

# Combined Transport



## **Stagnation continues**

In the process of compiling the 2015 statistics of European CT it has been uncovered that the adverse effects of a combination of negative phenomena bearing upon European Combined Transport - oil price collapse, continued TAC increases versus stagnant/decreasing road tolls, rail infrastructure and quality inadequacies - were more severe than earlier anticipated and the capitalisation of CT Operators proved insufficient to counterbalance this challenge. Subsequently, the overall

transport performance of UIRR Operators will likely show stagnation for the year. Since no improvement is in sight regarding the aforementioned developments, the UIRR CT Sentiment Index remains 'neutral' for the 12 months going ahead.

With the beginning of 2016, UIRR has started to collect quarterly statistics from its CT Operator and Terminal Manager members. This data will be presented alongside the UIRR CT Sentiment Index in the quarterly UIRR Newsletter. The form will be an aggregate percentage showing the change between the actual performance of the current quarter of this year to the same period a year earlier. Accordingly, the UIRR CT Performance Indicator for Q1.2016 stood at -0.47%.

The short-term outlook of Combined Transport is most directly influenced by the overall economic and trade developments, the price of transport fuel and the changes in the charging for the use of the transport infrastructure. Perspectives in the longer run are determined by the earning ability of the sector, meaningful investments into transport infrastructure and the changes in the regulatory framework that should reflect policy preferences, such as the desire to curbing global warming, reducing pollution, accidents, congestion and oil dependency.

Economic growth, both in Europe and on a global level, has reduced to historic low levels, and trade is following this trend. The price of oil has declined to a range typical of the 1986-2004 period. Road tolling is stagnating or even declining in places like Germany, whereas track access charges continue to increase year after year. These developments are accurately reflected by the UIRR CT Performance Indicator in the first quarter of 2016.

The CT sector's ability to make use of the extreme low cost of capital is diminished by its limited earning ability, suppressed by low transport rates enabled by cheap oil. The ability of governments to invest into the transport infrastructure is limited by high public debt levels. Hence the focus is on governments shaping the regulatory framework along the declared policy preferences. This is the focus of UIRR when advocating energy taxation reform, the amendment of Eurovignette and the comprehensive revision of the Combined Transport Directive 92/106, while continuing to call for focused investment into the infrastructure of rail freight.

Ralf-Charley Schultze - President



Ceremonial Opening of the Gotthard Base Tunnel

Switzerland, 1 June 2016

http://www.gottardo2016.ch/en



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

NEUTRAL



# Regulatory Fitness test of Directive 92/106 completed

20 April 2016



Henrik, Hololei, Director General, DG MOVE

The European Combined Transport sector has been long waiting for the conclusion of the REFIT process concerning the Combined Transport Directive (92/106) - this was also discussed during a personal meeting with Henrik Hololei, the recently appointed Director General of DG MOVE.

The important Implementation Report for European Combined Transport stakeholders is downloadable:

- Executive summary: <u>http://ec.europa.eu/smart-</u> regulation/evaluation/search/download.do?documentId=17170414
- Full Report: <u>http://ec.europa.eu/smart-</u> regulation/evaluation/search/download.do?documentId=17165337

#### Most important findings of the Report are

- "The Directive continues to have a noticeable impact on the choice of Combined Transport."
- "The industry overwhelmingly indicated in the public consultation that similar results in the Combined Transport sector could not have been achieved with less burdensome measures." And "public administrators also agreed that the results could not have been achieved at lower cost."

 ..."due to problems identified under effectiveness and efficiency (of the Directive), the Combined Transport Directive does not currently realise its full potential added value at EU level", which refers to: "problems reported by the industry that relate mainly to the inconsistent transposition or implementation of the Directive".

UIRR first articulated its position - together with several of its stakeholder peers - in December 2014: http://www.uirr.com/en/component/downloads/downloads/1061.html.

This position was refined in a statement published in September 2015 (<u>http://www.uirr.com/en/component/downloads/downloads/1133.html</u>), in which the following was stated:

"While Directive 92/106 has been effective to promote Combined Transport, it should be refocused today to support the creation of a homogeneous regulatory framework for Intermodal Transport across the EU Member States. The recast Directive should include improved definitions, European rules to replace the diverging Member Statelevel practices crucial to the successful operation of intermodal/multimodal transport, techniques to catalyze the horizontal thinking required from policy-makers and means to measure the progress of Intermodal Transport's competitiveness."

UIRR is presently finalising its position paper on how the CT Operators and Terminal Managers that it represents would like to see the Directive reformulated - in order to better support the reaching of commonly shared EU Transport Policy aims.

## Infrastructure investment: EFSI vs CEF

14 March 2016



The European Fund for Strategic Investments (EFSI) is also known as the  $\epsilon_{315}$  billion "magic fund of European Commission President Jean-Claude Juncker" aiming to assist the economic recovery within the EU.

EFSI was created with the partial diversion of funds from the Connecting European Facility (Transport), or CEF Transport, which was adopted in 2013 to assist with the transport infrastructure developments needed to be financed by Member States in order to deliver on the common Transport Policy aims embedded in the TEN-T Regulation.

UIRR, together with 12 other transport sector associations, issued a statement to caution the European Legislator from excessive diversion of funds from CEF Transport as this could undermine the fulfilment of the TEN-T aims: http://www.uirr.com/en/component/downloads/downloads/1083.html.

In March 2016 the European Commission published its first "EFSI State of Play" Report on Transport, which features 10 transport-related projects of the first 54 topics EFSI provided funding for: http://ec.europa.eu/priorities/sites/beta-political/files/transport-ip-state-of-play-march-2016 en.pdf.

Considering the imbalances in transport infrastructure, road related investments were rendered a minor role within the *Specific sectoral objectives* of TEN-T (Article 4 of Regulation 1316/2013). This EFSI Transport Report emphasizes the worst fears as:

- 5 of the 10 projects (50%) went for outright road projects in Italy, Slovakia, France, Germany and The Netherlands, while
- 2 additional projects (in Spain) contained at least partially road-related components.

Subsequently, it may be considered proven that EFSI's transport projects will not contribute to the achieving of the TEN-T infrastructure development aims as efficiently as if the funds would have been spent through the CEF Transport facility. UIRR hereby raises its voice in favour of defending CEF Transport funds.







# EU Road Initiatives: What is to be expected?

19 April 2016

DG MOVE invited representatives of Member States (governments and agencies), the European Parliament and sector stakeholders to discuss the planned Road Initiatives (previously referred to as the Road Package), as announced in the 2016 Commission Work Programme.

This legislative initiative is designed to address several shortcomings of the regulatory framework of road transport in the European Union, including in particular aspects of:

- road safety,
- social provisions, and
- road charging (including internalisation).

The discussion of road safety was overshadowed by the recent release of road accident, injury and fatality statistics for 2014 (http://ec.europa.eu/transport/road safety/pdf/observatory/historical evol.pdf). The figures show an increase in the number of accidents (24.400 instances more than a year ago), an increase in the number of injured (30.000 persons more than in 2013), while the number of fatalities stagnated at 25.900 compared to 26.000 a year earlier. The poor figures are a suspected consequence of increased road traffic thanks to sharply reduced fuel prices.

Loopholes in existing legislation enable cheap labour to pour into road transport, especially long(er) distance trucking. The Commission is aiming to pluck the holes by proposing a revision of the Posting of Workers Directive (96/71) that would guarantee to truckers of foreign nationality the national minimum wage of the Member State within which they operate. Other measures considered are improving the minimum required comfort of the conditions of spending week-end breaks for drivers who are forced to do so in a foreign country, as well as enhanced enforcement of cabotage rules at roadside checks.

European Commission Mobility & Transport

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In a recent study by renowned expert of the topic, CE Delft (<u>https://www.transportenvironment.org/publications/are-trucks-taking-their-toll-ii</u>), trucks using EU roads alone were found to underpay their external costs to the tune of €100 billion annually.

UIRR received a response letter on behalf of the EU Commission from Mr Pierre Moscovici, the Commissioner for Economic and Financial Affairs, in which it was confirmed that the Juncker Commission does not plan to resubmit a revision of the Energy Taxation Directive (2003/69). Giving up on this most obvious and logical measure to facilitate internalisation of road transport's externalities related to the emission of greenhouse-gases, the Eurovignette Directive (2006/38) remains the only tool for much needed internalisation of road transport's extensive external costs.



# Combating the CO<sub>2</sub> emissions of road transport

16 February 2016

Leading European manufacturers of commercial road vehicles made their case at a conference organised in Brussels. It was claimed that fuel consumption of Euro VI vehicles sold today is up to 60% less than in 1965 - noting that more energy efficiency gains can not be achieved with the internal combustion engine.

New vehicles can not be improved any further in a meaningful way, while much more would be needed in CO<sub>2</sub> emissions reduction than appearing possible today. Hence the manufacturing sector is proposing a combination of measures:

- allowing longer and heavier vehicle combinations (i.e. megatrucks),
- resurfacing roads and replacing tyres with new designs offering lower friction (4% reduction),
- intelligent transport systems like platooning with a maximum potential of 5%,
- various technology improvements, and
- new operations methods like driver training.

Road infrastructure is heavily congested in large parts of Europe, it offers questionable safety, while it suffers from extensive maintenance deficiencies. Roads are already built to their current specifications due to the requirements of heavy goods vehicles (4m clearance, 11t axles), the same vehicles whose operators were found not to cover in excess of €100 billion of their external costs annually. Trucks performing long(er) distance assignments are relatively few in number, whereas they are responsible for half of the tonne-kilometre performance of road haulage. Platooning, protruding aerodynamic devices, low friction pavement and tyres all make sense only on longer distances and at higher speeds.

UIRR recommends that the top speed of trucks is uniformly set at 80km/h within the EU and is coupled with an efficient enforcement regime built on digital tachographs and other ITS solutions. Such a measure could not only reduce fuel consumption, but also make most protruding aerodynamic devices meaningless, as well as contribute to safety. Such a regulatory message would induce manufacturers to offer smaller, more efficient engines and guide them towards sensible development.



### Transport R&D: are resources put to where they should be?

February 2016

Research and innovation only makes sense if the technologies and new solutions devised can be sold to the market, if their implementation and daily use makes good business sense. A fundamental prerequisite is the earning ability of a sector, or economic activity. This should be framed by a regulatory environment which adequately reflects the expectations of society at large, which the economy must serve.



Shift2Rail is a research programme created with broad sector support and initiated and co-funded by the European Union.

There are considerable concerns that advances achieved under the guise of the Shift2Rail initiative will not be affordable to either rail infrastructure managers or railway service providers. Infrastructure managers may be limited by funding restrictions stemming from state ownership, while railway undertakings may be limited by inadequate earning capability.

The European legislator should look closely at the road sector where research is mostly financed using private resources. The regulatory framework of road transport, and longer distance freight transport in particular, is a beneficiary of a reluctance of EU Member States to agree to internalisation of the road sector's external costs, the lack of a fair, European level usage-based road tolling scheme, heterogeneous operating rules and enforcement. In such an environment road technology developers find private resources for research and innovation with relative ease, since there are ample willing buyers for products and services even if they promise only a minimal marginal benefit. According to ACEA the European automobile industry invests  $\epsilon_{41.5}$  billion into R&D annually, a whopping 5% of its annual turnover.

Highly beneficial rail developments, which promise a much greater marginal boost to efficiency, continue to require substantial public resources, since the regulatory framework does not enable the necessary purchasing power - the numbers simply do not add up.

Longer and heavier freight trains, interoperable signalling, inefficient communications and other digital solutions are thereby arriving to the rail sector with considerable delays, seriously affecting productivity and performance outlook. The absence of private capital from railways is also a visible proof of these deficiencies. And without private capital, the management methods, know-how and talent, which helps road haulage make the best of itself, also remains absent.

UIRR has long advocated the creation of a European regulatory framework, which offers an unequivocal indication to the private sector in which direction society's interests go. Private capital must be given the same guaranties if investing into rail as the protection that is being given to capital involved in the road sector. The European Legislator is encouraged to consider these anomalies when formulating the needs and interests of society into directives and regulations.

# **Standardisation for Combined Transport**

#### April 2015

Combined Transport needs standardised solutions in four aspects of the intermodal transport chain:

- infrastructure side,
- rail rolling stock,
- Ioading units, and
- digitalisation (support systems and documentation).

Rail-related standardisation needs extend from agreeing a new CT reference wagon (as currently a 40-year-old design is used for codification of infrastructure) and the implementation of electrically powered disc brakes, which will also solve the electricity on-board requirement. Electricity would be needed for many applications ranging from powering refrigerated loading units to intelligent sensors needed for predictive maintenance to data transfer for smart applications.

Operational standards would need to be developed for uniformly agreed loading schemes, as well as codification to determine compatibility of trains (wagon/ loading unit) with particular lines.

Standard procedures for paperless legal and administrative processes must also be agreed, which should take the needs of Combined Transport into account; these are digitalisation of transport documents, tracking-and-tracing and traffic-related data exchange, dangerous goods transport-related administrative and safety procedures.

Loading unit standardisation needs to begin with the 45-foot pallet-wide container made possible by the recent revision of Directive 96/53 on weights and dimensions. Secondly, a standard envelope must be agreed for (craneable) semi-trailers, while the idea of the 14.92 metre-long semi-trailer must also be studied.

UIRR actively participates in the various CT-related standardisation activities at ERA, UIC, RNE, CEN, OTIF, CIT, ISO and UNECE in order to ensure the CT-compatibility of the various relevant standards. Next to DG MOVE's transport statistics coordination platform, which UIRR is a member of, a Technical Annex should be added to Directive 92/106 during its amendment to define the necessary standardisation mandates.

Combined Transport in Brief



Q1.2016 | 10 May 2016

## Illegal state aid: infrastructure charging

January 2016

When it comes to charging for the use of infrastructure in transport, few dispute that both the regulatory framework and the actual practice of Member States are at best not in balance across the modes. Take the 1868 Mannheim Convention - still in force today - for instance, which prohibits any charging for navigating the river Rhine (despite the numerous locks and other engineering structures needed to make the river navigable).

Looking at railway track access charging, despite an EU level legislative framework, it ranges from  $\epsilon$ 0.13 to  $\epsilon$ 9.97 per train kilometre (see graph from the 2014 COM RMMS Report below).



The state of the art in road tolling (of trucks) is even more diverse: 3 Member States do not charge at all (FI, EE, CY), 9 others charge on a time-basis (vignette), 8 use toll booths where the payable toll may, or may-not be directly linked to the distance travelled, and 8 employ electronic distance-based toll systems. The extent of charging also differs: while every kilometre of rail infrastructure used is subject to a charge, road tolling systems typically apply only to a fraction of the road network (while a symbolic vehicle tax is charged to cover the costs of the remaining majority portion). The range of tolls may also vary between  $\varepsilon 0.45$  per vehicle kilometre. ACEA, the European Automotive Manufacturers' Association, indicated at its recent conference that "road tax amounts to 2% of the total cost of a typical long-haul road transport operator in Europe", whereas the same costs of rail freight undertakings may be as high as 35%!

While the diversity of charging for the use of transport infrastructure makes comparison of the relative position of modes difficult, it can be easily stated that truckers enjoy in this regard a more favourable situation within the overland freight transport market than freight train operators. Hence it may also be said that desirable change, if any, should be in the direction of homogenising road tolling to an electronic distance-based system and then harmonising toll levels.

Nevertheless, several Member States follow an infrastructure charging policy that is contrary to this logic. The Netherlands recently abandoned a decision to introduce a distance-based electronic toll (within a year from its planned inauguration) to return to a vignette system. Germany reduced its toll levels, while continued to increase applicable track access charges. Croatia's Minister of Transport recently suggested that "a vignette system would be cheaper to collect the same revenues" than the current distance-based tolling. All these measures fail to correct the prevailing regulatory imbalance and as a matter of fact make the unfair status-quo even worse. They are equal to extending (illegal) state aid to one particular (competing) mode of transport within the overland freight transport market: road.

# Illegal state aid: regulatory favouritism and government support

January 2016

Regulatory requirements in transport are mainly in place to ensure safety. These regulations, such as driver's licensing, traffic worthiness testing, vehicle registration, vehicle taxes, etc., are a source of significant costs for each mode of transport.

When viewing the relative safety performance of modes competing in the land freight transport market of the European Union, it is obvious that regulation does not reach the ultimate aim of minimising accidents.

The regulatory requirements should be focused on their purpose (mission) and governments should constantly consider improving their effectiveness, while reducing related costs. If however a regulatory requirement is changed - considering the significant related costs - it should be done fairly and evenly, so as not to disturb the relative balance of competing modes.

A negative example in this respect is Hungary where the government offered to train 6000 truck drivers and implement significant easing to advantage (domestic) road hauliers, while leaving the regulatory burden of rail freight operators unchanged. Subsequently, road hauliers will save tens of millions of euros of cost a year on training and various regulatory expenses. This is also an excellent example of illegal state aid as the government - using public money - has brought one group of competitors in the land freight transport market (road hauliers) into an advantageous position over their alternatives, which include rail freight and Combined Transport.

Graph 17 - Track access charge 1000 gross tonne freight train (EUR/train-km) in 2014



# Last Mile Study: final deliverables

December 2015

The structure of the European rail freight market has profoundly changed during the last two decades influenced by two important drivers: the railway market liberalisation with the appearance of new entrants and the lack of data availability and accessibility for all stakeholders.

The lack of an easy and quick access to information about last mile infrastructure for rail freight has become an important barrier for the planning of rail-based transport solutions, in particular across borders. The Commission (DG MOVE) has therefore taken the step to support the market with the study on "User-Friendly access to information on last mile infrastructure for rail freight" with the winning partners HaCon (coordinator) and UIC supported by UIRR, Triona and IT Kreativa (subcontractors).

The general objectives of the European study was:

- to resolve these difficulties by developing an EU-wide webbased portal with GIS functionalities, capable to present in a consistent way all relevant data for different kinds of last mile infrastructure (loading facility, transfer stations and connecting lines).
- to propose maintenance procedures and identify potential entities to manage such a portal on a permanent basis.

#### Figure 1: Components of "Last-mile infrastructure"





#### WP1 - Identification and analysis of user needs

The methodology for the identification of these user needs and the elaboration of a requirement profile followed a multi-level approach: classification of last mile infrastructure into main types and their occurrence in Europe, identification of interested stakeholders, compilation of relevant information items per type of last mile facility.

#### WP 2 - Identification and description of primary data sources

Currently, a comprehensive European database does not exist. Instead, existing databases and information portals generally focus on specific geographical regions or types of infrastructure. WP2 analysed and evaluated the existing databases.

#### WP3 - Identification and comparative analysis of existing webbased information portals

More than 30 portals have been identified and evaluated regarding their exploitation potential for the European last mile portal.

#### WP 4 - Setting up a web-based information portal

Based on the results of WP1, WP2 and WP3 it was finally decided to develop a new portal with the support of some data providers. The final prototype is available on <u>www.railfreightlocations.eu</u>.



The study elaborated recommendations to the Commission in order to permanently manage the developed web-based information portal. UIRR is convinced that this portal will effectively serve the development of the European Combined Transport sector.

## **UIRR Statistics Programme: recent improvements**

January 2016

Importance of having accurate information can not be overestimated in today's world. UIRR runs its statistics programme with a view to provide accurate information on the reality and trends in the European Combined Transport sector.

In this spirit, UIRR has been providing its data to Eurostat (for inclusion in its official transport statistics publications), and also developed indices like the CT Sentiment Index and the CT Growth Index.

The latest additions to the UIRR statistics services are:

- Quarterly CT Performance Indicator based on actual performance figures delivered by UIRR's Operator and Terminal Manager members (also see p.1).
- Terminal-related annual data provision will also be enriched with new components starting from 2015 - to be published within the upcoming UIRR Report 2015-16.



# ILU-Code: new General Terms and Conditions

14 March 2016



The General Terms and Conditions (GTC) of the ILU-Code (<u>http://www.ilu-code.eu/en/general-terms</u>), the unique identifier of European intermodal loading units, have changed on 15 March 2016.

Instances of loading units marked with unregistered or expired owner-keys were recently reported to UIRR. This motivated the change, which saw the insertion of provisions concerning the unauthorised use of the ILU-Code (see new provision 3.4.2) and the obligations of the owner of loading units which contain an unauthorised ILU-Code identifier (article 3.4.3). In case of noncompliance, UIRR as the Administrator of the ILU-Code will have

## New Member: RCO CSKD

1 January 2016

RCO CSKD is part of the Rail Cargo Group. RCO creates attractive high-frequency long-distance connections to the business centers of North Western and South Eastern Europe, from which resellers can also profit.

Through customised logistics and transport solutions as well as transports to and from the main ports and terminals, RCO is helping to strengthen the importance of the railway as a transport mode.

RCO connects European economic centers several times a week and links all the advantages of rail and road in one transport chain – whether with containers or swap bodies, trailers or trucks. Depending on the requirement, RCO wraps rail shipments into complete trains, wagon groups or single wagons and provides sophisticated intermodal logistics concepts, system trains and a wide selection of train products.

UIRR founding member Ökombi and Intercontainer Austria, which joined in 2005, were merged into RCO in 2012. Subsequently, the joining of RCO CSKD is viewed as the beginning of the return of UIRR's former Austrian members.



<u>www.ilu-code.eu</u>

to turn to the relevant courts to order the removal of the unauthorised ILU-Code markings.

UIRR is launching an IT solution thanks to which Terminal Managers and CT Operators can easily install a control routine into their IT systems that will automatically signal if an unauthorised ILU-Code has been entered during check-in or booking. The system will send an automatic notification to UIRR, which shall enable the contacting of the owner of the loading unit to rectify the unlawful practice.

BIC- or ILU-Code compliance at terminals reporting to UIRR has exceeded 95% by the end of 2015, which is encouraging as both Terminal Managers and CT Operators will only commence with the efficiency boosting investments upon close to full compliance with this identification regime.

The European lawmaker was collaborating with the Combined Transport sector when it mandated BIC- or ILU-Code marking of all intermodal loading units leaving or entering the territory of the European Union within the Modernised Union Customs Code. A similar provision is expected to be included for all intra-EU transports within the upcoming revision of the Combined Transport Directive (92/106).

Standardised identifiers are an essential prerequisite to unlocking the productivity gains that digitalisation would enable in Combined Transport. All stakeholders who own intermodal loading units are encouraged to register their owner identification codes.





## **Recent Appointments and Personnel News**

SHIFT<sub>2</sub>RAIL 17 February 2016



Mr Carlo BORGHINI, has been appointed the first Executive Director of the Commission's Shift2Rail rail research initiative. Previously he has served as the Corporate Services Director at the European Defence Agency, while from 2008 to 2014 he served as the Deputy Executive Director of SESAR. Mr Borghini's nomination will last for a period of 5 years.

**INTERFERRYBOATS** May 2016



Mr Sam Bruynseels has been appointed CEO of Interferryboats (IFB), the oldest CT Operator of Europe founded in 1923. With multiple masters degrees in management, Mr Bruynseels fulfilled several roles within the B Logistics Group that included the positions of Chief Commercial Officer, Director of HR and (re)Organisation, as well as board memberships in several subsidiaries.

## **Members' News**

**KOMBIVERKEHR** 18 April 2016

Labelling of transport units containing hazardous goods Click: https://www.kombiverkehr.de/en/service/customers/news/:labelling\_of\_transport\_units\_containing\_hazardous\_goods

# **Key Dates & Events**

10-12 May, Birmingham	Multimodal 2016 Conference and Exhibition	Image: Constraint of the
12-13 May, Shenzhen	UIC- FIATA Multimodal Transport Institute conference	
<b>19 May</b> , Brussels	UIRR Annual General Assembly	
26 May, Montpellier	RFC6 TAG/RAG meeting	
27 May, Brussels	DG MOVE/SERAC Rail Freight Corridor Working Group meeting	
<b>1 June,</b> Switzerland	Ceremonial Inauguration of the Gotthard Base Tunnel	
8-9 June, Karlsruhe	ASE Forum 2016 - Güterverkehr 4.0	
<b>10 June,</b> Vienna	First RFC TAG Speakers' Coordination Meeting	
20-22 June, Rotterdam	TEN-T Days and Dutch Presidency Conference	
<b>21 June</b> , Rotterdam	Rail Freight Corridors' Business Conference	
22-23 June, Rotterdam	UIC Global Rail Freight Conference	
<b>7 July</b> , Den Hague	RFC1 TAG Meeting	
15-16 September, Hamburg	BME/VDV Intermodalkongress	
<b>15 November</b> , Brussels	European Logistics Platform Conference	
15-17 November, Rotterdam	Intermodal Europe 2016	

