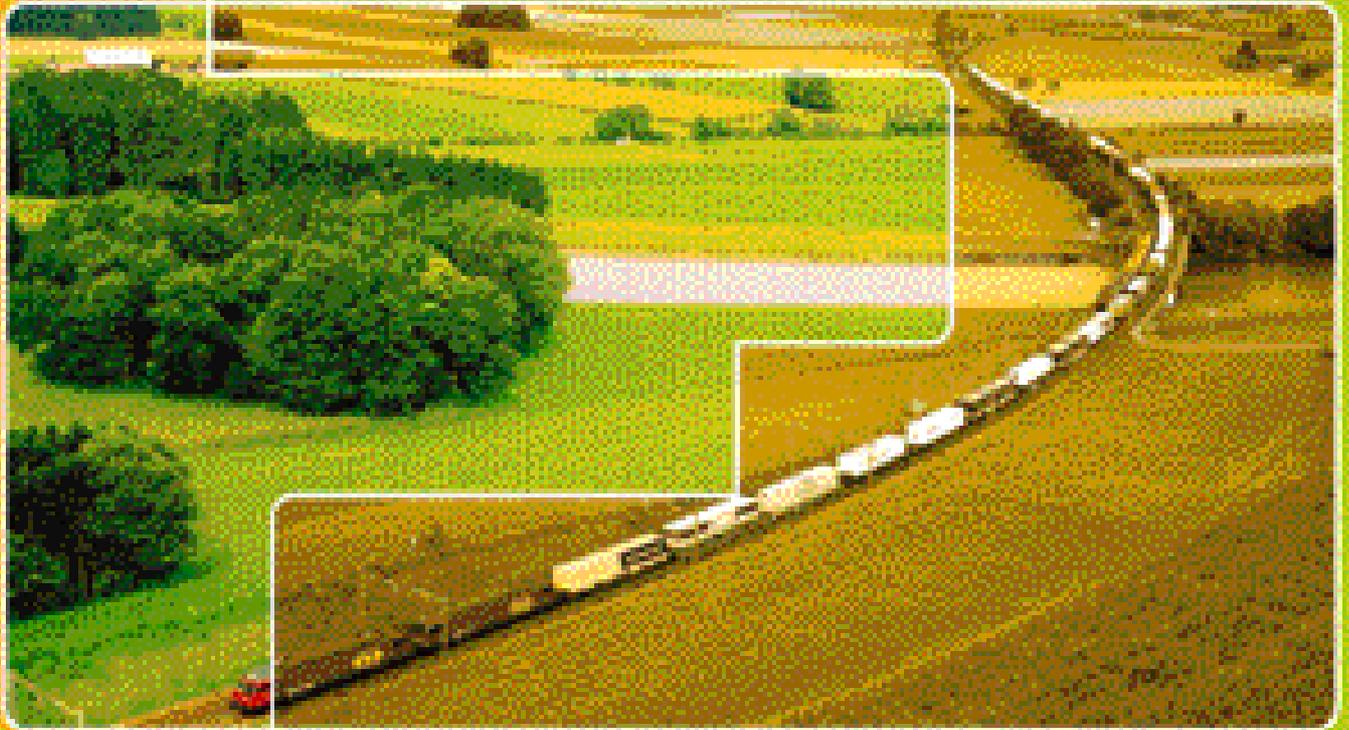


UIRR

International Union of combined Road-Rail transport companies



Report
2001



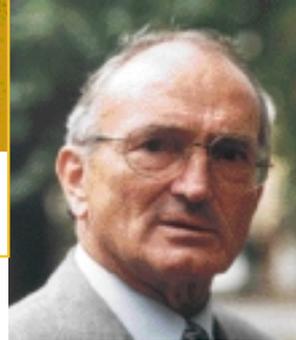
IMPRESSUM

Publisher: UIRR s.c., Brussels
c/o Diane Chevreux

Pictures: UIRR s.c., and
member companies

Design: Tostaky s.a., Brussels

Printed in Belgium on chlorine-free paper.



FOREWORD

WERNER KÜLPER
Chairman of UIRR

2001 will go down in world history as a year of crisis, the events of which may also have slowed down the growth of transport. However, it is precisely at difficult moments when markets are streamlined and new concepts are created. So the UIRR report for this year is devoted to "Strategic Developments".

Combined Transport (CT) thrives on the know-how of operators and the commitment of transport and logistics companies. However, in order to be successful, CT needs effective rail transport and the right political framework conditions.

The European Commission's White Paper on European transport policy published in September 2001 was broadly welcomed by the UIRR: not only does inter-modal transport occupy a central position and revitalisation of the rail sector is considered as one of the most important missions, but it also picks up on a series of proposals to this effect made by the UIRR, in particular those on guaranteeing quality.

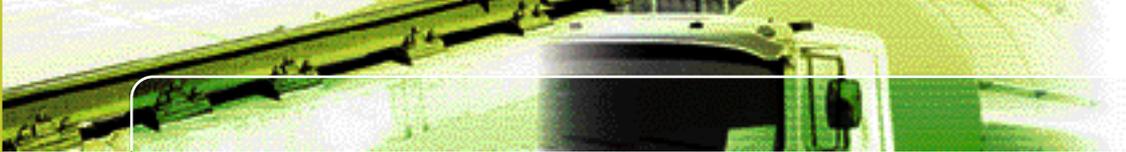
Unfortunately, the gap between words and deeds has not got any smaller in the recent past. France, Great Britain and the EU as a whole have given a sadly blatant example of this by reacting more hesitantly to the problem of refugees who attack freight trains in an attempt to reach Great Britain through the Channel Tunnel. The lack of coordination between States has affected CT operations which have been considerably reduced or even halted altogether. The operators and rail companies have recorded enormous losses. The little political war between the Member States appears to count more than the survival of CT. Transport companies and operators have to find out for themselves, and at their own expense, that they cannot trust the line of argument in favour of CT. History should not be allowed to repeat itself, in other words the "dupes" are the people who make long-term investments in environmentally friendly modes of transport.

This event has clearly shown that there is a need for a powerful official lobby to promote CT. Journalists, politicians, parties and environmental protection associations think first of all about the transportation of passengers, the only field they know about from their own daily experience, whereas if freight transport were organised differently this could hardly fail to make a decisive contribution to resolving this transport crisis. Consequently, UIRR companies will make every effort to raise awareness among professionals and the general public. The book about 30 years of UIRR, tracing the history of CT, various press releases and position papers as well as the complete makeover of the uirr.com website will contribute to this objective.

One of the most important moments in the European construction process was undoubtedly the successful introduction of the Euro as the single currency in 12 countries of the Union. This is another reason to end the barriers which are still in place in rail transport. The international development of rail rather than the protection of national railway companies must be placed at the heart of transport policy. European States must pay less attention to those of their neighbours who are still dragging their feet over liberalisation, but rather seek to be amongst the first to show how much more traffic will be transferred to the railways as a result and thanks to exemplary investments in infrastructure.

CT needs to win people over by offering good overall services and competitive prices. By getting this right, it will grow as a market. This market deserves to develop.

Werner Külper



REJECTING STAGNATION

RUDY COLLE

Director General of UIRR

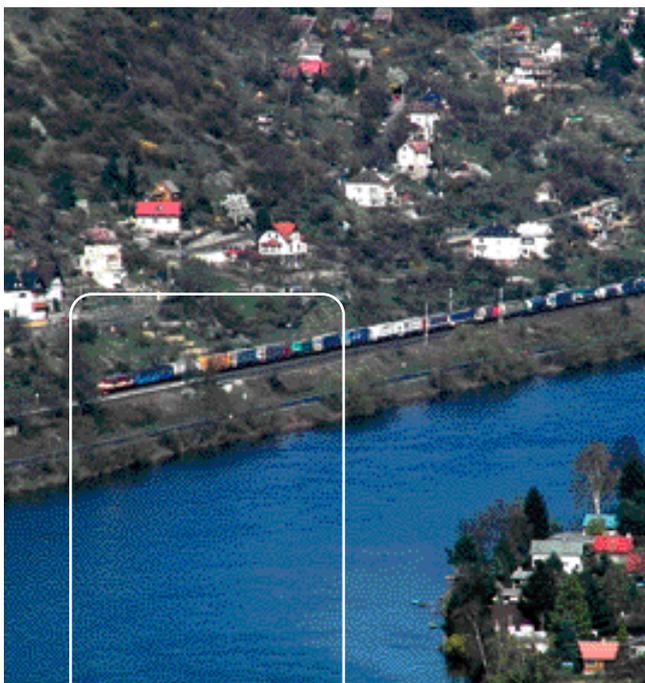
In 2001, UIRR operators did not reach the number of consignments recorded the previous year in spite of their efforts. This was because the two essential prerequisites for the development of CT were not in place. The first of these was reliable rail services: this deterioration in fact compromised the attractiveness of the overall product. The second of these prerequisites was equal opportunities of access to the market for all modes, and hence too for all mode combinations. Certain political measures that were required for this condition to be implemented had not yet been adopted, while others were only applied to a limited extent.

Far from giving way to pessimism, however, the UIRR launched numerous additional schemes aimed at gradually recovering the expansion rates achieved in the years 1980 to 1997.

To compensate for the shortcomings in conditions on the ground, its members are making increasing use of complete trains, which they control and for which they assume the financial loading risk; they are also looking to enter into partnerships of a co-decisional nature with railway companies.

Meanwhile, the UIRR Office in Brussels has been particularly active on the political front, and has had the satisfaction of observing several of its demands finding their way into recent communications issued by the Commission.

Thus, the White Paper of September 2001 reveals a more explicit determination than had previously been expressed to promote intermodality and complement the creation of the internal market by gradually opening up the rail freight market. This is cause for rejoicing, but for firm believers like ourselves in the virtues of liberalisation as the way to revitalise rail freight, the timetable for completely free access



under international arrangements remains a very far one, even though the Railway Package of January 2002 should bring it forward by two years.

From experience, we are also aware that words often take a long time to be translated into action. Thus, ten years after the entry into force of Directive 91/440, its provisions have not yet been applied consistently in all quarters, as though the problems of the transport sector did not call for drastic remedies.

Our sense of optimism is therefore tempered by vigilance, and we shall continue to insist that it is time to move on from making choices to taking hard decisions, because everything has now been said about what needs to be done.

Three action plans mentioned in the White Paper are deserving of our particular attention:

- the extension of rail capacities: although it is clear that existing infrastructures will be unable to absorb the expansion in freight traffic expected by 2010, economic commonsense suggests that every non-infrastructureal means of increasing capacities should also be employed. Thus, the use of improved train planning and monitoring should make it possible to offer upwards of 25% more capacities with the existing infrastructure and means of production, which are generally underutilised;
- the fair allocation of costs: the framework Directive announced for 2002 raises the prospect of a fairer, more transparent treatment of the various modes, with the introduction of a system of infrastructure charges that takes account of external costs;
- the quality of service: it is essential for our traditional partners to put their house in order in this area. Failing this, the quest for salvation will be searched for in the possibilities offered by the sector's liberalisation. In any case, the system of compensation for quality shortfalls that the Commission intends to introduce with our full support will mean that in future, instances of malpractice incur sanctions.

It is time for us all to act!



NEW MILESTONES FOR THE FUTURE

WERNER MAYWALD

Director General of Kombiverkehr

Combined Transport is slowly but surely developing in Europe. CT operators are now faced with the important task of continuing with the development of a high quality European rail concept. Over the last few years, new milestones for the future have been laid down.

Sending goods by rail is more complex than transportation by lorry, especially when the route travels through a number of different countries. This is something we are all aware of. Every time we come up against considerable obstacles when collaborating with and between European railway companies. This is why two years ago Kombiverkehr decided to develop its own know-how on rail traction and, in collaboration with partners, to set up the technical and financial conditions for a traction company. The first pilot train was launched last year. Currently, there are two return journeys a day between Munich and Verona via Austria, a route which has been criticised for a number of years due to the mediocre quality of the services as a result of a lack of locomotives or staff.

After around six months, the following can be seen: it is also possible, based on a well thought-out concept, to use this relation to achieve higher than average quality services. Quite rightly, this point was given the highest priority in the planning of the project and its specific implementation is guaranteed by sustained overall quality control and by efficient management of qualitative standards.

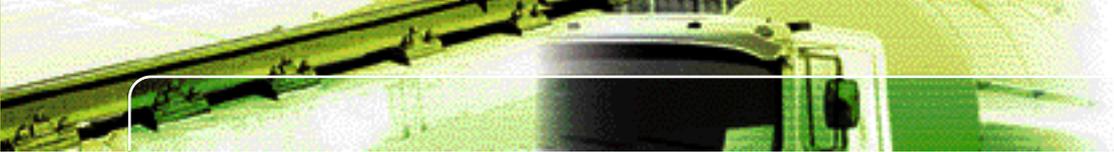
New ideas and concepts are needed. However, thinking about what already exists can also give us fresh impetus. Thus, last year, Kombiverkehr decided to enter a strategic alliance with its largest services provider, DB Cargo AG. The aim of the collaboration between both companies is to relaunch CT. By combining the two companies' respective skills in the fields of marketing, product planning, rail services and commercialisation, the decision-making processes



can be speeded up, ways of transporting goods nationally and internationally developed and rail transport as a whole revitalised.

These are apparently two different development strategies: on the one hand through the offer of an own traction, competition is stimulated to the customer's advantage. On the other hand and at the same time, collaborating with a rail company can only reinforce the quality of the services. These two strategies, which are only apparently contradictory, have a single objective, to offer the CT customer a transport network which meets the market conditions, marked by high quality and laying solid foundations for the future of rail freight.





THE CTL REPOSITIONING STRATEGY

ANTHONY GONNEVILLE

Director General of CTL

Combined Transport Ltd. (CTL) was formed in 1991 as the UK representative for the UIRR. Intermodal rail transport in the UK was well served by British Rail at the time, but the new opportunities offered by the Channel Tunnel created a market perfectly suited to the UIRR's philosophy. Working closely with UIRR partners Novatrans and Cemat, CTL developed reliable, customer-oriented services between Italy, France and the UK.

Over the last few years the Channel Tunnel services have been affected by events beyond CTL or UIRR control (fires, floods and strikes) culminating in late 2001/early 2002 in the devastating impact of daily attacks on rail freight services by illegal immigrants attempting to reach the UK.

Thanks to the support and understanding of its customers, CTL is maintaining the promotion of Channel Tunnel routes as its core service. In spite of all the difficulties, it is currently developing a five-year strategy for growth which will be implemented on existing and new markets.

Manchester and over 200 Europe wide rail terminals. The success of this service will to a large extent depend on the involvement and support of UIRR partners.

With this new service, CTL is aiming to target northern and eastern European markets to complement the existing southern European routes through the Channel Tunnel. The introduction of this new link may well prove an alternative for CTL's customers in the event of major service interruptions on the Channel Tunnel route in the future.

Domestic Strategy

CTL is currently studying a number of projects within the UK, some to/from the port of Purfleet/Manchester, others from seaports. It is in the process of adopting a system of route management, treating each route as an individual profit centre.

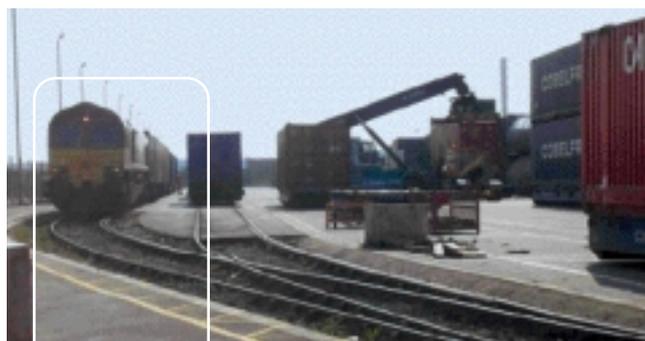
Following the rail privatisation in the UK, there has been an increase in rail freight business. This growth has been accompanied by the creation of numerous private rail terminals and train operating companies. CTL intends to apply its expertise as a rail aggregator to the UK domestic market. Market analysis will identify the key traffic flows and customers. On the basis of this information, CTL will look to pull together the most appropriate terminals using the largest rail operator on the route and supply suitable wagons for the traffic.



New Service Launch

In Mai 2002, CTL will be launching a new service, a daily train connecting Euro Terminal in Manchester with the port of Purfleet. This is the cornerstone of CTL's development strategy and will open the door to a large number of new markets:

- It will become the first domestic intermodal service linking England's capital with a major manufacturing hub.
- Due to the support of Cobelfret Ferries, CTL will be offering through booked transit from both Zeebrugge and Rotterdam to Manchester. With Cobelfret sailing four times a day to Zeebrugge and twice a day to Rotterdam, CTL will be able to offer a fast, frequent and reliable service.
- In collaboration with the other UIRR operators, the company will offer customers through booked transit between





ACTING ON DIFFERENT LEVELS

BERNHARD KUNZ

Director General of HUPAC Intermodal SA

In Europe, liberalisation has already led to many changes. We need to see this as a chance to create a more efficient and more profitable CT network. Operators, railway companies and the political world, everyone has a contribution to make.

Deadlines for launching new products onto the market

Current tenders from large European shippers oblige logistics companies to make competitive offers within a very short time. In view of the deadlines for launching new CT products onto the market, it is hardly surprising that all too often we lag behind the road sector. We need to speed up these processes.

Lack of rail resources

In spite of the bottlenecks on the road during the period of economic expansion seen over the last few years, opportunities to increase volume have not been taken. Why is this? Not enough locomotives, drivers and wagons available. This missed opportunity has led carriers to invest in road vehicles rather than in equipment suitable for CT.

Competitiveness

Synergies need to be found and existing processes optimised. A 5% annual improvement in productivity needs to be achieved so that the market becomes aware that the CT system is capable of keeping costs under control and is ready for the future. This will result in a climate of confidence among customers.

Collaboration between operators

Competition is creating a dynamic in the European CT offer, a process which is certainly positive for users but which reduces operators' profit margins. Thanks to collaboration at line level, the UIRR is on the right track.

Developing feeder routes over the Alps

With regard to transit through Switzerland, the development of Offenburg-Basel and Luino/Chiasso-Milan feeder lines is of vital importance. If bottlenecks persist, the base tunnels via the Gotthard and the Lötschberg will not provide much of an improvement. We also need to adapt the gauges between Domodossola and Gallarate in order to optimise the Simplon line for CT trains to Milan.

Harmonisation of train path prices

There is far too much variation in train path prices in Europe. In some countries, the prices are calculated according to gross tonnes and not train kilometres, which penalises freight transport in relation to the transportation of passengers.

Regulation of priorities and quality

Currently, goods trains pay more for a train path than passenger trains, even though the quality of the former is lower due to the preferential access given to the latter. International rail freight should be given priority on at least an equal footing with regional transport.



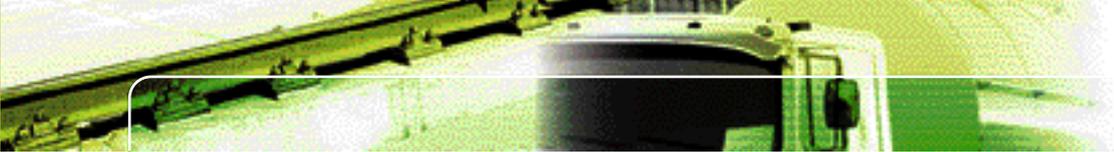
Building terminals

Terminals are crucially important for CT. Terminal projects must take absolute priority in order to allow the creation of the necessary infrastructures within a reasonable time. All too often, local political interests are an obstacle to the creation of a competitive network of terminals in Europe.

Customs procedures and harmonisation

International rail freight transport is at a disadvantage due to a series of obstacles of a technical and administrative nature which road transport does not suffer from. It is essential to allow private railway companies to gain access to faster customs procedures and to standardise and speed up the acceptance procedures for train locomotives and drivers.

Joint efforts by railway companies and operators, accelerated liberalisation and public investments in the rail infrastructure must encourage the market to make greater use of CT.



TRW HAS THE WIND IN ITS SAILS

JEAN-LUC MELARD

Director General of TRW

In spite of a precarious economic climate since the events of 11th September 2001 and after four difficult years, the 2000 financial year, which showed a profit, already hinted at a recovery in TRW's ability to compete. The good results achieved in 2001 are largely attributable to the strategic choices made.

Increasing the fleet of wagons

The reinforcement of TRW's fleet of wagons is part of the development strategy. The company has a large number of these and it has placed an order for 75 new multi-purpose units. Hitting the right balance between leased wagons and the company's own wagons ensures TRW's proactivity when faced with the requirements of the market and allows it to respond to increases in demand when rail quality improves.

Banking on near at hand customers and expanding the customer portfolio

At a time of increasing globalisation in the economy, there is a trend towards the concentration and the pooling of resources in the transport world, especially among carriers. Thus, CT operators need to quickly adapt and react by means of an offer which meets customers' expectations. As a result, TRW has opened a trade office in Antwerp and adapted its customer relation teams.

Offering new products

As the need for product diversification is a priority for operators, new projects are being looked at, in particular the setting up of a second train to Spain via Port-Bou and the creation of a platform in Lyon in order to make it a hub for the operational system. TRW also intends to restore its links with Central Europe.

Banking on human resources

The company's personnel hold the key to providing successful services. At TRW, good human resources management means that staff are involved and take part in strategic choices, through information and interpenetration in all departments. The new technologies are used to carry out everyday work. The obtaining of ISO 9001 certification is one result of this.

Developing a vision of close-to-market operations

The Cortax system of "concentration and distribution of traffic on axes", developed since 1991 with the UIRR partners Cemat and Novatrans, uses the hub at Schaerbeek in Belgium which links the 9 medium-sized Belgian terminals out of which TRW operates. This hub still represents an important part of the company's shipments, but the current trend is for more and more direct trains. The reasons for this are simple: the hub cannot be extended indefinitely and, in practice, direct trains show a better quality of service. This strategy relates to the density of traffic in the Benelux area. In fact, the creation of huge terminals would cause considerable problems. So, the SNCB and TRW have gone for locally based terminals. The commissioning of the GRC terminal, in the suburbs of Liege, is part of this vision.

The advantage of a SME such as TRW is its reactivity and its ability to adapt. It has also for a long time been receptive to all experiments in opening up the rail market because its location in the heart of the Benelux region means that it is used to living in a world where there is always competition.



THE YEAR 2001 IN BRIEF

POLITICAL DEVELOPMENTS

2001 was a year with considerable developments in terms of European transport policy, in particular in the railways



area: adoption of the first railway package, proposal of the Marco Polo programme to divert traffic away from the road, succeeding PACT (Pilot Actions for Combined Transport) and the appearance in

September 2001 of the European Commission's White Paper on transport policy looking ahead to 2010.

Development of projects with the support of the European authorities

Two projects proposed by the UIRR have been selected with a view to European match funding within the framework of the PACT programme: the second phase of the Norway project and a study on the reduction of CO₂ emissions thanks to CT. The UIRR Liaison Office in Brussels is managing these.

The PACT project Norway-Sweden-Germany-Italy

The aim of this project is to further develop the transport between Norway and the rest of Europe, by organising the logistics chain for goods at controlled temperatures (transportation of fish from Norway and chemicals). Beside the UIRR Liaison Office, **Kombiverkehr** and **Swe-Kombi**, three Baltic seaports participate in the project as partners; they carry out an active traffic monitoring.

The CO₂ PACT Project - The States which signed the Kyoto protocol gave a commitment to reducing the emissions of greenhouse gases (8% for the European Union) between



2008 and 2012 in relation to 1990 levels. The aim of the PACT CO₂ project is to quantify this reduction in relation to "all road" transport. The partners involved are the UIRR Liaison Office, the research companies SGKV (D), Nestear (F) and the transport company Lugmair Handels- und Transport GmbH (A).

CESAR or the new technologies working for CT - The ultimate scope of the CESAR (Co-operative European System for Advanced Information Redistribution) project is to create a common virtual interface between UIRR operators and their customers. After a number of years of sustained research, the partners have prepared a reliable high performance communication tool thanks to which their customers can book and monitor the process of their consignments in real time (www.cesar-online.com). In order to make "CESAR" even more attractive, by the end of 2002 they will be offering two additional features: the management of any irregularities if there are delays and the uploading of the various train timetables.

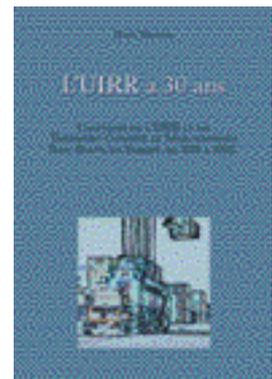
Miscellaneous

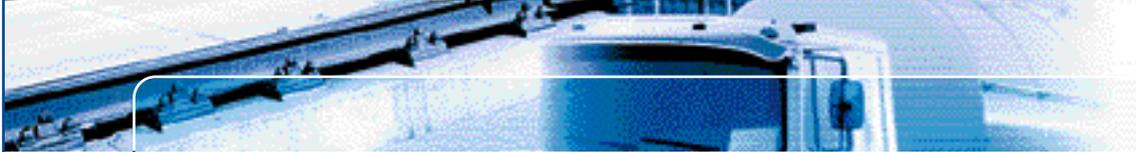
The new UIRR site - The new UIRR site was launched in spring 2002 (www.uirr.com). It is a greater source of information than before (annual reports, speeches, position



papers, photos, statistics, precise technical data, projects, etc.) thus contributing to improving information for the partners, the general public and improving communication between operators.

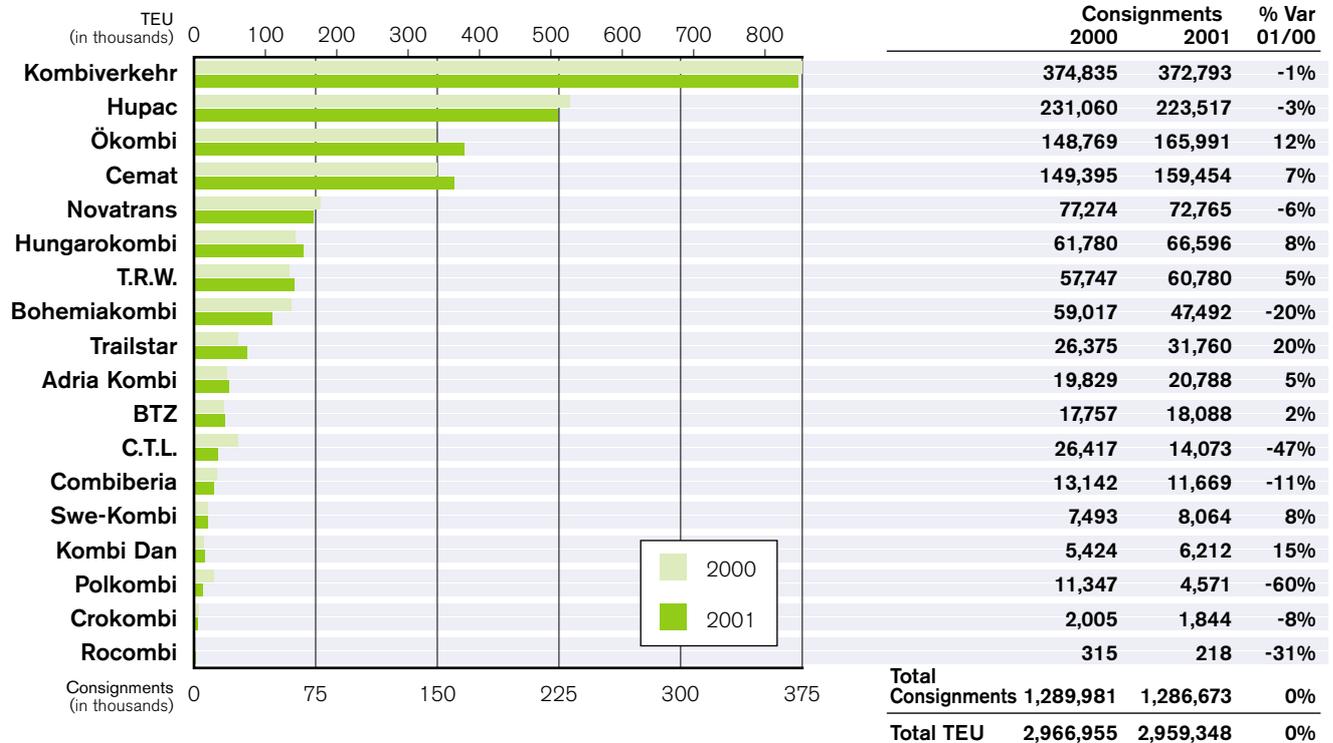
The book "L'UIRR a 30 ans" - The book published in 2001 in French and in German was welcomed by transport professionals and the specialised press. It traces the history of CT over this period and is a mine of information both for experts and for beginners curious to find out more alike. This book can be ordered from UIRR companies or from the Liaison office.





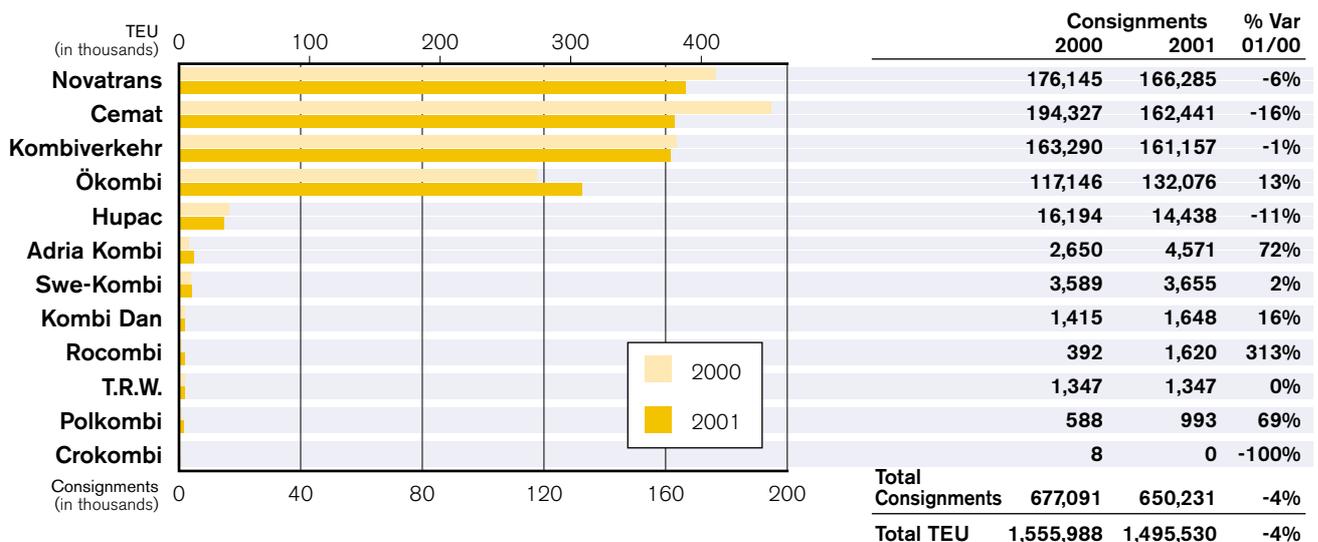
THE YEAR 2001 IN BRIEF - TRENDS

INTERNATIONAL TRAFFIC



The UIRR companies were able to maintain their traffic levels despite the economic slowdown and the French railway strike. Moreover, the disturbances/interruptions of Channel Tunnel services from the beginning of November due to attempts by immigrants to reach illegally England were also weighing heavily on the overall result. As a consequence, the British UIRR member CTL recorded a 28% fall in traffic with Italy and 63% with France. There were, nevertheless, a number of interesting areas in which progress was made: 12% on the Austria-Germany axis, 11% on the Austria-Hungary axis, 12% between Belgium and Italy, and 24% between Italy and the Netherlands. Concerning the Rolling Roads, the relations Szeged and Wels plus Ljubljana and Salzburg also achieved very good results with increases of 43% and 25% respectively.

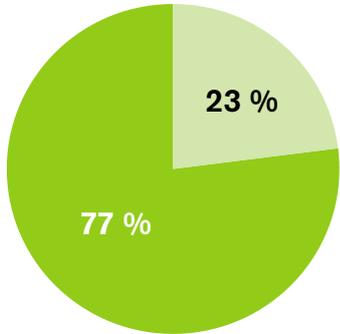
NATIONAL TRAFFIC



The traffic volume at national level fell by 4%. Two countries had to face particularly difficult situations. In Italy, the national railway undertaking was not able to respond qualitatively to the new production scheme based exclusively on complete trains, with the numerous delays leading to a large number of customers returning to the road. And in France, there were virtually no CT trains to be seen during four weeks due to the strike in March/April, which was reflected by a 6% decline in traffic. In Austria, on the other hand, both accompanied and unaccompanied transport grew strongly with increases of 12% and 14% respectively.

THE YEAR 2001 IN BRIEF - TRENDS

TOTAL TRAFFIC



■ National ■ International

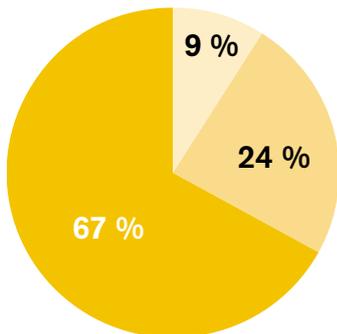
International (Int.) and National (Nat.) traffic in Mio. TKM

Year	Int.	Nat.	Total
1992	13,206	7,043	20,248
1993	14,490	6,844	21,334
1994	17,077	7,606	24,682
1995	17,720	7,250	24,970
1996	19,584	7,583	27,167
1997	21,527	8,334	29,862
1998	21,926	8,308	30,234
1999	20,742	7,846	28,588
2000	24,330	8,156	32,486
2001	24,663	7,217	31,880

Traffic performance levels, expressed in tonne-kilometres, have differently grown. International traffic displayed a slight rise of 1%, with three routes sharing 55% of the overall volume: Germany-Italy (30%), Belgium-Italy (13%) and Germany-Austria (12%). National traffic recorded a decline of 12%, corresponding to a loss of around 1 billion tkm. Substantial increases for Austria (+8%) and Germany (+9%) were not able to compensate for the decline affecting France (-8%) and, in particular, Italy (-37%).

The average distances covered were approximately 750 km internationally and 550 km nationally. The average tonnage of a loading unit was 26 tonnes for international and 20 tonnes for national traffic. Per working day, the UIRR companies transferred more than 9 000 long-distance road transports to rail, equivalent to a line of heavy trucks of more than 150 km long.

TECHNIQUES



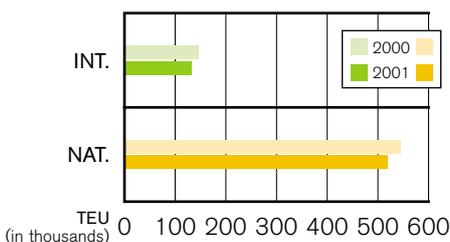
■ Semi-trailers
■ Rolling Road
■ Swap bodies

Proportion of CT systems of total traffic in thousand consignments

Year	Swap bodies	Semi-trailers	Rolling Road	Total
1992	835	229	225	1,289
1993	884	202	212	1,297
1994	1,057	220	253	1,529
1995	1,079	224	312	1,615
1996	1,161	207	344	1,711
1997	1,333	185	346	1,864
1998	1,335	166	382	1,883
1999	1,260	154	406	1,821
2000	1,333	172	460	1,964
2001	1,300	171	466	1,937

In unaccompanied CT, the share of swap bodies and containers continued to occupy top spot with 67% of the consignments dispatched in 2001. Customers using CT are increasingly moving towards longer bodies (40' containers and 13 m swap bodies). The proportion of semi-trailers remained constant by virtue of more consistent use of this method on the Germany-Italy axis. In global terms, accompanied transport is slightly on the increase, while international Rolling Road transport only shows a decline in the UIRR statistics: the Freiburg-Milano was replaced by a Rolling Road between Freiburg and Novara, operated by a company, Ralpin, which is not affiliated to UIRR. This route, which passes by Mount Lötschberg, accommodates a track gauge of 4m.

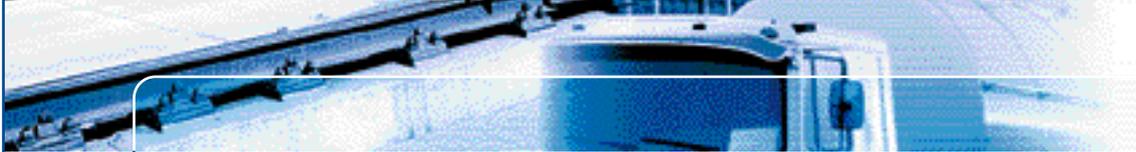
ASSOCIATED MEMBERS



National (Nat.) and International (Int.) traffic in TEU

Year	Int.	Nat.	Total
2000	146,584	543,914	690,498
2001	131,491	519,390	650,881
	-10%	-5%	-6%

For CNC, the year 2001 resulted in a stabilisation of its turnover, though this conceals contrasting developments in the company's two areas of activity. Maritime operations grew almost 6% over a year characterised by a first half in which volumes were very constant and a second half-year during which all the effects of the global economic slowdown were felt. In contrast, continental operations set the tone with sales declining by 5% over the business year 2001. The French railway strikes in Spring and the considerable disruptions affecting international traffic, especially on the Great Britain route, had a negative impact on volumes and, more seriously, shook customer confidence.



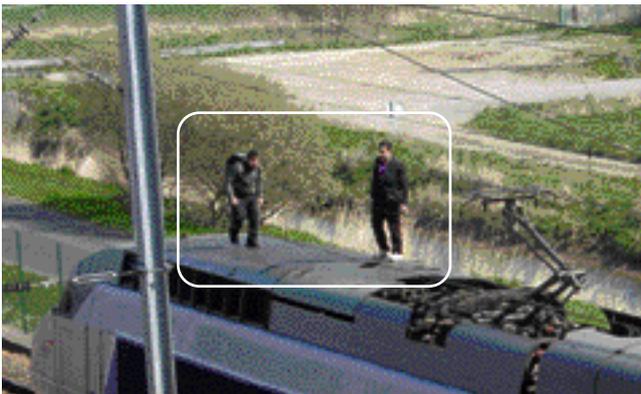
THE YEAR 2001 IN BRIEF

THE ABILITY TO ADAPT

A history of Tunnels

The Gotthard Tunnel - Faced with the accident which occurred in the Gotthard road Tunnel on 24th October 2001, the response from **Hupac Intermodal**, SBB, RAlpin and BLS was to immediately set up a "task force" to look at the possibilities of guaranteeing continuity of heavy traffic on the North-South axis. Additional transport capacities were thus made available, especially between the terminals in the North of the Alps and the Tessin canton. **Ökombi**, **Kombiverkehr** and **Cemat** also adapted their offer according to events.

Channel Tunnel - Over the last few years, the quality of railway services through the Channel Tunnel has been considerably affected by a series of tragic events and most recently by attacks by illegal immigrants on freight trains.



The lack of any real will on the part of the French and British authorities to find a lasting solution to this difficult situation is blatant. These blockages are still a concern and any return to normal cannot be foreseen before June 2002 in spite of the security improvement work in progress – which is in any case broadly insufficient – at the Fréthun-Calais terminal. Every day the survival of several CT operators is endangered, including **CTL** which has already lost more than half of its traffic. Other operators such as **CNC** have been affected and are suffering the loss of large volumes over the cross-Channel link.

Changes and repositioning of companies

Hupac Intermodal and **Kombiverkehr** have entered into a cooperation agreement with the Norwegian company Cargo Net AS and the Swedish company Rail Combi AB to develop CT between Northern Europe and the rest of the Continent. In order to become more efficient and to rein-

force the customer approach, the marketing and reservation of transport from Scandinavia from 1st January 2002 will be exclusively carried out by these two companies. In the first phase the collaboration will see the setting up of Gateway terminals in Trelleborg and Malmö for Sweden, Taulov for Denmark and Hamburg for Germany. Then, during the second phase, the three partners intend to extend their cooperation to Spain, France and Eastern Europe.



The strategy used by **BTZ**, the only UIRR member company to exclusively offer bimodal freight transport, has been redefined. Wabash International, the American builder of semi-trailers, has sold all of the shares it owned in BTZ to Bimodal Verwaltungsgesellschaft (BVG) and to the Brenner Schienentransport AG (STR). The two new shareholders now hold the RoadRailer licence for Europe. They intend to noticeably extend the transport offers to Cologne, Hamburg, Verona and other destinations, and to reinforce their collaboration with transport and logistics companies.

TECHNICAL DEVELOPMENTS

Opening and extension of CT terminals

The CT road-rail centre in Mouguerre, "Bayonne Intermodal", was opened in May 2001: French national and



THE YEAR 2001 IN BRIEF

international links are served, in particular to/from a number of terminals in Belgium and Germany (Cologne and Mannheim). **Novatrans**, **Kombiverkehr**, **Cemat**, **TRW** and **Combiberia** are associated in the capital of the company operating the yard. This centre has innovative, high performance equipment (four rail tracks served by two rubber-tyred gantries). These companies will thus be able to meet the growing demand from the markets from the south of the Aquitaine region and the Iberian Peninsula. Extensions are also planned within the framework of the expected development of CT, especially towards Spain. The centre should offer a way around the problem of the lack of capacities and railway investments in Irún and Hendaye.

The opening of the Lomme site located near Lille was also an important event in 2001. This platform is jointly operated by **CNC** and **Novatrans**, as a joint venture set up for this purpose. New sites have been opened in France in the late 2001: Bordeaux Hourcade and Rennes.

For years, there has been a need for a modern transshipment yard in the Hungarian capital. The current Budapest

Józsefváros terminal has reached its full extension capacity. So a decision has been taken to create a transshipment yard (BILK) with a logistics centre on the outskirts of the city. An international consortium and the MÁV have both given a favourable response to the tender which was issued. **Hungarokombi**, **Ökombi** and **CNC** had shown interest, as have representatives of the ports, the railways and other investors. However, at the end of 2001 the Hungarian government decided to develop this project in collaboration with Hungarian interests only. **Hungarokombi** will be broadly involved in the setting up of the terminal: it intends to make it the hub for its transport operations.



Innovation on wagons

The new wagon built by **Cemat** is recommended for the transportation of swap bodies and containers and meets the geometric characteristics for wagons of the standard type as classified in the UIC leaflets. Thanks to its Y25 bogie with a maximum axial load of 22.5 tonnes and its lighter chassis, it allows a maximum useful load of 72 tonnes on category "D" lines (100km/h) and 64 tonnes on category "C" lines (120km/h).



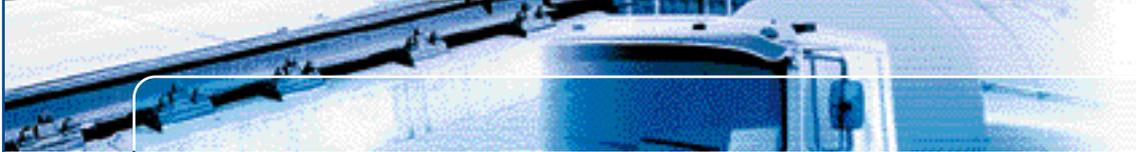
INNOVATIVE SERVICES

Developing the Gateway networks

In February 2001, the operators **Cemat** and **Kombiverkehr** linked their gateway system together from the terminal in Verona Q.E. (served destinations are: Bari, Bologna Interporto, Brindisi, Catania, Gela, Marcianise and Palermo; still to come: a link with Patras in Greece). The creation of such a link between the German and Italian gateway networks allows a better management of the capacities by regrouping the shipments from nodal points. It concerns the international traffic of complete trains and shuttle trains. This link is the extension of the PACT Euronet project (phase 1) which involves both operators in the creation of an integrated management system of the capacities of trains for intermodal services between Germany and Italy and through Austria.

Developments in the Nordic countries

The "Nordic link" between Norway, Sweden and Denmark have been further developed in 2001. The railways, as well as shipowners, in particular Norwegian ones such as Kystlink use this corridor: a freight line has been introduced between Hirtshals (DK) and Brevik (N). CT operators, including **Kombi Dan**, are banking on the development of complete trains and are waiting for the setting up of an inter-Nordic CT network (the Nordic triangle) in order to develop transport to/from Italy.



THE YEAR 2001 IN BRIEF



In addition, 2001 was favourable to the development of shuttle trains by the Dutch company **Trailstar**, Rotterdam-Italy in particular. The single wagons traffic Rotterdam-Austria and Rotterdam-Denmark has grown and should move towards the concept of a shuttle train. Since October 2001, Trailstar has been offering the Rotterdam Maasvlakte/Waalhaven-Duisbourg (DeCeTe) shuttle 4 times a week, operated by **Hupac Intermodal** with APL.

New Rolling Road developments

Rolling Road has seen new developments in 2001. With a year's delay, 200 low-loader wagons with extremely innovative technical standards were delivered to Ökombi, allowing the entry into service of two new links, Wörgl-Verona (**Ökombi** and **Cemat**) and Wels-Maribor (**Ökombi** and **Adria Kombi**). The delivery of these ten axle wagons lays the foundations for an ambitious new development concept which should allow a doubling of capacities over the next few years and thus meet the priorities of Austrian transport policy. The Wels-Maribor link, which currently offers two trips per day in both directions, should lead to a considerable rise in rail freight in the trans-European X corridor. The possibility of a third pair of trains is currently being considered.



In 2001, the Lovosice-Dresden Rolling Road, which combines the UIRR partners **Bohemiakombi** and **Kombiverkehr**, saw a drop in the rate of use in relation to 2000. However, since this Rolling Road came into service in 1994 and up until the end of 2001, 40,958 complete trains have transported 641,170 HGVs, which can be considered a success. This Rolling Road also enjoys considerable political support.

Polkombi has continued its efforts to put into service a shuttle train for the transportation of HGVs in transit through Poland on the Brest/White Russian border and Frankfurt/Oder links, with the support of the Polish Ministry of Transport. Other projects are currently being drawn up, in particular on the bilateral Poland-Germany axis.

Developments with the Balkan seaports

Rocombi has strengthened its collaboration with the Black Sea port of Constanta, by introducing shipments of containers into national traffic in October 2001. In international service there is also a demand, customers of the Romanian company wishing to organise transport between this port and Hungary, Yugoslavia, the Ukraine and the Czech Republic.

Crokombi is also satisfied with the introduction in October 2001 of the new feeder service between Damiette (Egypt) - Pirée (Greece) - Ploce and Rijeka (Croatia) - Venice (Italy).



This could create opportunities for the rail freight traffic in Croatia from the port of Rijeka to countries in Central and Eastern Europe: there is particular interest for Germany, the Czech Republic, Slovakia and above all Hungary.

MEMBERS OF THE UIRR ON 1ST JANUARY 2002

AUSTRIA	ÖKOMBI Taborstraße 95 A - 1200 Wien	Tel: (+ 43) 1 / 331.56.0 Fax: (+ 43) 1 / 331.56.300 E-Mail: info@oekombi.at
BELGIUM	T.R.W. Avenue du Port, 100 / bte 1 B - 1000 Bruxelles	Tel: (+ 32) 2 / 421.12.11 Fax: (+ 32) 2 / 425.59.59 E-Mail: trw@trw.be
CROATIA	CROKOMBI Vodovodna 20a HR - 10000 Zagreb	Tel: (+ 385) 1 / 364.37.37 Fax: (+ 385) 1 / 364.37.35 E-Mail: crokombi@zg.tel.hr
CZECH REPUBLIC	BOHEMIAKOMBI Opletalova 6 CZ - 113 76 Praha 1	Tel: (+ 420) 2 / 24.24.15.76 Fax: (+ 420) 2 / 24.24.15.80 E-Mail: bohemiakombi@bohemiakombi.cz
DENMARK	KOMBI DAN Thorsvej 8 DK - 6330 Padborg	Tel: (+ 45) 74.67.41.81 Fax: (+ 45) 74.67.07.03 E-Mail: kombidan@kombidan.dk
FRANCE	NOVATRANS 21, Rue du Rocher F - 75008 Paris	Tel: (+ 33) 1 / 53.42.54.54 Fax: (+ 33) 1 / 43.87.24.98 E-Mail: info@novatrans.fr
GERMANY	BTZ Poccistraße 7 D - 80336 München	Tel: (+ 49) 89 / 74.71.48.0 Fax: (+ 49) 89 / 74.71.48.22 E-Mail: info@btz-bimodal.de
	KOMBIVERKEHR Postfach 94 01 53 D - 60459 Frankfurt/Main	Tel: (+ 49) 69 / 79.50.50 Fax: (+ 49) 69 / 79.50.51.19 E-Mail: info@kombiverkehr.de
GREAT BRITAIN	C.T.L. Southwark Street 61 4th Floor UK - London SE1 OHL	Tel: (+ 44) 20 / 7960.0100 Fax: (+ 44) 20 / 7928.7737 E-Mail: info@ctctl.com
HUNGARY	HUNGAROKOMBI Szilagyi Dezso tér 1 H - 1011 Budapest	Tel: (+36) 1 / 224.05.50 Fax: (+36) 1 / 224.05.55 E-Mail: info@hungarokombi.hu
ITALY	CEMAT Via Valtellina 5-7 I - 20159 Milano	Tel: (+ 39) 02 / 66.89.51 Fax: (+ 39) 02 / 668.00.755 E-Mail: info@cemat.it
NETHERLANDS	TRAILSTAR Albert Plesmanweg, 151 NL - 3088 GC Rotterdam	Tel: (+ 31) 10 / 495.25.22 Fax: (+ 31) 10 / 428.05.98 E-Mail: info@trailstar.nl
POLAND	TTK POLKOMBI ul. Lucka 11 PL - 03-842 Warszawa	Tel: (+ 48) 22 / 656.30.51 Fax: (+ 48) 22 / 656.26.41 E-Mail: info@polkombi.com.pl
PORTUGAL	PORTIF Avenida Sidonio Pais, 4-4° - P.3 P - 1000 Lisboa	Tel: (+ 351) 1 / 52.35.77 Fax: (+ 351) 1 / 315.36.13
ROMANIA	ROCOMBI B-dul.Dinicu Golescu 38 RO - 78123 Bukarest	Tel: (+ 40) 1 / 312.23.14 Fax: (+ 40) 1 / 312.17.74 E-Mail: rocombi@incertrans.ro
SLOVENIA	ADRIA KOMBI Tivolska 50 SLO - 1000 Ljubljana	Tel: (+ 386) 1 / 23.45.280 Fax: (+ 386) 1 / 23.45.290 E-Mail: infor@adriakombi.si
SPAIN	COMBIBERIA c/Rafael Herrera,11;2°, Pta 203 E - 28036 Madrid	Tel: (+34) 91 / 314.98.99 Fax: (+34) 91 / 314.93.47 E-Mail: combiberia@infonegocio.com
SWEDEN	SWE-KOMBI Hamngatan 9 S - 231 22 Trelleborg	Tel: (+ 46) 410 / 36.39.00 Fax: (+ 46) 410 / 36.39.29 E-Mail: mail@swe-kombi.se
SWITZERLAND	HUPAC INTERMODAL Viale R. Manzoni 6 CH - 6830 Chiasso	Tel: (+ 41) 91 / 695.29.00 Fax: (+ 41) 91 / 695.28.01 E-Mail: info@hupac.ch
ASSOCIATED MEMBER:		
FRANCE	CNC 8, Avenue des Minimes F - 94300 Vincennes	Tel: (+ 33) 1 / 43.98.40.00 Fax: (+ 33) 1 / 43.74.18.40 E-Mail: continental@cnc-transports.com

