INTERNATIONAL UNION OF COMBINED ROAD-RAIL TRANSPORT COMPANIES

UIRR Report

1996

IMPRESSUM

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FOREWORD

Transport policy is facing important changes. Only those companies which adapt to these changes and to the customers' requirements will be successful. The great strength of UIRR companies is their closeness to the market. Thousands of road hauliers and freight forwarders have set up combined road-rail companies and are committing themselves to developing them further. Structural changes require operators to be flexible. The UIRR proved this when, in 1995, despite many days of strike at more than one railway undertaking, it managed to increase traffic and to develop new sales markets intensively where traditional markets were stagnating.

Werner Külper (left), President of the UIRR, with Neil Kinnock, EU Transport Commissioner.

In October 1995, the UIRR celebrated its 25th anniversary. Its success is demonstrated not only in the geographical expansion from eight founding members to the present seventeen members in as many European countries, but mainly in the result: last year 6,500 long-distance lorry journeys per day were shifted onto rail, and over the last ten years, international transport has more than trebled.

The chances for further positive development are good as long as one basic rule is maintained: the concerted action of road-rail companies, the railways and transport policy-makers.
Transport policy currently sets framework conditions in three areas which will have a growing influence on the future of combined transport:

- competition between transport modes (Commission Green Paper on "Fair and Efficient Pricing")
- competition in the railway sector (Directive EEC 91/440")
- investment in infrastructure

With its Green Paper "Towards Fair and Efficient Pricing in Transport", the European Commission has made a first move towards shifting the external costs, i.e. the costs which are currently passed on to third parties, society or future generations, to those generating them. Improved efficiency will be obtained provided that transport users take account of the real costs when choosing a certain mode of transport. Every step towards costs being borne by the party generating them promotes fair competition between the different modes - this can only be beneficial for combined transport which depends on the co-operation between road and rail.

The aim of the Railway Directive EEC 91/440 is to bring competition into the railway business. The UIRR is hoping for a jump in productivity of rail transport which could create improved chances for combined transport. What matters now is to overcome national railway structures. Only when the management of the infrastructure is completely separated from the rail operators, will the existing railways be in a position to compete with each other on the "neighbouring network". Only then will the many private, and mostly regional, railway undertakings have the opportunity to opt freely to co-operate or compete with the larger railways. Initially, the "open access" Directive has made existing forms of co-operation more difficult. Some railways are now behaving towards the operators as if internal competition was already a reality. One should not fear to achieve results in partnership and collaboration merely because it might benefit a competitor. However, many railways have recognised that it is particularly in times of major changes that reliability in a partnership matters most. The competence of combined transport companies is now more in demand than ever.

The third instrument with which transport policy can set the course for the future of combined transport is capital expenditure on infrastructure. Thus, not only do the two Trans-European Networks (TEN) projects from Munich to Verona including the Brenner tunnel and the Betuwe line from Rotterdam to the Ruhr — which were specially identified for combined freight transport — create better conditions, but also the construction of new lines for high-speed passenger transport, which relieve the existing tracks in favour of freight transport. The construction of terminals is also a condition for shifting transport from road onto rail. Transport policy must not only demand combined transport, but also promote it. Infrastructure costs will therefore play a key role. With the separation of railway infrastructure and operation, it has become evident that unproductive areas, surplus staff etc. are being pushed more and more into the area remaining in public ownership. Already today the operating units of many railways are no longer able to offer operators prices in line with the market because they are charged with excessive track costs from their infrastructure units. The solution can only be to spread the fixed costs over the income from greater volumes of traffic and to achieve considerable rationalisation in the construction and maintenance of the infrastructure.

The transport market and its main players are on the move — and we welcome that. The task of the governments is to set a framework for enhanced but fair competition. Transport companies in combined transport must react flexibly to the changing conditions and, better still, act and set new standards.

SYSTEMS INTEGRATION
THE NEW ROLE OF THE RAILWAYS

RUDY COLLE

Director General of the UIRR, Brussells

For its recent world congress, the international road transport union IRU commissioned a survey(1) on transport matters. In this, a representative sample of almost 10,300 people from 13 European countries was asked about its perception of the comparative characteristics of goods transport by road and by rail. The result showed that a large majority attributes a greater flexibility to road transport as well as a certain advantage in terms of speed. Rail ranked clearly first, however, when it came to naming the least polluting, the safest and also the most economical form of transport.

Although the questions were formulated in a general way and even though the question of performance over distance did not feature in the survey, this verdict turns out to be highly relevant in practice.

For more than twenty-five years, the UIRR and its member companies have based their activities on the respective advantages of road and rail. They make every endeavour to prove, with increasing success, that there is a way of allowing the transport market to benefit from the characteristics of both these modes, by bringing them together through the various combined transport options available. In 1995, these road-rail combinations amounted to over 1.6 million journeys, representing approximately 3.7 million TEUs. However, these impressive figures do not yet translate into a substantial market share — a breakthrough — of combined transport.

Another part of the Swiss survey, which put questions to road hauliers, indicates that only 23% of them had, at one time or another, taken steps to participate in combined transport. Further sustained efforts are thus required to raise wider awareness amongst those holding by far the largest share of freight transport in Europe. We continue to work hard towards this goal, but our efforts would be all the more effective if national and international road hauliers' and freight forwarders' associations were to join us with firmer conviction and by doing so, would prove more conscious of their members' long-term interests.

The reluctance of road hauliers and forwarding agents to entrust part of their transport operations, for part of the total journey, to the rail mode, is due less to a feeling of losing the traffic, — let us bear in mind that they retain control over such transport —, than to reservations concerning security and efficiency of the service over the whole transport chain. The railways have to become more reliable. This will certainly happen when these undertakings will — as the operators do — function in a really competitive environment, which would lead them to devote all their efforts to providing traction services that would prove more punctual, free from interruptions on technical grounds or for reasons of different social regulations and generally more economical.

Competition has proved beneficial to the quality and the price of the product, in all those sectors of the industry where it has replaced comfortable monopoly or quasi-monopoly situations. Its implementation in the rail sector would not necessarily mean that we would change partners. The UIRR companies achieved their present combined transport figures, representing over 55% of all such transport in Europe, in co-operation with the so-called national railway companies. Such associations are not abolished by the first competitor that appears; but their continuation presupposes that these companies are or remain the best railway operators. Directive 91/440 has created the conditions enabling the national railway companies to become more efficient. The first stages of its implementation have not yet met the high expectations. On the contrary, some of these companies seemed more concerned with competing with the UIRR-members in the field of combined transport marketing, by supporting or forming subsidiaries, some of which having distinguished themselves more by their severe deficits than by their contribution to developing new traffic flows. Similarly, some new railway company associations have been announced, introducing non-European interests. Their declared improvement of rail services has still to be proven.

By strengthening their partnership ties, — like those prevailing between UIRR companies, — the European railways and our members can, with the help of their respective know-how, build a progressing and efficient combined transport, which would benefit the whole transport sector, particularly the road partners.

On every occasion, the UIRR continues to demonstrate its willingness to co-operate with the established railway companies. Provided these companies pursue convincing strategies against recent trends that may threaten their own operations, we believe a prosperous future together and a growing market share for combined transport lie ahead of us.

(1) MIS Trend s.a., CH - 1005 Lausanne

THE SHUTTLE SYSTEM

THEO ALLEMANN

Chief Executive of Hupac, Switzerland

In the beginning of the 1990ies, it seemed as if the period of unlimited growth of combined rail/road transport was over. On the one hand bottlenecks began to develop at terminals and transhipment centres and on the other hand the overall competitive situation was experiencing important changes. These new market conditions placed combined transport in an entirely different context, which led Hupac to rethink its approach to this transport technique, revise its structures, and develop alternative logistical concepts. The "Shuttle Train" concept was born.

In European combined transport, the expression "shuttle" is increasingly used in a very general way. The following conditions however, must be fulfilled for a Hupac combined transport train to qualify as a "Shuttle":

- The composition of the wagons is constant, and their number remains unchanged. The specifications and the loading possibilities offered must be compatible with the types of loading units used by HUPAC customers on the shuttle route concerned. The waggons in the composition will only be changed on technical grounds.
- The train schedule foresees a minimum of 5 round trips per week.
- The train shuttles always between the same two terminals.
- The train is not shunted neither on the way nor at the points of departure or arrival.
- Hupac purchases traction services from the railways, and thus assumes the full loading risk.
- A single and unique consignment note is issued for the entire train (instead of such a note per loading unit or per wagon).
- It is no longer necessary to label each waggon.

The distinctive feature of this solution is that transports is offered exactly at the point where demand occurs, i.e. between the major industrial centres. Hupac, whose corporate headquarters is located in Switzerland, is particularly familiar with the situation prevailing in the Alpine region, and that is why its services concentrate on transalpine long-distance transport.

With the introduction of shuttle trains in 1989, Hupac developed a system, that looks at operational problems on the one hand and commercial problems in combined rail-road transport on the other in a completely new way, and this has resulted in new solutions and innovative trends in the field of European combined transport. The market share of the shuttle trains has increased steadily ever since. Today, more than 80% of Hupac-shipments are provided with shuttle trains.

Because prices are stable over the long-term, schedules highy reliable, transport conditions safe (no shocks due to shunting) and capacity measurable, not only Hupac but especially its customers benefit from this progressive shuttle system. Thanks to the shuttle the railways themselves are able to reduce their costs drasticly, and for the first time the shippers can apply "just-in-time" concepts to rail. The UIRR companies appreciate the product because of its easy technical and operational handling, but also due to the transparent and longer-term scheduling of transport volumes. The general public also benefits from the service concerned, because it implies fewer risks of accidents with hazardous goods and their effect on soil, air and water and because it uses the energy and space resources in a rational manner.

In the meantime the shuttle train concept has been adopted by other combined transport operators. Nevertheless, Hupac was the first company in Europe to have conceptionally thought it through and developed and applied it in practice. Moreover, taking into consideration the technical innovations and the appropriate management and communication systems, the company has created a concept which is not only applicable on an international scale but also takes account of future transport requirements and which generates significant savings for the entire logistical chain. All the information concerning shipments and trains are processed daily at the transhipment yards by an IBM host computer, and where this is not done in real time, the information is transmitted to Hupac's central computer system via on-line links.Data are exchanged with the UIRR-partners and transmitted to the railway undertakings involved, in order to ensure that their operations also proceed from an error-free exchange of data. Thanks to the recording and the immediate transfer of all important transport data, Hupac can guarantee permanent, immediate and reliable monitoring of shipments.

Hupac submitted the "shuttle" concept for the 1996 European Transport Prize, and was honoured to see the concept selected by the jury last March in Düsseldorf.

The Swiss member company has succeeded in integrating modern and traditional combined transport techniques and in attaining higher traffic volumes. This concept not only fits into the official transport policy of the national governments, but certainly anticipates the future policy for Europe as a whole.

JAN H. VAN EXEL

Director of Trailstar, Rotterdam.

It is no risky assumption to state that for Trailstar maritime containers will show the biggest growth in intermodal rail transport in the coming years, despite the increasing advantages of continental traffic. With Rotterdam estimating they will handle six million boxes or more in 2005, twice the 1995 figure, there will be a lot of opportunities heading into the direction of combined transport. As many boxes as possible should be carried by international rail shuttles.

In 1995 the maritime share in Trailstar's volume rose from 3% to 6%. For the Dutch role as an important distribution centre to Europe this is vitally important in order to hold and strengthen its market share, especially in the more remote European regions, beyond the container trucking radius, or the Rhine basin. Accounting for 10,000 companies, about 400,000 directly employed and eight percent of Holland's GNP, the Dutch transport and distribution sector strongly depends on "open" channels in all directions.

Intermodal activities

The modal split — internationally — of maritime containers in Rotterdam roughly is: road 60%, inland shipping 25% and rail 15%. The consequences of the expected steep rise of volume, even with the modal split remaining unchanged, are easily guessed. In the ideal Dutch scenario all growth of container transport is to be absorbed by inland shipping and rail. This emphasises the enormous — and challenging — mission for the intermodal rail sector to extend the European rail shuttle network.

Congestion

From the Rotterdam rail container terminals at least 150 international shuttle trains are despatched each week. Most operators want their shuttles scheduled in prime time, creating congestion problems at the rail terminal although it is open day and night. Partly because congestion is looming-up around container shuttles as a result of their imbalance — albeit far less than with road transport — the largest terminal in Rotterdam ECT (Europe Combined Terminals) has come up with a solution. The project which set off in May, features a daily sailing by container barge to Duisburg, where the DeCeTe terminal provides link-up to the road system, but especially to the extensive rail network with some 70 connections to destinations all over Europe.

Plan 2000-Short

An even larger project is Plan 2000-Short which concentrates short sea container traffic in the port of Rotterdam at one location. Plan 2000-Short offers a united and dedicated complex enabling synergetic advantages and economies of scale. The co-operating parties are leading integrated short sea container lines, their stevedores and the Rotterdam Port Authority. Construction was started by European Transport Commissioner Neil Kinnock. In the final phase the project will comprise 60 hectares with an annual transhipment capacity for 700.000 boxes and with investments totalling Dfl. 200 million. The opportunity has emerged for the shipping lines to use each other's vessels without transferring containers within the port area. With this physical concentration Plan 2000-Short aims to make Rotterdam the junction of "thick" container flows between the Continent and the British Isles and flows to and from North and South Europe. The hub and spoke effects plus the oncarriage connections should enable short sea shipping to gradually attract more cargo, and thus produce the snowball effect allowing higher frequencies and speed. Focus is on road cargo suitable for containerisation, preferably in the best "wet" trailer alternative around: the 45-footer. The short sea operators are taking up competition with road hauliers by introducing the 45 foot container palletwide. Short sea, like rail, enjoys the rising political tide — as the European round table project shows. Plan 2000-Short placing Rotterdam at the exact cross-roads of north-south and east-west trades, obviously offers extra potential to container shuttles.

Impact of the Betuwe Line

As the starting-point and westernmost investment of the Betuwe Line a second rail terminal will be built at the Maasvlakte, where the current terminal already encounters congestion problems with the 150,000 rail containers handled per annum. At the current growth rate this will have doubled in three years, which furthermore emphasises the necessity for co-operation both between intermodal rail interests, and between continental and maritime groups. Together, we all must eliminate the phenomenon of two trains departing for the same destination within an hour, both utilised at half capacity only. This is in the interest of an optimum payload, but more importantly for the sake of a most efficient use of Europe's rail infrastructure.

SYSTEMS INTEGRATION
THE RECONSTRUCTION OF DESTROYED SYSTEMS

ROK SVETEK

Director of Adria Kombi, Ljubljana.

Peace in the Balkans provides haulage companies with new opportunities and challenges. The reconstruction of areas destroyed in the war in Bosnia-Herzegovina and Croatia began with support from the international community and in particular the European Union. The rail and road infrastructure in Bosnia-Herzegovina has been greatly affected. There are still political conflicts between the Federal Republic of Yugoslavia and Croatia which makes a normal flow of traffic between these countries impossible. This also applies to transit traffic to Bulgaria, Greece and Turkey.

The rail and road infrastructure should be renewed in as little time as possible and the political obstacles should be removed so that traffic can resume unhindered. In order to develop combined transport successfully it is also necessary to establish suitable terminals in Bosnia-Herzegovina.

The Slovenian combined transport company, Adria Kombi, the successor of the former Yugoslavian company YUKOMBI, has kept up contacts with the new Balkan States. Adria Kombi is currently running combined transport services in Slovenia and Croatia. However, it also covers the area of Bosnia-Herzegovina by serving Tuzla, Sarajevo and Mostar by lorry trailers and containers from the Croatian terminals of Slavonski Brod and Split. There is great interest in resuming rail traffic on the Ljubljana - Zagreb - Belgrade - Niš - Skopje - Thessaloniki/Niš - Sofia - Istanbul line. As soon as the political framework conditions have improved, rail transport will begin operating. The infrastructure has been repaired ready for an immediate start. The terminals in Belgrade and Skopje are equipped for all types of combined transport and at Adria Kombi we are preparing for the opening of this major rail connection. The terminal in Ljubljana is increasingly becoming the transhipment centre for connections between the Federal Republic of Yugoslavia, Macedonia (FYROM), Croatia, Bosnia-Herzegovina and between Slovenia and the European Union.

Rail transport and combined transport now have an advantage over pure road transport since new frontiers have come into being with waiting periods for lorries of currently 8-10 hours at border posts. These modes of transport are thus quicker and consequently more competitive.

The Slovenian and Croatian railway companies have convenient timetables from Ljubljana to Villach, to the ports of Koper and Rijeka and to other terminals in Slovenia and Croatia. The railway administrations in Yugoslavia and Macedonia are improving and also co-ordinating their timetables. In Croatia, preparations are under way for the intended founding of a national company for combined transport by the end of 1996. There are similar plans in the Federal Republic of Yugoslavia. Adria Kombi is firmly supporting these efforts with the aim of gaining new and powerful partners who are able to develop combined transport in these countries successfully.

Preparations for entry to the EU are well under way. Now that Slovenia filed its application for accession, the transport sector is now undergoing far-reaching restructuring. The main problem is the lack of investment funds available, which are not sufficient for all projects but which, for the moment, are mainly being concentrated on the rail and road sector. From a technological and commercial point of view, this is a great advantage for combined transport. Particularly noteworthy is the fact that the necessary loading gauge is available on all the main lines.

In order to promote combined transport, the Slovenian government has already modified some major regulations to bring them in line with those of the EU, in particular permitting a greater total weight and lifting the travel ban on Sundays and public holidays in road traffic. Furthermore, the Slovenian railway company has received subsidies for transport services carried out in combined transport.

In contrast, a great increase in lorry traffic is appearing and to complicate matters, a large number of lorries from Eastern Europe do not meet Western European environmental standards. In order to avoid this pollution and to cope with the increase in traffic in as environmentally friendly ways as possible, Adria Kombi, together with Hungarokombi, is organising the Szeged - Ljubljana rolling motorway which is being extended to Sežana until the end of the year. Ecological problems are also troubling Croatia where Adria Kombi, in co-operation with Ökombi and the Croatian railways, is looking into the possibility of introducing a rolling motorway from Slavonski Brod to Wels and Sežana.

Despite their ambition, the operators know that they cannot solve the huge problem of organising transport in the areas damaged by war all by themselves. They need the assistance of the various railways, the active support of transport policy, the international financial institutions and the EU. Financial backing has already been made available as part of the Phare and PACT programmes of the EU-Commission. These examples should be followed by others.

COMPANY REPORTS

ADRIA KOMBI, (Ljubljana). Since the signing of the peace agreement, this member company has focused most of its activities on non-accompanied transport in the Balkan States and more particularly on Croatia, Bosnia and Serbia. Container traffic from the port of Koper to Austria, the Czech and Slovak Republic and Hungary is also developing well. If the increase in transport volume allows, Adria Kombi plans to set up direct train services. In addition, a considerable growth has been noted on the rolling motorway Ljubljana-Szeged, which will improve even further once the new terminal in Sežana near the Italian border is opened.

BOHEMIAKOMBI, (Prague) has been a member of the UIRR since the beginning of 1996. The rolling motorway service between Lovosice and Dresden that opened in autumn 1995 has been reinforced. This link, that replaces transport by motorway, has to be maintained at least until the opening of the motorway between Prague and Dresden and represents an enormous growth potential for the company. Currently twelve trains run on this route and two trains per day use the Budweis-Villach rolling motorway. Bohemiakombi has also achieved significant growth rates in the non-accompanied transport of containers between the ports of Northern Germany and the Czech Republic.

CEMAT, (Milan) once again experienced impressive growth in 1995. Among last year's innovations is transport under satellite-controlled temperature and the opening of a multimodal corridor for the transport of hazardous goods to Greece. The possibilities for expansion that Eastern Europe offers — especially

Poland, Russia and Belorus — are planned to be exploited more fully. This includes the pilot project for a direct link between Padua and Moscow and a direct train running 4 times a week on the Verona-Rostock-Scandinavia line. Refrigerated swap-bodies, special wagons for transport via the Channel Tunnel, new transhipment equipment and on-line information are part of the extended range of services offered by the company.

COMBIBERIA, (Madrid). The opening of the Channel Tunnel has resulted in a shift in traffic to the south of France. Combiberia has set the objective of acquiring new customers in order to open up the Iberian Peninsula to combined transport. A notable increase in traffic with Portugal and the connection between Portugal and the Spain-Germany link via Barcelona reinforce the "Iberian" character of the company. The increase in the number of Spanish customers — who were initially reticent to the idea of combined transport — is a welcome development.

CTL, (London) has since June 1994 confirmed its position as the leader on the British market for combined transport to the Continent in close co-operation with Novatrans and CEMAT. Since mid-1996, 44 UIRR trains per week have been running on the routes between England and Italy, Spain and France. The transport activities via the Tunnel are currently concentrated on 5 terminals in Great Britain (London, Birmingham, Manchester, Liverpool and Glasgow). Others are planned for the near future. CTL has installed ultra-modern software which provides a means of localising the trains and rapidly informing customers. In addition to transport via the Channel Tunnel, CTL offers links with the ports of Zeebrugge and Le Havre.

HUNGAROKOMBI, (Budapest) doubled its number of consignments compared with the previous year. The rolling motorway holds a key position in transport through Hungary. The number of trains on the Sopron-Wels route has increased to five a day. The links between Budapest and Wels and between Szeged (in the south-east of Hungary) and Ljubljana have been added recently. The latter allows Romanian customers to transport their goods daily to Italy without authorisation. Thanks to a PACT-UIRR project, the company has been able to develop its computer system and is currently setting up a telecommunications system with companies from neighbouring countries.

HUPAC, (Chiasso) was one of the first European operators to obtain in June 1995 the much-acclaimed ISO 9002 quality certificate. The internal Quality Management System, which already existed, and the shuttle train system are two factors which have provided a means of obtaining this certification. In addition, in 1995, the company enjoyed a 10% growth rate in non-accompanied combined transport. Thanks to the continuous extension of the network and the ambitious application of the concept of shuttle trains, 80% of its transport is assured by this type of train.

KOMBIVERKEHR, (Frankfurt) achieved a 3% increase during 1995 which is satisfactory considering the high figures from the previous year. Thanks to the increase in the number of direct trains, transport has expanded on the numerous international routes and has, for example, doubled on the route to Spain. The transport of containers from sea ports in the north of Germany to the Czech Republic and Hungary has seen growth in double figures. The development of transport by boat is impressive despite a set back in the political framework conditions following Austria's joining of the Union. As regards Alpine transport, Kombiverkehr has achieved an 8% increase.

NOVATRANS, (Paris) could have achieved a sensational result in 1995 if the SNCF had not gone on strike for four weeks. Prior to the strike, the growth of traffic was around 15% in international transport and 10% in national transport. Novatrans has equipped its terminals in Lille and Le Havre with new transhipment equipment. Thanks to the Minitel system, Novatrans can provide its customers with information on the status of certain trains on French tracks. In the event of a delay, unproductive waiting time for those called upon to assure a terminal route can thus be avoided. Novatrans anticipates a considerable increase in traffic following the opening of new routes, the expansion of main terminals and the addition of new timetable slots.

ÖKOMBI, (Vienna) achieved a 5.5% growth rate during this first difficult year of Austria's membership of the EU. Especially in the field of rolling motorways, Community taxation on turnover applied to cross-border combined transport and the reduction of taxes on road transit have had their impact. Although the consequences of liberalisation constitute a strategic turning point for the Austrian transport sector, Ökombi aims to achieve again in 1996 double-figure growth rates thanks to the effects of the Ecopoint system, the creation of new links from and to Eastern Europe and a policy of direct trains in line with the market.

POLKOMBI, (Warsaw) hopes to further develop its transport service in 1996 and is expecting an 80% increase on the main links with Germany and Italy. Under the condition that political framework for the development of combined transport will improve Polkombi would like to start traffic from the Netherlands, Germany and Italy to Russia via Poland. In the operational field, Polkombi is in the process of developing its internal computer network.

SKANKOMBI, (Padborg) benefited from expansion due to an upturn during the first half of 1995 which, however, weakened during the second half of the year. In co-operation with its UIRR partners, Skan Kombi developed an innovative concept for combined rail/road transport in Scandinavia. After the opening in mid-1997 of the fixed link of the Great Belt and of the bridge over the Öresund in the year 2000, the quality/ price ratio will be the decisive factor, from the customer's point of view, in the choice of transport routes between Scandinavia and the Continent.

TRAILSTAR, (Rotterdam) can be proud of a 30% increase in the field of swap-bodies, while maritime containers have been the driving force behind the growth and represent, in effect, the total transport volume of the "Austria Shuttle". Trailstar has made significant improvements to its extended range of products, including the "Holland-Verona Shuttle". The number of shuttle trains to Novara increased from 6 to 12 per week. Traffic towards Eastern Europe and to Scandinavia will also continue to grow. For Trailstar's future development very interesting, a new terminal in Born (Limburg), with an initial capacity of TEU 20.000 has been opened in September 1996.

T.R.W., (Brussels) ended 1995 with a total transport volume lower than that of last year. The reason for this was increased competition in the wake of the opening of the Channel Tunnel and the strike of the SNCF in the last quarter. Traffic on all other T.R.W. services has increased by 5,3%. The opening of the Genk terminal in 1995 met all expectations and attracted German and Dutch customers in addition to the Belgian clients. The concept of Shuttle trains was launched successfully, with Brussels and Turin as Gateways for traffic to Italy. Also, various improvements have been made in services to Spain, Germany and Austria.

A QUARTER OF A CENTURY

On October 23, 1995 the UIRR celebrated its 25th anniversary. It was founded in 1970 at the Munich Transport Fair by 5 combined transport companies of the EEC that existed at the time (Ferpac-Italy, Kombiverkehr-Germany, Novatrans-France, T.R.W.-Belgium and Trailstar-Netherlands) and by 3 companies in the EFTA countries (Hucketrans-Austria, Hupac-Switzerland, ASG-Sweden). Three of these companies have since been replaced by another (Ferpac by Cemat, Hucketrans by Ökombi and ASB by Skan Kombi) and 9 other companies have joined since then.

T.R.W. 30TH ANNIVERSARY

The Belgian member company of the UIRR was founded on 23 February 1965 in Brussels at the initiative of Belgian road hauliers and national road associations. Despite the fact that the company is relatively medium-sized, it has succeeded in constantly increasing its transport volumes.

1996 EUROPEAN TRANSPORT PRIZE

The ”1996 European transport prize” was awarded to Hupac in March 1996 on the occasion of the ”Eurocargo” Fair held in Dusseldorf. The company proved that its forward-looking shuttle train concept is perfectly applicable at an international level and that it is possible to develop a more rational and more economic transport chain. All partners, such as the railway companies and the UIRR members Kombiverkehr and Cemat, have contributed to make the Shuttle product a system which meets the requirements of a modern transport market.

AUTUMN ASSEMBLY IN MADRID

At the initiative of Combiberia, this year’s autumn Assembly and the Annual UIRR-Congress will take place in Madrid on September 19-20. The theme of this Congress is: ”The Iberian Peninsula and Combined Transport - Cruising Speed in Sight?”. The UIRR regards the Iberian peninsula as a very promising market and the occasion of this Congress will be seized to openly discuss its strategy in view of developing combined transport in this geographical area.

PERSONALIA

Since December 1995, Grzegorz Kaczanowski is the new Chairman of Polkombi. As Managing Director of ”Polish Forwarding-Spedpol”, one of the founding members of Polkombi, he has been a member of the Board of Directors of the latter since its creation.

FRAMEWORK CONDITIONS OF COMBINED TRANSPORT

Within the framework of the PACT programme of the European Commission, and in co-operation with the ”Studiengesellschaft für den Kombinierten Verkehr” (SGKV) Frankfurt, the UIRR has carried out a study on the framework conditions of combined transport in Europe. This comparative analysis provides information which encourages the creation of an environment favouring the development of combined transport.

”FOCUS ON COMBINED TRANSPORT”

Better public information is one of the means by which the UIRR seeks to create greater interest in the field of combined transport. The brochure under reference which has this purpose, has been published thanks to partial funding through the Commission’s PACT programme. Originally produced in English, German and French, it has also recently been translated into Swedish, Hungarian, Czech, Polish and Slovenian. It can be obtained free of charge from UIRR member companies or from the head office in Brussels.

UIC STUDY: EXTERNAL EFFECTS OF TRANSPORT

This study, carried out at the request of the UIC by IWW (Karlsruhe) and INFRAS (Zurich), describes in detail the criteria for the internalization of external costs, such as air pollution, noise, transport accidents and congestion, and recommends the application of a combination of several policy instruments. It provides a useful synopsis of the knowledge acquired in these fields and constitutes a reference work in the debate on the allocation of the external costs of transport to those who generate them, which is a principle on which the Green Paper of the Commission is also based. This study can be obtained in German, English or French from the UIC at the price of 300 FRF.

OTHER ACTIVITIES

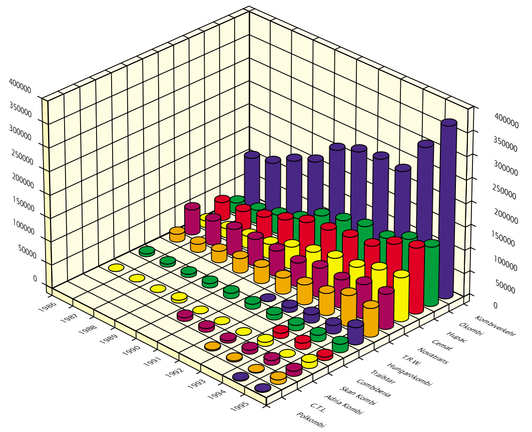
In close co-operation with its member companies, the UIRR office in Brussels is working to attract new Combined Transport companies from both inside and outside the EU. Potential candidates are informed of the general conditions, the advantages of joining the UIRR, etc. One can therefore expect to see an enlargement of the number of associates.

TRENDS

INTERNATIONAL TRAFFIC

UIRR's overall traffic rose in 1995 thanks to the growth of its international business. A total of 970.000 consignments were handled in this sector of activity, representing an increase of 14% over 1994. The strike of the French Railways SNCF in November and December affected the growth in transport volume of several member companies. Under normal circumstances they would have reached sensational numbers. UIRR's traffic with Eastern Europe developed well as a result of substantial efforts in recent years to create new services. The first full year of the Channel Tunnel operations similarly produced positive results.

Company *	Consignments 1995 **	+/- in %
Kombiverkehr	368.808	22 %
Hupac	141.977	11 %
Ökombi	128.116	5 %
Cemat	94.671	7 %
Novatrans	75.584	3 %
T.R.W.	61.733	-7 %
Hungarokombi	37.205	102 %
Trailstar	18.298	31 %
Skan Kombi	13.142	8 %
Adria Kombi	11.126	10 %
C.T.L.***	9.539	487 %
Combiberia	7.371	-47 %
Polkombi	1.340	-3 %
Total	**968.910**	**+14 %**



NATIONAL TRAFFIC

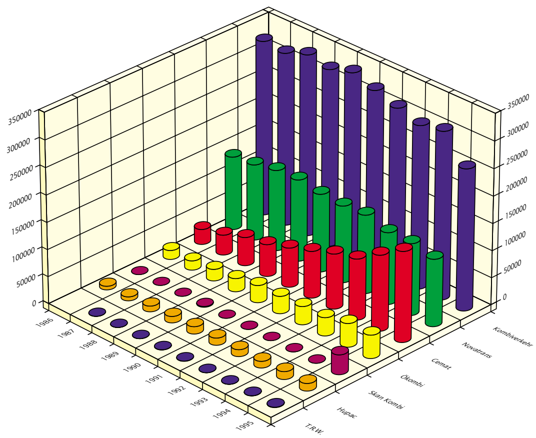
Last year's notable growth in traffic could not be maintained in 1995. Also here the strike in France left its marks. In Germany, an unjustified increase in rail pricing led to a substantial shift back to road transport. As in previous years, combined transport grew considerably in Italy because of its attractive services. Italy is now number one in Europe in terms of actual tonne-kilometres due to the relatively longer inner-Italian distances.

Company *	Consignments 1995 **	+/- in %
Kombiverkehr	261.000	-15,7 %
Cemat	167.000	19,3 %
Novatrans	124.329	-6,4 %
Ökombi	43.073	-1,6 %
Skan Kombi	36.418	0,1 %
Hupac	13.954	-3,6 %
T.R.W.	680	118,5 %
Total	**646.454**	**-4,6 %**

* In order to avoid double counting, these statistics only include the export consignments of the UIRR companies.

** Inthe UIRR statistics, a consignment is the equivalent of an average road transport (= +/- 2,3 TEU).

*** Since the beginning of 1994, only Channel Tunnel traffic has been taken into account.

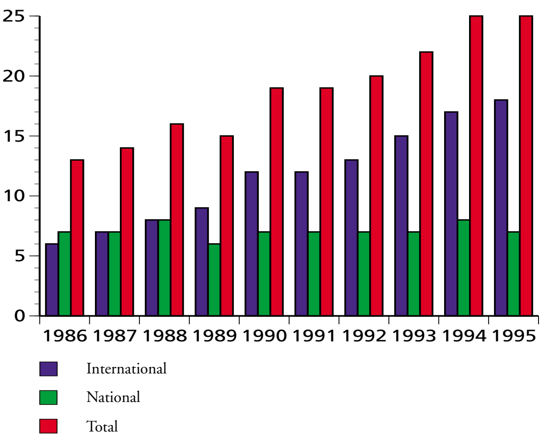


TOTAL TRAFFIC

The accomplishment of the European internal market is also reflected in the development of UIRR traffic in which international services account for 60% of the total volume. The average distance in national traffic rose to about 700 km as a consequence of the development in Italy. In the international sector, the heavily used rolling motorways led to an equal average distance.

NATIONAL (NAT.) AND INTERNATIONAL (INT.) TRAFFIC IN MRD. TKM.

Year	Int.	Nat.	Total
1986	6	7	13
1987	7	7	14
1988	8	8	16
1989	9	6	15
1990	12	7	19
1991	12	7	19
1992	13	7	20
1993	15	7	22
1994	17	8	25
1995	18	7	25

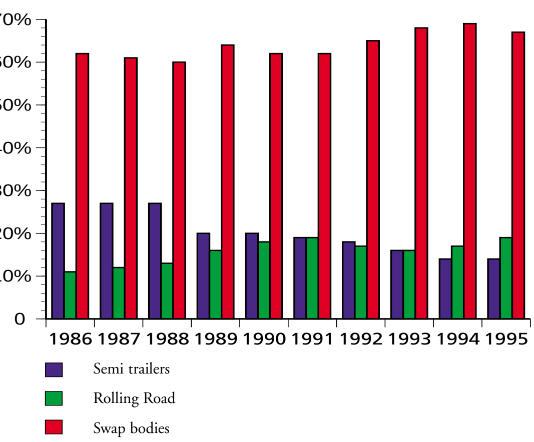


TECHNIQUES

Last year the break-down of consignments per technique shifted slightly: the share of swap bodies dropped by 2% to 67% of all consignments, transport by semi-trailers accounted further for 14%, while the rolling motorway increased its share to reach 19% of total consignments. The long-term trend towards the swap body remains unbroken. But high growth rates on the rolling motorway have resulted in a rise of the relative share of this technique in percentage to the consignments. In tonne-kilometres this effect is less pronounced.

PROPORTION OF PIGGYBACK SYSTEMS AS A PERCENTAGE OF TOTAL TRAFFIC

Year	Semi trailers	Rolling Road	Swap bodies
1986	27%	11%	62%
1987	27%	12%	61%
1988	27%	13%	60%
1989	20%	16%	64%
1990	20%	18%	62%
1991	19%	19%	62%
1992	18%	17%	65%
1993	16%	16%	68%
1994	14%	17%	69%
1995	14%	19%	67%



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SCANDINAVIA	SKAN KOMBI Thorsvej 8 DK - 6330 Padborg	Tel: (+ 45) 74.67.41.81 Fax: (+ 45) 74.67.08.98 Tlx : 526.70
NETHERLANDS	TRAILSTAR Albert Plesmanweg, 151 NL - 3088 GC Rotterdam	Tel: (+ 31) 10 / 495.25.22 Fax: (+ 31) 10 / 428.05.98
BELGIUM	T.R.W. Avenue du Port, 100 / bte 1 B - 1000 Bruxelles	Tel: (+ 32) 2 / 421.12.10 Fax: (+ 32) 2 / 425.59.59