UIRR Report

EUROPEAN ROAD-RAIL COMBINED TRANSPORT

2014-15

UIRR
INTERNATIONAL UNION
FOR ROAD-RAIL
COMBINED TRANSPORT

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INTERNATIONAL UNION FOR ROAD-RAIL COMBINED TRANSPORT

UIRR is an industry association which

Promotes the public understanding and appreciation of Road-Rail Combined Transport,
Enhances the development and the proliferation of industry best practice,
Supports the daily operation of European Combined Transport through different services.

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IMPRESSUM

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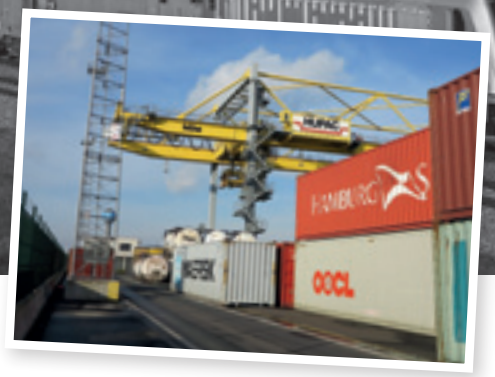
Key figures
of Combined Transport



92%

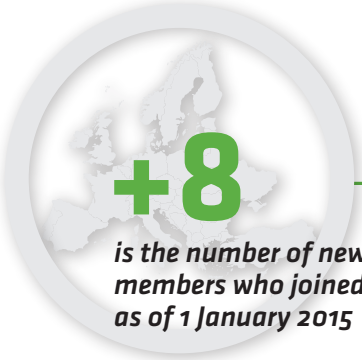
the number of loading units bearing the ILU- or BIC-Code at the end of 2014

Following the adoption of the EN13044 standard, which created the ILU-Code as the owner identifier of European Intermodal Loading Units, the CT sector stakeholders agreed an implementation deadline of 1 July 2014. By this date, all loading units taking part in unaccompanied CT should have been marked either with a BIC- or an ILU-Code.

The Belgian government provided a funding programme to aid CT transhipment in compensation for the recognised regulatory imbalance that benefits road hauliers when it comes to paying for the use of the road network. This compensation materially contributed to the emergence of an elaborate domestic CT network in Belgium peaking at 400,000 consignments a year in 2011. The programme was prematurely axed in 2014, while the promised distance-based tolling for trucks was not introduced, resulting in substantial losses for the CT sector.

3 of 4

are the CT consignments lost on domestic Belgian relations over the past years



+8

is the number of new members who joined UIRR as of 1 January 2015

Having completed the restructuring of UIRR in 2014, which included the adoption of a revised vision and mission, as well as an amendment of the Statutes, 8 new members have been inaugurated into the association. These were the first new members joining since 2006.

2014: unevenly apportioned and inconclusive performance

The past year – in a nutshell – brought a mixed performance for European Road-Rail Combined Transport as the output of UIRR operators contracted by 1.1% in terms of consignments, while it grew by 12.2% in tonne-kilometres. This result comprises a near 13% growth of accompanied CT, also known as RoLa, a significant reduction of domestic CT relations in some countries, coupled with robust development of cross-border traffic that also includes intercontinental CT. The average distance travelled by a CT consignment evolved to 780km in 2014, which constitutes an 8% increase when compared with a year earlier. The tonne-kilometre growth not including the intercontinental relations was 5% in 2014.

The return of growth to the European economy has been distributed in a geographically uneven manner with some important countries for Combined Transport growing less dynamically. The oil price collapse, one of the major forces fuelling this expansion, placed CT margins under pressure as rail traction energy prices did not decline commensurately. On the other hand the ongoing fiscal consolidation resulted in changes to vital state funding programmes of a compensatory nature to CT in several Member States, for which the conditions were not ripe, ultimately resulting in a loss of traffic on shorter distance domestic relations.

The State of Affairs

FROM THE CHAIRMAN AND THE DIRECTOR GENERAL

European Road-Rail Combined Transport (CT) delivered a mixed performance in 2014: as the traffic of UIRR operators contracted by 1.1% in terms of consignments, it grew by 12.2% when expressed in tonne-kilometres. The transformation of UIRR, the sector's industry association, has progressed well with the adoption of a revised vision and mission, which was rewarded by the confidence embodied in the joining of 8 new members.

CT performance

The European Combined Transport sector, and its actors represented by UIRR, similarly to the European economy, delivered an unevenly apportioned and inconclusive performance in 2014. Total turnover lacked the overall economic growth when counted in number of consignments, while considerably outperformed it when expressed in tonne-kilometres.

Longer distance (cross-border) relations fared comparatively better, especially if including intercontinental routes, as compared to short distance (domestic) traffic. Subsequently, the average distance covered by a CT consignment grew to 780km.

Combined Transport will only be able to live up to its full potential, and deliver the modal shift expected of it by European transport policy-makers as well as the general public, if the regulatory conditions which presently do not fully support fair competition - either between the different modes of transport, or on rail - are corrected by the legislator. Until then Member States should either retain existing funding schemes designed to compensate these disadvantages towards the CT sector, or establish such programmes.

Transport, from its infrastructure to all aspects of operations, in general should be de-politicised leaving only a regulatory framework in place that serves standardisation, safety and internalisation of external costs as well as homogeneity of practice.

Developments to the Regulatory Framework

2014 brought very little progress, but all the more concerns as to where the European regulatory framework of Combined Transport is heading. The only major legislation resolved was the revision of Directive 96/53 on the weights and dimensions of commercial road vehicles. The new Directive is not without its flaws, yet the revision in general may still be considered to have improved the situation. The new Shift²Rail Programme was also resolved, which promises €1 billion in railway-related R&D.

On the other hand, little has been accomplished when it comes to fair competition on rail (the Fourth Railway Package), or the implementation of the user pays principle (revision of the Eurovignette Directive, which in the end has not even been tabled by the outgoing Barroso Commission).

The only progress concerning the polluter pays principle is the adoption of the implementing act on noise differentiated track access charging, which affects rail. The proposed revision of the Fuel Excise Duty Directive (2003/96) has been withdrawn by the new Juncker Commission.

The much awaited revision of Directive 92/106 on Combined Transport, which is seen as vital to facilitate the harmonisation of the highly divergent national regulatory frameworks in place across the EU, has also suffered a delay as, in the spirit of "Good Regulation", the new Commission reneged it onto a REFIT (Regulatory Fitness) procedure.

Overall, the European Combined Transport sector can not be satisfied with the progress to the development of its regulatory framework in 2014.

Achievements in 2014

UIRR was very actively participating in advising the legislators, who debated the revision of Directive 96/53, which was indispensable to achieve the several progressive components of the new Directive from the perspective of Combined Transport.

Two projects co-financed by the EU were also brought to success with UIRR's active participation: EcoHubs, which developed a toolbox for improving the efficiency and environmental performance of CT terminals, and DESTINY that

"Overall, the European Combined Transport sector can not be satisfied with the progress to the development of its regulatory framework in 2014."

Ralf-Charley Schultze, Director General

Robert Breuhahn, Chairman

targeted to catalyse the proliferation of standards and best practices in the marking and codification of loading units, as well as the handling of dangerous goods and load securing in Combined Transport.

Proliferation of the ILU-Code, administered by UIRR, has advanced hugely as 92% of consignments were found to be identifiable by the ILU- or the BIC-Code at the end of 2014. This good result should open up new possibilities in the development of productivity-enhancing IT solutions in Combined Transport.

Development of the Association

In 2014 UIRR members revised the association's strategic vision and refined its mission objectives, whereby it strives to

- achieve a regulatory framework that enables fair competition on the basis of technical merit and management excellence, and to
- work to increase the market for Combined Transport.

These aims should be delivered through the

- Promotion of Combined Transport,
- Enhancement of its functioning, and
- Support of its daily operations.

Finally, alongside CT Operators, the possibility of UIRR membership has been opened up towards CT Terminals.

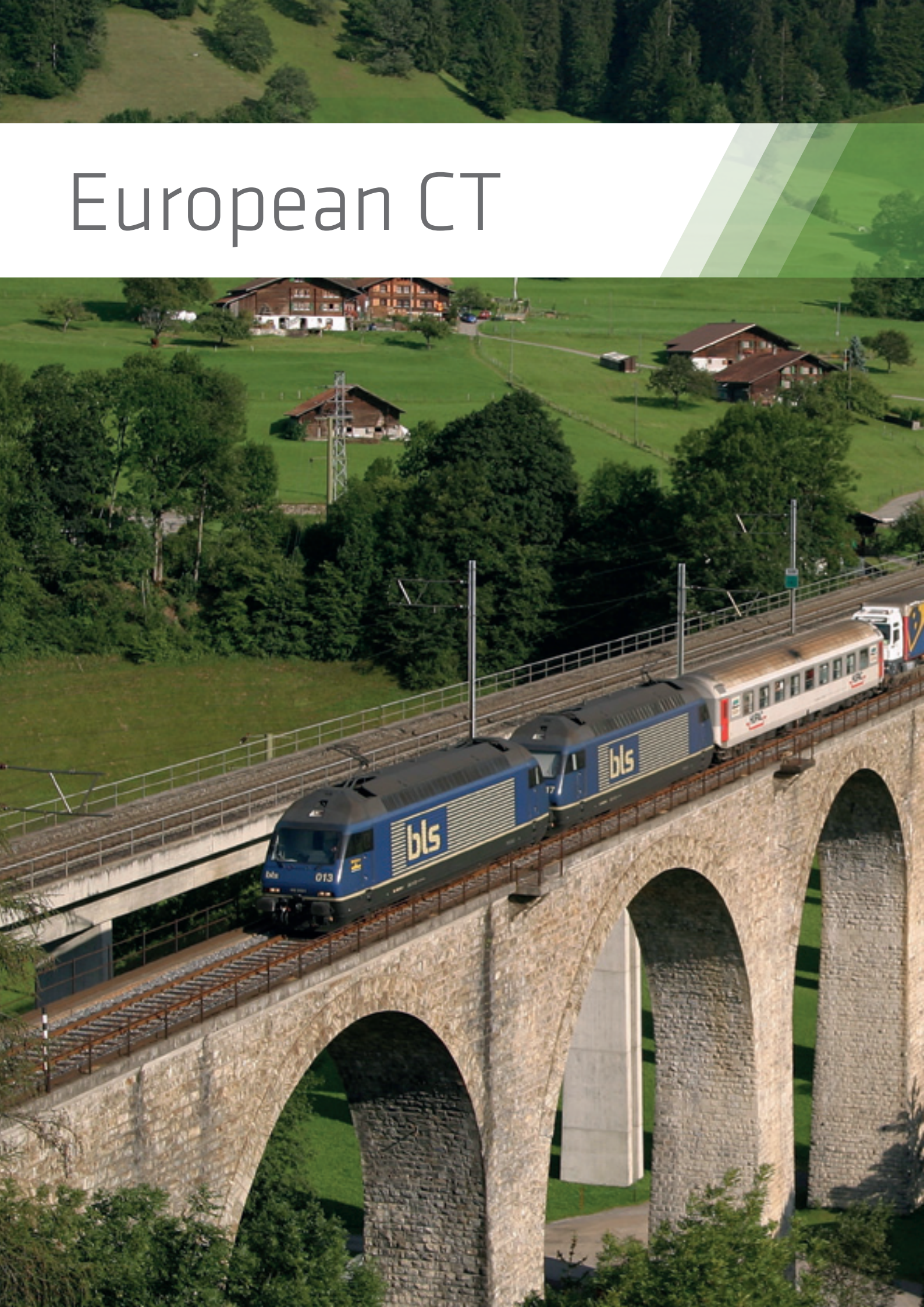
8 new members have been inaugurated into the association as of 1 January 2015: 3 CT Operators (CFL Intermodal, FELB, TEL) and 5 CT Terminals (CTE, Combinant, EMT, Russell, Lugo).

Outlook and expectations

The UIRR Combined Transport Sentiment Index stands at "neutral" for the 12 month-period starting 1 April 2015. This reflects the uncertainties that linger around European economic growth and the regulatory environment of Combined Transport.

UIRR, as the industry association of European CT, will continue to professionally argue for the policy measures and the changes in the regulatory framework deemed necessary to deliver the modal shift objectives of the Transport White Paper. These are indispensable to ensure that European long(er) distance freight transport reverts to a sustainable path of development, and thereby contributes to the competitiveness of the economy, while making Europe a better place to live.

European CT



The Product
The Business Year
Issues

European Combined Transport (CT) operations developed in an uneven manner over the course of 2014: the traffic performance of accompanied CT (Rolling Motorway) services - operated by UIRR members - grew by 13% as compared to a year earlier. Intercontinental unaccompanied CT, using the Trans-Siberian route as well as the Southern route through Kazakhstan, developed rather dynamically - though from a relatively lower base. Domestic unaccompanied CT declined, and EU border crossing stagnated - both for different reasons. The overall performance output of UIRR's CT Operators averaged a slight decline in number of consignments (-1.1%), while advanced by about 5% when expressed in tonne-kilometres.

Road-Rail Combined Transport operations may be divided into two major categories: unaccompanied and accompanied CT.

Unaccompanied Combined Transport

Unaccompanied CT is the forwarding of intermodal loading units (containers, swap bodies and semi-trailers) that are transhipped between the various transport modes (trains, barges, seafaring vessels and trucks) either using gantry cranes or reach stackers in what is known the vertical method, or through a series of different, less well proliferated horizontal techniques (Modalohr, Cargo Beamer, Rail Runner, Innovatrain, Box Tango, etc.).

The place for transhipment is called a CT Terminal, which can provide connections between any number of transport modes; most of the time Road-Rail, but not infrequently including inland waterways and sometimes seafaring vessels as well. (More on CT Terminals, a separate member category of UIRR from CT Operators, can be found on pages 10-13.)

The economic and ecological attributes of so-called sustainable modes of transport - electric rail, inland waterways and short sea shipping - more than justify the increased complexity that comes with the transhipment needed to combine these transport modes. The longer distance transport-chains of intermodal freight transport offer exceptional properties when it comes to energy efficiency, low emission of pollutants, very low greenhouse gas emissions and land use coupled with exceptional safety and security.

Accompanied Combined Transport

Accompanied CT, or Rolling Motorway, is a system of transport where the complete truck together with its driver is transferred to a train, as a kind of rail ferry, to facilitate the efficient crossing of geographical obstacles, such as the Alps or the English Channel. The system is based on the very efficient land use of rail transport, which lends itself well - through tunnelling - to the task at hand.

The three types of Rolling Motorway services found in Europe today are:

- Rolling Motorways provided using the RoLa wagon design of Talbot operated on several Trans Alpine routes,
- The Lorry Rail connection between Turin (Orbassano) - Lyon (Aiton), and
- The Channel Tunnel shuttles of Europorte.

Efficient electric traction and the attractive average speed of rail travel complement the positive traits of accompanied CT. This specialised form of Combined Transport makes up about 6% of the output performance of UIRR Operators.

Developments in 2014

- **Solid performance of Rolling Motorway services:** 13% year-on-year growth on the back of no major infrastructure disturbance and a solid financial background attributable to reliable financing programmes (designed to compensate for the regulatory imbalance favouring road haulage).

  The outlook, however, is more sobering: no new train paths for RoLa trains and no added capacity through extended train length in the Alps until major infrastructure projects are completed in 2020. Since utilisation of existing capacities is on a very high level, only smaller growth is expected for the years to come.

- **Dynamic expansion of intercontinental CT** due to three factors: (i) increasing reliability and average speed of the trains, (ii) increased economic activity in Western regions of China coupled by aggressive infrastructure construction and attractive subsidies for start-up services, and (iii) the relatively smaller quantity of goods moved on a single train complies better with the just-in-time needs of the market and consignors.

  Considering the planned additional infrastructure investments, the foreseeable technology improvements and the increased quantity of cargo to be shipped from Europe towards Asia, the future of intercontinental relations remains bright.

- **Emergence of *company trains*** is a reason why the statistics of cross-border unaccompanied CT performance indicated stagnation for UIRR members.

  As a single shipper reaches adequate quantities moved via CT (s)he frequently decides to launch a complete company train on an own account, instead of just buying slots on a CT train operated by a professional CT Operator. UIRR's operator members are responding to this trend by setting up their own company train units to continue serving their customers.

  Unaccompanied Combined Transport remained competitive on the longer cross-border relations, especially if the trains run along European rail freight corridors, where the so-called "corridor trains" enjoy a priority over other traffic.

- **Domestic, or shorter haul CT, contracted** mainly in a handful of countries, like Belgium, where the incompetent phasing out of a national funding scheme destroyed a well developed gateway network reducing it from over 400,000 consignments to under 100,000 in a few years. The support scheme was aimed to compensate for the regulatory imbalance that advantages road haulage through inadequate tolling. The new distance based tolling scheme was not introduced, but the funding was nevertheless cut. Similar reasons coupled with a weaker economic recovery led to a decline in domestic unaccompanied CT traffic in Italy.

  In case cleverly designed government funding is offered to CT, which is able to (temporarily) compensate for the regulatory disadvantages that it suffers then France's Naviland Cargo is the good example of what the sector is capable of (for details see the Member's Comment below).

Member's Comment

CHARLES PUECH D'ALLISAC
Chairman & CEO
Naviland Cargo

In spite of the relatively low economic growth rate of France, the core market of Naviland Cargo, the performance of the company increased in 2014 in terms of consignments (+11%), tonne-kilometres (+7%) and sales turnover (+6.2%). Road haulage was aided by the French government's termination of the "éco-taxe", while the sharp decrease of the price of diesel reinforced the competitiveness of trucking. Combined Transport received some compensation through a three-year government programme that promises €10 million a year to the sector in France during the 2014-16 period, however this is not even sufficient to offset all the rail-related cost increases that CT had to face in the same time.

Nevertheless, Naviland Cargo implemented the following 7 measures to develop its competitiveness, which led to the positive result with regards to the gaining of market share:

1. Intensive sales efforts to better understand customer needs enabled the development of volumes and the identification of new relations - several of which were launched in 2014.
2. The creation of new cross-border products like Rotterdam-Lyon, Antwerp-Dijon and Zeebrugge-Dijon, the latter together with strategic partner and client, ECS. New or intensified domestic connections to Le Havre, Marseille and Fos.
3. Improved strategic planning and foresight.
4. Enhancement of internal processes to boost operational responsiveness and adaptation of technical means.
5. Offering a link to global solutions for customers in outbound traffic, and a better adaptation of technical means to specifics of Road-Rail CT on other (inbound) relations.
6. Intensified customer service efforts at the 8 CT terminals managed by Naviland Cargo.
7. Strengthened relations with key industrial organisations.

"Unaccompanied Combined Transport remained competitive on the longer cross-border relations, especially if the trains run along European rail freight corridors, where the so-called "corridor trains" enjoy a priority over other traffic."

Interesting facts of CT Operations

The busiest CT relation of Europe continues to be the axis between the Northern ports (Antwerp-Rotterdam- Hamburg) and Northern Italy also called Rail Freight Corridor 1, or the *"Rhine-Alpine Corridor"*. Traffic of UIRR Operators along this corridor expanded considerably in 2014. The ambitious infrastructure developments already decided along the route promise continued expansion in the years to come.

The most dynamically developing UIRR relations in Europe during the past year were Eastward connections from Germany and Belgium to the Czech Republic, Hungary, Romania and Turkey, connections between countries in the East (Hungary-Croatia, Austria-Slovenia, Czech Republic-Italy) and the link between Germany and Spain.

Increased traffic along the route from Germany to Russia (crossing Poland) is attributable to the well expanding Europe-Asia CT services.

Initiatives of UIRR Operators

UIRR's operator members undertake significant efforts to meet the demands of the market and that of shippers.

- Actively seeking out new customers and collaborating with them to jointly develop new products.
- Enhancing quoting and booking systems to increase the speed and efficiency of selling slots on the trains
- Continuously searching for the right train paths and the best traction service providers that are needed to offer a comprehensive network, capable of offering a transport solution to every possible client, especially newcomers to CT.
- Optimising the timetable to maximise wagon throughput, and investments into expanding wagon capacities.

Regulatory changes needed

Politics and politicians exert significant influence over transport through the public ownership of transport infrastructure and - in the case of rail - large and influential (so-called "incumbent") operators. Moreover, politicians oversee spatial planning and regulate the environment by either forcing polluters to pay, or deciding to tolerate such behaviour (at the expense of the greater public).

Consequently, sectors like Combined Transport have no other choice, but to ask for the intervention of politicians if they notice significant and artificially created imbalances in their operating environment.

Users should be required to pay the fair cost of accessing any public transport infrastructure, in all modes and in every case, in proportion to the time they occupy the infrastructure, the distance they cover on it and the wear and tear they cause. This is the general practice already on rail, but in several Member States the similar burden is alleviated from the shoulders of the road competition.

Excessive land users and polluters of the environment should also be made to stand good for the related costs: noise, pollutant and greenhouse gas emissions, as well as landscape and biodiversity destruction.

Finally, the safety provided by each mode of transport must also be elevated to the same levels. The loss of life and health in any regular economic activity, transport included, should not be tolerated and even portrayed as "normal" towards society.

Subsequently, UIRR's CT Operators expect that politicians of the European Union and its Member States take immediate action to implement fairly and evenly across the various modes of transport:

- **the user pays principle**, when it comes to accessing the publicly owned transport infrastructure, including the application of value charging to reflect infrastructure scarcity,
- **the polluter pays principle** motivating every economic sector to minimise its environmental footprint with market-conform means, as well as to stand good for the costs of any adverse effect its activity bears upon society, and
- **an equal expectation of safety** in a mode neutral manner, and reflecting the full material liability of the operators of each technology if and when resulting in the loss of life or deterioration of health.

Combined Transport will only be able to fairly compete within the freight transport sector if and when changes in this spirit are enacted by the relevant policymakers.

CT Terminals

The Product
The Business Year
Issues

European Combined Transport (CT) terminals are the interface connecting the various modes of transport, which perform CT transport-chains. 39 CT terminals were managed by UIRR members in 2014, 30% more than a year earlier, while the UIRR Terminal Database contains over 350 CT terminals. Any one of the nearly 24 million ISO containers, which are used in intercontinental transport, and the 630,000 European loading units, that serve the continent, may turn up at these terminals for transhipment between a truck and a train, a barge or a short sea navigation vessel.

The Situation of Terminals

Several entities may own CT Terminals, including rail infrastructure managers, CT Operators, port authorities, dedicated terminal management companies, and logistics service providers. While terminal development may also be financed by public resources, private capital is also often used. The diverse ownership and financing background makes terminals a unique category of transport infrastructure.

Terminals may be managed by a similarly diverse range of entities as those owning them, including state or municipally owned entities, dedicated terminal managing companies, CT Operators or logistics service providers. A concession for the management of publicly owned terminals may occasionally be tendered out to the private sector.

In case public funding is used when developing a terminal, irrespective of the ownership of the entity that owns or manages it, the terminal must provide "open access" to its facilities. It should be noted here that the meaning of "open access" is not regulated anywhere in EU law.

CT Terminals serve as a gateway for freight towards the various modes of transport, which makes them an important enabler of economic activities of a particular region or area. This explains the interest of local governments in the development of terminals.

Alternatively, shippers and other economic actors may also be motivated to establish a terminal, especially in case if none is available in a locality where they operate. Terminals are sometimes developed in areas that are favourably situated to the core infrastructures of the modes intended to be connected, even if there is no significant economic activity in the immediate vicinity. In these cases, terminals may also act as the engines of economic growth.

Regulatory Framework of Terminals

Transhipment terminals are not regulated in most Member States of the European Union in spite of their strategic role and perhaps reflecting the diversity of their ownership background, scope of activities and management.

The European legislator has also not discovered them until the Rail Freight Corridor Regulation (913/2010) adopted a few years ago. The European Union further recognised transhipment terminals within the revised TEN-T Guidelines and the Connecting European Facility (Transport) passed in late 2013. Unfortunately, neither of these EU legislations aim to provide a harmonised regulatory framework for CT terminals.

The lack of a European definition for "open access terminal" - ideally contained in legislation, as well as the conditions that they must fulfil, creates an uncertain situation as today each Member State may, or may not, set different requirements. Subsequently, CT stakeholders must "learn" the conditions from terminal to terminal and from country to country.

While this largely unregulated environment has probably contributed to the development of transhipment terminals in the past, the dynamically expanding cross-border CT operations (the clients of terminals) express an increasingly pressing need for a harmonised legal framework. The differences in the conditions of accessing terminals are emerging as an obstacle to devising new CT connections.

UIRR terminals have agreed a strategy to address this situation: UIRR will initiate with the EU Commission the development of a regulatory framework for transhipment terminals (in the recast Directive 92/106), while the Terminal Interest Group of the association will engage in the development of General Terms and Conditions for European CT Terminals.

The CT Terminal Product

The essential service of a CT Terminal is the facilitation of transhipment from one mode to another, or in case of gateway terminals from one train to another. The process begins with the arrival of the loading units at the terminal (check-in). Then the consignment is offloaded and either directly transferred to its new carrier or placed on the tarmac to await transfer to the outbound transport service. Terminals carry out an inspection of the accompanying documentation and the loading unit itself is also checked for physical damages and the proper labelling. The loading plan of trains is also done by the terminals, as well as the trucks exiting with outbound cargo may also be controlled for weight. The client of the terminal for this service is the operator of the CT service, who often has an agent present on the terminal.

Terminals frequently offer a range of complementary services, such as customs agency, storage, loading unit and wagon inspection, cleaning and repair, stuffing and unstuffing, storage of goods and final mile road haulage.

CT Terminals have to be safe and secure facilities. They are typically fenced, well lit and monitored by cameras and occasionally by live force. Terminals must also be ready to handle and safely store loading units containing dangerous goods cargo.

Active contribution to the efficient organisation of last mile transport, whether by rail or by truck, is an important activity. Both require direct contact with third parties such as road hauliers and rail traction service providers. Some terminals possess their own shunting capacities to cover the distance between the nearest railway station (entry point to the mainline) and the terminal premises.

Terminals must develop sophisticated IT systems to aid their work. These systems need to be able to receive bookings and arrival notices from incoming transport operators of any mode, as well as to send messages to both CT Operators and last mile carriers.

CT terminal managers must also make sure, for the sake of risk management and also to better serve the local economy, to offer a wide range of different long distance connections, especially in case they are the sole CT gateway for a larger area or region.

Member's Comment

BEN BEIRNAERT
CEO,
Combinant Terminal

The traffic volume at the Combinant Terminal increased by 19% to nearly 120,000 units in 2014 as compared to a year earlier. This could be attributed to an increased frequency and better capacity utilisation on the trains that the terminal handles, since no new relations were added last year. While Combinant is located in the Antwerp Port area, nearly 90% of its turnover is made up of continental traffic; that is long distance border crossing CT trains.

The biggest challenge of Combinant is living up to the ever shorter asset turnover expectations of both the CT operators served by the terminal and the road hauliers performing the first- or last-mile connections. This is especially problematic when a train is late upon arrival, which puts pressure on the terminal to turn it around in a shorter than planned amount of time so that the same train is ready to leave on time.

The optimisation of asset utilisation is an aim of the terminal manager as well. Subsequently, Combinant is developing an IT solution that reduces the waiting time for trucks, while simultaneously enabling the optimisation of crane capacities.

An extra storage area has been recently opened at the terminal to enable the pre-loading of containers onto chassis making possible even quicker collection. The servicing of containers, such as cleaning and the removal/installation of interior lining, as well as the storage of empty containers was also made possible.

"The biggest challenge is living up to the ever shorter asset turnover expectations of both the CT Operators served by the terminal and the road hauliers performing the first- or last-mile connections."

Improvement of Terminal Operations

CT Terminals are similar in many aspects to airports: they frequently have to deal directly with the customers and the subcontractors of their customers. Moreover, quite often the improvement of a terminal's overall performance and efficiency requires measures that affect these relations. Subsequently, advanced diplomatic sensitivity from terminals is indispensable.

- **Digitalisation** covers every type of paperless solution and IT system that terminals may implement in order to improve the overall effectiveness of their operations like booking, check-in/check-out, train load-planning, organising traffic on the premises, relationship with and organising of last mile connections, or terminal slot allocation.
- **Greening and energy efficiency** improvement of terminals are important as terminals form a pivotal role within CT transport-chains, which are the ecologically and economically sustainable alternatives to long(er) distance road haulage. Optimisations, transparency and accountability with regards to the carbon footprint, energy efficiency and ultimate environmental performance of terminals are therefore essential.
- **Ensuring the diversity of connections** is the mission of a terminal vis-à-vis the area, region and its population and economic actors whom they serve. Subsequently terminals aim to understand the demand of their vicinity, and then proactively search for CT Operators and shippers with a desire to ensure that the required connections are offered from their facility.

The overall efficiency and performance of CT Terminals diverges to quite an extent depending on their geographic location, mostly depending on whether they are based in an EU15 or an EU13 country, and if they operate in a country with a long history of Combined Transport, or one just learning this trade.

Outside Support to Terminals

CT Terminals are critical infrastructure, they are the gateways to enabling the Combined Transport alternative to long(er) distance trucking for relatively smaller quantity of cargo. Terminals are complex operations, and their establishment requires significant preparations and investment. Nevertheless, CT Terminals are managed by relatively small companies with a comparably small staff, who on the other hand must master a wide range of competences and technologies.

Subsequently, terminals need to obtain outside advice and support, which may be most efficiently acquired through interaction with one another in their industry association or professional groups, as well as could be acquired from outside consultants. Statistics can efficiently be collected and benchmarking feed-back provided through an industry association, such as UIRR. This platform can act as the credible not-for-profit provider of support services like a wagon or loading unit register, General Terms and Conditions for European CT terminals, or link to tracking and tracing and train position information.

The regulator can also assist efficient terminal operations, for instance by enacting the liability of shippers and consignors for the accuracy of gross weight data indicated in the shipping documents that accompany an intermodal consignment, or by collaborating with terminals locally to better organise the road and rail approaches of the facility.

EU member states bear a special responsibility for creating the right environment for the proliferation and prospering of Combined Transport on their territories, which in every case begins and ends at a CT terminal.

Business
Environment & Outlook

Regulatory environment
Sector Innovation
Future expectations

The business environment of Road-Rail Combined Transport - as embodied by the European regulatory framework - has four major dimensions to address: (i) establishing fair competition in and de-politicisation of the European railway sector; (ii) equalising the playing-field between the various modes of transport; (iii) ensuring that a competitively managed and adequate transport infrastructure is available; and (iv) contributing to the best practice and the ultimate proliferation of Combined Transport, a most productive means of making longer distance freight transport in Europe sustainable.

European Parliament

The outgoing European Parliament made a tremendous effort and adopted first reading positions on every major piece of legislation on its table concerning transport: the Fourth Railway Package - both its Technical and Political pillars, as well as the revision of Directive 96/53 on weights and dimensions of commercial road vehicles.

Shift²Rail, a €1 billion R&D initiative designed to enhance the technology prominence of the European rail industry, was also approved.

The new European Parliament was elected in April, and began working in July. Michael Cramer (Greens) became the chairman of the Transport and Tourism Committee (TRAN).

European Council

The European Council, made up of Member State governments and acting as the upper house of EU lawmaking, has not delivered much progress during 2014.

A first reading position was only agreed concerning the Technical Pillar of the Fourth Railway Package, while the Political Pillar was concluded with a so-called progress report. The trialogue to iron out the differences of the EP's and the Council's positions on the Technical Pillar has commenced in 2015.

A common position was reached in Council with the EP concerning Directive 96/53, which was finally adopted in April 2015. Shift²Rail was adopted by the European Council in 2014.

Presidency of the European Council was fulfilled by Greece and Italy in 2014, followed by Latvia (H1.2015) and Luxembourg (H2.2015).

Donald Tusk of Poland was elected to replace Herman Van Rompuy as the President of the European Council in November 2014.

European Commission

The outgoing European Commission, led by José Manuel Barroso, delivered many important proposals over its mandate, actively assisted the passage of European legislation, adopted implementing acts, coordinated the implementation of European law and prepared important reports.

The 2014 European election brought about not only a change of guard at the helm of DG MOVE, where Vice President Siim Kallas was replaced by Violeta Bulc (transport), who - under the new Commission structure introduced by new Commission President, Jean-Claude Juncker - is overseen by Vice President Maros Sefcovic (energy).

Joao Aguiar Machado has been named Director General of DG MOVE, as after two 5-year tenures Matthias Ruete was shifted away from transport. The changes within the senior management of DG MOVE that began with this shift will likely not be finished before Autumn 2015.

The 10 priorities of the new Juncker Commission regrettably did not contain any direct reference to transport, the physical lifeline of the Union.

The outgoing European Commission left a series of important proposals on the table including the much needed revision of the Union's fuel excise duty regime. These were revoked by the new Juncker Commission together with several other proposals affecting environmental sustainability.

Transport Commissioner Violeta Bulc promised a Road Package to extend to various aspects of road transport to include among others the overdue transformation of the

Eurovignette Directive into an eToll Directive prescribing mandatory distance-based road tolling. This Package, foreseen to be unveiled in 2016, should also address the social dumping and safety problems of road haulage.

Directive 92/106 on Combined Transport has been placed into the Regulatory Fitness Programme (REFIT) as a prelude to the long overdue recast of the Directive.

Weights and Dimensions Directive

The revision of Directive 96/53 on the weights and dimensions of commercial road vehicles has been the most closely followed piece of European legislation by the CT sector in 2014.

The final compromise text of the two European legislative bodies is to be greeted by European Combined Transport sector, in spite of containing some inadequacies:

+ All protruding aerodynamic devices must be compatible with Combined Transport requirements; if folded they should not be bulkier than 20cm over the maximum allowed length;
+ Extra size and weight allowances (for aerodynamic devices or alternative powertrains) may not be used to increase the loading capacity;
+ The definition of intermodal transport may be overruled in case a different formulation is agreed during the recast of Directive 92/106;
+ 44 tonne gross weight allowance of trucks engaged in CT positioning legs - carrying any combination of loading units up to 45-feet in length - is only authorised for three-axle tractors; those trucks that are driven by two-axle tractors may only weigh up to 42 tonnes; 15cm length extension for these vehicles is approved.

Careful follow-up of the Member State-level imposition of the new Directive will be necessary regarding the following four points:

- The declaration of the actual net weight of the loading unit by the shipper towards the haulier;
- The mandatory disclosure of this data to those involved in the forwarding of the loading unit (e.g. terminals, CT operators);
- Liability rules pertaining to the shipper and the hauliers in case the net weight information is missing or incorrect;
- The penalties for infringement of any value (weight or dimension) should have been included in the Directive.

Developments in the Railway Sector

The emergence of European Rail Freight Corridors is the most visible development that supports Road-Rail Combined Transport. The recognition of Authorised Applicants (=CT Operators) by several corridor one-stop-shops, as well as some important rail infrastructure managers must also be noted.

The Fourth Railway Package is eagerly awaited by the European CT sector both for the technical and competition increasing aspects that it promises.

The rail vehicle and infrastructure registers, nearly completed by the European Railway Agency, will also aid the challenges that CT Operators face.

Recast of Directive 92/106

Preparations to recast one of the oldest EU directives, 92/106 on Combined Transport, has started in late 2013. DG MOVE commissioned a consortium of consultants to draft a report on the state-of-the-art in the European CT Sector. The preparations included a public consultation in which 86% of the respondents expressed their conviction that the "Directive should be recast to boost European Combined Transport". (Both the study and the public consultation results can be found on DG MOVE's website.)

The process of drafting a recast of Directive 92/106 has been halted by the accession of the new Juncker Commission into power. The so-called "Good Regulation" initiative, spearheaded by Commission First Vice President Frans Timmermans, forced 92/106 into the Regulatory Fitness (REFIT) Program prior to commencing its recast, which will cause an at least year long delay in the process of the recast.

UIRR has been calling for the recast of Directive 92/106 from the promotion legislation, which it is today, into the framework legislation that the European Combined Transport sector needs. The only way to force the harmonisation of the 28 different Member State regulatory regimes into a uniform, EU level set of rules is through the passing of a new CT Directive. The participants of the UIRR Conference on European Intermodal Transport on 4 December 2014 fundamentally agreed with this concept.

"The CT Directive should be reviewed to further boost Combined Transport"

opined 86% of respondents in the 2014 public consultation of the European Commission

The sharing of Rail Net Europe's (RNE's) Train Information System (TiS) data with CT Operators and Terminals - under preparation presently - will further serve the CT sector.

The first phase of amendments to the CT related UIC leaflets was also completed in 2014, however - due to the open points which remained in them - a second wave of changes is currently being considered. These most importantly relate to the codification of infrastructure, rolling stock and loading units.

The means of CT Operators

Combined Transport is organised by private entities that operate under the prevailing regulatory and market circumstances; the European CT market is not dominated by any single player. Economic turmoil and the crisis-related adjustments resulted in significant demand fluctuations exacerbated at times by wild reactions in the prevailing freight rates (largely determined by road hauliers). Even if rather limited, CT Operators have a range of measures at their disposal through which to match the challenges; these are for example:

- **Introducing new services** (trains) better adapted to shippers' needs and following the developments of rail infrastructure;
- **Enhancing competitiveness** through improved service-quality, application of new technologies, streamlining business practices, and reducing costs;
- **Identifying clever investments** that boost capabilities and productivity;
- **Promoting of Road-Rail Combined Transport** towards decision-makers to inform them of the potential of this intermodal system of freight transport; and to get their support for the necessary corrections of the regulatory framework that leads in a fairer direction.

Investments, innovation

European CT Operators and Terminals invested in wagons, terminal and maintenance capacities, loading and traction equipment, and developed IT systems (booking, EDI, quotes and transport planning).

Several new CT connections were launched in Europe and along the Eurasian Corridor, new value added services and efficiency improving reorganisation introduced at several terminals.

Modal Shift Aim of the EU

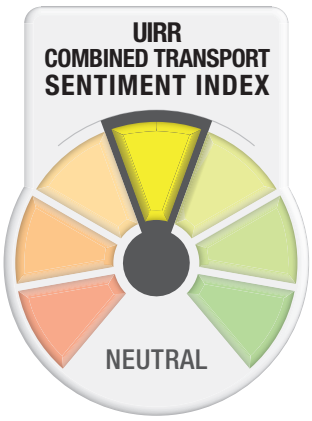
The European Commission's 2011 Transport White Paper declared a very important modal shift aim for freight transport absolutely necessary if the European Union is to curb the greenhouse gas emissions that cause climate change. Accordingly, 30% of longer distance road tonne-kilometres should be shifted to ecologically sustainable modes by 2030 and 50% by 2050.

Calculations differ as to what kind of traffic growth this would demand from rail freight: doubling, tripling or four-fold growth on the basis of the 2010 performance-output. Since Combined Transport is the most dynamically growing production system of rail freight, and considering that intermodal loading units come closest suitable to carry the commodities that fill trucks today, the brunt of this modal shift burden will fall on the back of intermodal transport.

Combined Transport turned an average growth rate of nearly 7% year-on-year for over a decade prior to the economic crisis. Should CT be able to deliver 4-5% average growth during the decades to come the modal shift aims of the European Union could be met. UIRR and its members make every effort to ensure that this growth is realised.

Business Outlook

The UIRR CT Sentiment Index has turned "neutral" for the 12-month period ahead, reflecting that the European CT Sector is searching for an engine. Little has been done by the European legislator since the outbreak of the economic crisis to correct the regulatory imbalances that inhibit a fair competition of transport modes, or to reinforce unhindered competition within the railway sector. Creating a uniform regulatory framework for Combined transport throughout the European Union could also be very useful.



Infrastructure development needs to be accelerated and given a focus for the needs of rail freight, especially when it comes to bottleneck removal and border crossing improvements.

Members' News

ADRIA KOMBI
The Slovenian CT Operator, which works closely with the Port of Koper, realised robust growth both in terms of consignments (+14%) and tonne-kilometres (+18%) during 2014. Both Adria Kombi's port hinterland traffic and its Rola service performed exceptionally well.

ALPE ADRIA
The Trieste-based CT Operator achieved an overall positive performance in consignments, but not in tonne-kilometres as their longer-distance cross-border traffic showed a lacklustre performance.

BOHEMIAKOMBI
The solid growth of the Czech CT Operator continued in 2014 with a 12% expansion in both consignments and tonne-kilometres.

CEMAT
The dominant CT Operator of Italy realised a reduction in its traffic performance due to the weak economic performance of the country and also attributable to the rising costs of traction in the country.

COMBIBERIA
Based on its cross-border connections the Spanish CT Operator delivered solid growth in 2014 in both consignments and tonne-kilometres.

CROKOMBI
The Croatian CT Operator realised robust growth in 2014 - albeit from a relatively low base - mainly attributable to its new connection between Zagreb and Budapest.

FAR EAST LAND BRIDGE
The intercontinental CT specialist, who joined UIRR recently, nearly doubled its turnover in consignments in 2014 as compared to a year earlier.

HUPAC
The Swiss unaccompanied CT operator and terminal managing company, which offers one of the most comprehensive CT networks in Europe, began investing in broad-gauge (1,520mm) wagons to facilitate its intercontinental trains. Hupac's 2014 growth in terms of consignments was small, but the tonne-kilometre output grew dynamically as longer distance connections performed rather well.

INTERFERRYBOATS
The premature phasing-out of the Belgian government's CT funding scheme caused the collapse of IFB's elaborate domestic gateway network, which peaked at over 400,000 consignments in 2011, however resulted in less than 100,000 shipments last year. The compensatory efforts on cross-border relations nevertheless bore fruit materialising in a double digit tonne-kilometre growth for the second year. IFB continued to invest in IT solutions, launching its new quoting service, www.intermodalquote.be.

KOMBIVERKEHR
The largest European unaccompanied CT Operator from Germany invested extensively in various IT solutions to support capacity and train management as well as booking over the year, which otherwise brought a slight decline in Kombiverkehr's overall performance output.

NAVILAND CARGO
The French CT Operator and terminal managing company realised robust growth both in terms of consignments and tonne-kilometres on the back of a well elaborated extension of both its domestic and cross-border network, as well as a series of other innovation (for details see Member's Comment on p.8).

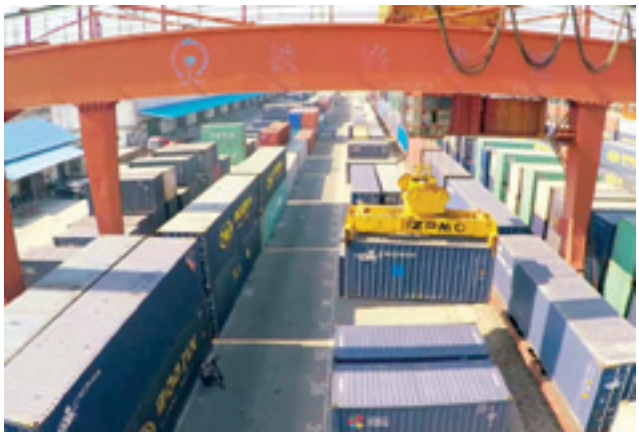
NOVATRANS
The post-ownership change restructuring of this French CT Operator and terminal managing company, and the reorganisation of its network, has not been completed yet. Novatrans suffered a substantial contraction in both consignment and tonne-kilometre terms during 2014.

POLZUG
While the Polish CT Operator managed to slightly grow in terms of consignments during 2014, it lost a substantial volume of its tonne-kilometres due to an unusually high proportion of empty container repositioning traffic on its cross-border routes. Over the course of the year Polzug's management were moved to Poland (Warsaw).

RALPIN
The Swiss Rolling Highway specialist celebrated the transport of the 1 millionth truck over the course of 2014. RAlpin achieved exceptional capacity utilisation and a 1% growth year-on-year. Considering superior capacity utilisation and a lack of new train paths, the operator's growth potential remains narrow for the coming years.

ROCOMBI
The Romanian CT Operator and terminal managing company, which focused on the start-up of the CT Terminal that it took over in late 2013, realised a considerable contraction on its network mainly attributable to a poor performance of the country's rail sector.

TRANSEURASIA LOGISTICS
The intercontinental CT specialist, which provides connections exclusively on Europe-Asia relations, delivered a growth of 4% year-on-year in both consignments and tonne-kilometres.



Transfer of containers between 1435 mm standard gauge and 1520 mm broad gauge rolling stock on the China-Russia border.

UIRR's Year

Activities and Membership Projects ILU-Code

UIRR's objectives - of achieving a fair competitive environment both across transport modes and within the rail sector, and of growing the market for Combined Transport - should be reached through the promotion, enhancement and support of European Road-Rail Combined Transport.

Promote

- Publications: 9 press releases, 2 position papers, 4 newsletters and the annually published UIRR Report.
- A well-visited website: www.uirr.com and a professional group on LinkedIn.
- Personal promotion: appearance and intervention at 34 public events, conferences and working groups; more than 100 one-on-one meetings with EU legislators and Commission officials, sector stakeholders, as well as shippers and consignors.
- Establishment of a platform of regular interaction with key intermodal peer organisations in Brussels.
- Organisation of a major conference on Intermodal Transport in Europe (4 December).

Enhance

- DESTINY Project: a Marco Polo Common Learning Action Project on identification of loading units, dangerous goods transport and cargo securing in Combined Transport.
- EcoHubs Project: an FP7 Project which developed innovative tools to enhance the efficiency of CT Terminals.
- Material contribution to the revision of UIC leaflets that concern Combined Transport.
- Renewal of the collaborative forum of railways and CT Operators - INTERUNIT - to improve its efficiency.
- Partner to the EU Commission Last Mile Study consortium aiming to map final mile connections to rail freight in Europe.

Support

- ILU-Code: the number of registrations increased by 60% over the previous year; this contributed to an ILU- or BIC-Code compliance of over 90% of CT consignments by the end of 2014.
- UIRR aided the marking effort of thousands of loading units through the ILU-Code labelling service.
- UIRR actively participated in the development of the CESAR Tracking & Tracing System.

Development of the Association

- New mission, vision and ultimate objectives were adopted for the new management.
- CT Terminals have been invited to become members alongside CT Operators.
- 6 interest groups were formed to better structure and intensify the involvement of members' experts in the activities of the association.
- A bimonthly management reporting regime was introduced to further enhance internal transparency.
- 8 new members were inaugurated into the association.

New Members

TRANSEURASIA LOGISTICS

Rail-bound freight transport between Europe, the CIS and Asia has become increasingly important as transport costs have risen and environmental awareness has grown. In light of this, Deutsche Bahn AG and the Russian Railways (RZD) founded **Trans Eurasia Logistics GmbH** (TEL) in early 2008.

TEL transport solutions are ideal for almost all freight that can be transported by rail, especially valuable and heavy freight. Using the networks of partner companies TransContainer, Polzug and Kombiverkehr, TEL is a reliable partner for international rail-bound freight transport.

Besides regular services between Chongqing and Duisburg, Rotterdam and Antwerp (16 day journey time), in August 2013 TEL successully started its train services carrying 51 containers between Zhengzhou and Hamburg-Billwerder. The maiden journey, travelling along the Southern route through Kazakhstan, took just 15 days. www.trans-eurasia-logistics.com

CFL INTERMODAL

CFL Intermodal (formerly Eco Logistics Operator - ELO) specialises in combined Road-Rail Combined Transport, transport of semi-trailers and containers transferred from truck to train, and vice versa.

The company offers more than 20 rail connections per week from Luxembourg to the North Sea ports, Northern and Southern Europe; it is a wholly owned subsidiary within the Chemins de Fer Luxembourgeois (CFL) Group. www.cfl.lu/espaces/multimodal/EN/qui-sommes-nous/structure/cfl-intermodal

FAR EAST LAND BRIDGE

Far East Land Bridge [FELB] operates container trains via the Trans-Siberian Route to connect Europe with China, South Korea and even Japan since 2007. In 2011 the company reached the level of 7,000 containers transported, based largely on the company's own stock of thousands of containers.

One of the main advantages offered, is the short transit time compared to the sea freight performance. The transit time depends on container volume per shipment and routing. Basically the average transit time for a single container is about 24 days, and for block-train shipments about 22-23 days.

The core business of providing terminal to terminal CT transport services, FELB's shipments pass via the border station Manzhouli/Zabaikalsk and Brest/Malaszewicze (on the northern route) or Dobra/Chop (on the southern route) in Europe.

FELB is headquartered in Vienna, with offices in Nürnberg, Shanghai and Beijing. The company is part of the RZD Group. www.fareastlandbridge.com

CARGO TERMINAL ENNS

A newly completed trimodal CT Terminal was developed in the City of Enns, where the river of the same name flows into the Danube. The terminal is directly connected to the Western Rail Line of Austria (part of the "Orient East Med" rail freight corridor). The 35 hectare facility consists of 150,000 m² in office and warehouse space and 200,000 m² for transhipment. www.cargo-city-enns.at

JOHN G RUSSELL TRANSPORT

The family owned, Scotland-based **John G Russell Transport** Group presents over 40 years experience in creating full-fledged logistics solutions developing partnerships within the road, rail, sea and air sectors.

Russell's 5 own rail-road transhipment terminals located throughout the United Kingdom form the backbone of the company's operations. Management of these terminals is a main activity for the Russell Transport Group.

The flagship Russell Rail Barking Terminal offers open access to every rail service provider. The fully secure location is AFSO certified to handle goods for transportation through the Channel Tunnel. Barking is the gateway of rail-based intermodal transport into the United Kingdom. www.johngrussell.co.uk

EUROPA MULTIPURPOSE TERMINALS

Europa Multipurpose Terminals supports 31 weekly railway connections from its 4 railway tracks on Pier 6 of Trieste Port to Germany, Luxembourg and the Czech Republic, which consist primarily of craneable semi-trailers that arrive via short sea shipping from Turkey and Greece.

The terminal also handles loading/unloading of break bulk, stuffing/un-stuffing of containers and storage in customs areas with 8,000 m² of covered area.

EMT has been established by the family owned Parisi Group on 2010 as its terminal operation in the Port of Trieste under a 25-year concession (2010-2034). www.emterminals.com

COMBINANT

Combinant is a CT Terminal that was constructed as a joint effort of private investors BASF, Hupac and Hoyer, complemented by EU and Flemish Regional Government support. The terminal, located in the Port of Antwerp, received the first train on 1 March 2010. It operates as an "open access terminal" meaning that it is open to all carriers, rail operators and traction providers.

After nearly 5 years of operation in 2014 Combinant Terminal, as originally constructed with 5 rail tracks and 3 gantry cranes, has exceeded 120,000 consignments handled. Current capacity utilisation is beyond 85% of the designed maximum.

Combinant uses the most advanced technologies in the course of its daily operation, including optical character recognition (OCR), advanced EDI, check-in/check-out and management techniques, while matching leading sector KPIs.

The terminal was recently enlarged by 12,000m² and has added a reach stacker to create a Value Added Logistics Zone where it offers a series of extra services to its users. www.combinant.be/en/home.aspx

LUGO TERMINAL

Lugo Terminal is the manager of two transhipment terminals in Italy, which also offer an extensive range of logistics services at two locations: in Lugo (190,000 m²), to the east of Bologna, and in Giovinazzo (34,000 m²) in Southern Italy.

Lugo offers depot space for 3,200 TEUs - awaiting their loading on either of the 8 tracks that it offers, while Giovinazzo can house up to 1,500 TEUs destined to or coming from its 3 railway tracks.

The 11 tracks on offer at the two terminals altogether translate to 11km of rail, from where regular train connections are offered to a range of West, Northwest and Eastern destinations ranging from Lyon in the West, Belgium in the North and Moscow in the East. www.lugoterminal.com

DESTINY Project

DESTINY, which stands for DEployment of STandards for INtermodal efficiencY, describes a consortium (www.destiny-project.eu), funded under the EU Marco Polo Programme and coordinated by UIRR, dealt with (i) the implementation of the revised EN13044 standard related to the identification and codification of loading units (topics 1 and 2), as well as (ii) with the assembling and the disseminating of industry best practice on load securing (topic 3) and the (iii) handling of dangerous goods consignments (topic 4), and (iv) OCR technologies, register of intermodal loading units and the creation of an e-learning platform (topic 5).

Identification of loading units

The Project compiled a best practice report on the marking and labelling of loading units in line with the requirements and prescriptions of the EN13044 standard.

Codification of loading units

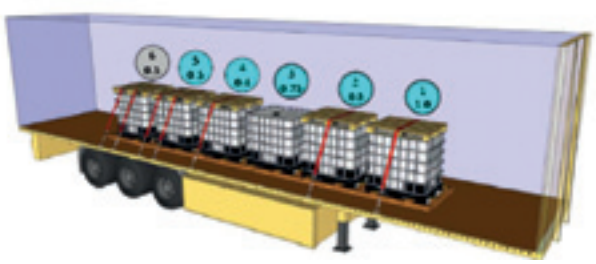
The working group considering the required changes to the relevant UIC leaflets has completed its work, and the UIC Freight Platform voted to adopt these in order to bring about a new regime for the codification of intermodal loading units and wagons used in Combined Transport.

Information was effectively delivered to loading unit manufacturers about the new codification plate defined in EN13044 and the system how it is to coexist with the ILU-Code to be used for owner-identification.

Load securing

The load securing topic had the following focus:

- Analysis of the current situation for load securing in road, rail, inland and maritime (collection of regulations and standards, literature study and interviews)



- A gap analysis, including a dynamic test and terminal visits, identifying the main differences in particular between road and rail, and
- A dissemination and training plan (development of specific materials such as a leaflet for cargo securing in Combined Transport).

It has been concluded that for cargo securing purposes a design acceleration of 0.5g in the longitudinal as well as in the transverse direction provides the required safety level in Road-Rail Combined Transport.

The working group considered the required changes to the relevant UIC loading guidelines, and the UIC Freight Platform voted to adopt these in order to bring about a new regime for the load securing in Combined Transport

Dangerous goods handling

A new dangerous goods leaflet and specific product fact sheets were developed under the guise of the Project, and an eLearning Tool offered to aid its dissemination into practice. In addition an e-tool was devised to support the marking of ILUs carrying dangerous goods.

What made this consortium unique: dissemination

The objectives of the Project were endorsed and its dissemination actively aided by the relevant European industry associations. This collaboration ensured that the DESTINY messages reached every affected stakeholder.

Over 150 training sessions covering all 5 topics have been organised across Europe with more than 2,000 participants.

EcoHubs Project

The EcoHubs Project was initiated under the FP7 Programme with the mission to develop a toolbox of solutions that will aid the enhancement of environmental performance and operational efficiency of CT Terminals across Europe. The proposed ICT tools are all currently tested and validated by the demonstrators. They will be used as key-components for the new ICT environment (or known also as ICT-Ecosystem) of hubs and terminals, which has been defined in the project's vision. For details see www.ecohubs.eu

CCIS
the future of interoperability and connectivity is new

The key challenges for the next generation of IT data exchange architectures are to provide interoperability "without changes" (no change to existing legacy applications and data exchange formats) and connectivity "all at once" (communication with all partners that are connected). The CCIS application is currently being tested in the port of Koper in order to enhance the data exchange between the port terminal and the intermodal operator Adria Kombi. The overall aim is to increase by 20% the total terminal capacity and to optimise the preparation of the CT trains operated by Adria Kombi.

ITEC
the unique G4G calculator for transhipment facilities

The European standard EN 16258, adopted in March 2013, includes a methodology for calculating and declaring the energy consumption and GHG emissions of transport services. However, warehouses and transhipment facilities are not covered by this standard. The EcoHubs project partners contribute to ensure that terminals might also calculate their carbon footprint in a similar scientific approach. The application is currently tested at the following terminals: Antwerp Combinant, Antwerp Main Hub, Interporto Bologna, Ljubljana Moste, Neuss Trimodal and Stockholm Arsta.

ecoTAURUS
a new broad software service for green terminals

Road-Rail Combined Transport is the result of an optimal combination of a rail journey with a first/last mile - as short as possible - on road. It is essential that both terminal operators and trucking companies exchange accurate status information on loading units that will be delivered or picked up and on operational events that might occur on the terminal or during the last mile road journey. The terminals Antwerp Zomerweg and Ljubljana Moste are currently implementing the EcoHubs' solution.

MetricHub
the flexible and adaptable measuring tool for terminals

Terminals need to collect metrics basically for three purposes: for continuous improvement (by monitoring predefined KPIs), for capacity management (management of slot allocations) and for anomaly detection. The tool is actually embedded in the ecoTAURuS application, which has developed some standard dashboards to monitor some important KPIs for the dispatcher or the trucking companies.

BOLANO
the concept of proximity network

The BOLANO demonstrator has set distinctive and incremental priorities regarding the "terminals of the future" aiming at positioning them as dynamic and collaborative facilitators for the whole transport network.

In this context, innovative concepts and related ICT tools have been developed i.e.:

- Transport/Terminal Services Publisher (T2SP) for the dynamic and unified publishing/discovery/updating of detailed terminal services
- Cargo consolidation in the terminal network, based on the "Proximity Network" concept, to facilitate the bundle of the cargo along the transport chain.
- Mobile repair services sharing supported by a publishing/discovery/reservation solution facilitating the wagon damage management.

All tools and services presented are demonstrated in the terminal Bologna, La Spezia and Napoli.

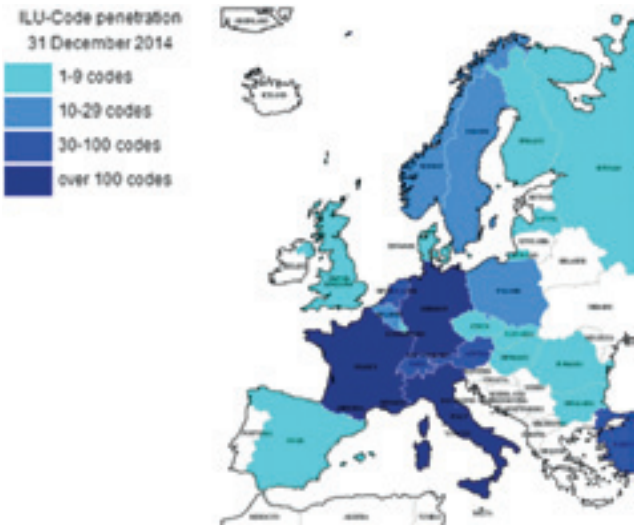
ILU-Code

ILU-Code
identification of Intermodal Loading Units in Europe

The EN13044 standard on the marking of intermodal loading units designates UIRR as the Administrator of the ILU-Code, a new identifier - identically structured as the world renowned BIC-Code - for semi-trailers, swap-bodies and non-ISO containers used in European Combined Transport. Distribution of the ILU-Code was started by UIRR on 1 July 2011 and the deadline for marking the intermodal loading units was 1 July 2014.
www.ilu-code.eu

Progress of marking

The number of ILU-Code owner-key registrations increased by over 60%, as compared to a year earlier, exceeding 700 entities by the end of 2014. This has directly contributed to the ILU- and BIC-Code compliance of intermodal loading units taking part in unaccompanied road-rail Combined Transport in the EU have exceeded 90% by the end of 2014.



Competitiveness enhanced

The freight transport sector and the related governmental services can only base the identification of unaccompanied intermodal consignments on the ILU- and the BIC-Code if these are used by everyone to enable **efficient booking, paperless processing** and **reliable tracking-and-tracing**.

- **Efficient booking:** a single electronic data input to serve as the data-record - part of the electronic consignment note - that will accompany the consignment in every actor's system, who performs the unaccompanied CT transport-chain;
- **Paperless processing:** through the use of optical character recognition (ICR) technologies, CT transhipment terminals will be able to reliably register and verify consignments whether arriving or departing on road or by rail;
- **Reliable tracking and tracing:** the shipper will have easy access to the geographic position of the intermodal consignment by simply keying in the ILU- or BIC-Code of the loading unit into the system.

The outlook

In order to deliver the much desired competitiveness made possible by the ILU- and BIC-Code to the users of Combined Transport, legislation will likely mandate their use in unaccompanied CT within the European Union in the foreseeable future: first through the Modernised Customs Code (for unaccompanied consignments originating from or going outside the EU), and for intra-EU traffic in the recast Directive 92/106.

VIOLETA BULC
EU Commissioner for Transport

"The ILU-Code, a standardized identifier for intermodal loading units in Europe, is indispensable for the competitiveness of Combined Transport. It is an essential component of paperless solutions used by every stakeholder involved in these transport-chains."

Statistics

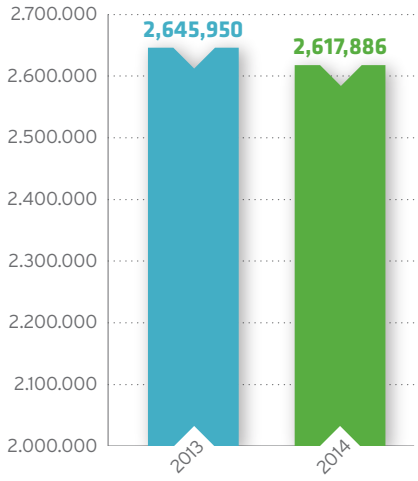
Overview 2014

Summary

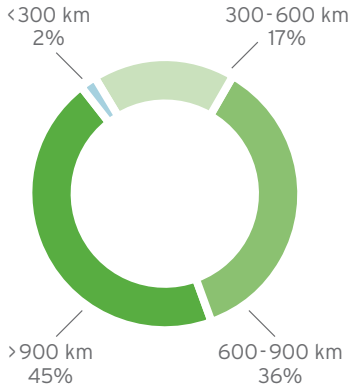
European Combined Transport closed a year of mixed results in 2014: the total number of consignments transported by UIRR member operators declined 1.1%, on the other hand the output, when expressed in tonne-kilometres, grew by 12.2% as compared to a year earlier. Accompanied Combined Transport (RoLa) developed by 12.9%. Shorter distance CT suffered disproportionately, while longer distance and intercontinental relations prospered resulting in an 8% growth of the average distance per consignment from 722km a year earlier to 780km in 2014.

	Border Crossing			Domestic			Total		
	2013	2014	2014/2013	2013	2014	2014/2013	2013	2014	2014/2013
Number of consignments	1,721,656	1,720,722	-0,05%	924,294	897,165	-2,94%	2,645,950	2,617,886	-1,06%
containers	1,293,284	1,272,860	-1,58%	840,720	828,252	-1,48%	2,134,004	2,101,111	-1,54%
(craneable) semi-trailers	301,832	304,270	0,81%	73,600	58,384	-20,67%	375,432	362,654	-3,40%
complete trucks (RoLa)	126,540	143,592	13,48%	9,974	10,529	5,56%	136,514	154,121	12,90%
Average distance	840	932	10.99%	473	485	2.67%	722	780	8.01%
Billion tkm	32.20	37.27	15.72%	8.54	8.45	-0.94%	40.74	45.72	12.23%
Number of TEU	3,443,311	3,441,443	-0,05%	1,848,588	1,794,330	-2,94%	5,291,899	5,235,773	-1,06%

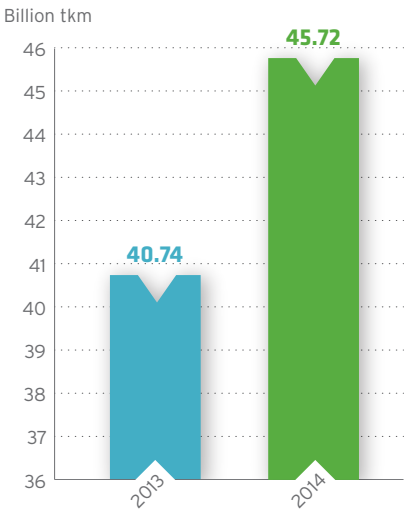
Consignments 2013-2014



Distance matrix



Tonne-kilometres 2013-2014



Evolution of Combined Transport Traffic

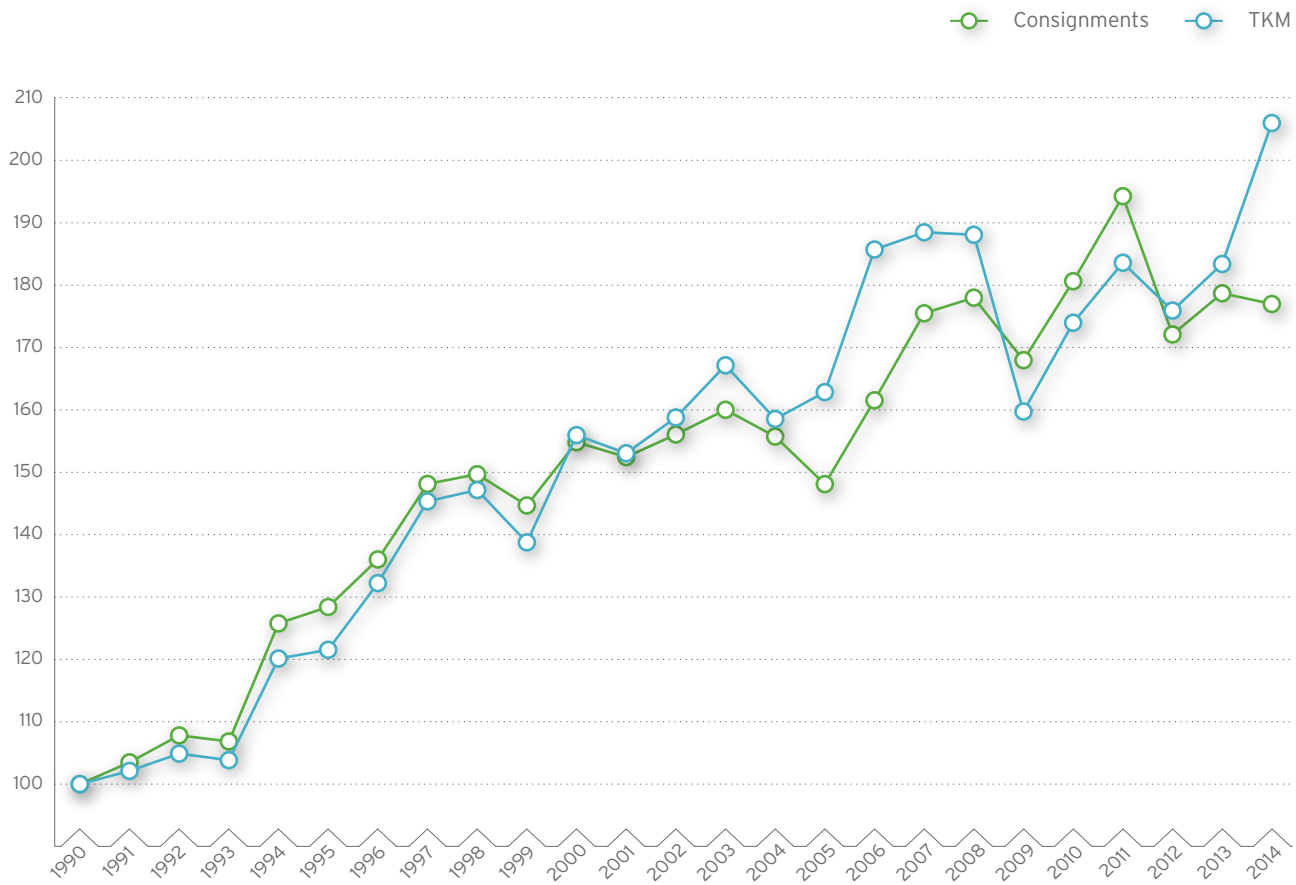
1990 - 2014

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

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

UIRR CT Growth Index - Consignments and Tonne-Kilometres

(REFERENCE YEAR: 1990 = 100)



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

2008	2009	2010	2011	2012*	2013**	2014	% 14-13
2,994,625	2,818,349	3,030,865	3,075,808	2,529,264	2,645,950	2,617,886	-1.06%
2,318,990	2,182,569	2,281,746	2,330,918	2,067,488	2,134,004	2,101,111	-1.54%
246,690	219,800	300,867	318,567	333,597	375,432	362,654	-3.40%
428,945	415,980	448,252	426,323	128,179*	136,514	154,121	12.90%
45.97	38.90	42.37	42.58	39.08	40.74	45.72	12.23%
3%	4%	5%	7%	3%	2%	2%	=
17%	16%	16%	12%	12%	21%	17%	↓
35%	36%	42%	44%	47%	39%	36%	↓
45%	44%	37%	37%	38%	38%	45%	↑

Analysis

Overall: The UIRR CT Growth Index shows - see graph on p.28 - that during the 25 years that UIRR has operated in Brussels, Combined Transport performance has doubled itself. Development has been unabated, despite disturbances in 1998-1999 (enlargement of trucks defined in Directive 96/53, appearance of cheaper East European drivers, and road cabotage liberalisation result in a substantial price drop in road haulage), 2003-2005 (EU enlargement suddenly opens the market to East European road hauliers, who take advantage of inefficient enforcement of road cabotage, which caused a second price drop of freight rates), and 2009-2014 (the double dips of the global financial and European economic crisis).

By type of loading unit: The transport of complete trucks, or RoLa, once over 12% of total CT traffic, has halved in its weight, while the proportion of consignments utilising a craneable semi-trailer increased fast to about 14% by 2014.

Prominent CT-relations: The most important routes of unaccompanied Combined Transport are the ones connecting the Northwest ports area with Northern Italy. RoLa is focused on the Transalpine routes. Traffic is dynamically developing on eastern relations, and even more along the intercontinental routes.

Details of 2014: The UIRR member CT Operators realised a slight decline in consignments on domestic routes, while stagnation on border crossing relations. Only Accompanied Combined Transport (RoLa) of complete trucks could increase its share in 2014, while the shipping of every other type of loading unit either stagnated, or declined.

The best performing relations in 2014 were as follows:

- Belgium vv. Romania +38%
- Austria vv. Slovenia +37%
- Hungary vv. Slovenia +22%
- Czech Republic vv. Italy +22%

The most dynamic, recently launched services that showed significant growth in 2014 were:

- Croatia vv. Hungary +195%
- Germany vv. Russia (China) +191%
- Germany vv. Turkey +182%

Declines have been recorded on several relations, especially in the Western part of Europe

- Switzerland vv. Italy -51%
- Italy vv. Sweden -36%
- Germany vv. Sweden -25%
- France vv. Italy -24%

General Considerations

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

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

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

Abbreviations

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

Country Matrix

Relations		Consignments C	Consignments-km S*km	Average Distance	Average Weight t/C	Gross Weight t	Tonnes-km	Techniques, % consignments			
from	to							ST	SB/CT	SB/CT	RoLa
Country							1,000 tkm		<8,30m	>8,30m	
AT	BE	1,322	1,606,816	1,216	17	22,845	27,777		2%	98%	
BE	AT	1,711	2,078,691	1,215	26	45,267	55,011		50%	50%	
AT	DE	30,286	28,286,610	934	24	739,607	689,172	32%	28%	40%	
DE	AT	24,889	21,966,034	883	27	662,348	584,561	36%	28%	36%	
AT	IT	5,286	1,004,340	190	18	95,148	18,078		70%	30%	
IT	AT	7,780	2,615,485	336	29	223,111	77,650		13%	13%	74%
AT	NL	652	749,197	1,149	25	16,281	18,708		60%	40%	
NL	AT	555	717,615	1,293	24	13,081	16,913		60%	40%	
AT	RU	6	6,156	1,026	27	161	165			100%	
AT	SI	30,888	9,866,846	319	32	996,607	325,629		38%		62%
SI	AT	23,677	7,646,879	323	36	860,340	286,647		18%		82%
BA	SI	5	2,492	498	2	12	6		100%		
SI	BA	8	1,048	131	23	183	24		100%		
BE	BG	259	670,009	2,592	27	6,882	17,838		100%		
BG	BE	91	235,657	2,590	8	702	1,819		97%	3%	
BE	CH	15,674	10,986,178	701	23	363,401	254,714		74%	26%	
CH	BE	15,616	11,869,037	760	14	215,581	163,853		76%	24%	
BE	CZ	947	898,703	949	19	17,878	16,966	100%			
CZ	BE	885	839,865	949	17	14,661	13,913	100%			
BE	DE	16,679	8,803,882	528	21	353,797	197,674		51%	49%	
DE	BE	21,180	11,155,992	527	21	434,895	222,136	4%	53%	43%	
BE	ES	12,754	19,045,490	1,493	28	361,049	539,082		57%	43%	
ES	BE	10,813	18,115,580	1,675	21	225,133	378,738		53%	47%	
BE	FR	31,633	16,423,310	519	17	542,443	281,283		36%	64%	
FR	BE	15,580	7,696,520	494	17	269,670	133,082		30%	70%	
BE	GR	71	161,014	2,268	26	1,811	4,062		80%	20%	
GR	BE	11	19,030	1,730	8	89	154		100%		
BE	IT	99,021	114,603,712	1,157	26	2,539,586	2,931,853	12%	33%	55%	
IT	BE	86,428	106,046,291	1,227	21	1,856,041	2,265,725	12%	26%	62%	
BE	KZ	76	528,352	6,952	28	2,135	14,841		97%	3%	
KZ	BE	32	195,597	6,112	8	248	1,514		97%	3%	
BE	NL	148	20,634	139	17	2,546	355		49%	51%	
NL	BE	660	75,354	114	31	20,266	2,316		77%	23%	
BE	PL	4,318	8,484,870	1,965	28	122,961	241,619		62%	38%	
PL	BE	3,463	5,239,519	1,513	17	59,737	90,382		62%	38%	
BE	RO	9,735	15,949,283	1,638	24	231,339	379,032	19%	25%	56%	
RO	BE	7,758	12,712,815	1,639	20	155,067	254,104	25%	4%	71%	
BE	RU	492	1,500,600	3,050	31	15,450	47,124		97%	3%	
RU	BE	325	879,156	2,705	8	2,667	7,214		97%	3%	
CH	DE	20,731	13,667,501	659	15	306,924	199,207	28%	47%	25%	
DE	CH	24,292	15,337,569	631	26	620,154	389,700	22%	55%	23%	
CH	DK	7	8,211	1,173	10	67	79		100%		
CH	ES	105	194,945	1,866	24	2,520	4,701		100%		
ES	CH	4	4,264	1,066	31	123	131		100%		
CH	FR	114	150,780	1,323	25	2,802	3,706		100%		
CH	IT	1,186	456,247	385	14	16,508	6,351	4%	69%	27%	
IT	CH	2,520	854,425	339	23	58,284	19,762	5%	68%	27%	
CH	NL	8,295	7,741,018	933	19	155,038	144,692	3%	72%	25%	
NL	CH	9,942	8,149,460	820	20	198,478	162,700	3%	63%	34%	
CH	NO	14	25,249	1,804	16	226	408	86%	14%		
CH	SE	28	36,769	1,337	23	635	849	91%	9%		
SE	CH	46	86,777	1,886	26	1,187	2,239		100%		
CN	DE	5,330	53,296,000	10,000	30	161,245	1,612,448		10%	90%	
DE	CN	4,782	47,816,000	10,000	24	112,773	1,127,730		52%	48%	
CZ	DE	10,150	6,323,752	623	19	189,871	118,301	65%	28%	7%	
DE	CZ	14,174	9,835,982	694	24	337,127	233,948	66%	23%	11%	
CZ	IT	2,890	2,418,930	837	38	108,614	90,910	99%	1%		
IT	CZ	2,859	2,392,983	837	23	65,842	55,110	99%	1%		
CZ	PL	23	16,491	717	18	411	295			100%	
CZ	SI	6,480	5,536,577	854	14	89,832	76,754		100%		
SI	CZ	5,580	4,769,003	855	13	75,151	64,229		100%		
DE	BY	193	113,098	588	19	3,663	2,152		90%	10%	
DE	DK	1,713	1,406,459	821	25	43,511	35,725	3%	58%	39%	
DK	DE	1,850	1,248,437	675	5	8,490	5,729		30%	70%	
DE	ES	20,495	31,609,260	1,542	25	513,865	792,644		78%	22%	
ES	DE	20,137	33,317,071	1,655	23	460,876	762,473		78%	22%	
DE	FI	99	162,877	1,645	25	2,497	4,108		46%	54%	
FI	DE	134	196,475	1,466	5	716	1,050		25%	75%	
DE	FR	9,281	9,894,165	1,066	26	241,816	257,806		57%	43%	
FR	DE	7,713	7,986,207	1,035	19	146,085	151,259		60%	40%	
DE	GR	343	718,518	2,095	27	9,218	19,303	1%	89%	10%	
GR	DE	180	362,116	2,012	18	1,894	3,817		81%	19%	
DE	HR	1	725	1,449	44	22	32		100%		
HR	DE	12	11,933	994	11	137	137		33%	67%	
DE	HU	15,348	20,774,070	1,354	25	382,553	515,605	30%	59%	11%	
HU	DE	7,667	9,509,867	1,240	22	170,943	211,214	60%	16%	24%	
DE	IT	317,102	250,722,895	791	28	8,875,999	6,960,684	33%	30%	21%	16%
IT	DE	284,622	242,524,094	852	22	6,400,289	5,114,978	29%	26%	27%	17%
DE	KZ	6	7,962	1,327	27	163	216		90%	10%	
KZ	DE	29	162,196	5,593	8	224	1,255		90%	10%	
DE	NL	61,691	22,324,016	362	20	1,262,394	479,183	5%	46%	49%	
NL	DE	53,390	19,214,593	360	18	948,312	352,588		42%	58%	
DE	NO	688	935,853	1,360	27	18,465	25,117		78%	22%	
NO	DE	273	365,707	1,340	21	5,715	7,656		62%	38%	
DE	PL	21,360	20,802,617	974	22	459,899	444,682		53%	47%	
PL	DE	24,718	26,040,615	1,054	7	183,543	195,295		63%	37%	
DE	PT	456	1,176,520	2,580	28	12,862	33,186		73%	27%	
PT	DE	257	695,061	2,705	11	2,742	7,415		56%	44%	
DE	RO	822	1,067,904	1,299	29	23,637	30,708		88%	12%	
RO	DE	239	116,696	488	8	1,931	943		88%	12%	
DE	RS	39	73,331	1,880	23	891	1,649		100%		
RS	DE	49	70,854	1,446	24	1,166	1,686		100%		
DE	RU	2,112	5,066,709	2,399	26	55,359	133,842		68%	32%	
RU	DE	1,956	4,064,001	2,078	24	46,108	103,399		35%	65%	

Relations from Country	to	Consignments C	Consignments-km S*km	Average Distance	Average Weight t/C	Gross Weight t	Tonnes-km 1,000 tkm	Techniques, % consignments ST	SB/CT <8,30m	SB/CT >8,30m	RoLa
DE	SE	5,242	6,067,728	1,158	28	144,496	167,257	33%	59%	8%	
SE	DE	2,999	2,958,082	987	26	77,932	76,881	56%	37%	7%	
DE	SI	2,434	2,471,383	1,015	32	77,113	78,297		87%	13%	
SI	DE	6,618	5,013,400	758	8	55,128	41,762		84%	16%	
DE	SK	254	460,324	1,812	50	12,679	22,978		98%	2%	
SK	DE	31	41,479	1,360	8	234	318		93%	7%	
DE	TR	2,798	5,916,334	2,114	58	79,131	167,235		77%	23%	
TR	DE	1,567	3,315,772	2,116	12	18,603	39,365		70%	30%	
DE	UA	1	1,296	1,296	29	29	38		100%		
UA	DE	11	27,290	2,481	8	87	217		100%		
DE	UZ	2	5,106	2,553	24	48	122		90%	10%	
UZ	DE	1	2,190	2,190	7	7	15		90%	10%	
DE	YO	1	1,889	1,889	8	8	15			100%	
DK	IT	6,549	8,771,125	1,339	27	174,720	234,036	38%	23%	39%	
IT	DK	7,833	13,029,345	1,663	26	202,311	334,779	51%	22%	27%	
DK	SE	631	191,030	303	15	9,433	2,856	25%	51%	24%	
ES	FR	2,006	1,256,266	626	21	41,907	26,960		28%	72%	
FR	ES	1,464	1,013,753	692	10	14,108	10,250		28%	72%	
ES	GR	13	13,858	1,066	28	360	384		88%	12%	
GR	ES	2	2,595	1,730	8	12	21		88%	12%	
ES	HU	3	3,198	1,066	27	81	86			100%	
ES	IT	2,029	2,277,249	1,122	29	57,920	65,002		80%	20%	
IT	ES	1,659	1,876,955	1,131	25	41,214	46,629		80%	20%	
ES	NL	23	45,344	1,971	9	203	401		50%	50%	
NL	ES	255	284,070	1,114	29	7,443	8,291		50%	50%	
ES	PL	59	83,603	1,417	27	1,584	2,245		100%		
PL	ES	2	2,362	1,181	6	12	15		100%		
FR	IT	11,224	9,486,910	845	26	291,234	246,161		28%	72%	
IT	FR	22,059	19,492,608	884	20	444,336	392,641	2%	88%	10%	
GR	NL	2	2,595	1,730	8	11	20		100%		
GR	SI	20	6,189	1,359	4	80	25		100%		
SI	GR	72	99,216	1,378	30	2,184	3,009		100%		
HR	HU	855	483,930	566	8	6,840	3,871		38%	62%	
HU	HR	2,714	1,536,124	566	3	7,842	4,439		42%	58%	
HR	SI	330	95,700	290	20	6,600	1,914		42%	58%	
SI	HR	83	6,189	75	15	1,237	92		42%	58%	
HU	IT	453	539,966	1,192	32	14,664	17,479		99%	1%	
IT	HU	375	558,750	1,490	21	7,712	11,491		99%	1%	
HU	NL	547	921,456	1,685	18	10,108	17,028		61%	39%	
NL	HU	1,506	1,932,198	1,283	26	39,667	50,893		61%	39%	
HU	RO	161	159,481	991	19	3,073	3,044		81%	19%	
HU	RS	13	6,394	492	12	156	77		100%		
HU	RU	6	8,760	1,460	20	122	178		36%	64%	
RU	HU	4	8,911	2,546	5	17	43		36%	64%	
HU	SI	14,607	9,972,199	683	14	208,208	142,144		100%		
SI	HU	18,817	12,979,402	690	15	281,333	194,055		100%		
IT	GR	8	10,648	1,331	32	253	336		100%		
IT	LT	7	9,289	1,327	20	141	187		71%	29%	
IT	LU	2,637	1,885,455	715	8	19,863	14,202			100%	
LU	IT	2,659	1,901,185	715	31	83,074	59,398			100%	
IT	NL	34,729	44,279,051	1,275	21	723,483	921,322	15%	47%	38%	
NL	IT	45,046	53,558,961	1,189	28	1,269,098	1,506,033	6%	57%	37%	
IT	NO	26	39,103	1,504	28	732	1,100		99%	1%	
NO	IT	1	1,268	1,268	31	31	39		100%		
IT	PL	386	630,724	1,634	26	10,207	16,678		81%	19%	
PL	IT	58	78,351	1,363	24	1,388	1,890		81%	19%	
IT	RU	11	28,776	2,616	24	262	686		97%	3%	
RU	IT	1	1,365	2,730	9	4	12		97%	3%	
IT	SE	3,298	5,634,305	1,708	27	90,212	154,119	37%	28%	35%	
SE	IT	5,118	6,627,842	1,295	29	148,960	192,689	46%	24%	30%	
IT	TR	108	269,783	2,498	29	3,150	7,869		17%	83%	
TR	IT	94	231,668	2,465	5	501	1,235		26%	74%	
KZ	PL	6	25,380	4,230	7	44	187		100%		
LT	DE	2	3,222	1,611	29	58	93		90%	10%	
LT	PL	8	12,888	1,611	22	180	290		98%	2%	
LT	RU	45	96,764	2,150	28	1,268	2,726		67%	33%	
RU	LT	27	56,160	2,080	7	196	408		95%	5%	
MK	SI	1	1,062	1,062	3	3	3		100%		
SI	MK	3	2,847	949	5	15	15		100%		
NL	PL	662	969,168	1,464	22	14,533	21,277		39%	61%	
PL	NL	764	1,116,204	1,461	18	13,499	19,722		39%	61%	
NL	RO	448	1,006,208	2,246	30	13,479	30,275		95%	5%	
RO	NL	159	438,363	2,757	8	1,294	3,568		95%	5%	
NL	RS	55	122,595	2,229	29	1,609	3,587		100%		
RS	NL	18	30,042	1,669	8	142	238		100%		
NL	RU	326	714,918	2,193	30	9,871	21,648		99%	1%	
RU	NL	136	282,882	2,080	17	2,304	4,792		99%	1%	
NL	UZ	2	4,982	2,491	17	35	86		99%	1%	
UZ	NL	2	5,020	2,510	8	16	40		99%	1%	
NO	DK	1	268	536	8	4	2		100%		
PL	RU	679	1,739,598	2,562	27	18,642	47,760		99%	1%	
RU	PL	236	851,091	3,606	8	1,802	6,500		99%	1%	
RS	SI	105	56,116	534	3	359	192		100%		
SI	RS	121	52,224	432	20	2,368	1,022		100%		
SI	IT	1,761	465,925	265	3	5,348	1,415		100%		
SI	SK	18,251	14,563,385	798	13	230,218	183,703		100%		
SK	SI	14,108	11,556,991	819	7	104,822	85,868		100%		
UA	HU	4	6,558	1,640	31	124	203		36%	64%	
UA	NL	80	207,185	2,606	8	644	1,678		100%		
Others		13,967							100%		
TOTAL		**1,720,722**	**1,604,572,320**	**932**	**23**	**39,403,658**	**37,269,053**	**18%**	**42%**	**32%**	**8%**

Member companies

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Activities: UCT - RoLa - RSO - RH
Agency: SI
Total traffic: 352,000 TEU
Revenue: € 42 million

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amministrazione@alpeadria.com
www.alpeadria.com

Activities: UCT - RoLa
Agency: IT
Total traffic: 86,000 TEU
Revenue: € 34 million

BOHEMIAKOMBI

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

Activity: UCT
Agency: CZ
Total traffic: 30,000 TEU
Revenue: € 7,5 million

CEMAT

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

Activities: UCT - RSO - ECM
Agency: IT
Total traffic: 713,000 TEU
Revenue: € 206 million

CFL INTERMODAL

Zone industrielle "Riedgen"
L - 3451 Dudelange
Tel.: +352 51 98 10
Fax: +352 51 98 10 211
info@cfl-intermodal.lu
www.cfl.lu/espaces/fret/fr/group/structure/ferroviaire/cfl-intermodal

Activity: UCT
Agency: LU
Total traffic: 200,000 TEU
Revenue: n/a

COMBIBERIA

c/Rafael Herrera, 11; 2º, Pta 203
E - 28036 Madrid
Tel.: +34 91 314 98 99
Fax: +34 91 314 93 47
combiberia.madrid@combiberia.com
www.combiberia.com

Activity: UCT
Agency: ES
Total traffic: 67,000 TEU
Revenue: n/a

COMBINANT

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

Activity: TTM
Agency: BE
Total traffic: 120,000 units
Revenue: n/a

CROKOMBI

Heinzelova ulica 51
HR - 10000 Zagreb
Tel.: +385 1 61 51 867
Fax: +385 1 61 51 869
crokombi@crokombi.hr
www.crokombi.hr

Activity: UCT
Agency: HR
Total traffic: 8,000 TEU
Revenue: n/a

CARGO TERMINAL ENNS

Ennshafenstaße 45
A - 4470 Enns
Tel.: +43 662 8588 6510
Fax.: +43 662 8588 6599
www.ct-sbg.at

Activity: TTM
Agency: AT
Total traffic: 284,000 TEU
Revenue: n/a

FELB

Rivergate Handelskai 92 - Gate 2/3.
OG/TOP G A - 1200 Vienna
Tel.: +43 1 890 63 39 0
Fax: +43 1 890 63 39 63
sales@fareastlandbridge.com
www.fareastlandbridge.com

Activity: UCT
Agencies: DE - PL
Total traffic: 28,000 TEU
Revenue: n/a

HUPAC

Viale R. Manzoni 6
CH - 6830 Chiasso
Tel.: +41 91 695 28 00
Fax: +41 91 695 28 01
info@hupac.ch
www.hupac.ch

Activities: UCT - TTM - RSO - ECM - RU - CA
Agencies: BE - CH - DE - IT - NL - RU
Total traffic: 1,100,000 TEU
Revenue: € 392 million

INTERFERRYBOATS

Houtdok 25 A
B - 2030 Antwerp
Tel.: +32 3 270 27 00
Fax: +32 3 226 26 26
info@interferryboats.com
www.interferryboats.com

Activities: UCT - TTM - ECM - CA - RH
Agencies: BE - DE - TR
Total traffic: 490,000 TEU
Revenue: € 150 million

JOHN G. RUSSELL

Hillington
Glasgow
G52 4XB
Tel./Fax: +44 1418108200
www.johngrussell.co.uk

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

KOMBIVERKEHR

Zum Laurenburger Hof 76
D - 60594 Frankfurt
Tel.: +49 69 79 50 50
Fax: +49 69 79 50 51 19
info@kombiverkehr.de
www.kombiverkehr.de

Activities: UCT - TTM -RSO - ECM - RU
Agencies: DE - ES - IT - NL - PL
Total traffic: 1,390,000 TEU
Revenue: € 425 million

LUGO

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

Activity: TTM
Agency: IT
Total traffic: 24,000 units
Revenue: n/a

NAVILAND CARGO

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

Activities: UCT - TTM - RSO - RU
Agency: FR
Total traffic: 335,000 TEU
Revenue: n/a

NOVATRANS

10 rue Vandrezanne
CS 91397
F - 75634 Paris Cedex 13
Tel.: +33 1 40 87 97 00
Fax: +33 1 40 87 97 65
info@novatrans.eu
www.novatrans.eu

Activities: UCT - TTM - RSO
Agency: FR
Total traffic: 220,000 TEU
Revenue: € 57 million

POLZUG

Container Terminal Burchardkai
Bürogebäude 1
D - 21129 Hamburg
Tel.: +49 40 74 11 45 0
Fax: +49 40 74 11 45 45
hamburgpolzug.de
www.polzug.de

Activities: UCT - TTM - CA - RH
Agencies: DE - PL - UA - GE - AZ
Total traffic: 141,000 TEU
Revenue: n/a

RALPIN

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

Activities: RoLa - ECM
Agencies: CH - DE - IT
Total traffic: 220,000 TEU
Revenue: n/a

ROCOMBI

Blvd. Dinicu Golescu 38
RO - 010873 Bucharest
Tel.: +40 21 312 23 14
Fax: +40 21 312 17 74
info@rocombi.ro
www.rocombi.ro

Activities: TTM - UCT
Agency: RO
Total traffic: 4,500 TEU
Revenue: n/a

TEL (TRANS EURASIA LOGISTICS)

Bellevuestraße 3
D - 10785 Berlin
Tel./Fax: +49 30 297 54 800
www.trans-eurasia-logistics.com

Activity: UCT
Agencies: DE - CN - RU
Total traffic: 25,000 TEU
Revenue: n/a

EUROPA MULTIPURPOSE TERMINALS (EMT)

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

Activity: TTM
Agency: IT
Total traffic: 132,945 units
Revenue: n/a

Activities – glossary:
UCT: Unaccompanied Combined Transport
RoMo: Rolling Motorway
TTM: Transhipment Terminal Management
RSO: Rolling Stock Operator (owner / lessee)
ECM: Entity in Charge of Maintenance
RU: Railway Undertaking
CA: Customs Agent
RH: Road Haulage

Countries:
AM (=Albania), AT, AZ (=Azerbaijan), BE, BG, BiH (=Bosnia), BZ (=Belarus), CH, CZ, DK, DE, EE, EL, ES, FI, FR, GE (=Georgia), HR, HU, IE, IT, LT, LU, LV, ME (=Crna Gora), NL, PL, PRC (=China), PT, RO, RS (=Serbia), RU (=Russia), SI, SK, SE, TR, UK

UIRR Consignment: corresponds to the transport capacity of one tractor-trailer combination on the road (equivalent to 2.0 EVP/TEU). A TEU (twenty-foot equivalent) is a unit of measurement corresponding to an ISO container of 20 feet in length (6.10m), used to express traffic capacities or flows, principally in the maritime transport sector.

- CT Operators
- Transhipment Terminal Managers
- CT Operators who also manage terminals

Terminal Activities

TRANSHIPMENT TERMINALS MANAGED BY UIRR MEMBER COMPANIES

Name	UIRR code	City	Rail	Road	IWW [2]	SSS [3]	RoLa	in units	Total surface (m^2)	Number of cranes (gantry+mobile)	Number of tracks
AUSTRIA											
CT Enns		Enns	●	●	●			284,000[1]	150,000	3	4
BELGIUM											
Antwerp HTA Quai 468	697	Antwerp	●	●				85,614	53,000	6	5
ATO		Antwerp	●	●	●			125,867	93,598	6	2
Cirkeldijk	119	Antwerp	●	●				121,310	52,000	6	4
Combinant	012	Antwerp	●	●				119,057	126,000	4	5
Euroterminal	113	Genk	●	●				31,681	80,000	3	4
Zomerweg	114	Antwerp	●	●				70,716	77,000	6	4
DEUTSCHLAND											
Singen	574	Singen	●	●				85,039	50,000	2	5
FRANCE											
Avignon	299	Avignon	●	●				85,612	85,296	7	9
Cognac		Cognac	●	●				5,953	1,500	2	2
Dourges	289	Lille	●	●				65,857	600,000	9	14
Gevrey		Gevrey	●	●				4,696	20,000	3	2
Hourcade	241	Bordeaux	●	●				70,135	110,000	4	5
Marseille	237	Marseille	●	●				36,779	15,000	3	6
Miramas	21	Marseille	●	●				50,715	495,000	4	3
Mouguerre	222	Mouguerre	●	●				18,043	35,000	2	2
Noisy-Le-Sec	200	Paris	●	●				34,550	70,000	4	4
Socquence		Le Havre	●	●				4,680	4,000	1	2
Toulouse	245	Toulouse	●	●				34,216	32,000	2	6
Valenton	203	Paris	●	●				84,698	120,434	5	4
Vénissieux	270	Lyon	●	●				144,377	450,000	2	4
ITALY											
Busto Arsizio Gallarate	409	Milano	●	●				363,206	242,800	14	11
Bari (Giovinazzo)		Bari	●	●				8,000	30,000	2	8
Lugo	003	Lugo	●	●				16,000	190,000	3	
Europa Multipurpose Terminals (EMT)	452	Trieste	●	●		●		132,945	80,000	4	4
Novara RoLa	252	Novara		●			● RALPIN	99,334			
POLAND											
HUB Terminal Poznan	953	Gadki	●	●				144,687	320,000	6	5
Terminal Dąbrowa Górnicza	72	Dąbrowa Górnicza	●	●				42,506	225,000	4	4
Terminal Kontenerowy Pruszków	958	Pruszkow	●	●				61,190	32,976	8	3
Terminal Kontenerowy Wrocław	962	Wrocław	●	●				30,950	45,000	6	4
ROMANIA											
Bucuresti Sud		Bucharest	●	●	●			5,000	N/A	2	4
SWITZERLAND											
Aarau	600	Aarau	●	●				40,986	20,000	3	5
Basel Weil	599	Basel	●	●				9,504		6	6
Basel Wolf	602	Basel	●	●				43,402	17,000	6	2
Chiasso Z4	603	Chiasso	●	●				7,395	7,000	1	2
Lugano Vedeggio	605	Lugano		●			● RALPIN	10,529	2,000	1	2
UNITED KINGDOM											
Barking	837	London	●	●				28,891	40,000	5	4

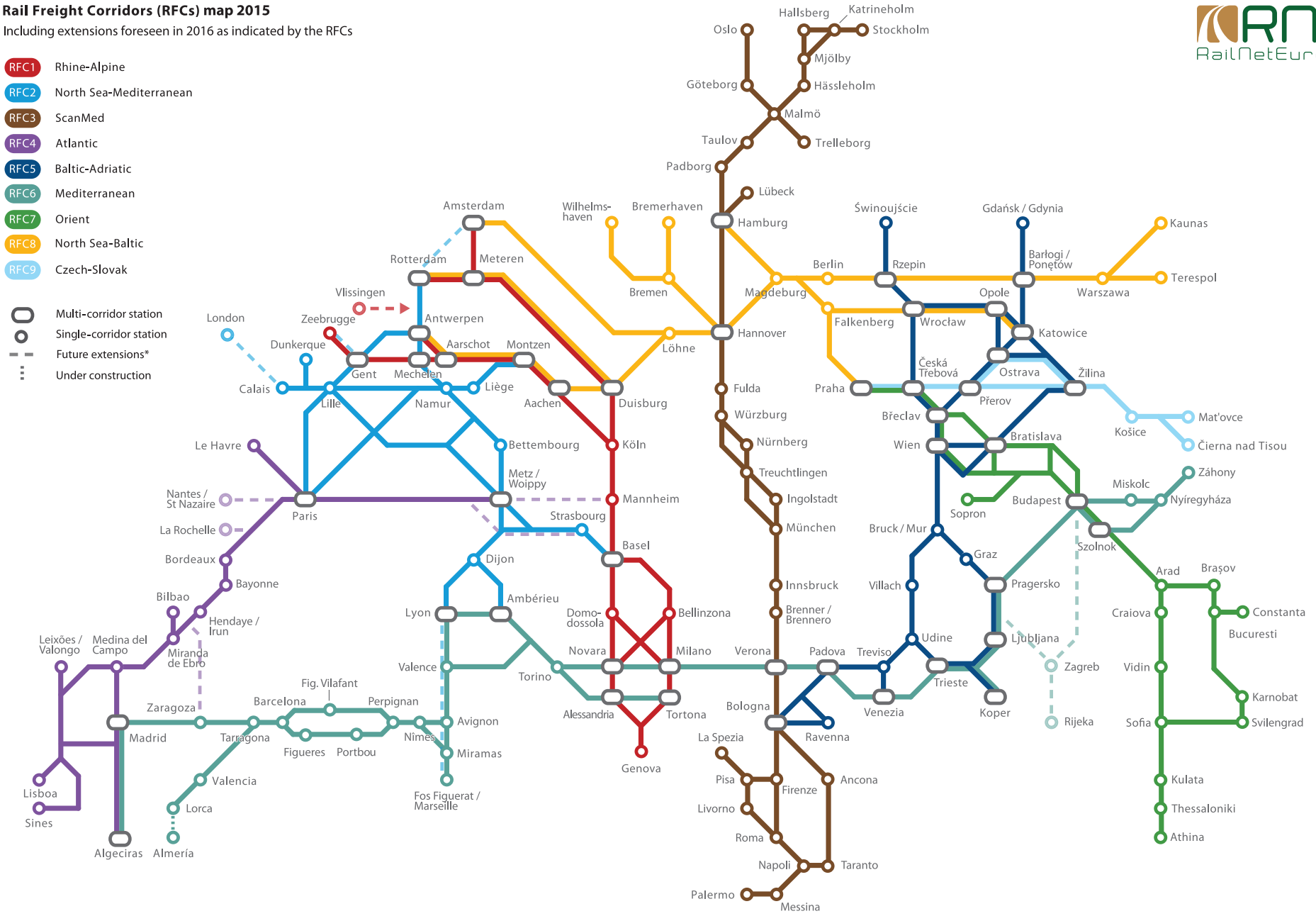
[1] Figure in TEU | [2] IWW = inland waterway | [3] SSS = short sea shipping

Rail Freight Corridors (RFCs) map 2015

Including extensions foreseen in 2016 as indicated by the RFCs

- RFC1 Rhine-Alpine
- RFC2 North Sea-Mediterranean
- RFC3 ScanMed
- RFC4 Atlantic
- RFC5 Baltic-Adriatic
- RFC6 Mediterranean
- RFC7 Orient
- RFC8 North Sea-Baltic
- RFC9 Czech-Slovak

- Multi-corridor station
- Single-corridor station
- Future extensions*
- Under construction



*This map does not include all potential RFC routes' extensions contained within Annex 2 of EU Reg. 1316/2013 (extensions are subject to market studies). For further details, please refer to the individual RFCs' websites.

UIRR

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