UIRR Report

EUROPEAN ROAD-RAIL COMBINED TRANSPORT

2015-16

UIRR

INTERNATIONAL UNION
FOR ROAD-RAIL
COMBINED TRANSPORT

UIRR
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 Combined Transport through 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 the year

+27

the number of new CT country relations introduced by UIRR members over the last 5 years

In 2010 UIRR CT Operators reported to be serving just 89 direct country relations. Five years later the count stands at 116, or 30% more. A vast majority of these services run along the nine European Rail Freight Corridors. Over the same period Combined Transport became the engine of growth for European rail freight.

The Hamburg-Munich 800km domestic connection tops the list of timetable, or average speed among frequently travelled CT relations. Between Europe and China, over a 12.500km distance, which includes two transhipments, a 10-day transit time is on the horizon that translates into a 50km/h end-to-end timetable speed for CT trains.

107Km/h

the timetable speed of the Munich-Hamburg CT train

-5.1%

the decline of tonne-kilometres realised on domestic connections in 2015

Domestic CT connections, averaging a distance of slightly over 500km, worked the least successfully, delivering a year-on-year decline for the second year in a row. The trend has been accompanied by a gradual increase in average distance from 425km to 505km. Short-haul is where road competition affects CT the most strongly.

2015: small growth masks trends of change

The past year, while delivering small growth in terms of number of consignments forwarded by Combined Transport (+0.75), the output of UIRR CT Operators expanded dynamically by 5.23% when expressed in tonne-kilometres. This result comprises a contraction of RoLa (by nearly 5.5%) and shorter distance domestic traffic (by 5.1%), coupled with robust development of cross-border traffic (+7.6% in tonne-kilometre terms), which includes explosively developing intercontinental CT (+27%) as well.

Subsequently, the average distance travelled by a CT consignment evolved to 882km in 2015, which constituted a 3.6% increase when compared with a year earlier.

Sluggish economic growth of the European economy exacerbated by slowing global trade set the tone of 2015. Consistently low oil prices, not seen since the 1986-2004 period, led to freight rates that placed CT margins under pressure, whereas the corresponding costs of rail transport did not decline, but rather increased.

Report of the President

European Road-Rail Combined Transport (CT) closed a year advancing moderately in terms of number of consignments (+0.75%), while impressive growth was realised in tonne-kilometre terms (+5.23%). The development of UIRR, the sector's industry association, has progressed well with the joining of 7 new members and the conclusion of several Memoranda of Understanding with peer organisations active on a Member State level.

CT performance

The European Combined Transport sector and its actors, represented by UIRR, continued in 2015 the trends that characterised the previous year: a small advance in the total number of consignments forwarded, while delivering an impressive performance when measured 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 expanded to 882km.

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.

The legislators' attention should focus on the earning ability within the CT sector, especially in light of prevailing diesel prices last seen well over a decade ago, which heavily favour road competition. Freight rates, driven by the dominant road hauliers, must enable a cash-positive functioning of Combined Transport. If needed, temporary compensatory measures should be applied by Member States to ensure that private capital continues to be motivated to invest into Combined Transport.

Developments to the Regulatory Framework

Several major pieces of legislation were brought to successful conclusion in 2015, which could impact the operating environment of Combined Transport:

- The revision of Directive 96/53 on the weights and dimensions of commercial road vehicles was ultimately agreed.
- The compromise needed to enact the Fourth Railway Package was reached.
- The Implementing Act on track access charge calculation for the rail sector was adopted.

Obviously, a lot remains to be done to bring daily practice in line with these new rules, hence the impact can not be expected immediately, nevertheless the direction of the passed legislation is encouraging.

On the other hand, very little has been accomplished when it comes to correcting the regulatory imbalance that prevails between the various competing modes of freight transportation. The proliferation of the *user pays* and the *polluter pays* principles (revision of the Eurovignette and the Energy Taxation directives) is a major task awaiting the European legislator.

The anticipated 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 progressed as the REFIT (Regulatory Fitness) procedure was finally concluded with the publishing of the Implementation Report on 20 April 2016.

"In 2015 European Combined Transport continued the trends that characterised the previous year: a small advance in the total number of consignments forwarded, while delivering an impressive performance when measured in tonne-kilometres."

Ralf-Charley Schultze, President

Achievements of 2015

UIRR was very actively participating in the dialogue concerning the directions to pursue when aiming to refine the regulatory framework of freight transportation. Unfortunately, DG MOVE has not offered a single legislative draft relevant to overland freight transport in 2015.

The Last Mile Study, a project financed by the EU, was brought to success with UIRR's active participation. The railfreightlocations.eu portal - developed under the Study - is a single source of vital information on freight terminals, points where freight can enter or leave the European railway network. This information is vital when organising Combined Transport train connections.

Proliferation of the ILU-Code, administered by UIRR, has further evolved as over 95% of consignments were found to be identifiable by either the ILU- or the BIC-Code by the end of 2015. This result provides a solid foundation for the development of productivity enhancing IT solutions in Combined Transport.

Development of the Association

In the period 2015-16 UIRR inaugurated 7 new members into the association:

- four CT Operators (Ambrogio Trasporti, IMS, T3M and RCO CSKD), two of whom also manage CT terminals, and
- three CT Terminals (ÖBB Infra/Terminal Service Austria, Rail Cargo Terminal BILK, Railport Arad).

Memoranda of Understanding were signed with associations actively promoting Combined Transport on a Member State level: Combinet of Austria, GNTC of France, as well as IBS and SGKV of Germany.

A platform to regularly coordinate with manufacturers of CT equipment was launched and UIRR's first Partnership Agreement has been signed with VTG/AAE.

UIRR joined the European Logistics Platform, while continuing with intense activities towards several European and International bodies, as well as participating in European Commission working groups.

In 2015, for the first time in its history, UIRR participated with a stand in the biannual Transport Logistics Exhibition in Munich, together with MoU peer, IBS.

Outlook and expectations

The UIRR Combined Transport Sentiment Index stood unchanged at "neutral". 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 necessary to deliver the modalshift objectives of the Transport White Paper. These are indispensable to ensure that European long(er) distance freight transport follows a sustainable path of development and thereby contributes to the competitiveness of the economy, while also making Europe a better place to live.

European CT

CT Operations Members' News

European Combined Transport (CT) operations developed well over the course of 2015: traffic grew by 0.75% in terms of consignments and by 5.23% when measured in tonne-kilometres as compared to a year earlier. Intercontinental and cross-border unaccompanied CT grew most dynamically at a rate of 3.78% and 7.55% as expressed in number of consignments and tonne-kilometres respectively. On the other hand domestic relations and accompanied CT (RoLa) declined at the rate of +/- 5%.

Unaccompanied Combined Transport

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

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, BoxTango, 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 12-17.

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 the various modes of transport. 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 (RoLa), 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 low land-use of rail transport, which - through tunnelling - lends itself well 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 WBN operated on several Trans Alpine routes,
- The Lorry Rail connection between Orbassano (Torino) Aiton (Lyon), and
- The Channel Tunnel shuttles.

Efficient electric traction and attractive average speed of rail travel complement the positive traits of competitive accompanied CT. This specialised form of Combined Transport makes up about 5% of the output performance of UIRR Operators.

Road competition is most intense towards this type of Combined Transort.

Developments in 2015

- **Unequivocal growth of cross-border unaccompanied CT:** the 3.78% year-on-year growth in terms of consignments and 7.55% when measured in tonne-kilometres was achieved in spite of strikes and maintenance works that both disturbed the smooth flow of rail traffic in Germany, a country essential for most East-West and on several North-South relations.

  New country relations were established over the course of the year, which promise additional growth in this segment. 84% of CT tonne-kilometres were realised on cross-border relations in 2015.

- **Robust expansion of intercontinental CT:** the 44% year-on-year growth in terms of number of consignments and 27% when measured in tonne-kilometres was attributable to the substantial quality improvements achieved thanks to significant infrastructure investments in mostly Russia.

  Market players are gradually discovering the advantages of intercontinental CT, which is much faster than deep-sea shipping, yet significantly cheaper when compared to air cargo. CT trains to and from Western China make Europe especially cheap and easy to reach.

- **Contraction of shorter-haul unaccompanied CT:** the nearly 5% reduction in this type of CT traffic is attributable to two phenomena. Road hauliers, aided by historically low fuel prices, pose the greatest competition on these relations. Prematurely reduced national support schemes also contribute to the deterioration.
  Longer distance domestic relations, on the other hand, tend to fare better, which is reflected in the relatively high average distance of this type of traffic: 505km, compared to little over 400km achieved 5 years ago.

- **Weak performance by RoLa (Accompanied CT):** the 5.55% decline year-on-year, as well as the barely over 5% overall share may be explained by four parallel circumstances: the limited train path availability in the Western Alps, uncertainties around the legality of the Tyrolean truck ban affecting the Brenner Pass, the historically low diesel prices which are not matched by rail and the missing statistics figures of some important RoLa operators not being UIRR members so far (i.e. Europorte, Viia and Rail Cargo Operator of Austria).

Member's Comment

LIVIO AMBROGIO
Chairman & CEO
Ambrogio Trasporti

The distinctive feature of Ambrogio Trasporti as a continental intermodal operator is a door-to-door service, covering the entire transport chain. This is supported by ownership of railcars, UTIs and a network of terminals, which allows a better economic perspective of the market if compared to a partial evaluation of just rail section data or the sheer figure of UTI transhipment.

The year 2015 has shown a rebound after a long lasting crisis. Traffic towards Northern Europe increased by 3.8% with Germany and 4.1% with Benelux. Traffic with Spain decreased by 6.1%, due to persisting problems such as inadequacy of the Turin-Lyon corridor and the delays caused by track maintenance on the RFF network. Competition by road and subsidized RO-RO service between Italy and Spain forced Ambrogio Trasporti to reverse modal shift, i.e. putting rail traffic back on the road.

Cheap energy has benefitted all transport modalities (road, maritime and air) except railways. RUs have been so far unable to come to terms with an uncompetitive cost of infrastructure and traction electricity, amounting to 30% of the train-cost and governed by national policies. Contradicting the EU's strategic aims of promoting, as much as possible, rail and intermodal transport.

Severe shortcomings of this aspect of harmonization form the single biggest danger that rail/intermodal operators are facing today. The small improvements (coming after seven bad years) are deceiving: if no correction is brought about to the distortion of the market playing field where citizens and business are relieved by decreasing costs, in contrast to RUs and IMs having increased their prices in the last years, untouched by the general deflationary trends.

The condition of constant uncertainty is proving very harmful to investment strategy, fleet renovation and terminal construction, thus inadvertently strengthening the road sector and its dangerous "technology" lobby favouring mega-trucks, whose direct effects could materialize too quickly for us to react.

"European Combined Transport (CT) operations developed well over the course of 2015: overall CT traffic grew by 0.75% in terms of consignments and by 5.23% when measured in tonne-kilometres as compared to a year earlier."

Obstacles to CT's development

Infrastructure: mostly rail-related shortcomings hold back the development of Combined Transport.

- **Bottlenecks:** profile gauge-, train length- and maintenance backlog-related limitations hinder the productivity of CT trains.
- **Uncoordinated infrastructure works:** Rail Freight Corridors (RFC), aiming to solve the problems of cross-border rail freight, have yet to deliver tangible results in the coordination of works, which has become a challenge due to the passenger focus of national infrastructure managers and the uncertain funding for maintenance works.
- **Lack of train paths and traffic priority:** passenger transport enjoys unparalleled priority on rail, coupled with a lack of infrastructure capacity, which means that the number of trains desired to be run by CT Operators can not be accommodated on the infrastructure. Cancellations by infrastructure managers are rampant and the quality performance, when measured in end-to-end punctuality, is lacking.

Regulatory shortcomings: diverse (operational and safety-related) national rules, heterogeneous interpretation and implementation of existing European law and outdated or missing legislation translate into obstacles.

- **Divergent national rules:** rail-related national rules are being weeded by the European Union Agency for Railways (under a mandate contained in the Fourth Railway Package), other applicable rules related specifically to Combined Transport remain undisturbed.
- **Missing or inadequate EU-level rules:** outdated European energy taxation rules do not allow the superiority of renewable electricity (used by trains) to be expressed in comparison to fossil fuels, such as diesel. Regulations concerning infrastructure charging are similarly problematic resulting in unexplainable differences from Member State to Member State.

  The regulatory framework of intermodal transport is patchy and outdated; several components are missing, while others are lacking the necessary detail to form a reliable and transparent legal setting for Combined Transport.
- **Lack of standardisation:** technical standards and administrative procedures need to be harmonised. Paperless solutions must be introduced within the Single Market, not only on the borders (by the new Customs Code).

  The standards for the CT reference wagon, used in codification of railway lines (profile gauge), and the semi-trailer envelope need to be (re)defined.

  New standards are needed for pallet-wide 45-foot swap bodies and containers.

External obstacles: security circumstances in two relations - east- and southbound - affect CT performance adversely.

- **The migration crisis:** national countermeasures have made the passage of freight trains through the Balkans (in the direction of Turkey) very unreliable. Awkwardly, the same crisis had a negative effect on Channel Tunnel rail traffic to/from the United Kingdom.
- **The Ukraine crisis:** resulted in the shutdown of the eastbound transit routes through Slovakia and Hungary.
- **The sanctions against Russia:** caused a drop in trade, whereby European goods were not anymore transported to Russia in previously seen quantities.

Regulatory changes needed

Combined Transport needs the intervention of politicians to correct the inadequacies in its regulatory and operating environment.

Considering the state ownership of rail infrastructure, politicians' actions are needed to overcome the deficiencies in investment, maintenance harmonisation as well as operating and priority rules. Regulatory shortcomings self evidently require politicians' intervention in their legislative capacities. Finally, external problems must be solved by diplomacy, also under the responsibility of politicians.

Combined Transport will only be able to prosper and to fairly compete within the European land freight transport market if the politicians exercising the relevant powers can deliver on the tasks entrusted onto them by society.

News from Operator Members

ADRIA KOMBI
The Slovenian CT Operator, which works closely with the Port of Koper, realised a setback both in terms of consignments (-8%) and tonne-kilometres (-9%) during 2015 due to infrastructure-related disturbances in Slovenia and the difficulty of crossing the Balkans. The RoLa service of Adria Kombi struggled on the same grounds.

ALPE ADRIA
The Trieste-based CT Operator, whose activities are strongly linked to the Port of Trieste, achieved an overall positive performance in consignments and robust growth in tonne-kilometres, mainly attributable to their longer distance cross-border trains, while domestic connections turned into a weaker performance.

AMBROGIO TRASPORTI
The Italian CT Operator, which also manages several terminals, achieved an outstanding performance both in consignments and in tonne-kilometre terms based on its unique door-to-door business model using 45-foot containers operated exclusively on cross-border relations.

BOHEMIAKOMBI
The Czech CT Operator - defying the trends - started up domestic services in 2015, while suffering a minor setback on its cross-border connections.

CFL INTERMODAL
The CT Operator of Luxembourg delivered convincing growth in 2015, which will be needed as its parent company plans to open the extension of the Bettembourg terminal in late 2016.

CEMAT
The dominant CT Operator of Italy realised a minor reduction in its cross-border traffic performance, while suffering a slightly larger contraction on domestic connections.

COMBIBERIA
Based on its cross-border relations, the Spanish CT Operator delivered stable growth in 2015 both in terms of consignments and tonne-kilometres.

CROKOMBI
The Croatian CT Operator, which is presently undertaking a major terminal investment near Zagreb, realised a stable performance on cross-border relations.

FAR EAST LAND BRIDGE
The intercontinental CT specialist headquartered in Vienna, delivered convincing growth of nearly 70% on its services to and from China and other Far East destinations over the course of 2015.

FELB POST

FAR EAST LAND BRIDGE LTD. ILLUSTRATED NEWSPAPER

Monday, February 15, 2016

120 KM/H ON THE RUSSIAN STRETCH

WILL THIS ALSO IMPROVE TRANSIT TIME OF FELB'S SERVICE?

Reduction from 14 to **10 days terminal-to-terminal service** between Asia and Europe is identified as a new ambitious goal within the Russian Railway Group.

For the first time, wagons in Russia will be able to carry out transports at the speed of 120 km/h, loaded or empty. As the wagon manufacturer Altaivagon has been granted approval for the Type 13-2114-11 container flat wagon design with 18-2145 bogies, TransContainer prepares to use this new type of container wagons on the Moscow – St. Petersburg route.

The approval and the upcoming production are the result of collaboration with Russian Railways (RZD). The modelling and projecting went smoothly – only minor changes in the braking system were required to reach the new speed, Altaivagon reports. Ultimately, this is one more important step towards the reduction of transit time and maintenance costs.

The transit time development of FELB's railing service between Asia and Europe improved gradually from 26 days to 22 days in 2010; from 22 days to 20 days in 2012 and from 16 days to 14 days in 2014. With the arrival of the 120 km/h wagon in Russia, FELB will be able to reach a transit time of only 10 days in the nearest future.

FELB

HUPAC

The Swiss CT Operator and terminal managing company, which offers one of the most comprehensive CT networks in Europe, delivered a stable overall performance, in spite of some losses on domestic connections that were balanced out by cross-border performance.

INTERFERRYBOATS

The Belgian CT Operator, which also manages several terminals, delivered a stable overall performance. This comprised a major contraction suffered for the second year in a row on its domestic network, caused by the loss of state subsidies, and an impressive growth achieved on cross-border relations.

IMS

The Austrian CT Operator, which recently joined UIRR, closed a successful year in 2015. Its traffic convincingly expanded both on the company's domestic and cross-border connections.

KOMBIVERKEHR

The largest European CT Operator headquartered in Frankfurt, Germany, while frustrated by both extensive railway strikes and maintenance works on the German network, delivered an unequivocal growth on both its domestic network and cross-border relations.

NAVILAND CARGO

The French CT Operator and terminal managing company, specialising in providing hinterland connections to and from French ports towards France, Belgium and The Netherlands, suffered a contraction both on its domestic and cross-border lines due to a reduction in the number of containers arriving to and departing from French ports.

NOVATRANS

Following a reorganisation carried out by its new owner, GCA, the French CT Operator and terminal managing company delivered a stable performance in 2015, where a minimal contraction in consignments was compensated by an improvement in tonne-kilometre terms.

POLZUG

Competition from road hauliers, aided by the historically low diesel price, played a substantial role in the losses suffered by the Polish CT Operator and terminal manager on both its cross-border connections and its domestic feeder/distribution network in 2015.

RALPIN

The Swiss Rolling Highway specialist delivered a stable performance in 2015. With capacity utilisation peaking, RAlpin can only grow its traffic if new train paths will become available. The low diesel price acts as a counter-motivation for the use of RoLa services.

ROCOMBI

The Romanian CT Operator and terminal managing company performed well on domestic relations, which besides terminal management became its sole operational activity in 2015.

TRANS EURASIA LOGISTICS

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

T3M

The French CT Operator and terminal managing company, whose activities have been dominated by domestic traffic, has been focusing on developing its cross-border network. The recently joined member of UIRR has delivered a stable performance in 2015.

CT Terminals

Terminal Performance Members' News

European Combined Transport (CT) terminals are the interfaces, which connect the various modes of transport that perform CT transport chains. UIRR members managed 54 terminals in 2015, 40% 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 shortsea navigation vessel.

The Situation of Terminals

Several entities may own and operate CT Terminals, including rail infrastructure managers, railway undertakings, CT Operators, port authorities, dedicated terminal management companies, 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 of transhipment terminals means that they constitute a unique category of transport infrastructure.

Terminals may be managed by a similarly diverse range of entities, including state or municipally owned, as well as 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 private sector terminal management entities.

In case public funding is used when developing a terminal, irrespective from the ownership of the entity that manages it, the terminal must provide "open access" to its facilities.

CT Terminals serve as a gateway for freight to 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 are 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 their immediate vicinity.

Regulatory Framework of Terminals

Transhipment terminals are not regulated in most member states in spite of their strategic role. This is perhaps reflecting the diversity of their ownership, their scope of activities and their management. There are three EU legislations which mention CT terminals:

- Freight terminals are mentioned as one type of *essential facility* in the Single European Railway Area Directive (34/2012). The Directive contains some basic principles to the functioning of terminals, however more will only be known of its implications after the Commission Implementing Act on Access to Essential Facilities is adopted, which is not expected before 2017.
- The Rail Freight Corridor Regulation (913/2010) mentions transhipment terminals when requiring so-called *Corridor Terminals* to align their slots with pre-arranged train paths. Also, Corridors are required to publish information on Terminals which provide access to their infrastructure.
- Finally, the revised TEN-T Guidelines and the Connecting Europe Facility (Transport) regulations - adopted in late 2013 - contain provisions declaring terminal development as an eligible cause for EU financial support.

Neither of the aforementioned EU legislations makes it their aim to provide a much needed harmonised regulatory framework for CT terminals. The lack of a European definition for *"open access terminal"* for instance, as well as the conditions that they must fulfil, creates an uncertain situation.

While the current largely unregulated environment has probably contributed to the development of transhipment terminals, the dynamically expanding cross-border CT services present an increasing need for a harmonised legal framework. The differences in the conditions for accessing terminals are emerging as an obstacle to devising new CT connections.

The CT Terminal Product

The essential service of a CT Terminal is the facilitation of transhipment of the intermodal loading unit 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 and the trucks exiting with outbound cargo may also be controlled for weight. The client of the terminal for this service is most often the CT Operator 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, weighing, 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 as well as live force. Terminals must also be ready to handle and safely store loading units containing dangerous goods.

Active contribution to the efficient organisation of last mile transport, whether by rail or by truck, is also an important priority for terminals. 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 (the entry point to the main lines) 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 transport providers.

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

FRANCESCO PARISI
CEO
EMT

Member's Comment

EMT was established after the award of a 25 years concession (2010-2034) by the Port Authority of Trieste based on a privately financed project undertaken to transform an infrastructure designed and built in the first half of the last century into a modern marine terminal. Efficient interchange between sea and rail transport of cargo unitized in modern transport equipment could only be ensured this way.

The capacity of the terminal has been mainly utilized by Ro-Ro marine services linking the eastern Mediterranean region, primarily Turkish and Greek ports, to Trieste in trades that originate or end 75% of the time north of the Alps. EMT filled the lack of appropriate infrastructure to allow long-distance transport of intermodal units to be transferred immediately from the sea voyage to unaccompanied rail transport and vice versa. This more advanced and sustainable CT solution was promoted by logistics business pioneers from Turkey and from Germany starting with one weekly train in the year 2008.

Last year EMT handled 80.000 (45ft equivalent) units by sea (+25% compared to 2014) and 70.000 by rail (+4% compared to 2014) equal to 1361 train circulations. The reasons for this good performance lies primarily in the combination of speed and reliability, which makes this solution competitive compared to alternative routes, as confirmed also by the rising volumes of the first quarter of 2016.

The Terminal operates 24/7 and the following destinations/origins are served, some of them with more than one daily train: Cologne, Frankfurt, Ludwigshafen and Munich in Germany, Bettembourg in Luxembourg and Ostrava in the Czech Republic. This year a new service to Novara, Italy, just started. Most units are craneable trailers but utilization of standard containers, 45ft swap bodies and tank containers is steadily rising.

"EMT filled the lack of appropriate infrastructure to allow long-distance transport of intermodal units to be transferred immediately from the sea voyage to unaccompanied rail transport and vice versa"

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 direct 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 aim to 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 alternative to long(er) distance road haulage. Optimisation, transparency and accountability with regards to the carbon footprint, energy efficiency and ultimate environmental performance of terminals is 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 pro-actively 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, if they operate in a country with a long history of Combined Transport or one just learning this trade.

External Support to Terminals

CT terminals are strategically important infrastructures, as they are the enablers of the Combined Transport alternative to long(er) distance trucking for relatively smaller quantities 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 rely on outside advice and support, which may be most efficiently obtained through interaction with one another in their industry association or professional groups, as well as purchased 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 credibly not-for-profit provider of support services like a wagon and loading unit register, General Terms and Conditions for European CT terminals, or as a 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 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.

News from Terminals Members

AMBROGIO TRASPORTI
The family-owned Italian CT Operator manages several terminals, while owning stakes in a number of others. The handling performance in these terminals developed in line with the operations performance of Ambrogio Trasporti over the course of 2015.

RAIL CARGO TERMINAL - BILK
The CT terminal of Budapest, built as the first such facility in the Hungarian Capital, was purchased by Rail Cargo Austria as part of its acquisition of MÁV Cargo in 2008. The CT terminals that belong to RCA outside Austria were recently organised into the entity: Rail Cargo Terminal. The number of units handled at BILK increased by 5% in 2015.

COMBINANT
The Combinant Terminal, owned by a consortium of Hupac, BASF and Hoyer in the Antwerp Port area, delivered a near 5% growth in 2015.

CTE/CTS
The recently opened terminal of Enns is the second such transhipment facility - besides the long existing terminal in Salzburg - that belongs to the Kaindl Group. In 2015 growth of over 3% was achieved in the state-of-the-art CTE facility, while CTS is close to its maximum capacity.

HUPAC
One of Europe's largest CT Operators - based in Switzerland - operates seven terminals in Switzerland, Italy, Germany and Belgium. The number of units handled at Hupac terminals declined somewhat over the course of 2015 as compared to a year earlier.

INTERFERRYBOATS
The Belgian CT Operator manages five terminals in Belgium - concentrated in the Antwerp area - as well as possesses stakes in a number of other terminals. The IFB terminals realised a solid year-on-year growth in the number of handled units during 2015.

LUGO TERMINAL
The Italian terminal manager, besides a number of other businesses, runs two CT transhipment facilities: one in Lugo and another near Bari in the South of Italy. Lugo realised robust growth last year on the number of units handled at both of its terminals.

NAVILAND CARGO
The CT Operator, which specialises in port hinterland transport in France, manages seven terminals across the country, some alongside its domestic peer Novatrans. In line with the CT train operations of the company, the seven terminals achieved a flat overall performance in 2015 - which masked significant shifts of volume from one terminal to another.

NOVATRANS
The CT Operator owned by GCA and headquartered in Paris operates six terminals across the country, some of which are operated alongside with Naviland Cargo. Novatrans terminals performed similarly, delivering no meaningful year-on-year change.

ÖBB INFRA - TERMINAL SERVICE AUSTRIA
The specialised manager of CT Terminals owned by ÖBB Infrastructure, Terminal Service Austria, handles the management of eight terminals in the country. The recently joined Terminal Member of UIRR is presently undertaking the major development project to construct the Freight Center Vienna South Terminal (Inzersdorf), a large scale state-of-the-art transhipment facility for Combined Transport, co-funded by the EU and scheduled to be completed by the end of 2016.

POLZUG

The Polish CT Operator also manages four terminals across the country. The Poznan Hub Terminal functions as the centre for an elaborate domestic CT distribution network. The number of units handled at Polzug terminals in 2015 declined, mirroring the weaker performance of Polzug's CT operations.

RAILPORT ARAD

The manager of a major CT terminal in Western Transylvania, Railport Arad recently joined UIRR. The Romanian terminal, close to the Hungarian border, is presently undertaking a major expansion project that will double its capacity by early 2017.

JOHN G RUSSELL TRANSPORT

The Scottish family-owned transport company committed to Combined Transport among its various activities also operates a number of CT Terminals. Reacting to the difficulties surrounding the Channel Tunnel - attributable to the migration crisis - Russell's contract to manage the Barking Terminal had to be suspended over the course of 2015. Hence the company remains a Terminal Member of UIRR based on its recently opened facility in Dirft, near Birmingham.

T3M

The French CT Operator T3M also manages several terminals in the country. The recently joined member of UIRR delivered stable performance in 2015.

ROCOMBI

The Romanian CT Operator and terminal managing company took over management responsibilities for the Bucuresti Sud Terminal. The performance of the terminal was positive following the operations growth realised by Rocombi on domestic relations during 2015.

Business
Environment & Outlook

Regulatory framework Business outlook

The business environment of road-rail Combined Transport became strained due to a number of external phenomena: the collapse of the oil price, a migration crisis of historic proportions and an unforeseen slow-down in global trade in 2015. This was exacerbated by the surprising unwillingness of EU Member States to levy the fair cost of road infrastructure operation, traffic management, upkeep and development onto road users, and to support the revision of the 13-year-old EU Directive on energy taxation.

Global forces at play

Several adverse developments formed the landscape of Combined Transport in 2015:

- A prolonged depression in the price of oil - last seen between 1986-2004.
- A migration crisis, which caused the shutdown of the transport routes crossing the Balkans and severely disturbed rail traffic between the Continent and the United Kingdom (through the Channel Tunnel).
- A security crisis involving Russia, which effectively resulted in the closing of the Eastbound transit routes through the Ukraine.
- The unforeseen slowdown of global and Chinese economic activity coupled with the advent of mega container ships, which concentrated the shrinking container traffic into the largest ports.

Adverse developments in Europe

Local disturbances also tainted the business environment of Combined Transport over the course of the year:

- Railway strikes have led to major traffic disruptions, resulting in the loss of a substantial number of train paths, causing extensive train cancellations.
- Works along key railway lines - attributable to a backlog of years of delayed maintenance and exacerbated by booming (public service) passenger traffic - have resulted in a narrowing access of freight trains to the rail network.
- A Europe-wide trend of unexpected stagnation or even reduction in road toll levels offered an unforeseen leeway to road hauliers depressing freight rates; reductions which can not be matched by Combined Transport as traction electricity costs and track access charges are both defying deflationary trends - and continue to steadily increase. Hopes for fiscally pressured Member State governments to be flocking to introduce fairer distance-based tolling (phasing out vignette schemes), with a few exceptions, did not materialise either.

Opportunities going forward

While there are numerous negative phenomena at play, the European Combined Transport sector has its mind set on the service that it can deliver, to help society solve some of its gravest concerns:

- Reduction of greenhouse gas emissions from transport, which are a major cause of global warming.
- Performing the overland transportation of significant quantities of cargo over prolonged distance using not only as little energy as possible, but of the mostly clean, renewable type.
- Elimination of death and grave injury caused by traffic accidents that predominantly occur on road.
- Meaningfully contributing to the reduction of congestion and local pollution of PM10, ozone, noise and vibration near to inhabited areas.
- Offering jobs that enable employees to have acceptable living conditions such as sleeping at home every day, seeing children grow up, the ability to regularly meet and interact with friends (as opposed to the fate of long-distance truck drivers).

The Commission Work-Plan of 2016

The only European legislative output of 2015 relevant to Combined Transport was the Commission Implementing Regulation 2015/909 concerning the rules involved during the calculation of track access charges. This was drafted by the Commission on the authority of the Single European Railway Area Directive (2012/34). The mitigation of the extreme range of track access charges applicable today (from €0.13/train-km for a 1000 gross tonne freight train in Spain to €9.97 for the same in Lithuania) is expected as a result. The unpredictability of year-on-year track access charge increases - a major headache for rail freight users - is expected only to be indirectly impacted by the Implementing Regulation.

The Juncker Commission, under the Good Governance Initiative championed by First Vice President Frans Timmermans, has considerably slowed down the European Union's legislative machinery. The fate of amending the Combined Transport Directive (92/106) is a prime example: the Juncker Commission inherited a completed public consultation and consultants' study on the topic when coming to office. The REFIT Procedure launched in place of the procedure to amend the Directive, which would have otherwise begun in the second half of 2014, was only concluded on 20 April 2016 - constituting a 2-year delay. The CT sector can only hope that these two years will be reflected in the quality of the amendment that will hopefully come within the Commission's 2017 work-plan.

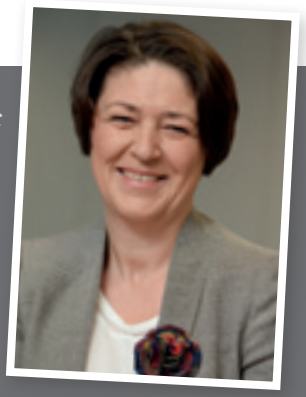
The delays observed with regards to the emergence of the legislative drafts that should comprise the Commission's *Road Initiative* (previously referred to as the "Road Package") cause more concerns. All the more so as the College of Commissioners decided to withdraw several inherited amendment proposals, including the one pertaining to Directive 2003/69 on energy taxation.

UIRR places this legislation very high on its list of priorities as energy taxation reform is the obvious way to internalise CO_2 emissions in a market conform way.

Superb progress has been noted on another inherited subject: the Fourth Railway Package. The work diligently shepherded by the Commission under the Italy-Latvia-Luxembourg Council Presidency trio, will likely be closed under the current Netherlands Council Presidency. The legislators have achieved a sensible common ground on the Technical Pillar and a still acceptable compromise on the Political Pillar. Subsequently, the much awaited Fourth Railway Package will most likely become law before the end of 2016.

Commissioner's Comment

VIOLETA BULC
Commissioner for Transport



For almost 40 years now, the European Union has been promoting Combined Transport as a means to reducing adverse effects of long-distance freight transport: pollution, CO_2 emissions, increasing oil dependency, congestion and accidents.

Combined Transport has grown considerably over past decades, but the agenda has not changed. To the contrary. Shifting long-distance freight transport from road to rail, inland waterways or short sea shipping becomes ever more important. Demand for long-distance freight transport is growing and will be growing further with the integration of Europe into global value chains. At the same time, transport must contribute to the Union's efforts to curb greenhouse gas emissions and reduce other externalities it causes.

Against this background, the European Commission has evaluated the Combined Transport Directive adopted in 1992. The evaluation report concludes that the Directive has supported modal shift and helped save up to 2 billion euros in external costs. It also concludes that we can make the Directive more effective and efficient. For instance, we could simplify eligibility criteria, revamp economic support measures or promote the use of digital transport documents to make Combined Transport fit for the future.

To test these different options, the Commission will run public consultations in the coming months and I invite all UIRR members to actively participate. Your knowledge and experience are critical to finding solutions that work in your daily business and produce modal shift without excessive cost. With the Fourth Railway Package nearing adoption and the Road Initiatives under preparation, this is the time to give new momentum to Combined Transport. My Commission colleagues and I are looking forward to working with you!

"For almost 40 years now, the European Union has been promoting Combined Transport as a means to reducing adverse effects of long-distance freight transport: pollution, CO_2 emissions, increasing oil dependency, congestion and accidents."

The means of CT Operators

Combined Transport is organised mainly 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 (under the dominant influence of road hauliers). Even if rather limited, CT Operators have a range of measures at their disposal through which they can 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 reduced costs;
- **Identifying clever investments** that boost capabilities; and
- **Promoting Road-Rail Combined Transport** towards decision-makers to inform them of the potential of this innovative system of freight transport; and getting their support for the necessary corrections of the regulatory framework conditions leading in a fairer direction.

Investments, Research and Development

Investment should be the easiest thing these days, especially if one looks at the extreme low interest rates and the desperate attempts of various government bodies, including the European Commission, to induce it.

The Bruegel Institute put it in its paper published in October 2014 titled "Infrastructure investment is a no-brainer": "For countries with infrastructure needs, the combination of low interest rates and mediocre growth means that it's time for an investment push."

Investment, however, is not only a matter of interest rates. Banks will only lend if and where there is earning ability promising the ability to repay, and if there are assets that can be collateralised.

Rail infrastructure does not qualify for this. The margins of value added railway services are under pressure, track access charges can not be further increased and most Member States of the European Union have exhausted their borrowing ability.

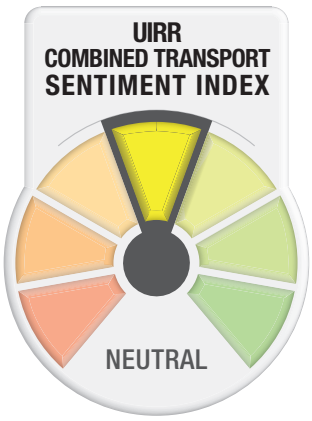
Yet we must not forget that prior to the Great Depression of 1929-33 rail investment was a desirable and highly profitable undertaking for the European financial sector. Moreover, we have been seeing tens of billions of dollars invested into railways in the USA or Canada. Similar magnitudes are spent on railway research and development in Japan and in all capitalist democracies. The European financial sector is desperately seeking stable and safe long-term investments today, investment opportunities, which the rail sector could handily provide. But it does not.

This situation, this opportunity, poses an important challenge to the European Union: can the legal structure be found to reinstate the earning ability of the rail sector to enable it to absorb the many hundreds of billions of euros it needs, yet it can not get access to.

Will the European Commission be able to take the thirsty camel to the overflowing stream for the drink it needs to quell its thirst?

Business Outlook

The UIRR CT Sentiment Index will remain "neutral" for the 12-month period ahead, reflecting on the European CT Sector's search 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. On the other hand, the creation of a uniform regulatory framework for Combined Transport throughout the European Union could be a very useful step.



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 achieved through promotion, enhancement and support of European CT.

Small team - intense activity

The five-member-team of the UIRR office coordinates the activities of dozens of member experts together with whom an active participation is provided in every relevant European-level working body for Combined Transport.

UIRR Interest groups are of key importance to discuss matters with members grouped into

- Operations,
- Terminals,
- Technical,
- Dangerous Goods,
- ICT and
- PR & Communication.

From left to right: Ralf-Charley Schultze, UIRR President, Violeta Bulc, EU Commissioner for Transport, Rok Svetek, CEO of Adria Kombi and Member of UIRR's Board of Directors

Besides conventional face-to-face communication, travelling, making personal appearances, speeches and participating in professional panels. UIRR also develops written materials offered on its website to reflect positions, organises events and uses advanced solutions such as videoconferencing.

Highlights of the year

UIRR participated in the Transport Logistic Exhibition in Munich on a stand shared with German MoU peer, IBS. This allowed the UIRR team to make contact efficiently with a wide spectrum of stakeholders, members and member candidates, technology suppliers and peers.

The Annual General Assembly featured a unique consultation of UIRR CEOs with a high level member of Transport Commissioner Violeta Bulc's Cabinet. A reinforced and intense dialogue, followed by meaningful collaboration with the European Commission is the only way to carry out the mission of UIRR.

An event of Rail Forum Europe, a group that organises exchanges between rail sector stakeholders - including UIRR - and members of the European Parliament's Transport and Tourism (TRAN) Committee, was co-hosted by UIRR to discuss the issues of track access charging.

The UIRR team - from left to right: Eric Feyen, Technical Director, Pekiye Bicici, Assistant to the Management, Ralf-Charley Schultze, President, Barbara Bento, ILU-Code Coordinator, Ákos Érsek, Chief Policy Advisor

Promote

- Written promotion: 13 press releases, 3 position papers and studies, 4 newsletters and the annually published UIRR Report.
- Internet: UIRR's well-visited website - www.uirr.com - saw the number of visits increased by 28% year-on-year; the professional group on LinkedIn also saw consistent increase in membership.
- Personal promotion: appearance and intervention at 77 public events, conferences and working groups; more than 300 one-on-one meetings with EU parliamentarians and Commission and Council officials, sector stakeholders, as well as shippers and consignors.
- First ever appearance of UIRR at the Munich Transport Logistic Exhibition with a stand shared with German MoU peer, IBS.

Enhance

- Finalisation of the EU projects "DESTINY" and "EcoHubs"
- Material contribution to the revision of UIC leaflets that concern Combined Transport.
- Renewal of the collaborative forum of railway undertakings 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.
- Input to the Commission study on best practice on confirmation measurement of railway profile gauge.
- Establishment of platform to systematically collaborate with loading unit manufacturers.
- Active participation in CEN TC119 Working Group addressing combined transport topics; nomination to secretary of one of its two subgroups.
- Participation in Single European Railway Area Conferences and Working Groups, nomination as coordinator of KPI for freight development subgroup (RU dialogue).
- Nomination as the Coordinator of Terminal Advisory Group speakers of Rail Freight Corridors.

Support

- ILU-Code: increased the number of registrations by 22% over the previous year; this contributed to an ILU- or BIC-Code compliance of over 95% of CT consignments by the end of 2015.

Partner's Comment

MATTHIAS KNÜPLING
Head of Business Development
VTG/AAE

Rail freight transport in general and intermodal transport in particular should have good chances of growth in the coming years and decades. However will we really be experiencing this so?

Many political and technical obstacles still hinder the sector from moving freely and flexibly on rail in Europe. The Fourth Railway Package was supposed to free the way for a rail freight transport for which it had to be easier to gain ground in terms of competitiveness vis-a-vis road. On the technical side, there seems to be progress, nevertheless the political pillar gives little cause for hope. Railway undertakings are apparently given freer access, practice will show if the infrastructure undertakings will really grow more independent of their Group companies.

Various train protection systems on the main corridors, language skill requirements of train drivers and further land-specific requirements need to be urgently harmonized on the technical level.

And then new slogans appear on the horizon: Freight Transport 4.0 and Digitalization. Does everyone dealing with these keywords understand their meaning? Can addressing these slogans bring the breakthrough? Increased transparency for the shippers, in order to know the status of their loading any time, and to be able to fully integrate the transport on rail into the logistics chain?

These are important wishes, which those must face, who take care of the rolling stock. Modern wagons, almost maintenance-free, are readily available, equipped with the instruments, which provide the users with all the information they need for the transparence in their logistics chain. Besides the numerous political and system-related questions which need to be solved, the wagon has to and will further evolve in order to help, as an absolutely needed building block, make intermodal transport on rail more attractive and future-proof.

- UIRR catalysed 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.
- UIRR partnered with RNE to develop and introduce the TiS for Terminals product, which should aid the functioning of CT terminals.

Development of the Association

- 7 new members were inaugurated into the association over the course of the 12-month period.
- Interest Groups: all six UIRR Interest Groups held regular meetings, functioning becoming routine.
- UIRR statistics programme was updated by the UIRR Quarterly CT Performance Indicator that was launched in January 2016.
- The recently implemented UIRR Extranet effectively supports the work of UIRR interest groups.
- Four memoranda of understanding were signed with peers promoting Combined Transport within the member states.

Outlook and Plans

The subjects at the top of the European Commission's Transport agenda of the coming years include a number of crucial topics for Combined Transport:

- The *Road Initiative*,
- The amendment of Directive 92/106,
- Development of transport infrastructure,
- Research and development projects,
- Implementation of the Fourth Railway Package,
- The amendment of the Rail Freight Corridor Regulation,
- Fulfilment of the Single European Railway Area.

A major opportunity for Combined Transport that needs to be developed further is the COP21 global climate agreement reached in the final weeks of 2015.

UIRR is geared to participate actively in all of these activities over the coming years.

Establishment of a Register of Intermodal Loading Units, operating the Last Mile Portal, contributing to ERA's Register of Infrastructure, and a common European Wagon Register are all high on UIRR's agenda. These systems, alongside a door-to-door intermodal tracking and tracing system, an intermodal journey planner and quote solution, as well as the development of best practice guidelines concerning several aspects of the business would be needed to keep European Combined Transport on the growth path that begun in the early 1990s.

UIRR will also continue to take a prime role in all forms of standardisation as well as research and development activities targeting aspects of transport relevant to Combined Transport.

Strengthening the Association

Attracting European CT Operators and Terminal Managers - not yet a member - to join UIRR will be actively pursued over the coming years. Members and experts from every CT business model, every geographic region and every business size are needed to enrich the expertise embodied in UIRR, as well as to give it further energy.

UIRR plans to conclude further Memoranda of Understanding to continue enriching its Member State level network by close collaboration of all organisations committed to Combined Transport.

Partners, beside members, from among companies and sectors of the economy are also invited to align themselves with UIRR and its platforms. Similarly, the association will continue to collaborate with every stakeholder and peers group, participate in all initiatives aiming to reach goals that take closer to reaching UIRR's declared objectives.

UIRR Board of Directors

New Members

RCT - BILK TERMINAL

Rail Cargo Terminal BILK, opened in 2003, is the leading CT Terminal in Hungary serving mainly the Central Region of the country. The Terminal has neared its design capacity in 2008; therefore it was extended to handle up to 220.000 TEU annually. Besides the fundamental road-rail transhipment services, RCT-BILK offers a wide range of services from storage through maintenance to customs agency.

Advanced technologies aid the daily operations of the terminal including optical character recognition directly linked to the EDI system to ensure correct data input, security camera system scanning the fully fenced surface, and complete GPS-based territory management.

RCT-BILK belongs to the Rail Cargo Group, which is the logistics and freight transport arm of the Austrian State Railway Company.

http://railcargobilk.hu

RAILPORT ARAD

Railport Arad was established with a €10 million investment completed in 2009 near Curtici, Arad County in the western part of Romania. The terminal located on 10.3 hectare land, features two 650m long tracks, and is equipped with two cranes.

Since the terminal is operating near its nominal capacity, an extension project has been decided last year. The first phase of this will be completed in October 2015, while the second is scheduled for the Spring of 2016. Subsequently, the possibility to handle several additional trains will be established.

The destinations presently served from the terminal include Germany, Austria and Hungary. New services to domestic as well as foreign destinations are being devised.

www.railportarad.ro

TERMINAL SERVICE AUSTRIA

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

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

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

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

www.oebb.at/infrastruktur/de/_p_3_0_fuer_Kunden_Partner/3_8_5_Terminal_Service_Austria/index.jsp

AMBROGIO TRASPORTI

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

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

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

www.ambrogio.it

T3M

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

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

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

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

www.t3m.fr

IMS CARGO

IMS Cargo (Austria) began focusing on the organisation of container logistics shortly after its founding in the early 1990s. With the launch of its first own trains in 1996, this became the strategic activity of the company.

Today IMS Cargo focuses on creating connections between the main economic centres of Europe and Austria. Together with its partners, IMS Cargo offers 150 trains weekly with a total capacity of about 13000 TEU.

The company operates offices in 9 countries: Austria, Belgium, Germany, Hungary, Netherlands, Portugal, Slovakia, Spain and Switzerland.

www.imscargo.com

RCO CSKD

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

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

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

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

www.railcargo.com/en/About_us/RC_group/Operator

Last Mile Study

In order to curb transportation's CO_2 emissions in Europe a series of major changes need to be made. When it comes to long(er) distance overland freight transport, forceful modal shift is needed from trucks to more energy efficient and less polluting modes such as rail, inland waterways and short sea shipping. In either case the shift is easiest made through intermodality, when the cargo is packed into an intermodal loading unit easily transferable between various carrying modes. In order to deliver the modal shift targets of the Transport White Paper of the European Commission the number of CT services across Europe will have to be doubled. The Commission-initiated Last Mile Study aims to bring all information concerning entry and exit points for freight to the European rail network into a single source, the Internet portal: http://railfreightlocations.eu.

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

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

The general objectives of the European study was:

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

WP1 - Identification and analysis of user needs

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

WP 2 - Identification and description of primary data sources

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

WP3 - Identification and comparative analysis of existing web-based information portals

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

WP 4 - Setting up a web-based information portal

Based on the results of WP1, WP2 and WP3 it was finally decided to develop a new portal with the support of some data providers.

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

UIRR and its partners are pursuing the business model, defined as part of the Study final deliverables, that will ensure the continuous functioning of the portal, also enrich and provide the regular quality upkeep of its contents.

UIRR is determined to offer in the future this service to the organisers of rail freight, and Combined Transport in particular.

ANSB 100797 3

Administrator of the 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 for semi-trailers, swap bodies and non ISO containers used in European Combined Transport - identically structured as the world renowned BIC-Code. Distribution of the ILU-Code was started soon-to-be five years ago by UIRR - on 1 July 2011. www.ilu-code.eu

Progress of marking

The number of ILU-Code owner-key registrations increased by over 20% in 2015, as compared to a year earlier, exceeding 850 owner-keys at the end of the year. The ILU- and BIC-Code compliance of intermodal loading units taking part in unaccompanied road-rail Combined Transport in the EU have exceeded 95% by the end of 2015.

Competitiveness enhanced

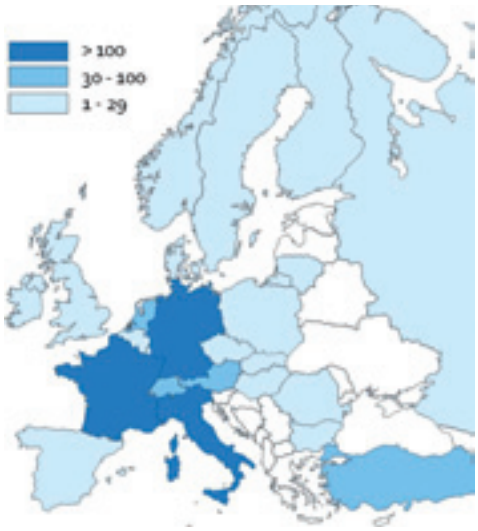
The freight transport sector and the related governmental services can only base the identification of unaccompanied intermodal consignments on the ILU- and the BIC-Code **if these are used by everyone to enable efficient booking, paperless processing and reliable tracking and tracing.**

- **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 (OCR) 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.

Promotion supporters

The European Commission also aided the effort to proliferate the use of the ILU-Code as it was deemed essential to devise the digitalisation seen indispensable to boost the competitiveness of Intermodal and Combined Transport. The EU funded DESTINY Project brought together more than a dozen stakeholders to promote the use of the ILU-Code.

Geographical distribution of the ILU-Code Owner-Keys



Challenges

Introducing the right control mechanisms into electronic intermodal booking tools as well as terminal operating systems to control the validity of the ILU- and BIC-Code owner-keys is essential to begin reaping the benefits of the new identification regime.

The outlook

Identification of intermodal loading units taking part in unaccompanied Combined Transport using the ILU- or BIC-Code within the European Union will gradually become compulsory:

- for unaccompanied consignments originating from or going to outside the EU through the Modernised Customs Code that is to take effect in May 2016, and
- for intra-EU traffic the necessary provision is likely to be contained in the amendment of Directive 92/106.

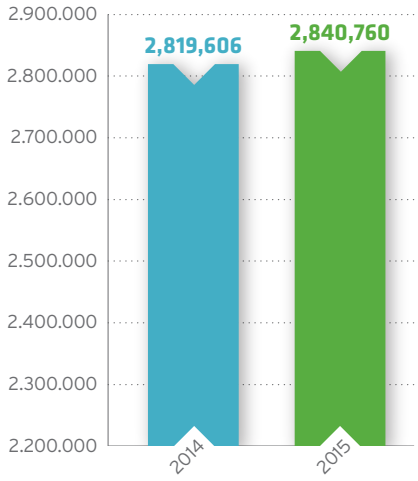
Performance
in figures - Statistics 2015

Summary

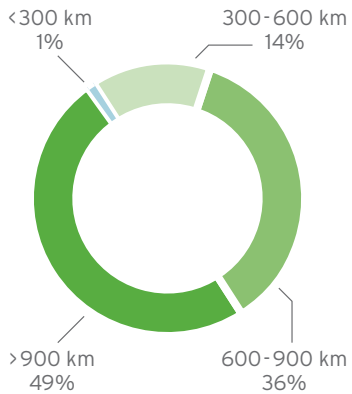
European Combined Transport closed a year of mixed results in 2015: the total number of consignments transported by UIRR member operators increased by 0.75%, on the other hand the output, when expressed in tonne-kilometres, grew by 5.23% as compared to a year earlier. Accompanied Combined Transport (RoLa) contracted by 5.55%. Shorter distance CT suffered disproportionately, while longer distance and intercontinental relations prospered resulting in a 5.23% growth of the average distance per consignment from 851km a year earlier to 882km in 2015.

	Border Crossing			Domestic			Total		
	2014	2015	2015/2014	2014	2015	2015/2014	2014	2015	2015/2014
Number of consignments	1,833,011	1,902,330	3.78%	986,596	938,430	-4.88%	2,819,606	2,840,760	0.75%
containers	1,385,149	1,444,232	4.27%	917,683	868,705	-5.34%	2,302,831	2,312,937	0.44%
(craneable) semi-trailers	304,270	322,486	5.99%	58,384	59,764	2.36%	362,654	382,250	5.40%
complete trucks (RoLa)	143,592	135,612	-5.56%	10,529	9,961	-5.39%	154,121	145,573	-5.55%
Average distance	1,005	1,036	3.03%	507	505	-0.38%	851	882	3.60%
Billion tkm	42.58	45.80	7.55%	9.59	9.10	-5.07%	52.17	54.90	5.23%
Number of TEU	3,666,021	3,804,660	3.78%	1,973,192	1,876,859	-4.88%	5,639,213	5,681,519	0.75%

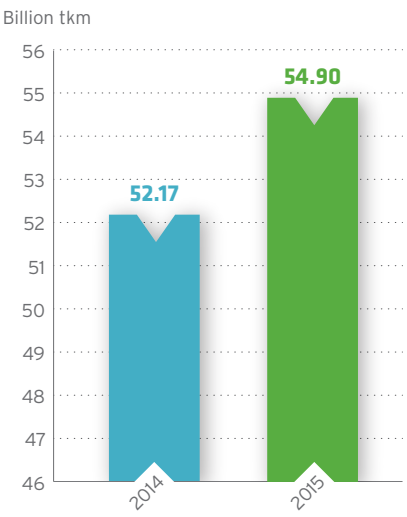
Consignments 2014-2015



Distance matrix



Tonne-kilometres 2014-2015



Evolution of Combined Transport Traffic

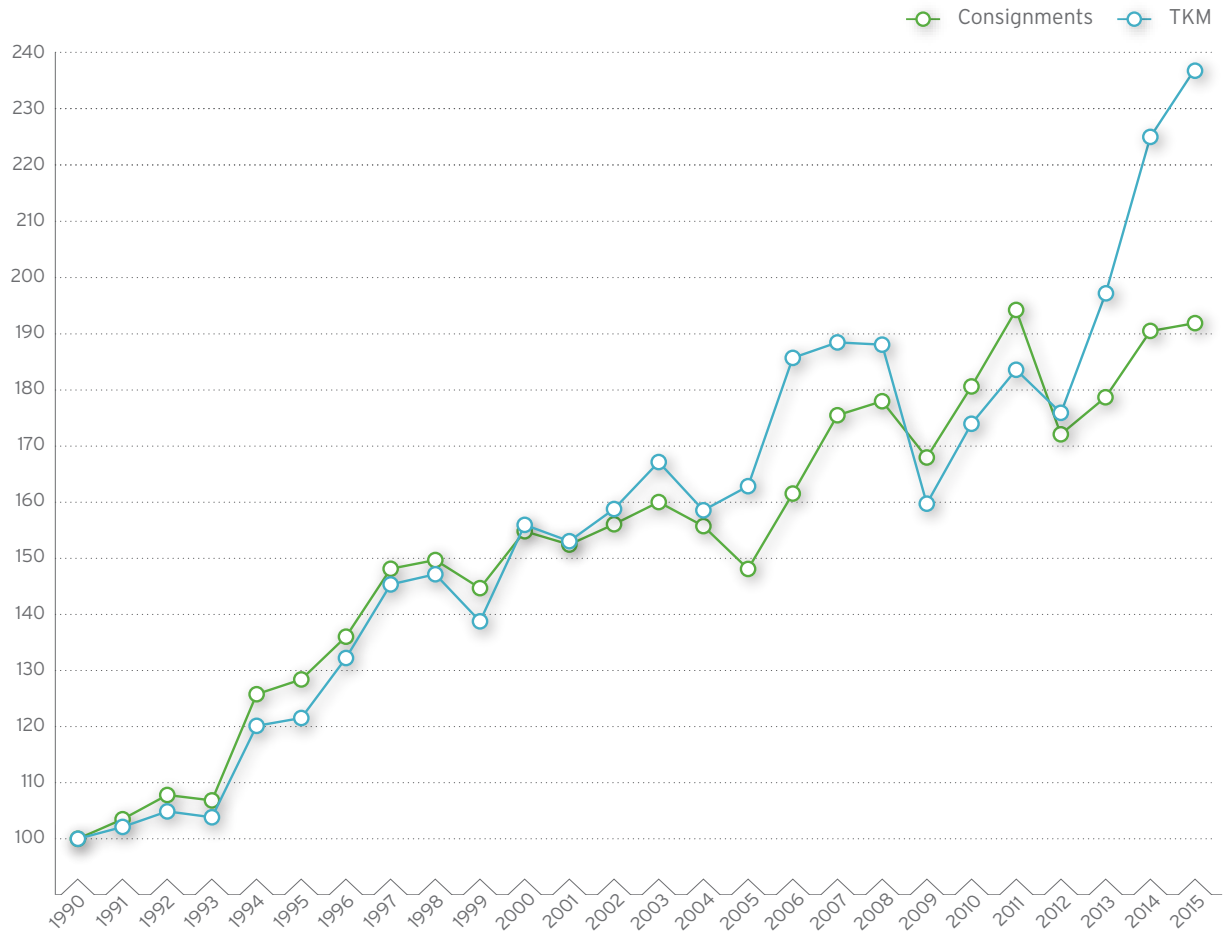
1990 - 2015

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) | ** 2013/2014/2015 figures include traffic of new members TEL and FELB
*** 2014/2015 figures include traffic from Ambrogio, CFL, IMS and T3M

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 able to provide data for the previous year as well. 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***	2015***	% 15/14
2,994,625	2,818,349	3,030,865	3,075,808	2,529,264	2,645,950	2,819,606	2,840,760	0.75%
2,318,990	2,182,569	2,281,746	2,330,918	2,067,488	2,134,004	2,302,831	2,312,397	0.44%
246,690	219,800	300,867	318,567	333,597	375,432	362,654	382,250	5.40%
428,945	415,980	448,252	426,323	128,179*	136,514	154,121	145,573	-5.55%
45.97	38.90	42.37	42.58	39.08	40.74	52.17	54.90	5.23%
3%	4%	5%	7%	3%	2%	2%	1%	↓
17%	16%	16%	12%	12%	21%	17%	14%	↓
35%	36%	42%	44%	47%	39%	36%	36%	=
45%	44%	37%	37%	38%	38%	45%	49%	↑

Analysis

Overall: The UIRR CT Growth Index shows - see graph on p.32 - that during the 25 years that UIRR has operated in Brussels, Combined Transport performance has doubled itself in terms of consignments, whereas the growth rate when measured in tonne-kilometres was nearly 2.4-fold. 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), 2009-2013 (the double dips of the global financial and European economic crisis) from 2014 (the inclusion of robustly growing intercontinental transport and decline of shorter haul domestic traffic).

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 13% by 2015.

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 2015: The UIRR member CT operators realised an interesting increase in consignments on border crossing relations (+3.8%) while registred a decline on domestic routes (-4.9%) mostly in Italy and Belgium. Only unaccompanied Combined Transport (UCT) with containers, swap bodies and (craneable) semi-trailers could increase its share in 2015 especially with an important increase in border crossing operations (+4.6% compared to 2014), while the transfer of complete trucks (RoLa) declined in both segments with a total negative result of 5.5%.

The best performing country relations in 2015 were as follows (relative improvement):

- Germany vv China +249% (+ 25,000 consignments)
- Italy vv Luxembourg +191% (+ 10,000 consignments)
- Germany vv Denmark +121% (+ 4,000 consignments)
- Germany vv Sweden +105% (+ 8,000 consignments)

The best performing country relations in 2015 were as follows (in number of consignments):

- Germany vv Italy +30,000 consignments (+6%)
- Belgium vv Italy +40,000 consignments (+23%)
- France vv Italy +20,000 consignments (+60%)
- Germany vv Netherlands +15,000 consignments (+13%)

Declines have been recorded on several country relations:

- Italy vv Netherlands -17% (-14,000 consignments)
- Belgium vv Germany -28% (-10,000 consignments)
- Austria vv Slovenia -13% (-7,000 consignments)

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	Combined Transport
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	Tonne-km	Techniques, % consignments			
from	to							ST	SB/CT	SB/CT	RoLa
Country							1,000 tkm		<8,30m	>8,30m	
AT	BE	636	772,133	1,215	15	9,524	11,572		13%	87%	
BE	AT	526	639,090	1,215	23	12,097	14,698		29%	71%	
AT	DE	21,458	21,890,865	1,020	23	497,408	508,006	3%	51%	46%	
DE	AT	35,924	33,955,815	945	26	916,175	866,492	20%	35%	45%	
AT	HU	65	22,750	350	23	1,488	521		50%	50%	
HU	AT	519	181,650	350	23	11,885	4,160		50%	50%	
AT	IT	9,547	3,216,804	337	22	209,502	75,893	22%	29%	20%	29%
IT	AT	5,811	2,379,552	409	24	141,409	59,941	36%	12%	16%	36%
AT	NL	1,533	1,747,923	1,141	24	37,098	42,299		56%	44%	
NL	AT	600	775,154	1,293	26	15,691	20,288		59%	41%	
AT	SI	28,253	8,871,007	314	31	876,822	282,307		47%		53%
SI	AT	19,450	6,209,747	319	36	693,884	229,628		21%		79%
BA	SI	5	2,492	498	2	12	6		100%		
SI	BA	5	655	131	23	115	15		100%		
BE	BG	534	1,332,330	2,495	26	13,884	34,641		97%	3%	
BG	BE	266	663,670	2,495	4	1,064	2,655		95%	5%	
BE	CH	15,331	10,683,050	697	23	358,681	249,628		60%	40%	
CH	BE	15,142	11,334,744	749	13	202,646	151,690		64%	36%	
BE	DE	12,280	7,802,267	635	22	271,232	182,140	3%	66%	31%	
DE	BE	14,970	9,961,001	665	19	288,670	188,207	1%	74%	25%	
BE	ES	15,388	22,717,286	1,476	28	425,681	628,043		54%	46%	
ES	BE	11,930	19,456,854	1,631	19	221,090	366,107		63%	37%	
BE	FR	28,275	21,382,114	756	17	470,838	379,344	2%	54%	44%	
FR	BE	25,593	18,897,936	738	19	485,465	375,523	2%	52%	46%	
BE	GR	19	20,748	1,092	28	525	574		100%		
GR	BE	10	17,300	1,730	8	76	132		100%		
BE	HU	28	41,580	1,485	30	840	1,247		83%	17%	
BE	IT	124,487	139,083,443	1,117	25	3,155,837	3,523,741	9%	41%	50%	
IT	BE	102,765	118,974,414	1,158	23	2,317,251	2,668,126	10%	37%	53%	
BE	KZ	56	227,752	4,067	28	1,575	6,405		100%		
KZ	BE	11	62,020	5,907	11	120	708		100%		
BE	LT	10	22,340	2,234	10	99	221		100%		
BE	LU	11,781	3,722,796	316	22	262,673	83,005		81%	19%	
LU	BE	10,174	3,214,984	316	12	120,407	38,049		68%	32%	
BE	NL	117	19,152	164	6	746	122		75%	25%	
NL	BE	635	72,960	115	29	18,717	2,150		77%	23%	
BE	PL	3,874	3,879,937	1,002	29	110,469	110,639	1%	64%	35%	
PL	BE	2,822	1,648,653	584	15	41,264	24,107		70%	30%	
BE	RO	11,529	18,849,915	1,635	24	276,696	452,398	25%	18%	57%	
RO	BE	9,826	16,065,510	1,635	19	186,694	305,245	29%	5%	66%	
BE	RU	237	491,684	2,079	32	7,477	15,545		93%	7%	
RU	BE	193	525,078	2,728	8	1,553	4,237		100%		
BE	UZ	1	1,084	1,084	26	26	28		100%		
BG	RO	66	46,200	700	4	264	185		100%		
RO	BG	122	108,580	890	29	3,538	3,149		100%		
BY	DE	1	520	520	21	21	11		43%	57%	
DE	BY	458	306,827	671	17	7,759	5,203		31%	69%	
BY	IT	4	2,080	520	16	63	33			100%	
BY	PL	3	1,560	520	4	12	6			100%	
PL	BY	21	9,255	441	8	166	73		67%	33%	
CH	AT	381	133,175	350	23	8,713	3,050		50%	50%	
CH	DE	12,570	8,048,169	640	18	231,107	147,976	36%	48%	16%	
DE	CH	30,417	18,778,924	617	26	798,092	491,324	19%	58%	23%	
CH	ES	97	178,310	1,848	25	2,397	4,428		100%		
CH	FR	11	13,284	1,265	12	129	163		100%		
CH	IT	886	311,550	352	16	13,865	4,878	2%	51%	47%	
IT	CH	2,159	767,827	356	21	44,860	15,954	5%	63%	32%	
CH	NL	14,031	12,778,793	911	19	262,102	238,711	14%	38%	48%	
NL	CH	3,967	3,826,350	965	23	91,283	88,058	16%	46%	38%	
CH	NO	2	3,596	1,798	17	34	62	100%			
CH	SE	12	15,430	1,342	22	250	343	70%	30%		
SE	CH	41	81,000	1,976	26	1,053	2,081		100%		
CN	DE	18,768	186,174,177	9,920	20	380,134	3,769,827		18%	82%	
DE	CN	16,540	164,074,604	9,920	23	374,595	3,713,520		29%	71%	
CZ	DE	11,104	7,945,924	716	21	238,053	170,356	62%	35%	3%	
DE	CZ	13,638	7,091,785	520	26	360,871	187,586	75%	21%	4%	
CZ	IT	1,662	1,391,094	837	25	41,691	34,895	100%			
IT	CZ	1,691	1,415,367	837	23	38,927	32,582	100%			
CZ	SI	5,970	5,100,828	854	14	82,762	70,713		100%		
SI	CZ	5,910	5,051,041	855	13	79,596	68,027		100%		
DE	DK	3,978	3,610,926	908	25	100,398	91,627	24%	21%	55%	
DK	DE	3,883	2,954,512	761	14	52,518	42,038	23%	17%	60%	
DE	EE	2	3,600	1,800	31	62	112		100%		
DE	ES	21,646	33,024,605	1,526	25	544,472	829,815		80%	20%	
ES	DE	22,215	36,304,204	1,634	23	516,508	843,953		76%	24%	
DE	FI	97	156,470	1,613	27	2,587	4,174		96%	4%	
DE	FR	10,636	12,298,267	1,156	25	271,087	313,268		53%	47%	
FR	DE	8,394	9,358,429	1,115	18	149,351	167,740		55%	45%	
DE	GR	653	1,576,215	2,416	28	17,949	43,300	28%	61%	11%	
GR	DE	9	15,570	1,730	8	68	117		100%		
DE	HR	11	32,938	2,994	33	362	1,083			100%	
DE	HU	17,780	22,471,161	1,264	24	425,293	531,679	26%	45%	29%	
HU	DE	9,194	9,209,432	1,002	21	190,861	191,241	49%	16%	35%	
DE	IT	369,752	302,882,758	819	28	10,214,200	8,268,910	30%	32%	24%	14%
IT	DE	265,576	214,782,960	809	23	6,008,048	4,584,510	29%	26%	26%	19%
DE	KZ	25	14,511	580	26	645	374		100%		
KZ	DE	54	256,840	4,756	20	1,053	4,749		100%		
DE	LT	12	16,844	1,465	5	60	88		100%		
DE	LU	2,719	802,105	295	33	89,141	26,297	51%	17%	32%	
LU	DE	2,269	669,355	295	32	72,182	21,294	51%	15%	34%	
DE	NL	70,272	31,820,251	453	20	1,439,482	664,454	8%	42%	50%	
NL	DE	60,061	24,658,974	411	18	1,088,447	454,855	1%	35%	64%	
DE	NO	659	1,031,748	1,566	27	17,471	27,348		68%	32%	
NO	DE	3	3,586	1,195	14	43	52		100%		
DE	PL	24,771	23,396,742	945	23	559,973	522,451	1%	49%	50%	
PL	DE	17,421	16,759,838	962	8	134,975	129,843		45%	55%	
DE	PT	363	943,501	2,599	27	9,927	25,802		60%	40%	
DE	RO	1,301	1,687,392	1,297	29	38,267	49,632		73%	27%	
RO	DE	706	736,604	1,043	10	7,096	7,404	6%	69%	25%	
DE	RS	102	218,669	2,154	20	2,052	4,711		100%		
RS	DE	211	379,868	1,800	21	4,478	8,061		100%		

Relations from Country	to	Consignments C	Consignments-km S*km	Average Distance	Average Weight t/C	Gross Weight t	Tonne-km 1,000 tkm	Techniques, % consignments ST	SB/CT <8,30m	SB/CT >8,30m	RoLa
DE	RU	3,192	5,443,850	1,705	23	74,043	118,781		60%	40%	
RU	DE	2,158	5,049,664	2,340	17	36,697	85,886		29%	71%	
DE	SE	9,546	10,243,766	1,073	26	251,265	269,503	36%	47%	17%	
SE	DE	7,361	7,642,794	1,038	19	142,524	147,123	40%	39%	21%	
DE	SI	2,160	2,356,895	1,091	31	67,774	73,969		80%	20%	
SI	DE	5,321	4,030,870	758	8	44,324	33,577		90%	10%	
DE	SK	189	481,796	2,549	23	4,259	10,853		96%	4%	
DE	TR	3,044	9,786,642	3,216	29	88,467	284,473		87%	13%	
TR	DE	1,852	5,738,058	3,098	9	16,968	52,572		86%	14%	
DE	UZ	2	9,505	4,753	25	51	241		100%		
UZ	DE	1	2,350	4,700	8	4	19		100%		
DK	IT	6,077	6,825,657	1,123	28	170,455	191,454	25%	36%	39%	
IT	DK	4,439	6,745,394	1,520	25	111,043	168,764	21%	23%	56%	
DK	SE	8	2,971	396	9	69	27	24%	38%	38%	
SE	DK	31	6,891	222	8	255	57	33%	33%	34%	
ES	IT	2,127	2,361,671	1,111	29	61,204	67,973		81%	19%	
IT	ES	1,307	1,501,789	1,149	22	28,378	32,620		73%	27%	
ES	PL	117	161,205	1,378	26	3,083	4,248		100%		
PL	ES	9	9,348	1,039	11	99	103		100%		
ES	SE	1	983	983	23	23	22		100%		
FR	ES	19	23,088	1,215	22	424	514		95%	5%	
FR	IT	22,322	19,926,042	893	25	568,507	508,885		13%	87%	
IT	FR	31,407	28,003,087	892	20	641,235	574,783	2%	63%	35%	
FR	LU	13,929	9,538,593	685	25	345,459	234,028	37%	21%	42%	
LU	FR	13,985	9,559,505	684	29	409,354	263,115	37%	21%	42%	
FR	PL	67	53,758	802	32	2,122	1,702		100%		
PL	FR	74	89,433	1,217	8	596	725		70%	30%	
FR	UK	414	385,481	931	29	11,935	11,368		93%	7%	
UK	FR	224	149,709	668	13	2,892	2,975		95%	5%	
GR	IT	1	1,730	1,730	7	7	13		100%		
IT	GR	19	33,060	1,740	28	535	932		100%		
GR	NL	5	7,785	1,730	8	35	60		100%		
GR	SI	49	4,292,570	1,359	4	196	17,213		100%		
HR	HU	742	419,972	566	5	3,710	2,100		6%	94%	
HU	HR	2,650	1,499,900	566	3	7,950	4,500		78%	22%	
HR	RS	40	25,320	633	27	1,080	684		35%	65%	
RS	HR	149	94,317	633	14	2,086	1,320		22%	78%	
HR	SI	428	124,120	290	14	5,992	1,738		45%	55%	
SI	HR	317	23,639	75	15	4,724	352		62%	38%	
HU	IT	40	51,840	1,296	32	1,275	1,652		100%		
IT	HU	27	15,210	563	15	402	226		100%		
HU	NL	539	868,320	1,612	20	10,933	17,628		62%	38%	
NL	HU	1,248	1,601,184	1,283	24	30,106	38,626		68%	32%	
HU	RO	452	522,436	1,156	17	7,547	8,723	2%	75%	23%	
HU	RS	14	6,950	515	10	141	72		100%		
HU	RU	1	345	345	27	27	9			100%	
HU	SI	12,420	8,479,134	683	14	177,035	120,862		100%		
SI	HU	18,871	13,016,650	690	15	282,140	194,612		100%		
HU	UA	6	770	128	22	132	17		13%	87%	
IT	LU	7,825	8,304,528	1,061	23	179,121	201,627	79%		21%	
LU	IT	7,568	8,033,217	1,061	32	244,311	259,778	78%		22%	
IT	NL	34,314	43,721,690	1,274	21	731,293	929,043	18%	51%	31%	
NL	IT	31,713	36,539,175	1,152	27	864,768	996,088	1%	66%	33%	
IT	NO	64	77,065	1,204	21	1,334	1,607		100%		
NO	IT	5	4,223	845	26	128	108		50%	50%	
IT	PL	411	255,184	621	28	11,503	7,142		77%	23%	
PL	IT	131	49,799	380	27	3,554	1,351		94%	6%	
IT	RO	128	43,264	339	31	3,905	1,325		100%		
RO	IT	132	106,202	808	26	3,391	2,738		86%	14%	
IT	RU	39	24,102	618	32	1,243	768		100%		
IT	SE	3,642	3,161,136	868	26	95,624	83,010	18%	57%	25%	
SE	IT	8,618	12,729,949	1,477	30	257,169	380,623	36%	35%	29%	
IT	TR	247	556,909	2,255	24	6,046	13,632		32%	68%	
TR	IT	202	453,015	2,243	5	977	2,191		27%	73%	
KZ	PL	17	75,820	4,460	7	127	566		100%		
LT	IT	24	14,614	609	30	714	435		100%		
LT	PL	58	35,438	611	27	1,549	947		40%	60%	
PL	LT	27	11,121	412	7	185	76		33%	67%	
NL	BY	1	2,225	2,225	8	8	17			100%	
NL	ES	222	247,308	1,114	30	6,579	7,329		67%	33%	
NL	KZ	11	34,254	3,114	29	317	988		100%		
NL	LT	3	4,965	1,655	27	81	135		100%		
NL	PL	856	1,253,184	1,464	16	13,536	19,817		30%	70%	
PL	NL	442	675,376	1,528	10	4,259	6,508		41%	59%	
NL	RO	587	1,318,402	2,246	31	18,133	40,726		89%	11%	
RO	NL	107	187,785	1,755	9	950	1,667		100%		
NL	RS	125	278,625	2,229	32	3,961	8,829		100%		
RS	NL	1	1,556	1,556	8	8	12		100%		
NL	RU	191	418,863	2,193	32	6,033	13,230		100%		
RU	NL	79	217,488	2,753	13	1,019	2,806		100%		
NL	UA	13	35,295	2,715	29	373	1,014		100%		
NO	RU	228	349,659	1,537	22	4,941	7,594		40%	60%	
PL	RU	982	4,836,350	4,925	24	23,647	116,464		94%	6%	
RU	PL	135	599,711	4,442	8	1,028	4,566		100%		
PL	SE	29	46,035	1,587	4	121	191		100%		
SE	PL	31	55,614	1,794	31	969	1,739		100%		
RO	UA	30	19,768	659	7	210	138			100%	
SI	IT	1,422	376,233	265	3	4,319	1,143		100%		
UA	RO	30	11,264	375	30	889	334			100%	
RS	SI	105	56,116	534	3	359	192		100%		
SI	RS	96	41,434	432	20	1,879	811		100%		
SI	MK	17	16,133	949	5	87	83		100%		
SI	SK	17,000	13,565,150	798	13	214,438	171,111		100%		
SK	SI	13,158	10,778,770	819	7	97,764	80,086		100%		
UA	DE	1	1,100	2,200	9	4	10		100%		
UZ	NL	1	8,886	8,886	8	8	71		100%		
Others		3,965	1,982,500	500	23	90,797	45,398		50%	50%	
TOTAL		**1,902,330**	**1,970,600,440**	**1,036**	**23**	**44,210,023**	**45,796,623**	**17%**	**43%**	**33%**	**7%**

Member companies

ADRIA KOMBI
Tivolska 50
SLO - 1000 Ljubljana
Tel.: +386 1 23 45 280
Fax: +386 1 23 45 290
infor@adriakombi.si
www.adriakombi.si

Activities: UCT - RoLa - RSO - RH
Agency: SI
Total traffic: 325,000 TEU
Revenue: € 42 million

ALPE ADRIA
Via S. Caterina da Siena, 1
I - 34122 Trieste
Tel.: +39 040 63 92 33
Fax: +39 040 36 48 42
amministrazione@alpeadria.com
www.alpeadria.com

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

AMBROGIO
Via Tognasca 5
I - 21013 Gallarate
Tel.: +39 0331 70 75 00
Fax: +39 0331 77 63 66
ambrogio@ambrogio.it
www.ambrogio.it

Activities: UCT - TTO - TTM - RH
Agencies: IT - BE - ES
Total traffic: 142 000 TEU
Revenue: € 58 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: 26,000 TEU
Revenue: € 7,4 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: 670,000 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: 110,000 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 handlings: 125,000 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

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

Activity: TTM
Agency: IT
Total handlings: 71,000 units
Revenue: € 11 million

CARGO TERMINAL ENNS
Ennshafenstaße 45
A - 4470 Enns
Tel.: +43 662 8588 6510
Fax.: +43 662 8588 6599
www.cargo-city-enns.at

Activity: TTM
Agency: AT
Total handlings: 293,000 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: 47,000 TEU
Revenue: € 83 million

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 - IT
Total traffic: 450,000 TEU
Revenue: € 150 million

IMS
Trillergasse 8
A - 1210 Wien
Tel.: +43 1 20168 0
Fax: +43 1 20168 8840
sales@imscargo.com
www.imscargo.com

Activity: UCT
Agencies: AT - BE - CH - ES - DE - HU - NL - SK - PT
Total traffic: 62 000 TEU
Revenue: n/a

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

Activity: TTM
Agency: UK
Total handlings: 12,000 units (since September 2015)
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: 1,425,000 TEU
Revenue: € 434 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 handlings: 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: 290,000 TEU
Revenue: € 97 million

NOVATRANS
10 rue Vandrezanne
CS 91397
F - 75634 Paris Cedex 13
Tel.: +33 1 85 34 49 00
Fax: +33 1 53 80 34 36
info@novatrans.fr
www.novatrans.fr

Activities: UCT - TTM - RSO
Agencies: FR - IT
Total traffic: 225,000 TEU
Revenue: € 70 million

ÖBB-INFRASTRUKTUR AG TERMINAL SERVICE AUSTRIA
Praterstern 3
A - 1020 Wien
Tel.: +43 1 93000 31169
terminal@oebb.at
infra.oebb.at

Activities: TTO - TTM
Agency: AT
Total handlings: 2,700,000 units and 50,000 trucks
Revenue: n/a

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 - AZ - UK
Total traffic: 116,000 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: 6,500 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

RAILPORT ARAD
FN
RO - Curtici
Tel.: +40 357 100 189
Fax: +40 357 100 190
www.railportarad.ro

Activity: TTM
Agency: HU
Total handlings: 50,000
Revenue: € 1.9 million

RAIL CARGO TERMINAL BILK
Europa utca 4.
H - 1239 Budapest
Tel.: +36 1 289 60 00
titkarsag.rct.bilk@railcargo.com
www.railcargobilk.hu

Activity: TTO
Agency: HU
Total handlings: 91,000 units
Revenue: € 7 million

TEL (TRANS EURASIA LOGISTICS)
Bellevuestraße 3
D - 10785 Berlin
Tel.: +49 30 297 54 800
www.trans-eurasia-logistics.com

Activity: UCT
Agencies: DE - CN - RU
Total traffic: 30,000 TEU
Revenue: n/a

T3M
11 rue Maryse Bastié
ZI de la Lauze
F - 34430 St Jean de Vedas

Activities: UCT - TTM - RH
Agency: FR
Total traffic: 208,000 TEU
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

Terminals

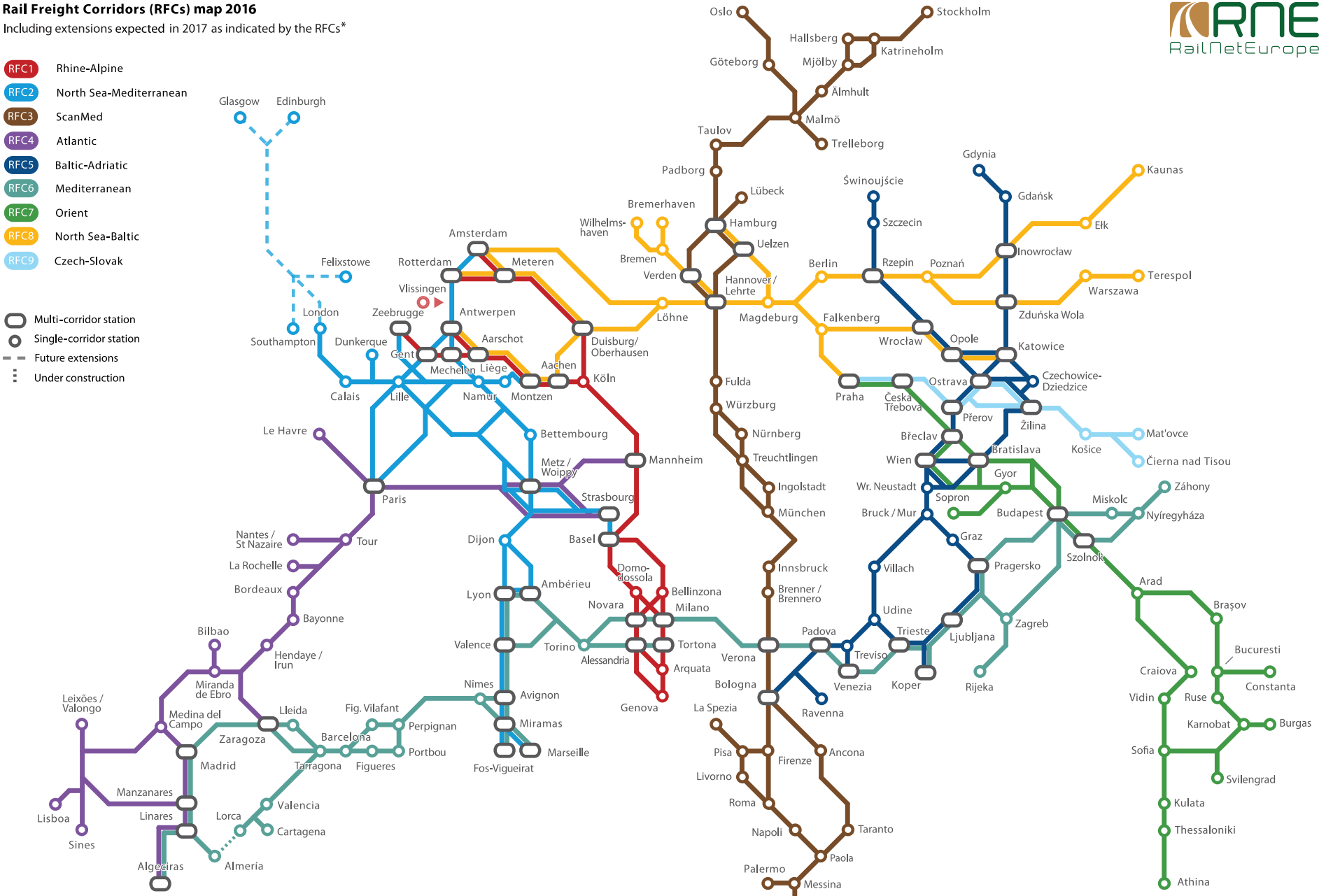
TRANSHIPMENT TERMINALS MANAGED BY UIRR MEMBER COMPANIES

List of terminals under own management		Type of connection			Total turnover (departing + arriving)	Technical data			Nearest railway station (entry point to the rail network)	Located on which European Rail Freight Corridor(s)
Name	City	UCT Rail	IWW*	RoLa	in units	Total surface (m^2)	Cranes (gantry + mobile)	Number of tracks		
Brennersee ROLA	Gries/Brenner			●	945,530	5,000	-	2	Brennersee	3
CTE	Enns	●	●		293,000	170,000	3	9	Enns	3, 5
CTS	Salzburg	●	●		210,000	100,000	2	6	Salzburg CCT	3
Salzburg Hbf ROLA	Salzburg			●	214,016	5,000	-	2	Salzburg Hbf	
St. Michael CCT	St. Michael	●			7,135	10,000		2	St. Michael	5
Villach Süd CCT/ROLA	Villach	●		●	50,504	70,000	3	6	Villach Süd	5
Wels Vbf CCT/ROLA	Wels	●		●	202,928	120,000	6	10	Wels Vbf	
Wien Nordwestbahnhof CCT	Vienna	●			47,101	19,000	3	2	Wien Nordwestbahnhof	5
Wolfurt CCT	Wolfurt	●			108,231	54,000	8	6	Wolfurt	
Wörgl CCT	Wörgl			●	1,148,521	40,000	-	3	Wörgl	3
ATO	Antwerp		●		115,290	93,598	6	2	Antwerp Angola	1, 2, 8
Cirkeldijk	Antwerp	●			101,741	52,000	6	4	Antwerp Berendrecht	1, 2, 8
Combinant	Antwerp	●			125,182	102,000	4	5	Combinant	1, 2, 8
Euroterminal	Genk	●			38,023	80,000	3	4	Genk Goederen	1, 2, 8
HTA	Antwerp	●	●		85,886	53,000	3	5	Antwerpen	1, 2
Main Hub	Antwerp				n/a	202,497	12	8	Antwerp North	1, 2, 8
Zomerweg	Antwerp	●			62,452	77,000	6	4	Antwerp Angola	1, 2, 8
Avignon	Avignon	●			72,000	85,300	6	9	Avignon	2, 6
Cognac	Cognac	●			12,000	6,478	2	3		
Dourges	Lille	●	●		9,500	600,000	9	14		
Gevrey	Dijon	●			7,800	15,000	2	4		2
Hourcade	Bordeaux	●			69,531	48,755	5	7		4
Le Boulou	Le Boulou	●			24,418	90,000	4	8	Le Boulou	6
Marseille	Marseille	●			45,000	41,363	6	6		
Clesud Terminal	Miramas	●			50,000	49,500	4	2	Miramas	2, 6
Mouguerre	Mouguerre	●			24,000	3,500	3	4	Bayonne	4
Noisy	Noisy-Le-Sec	●			35,000	70,000	4	10	Noisy	4
Saint Jory	Toulouse	●			46,000	52,595	4	4		
Socquence	Le Havre	●			10,000	4,000	1	2		
Valenton	Bonneuil-sur-marne	●			87,000	90,434	5	7	Villeneuve Saint Georges	2, 4
Venissieux	Saint-Priest	●			141,000	45,000	2	5	Venissieux	2, 6
TSG	Singen	●	●		77,419	63,000	3	4	Singen	1
Rail Cargo Terminal-BILK Co.Ltd.	Budapest	●			91,144	223,000	7	7	Soroksár-Terminal	6, 7
Candiolo	Candiolo	●			10,973	100,000	2	5	Candiolo	
EMT	Trieste	●	●		71,004	70,000	4	4	Trieste Campo Marzio	5, 6
Gallarate	Gallarate	●			36,152	100,000	2	3	Gallarate	
Giovinazzo Terminal	Giovinazzo (Ba)	●			12,200	30,000	2	4	Giovinazzo (BA)	3
Lugo Terminal	Lugo (Ra)	●			24,000	190,000	3	8	Lugo (RA)	5
Novara RoLa	Novara			●	100,349					
Piacenza	Piacenza	●	●		n/a	55,000	5	3	Piacenza	3
TBG	Busto/ Gallarate	●	●		357,183	243,000	12	18	Gallarate	1
HUB Terminal Poznan	Gądki	●			110,607	320,000		5	Gądki station	5, 8
Terminal Dąbrowa Górnicza	Dąbrowa Górnicza	●			15,286	225,000		4	Dąbrowa Górnicza Towarowa	8
Terminal Kontenerowy Pruszków	Pruszków	●			21,365	32,976		3	Pruszkow station	5, 8
Terminal Kontenerowy Wrocław	Wrocław	●			5,044	45,000	2	4	Wrocław Glowna	8
Bucuresti Sud	Bucharest	●			n/a	n/a	2	4		
Railport Arad	Curtici	●			50,000	10,000	3	2	Curtici	6
Aarau	Aarau	●	●		37,862	27,000	3	5	Aarau	2
Basel	Basel	●	●		41,330	17,000	3	2	Basel	2
Basel Weil	Basel	●			n/a		6	6	Basel	
Lugano Vedeggio	Lugano			●	9,961	2,000	1	2		
Z 4	Chiasso	●	●		6,498	7,000	1	1	Chiasso	1
Russell	Daventry	●			12,186*	12,000	2	2	Rugby	2

*(opened September 2015)

Rail Freight Corridors (RFCs) map 2016

Including extensions expected in 2017 as indicated by the RFCs*



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*Extensions indicated in the United Kingdom are planned in 2018.

UIRR

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FOR ROAD-RAIL
COMBINED TRANSPORT

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