



Challenging macro-conditions

While the actors of European Combined Transport are busy improving their competitiveness, enhancing their internal functioning and processes, the sector is confronted with multiple external challenges. The price of oil has dropped to levels last seen in 2005 - except for a brief period during the economic crisis in 2009. The dynamic increase of renewable electricity generation that occurred in the meanwhile, acted to loosen the correlation between the price of (traction) electricity and diesel fuel. Therefore, while truck fuel has declined, electricity costs did not change, causing a significant cost-disadvantage to rail freight operations. Moreover, whereas track access charges have continued their steady increases in most EU Member States, the introduction of distance-based road tolls is severely delayed in several Member States, while for instance Germany - already using usage-based tolling for HGVs - has outright reduced applicable toll rates. Long-distance trucking, the closest challenger of Combined Transport in the land freight transport market, is enjoying such external advantages which CT Operators are not capitalised to compensate for. Subsequently, in spite of modest economic growth returning to Europe, the UIRR CT Sentiment Index reflecting on the 12-month business outlook for European CT remains 'neutral'.

The REFIT Procedure concerning the Combined Transport Directive (92/106) is also nearing completion. UIRR expects communication of the report from DG MOVE within a few weeks. The determination on what conclusions should be drawn from the report will then be up to the newly appointed Director General of DG MOVE, Mr Henrik Hololei. UIRR has been advocating the transformation of the Directive to give the EU CT sector the harmonised regulatory framework that it needs to further enhance its efficient functioning.

Progress may be reported on a number of technical issues affecting CT such as the penetration of ILU-Code compliance by owners of loading units, as indications suggest that only as few as 5% of units do not feature a BIC- or an ILU-Code in Europe today. Full compliance would enable the use of these standardised identifiers to optimise the administrative and tracking and tracing processes. Development of the Last Mile Portal - with the launching of the railfreightlocations.eu website - is also pledging easier access of shippers to essential information needed to use rail freight. Finally, the risk assessment of load securing standards on road and Combined Transport (rail) is also progressing with a promise that harmonisation will be achievable this year.

UIRR has been dynamically developing as the European industry association of Combined Transport. I am proud to announce that with the accession of Ambrogio Trasporti, T3M and Terminal Service Austria the association's membership has doubled since 2014. This trust motivates UIRR in its efforts to promote, enhance and support Combined Transport in Europe.

Ralf-Charley Schultze - President



Ceremonial Opening of the Gotthard Base Tunnel

Switzerland, 1 June 2016

<http://www.gottardo2016.ch/en>



TEN-T Days 2016

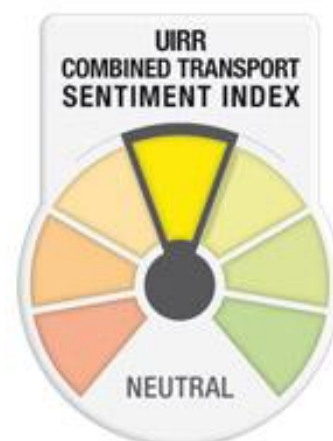
Rotterdam, 20-22 June 2016

WHERE? - VAN NELLE FACTORY
<http://www.vannellefabriek.com/en-us/>

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**Business outlook for
the 12 months between
1 January 2016 - 31 December 2016**



The European Commission Work Plan for 2016

27 October 2015



Commission President Jean-Claude Juncker and First Vice President, Frans Timmermans

"No time for business as usual" - is the title which the European Commission Work Programme 2016 (http://ec.europa.eu/atwork/pdf/cwp_2016_en.pdf) bears.

A confirmation of the structured approach to carrying out its mission, which President Juncker pledged upon being elected as President of the European Commission, this annual work plan sets out what the European Union should accomplish over the course of 2016. Over the year, 23 key initiatives are proposed to deliver on the Commission's 10 political priorities, while 20 withdrawals will be suggested and 40 REFIT procedures launched.

Unfortunately, just as none of the 10 priorities of the Juncker Commission (https://ec.europa.eu/priorities/index_en) directly refers to transport, so does one suffer if wishing to search for actions related to transport in the 2016 Commission Work Plan (https://ec.europa.eu/priorities/work-programme-2016_en).

- The much anticipated "Road Package" - containing the overdue revision of the Eurovignette Directive, the vehicle for implementing the user-pays and polluter-pays principles in the road sector - is uncertain to be unveiled in 2016.
- The Energy Taxation Reform proposal, inherited from the previous Barroso Commission and withdrawn immediately upon the Juncker Commission's accession to power in 2015, will also not be renewed - whereas this should be the ideal form to introduce the polluter-pays principle.
- The withdrawal of the proposal on changing the rail statistics regulation - presently under the legislative approval process - is threatened in case the European Parliament and the European Council fail to agree on it by 30 June 2016.

UIRR regrets to observe that 2016 will be the second year in a row when the Juncker Commission will not do anything to progress the regulatory framework of Combined Transport - implementing the measures contained in UIRR's paper: CT's EU Transport Policy Expectations (<http://www.uirr.com/en/media-centre/press-releases-and-position-papers/2014/mediacentre/663-combined-transports-eu-transport-policy-expectations.html>).

The European Council Presidency

December 2015



The leadership of Luxembourg's Transport Minister François Bausch was indispensable to reach a consensus in the Transport Council on the Political Pillar of the Fourth Railway Package. Progress was also made on the evaluation of the 2011 Transport White Paper.

The Luxembourg Presidency found solutions acceptable for EU Member States on both the issue of governance of state-owned incumbent railway monopolies and concerning public service obligations in domestic passenger rail transport, therefore the closing of the first reading of the Fourth Railway Package's Political Pillar became possible.

Considerable progress was achieved in the dialogue concerning the Technical Pillar of the same Package, which means that the baton was handed over to the Netherlands' Presidency with the realistic aim to close this major piece of rail legislation.



Infrastructure and Environment Minister of The Netherlands, Melanie Schultz van Haagen-Maas Gesternaus has taken over chairing the Transport Council of the European Union as of 1 January 2016. The Netherlands scored highest in the European Union's Transport Scoreboard

(http://ec.europa.eu/transport/facts-fundings/scoreboard/index_en.htm), which considerably raised the expectations that the material contribution of the current Presidency trio of Luxembourg-Netherlands-Slovakia will continue. The Dutch Presidency Programme on transport (<http://www.consilium.europa.eu/en/council-eu/pdf/2016-netherlands-presidency-workprogramme-en.pdf>) in this light was found to be rather modest: they pledge to deliver the Fourth Railway Package (final vote in June) and the ongoing Ports Package. A political declaration will be unveiled on Rail Freight Corridors and the transport-related details of the digitalisation agenda will also be discussed.

The outlook for Combined Transport in 2016

December 2015

Road-Rail Combined Transport is in prominent position to materially contribute towards reaching the decarbonisation aims of the European Union - agreed at the recent UN COP21 Climate Conference in Paris. Combined Transport provides the most efficient and economic solution to insert electric rail into longer distance transport chains. Electrically powered freight trains offer the lowest carbon means to facilitate the transport of cargo over long distances.

Transportation has been the only sector of the EU economy not able to reduce its overall carbon footprint during the past decade. In spite of the economic slowdown and the efficiency improvements of new internal combustion engines, heavy goods vehicles continue to emit ever increasing quantities of greenhouse gases into the atmosphere. Moreover, the share of road haulage in the European land freight transport market is significantly higher than in other developed regions of the world. Subsequently, everything should be set for Combined transport to face a bright future promising robust growth - much alike that experienced by the sector during the decades leading up to 2009. Unfortunately, this is not the case.

A mixture of regulatory inadequacies, transport policy paralysis, underperformance of the railway sector and macroeconomic developments is preventing the progress of Combined Transport anticipated by many.

Regulatory inadequacies

Financing of the operation, maintenance and development of the road network, signalisation and traffic management, technical rescue, enforcement, the consequences of climate change induced weather extremities, the public health and other social costs related to road transport is to a large extent borne by public budgets completely unrelated to road haulage. Moreover, these costs are not reflected in the prices quoted by road hauliers - making them appear lower in the eye of the shippers, who make the choice of mode of transport.

It is worth to note that costs of infrastructure are contained in the prices of other land transport modes to a greater extent.

Outstanding European law is overly permissive; it allows EU Member States to choose the degree of cost-sharing between road users and society at large, vehicle operators and public budgets. It leaves too much room for interested parties to advocate for whatever advantage is to be had from Member State to Member State, from government to government.

The European Union must close these gaps and loopholes and place the issue of transport infrastructure charging onto an equal footing throughout Europe. A clear financing model must also be prescribed to underwrite the consequences of climate change, oil dependency and other public health consequences of transport, which could be easiest achieved through the long overdue reform of energy taxation.

A lot is being done towards harmonising national rules that govern railways and cause inefficiencies in European rail transport, most of it under the Fourth Railway package, which is about to be finally adopted this year. Nevertheless, significant gaps will continue to persist between Member States even after this piece of legislation is enacted and implemented: unpredictable changes in track access charge levels, as well as the disharmony in charging categories will continue to weigh on competitiveness. The absence of quality guarantees with regards to the service to be expected in return for the substantial track access charge payments of rail infrastructure users remains a major concern.

Heterogeneity of rules that describe the operating framework of Combined Transport throughout the European Union should also have long been eliminated. The chance to do so presents itself through the upcoming and long overdue comprehensive revision of Directive 92/106.

Underperformance of the railway sector

While passenger railway services seem to upgrade, the quality performance of the European railway sector, when it comes to freight, leaves much room for improvement. After decades of UIRR's quality data collection, one might easily conclude that the status of rail freight on the priority list of the railway sector is to be held at fault. Unless there is change in this mentality, rail freight will not be able to fulfil its mission to host a meaningful quantity of shipments that are to be shifted from road haulage. Member States with direct influence over the incumbent railway undertakings performing the vast portion of rail passenger services hold the power of initiative on this issue.

Policy-making paralysis

Short-term versus longer perspectives is the forever dilemma of democratic politics, which lives and operates in 4-year (or shorter) cycles from one election to the next - aiming to please as many as possible. Only this can be the explanation why Member States of the European Union do not make the choices allowed (but not required) by European law that would take the land freight transport market's regulatory framework closer to fairness and mode-neutrality. There seem to be too many convenient explanations why should the otherwise climate and living condition-destroying road sector be continued to be favoured, prioritised by policymakers against any and all rational arguments.

Macroeconomic circumstances

The collapse of the oil price that began during the last months of 2014, and the promise of cheap oil projected to last for at least two more years (until 2018) uniquely favours the road sector, which is near completely dependent on oil derived fuels. Electric rail uses a much more diverse and sustainable range of sources of energy, with non-emitting renewables (hydro, solar, wind) taking an ever more prominent role. Awkwardly, politics refuses to intervene with such market-conform measures as energy taxation reform.

Zukunft Bahn 2020 - DB's Strategic Plan

December 2015

https://www.deutschebahn.com/file/de/9801892/wkg4frdYuMIVzZSKCeJymCkfMMM/10539454/data/Zukunft_Bahn.pdf



Deutsche Bahn, the largest European railway holding spelled out its strategy for the coming years titled: Zukunft Bahn (Future Rail). DB declared ambitious targets for itself alongside the intention to place the customer into the centre of its focus:

Erfüllung Kundenversprechen DB Schenker Rail > 95%

Quality, punctuality, reliability, provision of information and customer satisfaction are at the core of the solution.

As the first indispensable step, DB Schenker Rail came clean with openly admitting to a "67% punctuality (+/- 30 minutes)" of CT trains. [UIRR's own quality data collection reflects this assessment.]

Ultimately, the company's declared aim is to "meet the customer pledge (mainly with regards to punctuality) in 95% of the instances". UIRR and its members firmly support DB Schenker Rail in aiming to reach this performance level needed to compete successfully with long(er) distance road hauliers.

Opening of the Longest European Rail Freight Corridor

10 November 2015

www.rfc-scan-med.eu



Scan-Med, or Rail Freight Corridor 3, provides a continuous connection for freight trains from Stockholm through Denmark, Germany and Austria to Palermo, all the way south to Sicily.



5 countries and their rail infrastructure managers must collaborate to make this Corridor functional to become a feasible alternative to road.

The crown jewels of the Scan-Med Corridor infrastructure will be the Fehmarn Belt fixed road-rail link between Denmark and Germany, and the Brenner Base Tunnel, which should enhance the capacities and efficiency of the Trans-Alpine connection between Germany and Italy in Western Austria. These two strategic infrastructure components will come on line in 2024 and 2026 respectively.

When completed with these structures, the Scan-Med Corridor will offer a formidably efficient route providing a full P400 profile gauge, allowing 750m long trains driven by a single locomotive along its entire extent. The Corridor Management Entity will have 10 years to reach a level of efficiency needed to competitively manage this important infrastructure link.

Switzerland to Vote on Second Gotthard Road Tunnel

December 2015



On 28 February Switzerland will hold a referendum with potential major implications for north-south goods transport in Europe. The vote itself will be about the construction of a second road tunnel through the Gotthard, between Göschenen and Airolo, in order to allow for the old tunnel to be closed for maintenance.

Once the maintenance is completed however, the new road tunnel will effectively mean the doubling of road transit capacity. This could undermine the economics of the Gotthard Base Tunnel, a double track tunnel for trains along the same route, which will be officially inaugurated on 1 June this year.

Actual Weight of Intermodal Consignments

21 December 2015



The need to verify the gross mass of containers is required in the recent amendment of SOLAS, the Safety of Life at Sea Convention, by IMO. Essentially the change is little more than the already existing responsibility of shippers to declare gross mass accurately.

From 1 July 2016 the shipper must obtain the verified gross mass (VGM) of the container to be loaded onto a ship.

Container terminals may be drawn into the implementation of the new regulation as recipients of the information, which essentially means they have joint responsibility to prevent the loading of a container on a ship if its VGM is not available. It is unclear whether container terminals will be required to possess the capability to actually weight containers, as the terminal operator is not required to confirm the shipper's VGM.

Quality Performance of the EU Freight Railway Sector

December 2015

The quality (punctuality) performance of the European rail freight sector has not shown the marked improvement that the market has been anticipating for many years now.

More than one-and-a-half decade of UIRR quality statistics collection shows inconsistent results: whereas some isolated networks (United Kingdom, Sweden-Norway) - both linked to the continent's network through a pair of tracks only - shows a competitive quality performance of over 90% freight train punctuality, much of the continent continues to suffer from poor delivery.

Combined Transport is dependent on the overall performance of the European railway sector, infrastructure managers and traction service providing railway undertakings equally, to deliver on its promise to the shippers and consignors.

Understanding this dependence, UIRR, the industry association has taken multiple measures to assist in achieving progress:

- Update of quality monitoring done through UIRR statistics programme;
- INTERUNIT Project with railways to define modelling mechanism to define discrepancies needed to be bridged to achieve 90% punctuality aim;
- Collaboration with COM RU Dialogue platform to define KPIs to increase the transparency of the European Railway System's actual performance.

A consistent quality performance of the EU railway sector is indispensable to deliver on the modal shift in long(er) distance transport, needed to slow global warming.

ILU-Code Developments

December 2015

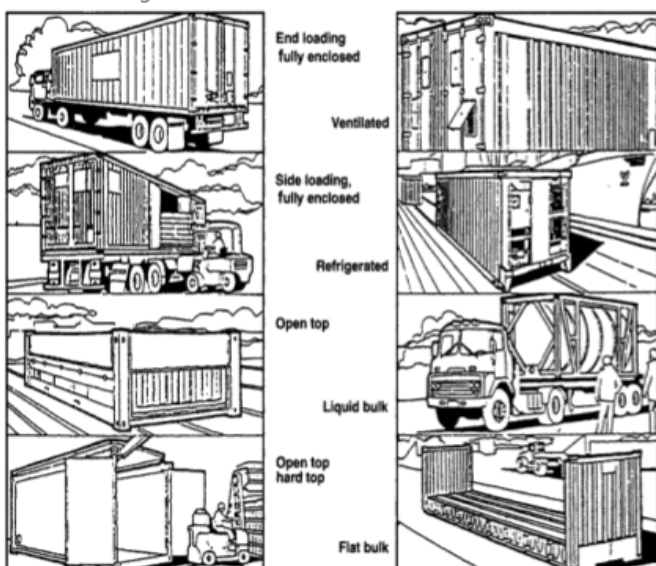
Recent reports show that only a few percent of intermodal loading units taking part in European Combined Transport did not feature a BIC- or ILU-Code. Full compliance with this identification regime is a pre-requisite of the efficient electronic information processing systems. UIRR was named in the standard EN13044 as the Administrator of the ILU-Code.

The New European Union Customs Code - to become effective as of May 2016 - prescribes that every loading unit entering or leaving the European Union via unaccompanied Combined Transport must feature either a BIC- or an ILU-Code (a necessity to fill in the required customs entry/exit inspection forms).



UIRR Launches Platform of Loading Unit Makers

December 2015



Intermodal Loading Units are the carriers of cargo that enable the efficient transshipment between the various modes of transport offered by Combined Transport.

The recent passage of Directive 2015/917 concerning weights and dimensions, and imminent implementation, will bring about the need to revise applicable standards related to loading units as well as the rail wagons which carry them.

With the intention to establish a meeting for regular consultation and cooperation, UIRR created the Platform for Loading Units Makers. The new platform will bring together the technical experts of CT Operators (active in UIRR's Technical Interest Group) and the manufacturers of loading units in order to jointly develop optimal technical solutions. The ultimate satisfaction of market expectations for high level services is only possible if all stakeholders collaborate effectively.

Fourth Railway Package Technical Pillar Implementation

December 2015

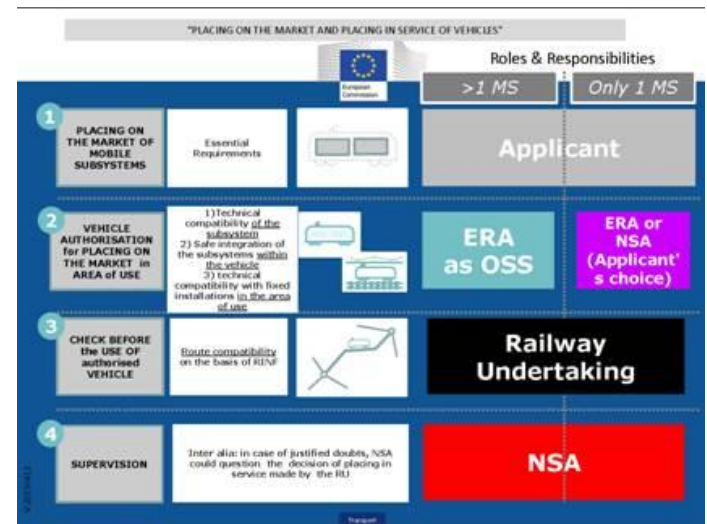


The finalisation and the formal adoption of the Fourth Railway Package are expected later in the course of 2016. The European Railway Agency, which will be substantially reorganised and even renamed (to European Union Agency for Railways) as a consequence. Work has begun to prepare for the implementation of the Technical Pillar: the new rules on rail safety and Interoperability. The Technical Pillar is also meant to reduce the costs and duration of authorisation procedures (European Single Safety Certificate, vehicle and ERTMS) and to streamline and harmonise the authorisation procedures at Union level.

- Vehicle authorisation is of prime importance to European CT Operators

- An enhanced role of the Agency in the Union rail system: act as single entry point (One-Stop-Shop) for vehicle authorisation and single safety certification
- A single process for vehicle authorisation
- Practical arrangements to be defined by implementing acts
- Emphasis on the role of each actor in the vehicle authorisation process

UIRR continues to follow and advise the implementation process especially related to wagon authorisation by looking into the definition of "placing on the market" vs. "placing into service", details of the Single Point of Entry for applicants, and other technical cases involving CT wagons.



Last Mile Study Update

December 2015

The DG MOVE study titled "User-friendly access to information on last mile infrastructure for rail freight" will be completed on March 2016. An important goal of this study is to facilitate data import from existing sources into the portal produced under the study, which requires a data model that is easy to update. Moreover, proposing an economic solution for the daily maintenance and operation of the portal is also part of the study. The internet portal providing easy access to data about last mile infrastructure for rail freight has been prototyped under the following address: <http://www.railfreightlocations.eu>.



This publicly accessible platform will include all relevant geographical information as well as access conditions on terminals, railports, public and private industrial sidings, stations with loading tracks, shunting yards, etc.

UIRR as part of the consortium plays an important role in the user requirements' validation, in the data quality assurance and in the conception of a business and operation model.

Together with its consortium partners, UIRR is presently conducting meetings with potential stakeholders in particular by involving the rail freight corridors.

UIC Loading Guidelines - Risk Assessment

December 2015



During the DESTINY project coordinated by UIRR, it was uncovered that the acceleration forces for the design of cargo load securing arrangements are different between road and rail - in particular for the longitudinal direction (1g for rail and 0.5g for road). This difference causes problems for shippers using CT.

The dynamic tests performed during the project (6 routes - 6,000 km) clearly demonstrated that 0.5g in longitudinal performance (both directions) is adequate for static design of cargo securing arrangements in Combined Transport (higher accelerations might occur but these are low impulse shocks with short durations). The DESTINY's results support current wording of the recently adopted CTU Code.

Based on these results, UIRR and UIC are closely collaborating in order to harmonise the acceleration values for CT in the different normative texts - in particular the UIC loading guidelines and the EN 12195-1 (Load restraining on road vehicles - Safety - Part 1: Calculation of securing forces).

A risk analysis was launched to demonstrate that the change from 1g to 0.5g should be acceptable to all stakeholders involved (terminal operators, CT operators and railway undertakings), thereby harmonising road and rail requirements for load securing. The analysis started in October 2015 will be finalised before Summer 2016; it is currently being evaluated by an external assessment body, Belgorail located in Belgium.

New Member: Ambrogio Trasporti

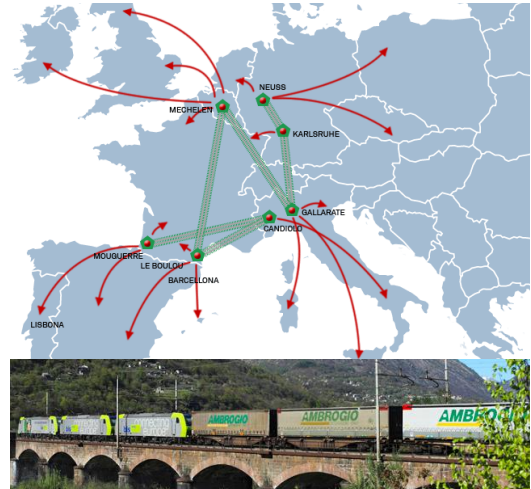
1 January 2016

Founded in 1957 and focused since its beginning on the European Market, Ambrogio Trasporti understood very early the problems of long distance road transportation in terms of safety, timing and costs for both the population and the environment.

Motivated by this conviction, in 1969 Ambrogio bet on the combined transportation system, integrating the best potential of road and rail, investing heavily in both infrastructure and specialised equipment to increase its effectiveness.

Ambrogio today is in the vanguard in Europe and has transport solutions able to combine the potential and large fleet size with very low pollutant emissions as its contribution to present and future environmental protection.

AMBROGIO
INTERMODAL ONLY



New Member: T3M

1 January 2016

T3M is a French Combined Rail-Road Transport Operator based in Montpellier (South of France) and operates on nine terminals in France and one in Italy: Lille, Bonneuil, Valenton, Bordeaux, Toulouse, Avignon, Fos/Mer, Marseille, Nancy and Novara.

The company was founded in 2000 by Jean-Claude Brunier, and it obtained in 2009 the authorized applicant status to control its own train paths.

T3M's twelve daily overnight trains run at 120km/h, they can be up to 850m long and weigh 1800Tbr.

The company belongs to Open Modal Group with TAB Rail Road (Rail Road Transport Company) and BTM (Terminal Operator). Consignments carried in 2015: 104 123.

T3M
OPÉRATEUR DE TRANSPORT COMBINÉ



New Member: Terminal Service Austria

1 January 2016

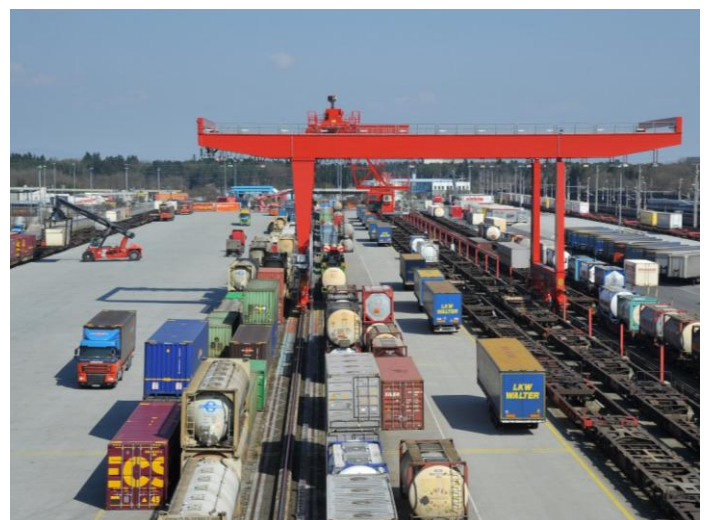
TSA is part of ÖBB-Infrastruktur AG since 2013 with its core business of managing intermodal terminals.

TSA terminals offer additional services like container storage, agency support for operators and railway undertakings, repair and cleaning, cooling and heating of containers, own handling equipment and a terminal IT system.

A neutral and non-discriminatory rail access to an intermodal terminal is a vital competitive factor. Therefore TSA established the last mile service from the rail network (closest station) into the terminals to ensure a seamless access to the terminals.

The opening of the new Rail Freight Centre Vienna South in 2016 and the upgrading and reconstruction of Rail Freight Centre Wolfurt (planned for 2018), TSA will be ready to face the challenge of increased Combined Transport traffic.

ÖBB
INFRA



Recent Appointments and Personnel News

UIC EUROPE

30 December 2015



Mr **Bernard GUILLELMON**, CEO of BLS (Switzerland) was elected the Chairman of UIC European Region during the 21st UIC Regional Assembly for Europe. The tenure of the UIC Europe Chairman is two years; hence it will last until the end of 2017. Mr Guillelmon succeeds former FS CEO, Mr Michele Marco Elia, in the position.

TRENITALIA

December 2015



Mr **Renato Mazzoncin** has been appointed CEO of Ferrovie dello Stato (FS), the state-owned Italian railway corporation. An electrical engineer by training, Mr Mazzoncin worked for Transystem of the Ansaldo Trasporti group, Autoguidovie of the Ranza group, Ataf Gestioni and Busitalia which belongs to the FS Group. Mr Mazzoncin succeeded the retiring Mr Michele Marco Elia as CEO of the FS Group.

Members' News

CFL INTERMODAL

5 January 2016

Study to look into establishing a regular CT train connection between China and Luxembourg

Click: <http://www.cfl.lu/associeretiongroupshores-et-mediainews-archiv/signature-d'He-Yi-Mo-Nguyen-mH4Amore-dHe-Yi-Mo-Nguyen-entre-pour-lHe-Yi-Mo-Nguyen-lHe-Yi-Mo-Nguyen-connexion-de-fret-ferroviaire-chine-luxembourg>

ROCOMBI

December 2015

Capabilities of the Bucuresti South Container Terminal Titan

Click: <http://www.rocombi.ro/>

TRANS-EURASIA

LOGISTICS

December 2015

New website available online

Click: <http://www.trans-eurasia-logistics.com/>

Key Dates & Events

| | |
|-----------------------|---|
| 23 February, Vienna | Launch Event of 4 Rail Freight Corridors |
| 15 March, Brussels | ERFA Annual Event |
| 22-25 March, Paris | SITL Conference and Exhibition |
| 7-8 April, Riga | IBS Conference |
| 19 April, Brussels | EU Road Conference |
| 26-27 April, Brussels | European Rail Summit |
| 10 May, Brussels | COM RU Dialogue Plenary |
| 10-12 May, Birmingham | Multimodal 2016 Conference and Exhibition |
| 19 May, Brussels | UIRR Annual General Assembly |
| 1 June, Switzerland | Ceremonial Inauguration of the Gotthard Base Tunnel |
| 8-9 June, Karlsruhe | ASE Forum 2016 - Güterverkehr 4.0 |
| 20-22 June, Rotterdam | TEN-T Days and Dutch Presidency Conference |
| 22-23 June, Rotterdam | UIC Global Rail Freight Conference |



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T3M

ADRIA KOMBI

CCE

Combiiberia

EMT

IFB

lugo terminal

ÖBB INFRA

RAILPORT AAR

TEE

AMBROGIO

CEMAT

combinant

FELB

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NAVILAND

POLZUG

ROLPIN

TEE

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