S.I.N.G.E.R. Conference
Ljubljana, June 8th, 2006
• Introduction
  Mr. Rok Svetek, Managing Director of Adria kombi

• Opening speech
  Mr. Janez Sušnik, The President of the National Council of the Republic of Slovenia and the President of Adria kombi

• Marco Polo Programme
  Mrs. Anne M. Barseth, Project Officer, European Commission DG TREN

• UIRRR’s strategy for the EU enlargement
  Mr. Martin Burkhardt, Director General UIRRR
The Marco Polo Programme

Presented by

Anne Bårseth

DG TREN
G3 – Motorways of the Sea & Intermodality

SINGER Conference
Ljubljana, 8th of June 2006
The Marco Polo Programme
Key Features
- Common to all supported Types of Action -

- Introduction
  ◆ Road freight traffic increase: around 20 billion tkm/year for EU 25

- Objective: Shift *international* increase off road

- Duration: 2003 - 2010

- Budget: 102 Mio€ for 2003 - 2006

- Scope
  ◆ Services only, i.e. no RTD, no studies, no (core) infrastructure
Eligible type of legal entity

- Commercial undertakings only

Eligible to participate in a project consortium, if entity situated in

- EU Member States
- “Close third country”, e.g. Candidate Countries, Mediterranean Countries

Eligible for EC-funding and full participation if costs arise only on territory of

- EU25 Member States
- EFTA & EEA States after conclusion of specific agreement
- Candidate States after Memoranda of Understanding (BG, RO, TY, CR)
- Full participation of: EFTA/EEA and Romania, probably Croatia and Bulgaria for 2006.

European dimension

- International trajectories, involving the territories of at least one EU Member State and a “close third country”
- At least 2 undertakings situated in 2 different eligible countries, of which at least 1 must be in EU.
Programme Structure

The 3 Types of Action

- **Modal shift actions**
  - Robust, but not innovative: *just shift freight off road*
  - Subsidy of 1 € per 500 tkm shifted
  - Minimum subsidy threshold 500 million €; Subsidy rate up to 30%
  - => at least 250 million tkm shifted per contract; duration up to 3 years

- **Catalyst actions** f. ex. high speed freight trains on internat. routes
  - Overcome structural market barriers
  - Highly innovative: *causing a real break through*; duration up to 4 years
  - Minimum subsidy threshold 1.5 million €; Subsidy rate up to 35%

- **Common learning actions** f. ex. European training centres
  - co-operation and sharing of know-how
  - Mutual training: *coping with an increasingly complex transport and logistics market*; duration up to 2 years
  - Minimum subsidy threshold 250 million €; Subsidy rate up to 50%

- **Avoidance of undue distortion of competition**
Timetable - MP’s Start-up & First Calls-

- **02 August 2003**  Publication of programme in Official Journal of the EU (OJ (2003) L 196/1)

- **03 August 2003**  Programme enters into force

- **First Call (budget: 15 mill.)**
  - **11 Oct. 2003**  Call for proposals
  - **10 Dec. 2003**  Deadline for proposal submission
  - 92 Proposals, 87 eligible to enter the evaluation
  - **Oct.-Dec. 2004**  Contract signatures (incl. reserve list) - 13 projects finally contracted

- **Second Call (budget: 20,4 mill.)**
  - **15 Oct. 2004**  Call for proposals
  - **15 Dec. 2004**  Deadline for proposal submission
  - 62 Proposals, 59 eligible to enter the evaluation
  - December 2005  Contract signatures – 12 projects finally contracted
Third Call (budget: EUR 30.1 million)
- 24 November 05 Call for proposals
- 30 January 05 Deadline for proposal submission

63 Proposals, 60 eligible to enter the evaluation
- May 2006 Applicants informed of results & Start of contr. negotiations - 17 projects selected for funding
- 12/13 July 2006 Programme Committee meeting (participating countries)
- Autumn 2006 Contract signatures (incl. reserve list)

Fourth Call (budget: EUR 35 million)
- Mid July 06 Call for proposals
- Sept./Oct. 06 Deadline for proposal submission
- Early 2007 Applicants informed of results & Start of contr. negotiations
- Summer 07 Contract signatures (incl. reserve list)

Start-up of Marco Polo II (subject to successful conclusion of legislative procedure)
- 01.01.2007 Start of programme (MP I would then stop)
Marco Polo II

MP II (2007-2013)

Increase of budget 400 million € (based on 2004 figures, 450 € including inflation)

✦ Introduce 2 new innovative types of action:
  ➢ Motorways of the Sea (complementary to TEN: service bound, ancillary only, short term – 60 months max, min. subvention: 2,5 million €)
  ➢ Traffic Avoidance (practical solutions to reduce the number of trucks on the road, max 60 months, min. subvention: 1 million €)

✦ Upgrade ancillary infrastructure support for catalyst -, traffic avoidance - and motorways of the sea actions (limited infrastr. support in modal shift actions, “the Community shall examine the possibility of supporting ancillary infrastructure projects”)

✦ Wider Europe welcome to fully participate via special agreements (add. Budget!) All close third countries can participate fully to MP II
Marco Polo II

- 17 May 2006: Parliament’s First Reading adopted
- 8/9 June 2006: Council’s Common Position
- Autumn 2006: Publication in the OJ
- 01.01.2007: Start of MP II Programme
- First semester 2007: First Call for Proposals
Marco Polo Programmes:
Help Desk:
http://europa.eu.int/comm/transport/marcopolo/index_en.htm
Email: tren-maro-polo@ec.europa.eu
Tel: +32 (02) 29-96448
Fax: +32 (02) 29-63765
UIRR's strategy for the EU enlargement

Martin Burkhardt
Director General UIRR
Why Combined Transport?

GENERAL ADVANTAGES

– relief of the road network
– transfer of goods to a safer and more environment-friendly transport mode, which is also more independent from climatic conditions
– better sharing of transport volumes between modes
– recourse to available transport capacities
– co-operative activity combining the advantages of road (flexibility) and rail (more economical, mass transport on larger distances)
– competitiveness in given circumstances
### Why Combined Transport?

#### ENVIRONMENTAL BENEFITS

<table>
<thead>
<tr>
<th></th>
<th>Reduction in CO₂ emission</th>
<th>Energy savings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unaccompanied CT</td>
<td>60%</td>
<td>29%</td>
</tr>
<tr>
<td>- sample of 18 axes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accompanied CT</td>
<td>23%</td>
<td>11%</td>
</tr>
<tr>
<td>- sample of 2 axes</td>
<td></td>
<td></td>
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</tbody>
</table>
The UIRR in brief

TWO-LEVEL ORGANISATION (decentralised structure)

- 1 Liaison Office Brussels
  - overall promotion of CT
  - coordination of members’ activities
  - service centre (projects, reports)

- 20 Member Companies
  - 19 active members & 1 associated member
  - organising and marketing of CT
  - wagons in ownership
  - management of transhipment yards (terminals)

Main Objective: Shift traffic from road to rail
UIRRR Members

More than 2.5 Mio lorry equivalents shifted in 2005 from Road to Rail

Tripling of international traffic in 15 years

Doubling total volume in 15 years
UIRR
Main Traffic flows

Two thirds: alpine crossing traffic
Why?
- geographical obstacle
- investment in rail
- road tolls
Eastern Europe: Proportion per UIRR company (international traffic)
Proportion East/West international traffic

<table>
<thead>
<tr>
<th>Year</th>
<th>Central/Eastern Europe</th>
<th>Western Europe</th>
</tr>
</thead>
<tbody>
<tr>
<td>95</td>
<td>100,000</td>
<td>900,000</td>
</tr>
<tr>
<td>96</td>
<td>105,000</td>
<td>895,000</td>
</tr>
<tr>
<td>97</td>
<td>110,000</td>
<td>890,000</td>
</tr>
<tr>
<td>98</td>
<td>115,000</td>
<td>885,000</td>
</tr>
<tr>
<td>99</td>
<td>120,000</td>
<td>880,000</td>
</tr>
<tr>
<td>00</td>
<td>125,000</td>
<td>875,000</td>
</tr>
<tr>
<td>01</td>
<td>130,000</td>
<td>870,000</td>
</tr>
<tr>
<td>02</td>
<td>135,000</td>
<td>865,000</td>
</tr>
<tr>
<td>03</td>
<td>140,000</td>
<td>860,000</td>
</tr>
<tr>
<td>04</td>
<td>145,000</td>
<td>855,000</td>
</tr>
<tr>
<td>05</td>
<td>150,000</td>
<td>850,000</td>
</tr>
</tbody>
</table>

Slovenian INtermodal Gateway to European Rail
UIRR international traffic: Evolution between 2003 and 2005

Before EU enlargement (2003)
- Central/Eastern Europe: 11%
- Western Europe: 89%

After EU enlargement (2005)
- Central/Eastern Europe: 5%
- Western Europe: 95%

Dramatic drop of RoMo traffic
Proportion of CT techniques: on the way to adaptation

⇒ from Rolling Motorway to unaccompanied traffic

**Before EU enlargement (2003)**
- Central/Eastern Europe: 84.1%
- Western Europe: 79.3%

**After EU enlargement (2005)**
- Central/Eastern Europe: 66.1%
- Western Europe: 85.2%
Quality control 1999-2005: East/West corridors (Unaccompanied Traffic)

<table>
<thead>
<tr>
<th></th>
<th>1999</th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of trains</td>
<td>748</td>
<td>630</td>
<td>1286</td>
<td>1394</td>
<td>1288</td>
<td>1728</td>
<td>873</td>
</tr>
<tr>
<td>On Time</td>
<td>43%</td>
<td>42%</td>
<td>44%</td>
<td>59%</td>
<td>42%</td>
<td>59%</td>
<td>65%</td>
</tr>
<tr>
<td>Delayed</td>
<td>57%</td>
<td>58%</td>
<td>56%</td>
<td>41%</td>
<td>58%</td>
<td>41%</td>
<td>35%</td>
</tr>
<tr>
<td>More than 3 hours</td>
<td>23%</td>
<td>24%</td>
<td>18%</td>
<td>15%</td>
<td>30%</td>
<td>24%</td>
<td>21%</td>
</tr>
<tr>
<td>More than 24 hours</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

On time = first unit ready for pick-up (under the crane) with tolerance of 30 minutes
Conditions for success

– Infrastructure
  • Rail (track gauges generally good)
  • Track conditions: upgrade 22,5t at 120 km/h
  • Terminals (e.g. BILK in Budapest)
  • Wagons
  • Loading units

– Better (international) cooperation between IMs, RUs-IMs, international traction by RUs

– Customer oriented driven attitude
  • Set-up of Quality Groups ‘Railway Undertakings and CT operators’
Conclusions

– Deep market changes
  • Complete road liberalisation – rail must follow
  • From RoMo to Unaccompanied System

– Need for ‘sustainable mobility’
  • Better political framework conditions (user-pays)
  • Rail liberalisation: clear separation between operations and infrastructure
  • More financial support for unaccompanied services for Central/Eastern countries: Marco Polo - SINGER
THANK YOU FOR YOUR ATTENTION

Mr. Martin Burkhardt
Phone +32 2 548 78 90
E-Mail mburkhardt@uirr.com
Internet www.uirr.com
• Presentation of the Slovenian Railways
  Mr. Igor Hribar, Assistant Executive Director for Freight, Holding Slovenian Railways

• Presentation of the Port of Koper
  Mr. Gordan Ban, Advisor Shipping Business Development, Port of Koper

• Presentation of the project SINGER
  Mr. Janez Merlak, Project Manager, Adria kombi
Freight transport of Slovenian Railways

Igor Hribar
Assistant Executive Director for Freight Transportation

Holding Slovenske železnice, d.o.o.
Tovorni promet/Freight transport
Ljubljana, 15.02.2006
Key Facts Of SŽ-Freight

SŽ-Freight is the largest rail freight transporter in Slovenia
SŽ-Freight is the largest exporter of services in Slovenia.
Positive development of transport volume and revenue
Increased productivity of resources

<table>
<thead>
<tr>
<th>Results</th>
<th>2004</th>
<th>2005</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transport revenue (Mio EUR)</td>
<td>115</td>
<td>116</td>
</tr>
<tr>
<td>Goods transported (Mio t)</td>
<td>17,9</td>
<td>18,1</td>
</tr>
<tr>
<td>Work performed (Bio ntkm)</td>
<td>3,5</td>
<td>3,6</td>
</tr>
<tr>
<td>Train Km (Mio trkm)</td>
<td>7,6</td>
<td>7,5</td>
</tr>
<tr>
<td>Average nr. of trains/day</td>
<td>222</td>
<td>206</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Resources</th>
<th>2004</th>
<th>2005</th>
</tr>
</thead>
<tbody>
<tr>
<td>Locomotives</td>
<td>130</td>
<td>130</td>
</tr>
<tr>
<td>Wagons</td>
<td>4.153</td>
<td>4.284</td>
</tr>
</tbody>
</table>

SŽ-Freight is an offensive rail freight market player on the Corridors 5 and 10
Growing Performance In Freight Traffic

Market development activities:

- positioning on key markets in SE Europe
- development of an operative international sales network
- development of new block train services in international traffic

SŽ-Freight is significantly increasing the transport volume since 2002
SŽ-Freight Compared With Other European Rail Operators

**bio ntkm**

<table>
<thead>
<tr>
<th>Operator</th>
<th>bio ntkm</th>
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<tbody>
<tr>
<td>Railion D</td>
<td>72</td>
</tr>
<tr>
<td>SNCF</td>
<td>50</td>
</tr>
<tr>
<td>PKP</td>
<td>47</td>
</tr>
<tr>
<td>ČD</td>
<td>18</td>
</tr>
<tr>
<td>ZSSK</td>
<td>15</td>
</tr>
<tr>
<td>MAV</td>
<td>10</td>
</tr>
<tr>
<td>Railion N</td>
<td>4</td>
</tr>
<tr>
<td>SŽ-Freight</td>
<td>3</td>
</tr>
<tr>
<td>Railion DK</td>
<td>2</td>
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</tbody>
</table>

**tons per capita**

<table>
<thead>
<tr>
<th>Country</th>
<th>tons per capita</th>
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</thead>
<tbody>
<tr>
<td>A</td>
<td>11</td>
</tr>
<tr>
<td>CH</td>
<td>8.9</td>
</tr>
<tr>
<td>CZ</td>
<td>8.5</td>
</tr>
<tr>
<td>SI</td>
<td>8.2</td>
</tr>
<tr>
<td>PL</td>
<td>4.3</td>
</tr>
<tr>
<td>HU</td>
<td>4.3</td>
</tr>
<tr>
<td>RO</td>
<td>3.2</td>
</tr>
<tr>
<td>D</td>
<td>3.3</td>
</tr>
<tr>
<td>FR</td>
<td>2.1</td>
</tr>
<tr>
<td>IT</td>
<td>1.3</td>
</tr>
</tbody>
</table>

Source: UIC 2002

Source: UIC 2003
Growing Importance of Intermodal Business

- Intermodal business is one of the fastest growing businesses of SŽ.
- Share of the intermodal business (in tons) has increased from 9% (1998) to 18% (2005).
- Average annual growth rates achieved (2005/2000):
  - Ro-La: 16% p.a.
  - Containers: 15% p.a.
Ro-La and Container Segments Drive the Growth of the Intermodal Business

- Share of the Ro-La business exceeds the 50% mark
- After some weaker growth until 2003, container traffic started to develop with impressive dynamic
- New connections in transit and inland traffic stimulate further growth of the intermodal transportation
Three Key Strategic elements of SŽ Cargo

- **PRODUCTS/SERVICES**
  - Type of products and services
  - Sale offer/value delivered
  - Structure and scope of necessary resources
  - Structure and intensity of competition

- **MARKET PRESENCE**
  - Utilization of natural position
  - Control of the transport flows
  - Development of direct contacts with decision-makers on key markets

- **GEOGRAPHIC LOCATION**
  - Type of products and services
  - Degree of internationalization
  - Elements and performance of internal systems and processes
Strategic model of SŽ-Freight

Strategic Orientation

- Building strong market position with new services
- Carrier role, focusing on its key competencies in railway transportation
- Regional leadership, strong market presence in the SE Europe
- Cooperation directed into business development

SŽ-Freight is committed to excellence in its core activities
Investments In The Rolling Stock Are Supporting The Realization Of SŽ-Freight’s Strategic Goals

20 new 3-system locomotives (2006-07)
- ownership of strategic resources
- flexibility of international rail freight services
- exploiting long-haul possibilities
- managing and control over cross-border services

100 new freight wagons (2006)
- responding to the market demand
- adapting the wagon fleet structure to the future growth potentials
- increasing the utilization rate and the cost efficiency of the wagon fleet
Major Markets of Slovenian Railways

Most important markets of Slovenian Railways

- Ljubljana: 0.8 mio t
- Wien: 0.7 mio t
- München: 0.7 mio t
- Bratislava: 2.1 mio t
- Budapest: 6.7 mio t
- Zagreb: 2.6 mio t
- Beograd: 1.9 mio t
- Source: SŽ-TP, in mio t 2005
Representative offices of Slovenian Railways

SŽ Cargo is represented with its offices on the key markets of Austria, Italy, Hungary, Bosnia and Serbia.

Main tasks:
- sales support on international markets
- information and operational support to the customers abroad
- market research
International Co-operation of SŽ

<table>
<thead>
<tr>
<th></th>
<th>Production</th>
<th>Sales</th>
<th>Products</th>
<th>IT</th>
</tr>
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<tbody>
<tr>
<td>ÖBB</td>
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<td>TI</td>
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<td>MAV</td>
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<td>ŽBH</td>
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<tr>
<td>TCDD</td>
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</table>
90% of the traffic volume handled by Slovenian railways has its origin or destination in other countries.

One half of the transport volume carried are transit traffic volumes.

Managing the transit traffic is of vital importance for further growth of rail freight traffic.
Hinterland Terminals (Ljubljana and Sežana/Divača)

**Gateway Slovenia**
- Warehousing
- Intermodal Terminal
- Car Terminal
- Direct Train Formation
- Additional Logistic Services

**Terminal Sežana**
- Trans-bording (SLO-I)
- Warehousing
- Direct Train Formation

Koper – Ljubljana = 152 km
The Network System of Conventional Products

The Network

- **Ljubljana Line**
  Munich - Ljubljana

- **East Gate Express**
  Milano – Ljubljana

- **East-West Rail Shuttle**
  Bologna – Ljubljana

- **Sava Express**
  Beograd – Ljubljana

- **East Express**
  Istanbul – Ljubljana

- **Curtici - Ljubljana**

- **Miskolc - Ljubljana**
Objective of Slovenian Railways is the achievement of a majority market share in international and transit traffic in the field of conventional and intermodal transportation, as well as transportation of dangerous goods.

Considering the environmental and energy efficiency of rail transportation, we expect a doubling of the intermodal transportation until 2010.

- **Scenario 1 - Reference**: even increase in intermodal transportation on all relations
- **Scenario 2 - Zone**: increase of intermodal transportation on Alpine and Pyrenean corridors
- **Scenario 3 - Global**: increase of intermodal transportation in the East-West direction
Conditions for the Growth of Intermodal Business of SŽ

- Supporting all technical, operational and commercial solutions increasing the market attractiveness and the utilization of the intermodal trains in Slovenia

- Supporting infrastructural improvements, allowing the use of longer trains and reducing the capacity congestion

- Defining equal and right framework conditions for all transport carriers and modes taking in the consideration the external costs

- Defining fiscal and other measures to stimulate intermodal transportation and to shift the transport system into the direction of modern and economically efficient supply chain solutions.

- Development of intermodal terminals and services
Igor Hribar

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Freight Transport

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Fax: +386 1 29 14 838
igor.hribar@slo-zeleznice.si

Thank you for your attention.
Intermodality and future challenges
Content

- Port services
- Maritime and hinterland Connections
- Opportunities and development plans
Port services
49 years of growth

Throughput in tons

15,000,000
13,000,000
11,000,000
9,000,000
7,000,000
5,000,000
3,000,000
1,000,000

1955
1971
2005


1979 – Container terminal

1984 – Dry bulk terminal

1988 – Grain silo

1990 – Alumina terminal

1996 – Car terminal

1999 – Parking warehouse

2002 – Investments in Pier II

2004 – Environmental investments on EET

2005 – New container crane
- Total Free zone area: 2,549,000 m²
- Closed warehouses: 221,600 m²
- Roofed warehouses: 73,400 m²
- Open storage areas: 945,000 m²
- Shore tanks: 50,000 m³
- Silo (unique capacity): 81,000 tons
- Quay length: 3.134 m
- Railway tracks: 30 km
- Berths: 26
- Maximum sea depth: -18 m
Luka Koper as a company

Company foundation: **1957**

**700** regular employees (+ 300 employees in daughter companies)

Turnover 2005: **13 mio tons**

Operating revenues 2005: **85 mio EUR**

Status: **Public Limited Company** – shares quoted on Ljubljana Stock Exchange

**Main Activities:**

- Terminal operations
- Complete logistic support
- Management of the port area
- Management of the Free Zone
All-purpose port

- Containers
- General cargo
- Vehicles
- Fruit & Vegetables
- Livestock
- Dry Bulk
- Liquid Bulk
Terminal services

- Ship loading / unloading
- Wagons und trucks loading / unloading
- Warehousing
- Logistics
- Additional services
Market and cargo mastering 2005

Total turnover 13 mio tons:
- Slovenia 3,86 mio ton (29.5%)
- Transit 9,20 mio ton (70.5%)
Maritime and hinterland connections
The role of Koper’s Port in the region

**BASIC FACT:** Geographic position at the intersection of:
- Corridor V and X (land side)
- Adriatic Corridor (sea side)

**CONSEQUENCES:**
- The only port in Slovenia => strategic national role: attraction of cargo on Slovenian transport route + integrator of logistic activities at the sea / land cross-point
- Crucial generator of revenues and growth of Slovenian transportation business + multiplication effects on other (domestic and foreign) sectors
- Above average added value activity => 1 worker in our maritime sector creates nearly double added value than an average worker in our Costal region
- Important also for hinterland markets (in further economic expansion)
Inland connections

Efficient ROAD infrastructure:
- direct Motorway access till the port area – new entry avoiding the city traffic
- Connection with the European Network

Highly depending on RAILWAY:
- 60 % of total throughput is using Railway (EU25 average is 18%)
- 50 % of container traffic is using Railway
- Short term project: modernization of some shunting stations (+ 30% of railway capacity)
- Long term project: New double-rail-track Koper – Divača
## Regular trains

<table>
<thead>
<tr>
<th>Region</th>
<th>Destinations</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>SLOVENIA:</td>
<td>KP - LJ - MB (Adria Kombi)</td>
<td>daily block train</td>
</tr>
<tr>
<td></td>
<td>KP – LJ (Adria Kombi)</td>
<td>daily shuttle train</td>
</tr>
<tr>
<td>HUNGARY:</td>
<td>Budapest (ICF)</td>
<td>6 block trains / week</td>
</tr>
<tr>
<td></td>
<td>Budapest (ERS-Maersk)</td>
<td>1-3 train / week</td>
</tr>
<tr>
<td></td>
<td>Budapest (Adria Kombi)</td>
<td>3 trains / week</td>
</tr>
<tr>
<td></td>
<td>Budapest (Metrans)</td>
<td>1-2 trains / week</td>
</tr>
<tr>
<td>AUSTRIA:</td>
<td>Graz (ICA Interliner)</td>
<td>weekly block train</td>
</tr>
<tr>
<td>SLOVAKIA:</td>
<td>Žilina (Glovis /Adria Kombi, ZSSK Cargo)</td>
<td>daily block train</td>
</tr>
<tr>
<td></td>
<td><strong>from end 2006</strong></td>
<td></td>
</tr>
<tr>
<td>CROATIA, SČG:</td>
<td>Beograd (Adria Kombi)</td>
<td>3 trains / week (from LJ)</td>
</tr>
<tr>
<td>ITALY:</td>
<td>Verona (QE)</td>
<td>2 shuttle trains / week (from LJ)</td>
</tr>
<tr>
<td>GERMANY, BENELUX</td>
<td>München (Adria Kombi)</td>
<td>daily block train (from LJ)</td>
</tr>
</tbody>
</table>

All other destinations are covered with daily single wagon service.
### Container shipping lines services

- **Far East**: EMC–LT–CMA
- **Mediterranean**: Grimaldi
- **Piraeus**: MSC
- **Gioia Tauro**: MCL
- **Gioia Tauro**: Lošinjska plovidba
- **Gioia Tauro**: X-Press
- **Malta**: UFS
- **Malta**: IRISL
- **Egypt**: ECL
- **Napoli**: COSCO
- **Levant**: Sermar Lines

*In total more than 30 carriers are “selling” Koper*
Important projects for our future business development:

- Looking for feasible routes / partners (promotion)
- Involvement of complex port logistics and adequate infrastructure, depending on: new port investments, new regulation of port traffic, high integration with other suppliers, IT support etc.

Some attempts with Marco Polo:

- block train Graz-Vienna-Bratislava (2004) - rejected
- connection with Barcelona (2005) – awaiting results
- new ideas for 2006!!!
Opportunities and development plans
Vision and development orientations

Vision: Luka Koper leading port and logistic system for Central Europe

- **Complete logistic support** (service integration with other providers) for a more competitive transport route via Koper
- **Distribution center** and value added activities
- **New terminals** on other locations
Future throughput estimation

Main infrastructure conditions:
- new double rail-track till Koper
- Pier III for 1 mio TEU (multimodal terminal)
Market potential in TEUs

<table>
<thead>
<tr>
<th>Country</th>
<th>Volume</th>
</tr>
</thead>
<tbody>
<tr>
<td>Slovenia</td>
<td>90.000</td>
</tr>
<tr>
<td>Hungary</td>
<td>150.000</td>
</tr>
<tr>
<td>Austria</td>
<td>400.000</td>
</tr>
<tr>
<td>North Italy</td>
<td>300.000</td>
</tr>
<tr>
<td>Bavaria</td>
<td>300.000</td>
</tr>
<tr>
<td>Croatia</td>
<td>30.000</td>
</tr>
<tr>
<td>SČG &amp; Bosnia</td>
<td>30.000</td>
</tr>
<tr>
<td>Czech Rep. &amp; Slovakia</td>
<td>300.000</td>
</tr>
</tbody>
</table>

**TOTAL** 1,600,000
Spatial development projects

- Passenger terminal
- Extension of Piers
- Pier III
- Distribution Center
- New Port Entry
- Shunting station Expansion
Current view of cargo groups allocation

Port Entry
Future Projects

Containers
Cars
General Cargo
Bulk
Other complementing activities / distribution

New Port Entry
Thank you!
Project SINGER

SINGER Project team

presented by Mr. Janez Merlak
Commitment of the partners

- Cemat, Italy
- Hungaria Intermodal, Hungary
- Kombiverkehr, Germany
- Slovenske železnice, Slovenia
- UIRR, Belgium
- Adria kombi, Slovenia
SINGER features

- Intermodal Shuttle and Block-train lines
- Reliable, efficient and competitive service
- Know-how in Combined transport business

Connection of the regional hubs:
- München Riem Ubf
- Verona Quarante Europa
- Budapest BILK
- Ljubljana KT
- Port of Koper CT
Slovenian INtermodal Gateway to European Rail

Gateway concept

Danmark
Belgium
Netherlands
Germany

Port of Koper
Slovakia

Austria

Hungary

Port of Rijeka

Budapest

Munich

Verona

Port of Triest

Ljubljana

Port of Koper

Port of Rijeka

Zagreb

Croatia

Serbia&Montenegro

Belgrade

Turkey

Macedonia

Greece

Bosnia&Herzegovina

Slovenske železnice

CEMAT

kombi verkehr

ADRIA KOMBI

EU
Slovenian INtermodal Gateway to European Rail

North - South

[Map of European rail connections with cities such as Bremerhaven, Cologne, Ludwigshafen, Koper, Ljubljana, Osijek, Zagreb, Zadar, etc.]
### Volumes achieved on SINGER lines in 8 months (in 1000 tkm)

<table>
<thead>
<tr>
<th>Line</th>
<th>Dist. km</th>
<th>All years 1000 tkm Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ljubljana - Verona</td>
<td>346</td>
<td>0</td>
</tr>
<tr>
<td>Ljubljana - Budapest</td>
<td>537</td>
<td>19601</td>
</tr>
<tr>
<td>Ljubljana - München</td>
<td>427</td>
<td>28127</td>
</tr>
<tr>
<td>Ljubljana - Koper</td>
<td>152</td>
<td>5334</td>
</tr>
<tr>
<td>Verona - South Italy</td>
<td>716</td>
<td>0</td>
</tr>
<tr>
<td>Budapest - North/East Hungary</td>
<td>226</td>
<td>3656</td>
</tr>
<tr>
<td>München - North/West Germany</td>
<td>500</td>
<td>23430</td>
</tr>
<tr>
<td>Ljubljana - Zagreb, Belgrade, Istanbul</td>
<td>113</td>
<td>4013</td>
</tr>
<tr>
<td>Budapest - Romania</td>
<td>321</td>
<td>0</td>
</tr>
<tr>
<td><strong>All lines</strong></td>
<td><strong>Total</strong></td>
<td><strong>84161</strong></td>
</tr>
</tbody>
</table>
Reliable Service

- Shuttle and block train lines with fixed time-tables
- Service that brings the cargo from one part of Europe to the other without changing of the transport mode in acceptable time
Efficient Service

• The partners provide together a smooth operation and administration that is user friendly.
• The lines that are interconnected in Ljubljana KT are programmed in the manner that no time is lost by transshipments from one train to another.
• All trains are linked to the regional networks (Nodo Italia, Kombinetz 2000, Hungarian antennas, Adria kombi Network).
• The transport data is transferred electronically between partners to ensure the information on-time.
Competitive Service

• Combined transport service that is competitive to road transportation:
  • Traction prices
  • Frequency
  • Availability and capacity
  • Transit-time

• One-stop-shop for the clients
• Same procedures at all CT Terminals
Project SINGER

EC supports the idea. We are going to prove they made a right decision.

Project partners
Project SINGER

Thank you for your attention.
Press Conference