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THE EUROPEAN INTERMODAL NETWORK: SERVING COMPETITIVENESS, SUSTAINABILITY, SECURITY, AND RESILIENCE

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Agenda



1. Rail is the backbone of European competitiveness and it has a great impact on European ports and industrial strategies
2. Existing challenges affecting transalpine traffic competitiveness
3. The role of Swiss policies
4. How to get on the right tracks for transalpine traffic 2029-2033



Transalpine tunnels are like rescue donuts for European economy



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1. The recent sequence of energy and logistics crises has made Central and Western Europe economies - and Italy in particular - more vulnerable

- Reducing the transport system's dependence on **fossil fuels** alone strengthens strategies for sustainability and strategic autonomy;
- The growing propensity to export goods to non-EU countries (amounting to 48% for Italy, compared with 45% for Germany and France and 37% for Spain in 2024) represents a form of diversification that, under normal conditions, is a strength, but during periods of crisis exposes economies to **volatility arising from energy costs, tariffs, restrictions, and exchange-rate fluctuations**, with immediate effects on production

2. Europe's strategic autonomy implies reducing all technical and organizational barriers that hinder the logic of the single market.

- The **European Connecting Europe Facility** program includes four priority TEN-T corridors crossing Italy and one crossing Switzerland, with **transalpine connections** that support the **port systems** of Europe's various seas



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3. The accelerated pro-European strategy can only begin with a rapid strengthening of intermodal service networks across the Alps and towards Mediterranean ports

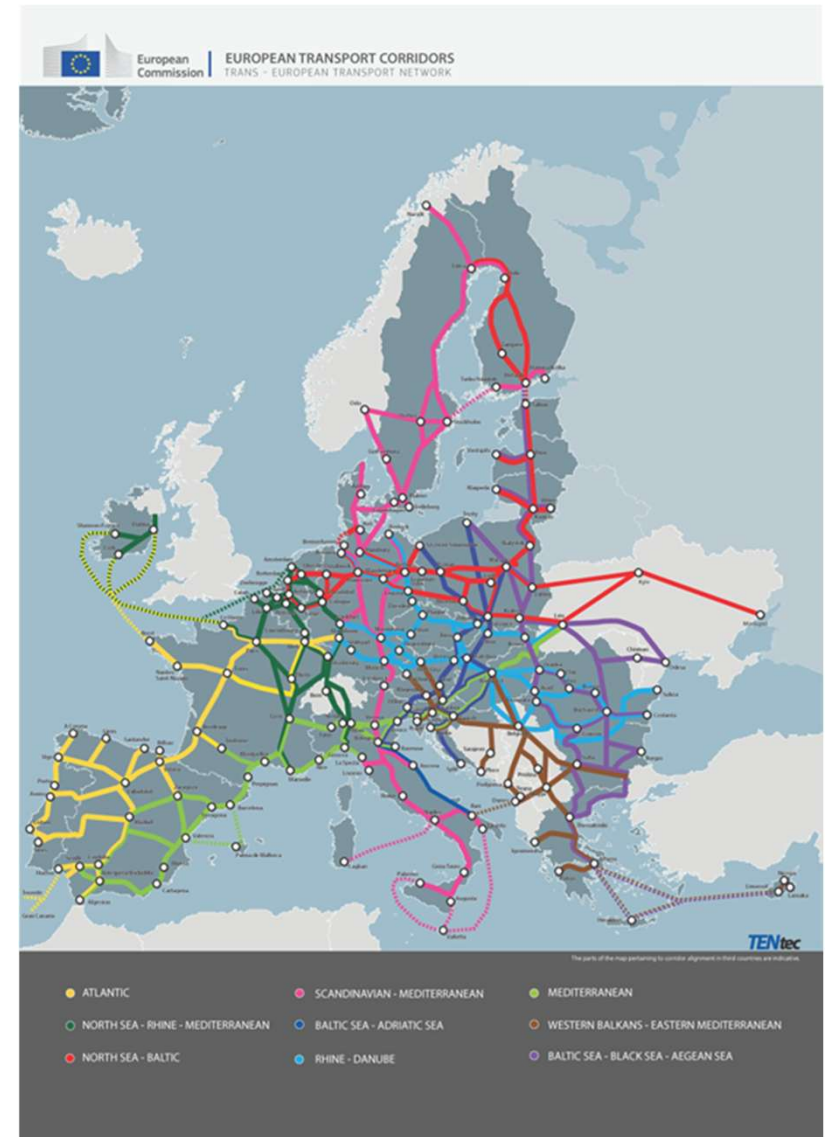
- The strengthening of the European single market, as already emphasized in the *reports by Mario Draghi and Enrico Letta*, aims to enhance **competitiveness, sustainability, and security** through measures across various sectors, also highlighted in the recent *Industrial Accelerator Act* and *EU ports and industrial maritime strategies*



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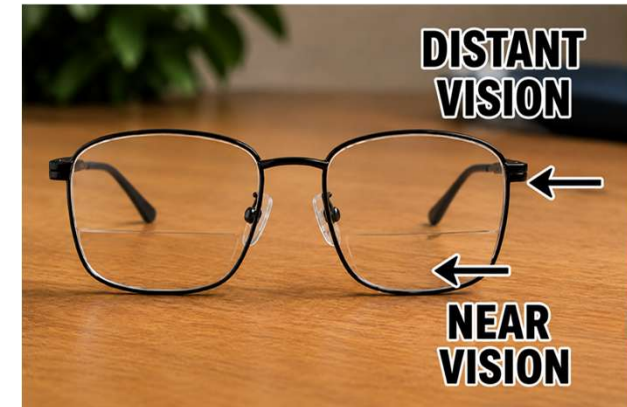
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Challenges affecting competitiveness

1) The Swiss rail market share in transalpine traffic decreased from 72,9% in 2022 to 68,6% in 2025, due to 3,6% **rise in the number of heavy vehicles**, reaching 960.000 units in 2025, alongside a **decrease in the volume of goods transported by rail**, dropping from 28,3 to 23,74 million tonnes



2) Maintenance and upgrading construction challenges

Temporary **restrictions and closures for construction site management** have caused significant limitations along the Simplon rail axis (tunnel profile upgrades to P/C80 restrictions and along the German rail network parallel to the Rhine) and along the Gothard axis (restrictions on one of the tracks due to incidents) in 2022-2028

3) Closure of the Novara-Fribourg railway highway (RoLa) in dec 2025 (80.000 trucks per year)

The completion of the Italian section of the **North Sea–Mediterranean Corridor**, which includes the Terzo Valico, has short-term horizons (2029), but requires accompanying measures and initiatives to enhance the ramp-up phase in order to achieve the **new geographical targets** (beyond the Alps) and **sectoral targets** (Ro/Ro) for intermodal services from Ligurian ports



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The rationalization of Swiss transport policies in support of rail freight transport will lead to a **reorganization of the operating model of certain traffic flows** — including a drastic reduction in rolling highways and a decrease in the coverage of single-wagonload services — also requiring a fast **modernization of intermodal nodes**

SWISS POLICIES AFFECTING RAIL SECTOR IN 2025-2035

Review of subsidies for the **rolling highway** from 2025

Increase in the cost of the performance-related **heavy vehicle fee** (LSVA) from 2029 to achieve the constitutional target of a maximum of 650,000 annual transits and to increase the market share of electric heavy goods vehicles

Review of Swiss policies in the railway sector concerning support for **single wagonload** transport for 2026-2029 period

Completion of the second bore of the **Lötschberg tunnel** and full clearance and loading gauge upgrades on the Simplon axis based on the full NRLA project from 1 January 2035



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The development relevance of rail investment depends critically on **operational activation**, rather than on capacity expansion alone.

Frequency and regularity of service deployment have emerged as the key mechanism through which infrastructure inputs are translated into positive operational disruption



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A BEACON OF LIGHT AT THE END OF THE TUNNEL
connecting Italy and Switzerland and linking Genoa and Milan
A LIGHT THAT INTEGRATES WITH THE BEACON OF GENOA

WE STILL HAVE TO **CROSS**
A PART OF THE TUNNEL

ITALY SWITZERLAND

BASE TRANSALPINE TUNNEL
ITALY – SWITZERLAND

BASE TRANSPENNINE TUNNEL
GENOA – MILAN

MILAN GENOA

WE STILL HAVE A PART OF THE JOURNEY **TO COVER**

The infographic features a central image of a train entering a tunnel. A glowing yellow line traces the path from Milan, through the Base Transalpine Tunnel (Italy-Switzerland), and through the Base Transpennine Tunnel (Genoa-Milan) to Genoa. A lighthouse on the coast of Genoa is shown as a 'beacon of light' at the end of the tunnel. A progress bar at the bottom indicates that a significant portion of the journey remains to be covered.

How to get on the right tracks for transalpine traffic 2026-2029-2033

2029 – Reliability on the main axe -The North Sea–Mediterranean Corridor is a key component of an ambitious program for the **complete redesign of transalpine and transapennine traffic**, within a longer-term strategic scenario

2033 – Building confidence in a great future of the transalpine traffic axes- The Italian sections of the *Mediterranean TEN-T corridors* (Lyon-Turin–Brescia–Verona–Vicenza–Padua) and the *Scan-Med corridor* (the Brenner axis and the loading gauge upgrade in the trans-Apennine tunnel between Prato and Bologna) **will be completed by the end of 2033**, radically transforming the competitiveness of the European railway network and the Ligurian port system, while also constituting a key element of a new industrial and environmental policy.

The main infrastructure components must be complemented by **organizational and technological innovations** (for example: reducing technical barriers through depots and maintenance areas, reducing the costs of port rail shunting, pricing schemes with incentives, intermodal network approaches, emergency plans such as the “Ranstadt Plan,” etc.)



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