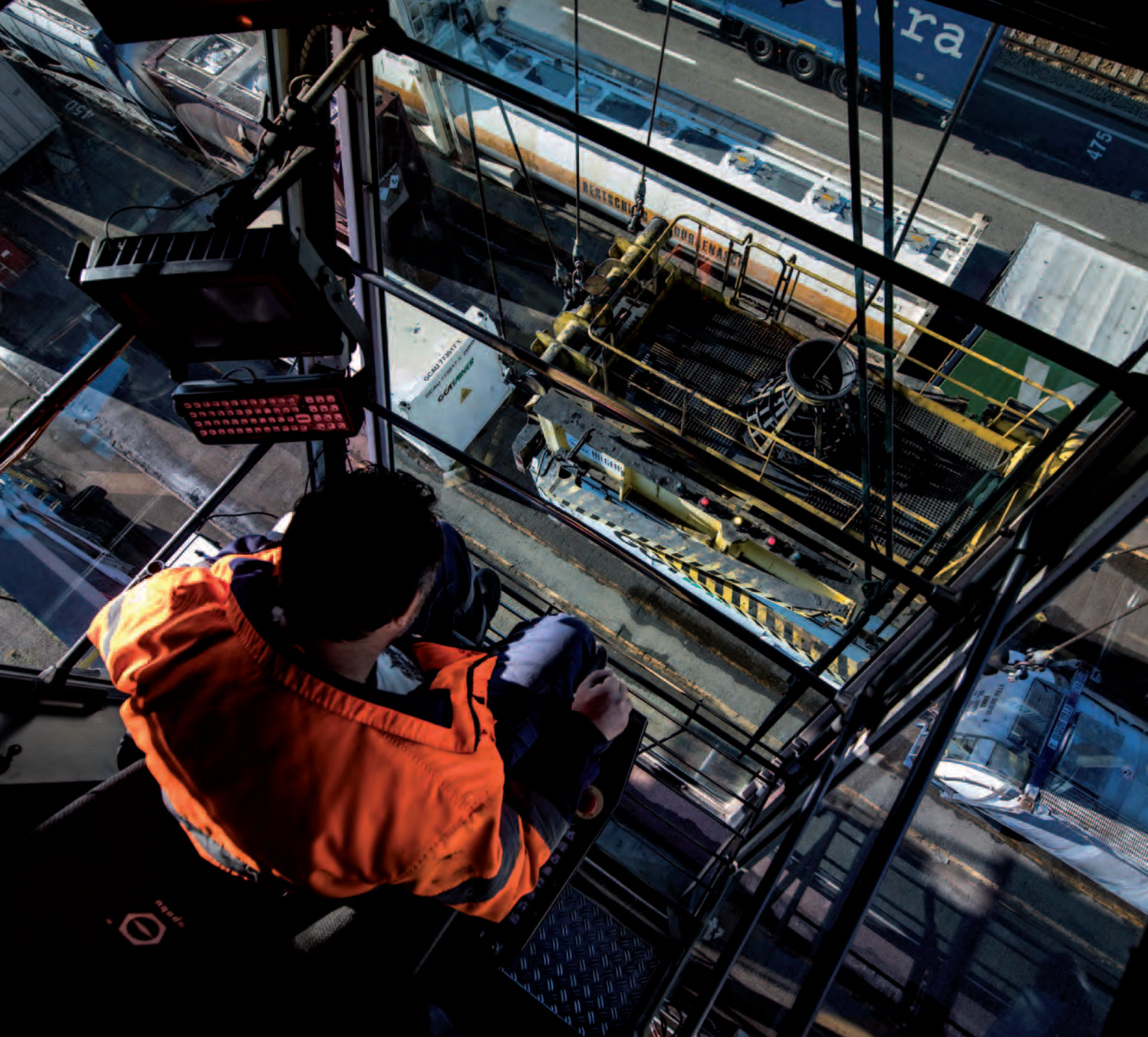




UIRR Report

EUROPEAN ROAD-RAIL COMBINED TRANSPORT

2017-18

The mission of UIRR, as an industry association, is to

grow the pie for Combined Transport through enabling fair competition based on technical merit and management excellence

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IMPRESSUM

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Key Figures of Combined Transport



3,2 million

*consignments carried by
UIRR members in 2017*

Exceeding the 2.4% GDP growth of the European Union, the performance of UIRR operator members expanded by 5.48% during 2017 and came close to 3.2 million consignments. UIRR members never transported this many units over a 12-month period before.

Thanks to extensive crisis-mitigation efforts, UIRR CT Operators could reduce their volume losses to 80,000 units along the Rhine Valley Railway that was closed because of an unplanned man-made disruption from 12 August until 2 October 2017. While the figure equals to only 2.5% of the total annual turnover, when including the financial impact of the contingency measures, the incident eliminated the profits of the affected CT Operators and other intermodal actors, like terminals, along the route.

80,000 units

*the estimated volume loss
of UIRR members attributable to
the Rastatt incident*

+38%

*growth in the volume of
rail-based CT traffic
between Europe and Asia*

The traffic volume to/from Asia handled by UIRR members grew dynamically - by 38% - in 2017.

The trains are increasingly full on the Eastbound legs as well. Moreover, it should be noted that this outstanding performance was achieved at a time when transcontinental maritime shipping rates have been substantially reduced.

2017: robust growth on the back of a strong economy

The past year was concluded with growth in terms of number of consignments forwarded by Combined Transport of +5.48% and +8.7% when counted in tonne-kilometres. This result comprises robust development across the entire cross-section of Combined Transport: domestic +9.3%, cross-border +3.8% and intercontinental +38%. The overall result - in view of the 2017 EU GDP growth estimated at 2.4% - is impressive.

The year was overshadowed by the infamous Rastatt incident, which rendered the busiest EU Rail Freight Corridor - that connects the Benelux States with Italy - unusable for 7 weeks, as well as several windstorm-related traffic disturbances, which affected predominantly Germany. These together with the poor overall punctuality performance of the railway network has meant that the profitability did not mirror the traffic growth. Substantial further efforts will be needed to improve the quality of rail freight in Europe.

The State of Affairs

FROM THE PRESIDENT

European Road-Rail Combined Transport (CT) closed a robust year as the transportation performance of UIRR Member CT Operators grew by +5.48% in terms of consignments and +8.7% when expressed in tonne-kilometres. The development of UIRR, the industry association of the sector, has been equally strong by the accession of 6 new members and 3 technology partners. Two new Memoranda of Understanding with associations engaged in the promotion of Combined Transport on a Member State level have also been concluded.

CT performance

The European Combined Transport sector and its actors, represented by UIRR, achieved outstanding growth in 2017:

- a robust advance in the total number of consignments forwarded (+5.48%) and an even more significant growth when measured in tonne-kilometres (+8.7%);
- while the average non-road distance covered by a consignment continued its previously seen increase (to 944km), shorter distance domestic and Ro-La services also performed strongly;
- the transshipment terminals under management by UIRR members also delivered a commensurately convincing performance;
- profitability, however, suffered due to the infamous Rastatt incident and the related crisis mitigation measures, as well as the continued poor punctuality performance of rail freight.

Road-Rail Combined Transport needs a more reliable rail infrastructure: resilient to extreme weather and capable of handling contingencies like the Rastatt incident. The quality of freight train paths and the punctuality of traction service providers must also dramatically improve.

Attention should be paid to the earning ability within the CT sector: financial assistance must be offered when forced to handle contingencies and asset utilization has to be boosted by more reliable railway operations.

The competitive conditions when compared with Combined Transport's closest competitor - long-distance road haulage - must be improved: road tolling and track access charging, as well as internalisation measures must converge.

Developments of the Regulatory Framework

In 2017, the European legislative agenda relevant to inter-modal transport was dominated by the Mobility Packages of the European Commission and the Implementing Regulation concerning the Access to Rail Service Facilities.

The first two Mobility Packages - unveiled in May and November - contain 11 different road legislations. If passed, among others, the legal framework of access to the road transport market and to the profession, working-, pay- and other social rules of road haulage, as well as the systems of road tolling - including internalisation - will change substantially.

In November, the Commission presented its much-awaited proposal to revise the Combined Transport Directive. UIRR has greeted the proposal and, together with its members, is working diligently to answer the numerous related questions of the European and Member State legislators.

The Implementing Regulation concerning the Access to Rail Service Facilities, which also covers freight terminals, was concluded by the end of 2017. The Implementing Regulation establishes a standardised structure for general terms and conditions - the Service Facility Statement - for all types of service facilities, as well as it prescribes a uniform application procedure to gain access. All information should be published on a single, business-friendly web portal.

The overall impact of the regulatory changes launched in 2017 on the competitiveness of intermodal freight transport could be substantial, however their full extent can only be evaluated after the passage of the proposals into law. This is only expected in 2019 the earliest.

European Road-Rail Combined Transport (CT) realised growth in 2017, last seen before the crisis of 2008-2009, with which the traffic performance of UIRR members reached a historic record.



Ralf-Charley Schultze, President

Developments of the Association

UIRR inaugurated 6 new members over the reporting period: Amber Rail, Baltic Rail, CargoBeamer, Delta 3, SRS Terminal and TC Athus Terminal, while new Memoranda of Understanding were signed with Assologistica of Italy and the European Chemical Transport Association (ECTA). Three new technology partners joined UIRR: HaCon, Tirsan and Wecon.

For the second time in its history, UIRR appeared on a stand at the logistics sector's largest gathering, Transport Logistic in Munich, while the association was also present at numerous other logistics conferences and exhibitions. Over the course of 2017, contact has been established with the Intermodal Association of North America (IANA), UIRR's sister association in the USA.

On 14 July 2017, former UIRR President Rudy Colle passed away following a prolonged battle with serious illness. Mr Colle led UIRR for 21 years between 1991-2012.

Achievements of 2017

UIRR focuses its efforts on the following three areas, in each of which substantial progress was recorded over the year:

- **Boosting the quality of rail freight:** a new high in rail infrastructure investment of €45 billion was recorded in 2017, while several Member States have decided to adopt schemes to promote rail freight. The Rastatt incident, works- and weather-related disturbances overshadowed the picture.
- **Achieving a fair, mode-neutral regulatory environment:** the OECD Transport Ministers Declaration, which admits to limited progress from a climate change perspective in the transport sector, promises new political energy for change. The transport sector has called on regulators to define an electronic EU freight document.
- **Continuously enhancing intermodal transport:** emblematic road hauliers H.Essers and Waberer's followed in the footsteps of LKW Walter to turn towards using more Combined Transport. Several Member States have announced new schemes to promote Combined Transport.

Outlook and expectations

The UIRR Combined Transport Sentiment Index stood at slightly positive throughout 2017. Continued growth is challenged amid the inconsistent quality performance of the rail sector. Profitability is endangered by regular disturbances, most recently the strikes in France.

UIRR, as the industry association of European Combined Transport, will continue to professionally contribute to the policy measures and the changes in the regulatory framework deemed necessary to deliver the modal shift objectives of the Transport White Paper, such as the Combined Transport Directive.

Many more changes will be needed to direct European long(er) distance freight transport onto a sustainable path of development. The commitment to stop climate change and to boost the competitiveness of the European economy, while making the continent a better place to live, requires more legislative and policy action.

Quality of Rail Freight



The Ministerial Declaration and the Sector Statement of 2016 • the Rastatt incident • EU-level rail freight-related activities



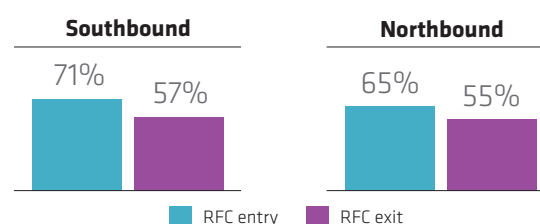
Rail freight is a strategic component of Road-Rail Combined Transport, as the one responsible for providing transport services on the longest stretch of the intermodal chain between transshipment terminals. The quality performance of rail freight is therefore paramount from the perspective of the overall success of a combined transport operation. CT is the engine of rail freight growth, therefore more attention should be paid to its needs by the railway sector.

Both UIRR's CT Operator and Terminal Manager members are highly dependent on reliable and competitive rail freight services. UIRR has been collecting quality performance statistics of rail freight service providers of Combined Transport, as well as it has been monitoring quality performance data collected and published by Eurostat, by the European Commission's Rail Market Monitoring Scheme (RMMS) and by the Rail Freight Corridors.

Being confronted with the persistent stagnation of punctuality performance of rail freight, while possessing the power to influence it through means of ownership and regulation, European Member States together with the European Commission have engaged in a series of activities intended to remedy the status quo (see table below).

The inadequate quality performance of rail freight services is part attributable to inferior train paths allocated to freight trains and a low priority given to them in daily traffic management. Only Combined Transport can remove a meaningful number of trucks from Europe's roads.

RHINE-ALPINE CORRIDOR PUNCTUALITY FIGURES FOR 2017



Source: <https://www.corridor-rhine-alpine.eu/files/flipbook/RFC-RhineAlpine-AnnualReport-2017/mobile/index.html#p=18>

The Rhine-Alpine Rail Freight Corridor contains the - probably - best performing railway lines for freight in Europe. For 2017, some CT Operators with EU-wide networks reported average freight train punctuality below 50%. The EU Rail Market Monitoring Scheme should shortly begin delivering aggregate freight punctuality figures for the entire European rail network.

Member State-level efforts	European Union-level efforts				
Sector Statement: "Boosting International Rail Freight" Ministerial Declaration to support the achievement of the Sector Statement aims	Single European Railway Area (SERA) working groups:				
	Rail Market Monitoring Scheme (RMMS)	PRIME for infrastructure managers	Rail Freight Corridors	RU Dialogue	International Railway Relations
Member State Rail Freight Master Plans - freight-specific infrastructure improvements - state aid schemes to cut track access charges and offer assistance	EU Agency for Railways		EU funding programmes		
	TSIs: Wagon, Operations, TAF	Registers: RINF, National Safety Rules	Vehicle authorisation: single vehicle passport	CEF Transport and European Fund for Strategic Investment	R&D funding i.e. Shift2Rail H2020

The Ministerial Declaration and The Sector Statement of 2016

“Boosting International Rail Freight” was the title of the statement underwritten by the European Railway Sector unveiled in June 2016. Main points addressed by the document were:

- Increasing the competitiveness of international rail freight
- Reducing the response time to planning request
- Reducing transit times and disruptions
- Improving reliability (by keeping delays to a minimum)
- Providing tracking and tracing for shippers to be able to monitor the status of their goods
- Developing a comparable set of KPIs with the involvement of stakeholders to monitor quality of service
- Working towards to common ICT architecture
- Organising an annual RFC strategy meeting at each corridor
- Strengthening the dialogue and cooperation within the advisory groups
- Holding an annual meeting of all RAGs, TAGs and interested end-customers
- Compiling and annually updating a single list of important operational issues
- Coordinating maintenance and construction works 24 months before timetable change
- Identifying, regularly updating and publishing a list of main infrastructure bottlenecks on each corridor
- Harmonisation of operational procedures of RFCs

The Dutch Presidency of the European Council organised a Ministerial Declaration to express the Member States' support to the realisation of the Sector Statement aims, which saw the need for:

- Increased market orientation
- Removal of infrastructure and operational bottlenecks
- Offering coordinated infrastructure capacity
- Boosting of the principles of transparency and non-discrimination
- Harmonised Information and Communication Technology Infrastructure
- Annual conference of RFC Executive Boards to discuss strategic issues
- Annual rail freight conference focused on service performance and needs of end customers
- Opening of the Advisory Group structure to interested railway customers
- Development of a set of harmonised RFC Key Performance Indicators
- Adapting financing schemes at EU level to resolve low cost infrastructure bottlenecks
- Taking measures to improve the coordination of works
- Supporting the redesign of the timetabling and capacity allocation process
- Appropriate and fair allocation of (infrastructure) capacity between passenger and freight transport

These two documents brought the European railway sector into motion. The European Commission acts as a coordinator/facilitator of the related activities. Ten priorities have been defined and UIRR is an active partner to the efforts undertaken to deliver on the pledges.

In 2016 the Dutch EU Presidency initiated the Declaration that commits all EU Member States to improve the competitiveness of European rail freight transport. The strength of the approach was that in parallel European sector associations adopted its statement "Boosting international freight" with commitments to improve the conditions for international freight. Since then Member States are working together in a network of executive boards of the rail freight corridors and address the issues of Rotterdam that are of common interest: exchange of data on Estimated Time of Arrival, defining Key Performance Indicators for the corridors, working together on implementing 740m train length, defining the common framework for capacity allocation on the corridors to mention a few. Member States can only address these issues if close cooperation with the sector initiatives is guaranteed. Therefore I very much welcomed the establishment in 2017 of the sector statement group where parties have worked together on the implementation of the Rotterdam declaration.

The political commitments have been made in the context of the role that international rail freight can play on future transport policy including its contributions to reducing impact of transport on climate change, reducing road congestion and improving transport safety. In this regard I took note of the good progress at European level which contributes to the objectives of the Rotterdam declaration, such as decisions on the ERTMS European Deployment Plan and support to sector driving initiatives like the rail freight corridors, ELETA, TTR and financing for retrofitting of freight wagons for noise.

STIENTJE VAN VELDHoven

State Secretary
Infrastructure and Water Management,
The Netherlands



Commitments have been confirmed to accelerate infrastructure improvements that directly address concerns of freight operators, while the streamlining of cross-border operational practices is advanced through the Rail Freight Corridor structures. The Rastatt incident of last year made very clear the cross-border effects on the issues of infrastructure and traffic management practices at time of disturbances. And shows the need for more integrated international coordination to be prepared to respond to such incidents in a more adequate and effective manner.

This year will be an important year. A year of taking stock of our progress and setting the agenda for the future. We will only be able to move forward, with the continuing cooperation and support of both my fellow European Ministers and the commitment of the sector. I look forward to working with you on this agenda in the upcoming year.

The Rastatt incident

A study commissioned by ERFA, NEE and UIRR, which was delivered in April 2018 by consultants HTC, has found that total losses related to the Rastatt incident exceeded €2 billion. The rectification of these claims will likely take quite some time, as first, liability will have to be established. Unfortunately, the Single European Railway Area Directive does not prescribe the coverage of such incidents by the liability insurance policies of infrastructure managers, hence the affected Member State will have to step in to indemnify the claimants.

On 12 August 2017 the tunnelling works under the Rhine Valley railway line near Rastatt in Germany have collapsed, rendering the strategic line unusable for 7 weeks. On short notice, a diversion had to be devised for up to 200 international freight trains, which use the section on an average working day. The ineffectiveness of cross-border contingency management has shaken the confidence of shippers, while it resulted in losses of business and excessive costs for the entire rail freight sector - including Combined Transport Operators and Terminal Managers.

The railway sector, and DB Netze as the infrastructure manager in charge of the works, was rapid to assume responsibility. The development of a Contingency Management Handbook for incidents with international repercussions was started without delay. The Handbook is foreseen to describe how rail infrastructure managers should act in case of a major unforeseen disturbance, such as the Rastatt incident. Everything from crisis communication to the establishment of diversionary routes, the allocation of freight train paths and special rules for unobstructed operations should be addressed and is planned for sector endorsement before the end of 2018.

UIRR has been an active participant in the crisis communication efforts, as well as the post-crisis rectification activities on behalf of the deeply concerned Combined Transport sector.



EU level rail freight-related activities

UIRR participates in the European Commission's SERA working groups, as well as in the activities of the European Union Agency for Railways (see graphic on pg. 7) to represent the views of rail freight clients primarily from the perspective of Combined Transport. On a more operational level, UIRR acts as the coordinator of Terminal Advisory Group (TAG) Speakers of Rail Freight Corridors (RFCs), as well as it regularly attends advisory group meetings.

Most prominently, UIRR follows closely the implementation of European Union legislation affecting rail freight including the developments in track access charging, Rail Freight Corridor developments and the implementation of the Technical Pillar of the Fourth Railway Package.

UIRR pays attention to the different funding programmes of the European Union and Member States for the development of the rail infrastructure, rail freight-related research and development and other types of assistance. UIRR directly participates in several EU funded R&D projects with an aim to further enhance the quality performance of rail freight (see below).



The freight network will need to offer enhanced connectivity between the various EU rail freight corridors and hence there will be the need to manage increasing numbers of train movements and shunting operations through freight marshalling yards at strategic locations in the coming years.

With the OptiYard project, the 13 Consortium partners under the coordination of UIC will provide tools to enhance decision support that can be directly applied to achieving enhanced yard capacity and efficiency. The OptiYard (Optimised real-time yard and network management) Project is a Shift2Rail initiative.



The objective of the CEF Transport project, ELETA, is to enable and demonstrate the generation and electronic exchange of information on the Estimated Time of Arrival (ETA) of intermodal freight trains between all stakeholders of the intermodal transport chain.

The consistent availability of reliable information on the ETA of intermodal freight trains is important in particular because it allows more accurate resource planning by the transshipment terminals and the road hauliers who complete the combined transport chain. The result should be cost savings and simultaneously an improved quality of service, which collectively should enhance the attractiveness and competitiveness of rail freight.

EUROPEAN RAIL LOCATIONS PORTAL

The project objective is to develop an efficient, user-friendly, single online source for information about rail service facilities that are covered by the Implementing Regulation on Access to Rail Service Facilities.

The aim is to satisfy the data disclosure requirements defined in the Implementing Regulation and in the Rail Freight Corridor Regulation (for terminals).

The consortium, which includes UIRR, will develop a web portal that will enable efficient compliance for service facility managers, while offering the information in a searchable digital format suited to the requirements of the 21st century.

Fair, Mode-Neutral Regulatory Environment



The Principles of European Transport Policy-Making • The European Mobility Packages • Issues that Remain to be Addressed



Intermodal transport, which is a transport solution that combines different transport modes to perform a single goods transport operation, is the alternative to unimodal transport connection, which is performed by a single transport mode. Intermodality can only be competitive if the costs of all modes of transport are allowed to reflect the totality of resources used when creating them - including the charging for the use of state-owned transport infrastructure and external costs related to their functioning.

Modal transport operators are primarily focused on the neutrality of the regulatory framework within their specific modes: (i) track access charging to affect incumbent and newcomer railways in the same manner, or (ii) domestic truckers are not afforded a road toll discount versus their foreign competitors.

Intermodal transport operators are equally sensitive to the technology- and mode-neutrality of the regulatory framework of freight transport. Road-Rail Combined Transport is, for instance, a direct alternative to unimodal (end-to-end) long-distance road haulage.

Considering the extent to which governments are involved in influencing the costs of the various modes of transport in Europe, close attention must be paid to the regulations that describe it (see table below).

Transport laws are typically mode-specific, there are rarely examples for legislation alongside horizontal topics. Regulatory revisions are seldom harmonised in time, scope or content, and they are often handled by different units within Ministries of Transport. Subsequently, achieving a comparable and mode-neutral regulatory framework even between only two modes of transport - such as road and rail - remains an outstanding challenge.

Road haulage	Topic	Rail transport
access to the market (permits)	Doing business	- licensing (permits) - conditions of doing business
physical parameters of roads	Infrastructure	physical parameters of railway lines
tolling and toll-collection		track access charging
		electricity system
length and weight	Vehicles	active safety system (signalling)
passive and active safety systems		traffic management (priority rules)
level of harmful emissions (EURO)		length and weight
energy efficiency (CO₂ – NEW)		maintenance requirements
testing and authorization		active and passive safety systems
composition of fuels	Fuel	level of harmful emissions (incl. noise)
energy taxation (excise duties)		testing and authorization
posting of transport workers	Drivers	composition of fossil fuels
social rights protection		energy taxation (inclusion in ETS)
working time		training and certification (including language skills)
training and certification		

The principles of European transport policy-making

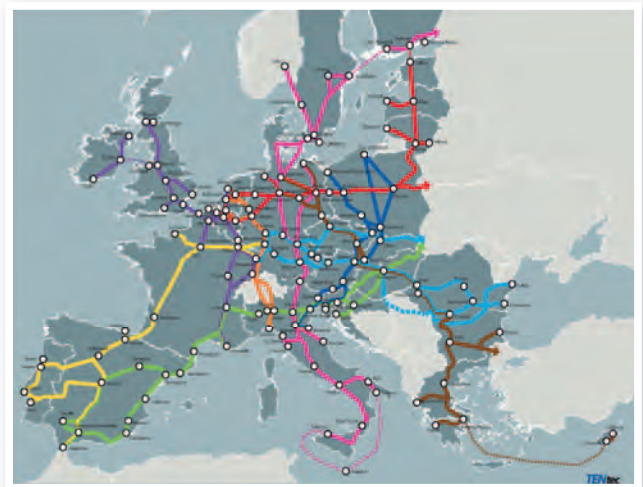
The two declared driving principles of the last decades of European transport policy-making have been *user-pays* and *polluter-pays*. The first should impact the charging for the use of state-owned transport infrastructure, while the latter should apply when internalising external costs. Environmental considerations – embodied in the fight against air and noise pollution, as well as climate change/greenhouse gas emissions – have recently come to complement these two basic principles.

Declared goals for transport safety have been much tailored to the respective modes: on road it is a modest commitment to reduce the total number of fatalities, while for other modes it is more meticulously expressed in accident prevention aims, like the European Union Agency for Railways's Common Safety Targets.

UIRR focuses its work on rail, road and intermodal regulation with a special attention to ensuring interoperability. Transport law-making in case of rail has focused on harmonisation and simplification of legislation – since the energy efficiency, the safety and the externality performance of rail was viewed as being largely satisfactory – with the exceptions being the noise-externality, the internalisation of electricity generation's CO₂ externality, and the issue of infrastructure access charging.

Stemming from the state ownership and the monopoly standing of rail infrastructure management, which – through close controlling of trains – heavily impacts the quality performance of the overall railway sector, rules were also created to increase transparency, accountability and to streamline unjustified national differences for the sake of efficiency. The recast of the First Railway Package (2012), the Rail Freight Corridor Regulation (2013), and the Fourth Railway Package (2016), together with the related delegated acts are viewed to have done the job.

The Regulation on the Trans-European Network for Transport (TEN-T), as the sole multimodal piece of European transport legislation, sets the framework for the development of transport infrastructure in 2013. What remained for 2017-18 is the legislative framework of road transport.



The First Mobility Package constitutes the next step to increase equality across all the European modalities. Through the revision of the Eurovignette Directive and the EETS proper application of the user- and polluter-pays principles while also tackling unfair competition in the road sector through market and social proposals.

The road charging aspects of the Package are not meant to punish the road sector but to push it to innovate further. Sometimes the sector views this as a threat but this is a reductive perspective. As demands for decarbonisation increase and more and more cities implement UVARs (Urban Vehicle Access Restrictions) it needs to be seen as a challenge to overcome. Users that do not want to innovate should not be protected but those users that reduce emissions and make innovative strides should be rewarded. Additionally, this should also increase the attractiveness of multimodal transportation options.

The second part of the Mobility Package tackles the various concerns of unfair competition within the road sector. One of the primary issues I want to tackle is the unsocial living conditions of drivers on the road. That is why I want to maintain and

WIM VAN DE CAMP

MEP, TRAN Coordinator
for the EPP Group
European Parliament



expand the ban on the rest in the cabin. But we have to realise that resting in the cabin is sometimes necessary. Therefore, I propose that only in socially acceptable conditions on dedicated guarded parking places, rest in the cabin will be allowed. This will be coupled to a measured application of the Posting of Workers Directive and simplification of the cabotage rules.

Through all of these measures I believe that the EU will be able to take the necessary steps in making our road transport sector emit less, be more competitive, have better social conditions for our drivers, while also increasing road safety.

The European Mobility Packages

The European Commission unveiled its proposals to rewrite the regulatory framework of road transport in three packages - highlighting only those initiatives that impact freight transport:

- **Mobility Package I.** - tabled in May 2017: road tolling including internalisation rules, European Electronic Toll Service (EETS), Access to the EU road haulage market and use of hired goods vehicles, Enhancement of social legislation in road transport, including the posting of transport workers, Working time rules and Quality of petrol and diesel fuels.
- **Mobility Package II.** - published in November 2017: Alternative fuel infrastructure, Clean and efficient road vehicles, Post-2020 CO₂ standards for cars and vans, Tyre labelling, Combined Transport.
- **Mobility Package III.** - expected in May 2018 with the following contents: Electronic transport documents for freight transport, EU road safety policy framework, Cooperative, connected and automated mobility, CO₂ emissions and energy efficiency of heavy duty vehicles.

The three Mobility Packages of 2017-18 represent the most comprehensive transport-legislative initiative ever tabled by the European Commission. These were preceded by the amendment of the Directive on Weights and Dimensions of Commercial Road Vehicles in 2015.

From an intermodal perspective, the ambitions of UIRR are to ensure that the underlying principles of law-making are soundly and even-handedly applied within the various modal legislations.

Issues that remain to be addressed

While it may seem that every aspect of road transport has been covered in the Mobility Packages, three topics remain outstanding

- energy taxation (reform of fossil fuel taxation),
- aspects of EU-level enforcement - including the creation of a single European Agency for Land Transport (similar to the National Transport Safety Board, or NTSB, of the USA),
- a European solution to internalise the accident externality.



Funding of transport infrastructure

The infrastructure used by transport service providers throughout Europe is dominantly in public ownership. The development of the infrastructure is consequently financed from public budgets. This places constraints on both the scope and the objectives of works: freight focused investment is crowded out by passenger minded projects, while there seems to be a reduced sensitivity towards return-on-investment when deciding where to allocate the scarce public resources.

UIRR has long advocated that infrastructure investments must reflect real market needs and should offer a credible return from the quantity of traffic foreseen. Accordingly, enabling the circulation of 750-meter-long freight trains and creating the P400 profile gauge on all lines used by freight should be sensible priorities. Bottlenecks on border-crossings should also be eliminated. A regulatory solution also needs to be found to channel private capital, and the requirements of private investors that come with it, towards founding transport infrastructure projects.



The overall objective of the H2020 project AEROFLEX is to develop and demonstrate new technologies, concepts and architectures for

- complete vehicles with optimised aerodynamics, powertrains and safety systems, and
- flexible and adaptable loading units with advanced interconnectedness contributing to the vision of a "physical internet".

UIRR's role in the project consortium is to ensure the intermodal transport compatibility of the technical solutions devised by the AEROFLEX partners.

Enhancement of Intermodal Transport



2017: A Historic Year for Combined Transport

- Standardisation to Boost Intermodality •
- Services to Support Daily Operations



Intermodal transport is a by-product of World War II and the container was introduced during war by the US military. Containers and other intermodal loading units enable the quick and efficient transshipment of both bulk and non-bulk cargo between the different modes of surface transport in quantities from half-a-truckload to a full truckload, which corresponds to the quantity of preference of the modern economy. Subsequently, intermodal transport competitively enables the participation of non-road modes in carrying all kinds of cargo over longer distances.

Multimodal transport

Goods transportation that employs more than one mode of transport.

Intermodal transport

Multimodal goods transportation where the cargo is carried in an intermodal loading unit throughout the entire journey.

Combined transport

Intermodal goods transportation where the road legs of the journey are kept to a minimum, while the longest possible section of the distance is covered by non-road modes of surface transport.

Combined Transport is the most beneficial transportation system from a societal perspective, being the most energy efficient, safest, and least polluting solution of goods transport. Railways, inland waterways and seafaring vessels carry the cargo over the longest segment, thereby using the least of energy resources, while minimising the disturbance caused to society and to the environment.

With urbanization comes increasing population density that – for the lack of space – cannot be matched by endlessly extending the density of transport infrastructure. To maintain mobility of both goods and people, shippers and passengers must turn to modes of transport that require less space, while having the same or higher throughput, such as railways.

The increase of congestion naturally results in a loss of valuable time spent in traffic jams. In the European Union the annual losses attributable to road congestion are estimated at about 1% of GDP – the equivalent of the European Union's yearly budget. The economic result of transport accidents, most of which occur on roads, reaches the same magnitude.

Combined Transport is the sub-category of intermodal, where the road legs of the transport chain are kept to a minimum, while aiming to maximise the distance performed by non-road mode(s) of transportation.

Multimodal transport is often used to carry large quantities of bulk materials, which are optimally suited to a range of transshipment methods from pipes for liquids to conveyor belts for solids. Intermodal transport's mission is the efficient carriage of smaller quantities both for bulk cargo or palletized dry goods (manufactured goods) using intermodal loading units from half-a-truckload – 6 metres in length – onwards.

The rapid ageing of truck drivers, who work on long-haul assignments, is proof of the difficulty to attract young people to the arduous lifestyle that requires several weeks at a time spent in the back of a truck's cabin. Combined Transport uses *day trucking*, where the driver can return home every day. Hence finding drivers for intermodal motor carriage is much easier.

2017: a historic year for Combined Transport

In November 2017 the European Commission unveiled its proposed amendments to the 25-year-old, and thus largely outdated Combined Transport Directive of the European Union.

The proposal will:

- **Extend the scope** of the Directive to include domestic combined transport operations, which together with some additional definition changes will mean that over 70% of intermodal transport in the European Union will qualify as Combined Transport.
- **Improve the efficiency of enforcement** of compliance, while reducing the disturbances caused under the present practice to actual transport chains.
- **Refine the range of state aid measures** (i) by mandating Member States to provide assistance to the construction and upgrading of transshipment terminals, the gateways for freight travelling on road towards the non-road modes, and (ii) by boosting the confidence of Member States to offer additional measures that would reinforce the competitiveness of Combined Transport (until the regulatory discrepancies that undermine competitiveness are corrected).
- **Enhance transparency and implementation** by proposing a national data collection and reporting regime to support the existing Commission reporting, while also mandating the appointment of competent authorities responsible for Combined Transport in each Member State. The Commission should also create a database of all Combined Transport-related Member State rules and support measures.

UIRR participated throughout the process that accompanied the drafting of the proposal and is presently assisting European and Member State legislators to further refine the amendment. The ultimate aim is to enable the new Combined Transport Directive to most efficiently deliver its mission to simultaneously enhance the competitiveness of the European economy and the quality of life of European citizens.



The Intermodal Exhibition in the European Parliament building

Not long ago I had the pleasure to open the Intermodal Exhibition organised by UIRR and its American counterpart, IANA, in the European Parliament building in Brussels. It was one of the first events of the Commission's "Year of Multimodality".

In this context, the revision of the Combined Transport Directive, for which the Commission proposal was unveiled in November 2017, is probably the prominent legislative initiative, but it is not the only one. In May, the Commission is presenting two other essential initiatives aimed at establishing a fully digital environment for information exchanges between freight transport operators and authorities. Our ambition is clear: we want to move towards zero paper in freight logistics.

Thanks to our initiatives, multimodal freight transport should become less complex, more competitive and easier to use. This in turn should result in an acceleration of modal shift: shippers will find it economically sensible to reorganise their long-distance operations so that the alternatives to road transport are used whenever available.

VIOLETA BULC

EU Transport Commissioner



I am strongly convinced that, by encouraging multimodal transport, we can contribute to the decarbonisation of the transport sector, while also reducing the emission of pollutants, noise, accidents, fatalities and congestion in general. I call on every actor of multimodal freight to become the partner of the European Commission in achieving our joint aim of a more sustainable freight transport in the Union.

Standardisation to Boost Intermodality

Standardisation is essential to ensure the competitiveness of intermodal transport, which depends on the collaboration of several transport modes and a wide range of actors. Today, a number of entities are engaged in the standardisation work for intermodal:

CEN/CENELEC: the European counterpart of the International Standardization Organisation (ISO) runs the Technical Committee TC119 "Intermodal Loading Units and Cargo Securing (ILUCS)" where UIRR leads the Working Group WG6 "Intermodal Loading Unit".

European Union Agency for Railways (EUAR): the recently launched "Task Force on the Facilitation of Combined Transport", which functions with UIRR's active participation, has been tasked to review the freight-related TSIs (Technical Standards for Interoperability) as well as the registers under its purview from the perspective of the needs of intermodal transport.

UIC: is engaged for a prolonged time now to update the intermodal transport-related UIC leaflets - non-mandatory industry standards, which are nevertheless followed broadly by the rail infrastructure managers and state-owned railway undertakings. UIRR is enthusiastically encouraging the completion of this work.

UIRR: develops best practice guidelines in its own interest groups such as the General Terms and Conditions for Combined Transport operations, digital data-communication format (EDIGES), as well as covers other aspects of intermodal transport.



identification of Intermodal Loading Units in Europe



Services to Support Daily Operations

Digital services: UIRR is contributing to the development and daily management of the CESAR tracking and tracing system, while issuing terminal and customer codes to enable the running of EDI systems. UIRR also facilitates the development of a digitalization strategy for the intermodal sector.

The ILU-Code owner identification marker: UIRR is not only the Administrator of the ILU-Code, responsible for issuing ILU-Code owner-keys and maintaining the Register of ILU-Code owner-key registrants, but is also engaged in developing a Register of Intermodal Loading Units based on the individual ILU-Codes, as well as other services that will deliver value to the intermodal operators and terminal managers.

Projects for intermodal actors: besides developing solutions using own resources, UIRR is also involved in R&D projects that receive external funding to develop systems and solutions that will ultimately help the organisation of intermodal transport and the management of terminals.



The HubHarmony Project, co-funded by H2020, is developing a benchmarking solution - a scoring system, which enables an evaluation of the harmonization level of operational procedures and the service offer at inland multimodal hubs. Operational procedures include hub technologies, business processes as well as administrative aspects and services include both current services and potential future services.

The harmonization benchmark will enable logistics operators to plan the development of hubs. Moreover, it will enable to monitor the progress of harmonization and to collect valuable data for future policy actions. HubHarmony will give insights into future dynamics and will indicate upcoming needs of transport systems with a focus on interoperability and harmonization of inland multimodal hubs.

www.hubharmony.eu



The project consortium proposes to research three aspects of the Physical Internet: (i) Synchromodality as a service, (ii) Warehousing as a service and (iii) e-commerce fulfilment as a service.

UIRR's interest is to demonstrate the role and potential of Combined Transport and the use of Intermodal Loading Units in achieving the reduction of the carbon footprint of the relevant transport-chains.

The collective aims are to reduce the carbon footprint, achieve superior customer satisfaction, reduce transit time, improve logistics asset utilization, offer better labour productivity and enhanced interoperability.

ICONET is co-funded by the EU's H2020 program.

The Year in Brief

Activities of the Association



Fulfilment of the mission • Highlights of the year • The European intermodal dialogue • Strengthening the Association



UIRR is the European industry association of Combined Transport. The association binds together Combined Transport Operators, Transshipment Terminal Managers, technology suppliers and various associations committed to promoting intermodal freight transport in Europe. UIRR also builds numerous bridges towards shippers, stakeholders of related transport modes and operators of different types of transport infrastructure.

Fulfilment of the mission

UIRR, pursues a strategy to achieve its mission objective – just like a company in the marketplace. The association's activities are organized around the following three fundamental topics of concern:

- Quality of rail freight
- Fair, mode-neutral regulatory framework
- Enhancement of intermodal transport

The publications and oral interventions, event and working group participations, the projects and studies undertaken, or other actions performed by the association are all driven by one or more of the above strategic concerns.

Highlights of the year

UIRR appeared on a stand shared with MoU Peer IBS for the second time at the Transport Logistic in Munich. This biennial event is the largest assembly of logistics actors in Europe, which offers an efficient opportunity to meet and discuss the issues face-to-face.

The Intermodal Exhibition, organised with the contribution of the Intermodal Association of North America (IANA), in the European Parliament building on 31 January 2018, lined up Members of Parliament, Transport Commissioner Violeta Bulc and representatives of the Belgian Transport Minister. “Intermodal Transport in Europe and North America: What can we learn from each other?” coincided with the launch of discussions at the European Parliament Transport Committee on the Combined Transport Directive’s amendment and was the kick-off to the European Commission’s Multimodal Year initiative.



The UIRR team - from left to right: Ákos Érsek, Chief Policy Advisor, Barbara Bento, Project Officer, Ralf-Charley Schultze, President, Pekiyi Biçici, Assistant to the Management, Eric Feyen, Technical Director.



Daily activities

UIRR's work materializes in

- **Written communication:** publications, press releases, position papers, studies, newspaper articles and official correspondence - of which on average 5-6 are produced monthly;
- **Events:** organization and/or participation in events, conferences and working group sessions - on average 10 instances a month;
- **One-on-one meetings:** besides the numerous personal exchanges conducted at events, UIRR staff organizes and attends more than 20 one-on-one meetings in a month.

Considerable resources are devoted also to statistics collection and reporting, standardization and participation in EU funded R&D projects, as well as to supporting the daily operation of Combined Transport through IT services, the administration of the ILU-Code and the production of various support publications such as the Dangerous Goods and Load Securing leaflets, or the General Terms and Conditions for Combined Transport Operations.

The European intermodal dialogue

Participation: whereas UIRR staff is an intense partner to the ongoing European Union level dialogue concerning the various issues of intermodality, rail freight and freight transport regulation, the association regularly invites its members to join these discussions, speak at conferences and participate in meetings with decision-makers.

Networking: the internal working groups - known as Interest Groups - as well as Technical and Regional Platforms and the association's official gatherings offer the opportunity to members to network and to exchange thoughts between themselves.

Contribution: UIRR members often participate in the R&D projects undertaken by the association to reinforce the market focus of these projects - indispensable to a practical and valuable outcome.

Farewell Rudy Colle (1940-2017)

Former Director General and Executive Chairman of UIRR, has passed away after a prolonged battle with illness. Mr Colle worked at UIRR over a period of 21 years beginning in 1991. This mission followed a 25-year career in aviation with the Belgian flag-carrier, Sabena. Rudy Colle remained active even after retiring from full time work in 2012, and became the Brussels Representative of the Bureau International de Containers (BIC).

The dedication of Mr Colle to Combined Transport has been appreciated throughout the institutions of the European Union, by international governmental organisations and among association peers in Brussels. He was especially passionate about promoting a fair regulatory framework for all modes of land transport that would yield the much-desired modal shift from road to less polluting, more energy efficient modes of transport, which operate with fewer externalities, such as railways. Rudy Colle will forever be remembered as a gentleman for his professionalism, his enthusiasm and his humour.



UIRR's mission: Grow the pie for Combined Transport through enabling fair competition based on technical merit and management excellence

UIRR today

During the reporting period 2017-18 UIRR inaugurated 6 new members:

- Amber Rail
- Baltic Rail
- CargoBeamer
- Delta 3
- SRS Terminal
- TC Athus

As of January 2018, UIRR has 37 members from 17 Member States of the European Union. Memoranda of Understanding have been concluded with 12 peer associations, while formalized relations were put in place with 12 technology partners.

The traffic handled by UIRR members represents about half of the European Combined Transport market.

Strengthening the Association

Inviting European Combined Transport Operators and Terminal Managers is actively pursued to further enhance UIRR's representativity. Members and experts from every CT business model and technique, the different geographic regions of Europe, and all business sizes are welcome to enrich the expertise embodied in UIRR, as well as to give it further energy.

Additional Memoranda of Understanding are continuously being developed to continue reinforcing its Member State level network by close collaboration with all organisations committed to advancing Combined Transport.

Partners from among technology suppliers with an interest in intermodal freight transport are regularly sought out to work with UIRR, its members and professional platforms.

Finally, UIRR will continue to collaborate with every European stakeholder and peer group of freight transportation, participate in all initiatives aiming to reach goals that take it closer to achieving the association's declared objectives.



UIRR Board of Director from left to right: Ben Beirnaert, Ralf-Charley Schultze, Rok Svetek, Peter Howald, Marco Gosso, Robert Breuhahn, René Dancet.



From left to right: Ralf-Charley Schultze, Violeta Bulc, Phil Shook (IANA)

Partners and Peers

PARTNERS



MANUFACTURER'S PLATFORM UIRR OPERATORS



GOVERNMENTAL BODIES



European industry associations typically operate in a complex environment, primarily consisting of various governmental bodies, industry association peers and members. In case of UIRR, this is further complicated by the circumstance that UIRR is not a federation, hence it has no national association members. Therefore, UIRR has aimed to structure its collaboration with national associations committed to the promotion of Combined Transport; this increases the outreach to the Member States. For a similar reason, UIRR has decided to engage with the strategically important suppliers of inter-modal technologies - indicated under "Partners" below.

MoU PEERS



Member Companies



New Members



Amber Rail

Amber Rail a.s. is the intermodal train operator of GYSEV CARGO. The company offers a network of intermodal trains, company train services, terminal and warehousing services, last/first mile intermodal trucking and a range of related value added services.

The Amber Rail brand will be coined by the innovation of our employees and the strong service background of our shareholder.



TC Athus

The work of Terminal Container Athus (TCA) consists of managing all the logistics related to the land transport of maritime containers by a combination of rail and road between the North Sea ports and Sarre, Lorraine and Luxembourg (Saar-Lor-Lux) region.

Services offered by TCA include:

- road positioning legs of containers,
- transshipment of containers between road and rail,
- stuffing and unloading containers,
- repairing and conditioning of containers,
- temporary storage depot,
- customs agency, and
- short-term storage of containers.



SRS Terminal

Sindos Railcontainer Services S.A. is a privately-owned railway terminal in Thessaloniki that operates since 2004. Located in a strategic point, the SRS Terminal is 70km from the border with the Former Yugoslav Republic of Macedonia, 15km from the Port of Thessaloniki and 90km from the border with Bulgaria.



Baltic Rail

Baltic Rail is a container-train operator inside the Rail World Group, active on both the European railway gauge 1435 mm and the Russian railway gauge 1520 mm networks.

The company runs container trains along the Baltic-Adriatic Rail Corridor since 2011.

Baltic Rail operates 3 container terminals in Poland:

- container terminal Wrocław Siechnice (located 12 km from Wrocław) and
- container terminal Katowice Włosienica (located 44 km from Katowice and 55 km from Kraków)
- container terminal Mława



CargoBeamer

CargoBeamer builds and markets a Europe-wide network for the transport of non-craneable semi-trailers using unaccompanied Combined Transport. The company is founded on a unique horizontal transshipment technology solution that enables the transshipment of standard or mega trailers, reefer-trailers, tank or silo-trailers to rail.

The "CargoBeamer Alpin" train, which runs daily between Domodossola in Northern Italy and Kaldenkirchen near Venlo on the German-Dutch border, is the company's flagship product.



Delta 3

The Combined Transport terminal operated by Delta 3, near Douges close to Lille and the French-Belgian border, offers connections between three modes: inland waterways, rail and road, and a link to the Eurasian Landbridge.

The terminal's activities encompass last mile rail traction to/from the marshalling yard, handling of reefer units and storage of consignments containing dangerous goods, which constitute one in seven units handled. A technical centre for locomotive and wagon maintenance complements the services of the terminal.

Member Company Information



ADRIA KOMBI d.o.o.

Tivolska 50
SLO - 1000 Ljubljana
Tel.: +386 1 23 45 280
Fax: +386 1 23 45 290
infor@adriakombi.si
www.adriakombi.si

Activities: UCT - RoMo - RSO - RH - ECM
Agency: SI
Total traffic: 290,000 TEU
Revenue: € 42 million

Adria Kombi, which began its operations nearly three decades ago, and presently runs between 25-35 Combined Transport trains daily to/from Slovenia, has obtained the ECM Certificate in 2017. (ECM stands for "Entity in Charge of Maintenance of Freight Wagons".)



SOCIETÀ ALPE ADRIA S.p.A.

Via S. Caterina da Siena, 1
I - 34122 Trieste
Tel./Fax: +39 040 63 92 33
amministrazione@alpeadria.com
www.alpeadria.com

Activities: UCT - RoMo
Agency: IT
Total traffic: 105,000 TEU
Revenue: € 38 million



AMBER RAIL a.s.

Lazaretská 23
SK - 811 09 Bratislava
www.amberrail.com

Activity: UCT
Agencies: HU - RO - SRB - MK
Total traffic: 1,500 TEU
Revenue: € 1 million

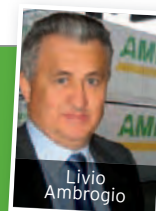


AMBROGIO TRASPORTI S.p.A.

Via Tognasca 5
I - 21013 Gallarate
Tel.: +39 0331 404 500
Fax: +39 0331 776 366
ambrogio@ambrogio.it
www.ambrogio.it

Activities: UCT - TTO - TTM - RH - ECM
Agencies: IT - BE - FR
Total traffic: 85,000 TEU
Revenue: n/a

Ambrogio Trasporti has announced an ambitious investment programme, which will see this committed CT Operator acquire new 45-foot swap bodies, gooseneck trailers and modern tractors to perform road positioning legs, as well as new wagons. The company is also engaged in substantial digitalization effort to streamline its administrative processes. Significant upgrades are planned to the Ambrogio Terminal in Belgium which will result in simultaneous productivity and capacity increases at the facility.



TC ATHUS SA

Rue du Terminal 13
B - 6791 Athus
Tel./Fax: +32 63 380020
infotca@tca.be
www.tca.be

Activities: UCT - TTM - RH
Agency: BE
Total traffic: 65,576 TEU
Revenue: n/a

BALTIC RAIL AS

Tulika 15/17
EE - 10613 Tallinn
Tel./Fax: +372 661 3118
www.balticrail.com

Activity: UCT
Agencies: PL - SLO
Total traffic: 10,321 TEU
Revenue: € 6.6 million



BOHEMIAKOMBI, spol. s r.o.

Opletalova 6
CZ - 113 76 Praha 1
Tel.: +420 2 42 444 560
Fax: +420 2 42 444 924
info@bohemiakombi.cz
www.bohemiakombi.cz

Activity: UCT
Agency: CZ - SK
Total traffic: 18,000 TEU
Revenue: € 5.4 million



CARGOBEAMER AG

Handelsplatz 1b
D - 04319 Leipzig
Tel./Fax: +49 341 652358 0/-29
www.cargobeamer.com

Activity: UCT
Agencies: DE - CH - IT
Total traffic: 10,838 TEU (100% semi-trailer)
Revenue: € 10 million

CFL INTERMODAL

Terminal Intermodal
Eurohub Sud
L - 3434 Dudelange
Tel.: +352 4996-0001
Fax: +352 4996-0150
info@cfl-intermodal.lu
www.cfl-intermodal.lu

Activity: UCT
Agency: LU
Total traffic: 116,200 TEU
Revenue: € 32 million



A major terminal investment was completed in 2017, with the participation of the government of Luxembourg, in Bettembourg. The new terminal facility – opened in June – not only exceeds the capacity of its predecessor, but offers superior productivity translating to quicker processing of intermodal loading units. Based on the new transshipment capacities, CFL Intermodal is engaged in the development of their international network, including an ambitious extension of its Modalohr services.

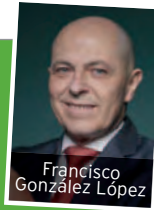


**COMBIBERIA S.A.**

Rafael Herrera, 11 Pta 203
E - 28036 Madrid
Tel./Fax: +34 91 314 98 99
info@combiberia.com
www.combiberia.com

Activity: UCT
Agency: ES
Total traffic: 64,000 UTI
Revenue: € 2.8 million

The Spanish CT Operator celebrated the 25-year Anniversary of its founding. Combiberia offers Spanish connections to/from European terminals.

**COMBINANT NV**

Scheldelaan 800 - haven 755
B - 2040 Antwerpen
Tel./Fax: +32 3 250 62 62
info@combinant.be
www.combinant.be

Activity: TTM
Agency: BE
Total traffic: 138,000 units
Revenue: € 7.6 million

**CROKOMBI d.o.o.**

Ul. A. Hebranga 10
HR - 10000 Zagreb
Tel.: +385 1 61 51 867
Fax: +385 1 61 51 869
crokombi@crokombi.hr
www.crokombi.hr

Activity: UCT
Agency: HR
Total traffic: 22,000 TEU
Revenue: € 1.8 million

**DELTA 3 SPL**

7 Boulevard Louis XIV
F - 59000 Lille
Tel.: +33 3 281 690 70
delta@delta-3.com
www.delta-3.com

Activities: UCT - TTM - ECM
Agency: FR
Total traffic: 320,000 TEU
Revenue: n/a

**EUROPA MULTIPURPOSE TERMINAL (EMT) S.p.A.**

Punto Franco Nuovo - Molo VI
I - 34123 Trieste (TS)
Tel.: +39 040 3220333
Fax: +39 040 3224484
info@emterminals.com
www.emterminals.com

Activities: TTM - UCT
Agency: IT
Total traffic: 64,469 ITU (45' equivalent)
Revenue: € 13 million

**CTE CONTAINER TERMINAL ENNS GmBH**

Ennschafenstrasse 45
A - 4470 Enns
Tel.: +43 7223 81347
customer-service@ct-enns.at

Activity: TTM
Agency: AT
Total traffic: n/a
Revenue: n/a

**FELB**

Rivergate Handelskai 92
Gate 2/3.0G/TOP G
A - 1200 Vienna
Tel.: +43 (1) 890 63 39 0
Fax: +43 (1) 890 63 39 63
sales@felb.world
www.felb.world

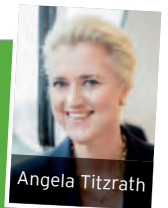
Activity: UCT
Agencies: DE - PL
Total traffic: 70,000 TEU
Revenue: € 180 million

**HAMBURGER HAFEN UND LOGISTIK AG**

Bei St. Annen 1
D - 20457 Hamburg
Tel.: +49 40 3088-0
Fax: +49 40 3088-3355
www.hhla.de

Activities: UCT - TTM - RSO - ECM - RU - CA - RH
Agencies: DE - CZ - SK - SLO - AT - PL - SLO - HU - NL - BE
Total traffic: 1,5 million TEU
Revenue: € 400 million

Hamburg Hafen und Logistik AG (HHLA) has begun restructuring its Combined Transport capacities in 2017 with the integration of Polzug into the Metrans Group. As a next step, HHLA will further strengthen its position by investing € 350 million by the year 2022. HHLA and Metrans place a great emphasis on quality, flexibility and ecological sustainability for a high customer satisfaction.

**HUPAC GROUP**

Viale R. Manzoni 6
CH - 6830 Chiasso
Tel.: +41 588558000
Fax: +41 588558000
info@hupac.com
www.hupac.com

Activities: UCT - TTM - RSO - ECM - RU - CA
Agencies: BE - CH - DE - IT - RO - PL - NL - DK - RUS - ES - AT - HU - SE - NL - RU
Total traffic: 1,37 million TEU
Revenue: € 437 million

The leading European Combined Transport Operator from Switzerland has celebrated the 50th Anniversary of its founding. The company's Chairman, Mr Hans-Jörg Bertschi, has been awarded the LEO award for a lifetime achievement in logistics. Hupac announced the acquisition of intermodal operator ERS Railways, which is also a shareholder of BoxXpress, a large railway operator specialized in maritime inland services.

**IMS CARGO AUSTRIA GmbH**

Trillergasse 8
A - 1210 Wien
Tel.: +43 1 20168 0
Fax: +43 1 20168 8840
sales@imscargo.com

Activity: UCT
Agencies: AT - BE - CH - ES - DE - HU - NL - SK - PT
Total traffic: 62,000 TEU
Revenue: n/a

Member Company Information



JOHN G RUSSELL Ltd.

Deanside Road, Hillington,
Glasgow. G52 4XB UK
Tel./Fax: +44 141 810 8200
sales@johngrussell.co.uk
www.johngrussell.co.uk

Activities: UCT - TTM - RH
Agency: UK
Total traffic: n/a
Revenue: £62 million

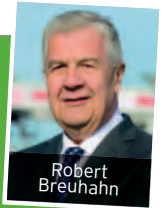


KOMBIVERKEHR GmbH & Co. KG

Zum Laurenburger Hof 76
D - 60594 Frankfurt
Tel./Fax: +49 69 79 50 50
info@kombiverkehr.de
www.kombiverkehr.de

Activities: UCT - TTM - RSO - ECM - RU
Agencies: CZ - DE - ES - IT - NL - SE
Total traffic: 1,920,000 TEU
Revenue: € 447,5 million

Kombiverkehr materially contributed to two projects of the German Ministry for Transport: (i) Participation in several workshops to elaborate the "Master Plan for Freight and Logistics". (ii) Extensive input was provided to the "Development Concept on Combined Transport 2025". This concept, based on a forecast of the combined transport volume by 2025, also defines what additional terminal handling capacity will be required.



Robert Breuhahn



KTL KOMBİ-TERMINAL LUDWIGSHAFEN GmbH

Am Hansenbusch 11,
D - 67069 Ludwigshafen/Rhein
Tel./Fax: +49 621 659 13 0
info@kti-lu.de
www.kti-lu.de

Activity: UCT
Agency: DE
Total traffic: 362,942 Loading Units
Revenue: € 22 million



LINEAS INTERMODAL (IFB nv)

4 Roderveldlaan
B - 2600 Berchem
Tel.: +32 3 270 27 00
Fax: +32 3 226 26 26
info@lineas.net
www.lineasintermodal.net

Activities: UCT - TTM - ECM - CA - RH - RSO
Agencies: BE - DE - IT
Total traffic: 550,000 TEU
Revenue: € 120 million

In 2017, the Belgian combined transport operator and UIRR founding member Interferryboats (IFB) was renamed and became LINEAS Intermodal. As part of the Lineas Group it shares the ambitious goal to realise modal shift, putting its pan-European Green Xpress Network at the core of its offering.



Sam Bruynseels



LUGO TERMINAL S.p.A.

Via della Dogana 5
I - 48022 Lugo (RA)
Tel.: +39 0545 216411
Fax: +39 0545 210987
info@lugoterminal.com
www.lugoterminal.com

Activities: TTM - UCT
Agency: IT
Total traffic: 20,000 TEU
Revenue: € 16 million



MERCITALIA INTERMODAL S.p.A.

Via Valtellina 5-7
I - 20159 Milano
Tel.: +39 02 668 951
Fax: +39 02 668 00 755
info@mercitaliaintermodal.it
www.mercitaliaintermodal.it

Activities: UCT - RSO - ECM
Agency: IT
Total traffic: 565,000 TEU
Revenue: € 200.5 million

In January 2018, the Italian founding Member of UIRR, Cemat, being part of the Mercitalia Group (FS), has been rebranded as Mercitalia Intermodal. The company, which integrated Italcontainer some years ago, is Italy's leading Combined Transport Operator.



Marco Gosso



NAVILAND CARGO SAS

26 Quai Charles Pasqua
CS 10095
F - 92309 Levallois Perret Cedex
Tel.: +33 1 41 05 33 01
Fax: +33 1 40 87 08 20
contact@naviland-cargo.com
www.naviland-cargo.com

Activities: UCT - TTM - RSO - RU
Agency: FR
Total traffic: 300,000 TEU
Revenue: € 110 million

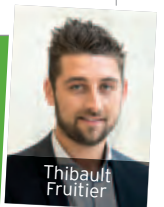


NOVATRANS SAS

10 rue Vandrezanne
CS 91397
F - 75634 Paris Cedex 13
Tel.: +33 1 85 34 49 00
www.novatrans.eu

Activities: UCT - TTM - RSO
Agencies: FR - IT
Total traffic: 276,864 TEU
Revenue: € 74 million

The French Combined Transport Operator and founding member of UIRR, acquired by Groupe Charles Andre in 2013, has celebrated its 50th Anniversary in 2017 by acquiring Greenmodal. The two companies will integrate their operations to further enhance their productivity and service offering towards the CT market.



Thibault Fruitier

Activities - glossary:

UCT: Unaccompanied Combined Transport
RoMo: Rolling Motorway
TTM: Transhipment Terminal Management
RSO: Rolling Stock Operator (owner / lessee)

ECM: Entity in Charge of Maintenance
RU: Railway Undertaking
CA: Customs Agent
RH: Road Haulage



RALPIN AG

Belchenstrasse 3
CH - 4601 Olten
Tel.: +41 58 822 88 88
Fax: +41 58 822 88 80
info@ralpin.com
www.ralpin.com

Activities: RoMo - ECM
Agencies: CH - DE - IT
Total traffic: 218,000 TEU
Revenue: n/a



RAIL CARGO OPERATOR - CSKD

Žerotínova 1132/34
CZ - 130 00 Praha 3
Tel.: +420 220 193 200
www.railcargoooperator.cz

Activities: UCT - TTM - RoMo - RSO
Agencies: CZ - AUT - SK - HU
Total traffic: 949 000 TEU
Revenue: € 244,8 million



RAIL CARGO TERMINAL - BILK Zrt.

Europa utca 4.
H - 1239 Budapest
Tel./Fax: +361 2896000
titkarsag.rct.bilk@railcargo.com
www.railcargobilk.hu

Activity: TTO
Agency: HU
Total traffic: 208,746 TEU
Revenue: € 8.06 million



RAILPORT ARAD SRL

RO 315200 - Curtici FN
P.O. Box 10.
Tel.: +40 357 100 189
Fax: +40 357 100 190
office@railportarad.ro
www.railportarad.ro

Activity: TTM
Agency: RO
Total traffic: 90,000 TEU
Revenue: € 2.5 million

The private Terminal Manager operating in Western Transylvania has completed a major capacity extension project in 2017, which saw the doubling of handling capacity, while contributed to productivity at the same time.



István Wágner



ROCOMBI SA

Blvd. Dinicu Golescu 38
RO - 010873 Bucharest
Tel./Fax: +40 21 312 23 14
office@rocombi.ro
www.rocombi.ro

Activities: TTM - UCT
Agency: RO
Total traffic: 6,500 TEU
Revenue: € 1.5 million



SOPRON TERMINAL (Gysev Cargo Zrt.)

Ipar korut 21
HU - 9400 Sopron
Tel.: +36 99 577 406
Fax: +36 99 577 193
www.gysevcargo.hu

Activity: TTM
Agencies: AT - HU
Total traffic: 26,461 UTI
Revenue: € 0.5 million



SINDOS RAIL SERVICES - SRS S.A

Industrial Area of Thessaloniki
GR - 570 22 Sindos, P.O. Box 1099
Tel.: +30 2310576991
Fax: +30 2310576997
Antonia.Giannakopoulou@srs-sa.gr

Activity: TTM
Agency: GR
Total traffic: n/a
Revenue: n/a



T3M

11 rue Maryse Bastié - ZI de la Lauze
F - 34430 St Jean de Vedas
Tel: +33 4 67 27 18 51
info@t3m.fr
www.t3m.fr

Activities: UCT - TTM - RH - RSO
Agencies: FR - IT
Total traffic: 243,000 TEU
Revenue: n/a

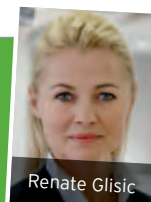


ÖBB-INFRA AG - TSA

Praterstern 3
A - 1020 Wien
Tel./Fax: +43 1 93000 31169
terminal@oebb.at
infrastruktur.oebb.at

Activities: UCT - RoMo - TTM
Agencies: AT
Total traffic: n/a
Revenue: n/a

Terminal Service Austria, belonging to ÖBB Infrastructure, is the manager of eight Combined Transport terminals in Austria. In 2017, TSA opened its new facility called Cargo City Vienna South in Inzersdorf, located at the crossing of three EU Rail Freight Corridors and offers superior capacity, productivity and connections.



Renate Glisic



TRANS EURASIA LOGISTICS GmbH (TEL)

Bellevuestraße 3
D - 10785 Berlin
Tel./Fax: +49 30 297 54 804
www.trans-eurasia-logistics.com

Activity: UCT
Agencies: DE - CN - RU
Total traffic: 45,733 TEU
Revenue: n/a

Countries: AM (=Albania), AT, AZ (=Azerbaijan), BE, BG, BIH (=Bosnia), BZ (=Belarus), CH, CZ, DK, DE, EE, EL, ES, FI, FR, GE (=Georgia), HR, HU, IE, IT, LT, LU, LV, ME (=Crna Gora), NL, PL, PRC (=China), PT, RO, RS (=Serbia), RU (=Russia), SI, SK, SE, TR, UK
UIRR Consignment: corresponds to the transport capacity of one tractor-trailer combination on the road (equivalent to 2.0 EVP/TEU). A TEU (twenty-foot equivalent) is a unit of measurement corresponding to an ISO container of 20 feet in length (6.10m), used to express traffic capacities or flows, principally in the maritime transport sector.

Partners of UIRR



DEN HARTOGH

DEN HARTOGH LOGISTICS is one of the leading Logistics Service Providers to convey safely bulk liquids and gases for the chemical industry. The company preferably develops smart logistics solutions based on intermodal routings with inland and railway journeys.



ERMEWA

ERMEWA is a European leader in rail wagon leasing with the aim of ensuring the success of a rail-based supply chain. The company offers a fleet of over 45,000 railcars, which includes a high number of specialised equipment for Combined Transport, to freight forwarders, CT Operators, railways and industrial companies.



HACON

HACON provides cutting-edge software solutions for public transportation, mobility and logistics. The consulting department assists its customers with projects in rail freight transport and Combined Transport in particular.



KRONE

KRONE is a leading global manufacturer of commercial road equipment for all types of goods. It is also specialised in the design of compatible loading units for the railway systems such as craneable semi-trailers for pocket wagons used in Combined Transport.



LIS

LIS AG is a leading company in Transport-Management-Software for logistics, forwarding agencies and shipping. The proposed solutions integrate all intermodal capabilities, especially all data and interfaces needed to improve the visibility of the railway system.



LOHR INDUSTRIE

LOHR is a private French group specialised in the design, manufacturing and marketing of goods transport systems, in particular the Modalohr railway freight solution for the transportation of standard semi-trailers on wagons.



MODALIS

MODALIS is known as a major actor in rental, trading and consulting in the intermodal sector. It is a specialized company in intermodal equipment rental such as loading units (containers for general cargo, gas and liquid tanks, dry bulk containers and chassis) and railway cars.



SCHMITZ-CARGOBULL

SCHMITZ-CARGOBULL AG manufactures trailers and semi-trailers for commercial road vehicles. The Company offers an extensive range of equipment for all types of cargo and for all types of forwarding systems, in particular the design of intermodal loading units such as craneable trailers compatible with rail wagons.



TIRSAN

TIRSAN TREYLER is the market leader in the Turkish semi-trailer industry and proposes the widest product range for the Asian and European market. It produces road equipment, such as craneable semi-trailers, compatible with intermodal transport.



UNIT45

UNIT45 concentrates its activities on the development, construction, financing and delivery of 45-foot containers meeting the specific requirements of the client. The 45-foot container concept is considered to be the most efficient solution in European intermodal logistics.



VTG RAIL EUROPE

VTG is the largest private wagon leasing company in Europe with 80,000 freight wagons made up of about 1,000 different wagon-types. A large portion of the VTG fleet are intermodal wagons designed for the transport of containers, swap bodies and craneable semi-trailers.



WECON

WECON is a specialist in commercial vehicles and container technology for the transportation of goods by road and rail. The company is one of the leading manufacturers of swap bodies and trailers for intermodal transport.

MoU Peers



ASSOFERR

ASSOFERR is the result of the merger of the two Associations ASSOCARRI and SUNFER on 27 November 2000, which until then represented the interests of the operators in the "private railway wagons" sector. Since 2002 ASSOFERR has also collected the inheritance of ASSOCOMBI.



ASSOLOGISTICA

Founded in 1947, **Assologistica** is the association of logistics companies, general warehouses and refrigerators, port terminal operators, intermodal terminals and airports in Italy. With the establishment of its territorial representatives and with the meeting between the logistics infrastructure managers and the third-party contractors who use them, Assologistica guarantees a 360° logistic integration.



BIC

The Bureau of International des Containers (**BIC**) was founded in 1933 as a neutral, non-profit, international organization whose mission is to promote the safe, secure and sustainable expansion of containerization and intermodal transportation. With a mission to promote the safe, secure and sustainable expansion of intermodal transportation, BIC enables professional dialogue amongst its members, standards bodies, governments and other industry organizations.



COMBINET

CombiNet was founded in 2007 by more than 30 companies from all sectors of combined transport in Austria: freight forwarders, freight forwarders, CT operators, terminals, ports, railway companies, manufacturers of handling equipment and equipment. The association's mission is to represent the interests of combined transport, strengthen networking between members, provide information to the media and the public and improve the conditions for CT.



ECTA

ECTA, the European Chemical Transport Association, speaks for the chemical transport industry to all its stakeholders and organises the Responsible Care Initiative for the European land transport industry. The association provides the chemical transport industry - including several intermodal shippers - with a voice at the EU level.



GNTC

Groupe National des Transport Combinés, **GNTC**, is the professional organization of Combined Transport stakeholders exploiting the technique of combined rail-road, river-road transport by swap bodies, containers and semi-trailers in France. The objectives of the GNTC are to defend the interests of its members and promote combined transport with the European Community, public authorities (both at national and regional level), transport, shippers and the general public



GROUPEMENT FER

Groupeement Fer brings together Swiss freight forwarding and logistics companies with the common goal to handle the transport of goods between the North Sea and Mediterranean ports and Switzerland, as much as possible, by using the environmentally friendly railway mode which includes Combined Transport in particular.



IANA

The Intermodal Association of North America, **IANA**, is the only organization that represents the combined interests of the intermodal freight transportation industry in North America. IANA promotes the benefits of intermodal freight transportation and educates industry stakeholders, provides a neutral forum for discussion and positively influences the legislative and regulatory environment.



IBS

The International Rail Freight Business Association (**IBS**) aims to create framework conditions that will promote the position of companies interested in rail freight, including Combined Transport, and to improve the competitive conditions of rail freight in Europe. Promoting and improving the capacity of railways, standardization and simplification of its legal and business foundations, bundling of users of European rail freight traffic.



KNV

KNV, The Royal Dutch Transport Federation (Koninklijk Nederlands Vervoer) is the Dutch umbrella organization for professional passenger transport and rail freight in the Netherlands. KNV Rail Freight Transport promotes the use of more rail freight, including Combined Transport, in order to make Dutch transport and logistics more sustainable and safe.



MLSZKSZ

The Association of Hungarian Logistics Service Centres (**MLSZKSZ**) is one of the most significant associations of logistics and transport in Hungary, connecting almost 90% of the logistics service centres in the country. As opposed to other organisations which only deal with certain segments of logistics, MLSZKSZ is the only association in Hungary that represents all aspects of the service chain, including numerous intermodal stakeholders.



SGKV

Since 1928 the Studiengesellschaft für den Kombinierten Verkehr e.V. (**SGKV**) roughly translated as German Promotion Centre for Intermodal Transport, is active on behalf of the interests of intermodal transport chains. The association aims at strengthening and to developing Combined Transport further through bringing together research and practice.

Performance

Statistics 2017



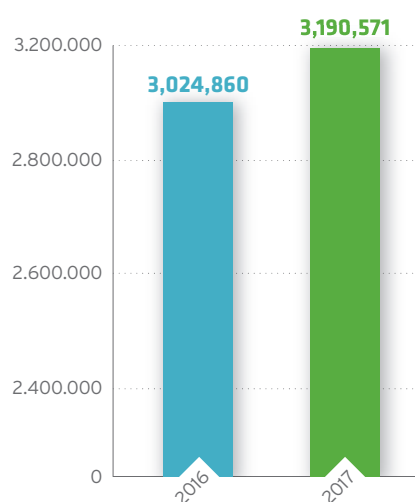


Summary

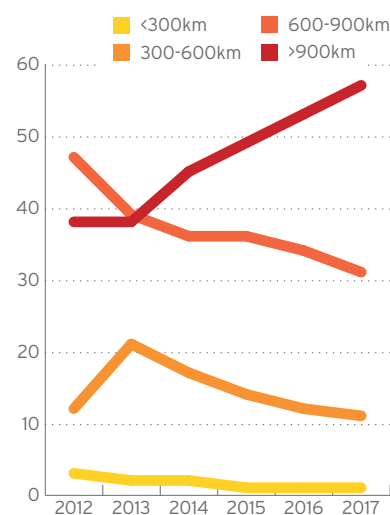
European Combined Transport closed a year of robust growth in 2017: the total number of consignments transported by UIRR operator members increased by +5.48%, whereas output when expressed in tonne-kilometres grew by +8.7%. Cross-border services have expanded handsomely by +8.83%, while domestic relations grew by +7.93%. Within the cross-border relations, the extra-EU - transcontinental - services expanded by 38%, while intra-european traffic delivered a healthy +5% growth.

	Cross-border			Domestic			Total		
	2016	2017	2017/2016	2016	2017	2017/2016	2016	2017	2017/2016
Number of consignments	2,075,709	2,153,563	3.75%	949,151	1,037,008	9.26%	3,024,860	3,190,571	5.48%
containers	1,559,213	1,651,506	5.92%	860,373	954,711	10.96%	2,419,586	2,606,217	7.71%
(craneable) semi-trailers	391,389	372,826	-4.01%	79,146	73,453	-7.19%	470,535	446,279	-5.15%
complete trucks (RoLa)	125,107	129,231	3.30%	9,632	8,844	-8.18%	134,739	138,075	2.48%
Average distance	1,067	1,120	5.00%	491	492	0.20%	878	944	7.48%
Billion tkm	50.26	54.70	8.83%	8.70	9.39	7.93%	58.96	64.09	8.70%
Number of TEU	4,151,418	4,307,126	3.75%	1,898,301	2,074,015	9.26%	6,049,719	6,381,141	5.48%

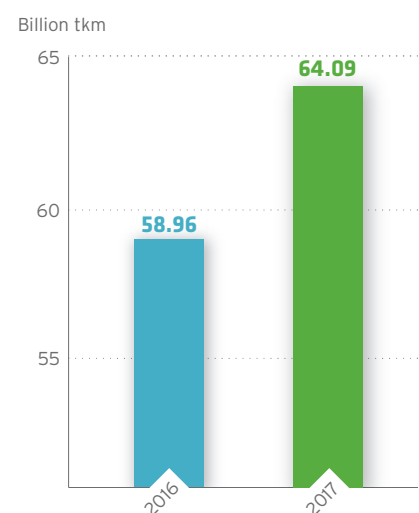
Consignments 2016-2017



Distance Matrix



Tonne-kilometres 2016-2017



Evolution of Combined Transport Traffic

1990 - 2017

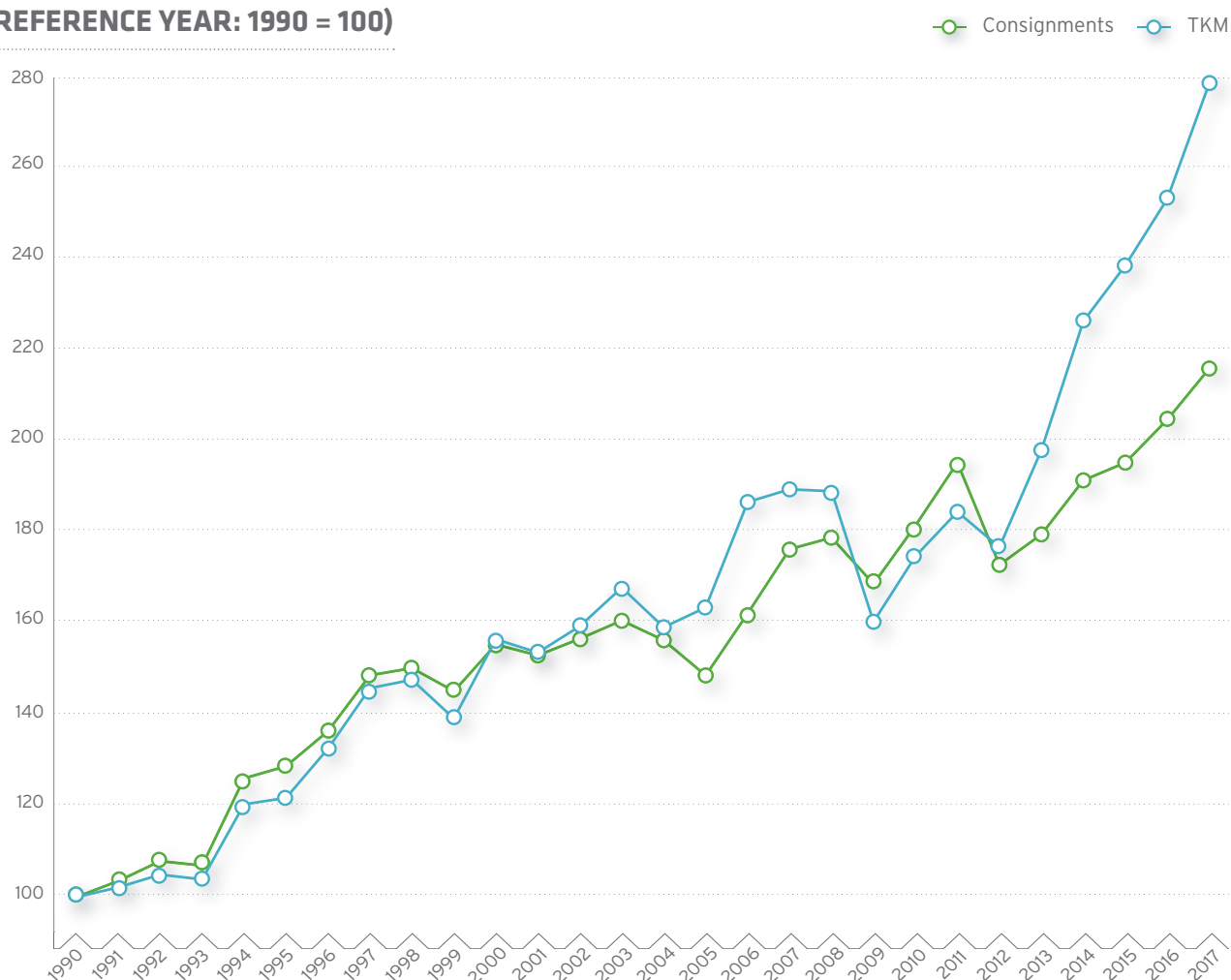
COMBINED TRANSPORT								
	1990	1995	2000	2005	2006	2007	2008	2009
Number of consignments	1,183,361	1,615,364	1,967,072	2,457,579	2,717,751	2,952,543	2,994,625	2,818,349
swap bodies and containers	727,275	1,078,979	1,334,377	1,977,630	2,135,976	2,341,690	2,318,990	2,182,569
(craneable) semi-trailers	241,816	224,029	172,275	164,269	199,800	220,970	246,690	219,800
complete trucks (RoLa)	214,270	312,356	460,420	315,680	381,975	389,883	428,945	415,980
Total billion tkm	18.68	24.97	35.18	38.84	45.39	46.07	45.97	38.90
< 300 km	1%	2%	2%	3%	3%	3%	3%	4%
300 km - 600 km	35%	37%	28%	11%	12%	15%	17%	16%
600 km - 900 km	33%	19%	43%	52%	41%	41%	35%	36%
> 900 km	31%	42%	27%	34%	44%	41%	45%	44%

⁽¹⁾ Data without Ökombi - Hungarokombi (RoLa operators) | ⁽²⁾ From 2013 figures including traffic of new members TEL and FELB

⁽³⁾ From 2015 figures including RCO CZ | ⁽⁴⁾ From 2016 with RCO HU | ⁽⁵⁾ From 2017 figures including Amber Rail, Baltic Rail and Lugo

UIRR CT Growth Index - Consignments and Tonne-Kilometres

(REFERENCE YEAR: 1990 = 100)



The UIRR CT Growth Index (Consignments and Tonne-Kilometres) is a time series of year-on-year growth rates of the number of consignments transported and the tonne-kilometres realised by UIRR members over the years, which has been neutralised of membership effects (of companies joining or leaving the association); hence the growth rate of only those members were taken into account in one year that were able to provide data for the previous year as well. It is assumed that prevailing UIRR membership in any year since 1990 has been representative of the trends of the entire European CT sector.

2010	2011	2012 ⁽¹⁾	2013 ⁽²⁾	2014 ⁽³⁾	2015 ⁽³⁾	2016 ⁽⁴⁾	2017 ⁽⁵⁾	% 17/16
3,030,865	3,075,808	2,529,264	2,645,950	2,819,606	2,876,585	3,024,860	3,190,571	5.48%
2,281,746	2,330,918	2,067,488	2,134,004	2,302,831	2,348,762	2,419,586	2,606,217	7.71%
300,867	318,567	333,597	375,432	362,654	382,250	470,535	446,279	-5.15%
448,252	426,323	128,179*	136,514	154,121	145,573	134,739	138,075	2.48%
42.37	42.58	39.08	40.74	52.17	54.98	58.96	64.09	8.70%
5%	7%	3%	2%	2%	1%	1%	1%	=
16%	12%	12%	21%	17%	14%	12%	11%	↓
42%	44%	47%	39%	36%	36%	34%	31%	↓
37%	37%	38%	38%	45%	49%	53%	57%	↑

Analysis

Overall: The UIRR CT Growth Index shows - see graph on p.34 - that Combined Transport performance has more than doubled in terms of consignments, whereas the growth rate when measured in tonne-kilometres was over 280%. Development has been unabated, despite disturbances in 1998-1999 (enlargement of trucks defined in Directive 96/53, appearance of cheaper East European drivers and road cabotage liberalization result in a substantial price drop in road haulage), 2003-2005 (EU enlargement suddenly opens the market to East European road hauliers, who take advantage of inefficient enforcement of road cabotage, which caused a second price drop of freight rates), and 2009-2013 (the double dips of the global financial and European economic crisis). From 2013, the inclusion of longer and heavier cross border transports, the slow recovery of the European economy and decline of shorter haul domestic traffic defines the trend.

By type of loading unit: The transport of complete trucks, or RoLa (accompanied Combined Transport), once over 12% of total CT traffic, has halved in its weight, while the proportion of consignments utilising a craneable semi-trailer increased to about 14% by 2017 (decrease of 2% compared to 2016 as a direct consequence of the Rastatt incident). The proportion of containers and swap bodies continues its growth with about 82% of all UIRR consignments.

Prominent CT-relations: The most important routes of unaccompanied Combined Transport are the ones connecting the North-west Europe with South Europe (transalpine corridors with more than 50% of the total volume). RoLa is focused on Transalpine routes. Traffic is dynamically developing on Western-Eastern relations, and even more within the Eastern countries and along the intercontinental routes towards China, Russia and Turkey.

Details of 2017: The UIRR member CT operators realized an increase in consignments on cross-border relations (+3.75%) as well as on domestic routes (+9.26%). The unaccompanied Combined Transport (UCT) with containers and swap bodies could increase its share in 2017 (+7.71%) on both cross-border and domestic relations with respectively +5.92% and +10.96% while the use of semi-trailers was reduced by 5.15% compared to 2016 (direct impact of the Rastatt incident). The transfer of complete trucks (RoLa) closed the year with an overall positive result of 2.48%.

The best performing relations in relative terms during 2017 were:

- Belarus vv Germany +3,888% (+ 7,000 consignments)
- Belgium vv Sweden +2,143% (+ 5,000 consignments)
- Croatia vv Hungary +191% (+9,000 consignments)
- Austria vv Belgium +90% (+ 2,000 consignments)

The best performing relations in absolute terms during 2017 were:

- Russia vv Slovakia (new relation) with a traffic of more than 40,000 units
- Hungary vv Slovenia +26,000 consignments (+78%)
- Belgium vv France +15,000 consignments (+34%)
- Belgium vv Spain +15,000 consignments (+49%)
- China vv Germany +14,000 consignments (+40%)

Declines have been recorded on the following relations:

- Austria vv Hungary -95% (- 9,000 consignments)
- Czechia vv Germany -27% (-18,000 consignments)
- Switzerland vv Germany -13% (-7,000 consignments)
- Belgium vv Italy -3% (- 7,000 consignments)

General Considerations

A UIRR consignment corresponds to the transport capacity of one full size truck on road (equivalent to 2 TEU), meaning:

- one semi-trailer;
- two swap bodies less than 8.30 m and under 16t;
- one swap body more than 8.30 m or over 16t;
- one vehicle on the Rolling Motorway (RoLa).

The UIRR statistics include only the rail section of the Road-Rail Combined Transport chain (terminal to terminal).

Abbreviations

C	consignments
CT	Combined Transport
RoLa	rolling motorway
SB	swap body
ST	semi-trailer
t	tonnes
TEU	twenty-foot equivalent unit
tkm	tonne-kilometre

Country Matrix (excluding pre- and post haulage by road)

Relations		Consignments C	Consignments-km S*km	Average Distance	Average Weight t/C	Gross Weight t	Tonne-km 1,000 tkm	Techniques, % consignments			
from	to							ST	SB/CT	SB/CT	RoMo
Country									<8,30m	>8,30m	
AT	BE	1,895	2,276,871	1,202	14	26,041	31,297		14%	86%	
BE	AT	2,146	2,583,887	1,204	26	54,882	66,097		22%	78%	
AT	DE	26,040	25,144,727	966	24	618,760	597,814	23%	30%	47%	
DE	AT	36,395	35,489,576	975	25	922,566	890,621	18%	37%	45%	
AT	ES	12	22,740	1,895	30	356	676			100%	
AT	FR	183	366,000	2,000	29	5,248	10,497			100%	
FR	AT	18	36,000	2,000	18	330	659			100%	
AT	IT	9,209	3,618,211	393	24	222,765	87,959	28%	23%	36%	13%
IT	AT	6,349	2,740,980	432	21	133,699	60,543	39%	14%	31%	16%
AT	NL	441	491,388	1,116	26	11,273	12,573	3%	46%	51%	
NL	AT	668	834,429	1,250	25	16,796	20,995		50%	50%	
AT	SI	28,095	8,708,931	310	30	846,873	269,491		53%		47%
SI	AT	19,245	5,933,091	308	34	652,342	211,287		30%		70%
AT	SK	33	2,376	72	25	833	60		21%	79%	
SK	AT	15	1,044	72	26	375	27		31%	69%	
AT	TR	8	27,540	3,443	7	55	191		100%		
BE	BG	118	291,578	2,471	29	3,375	8,340		100%		
BG	BE	59	145,640	2,490	7	418	1,041		100%		
BE	CH	16,476	11,888,637	722	22	369,519	264,796		65%	35%	
CH	BE	16,101	11,586,988	720	14	220,104	158,920		62%	38%	
BE	CZ	367	356,971	974	14	5,303	5,165		34%	66%	
CZ	BE	264	257,136	974	18	4,768	4,644		44%	56%	
BE	DE	12,678	7,892,123	623	24	306,754	191,202	5%	61%	34%	
DE	BE	14,308	10,001,216	699	20	281,055	196,934	3%	67%	30%	
BE	ES	16,533	24,374,304	1,474	28	464,505	684,771		55%	45%	
ES	BE	27,200	41,069,621	1,510	20	535,650	814,600		72%	28%	
BE	FR	31,851	20,472,110	643	18	563,000	331,261		36%	64%	
FR	BE	28,683	19,305,329	673	20	565,819	370,894		40%	60%	
BE	IT	119,113	133,971,898	1,125	26	3,039,399	3,408,708	17%	24%	59%	
IT	BE	111,307	130,083,867	1,169	22	2,498,203	2,917,199	17%	21%	62%	
BE	KZ	28	38,248	1,366	28	770	1,052	5%	60%	35%	
KZ	BE	58	179,737	3,099	21	1,241	3,846		100%		
BE	LT	10	21,856	2,186	10	96	210		94%	6%	
LT	BE	5	11,875	2,375	16	80	190		100%		
BE	LU	15,780	5,096,380	323	21	332,449	106,248	3%	25%	72%	
LU	BE	13,372	4,329,718	324	15	201,005	65,867	3%	59%	38%	
BE	NL	56	6,156	111	21	1,188	132		98%	2%	
NL	BE	7	700	100	7	51	5		43%	57%	
BE	PL	4,435	5,378,189	1,213	28	125,702	152,435		53%	47%	
PL	BE	3,227	4,565,335	1,415	16	50,063	70,837		58%	42%	
BE	RO	12,110	20,598,122	1,701	23	283,329	481,500	18%	15%	67%	
RO	BE	10,579	18,043,617	1,706	20	207,614	351,626	16%	6%	78%	
BE	RU	351	862,056	2,456	30	10,704	26,289		70%	30%	
RU	BE	319	711,151	2,229	17	5,561	12,397		97%	3%	
BE	SE	2,807	3,001,913	1,069	20	56,294	60,203	6%	37%	57%	
SE	BE	2,330	2,597,409	1,115	15	34,263	38,195	4%	11%	85%	
BG	RO	68	47,553	699	8	555	388		96%	4%	
RO	BG	142	126,099	888	28	4,046	3,593		99%	1%	
BY	DE	3,806	4,167,570	1,095	16	59,616	65,280		21%	79%	
DE	BY	3,213	3,487,847	1,086	16	50,098	54,266		19%	81%	
BY	PL	8	2,672	334	22	179	60		75%	25%	
PL	BY	760	394,026	518	11	8,426	4,368		21%	79%	
CH	DE	17,576	11,017,230	627	16	276,581	175,372	23%	55%	22%	
DE	CH	28,100	17,933,415	638	25	701,289	445,488	14%	61%	25%	
CH	DK	5	5,466	1,215	25	110	134		100%		
DK	CH	28	32,948	1,177	7	206	242		100%		
CH	ES	112	202,888	1,812	27	2,997	5,429		100%		
CH	FR	11	14,361	1,306	14	159	208		100%		
CH	IT	1,282	358,006	279	12	15,340	4,284	3%	51%	46%	
IT	CH	2,129	649,568	305	24	50,464	15,397	4%	55%	41%	
CH	NL	6,958	6,335,802	911	20	138,850	126,432	1%	69%	30%	
NL	CH	7,802	7,016,860	899	20	153,326	137,898		65%	35%	
CH	NO	29	52,142	1,798	30	863	1,552	100%			
NO	CH	33	59,334	1,798	19	635	1,142	64%	36%		
CH	SE	3	3,662	1,221	29	87	106	67%	33%		
SE	CH	2	3,527	1,764	26	52	92		100%		
CN	DE	30,695	329,275,000	10,727	21	639,855	6,893,217		10%	90%	
DE	CN	19,887	211,439,000	10,632	20	406,031	4,360,000		10%	90%	
CZ	PL	228	156,975	690	15	3,413	2,355		50%	50%	
CZ	SI	6,003	5,129,023	854	14	83,220	71,104		100%		
SI	CZ	5,922	5,061,297	855	13	79,757	68,166		100%		
CZ	DE	24,655	19,731,291	800	17	411,462	324,664	19%	48%	33%	
DE	CZ	24,741	20,045,764	810	20	504,146	397,736	24%	42%	34%	
CZ	PL	463	319,125	690	15	6,938	4,787		50%	50%	
PL	CZ	854	588,915	690	15	12,803	8,834		50%	50%	
CZ	SK	11	7,878	716	29	314	225		100%		
DE	DK	2,358	2,119,256	899	30	71,504	64,276	2%	46%	52%	
DK	DE	1,601	1,010,545	631	5	8,521	5,380		27%	73%	
DE	ES	23,173	34,709,927	1,498	26	602,474	901,686		78%	22%	
ES	DE	29,360	39,988,457	1,362	18	528,518	719,845		95%	5%	
DE	FR	9,823	10,529,896	1,072	26	259,068	279,149		58%	42%	
FR	DE	9,456	9,600,727	1,015	20	188,549	188,096		60%	40%	
DE	GR	914	2,206,647	2,416	28	25,143	60,735	5%	85%	10%	
DE	HU	16,749	21,942,551	1,310	23	384,966	501,396	19%	41%	40%	
HU	DE	5,617	6,784,861	1,208	21	117,959	143,052	52%	16%	32%	
DE	IT	376,565	306,501,237	814	28	10,454,029	8,425,054	31%	29%	26%	14%
IT	DE	274,691	219,059,120	797	23	6,269,250	4,771,154	28%	24%	29%	29%
DE	KZ	14	67,550	4,825	26	368	1,774	11%	51%	38%	
KZ	DE	89	440,596	4,951	26	2,357	11,670		100%		
DE	LT	4	5,435	1,359	8	30	41		94%	6%	
DE	NL	53,981	28,688,567	531	23	1,223,822	651,846	11%	45%	44%	
NL	DE	48,020	20,721,931	432	20	965,415	429,460	1%	45%	54%	
DE	NO	767	1,107,691	1,444	25	19,033	27,602		69%	31%	
NO	DE	444	613,076	1,381	25	11,065	15,377	2%	65%	33%	
DE	PL	20,443	16,932,148	828	24	487,338	414,503	8%	42%	50%	
PL	DE	19,615	17,605,962	898	12	241,340	224,576	7%	43%	49%	
DE	PT	149	387,627	2,610	26	3,920	10,232		56%	44%	
PT	DE	89	244,279	2,760	6	564	1,558		27%	73%	
DE	RO	1,605	2,044,077	1,274	29	46,368	59,053	3%	53%	44%	
RO	DE	891	966,688	1,085	9	7,772	8,432		90%	10%	
DE	RS	89	213,005	2,393	10	862	2,026	11%	52%	37%	
RS	DE	260	120,726	464	23	6,050	2,809		97%	3%	
DE	RU	2,455	4,960,106	2,020	17	42,518	79,391		40%	60%	
RU	DE	2,219	5,129,969	2,312	18	39,687	91,085		12%	88%	
DE	SE	26,211	25,030,743	955	25	651,615	622,775	61%	17%	22%	
SE	DE	23,361	23,998,099	1,027	21	495,405	507,869	69%	14%	17%	
DE	SI	1,772	1,727,218	975	32	56,450	55,024		68%	32%	
SI	DE	1,909	1,446,144	758	8	15,902	12,046		86%	14%	

Relations		Consignments C	Consignments-km S*km	Average Distance	Average Weight t/C	Gross Weight t	Tonne-km 1,000 tkm	Techniques, % consignments			
from	to							ST	SB/CT	SB/CT	RoMo
Country									<8,30m	>8,30m	
DE	SK	243	473,690	1,949	22	5,414	10,553		98%	2%	
SK	DE	47	65,005	1,383	8	373	516		100%		
DE	TR	4,395	13,190,990	3,002	26	115,351	345,523		74%	26%	
TR	DE	3,012	9,297,672	3,087	12	37,448	115,267		67%	33%	
DE	UZ	9	4,191	466	27	239	111	11%	51%	38%	
DE	YO	2	3,500	1,750	21	42	73		100%		
YO	DE	2	3,210	1,605	9	19	30		100%		
DK	IT	4,311	5,082,256	1,179	30	127,679	150,522	42%	11%	47%	
IT	DK	4,414	6,439,993	1,459	27	119,188	173,895	36%	18%	46%	
ES	IT	2,355	2,594,761	1,102	27	64,158	70,690		77%	23%	
IT	ES	1,303	1,481,261	1,137	23	30,376	34,545		71%	29%	
ES	NL	194	317,290	1,636	12	2,276	3,723		45%	55%	
NL	ES	410	716,378	1,749	27	11,219	19,627		89%	11%	
ES	PL	94	133,198	1,417	23	2,193	3,107		54%	46%	
PL	ES	160	217,573	1,364	18	2,929	3,996		53%	47%	
ES	RO	54	183,330	3,395	29	1,549	5,258		100%		
ES	RU	5	6,983	1,397	31	154	215		54%	46%	
RU	ES	2	750	375	30	59	22		97%	3%	
ES	SE	1	983	983	25	25	24		54%	46%	
FR	IT	20,169	18,262,722	905	26	516,910	467,723		16%	84%	
IT	FR	31,962	28,801,622	901	19	621,081	564,276	2%	65%	33%	
FR	LU	8,859	3,420,631	386	21	187,255	65,848	52%	20%	28%	
LU	FR	9,683	3,786,817	391	26	250,864	106,402	48%	33%	19%	
FR	NL	2,231	2,782,667	1,248	15	33,963	42,682		85%	15%	
NL	FR	2,433	3,018,081	1,240	25	61,487	64,165		57%	43%	
FR	PL	66	23,364	354	31	2,041	722		58%	42%	
PL	FR	31	49,105	1,610	4	121		11%	51%	38%	
GR	HU	2,865	4,870,500	1,700	16	46,129	78,420		50%	50%	
HU	GR	1,923	3,268,250	1,700	11	21,784	37,033		50%	50%	
HR	HU	6,281	3,826,133	609	7	43,067	26,477		61%	39%	
HU	HR	7,267	4,428,937	609	10	69,545	43,635		49%	51%	
HR	RS	604	362,400	600	13	7,852	4,711		42%	58%	
RS	HR	719	431,400	600	14	10,369	6,040		38%	62%	
HR	SI	481	139,490	290	14	6,734	1,953		48%	52%	
SI	HR	220	16,405	75	15	3,278	244		58%	42%	
HU	AT	444	202,020	455	4	1,679	764		50%	50%	
HU	BG	3	3,876	1,292	4	11	14		50%	50%	
HU	IT	2,862	2,051,257	717	13	37,924	29,645		48%	52%	
IT	HU	2,617	1,856,376	709	17	43,205	29,826		48%	52%	
HU	NL	695	1,103,547	1,588	23	15,885	25,223		50%	50%	
NL	HU	1,573	2,161,365	1,374	24	37,942	52,132		58%	42%	
HU	RO	2,935	2,470,203	842	24	69,998	56,948		68%	32%	
RO	HU	1,835	1,289,943	703	5	9,557	7,066		50%	50%	
HU	RS	510	228,751	449	9	4,764	2,152		53%	47%	
RS	HU	150	66,343	444	18	2,630	1,164		50%	50%	
HU	RU	102	183,600	1,800	6	630	1,135		50%	50%	
RU	HU	159	292,002	1,836	24	3,887	7,150		52%	48%	
HU	SI	20,325	13,576,408	668	13	261,167	174,187		77%	23%	
SI	HU	38,442	25,902,184	674	16	627,065	421,660		78%	22%	
HU	UA	180	4,000	22	18	3,317	74		45%	55%	
IT	BY	129	122,624	951	20	2,555	2,429	11%	51%	38%	
IT	LT	1	879	879	23	23	20		94%	6%	
LT	IT	56	86,128	1,538	30	1,682	2,586		100%		
IT	LU	7,614	9,334,764	1,226	17	132,135	161,998	98%		2%	
LU	IT	7,604	9,322,504	1,226	24	184,760	226,515	98%		2%	
IT	NL	57,413	69,633,411	1,213	22	1,291,401	1,565,513	20%	33%	47%	
NL	IT	60,779	62,265,640	1,024	27	1,629,323	1,663,853	10%	40%	50%	
IT	PL	329	280,093	851	25	8,125	6,917		10%	90%	
PL	IT	44	42,803	973	27	1,190	1,158		9%	91%	
IT	RO	2,692	4,087,394	1,518	25	66,516	100,994	6%	1%	93%	
RO	IT	2,860	4,289,140	1,500	10	29,205	43,807	5%		95%	
IT	RU	1	1,061	1,061	32	32	34		100%		
RU	IT	32	62,572	1,955	29	925	1,808		97%	3%	
IT	SE	1,962	3,582,217	1,826	27	52,735	96,303	36%	18%	46%	
SE	IT	7,221	10,962,381	1,518	31	225,519	342,537	49%	20%	31%	
IT	TR	1,898	3,813,922	2,009	27	51,751	103,991	2%	17%	81%	
TR	IT	1,946	3,968,400	2,039	5	9,333	19,032		23%	77%	
KZ	PL	14	59,598	4,257	8	105	447		100%		
PL	KZ	10	47,400	4,740	27	270	1,281		100%		
LT	PL	30	11,250	375	20	597	224		93%	7%	
PL	LT	331	234,348	708	18	6,088	4,310		94%	6%	
NL	PL	455	571,307	1,257	15	6,610	8,308		53%	47%	
PL	NL	298	342,091	1,150	11	3,225	3,708		58%	42%	
NL	RO	855	1,167,247	1,366	29	24,422	33,360	35%	10%	55%	
RO	NL	119	108,189	909	11	1,308	1,189		90%	10%	
NL	RS	171	219,393	1,283	29	4,885	6,267		100%		
RS	NL	11	5,747	522	18	199	104		97%	3%	
NL	RU	129	17,321	134	31	3,952	531		100%		
NL	SE	5	4,792	958	29	145	139		60%	40%	
SE	NL	18	16,333	933	10	183	171		31%	69%	
NO	IT	6	4,320	720	32	193	139	42%	11%	47%	
PL	RU	200	473,800	2,369	27	5,316	12,593		100%		
RU	PL	99	245,663	2,481	10	1,020	2,530		97%	3%	
PL	SE	15	24,150	1,610	4	59	96		60%	40%	
SE	PL	22	39,710	1,805	31	680	1,228	31%	37%	32%	
PL	SI	2,167	2,195,171	1,013	15	32,505	32,928		5%	95%	
SI	PL	2,985	3,023,805	1,013	20	59,700	60,476		5%	95%	
PL	UZ	1	375	375	26	26	10		100%		
RO	AT	15	9,640	643	3	49	32		90%	10%	
RO	UA	20	22,456	1,123	8	167	187		45%	55%	
UA	RO	28	37,660	1,345	26	731	984		41%	59%	
RS	SI	159	84,976	534	3	544	291		100%		
SI	RS	200	86,320	432	20	3,914	1,689		100%		
RU	SK	19,945	38,892,750	1,950	15	299,175	583,391		50%	50%	
SK	RU	20,243	39,473,850	1,950	15	303,645	592,108		50%	50%	
SE	NO	2	1,080	540	28	56	30	31%	37%	32%	
SI	IT	365	96,572	265	3	1,109	293		100%		
SI	MK	1	949	949	5	5	5		100%		
SI	SK	14,748	11,768,167	798	13	186,031	148,444		100%		
SK	SI	14,218	11,147,901	784	9	129,357	98,484		89%	11%	
SK	GR	1,974	3,667,692	1,858	15	29,610	55,015		50%	50%	
UA	DE	1	1,345	1,345	7	7	10		46%	54%	
UZ	BE	6	32,328	5,388	7	41	222		100%		
TOTAL		2,153,563	2,481,072,816	1,120	23	48,837,127	54,699,965	17%	38%	39%	6%

Terminals

TRANSHIPMENT TERMINALS MANAGED BY UIRR MEMBER COMPANIES

	List of terminals under own management		Type of connection			Total turnover (departing + arriving)	Technical data			Nearest railway station (entry point to the rail network)	Located on which European Rail Freight Corridor(s)
	Name	City	UCT Rail	IWW	RoLa	in units	Total surface (m ²)	Cranes (gantry + mobile)	Number of tracks		
	Brennersee ROLA	Gries/Brenner			●	146,083	5,000	-	2	Brennersee	3
	CTE	Enns	●	●		216,500	175,000	3	9	Enns Hbf	3
	CTS	Salzburg	●			165,000	120,000	2	5	Salzburg Hbf	3
	Salzburg Hbf ROLA	Salzburg			●	4,488	5,000	-	2	Salzburg Hbf	
	St. Michael CCT	St. Michael	●			12,620	15,000	3	2	St. Michael	5
	Villach Süd CCT/ROLA	Villach	●		●	40,724	70,000	5	6	Villach Süd	5
	Wels Vbf CCT/ROLA	Wels	●		●	204,052	120,000	6	9	Wels Vbf	
	Wien Süd CCT	Vienna	●			133,504	250,000	2	4	Wien Zentralverschiebebfh	5
	Wolfurt CCT	Wolfurt	●			111,364	54,000	7	4	Wolfurt	
	Wörgl ROLA	Wörgl			●	159,368	40,000	-	3	Wörgl	3
	Athus Container Terminal	Athus	●			130,000	160,000	9	6	Aubange	2
	Cirkeldijk	Antwerp	●			34,431	52,000	3	4	Antwerp Berendrecht	1, 2, 8
	Combinant	Antwerp	●			138,000	99,000	4	5	Combinant (BASF)	1, 2, 8
	Euroterminal	Genk	●			26,584	80,000	3	4	Genk Goederen	1, 2, 8
	HTA	Antwerp	●			80,938	53,000	3	5	Antwerpen	1, 2
	Main Hub	Antwerp	●			90,219	202,497	6	8	Antwerp North	1, 2, 8
	Aarau	Aarau	●			48,939	27,000	3	5	Aarau	2
	Basel	Basel	●			36,932	17,000	3	2	Basel	2
	Z 4	Chiasso	●			7,333	7,000	1	1	Chiasso	1
	KTL	Ludwigshafen	●			362,906	305,000	8	13	Ludwigshafen-Oggersheim	1, 4
	TSG	Singen	●			71,896	63,000	3	4	Singen	1
	Avignon Courtine	Avignon	●			83,000	85,296	6	10	Avignon Champfleury	2, 3
	CEF	Mouguerre	●			32,500	35,000	4	4	Bayonne	4
	CLESUD	Miramas	●			48,000	490,000	4	2	Miramas	
	Cognac	Cognac	●			7,768	6,478	2	3		
	Gevrey	Dijon	●			9,206	15,000	2	4		
	Hourcade	Bordeaux	●			78,104	48,755	5	7		
	LDCT/DELTA3	Dourges	●	●		94,753	60,000	9	7	ITE Dourges	2, 4
	Le Boulou	Le Boulou	●			21,042	90,000	4	8	Le Boulou	6
	Marseille	Marseille	●			61,819	41,363	6	6		
	Mouguerre	Mouguerre	●			2,506	35,000	2	4	Bayonne	4
	Noisy	Noisy le Sec	●			20,500	70,000	4	10	Noisy le Sec	4
	Saint Jory	Toulouse	●			14,119	52,595	4	4		
	Valenton	Bonneuil sur Marne	●			86,032	132,000	5	7	Valenton	4
	Vénissieux	Lyon	●			110,419	46,100	9	4	Vénissieux	2, 6
	Rail Cargo Terminal-BILK Co.Ltd.	Budapest	●			106,352	223,000	7	7	Budapest	6, 7
	Sopron CT	Sopron	●			26,460	30,000	3	10	Sopron	11
	Candiolo	Candiolo	●			10,557	100,000	2	5	Candiolo	
	EMT	Trieste	●	●		64,469	80,000	4	4	Trieste Campo Marzio	5, 6
	Gallarate	Gallarate	●			32,891	100,000	2	3	Gallarate	1
	Giovinazzo Terminal	Giovinazzo	●			10,600	30,000	2	4	Giovinazzo	5
	Lugo Terminal	Lugo	●			13,650	190,000	3	8	Lugo	5
	Piacenza	Piacenza	●			106,586	55,000	5	3	Piacenza	5
	TBG	Busto/Gallarate	●			417,425	243,000	12	18	Gallarate	1
	HUB Terminal Poznan	Gądk	●			94,949	320,000	-	5	Gądk station	5, 8
	Katowice Wlosienica	Katowice	●			516	12,000	2	2	Dwory Monowice	5
	Terminal Dąbrowa Górnicza	Dąbrowa Górnicza	●			13,434	225,000	-	4	Dąbrowa Górnicza Towarowa	8
	Terminal Kontenerowy Pruszków	Pruszków	●			32,200	32,976	-	3	Pruszkow station	5, 8
	Wroclaw Siechnice	Wroclaw	●			4,636	15,000	2	2	Siechnice	5
	Railport Arad	Curtici	●			61,503	8,000	5	7	Curtici	6
	Daventry	Daventry	●			41,220	12,000	2	2	Rugby	2

UIRR s.c.r.l.

31, rue Montoyer - box 11 | B-1000 Brussels | Belgium

www.uirr.com | headoffice.brussels@uirr.com

Tel. : +32 (0)2 548 78 90 | Fax : +32 (0)2 512 63 93