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WHO WILL MAKE BUSINESS HAPPEN? SPARTANS WILL.

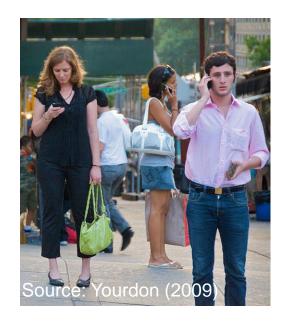
Contents

- Millennials and Impact on Transportation
- Hydrail an Enabler
- Autonomous Rail Vehicles
- Hydrail and Automation
- Discussion



Millennials (or Generation Y)

- Born early 1980s to mid 1990s (~37-20 years old)
- Largest generation in America, now larger than baby boomers
- Largest generation in U.S. labor force
- Grew up or living through difficult economic times and technological change
- Prefer urban areas, often central city, mixed-use communities with access to mix of shops
- Being connected to digital resources very important
 - Working while travelling
 - Engaging in social media
- Socially and environmentally conscious
- Willing to spend more for products of responsible companies, including environmental causes





Millennials and Transportation

- 66% of millennials have high quality transportation as one of the top three criteria to decide where to live
- They like mobility choice, with preference for public transportation on many routes, especially commuting
 - Prefer public transportation
 - Multi-modal, e.g., walking, transit, Uber
- Automotive
 - Less Americans licensed to drive now than in 1960s
 - Prefer environmentally friendly cars hybrid and electric
- Environment
 - Important consideration
 - Supporting rather than leading role for transportation choice
- Transportation preference similar in younger than millennial generation (Generation Z)





Millennials and Railways

- Higher demand for transportation by rail
 - Convenient end-to-end journey essential, e.g., walk to station/stops
 - Wi-Fi, 3/4/5G supported and stable on rail routes important
- Rail connection of suburbs important
 - Millennials buying homes for starting a family but still would like to retain urban feel and connection to city center
 - Opportunities for redevelopment of "industrial" belts of cities
- Environmental performance a marketing advantage
 - But rail needs to stay ahead
 - Electric "green" car has potential to negatively impact imagine of rail "dirty diesel trains" or "dirty electric trains" (supplied by coal power plants)

Millennials and Impact on Freight: More Online Shopping

- More purchases online
 - Short delivery times preferred
 - More frequent but smaller grocery quantity shopping (Millennial preference for fresh, local foods)
- Integration with supply chain essential
 - Opportunities for rail and transit exist, e.g., package pick up at station, grocery ordering at station or online, pick up at destination station or delivered to home
 - Pick up points on the train? Amazon patent filled
 - Stations become distribution centers?
 E.g., for package deliver, maybe by drones?
- Part of passenger train that can be easily converted to carry freight in off peak – demonstration project started





Hydrail an Enabler

- Hydrail can fit well with preference of millennials and their values
 - A public transportation option
 - No emissions at the point-of-use
 - Lower visual impact than electrification
 - Possible very low total emissions
 - Possible to use 'green' energy sources
- Hydrail can help achieve government targets
 - Contribute to better local air quality
 - Contribute to reduce greenhouse gas emissions (Paris Agreement)
 - Contribute to energy security
- Hydrail can benefit railways
 - Possibly cheaper to implement than wayside electrification
 - Easier to achieve wider rail network reach than wayside electrification as not reliant on continuous wayside infrastructure ('go anywhere train')
 - Allows use of renewable energy independent of production time
 - Potential to reduce energy cost through higher efficiency compared to diesel
 - Green' hydrogen a possible marketing advantage vs improved combustion engines, or 'brown' electricity
 - No overhead electrification at freight loading facilities easier loading/unloading of containers and swap bodies





Source: Lee (2012)



Automated Railways

- 1967 London Underground: Victoria Line automated between stations, but driver starts driving command and opens doors
- 1985 Vancouver Skytrain: Expo Line fully automated ('leaky wire' technology)
 - Now largest autonomous rail network in the world
- Current systems rely on relatively expensive wayside infrastructure for full automation
- Development of radio-controlled systems, e.g., ERMTS Level 3, advanced PTC
 - Could reduce implementation cost
 - Potential for faster installation as multiple lines could be reached via radio
- Remote radio-controlled switch locomotives



Automated Passenger Vehicles: Possibilities

- Already, safely possible in dedicated, well-defined systems with similar train characteristics
 - Currently People Movers, Metros
 - Next, most likely Very High Speed (e.g., SNCF TGV project)
 - Many control and signaling systems already intervene if driver's concentration lapses
- Lower-speed urban / regional options
 - Technology transfer from automotive, e.g., instead of line-of-sight tram/streetcar operation
 - Radio-control plus on-board sensors on dedicated right-of-way higher speeds possible compared to line-of-sight
 - Uber-type ordering of train car formation of trains at peak time
 - Flexible interiors quick, easy conversion for passenger or freight
- Automatic consist formation
 - At stops
 - In motion, individual coaches serve different destinations
 - Virtual coupling (no physical, mechanical connection)
- Mainline, mixed traffic
 - Most challenging
 - Moving block to increase capacity



Automated Rail Freight Vehicles: Possibilities

- Remote driving for less intensive service frequencies
 - Develop remote-controlled switcher technology further
 - Low-speed remote freight cars for local delivery
- Track Mobile for delivery of small consists
 - Eliminates need to equip freight cars with propulsion system
 - More flexible as does not exclusively rely on rail, e.g., sidings to turn around
- Fully automated driving
 - Track mobile or individual cars
 - Automatic train formation on route
 - Train formation while consist in motion

 Open access for shippers on local lines to reach switch yards

- Railway concentrates on long distance
- Shipper organizes and possibly operates last mile themselves



Source: Hoffrichter –

Hydrail and Automation

- No harmful emission / high voltage electrification hazard for freight railcars / trains possible
 - Direct delivery into warehouses for general merchandize and food
- Lower noise emission enabling deliveries late at night (no coasting or engine shut-off required)
- Reduced emissions at switch yards and industrial sites, which are often located close to disadvantaged neighborhoods
- Autonomous trains / vehicles possible while retaining environmental advantage on lines where electrification not feasible / affordable
- Longer range and faster refueling compared to battery options
- Urban / regional railway systems feasible through avoidance of expensive wayside power and signaling infrastructure
 - Particularly useful for lines / system with relatively low transportation capacity (e.g., people movers, very light rail, light rail)
 - 'Last mile' routes of freight cars from switch yards



Discussion

Contributions from attendees



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