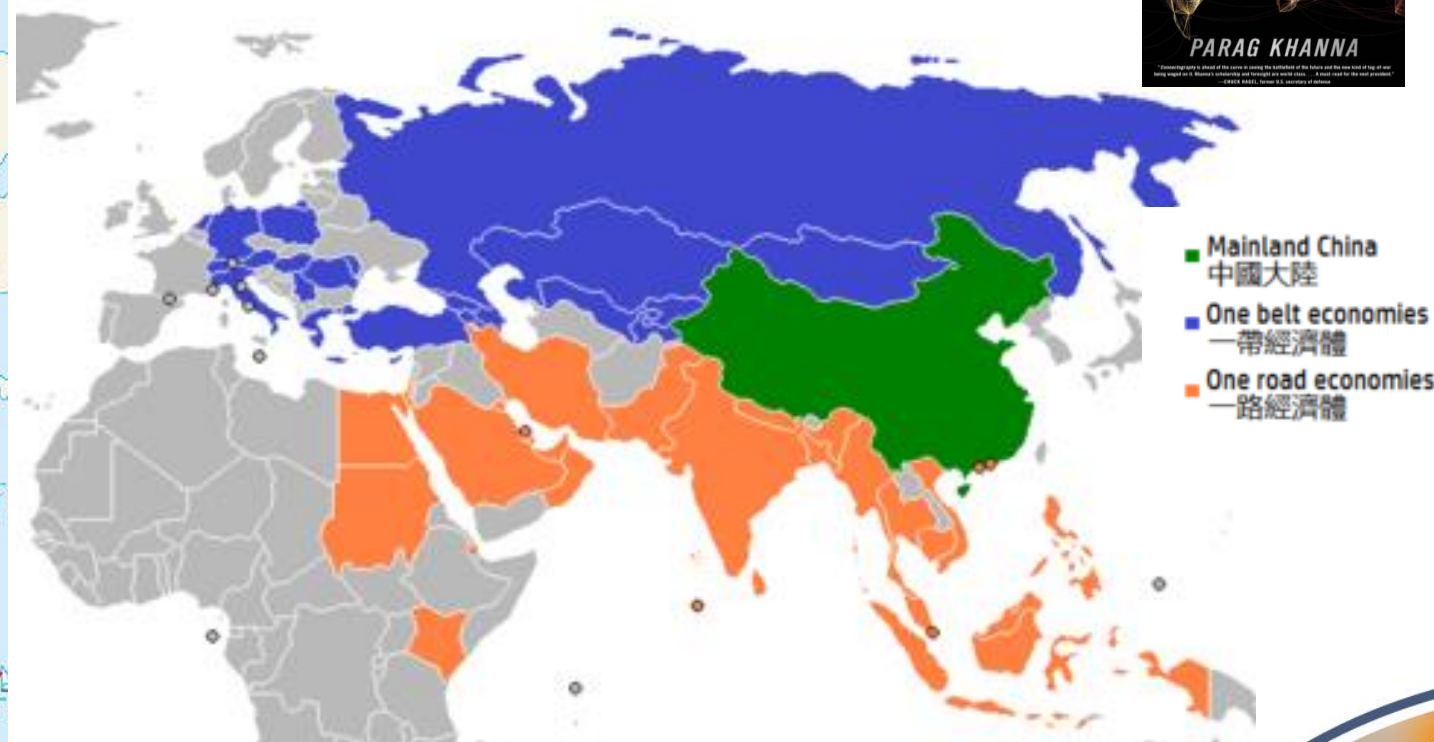
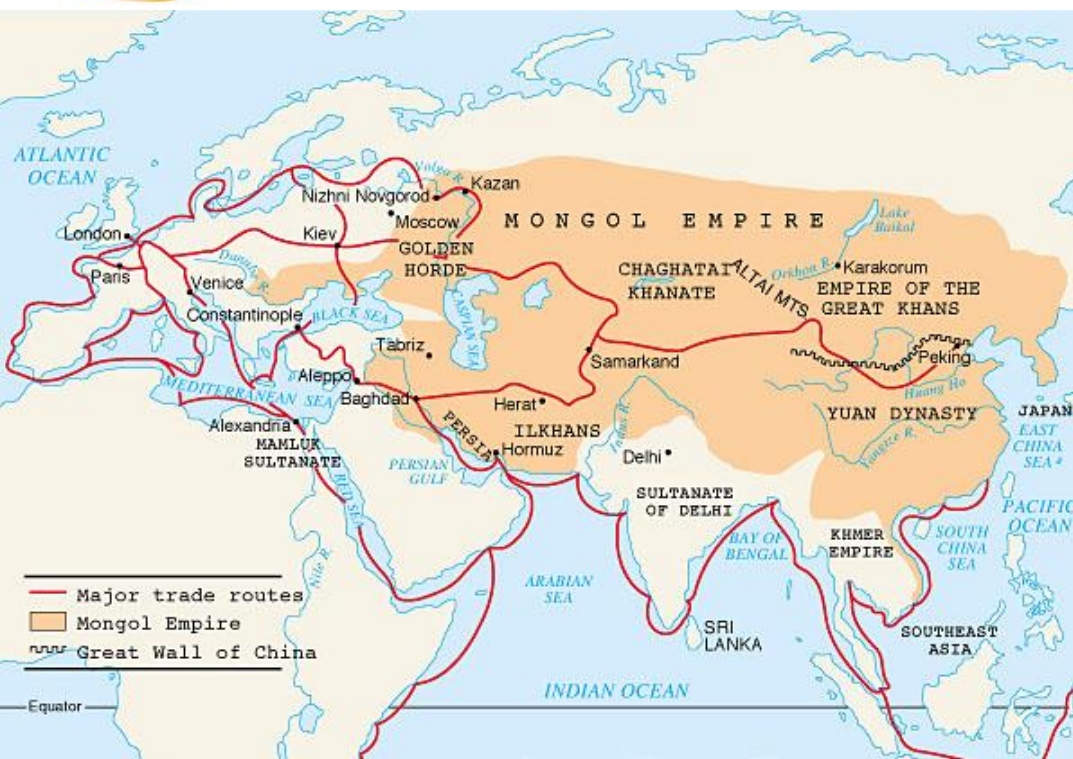
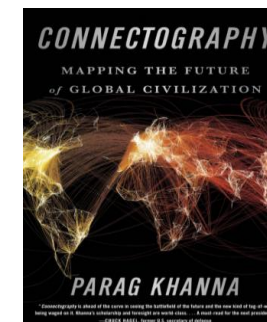


The 21st Century Maritime Silk Road: an opportunity to catch

Challenges and strategies for the growth of multimodal freight transport

Maurizio Gentile – CEO and Director General, Rete Ferroviaria Italiana

The new Chinese empire



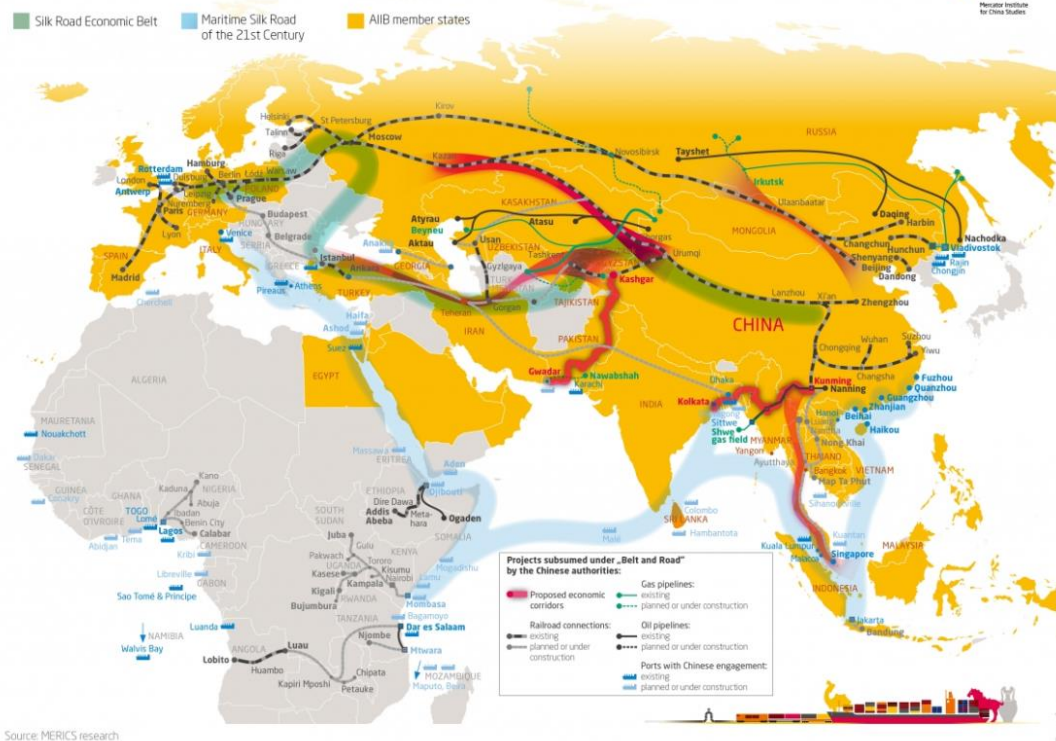
“China now has more neighbours than any other country in the world, and [...] today its strategy is to avoid conflict while maneuvering to control supply chains. The result will be a functional map that harks back seven centuries to Eurasia’s mighty Mongol Empire. [...] the de facto map is quickly coming to resemble that of the thirteenth-century Mongol emperor Kublai Khan, whose Golden Horde ruled modern-day Siberia and Korea, conquered all of China, and stretched as far as Ukraine and Iran.” (P. Khanna – Connectography)

26-28 June 2018, Genoa, Italy



The New Silk Roads and the « *maritime* » route

China aims to build a global infrastructure network
"Belt and Road" infrastructure projects, planned and completed (March 2017)



Source: MERICS research

Source: MERICS (Mercator Institute for China Studies) – 15/05/2017

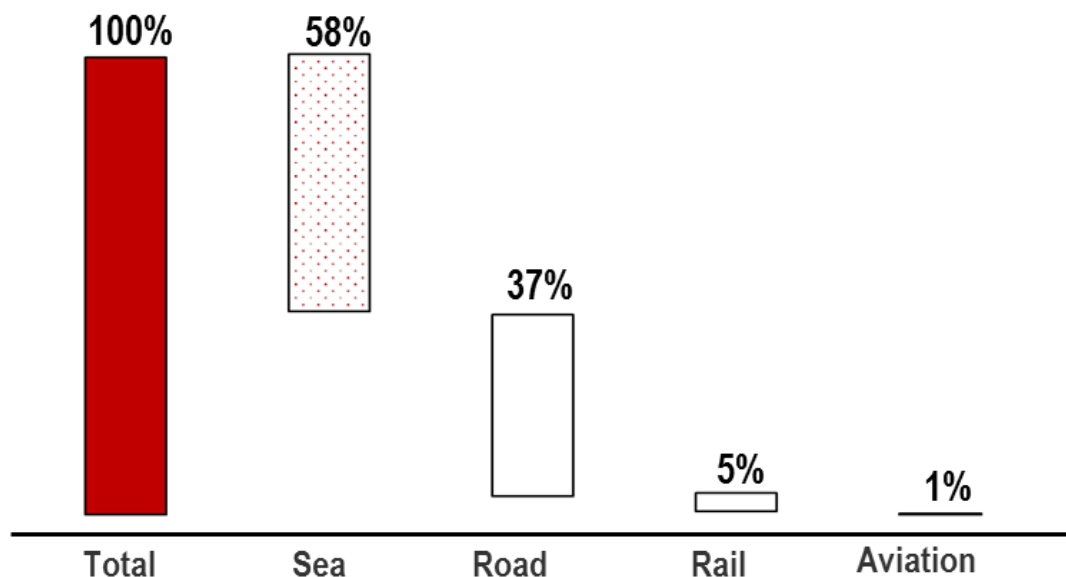
The **21st Century Maritime Silk Road (MSR)** represents a special point of interest for Italy, because of:

- ✓ The country **strategic** position in the **Mediterranean**
- ✓ The current **patterns** of **industry localisation** in China (near the East coast) and the **kind of goods exchanged** (both finished products and raw materials)
- ✓ The special role that the **sea freight** traffic plays in the Italian **modal split**
- ✓ The **perspectives** of the **global trade** which see the import/export from/to South-East Asia, Oceania and East-Africa countries to develop in the next 20 years



The Maritime Silk road: a challenge for the italian railway system

Modal split of freight traffic in Italy (2015)



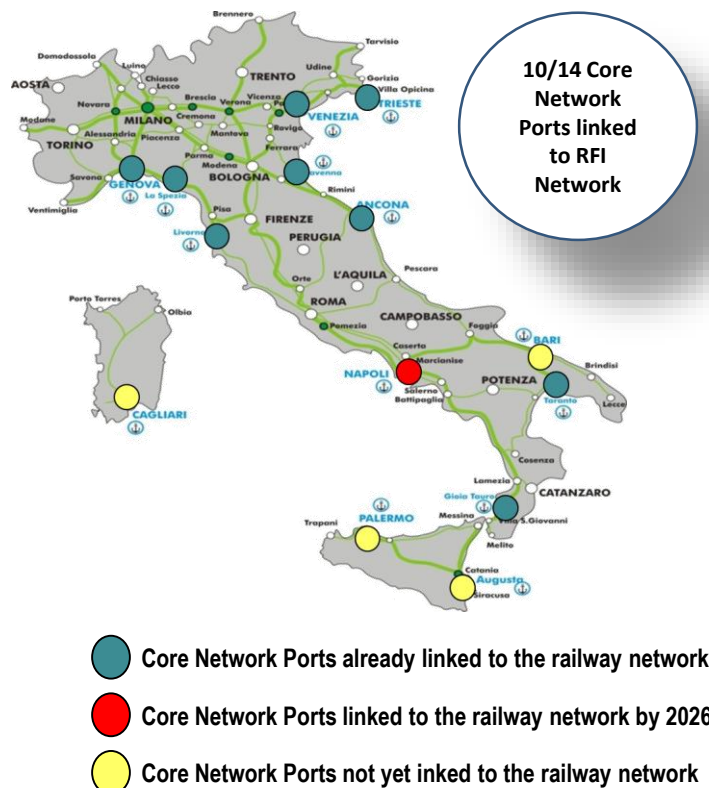
Source: Analyses and forecast of the freight transport in Italy (Confcommercio, October 2017)

- ✓ Why is the Maritime Silk Road is so **important for rail**?
 - From a strategic point of view **rail and sea shipping** are not competitive but **complementary transport modes**
 - Goods arriving in Italy from China through sea are currently **forwarded by road** mainly
 - The MRS represents a great **potential** for **shifting** traffic from **road** to **rail**
- ✓ What actions is Italy putting in place to catch this opportunity?
 - **investing in maritime ports**
 - working to make **intermodal transport** more competitive addressing the bottlenecks at hand-over point from rail to ports/terminals
 - Improving **national rail interoperability standards**
 - Strengthening the cooperation between IMs and the key stakeholders within the Rail Freight Corridors

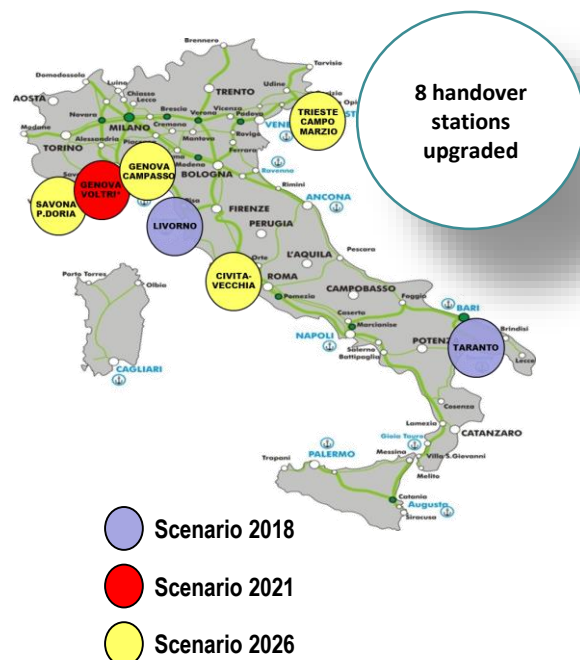


Meeting the challenge through promoting multimodality: last mile and upgrading of ports and terminals

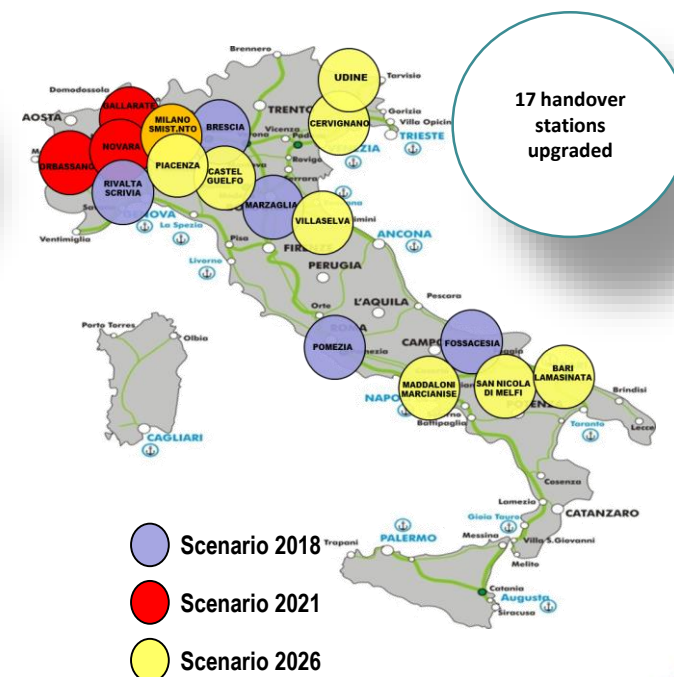
Investment plan for linking TEN-T Core Ports to the railway network



Upgrade of the handover stations linking the railway network to ports



Upgrade of the handover stations linking the railway network to the main freight terminals and shunting yards



Meeting the challenges through ensuring rail interoperability: upgrading the network (1)



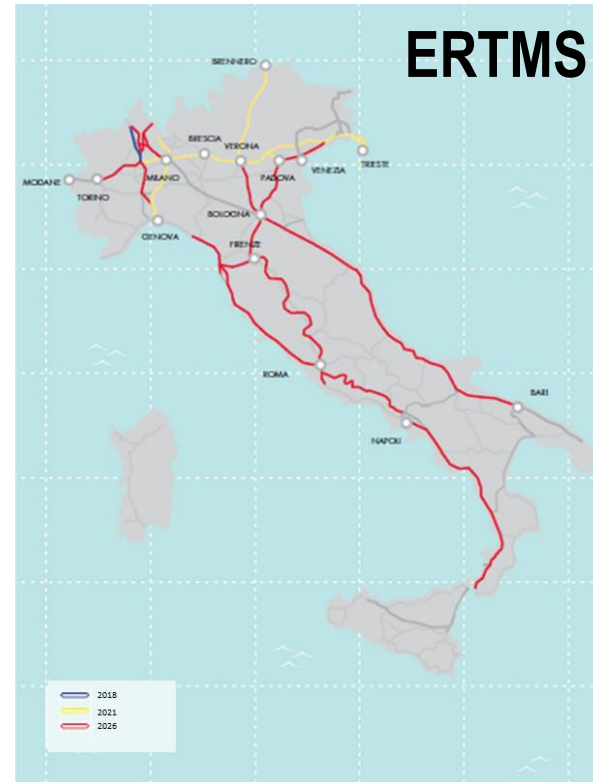
Timeline for implementation of TEN-T parameters (in % of TEN-T Core Network freight lines)

	Axle Load	Gauge
2018	83%	51%
2021	83%	76%
2026	91%	82%

Source: RFI business plan 2017-2026, February 2018



Meeting the challenges through ensuring rail interoperability: upgrading the network (2)




Timeline for implementation of TEN-T parameters (in % of TEN-T Core Network freight lines)

	T. Length	ERTMS
2018	30%	5%
2021	62%	36%
2026	83%	75%

Source: RFI business plan 2011-2026




The role of Rail Freight Corridors for maximising the use of the upgraded infrastructure




Promoting **actions** aimed at fostering **interoperability**




Key-Word:
«**Coopetition**»



Pushing the **harmonisation** of operational **processes** and **rules**



Launching a **systematic approach** in addressing **cross-border issues**



Economies of scale in developing and implementing **innovative IT tools**

