UIRR Report

EUROPEAN ROAD-RAIL COMBINED TRANSPORT

2016-17

UIRR

INTERNATIONAL UNION
FOR ROAD-RAIL
COMBINED TRANSPORT

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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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Key Figures of the Year

250%
of GDP growth

the increase of cross-border CT tonne-kilometres by UIRR members in 2016

In contrast to the anticipated 2016 EU GDP growth of 1.8%, UIRR Combined Transport (CT) Operators realised a growth of 4.52% in cross-border Combined Transport tonne-kilometres, over the year, which is equal to 2.5 times the GDP growth. Combined Transport offers the most effective means to insert sustainable modes of transport into longer distance transport chains, which makes it attractive not only to economically but also to ecologically considerate shippers.

The multiple-year trend of contraction of domestic (shorter distance) Combined Transport appears to be coming to an end. The average distance of the domestic CT rail journey has been reduced by nearly 3% in 2016 to 491km, while the number of consignments forwarded on the rail network of a single Member State grew (by +0.76%) for the first time in several years.

491 km

the rail distance covered by the average domestic CT consignment in 2016

+20,2%

the growth in the ratio of semi-trailers among the loading units used

Semi-trailers were the engine of growth of both domestic (+32.4%) and border-crossing Combined Transport (+18%) in 2016. The overall share of semi-trailers, as a choice of intermodal loading unit within unaccompanied Combined Transport, exceeded 16.6%. Until the mid-1990s, when double stacking began in North American intermodal transport, the ratio of semi-trailers in US intermodal transport exceeded 50%.

2016: Growth with Positive Components

The past year was concluded with growth in terms of number of consignments forwarded by Combined Transport of 0.66% and 3.03% when counted in tonne-kilometres. This result is made up on the one hand of robust development of cross-border traffic (+4.4% in tonne-kilometre terms) and intercontinental CT (+6%), and on the other hand of contraction of RoLa (-7.4% in consignments) and shorter distance domestic traffic (-4.48%). The result – when compared to 2016 EU GDP growth estimated at 1.8% – is impressive.

The 50% increase of Member State spending on rail infrastructure maintenance and the resulting works-related disturbances adversely affected CT service quality in 2016. The downward pressure on freight rates – caused by the relatively cheap road fuel and stagnating road tolls – placed CT margins under pressure, whereas the corresponding costs of rail transport (traction energy and track access charges) did not decline commensurately, but were rather increased.

The State of Affairs

FROM THE PRESIDENT

European Road-Rail Combined Transport (CT) closed a positive year: 0.66% growth in terms of number of consignments and 3.03% when expressed in tonne-kilometres. The development of UIRR, the sector's industry association, has progressed well with the joining of 3 new terminal members, the conclusion of 9 partnership agreements as well as 3 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, followed a development path in 2016 alike the one observed during the preceding years:

- a moderate advance in the total number of consignments was achieved, coupled with a more significant growth when measured in tonne-kilometres;
- longer distance (cross-border and intercontinental) relations fared comparatively better;
- as a new phenomenon, short-distance (domestic) traffic began to show signs of stabilisation – following years of decline – with a growth (+0.76%) in the number of domestic consignments;
- accompanied CT continued to suffer, seeing its share drop below 5% of total traffic.

Combined Transport will to live up to its full potential and deliver the modal shift expected by European transport policy makers, as well as by the public. The precondition is the correction of regulatory conditions, which presently do not enable fair competition – either between the different modes of transport or on rail.

Attention should focus on the earning ability within the CT sector, as presently competing long-distance truckers are heavily favoured by stagnating road tolls and low fuel prices. Freight rates, being driven by the dominant road hauliers, must enable a cash-positive functioning of Combined Transport. Temporary compensatory measures should be introduced by Member States to ensure that private capital continues to be motivated to invest in Combined Transport.

Developments to the Regulatory Framework

The Fourth Railway Package and the amendment of the Regulation on Rail Statistics was brought to successful conclusion in 2016, which will positively impact the operating environment of Combined Transport.

A Ministerial Declaration and a Sector Statement were adopted on how to enhance the performance of Rail Freight Corridors – without a cumbersome multi-year legislative amendment.

On another note, the Commission initiatives concerning road transport suffered a delay. Subsequently, the proliferation of the *user pays* and the *polluter pays* principles (revision of the Eurovignette and other road directives) remains major task on the table of the European legislator. The long overdue reform of energy taxation has also been put off.

Preparations for the revision of Directive 92/106 on Combined Transport, which is vital to facilitate the harmonisation of the divergent national regulatory frameworks in place across the EU, have progressed to the next milestone: the REFIT (Regulatory Fitness) procedure was concluded with a positive outcome. The amendment proposal of the Commission should be unveiled by the end of 2017.

Work commenced on a Commission Implementing Act on Access to Service Facilities – essential to rail freight. This should fill the deficiency with regards to a harmonised European regulatory framework for transhipment terminals – vital to the efficient functioning of Road-Rail Combined Transport. The Implementing Act is expected to be adopted by the end of 2017.

"European Road-Rail Combined Transport closed a positive year: 0.66% growth in terms of number of consignments and 3.03% when expressed in tonne-kilometres"

Achievements of 2016

UIRR has actively participated in the debate concerning the development of the regulatory framework of European land transport:

- Input was provided to the development of the amendment proposal of the Directive 92/106 and the Implementing Act on Access to Service Facilities.
- Significant contributions were offered to the Commission's road initiatives that are expected – among others – to address the social, infrastructure charging, safety and enforcement issues of road transport.
- Considerable resources were spent on standardisation through participation to the work for the Europan Union Agency for Railways (revision of applicable TSIs), UIC and its leaflet updating efforts, as well as CEN preparing for the changes related to the recently amended Weights and Dimensions Directive.

Digitalisation is an important initiative of the European Commission, which can effectively mitigate the inherent complexity when several modes collaborate on the forwarding of a single consignment – as in Combined Transport. Paperless documentation, easier transport planning, quicker check-in/check-out at terminals, reliable ETA projection and tracking & tracing are all expected outputs of this initiative, which progressed with UIRR's meaningful presence throughout the year.

Proliferation of the ILU-Code, administered by UIRR, has continued to evolve. The requirement for a BIC or an ILU-Code on every intermodal consignment leaving or entering the European Union via unaccompanied CT – as contained in the modernised EU Customs Code – is an important development on this front.

Development of the Association

Over the course of 2016 UIRR inaugurated 3 new terminal members (KTL, Sopron Terminal and Swissterminal), while 9 new partnership agreements (Den Hartogh, Ermewa, Krone, LIS, Lohr Industries, Modalis, Nacco, Schmitz-Cargobull, Unit45) were concluded alongside 3 memoranda of understanding (MoU) with national associations (Assoferr, Groupement Fer, MLSZKSZ).

Ralf-Charley Schultze, President

Partners are essential to effectively address the technical challenges inherent to Combined Transport, whereas MoU peers are very helpful to bring legislative initiatives to success on a Member State level.

Outlook and Expectations

The UIRR Combined Transport Sentiment Index stood at *slightly positive* – up from *neutral* a year ago. This reflects the optimism that the excessive maintenance works will result in a better performing rail infrastructure, while the long planned and highly anticipated regulatory interventions will also bear fruit.

UIRR, as the industry association of European Combined Transport, will continue to professionally contribute to the policy measures and the changes in the regulatory framework deemed necessary to deliver the modal shift objectives of the Transport White Paper. These continue to be 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 making Europe a better place to live.

European CT

CT Operations Members' News

In 2016 European Combined Transport (CT) traffic grew by 0.66% in terms of consignments and by 3.03% when measured in tonne-kilometres as compared to a year earlier. The pace of development has been lagging if comparing the number of consignments to the expected EU GDP growth of 1.8%, while it was outstanding on a tonne-kilometre basis. Cross-border unaccompanied CT was the engine of growth at 1.2% and 4.52% as expressed in number of consignments and tonne-kilometres respectively. On the other end of the spectrum, shorter distance domestic relations and accompanied CT (RoLa) declined at the rate of 4.48% (tonne-kilometres) and 7.44% (consignments).

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 mobile reach-stackers in what is known as the vertical method, or horizontally using a variety of different, less well proliferated techniques such as Modalohr, Cargo Beamer, Rail Runner, Innovatrain, BoxTango, etc.

The place for transhipment is called a transhipment terminal, which is a facility equipped with the necessary technologies to connect various transport modes; most of the time road-rail, but not infrequently also offering links to inland waterways and sometimes seafaring vessels. 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 the so-called sustainable modes of transport - electric rail, inland waterways and shortsea 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 efficient 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 lends itself well - through tunnelling - to the task at hand.

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

- Rolling Motorways provided using the RoLa wagon design of WBN operated on several Trans-Alpine routes,
- The lorry rail connection between Torino (Orbassano) – Lyon (Aiton), 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.

Developments in 2016

- **Unaccompanied cross-border CT:**
  an outstanding growth of 1.2% year-on-year growth in terms of consignments and 4.4% when measured in tonne-kilometres was achieved. These are positive figures, nevertheless they are lower than the 3.78% and 7.55% recorded a year earlier. Extensive maintenance works were the most important disturbance to the smooth flow of freight trains undermining service quality. The positive aspect of maintenance works is that Member States are spending 50% more on these, which promises a significant improvement to the rail infrastructure in the years to come.
  Whereas 84.6% of CT tonne-kilometres were realised on cross-border relations in 2016, it must be kept in mind that many of the 945,000 domestic consignments may become a cross-border shipment after a rail-rail or road-rail transhipment.
- **Intercontinental CT:**
  the 6% growth of extra-EU - transcontinental – Combined Transport represents slower progress when compared to the 27% pace recorded a year earlier.
  Market players are gradually discovering the advantages of intercontinental CT, which is much faster than deep-sea navigation, yet significantly cheaper when compared to air cargo.
- **Unaccompanied domestic (shorter distance) CT:**
  whereas the number of consignments forwarded in this type of traffic grew somewhat (+0.76%), the nearly 4.48% reduction in tonne-kilometre terms indicates that stability is yet to be achieved. Road hauliers, aided by low diesel prices and reduced road tolls, pose the greatest competition on these relations. Longer distance domestic relations, on the other hand offer greater reliability thanks to no need to cross a border.
- **Accompanied CT - Rolling Motorways:**
  the 7.44% decline year-on-year, as well as the 4.6% overall share are a continuation of last year's negative trend. RoLa trains were especially negatively affected in 2016 by track maintenance works and the low diesel prices.
  The UIRR figures may not be representative in terms of accompanied CT, as they do not reflect the performance of some important RoLa operators that are not yet UIRR members, such as Europorte, Viia and Rail Cargo Operator (Austria).

Member's Comment

HANS-JÖRG BERTSCHI
Chairman of Hupac

Fifty years ago, four Swiss transport operators have founded Hupac together with the Swiss Railways. The newborn intermodal operator - one of the first in Europe - went into operation with five wagons that crossed the Alps from Melide to Basel. Today Hupac counts 5.000 wagons of its own, operates an intermodal network that covers Europe reaching as far as Russia and China, and still shows the same innovative energy that has its roots in the needs of the market.

2016 was a record year for Hupac: the traffic volume of 737,000 consignments exceeded the levels seen before the economic crisis. Hupac is actively responding to market demand: the "Shuttle Net" business unit is recording strong growth in the segment of 4-meter-trailers via the Swiss Alps; the business unit "Company Shuttle", which handles complete trains for single companies, is developing very positively, while the business unit "Maritime Logistics" is approaching the maritime hinterland traffic with its specific requirements. New markets in the East are addressed by the "Intermodal Express Russia" and "Landbridge China" units.

Hupac is consistently preparing for the future. The wagon fleet is expanded to meet the increasing demand. New terminal projects in Basel, Warsaw-Brwinów, Piacenza, Milano and Brescia are progressing. A digital strategy is formulated and gets implemented through several projects to further enhance business processes.

I am convinced that intermodal transport is the future carrier of freight over longer distances. Intermodal is far superior to direct road transport as well as conventional rail traffic with regards to both efficiency and sustainability. We believe in a bright future of intermodal transport and have the will to make it happen – also over the next 50 years!

"Intermodal transport is the future carrier of freight over longer distances. Intermodal is far superior to direct road transport as well as conventional rail traffic with regards to both efficiency and sustainability."

Obstacles to CT's Development

Infrastructure: rail infrastructure-related shortcomings hindered the development of Combined Transport. Increased maintenance works in some important Member States exacerbate the situation in the short-run.

- **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 of maintenance works.
- **Lack of train paths and traffic priority:** passenger transport enjoys unparalleled priority on rail which, coupled with a lack of infrastructure capacity means that the number of trains desired to be run by CT Operators can not always be accommodated on the infrastructure. This is reflected in the number and quality of the offered train paths.

Regulatory shortcomings: diverse national rules (operational as well as safety related), heterogeneous interpretation and implementation of existing European rules 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 are in place undisturbed.
- **Missing or inadequate EU-level rules:** outdated European energy taxation rules and the relatively low oil price do not allow the superiority of renewable electricity (used by trains) to be reflected by the ultimate market signal: price. Regulations concerning infrastructure changing are similarly problematic resulting in inexplicable differences from Member State to Member State.
- **Regulatory framework of CT 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. The standards for the CT reference wagon, used in codification of railway lines (profile gauge), and the semi-trailer envelope need to be redefined. New standards are needed for pallet-wide 45-foot swap bodies and containers.

Regulatory Changes Needed

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

- **Rail:** Considering the exclusive state ownership of rail infrastructure, politicians' actions are needed to focus on investments demanded by border-crossing rail freight, to better harmonise works, as well as to adjust traffic priority rules in favour of the train that is running on time.
- **Transport in general:** The regulatory imbalances that prevail to a differing extent from Member State to Member State between road transport and the sustainable modes must be eliminated. This requires extensive legislative and governance reforms. To cover the foreseeable long duration of the required changes, market-conform temporary compensatory measures should be introduced.
- **Combined Transport:** Productivity enhancement within the Combined Transport sector should be aided through standardisation-related measures, as well as by the European-level harmonisation of applicable rules and enforcement practices.

News from Operator Members

ADRIA KOMBI
The Slovenian CT Operator, which works closely with the Port of Koper, realised a setback of 4% in 2016.

ALPE ADRIA
The Trieste-based CT Operator, whose activities are linked to the Port of Trieste, achieved an overall positive performance in consignments (+8%) and robust growth in tonne-kilometres (+18%), attributable to longer distance cross-border connections, while Alpe Adria's domestic network declined.

AMBROGIO TRASPORTI
The Italian CT Operator, which also manages terminals in Italy and France, suffered a decline in output performance attributable to the combination of a pressure on margins related to the low oil price that depressed freight rates and disturbances due to rail infrastructure maintenance works that temporarily undermined service quality.

BOHEMIAKOMBI
The Czech CT Operator delivered a stable performance over 2016.

CEMAT
The dominant CT Operator of Italy realised a growth on its cross-border network, while suffering a contraction on domestic relations, which resulted in an overall growth in tonne-kilometres (+4%), while a decline in consignments (-3%).

CFL INTERMODAL
The CT Operator of Luxembourg delivered convincing growth in 2016, which translates into 16% in terms of consignments and 3% in tonne-kilometres.

COMBIBERIA
The Spanish CT Operator suffered an output contraction of 5% in 2016, mainly attributable to a combination of depressed freight rates and rail infrastructure maintenance-related problems.

CROKOMBI
The Croatian CT Operator, whose activities are related to the Port of Rijeka, delivered convincing growth of 32% in terms of consignments and an even stronger performance in tonne-kilometre terms.

FAR EAST LAND BRIDGE
The intercontinental CT specialist headquartered in Vienna, delivered convincing growth of 15% on its services to and from China and other Far East destinations over the course of 2016.

HUPAC
The Swiss CT Operator and terminal managing company, which offers one of the most comprehensive CT networks in Europe, delivered a robust overall growth performance of 9% in tonne-kilometres and 3% in number of consignments, which also included increases on relatively shorter distance domestic relations. In the middle of 2016, ahead of its upcoming 50th Anniversary in 2017, Hupac unveiled an ambitious CHF 280 million growth strategy.

INTERFERRYBOATS
The Belgian CT Operator, which also manages several terminals, delivered dynamic growth in terms of both consignments (+9%) and tonne-kilometres (+5%). The revived Belgian CT compensation scheme contributed to a convincing performance on relatively shorter distance domestic traffic, which positively impacted IFB's cross-border network.

IMS
The Austrian CT Operator suspended its domestic traffic, which it could not counterbalance on border-crossing relations and consequently suffered a significant decline of its overall output performance.

KOMBIVERKEHR
The largest European CT Operator headquartered in Frankfurt, Germany, delivered a convincing performance in 2016 aided by both its domestic and border-crossing services: overall growth of 6% in tonne-kilometres and 2% in the total number of consignments.

NAVILAND CARGO
The French CT Operator and terminal managing company, specialising in hinterland connections to and from French ports, suffered a contraction on both its domestic and cross-border network mirroring the reduction of container traffic at French ports.

NOVATRANS
The French CT Operator and terminal managing company suffered a decline on its domestic network, which it could not compensate with its better performing cross-border services, and thus realised a minimal contraction in tonne-kilometre terms, while transporting 5% fewer consignments.

POLZUG
The Polish CT Operator and terminal manager realised growth in terms of consignments, but a contraction when measuring performance in tonne-kilometres over the course of 2016. The company has been reorganised to bring it closer to its parent, HHLA.

RAIL CARGO OPERATOR - CSKD
The Czech daughter of Rail Cargo Operator suffered a contraction of 20% in both tonne-kilometre and consignment terms on its network throughout 2016.

RALPIN
The Swiss Rolling Highway specialist realised a 7% traffic decline in 2016. The phase 1 of expansion at Freiburg terminal, a key launching point for RAlpin, has been completed in May 2016, which should improve conditions there. The rail infrastructure maintenance-related service quality problems negatively impacted the overall performance, while cheap diesel undermined competitiveness.

ROCOMBI
The Romanian CT Operator and terminal managing company, specialised in domestic relations, increased its performance in consignments terms over the course of 2016.

T3M
The French CT Operator and terminal managing company, which specialises in domestic traffic, has been focusing on developing its cross-border network. T3M delivered a stable performance in 2016.

TRANS EURASIA LOGISTICS
The intercontinental CT specialist, which provides connections on Europe-Asia relations, started to organise domestic feeder services and delivered a year-on-year growth over 2016.

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. 17 UIRR member companies managed terminals, which is 3 more than a year earlier. 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 mean 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 "discrimination-free open access" to all users.

CT Terminals serve as a gateway for freight to the various modes of transport, which make them an important enabler of economic activities of a region. 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 vis-à-vis the core infrastructures of the modes intended to be connected even if there is no significant economic activity in the immediate vicinity.

Regulatory Framework of Terminals

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

- Freight terminals are mentioned as one type of service facility in the Single European Railway Area Directive (2012/34). The Directive contains some basic principles to the functioning of terminals, however more will only be known of its implication until the Commission Implementing Act on Access to Essential Service Facilities is adopted, which is not expected before the end of 2017. The European Commission Implementing Act on Access to Service Facilities – under Directive 2012/34 – has been emerging over the course of 2016. This act will help Member States to interpret the basic provisions contained in the Directive, and could ultimately become the engine of regulatory harmonisation.
- The Rail Freight Corridor Regulation (913/2010) mentions transhipment terminals requiring so-called Corridor Terminals to align their slots with pre-arranged train paths. Also, Corridors are required to publish information on Terminals along their lines.
- Finally, the revised TEN-T Guidelines (Core Network Corridors) and the Connecting European Facility (Transport) regulations - adopted in late 2013 - contain provisions declaring terminal development as an eligible cause for EU financial support.

The CT Terminal Product

The essential service of a CT Terminal is the facilitation of transhipment of the intermodal loading unit from one transport 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 proper labelling.

The load planning of trains is performed 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.

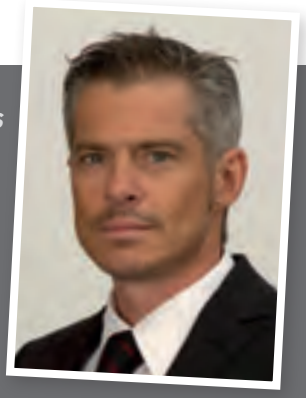
Terminals frequently offer a range of complementary services, such as customs agency, storage, loading unit and wagon inspection, weighing, cleaning and repair, stuffing and unstuffing, storage of goods and last mile road haulage.

CT Terminals are 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 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 receive bookings and arrival notices from incoming transport operators of any mode, as well as dispatch messages to both CT Operators and last mile transport providers.

Member's Comment



DR ANDREAS FUCHS
Managing Director,
Terminal Service Austria

Terminal Service Austria (TSA) is the terminal specialist arm of ÖBB, Austria's rail infrastructure manager. In 2016, TSA handled nearly 2.8 million consignments, full trucks travelling via RoLa services and intermodal loading units carried in unaccompanied Combined Transport.

The latest major development of TSA, Terminal Wien Süd, began functioning in January 2017. The new terminal is located on the premises of the Güterzentrum Wien Süd, newly built by ÖBB-Infrastruktur AG. This is a multi-functional terminal for Combined Transport, general cargo and wagonload traffic south of Vienna with a primary focus on Combined Transport.

Soon, a series of logistics services as well as a transfer hall for partial load traffic will also be launched. Terminal Wien Süd provides efficient access for logistic companies to the intermodal network of Austria. The new terminal is efficiently linked to the high-quality rail and road network and is therefore convenient for city-logistics, while its location in the outskirts of Vienna also results in a meaningful reduction of noisy and polluting trucking inside urban areas. Therefore, this relocation brings meaningful indirect benefits to the urban population.

The Güterzentrum Wien Süd is situated conveniently at an important intersection between the North Sea and the Black Sea, as well as for the rail connection to the big ports on the Adriatic Sea, thereby it links Vienna onto these important freight transport routes. With this development TSA not only meets the growing market demand, but also established the primary conditions for the shifting of additional transport volumes from road to environmentally friendly rail.

"With the development of Terminal Wien Süd TSA not only meets the growing market demand, but also established the primary conditions for the shifting of additional transport volumes from road to environmentally friendly rail."

Improvement of Terminal Operations

CT Terminals are similar in many aspects to airports: they must frequently deal directly with end-customers and the subcontractors of their direct (paying) customers. Moreover, quite often the improvement of a terminal's overall performance and efficiency requires measures that affect these relations.

- **Digitalisation** covers every type of paperless solution and IT system that terminals implement 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 proactively search for CT operators and shippers with a desire to ensure that the required connections are offered from their facility.

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

Enhancement of Terminal Infrastructure

Upgrading terminals to meet the TEN-T (terminal) requirements - including extended tracks, electrification and automatization - will require substantial efforts. Terminal owners are rarely aware of what the European legislator expects of them. A coordinated effort will be needed if the envisioned efficiency boosting upgrades are ever to materialise.

External Support to Terminals

CT terminals are strategically important infrastructure, as they are the gateways to the Combined Transport alternative, which is the only economic means to insert sustainable modes into long(er) distance transport chains for comparatively smaller quantities – not full trainloads – of cargo. Terminals are complex operations, and their establishment requires significant preparation and investment. Nevertheless, CT terminals are managed by relatively small companies with a 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 or, alternatively, may be purchased from external consultants. Statistics can efficiently be collected and benchmarking feedback 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, 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

AMBROGIO TRASPORTI
The family-owned Italian CT Operator manages two terminals in Italy and one each in France and Belgium, while owning stakes in a number of others. The handling performance in these terminals developed in line with the operations performance of Ambrogio Trasporti.

RAIL CARGO TERMINAL - BILK
The CT terminal of Budapest, built as the first such facility in the Hungarian capital, belongs to Rail Cargo Austria. The CT terminals that belong to the company outside Austria were recently organised into the entity: Rail Cargo Terminal. The number of units handled at BILK increased by 11% in 2016.

COMBINANT
The Combinant Terminal, established in the beginning by a consortium of Hupac, BASF and Hoyer in the Antwerp Port area, delivered a near 5% growth in 2016. Combinant introduced a number of innovations over the course of the year, including a speed-check-in-lane for quicker access for pre-announced road arrivals.

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 2016 traffic growth of the two facilities exceeded 9%.

EMT
The terminal based in the Port of Trieste recorded a growth of 4% year-on-year in 2016.

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 remained unchanged over the course of 2016 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. IFB restarted operations at its Antwerp Main Hub terminal, while closing down the aging Zomerweg facility. IFB terminals experienced reduced traffic during 2016.

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. Russell's terminals performed strongly in 2015.

KOMBITERMINAL LUDWIGSHAFEN - KTL
The German terminal operator, which joined UIRR over 2016, specialises in the nearby chemical traffic; hence, it may be considered a dangerous goods expert. KTL closed a disappointing year in 2016 that was attributable to an unfortunate accident at a nearby chemical plant, which made the terminal inoperable for over three weeks.

LUGO TERMINAL
The Italian terminal manager, besides a number of other businesses, manages two CT transhipment facilities: one in Lugo and another near Bari in the South of Italy. Lugo realised a contraction in its terminal business in 2016.

NAVILAND CARGO
The CT Operator, which specialises in port hinterland transport in France, manages seven terminals across the country, some together with its domestic peer Novatrans. In line with the CT train operations of the company, the seven terminals achieved a stable performance in 2016.

NOVATRANS
The CT Operator owned by GCA and headquartered in Paris operates six terminals across the country, some of which are shared with Naviland Cargo. Novatrans terminals performed with a moderate year-on-year change in 2016.

ÖBB INFRA - TERMINAL SERVICE AUSTRIA
The specialised manager of CT Terminals owned by ÖBB Infrastructure, Terminal Service Austria (TSA), handles the management of eight terminals in the country. TSA completed the move of its old Vienna terminal by December 2016 to the new facility located at the recently completed Freight Center Vienna South (Inzersdorf) site. TSA terminals processed altogether over 2.8 million units in 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 2016 declined, mirroring the slightly weaker performance of Polzug's CT operations.

RAILPORT ARAD
The Romanian terminal, close to the Hungarian border, has completed phase 1 of its ambitious expansion project that has doubled the capacity by early 2017. Growth of traffic at Railport Arad in 2016 exceeded 5%.

ROCOMBI
The Romanian CT Operator and terminal managing company took over management responsibilities for the Bucuresti Sud Terminal. The performance of the terminal was satisfactory on the back of the operations growth realised on domestic relations during 2016.

SOPRON TERMINAL - GYSEV CARGO
Terminal Sopron, owned by GYSEV Cargo, is the latest terminal member of UIRR. GYSEV Cargo has been a provider of traction services to several European CT Operators, and is the owner of Sopron Terminal in Western Hungary. The performance of the terminal over 2016 reflected GYSEV Cargo's business, which remained stable.

SWISSTERMINAL
The Swiss terminal managing company, which joined UIRR in 2016, operates four CT terminals. The performance of the terminals was stable over the course of the year.

T3M
The French CT Operator T3M also manages several terminals in the country. T3M terminals performed in line with the company's CT operations business and delivered a stable output in 2016.

Business
Environment & Outlook

Regulatory Framework Business Outlook

The business environment of Road-Rail Combined Transport is strained by several external phenomena: the persistently low price of diesel fuel, as well as the desperation of some long-distance road hauliers to resort to social dumping and the exploitation of other regulations governing the sector for the sake of keeping freight rates low. This is exacerbated by the unwillingness of several Member States to fairly and evenly apply the *user pays* and *polluter pays* principles to the various modes of transport, as well as their failure to devise an effective plan to decarbonise longer distance freight transport.

A Dysfunctional Market

Whereas freight transport in principle is liberalised and should be considered a competitive sector of the economy, the prevailing regulatory framework does not support fair and free competition. The diverse path followed by the various transport modes over the decades resulted in the present imperfect status quo.

- **Road:** an emphasised preference for the development of road infrastructue emerged after World War II. Roads were built by governments and simultaneously vehicle manufacturing was treated as a strategic industry. Charging for the use of the infrastructure went against the concept of "freeways", and taxpayers generally agreed to underwrite all the expenses both for the infrastructure and the externality consequences of road traffic. While trucks were run as a business from a relatively early point, they were never required to cover their total cost.
- **Rail:** in the past, the rail sector was nationalised, and both the infrastructure and the operating services were organised into national-level state-owned integrated companies. These companies were states in a state, responsible for everything from regulation to oversight and enforcement as well as the services they provided. During the 1990s the railway sector was slowly slated for liberalisation and separation. Until then, trains were scarcely run on a business basis, nor was the infrastructure managed as such.
- **Inland waterways:** the background is very diverse, nevertheless generally said the access to rivers was not charged, only the use of some locks and port facilities. Barges were run as a business in most countries, but operators were never required to cover the total cost including infrastructure and externalities.
- **Seafaring:** sea and ocean navigation has been a business from very early on. While some ports were subsidized and port labour has been organised for a long time, government intervention was low and the cost coverage extended to all aspects of the business except for external costs.

Overall, it may be observed that no transport mode was ever required to pay for its infrastructure in a full and transparent way. External costs, such as pollution, emission of climate gases, congestion, noise, etc. – as in their name – were only recently identified and as such have never been covered by the respective sectors responsible for them.

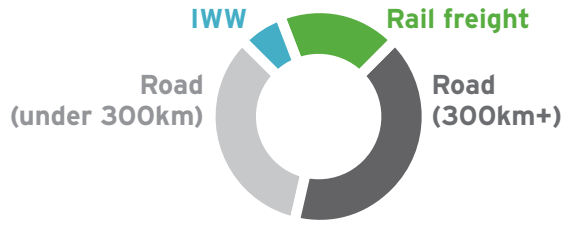
The present day dilemma of transport politicians is to find the path to full cost coverage of infrastructure and external costs of every transport mode. And to do this in a way that is fair and equal. This is a tremendous task that was not yet achieved anywhere.

The first step is to ensure measurement and transparency – to understand the task at hand. The transition can only be designed thereafter. Considering the magnitude of the necessary changes, an elaborate set of temporary compensatory measures needs to be introduced to cover the transitional period to even out the differences, and to enable fair competition – especially among modes that are in direct competition with one another.

The Extent of the Problem

Over the years the European Union has progressed considerably towards solving this issue. The principles of *user pays* and *polluter pays* are universally accepted. Externalities have been identified, researched and quantified. Progress has been made towards making the costs of infrastructure transparent. But implementation has been inconsistent, which creates the sensation of regulatory bias, unfair competitive conditions.

The prevailing imbalance observed in the European Union may be best captured in the distorted modal balance reflected in the graph below: it shows an unnaturally high market share for road haulage in the longer distance segment of the freight transport market. In 2007, the 51 members of the OECD's International Transport Forum reported a market share of road – long- and short-distance combined – of 36% as compared to rail at 43%.



Source: Eurostat 2014 – road split based on ratio in EU Commission Road Vademecuum Report 2010

Foreseeable Policy Action

The European Commission work plan for 2017 foresees meaningful re-balancing action for the relative regulatory conditions of the various modes of transport. Bundled in the Commission's Road Initiatives, a comprehensive set of changes are promised to be put on the table by mid-2017. The revisions will extend to road tolling (*user pays*), internalisation of external costs (*polluter pays*), safety and social issues, as well as enforcement.

The re-balancing of regulatory conditions will likely take several years as a comprehensive legislative compromise needs to be hammered out between the Member States of the EU, and even after passage of the directives, implementation will also take years. Yet the urgency is greater than to have this much time for adjustment. Rail freight is struggling, and it should not be forced to cut back its capacities (again) to achieve a financial sustainability. Rather, the Member States should adapt temporary compensatory measures to balance out the disadvantages suffered by rail freight to bridge over the multi-year period that the regulatory balancing will take.

Guest Comment

JOSEF DOPPELBAUER
Executive Director of the European Union Agency for Railways (EUAR)

Intermodal transport, which provides effective, customer-friendly services, will be the future of freight transport in Europe and beyond. Its road-rail variation, therefore, constitutes an essential element of the vision of the European Union Agency for Railways (ERA), which has the ambition to evolve into a European land transport agency during the next decade.

In view of the European year of multimodality in 2018, ERA has already embraced a number of measures to support intermodal transport across European borders, as well as within. For example, land freight transport requires intense exchange of mass data – with the quality of data determining the quality of services provided. The Agency acts as system authority for telematics applications for freight (TAF) entailing the deployment of harmonised protocols and processes for exchanging information between railway actors to enable railway operators and infrastructure managers to permanently locate freight trains and to exchange documents related to the cargo carried.

The deployment of harmonised protocols and processes will be done in a multimodal environment. Special attention is given to information exchange with emergency systems in freight and integration with other modes of transport. The Agency will improve its Technical Specification for Interoperability (TSI) TAF, as well as its databases and registers, in order to take account of the multimodal dimension of freight transport.

Together with the European Commission, the Agency endorses and supports the newly created Intermodal Task Force in order to improve legal and operational conditions for intermodal operators at the European level. Mandatory cross-border exchange of data shall contribute to increasing the competitiveness of rail freight throughout Europe. The Agency also actively supports Member States through a bilateral exchange to reduce the diverse range of national rules, thereby helping to create one Single European Railway Area (SERA) with clear and simple rules.

"Together with the European Commission, the European Union Agency for Railways endorses and supports the newly created Intermodal Task Force in order to improve legal and operational conditions for intermodal operators at the European level."

Moreover, the need to reduce the carbon footprint of European freight transport – to achieve the decarbonisation aims of the European Union – can only be achieved if the regulatory conditions and the state of the rail infrastructure enable rail freight to increase its market share. This will likely require additional promotional measures.

The Means of CT Operators

Combined Transport is organised mainly by private entities that operate under the prevailing regulatory and market conditions. The European Combined Transport market is not dominated by a single player, nor is it an oligopolistic market. Economic turmoil and the crisis-related adjustments resulted in significant demand fluctuations exacerbated by shift 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:

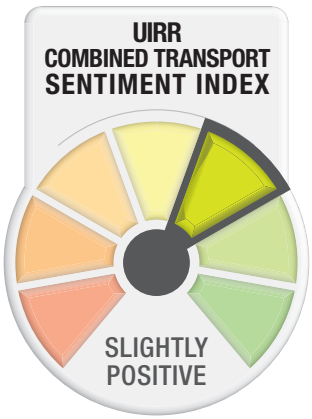
- Introducing new services (trains) better adapted to shippers' needs and following the developments of rail infrastructure;
- Enhancing competitiveness through improved service-quality, application of new technologies, streamlining business practices and reduced costs;
- Identifying clever investments – mostly in IT, rolling stock and terminals – 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.

Business Outlook

The UIRR CT Sentiment Index stood at *slightly positive*, up from *neutral* a year ago, to indicate the optimism of the CT sector for the 12-month period ahead.

The sector's optimism rests on the following:

- **Oil price:** recovered by the end of 2016 to the $50/barrel level,
- **Rail freight support measures:** Italy and Belgium have advanced to become the first two Member States to launch effective temporary compensatory measures to aid rail freight,
- **Cut-back on unfair methods:** several EU Member States commenced with enforcement actions to curb the practices of some longer distance road hauliers whose business models feature creative interpretation of the prevailing laws concerning working rules,
- **Rail infrastructure:** high-profile rail infrastructure developments will come into service, such as the Gotthard base tunnel, in the foreseeable future, as well as the extensive maintenance works on the rail network will bear fruit, thereby improving the productivity of rail freight operations.



UIRR's Year

Activities of the Association Partners and Peers New Members

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 UIRR coordinates the activities of dozens of experts from members, partners and MoU peers together with whom an active and meaningful participation is ensured at every European-level working body relevant 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.

The Platform of ILU Manufacturers is the framework where exchanges with Partners' and Members' experts are facilitated to develop best practice as well as to prepare technical topics and standardisation positions.

UIRR organises own events and also sponsors events by associations to which it belongs such as Rail Forum Europe (RFE) and the European Logistics Platform (ELP).

Ralf-Charley Schultze - President, Violeta Bulc - Commissioner for Transport

Highlights of the Year

The Annual General Assembly featured a unique consultation of UIRR CEOs with Transport Commissioner Violeta Bulc concerning the issues of Combined Transport and the importance for a comprehensive amendment of Directive 92/106. The intense dialogue was part of the meaningful collaboration that UIRR has with the European Commission.

UIRR was among the hosts of 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, to discuss the outlook of rail freight. This spearheaded an entire week of working groups and conferences that considered the issues of rail freight.

UIRR provided a material contribution to the development of the text of the Ministerial Declaration and the Sector Statement to enhance the performance of Rail Freight Corridors (RFC). The association is an active volunteer in the working group that oversees the implementation of the Sector Statement, as well as contributes to further rail-related improvements through its coordination of the speakers of Terminal Advisory Groups of the nine RFCs, and its participation in the various Single European Railway Area working groups.

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

Activities of the Association

Promote

- Written promotion: 11 press releases, 2 position papers, 4 newsletters and the annually published UIRR Report.
- Internet: UIRR's website - www.uirr.com – catered to nearly 120.000 visitors over the year; the UIRR Group on LinkedIn also saw consistent increase in membership.
- Personal promotion: appearance and intervention at 83 public events, conferences and working groups; several hundred one-on-one meetings and discussions with EU parliamentarians and Commission and Council officials, sector stakeholders, as well as shippers and consignors.

Enhance

- Finalization of the EU project "Last Mile"
- Start of the EU project "HubHarmony"
- Material contribution to the ongoing revision of UIC leaflets that concern Combined Transport
- Support to the European Union Agency for Railways in the revision of TSIs as well as in the development of registers – such as RINF – relevant to CT.
- Revision of the dangerous goods labelling brochure (a UIRR best practice guideline) as well as collaboration to produce the CT profile-gauge map (see p.39).
- Partner to the EU Commission to create the www.railfreightlocations.eu portal – a single source for all service facilities relevant to rail freight.
- 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, including the Service Facilities and Border crossing freight subgroups (RU Dialogue) and the Rail Market Monitoring Scheme working group.
- Coordination of Terminal Advisory Group speakers of Rail Freight Corridors.
- Partnering on the ETA project and the delivery of the RNE Train Information System to CT terminals and operators.
- Facilitation of the proliferation of the new data-message format, EDIGES, to ease electronic communication between CT stakeholders.

Board of Directors

"UIRR is the industry association of European road-rail combined freight transport, representing CT operators and terminal managers, while also speaking for technology makers in coordination with national associations promoting intermodal freight transport."

Support

- ILU-Code: the number of owner-key registrations stood close to 900; this contributed to an ILU- or BIC-Code compliance of over 97% of CT consignments in the first quarter of 2017.
- The marking of thousands of loading units was supported through the ILU-Code labelling service.
- UIRR participated in the work of the CESAR Tracking & Tracing System.
- RNE's work was supported to develop and to introduce the TiS for Terminals product, which should aid the functioning of CT terminals.
- Preparatory works were completed for the development of the European ILU-Register.

Functioning of the Association

- 3 new members were inaugurated into the association, alongside the conclusion of 9 partnership agreements and 3 memoranda of understanding.
- Interest Groups: all six UIRR Interest Groups held regular meetings, functioning becoming routine, the Extranet supports work efficiently.
- The IT infrastructure of the association was updated through a move to the cloud and an update of the security protocol.

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 peer group, participate in all initiatives aiming to reach goals that take closer to meeting UIRR's declared objectives.

Partners and Peers

PARTNERS

GOVERNMENTAL BODIES

UIRR
INTERNATIONAL UNION
FOR ROAD-RAIL
COMBINED TRANSPORT

European industry associations typically operate in a complex environment, primarily consisting of various governmental bodies, industry association peers and members. In case of UIRR, this is further complicated by the circumstance that UIRR is not a federation, hence it has no national association members. Therefore, UIRR has aimed to structure its collaboration with national associations committed to the promotion of Combined Transport; this increases the outreach to the Member States. For a similar reason, UIRR has decided to engage with the strategically important manufacturers of CT technology – indicated under "Partners" below.

New Members

KOMBI-TERMINAL LUDWIGSHAFEN (KTL)

Founded in 1999, **KTL Kombi-Terminal Ludwigshafen GmbH** operates a logistics platform on a lease agreement with BASF SE offering following services:

- handling and interim storage
- (first/last mile) trucking
- container storage (dangerous goods specialisation)
- agency services for organising transports
- maintenance and repair of loading units

KTL Terminal was developed in three phases, and presently offers a maximum capacity of about 500.000 units. In 2015 the turnover of KTL amounted to nearly 400.000 in- and outbound consignments.

SOPRON TERMINAL

Sopron Terminal is located on the European rail freight corridors 6, 7 and 11. The container terminal in Sopron, which is equipped with modern loading equipment, plays a major role in the intermodal traffic between Europe's East and West, as well as North and South. Sopron Terminal handles containers, swap bodies and semi-trailers, which is supplemented by offering tailor-made and high-quality logistics and other additional services (customs clearance, road transport, repair and cleaning of containers etc.). GYSEV Cargo, to which the terminal belongs, has decades of experience in providing traction services to CT Operators.

SWISSTERMINAL

Combine.
Move.
swissterminal

The main business of **SwissTerminal (ST)** is the handling and storage of empty and loaded containers. Besides the actual handling and depot this can also comprise the organisation of transportation, the securing of cold chains, an inspection or expert opinion ordered by shipping companies and certified experts. Furthermore, SwissTerminal is certified according to the ISO 9001:2008 Standard. Therewith ST serves as an important interface between all of the involved parties and ensures a smooth course of transportations. Moreover, in the ST workshop maintenance and repair of all types of containers, including reefer and tank containers, are performed. The rental and sale of containers are also part of ST's offer.

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 almost six years ago by UIRR - on 1 July 2011. [www.ilu-code.eu]

Progress of Marking

The number of ILU-Code owner-key registrations stood close to 900 owner-keys in the first quarter of 2017.
At the same time, ILU- and BIC-Code compliance of intermodal loading units taking part in unaccompanied road-rail Combined Transport in the EU have exceeded 97%.

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. Efficient booking, paperless processing and reliable tracking-and-tracing are only possible in case of full compliance.

These owner identification codes form an important pillar of Transport Commissioner Violeta Bulc's transport digitalisation agenda. The Modernised EU Customs Code already requires that all loading units arriving or leaving the European Union by unaccompanied intermodal transport, irrespective of the mode of transport used, be marked with either a BIC- or an ILU-Code. A similar legal requirement is expected to be included during the upcoming revision of Directive 92/106 with respect to shipments travelling within the European Union.

Geographical Distribution of the ILU-Code Owner-Keys

Labelling Service

UIRR supports the labelling effort of loading unit owners by offering a user-friendly service that supplies high quality ILU-Code as well as codification plate stickers. This service can be accessed through the www.ilu-code.eu website.

Controlling Compliance

The electronic controlling of BIC- and ILU-Code validity is supported through a regularly updated list of valid ILU-Codes that can be obtained in a digital format from UIRR. The system description can be found on the ILU-Code website, whereby Terminal Managers and CT Operators can automatically implement the control routine into their IT systems.

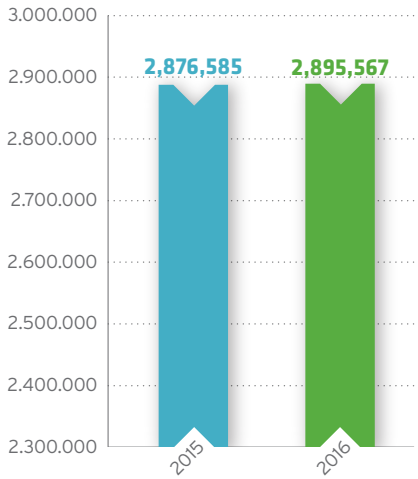
Performance
Statistics 2016

Summary

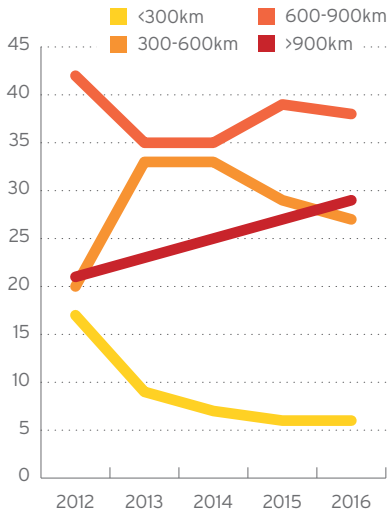
European Combined Transport closed a year of positive growth in 2016: the total number of consignments transported by UIRR operator members increased by 0.66%, whereas output when expressed in tonne-kilometres grew by 3.03%. When measured in tonne-kilometres, cross-border services expanded handsomely, while domestic relations grew by 0.76% and RoLa continued its contraction over the year. Within the cross-border relations, the extra-EU – transcontinental – services expanded by 6%, while intra-EU delivered a healthy 4.4% growth.

	Border Crossing			Domestic			Total		
	2015	2016	2016/2015	2015	2016	2016/2015	2015	2016	2016/2015
Number of consignments	1,938,155	1,949,981	0.61%	938,430	945,586	0.76%	2,876,585	2,895,567	0.66%
containers	1,480,057	1,444,485	-2.40%	868,705	856,808	-1.37%	2,348,762	2,301,293	-2.02%
(craneable) semi-trailers	322,486	380,389	17.96%	59,764	79,146	32.43%	382,250	459,535	20.22%
complete trucks (RoLa)	135,612	125,107	-7.75%	9,961	9,632	-3.30%	145,573	134,739	-7.44%
Average distance	1,029	1,067	3.63%	505	491	-2.63%	878	904	2.96%
Billion tkm	45.87	47.95	4.52%	9.10	8.70	-4.48%	54.98	56.65	3.03%
Number of TEU	3,876,310	3,899,962	0.61%	1,876,859	1,891,172	0.76%	5,753,169	5,791,134	0.66%

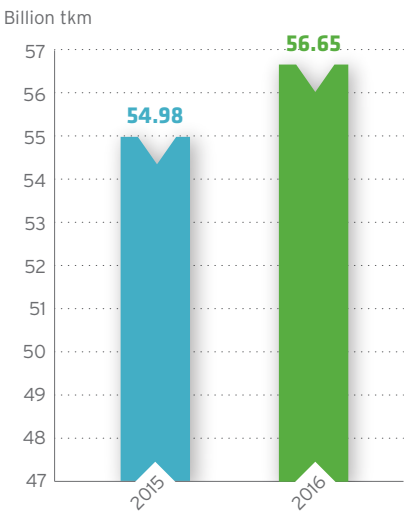
Consignments 2015-2016



Distance Matrix



Tonne-kilometres 2015-2016



Evolution of Combined Transport Traffic

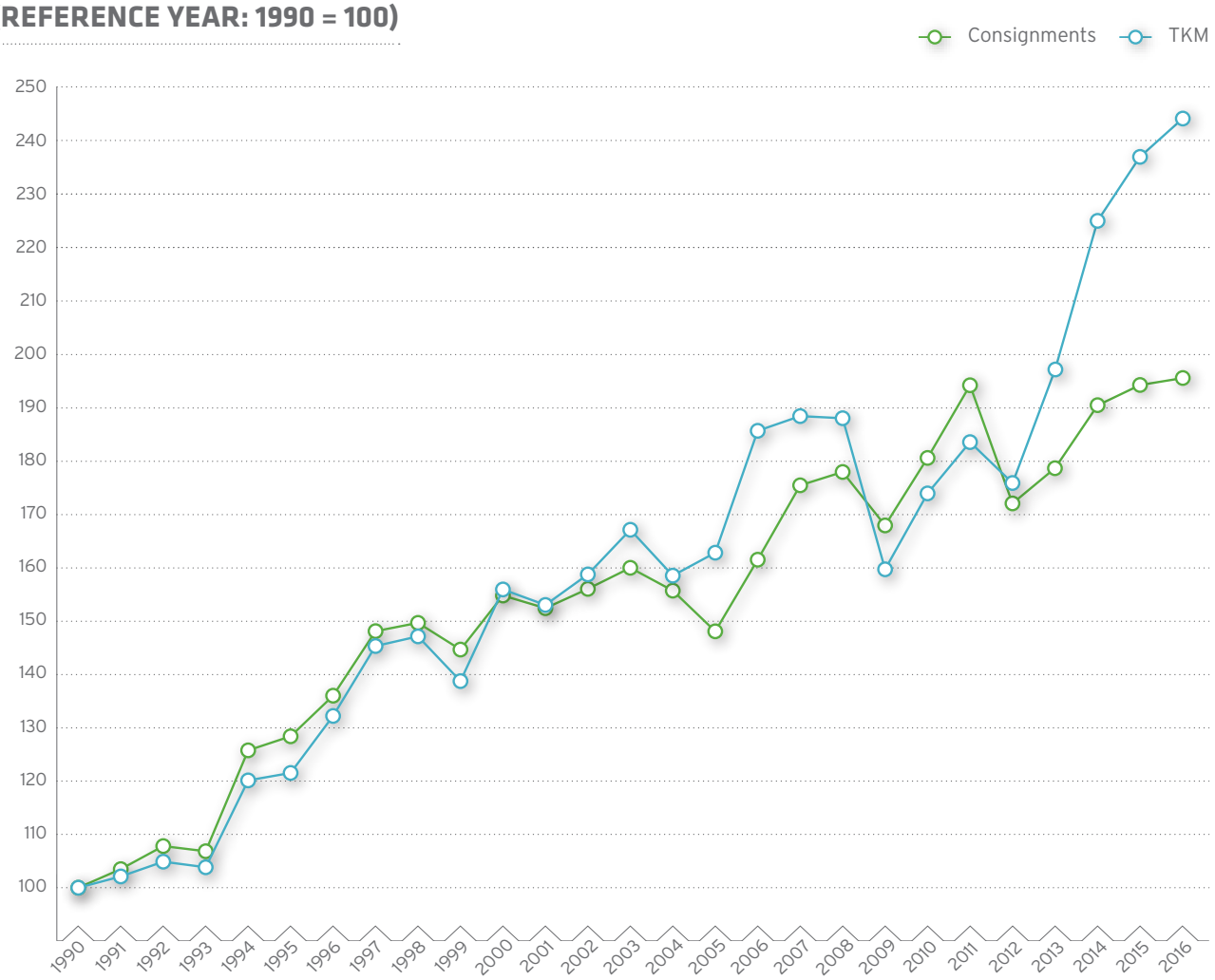
1990 - 2016

COMBINED TRANSPORT	1990	1995	2000	2005	2006	2007	2008
Number of consignments	1,183,361	1,615,364	1,967,072	2,457,579	2,717,751	2,952,543	2,994,625
swap bodies and containers	727,275	1,078,979	1,334,377	1,977,630	2,135,976	2,341,690	2,318,990
(craneable) semi-trailers	241,816	224,029	172,275	164,269	199,800	220,970	246,690
complete trucks (RoLa)	214,270	312,356	460,420	315,680	381,975	389,883	428,945
Total billion tkm	18.68	24.97	35.18	38.84	45.39	46.07	45.97
< 300 km	1%	2%	2%	3%	3%	3%	3%
300 km - 600 km	35%	37%	28%	11%	12%	15%	17%
600 km - 900 km	33%	19%	43%	52%	41%	41%	35%
> 900 km	31%	42%	27%	34%	44%	41%	45%

* Data without Ökombi - Hungarokombi (RoLa operators) | ** From 2013 figures including traffic of new members TEL and FELB
*** from 2015 figures including RCO CZ

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.*

2009	2010	2011	2012*	2013**	2014***	2015***	2016***	% 16/15
2,818,349	3,030,865	3,075,808	2,529,264	2,645,950	2,819,606	2,840,760	2,895,567	0.66%
2,182,569	2,281,746	2,330,918	2,067,488	2,134,004	2,302,831	2,312,397	2,301,293	-2.02%
219,800	300,867	318,567	333,597	375,432	362,654	382,250	459,535	20.22%
415,980	448,252	426,323	128,179*	136,514	154,121	145,573	134,739	-7.44%
38.90	42.37	42.58	39.08	40.74	52.17	54.98	56.65	3.03%
4%	5%	7%	3%	2%	2%	1%	1%	=
16%	16%	12%	12%	21%	17%	14%	12%	↓
36%	42%	44%	47%	39%	36%	36%	34%	↓
44%	37%	37%	38%	38%	45%	49%	53%	↑

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 more than doubled in terms of consignments, whereas the growth rate when measured in tonne-kilometres was over 250%. 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 liberalization result in a substantial price drop in road haulage), 2003-2005 (EU enlargement suddenly opens the market to East European road hauliers, who take advantage of inefficient enforcement of road cabotage, which caused a second price drop of freight rates), and 2009-2013 (the double dips of the global financial and European economic crisis). From 2013 the inclusion of intercontinental transport and decline of shorter haul domestic traffic defines the trend.

By type of loading unit: The transport of complete trucks, or RoLa (accompanied Combined Transport), once over 12% of total CT traffic, has halved in its weight, while the proportion of consignments utilising a craneable semi-trailer increased to about 16% by 2016. The proportion of containers and swap bodies remains stable at about 80% of all UIRR consignments.

Prominent CT-relations: The most important routes of unaccompanied Combined Transport are the ones connecting the North-west European area with South Europe (transalpine corridors with more than 50% of the total volume). RoLa is focused on Transalpine routes. Traffic is dynamically developing on Eastern relations, and even more along the intercontinental routes.

Details of 2016: The UIRR member CT operators realized an increase in consignments on border crossing relations (+0.61%) as well as on domestic routes (+0.76%). Only unaccompanied Combined Transport (UCT) with semi-trailers could increase its share in 2016 especially with an important increase in domestic operations (+32.4% compared to 2015) and over border crossing relations (+18%), while the transfer of complete trucks (RoLa) declined in both segments with a total negative result of 7.4%.

The best performing country relations in 2016 were as follows (relative improvement):

- Hungary vv Italy +8934% (+ 6,000 consignments)
- Austria vv Hungary +1581% (+ 9,000 consignments)
- Italy vv Romania +1464% (+ 4,000 consignments)
- Czech Republic vv Germany +173% (+43,000 consignments)

The best performing country relations in 2016 were as follows (in number of consignments):

- Italy vv Netherlands + 60,000 consignments (+91%)
- Germany vv Sweden + 30,000 consignments (+178%)
- Belgium vv Italy + 10,000 consignments (+5%)
- Germany vv Switzerland + 10,000 consignments (+23%)

Declines have been recorded on several country relations:

- Germany vv Italy -8% (-50,000 consignments)
- Germany vv Netherlands -17% (-22,000 consignments)
- Austria vv Germany -18% (-10,000 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	Consignments-km	Average	Average Weight	Gross Weight	Tonne-km	Techniques, % consignments			
from	to	C	S*km	Distance	t/C	t		ST	SB/CT	SB/CT	RoLa
Country							1,000 tkm		<8,30m	>8,30m	
AT	BE	1,022	1,241,730	1,215	16	16,447	19,983		10%	90%	
BE	AT	1,103	1,340,145	1,215	24	26,319	31,978		26%	74%	
AT	DE	12,926	12,903,976	998	22	290,691	289,619		46%	54%	
DE	AT	33,993	31,673,014	932	25	865,501	803,041	19%	36%	45%	
AT	ES	9	24,246	2,694	30	269	725			100%	
AT	FR	33	46,695	1,415	29	943	1,334			100%	
FR	AT	11	15,565	1,415	16	173	245			100%	
AT	HU	4,929	6,969,854	1,414	21	103,985	146,968		99%	1%	
HU	AT	4,888	6,730,501	1,377	21	103,427	142,029		97%	3%	
AT	IT	8,866	3,283,166	370	26	226,767	86,241	27%	29%	23%	21%
IT	AT	6,625	2,836,202	428	23	152,498	65,949	36%	10%	25%	29%
AT	NL	830	880,011	1,060	26	21,608	22,910		13%	87%	
NL	AT	614	651,007	1,061	26	16,246	17,237		54%	46%	
AT	SI	23,535	7,481,755	318	32	751,227	244,470		41%		59%
SI	AT	19,147	5,980,432	312	35	661,915	216,171		26%		74%
BA	SI	2	997	498	2	5	2		100%		
SI	BA	2	262	131	23	46	6		100%		
BE	BG	178	443,932	2,494	28	4,949	12,343		99%	1%	
BG	BE	96	238,176	2,481	7	698	1,732		97%	3%	
BE	BY	7	8,743	1,249	12	86	107			100%	
BY	BE	43	57,362	1,334	21	910	1,214			100%	
BE	CH	15,657	11,116,736	710	23	356,883	252,432		64%	36%	
CH	BE	14,884	10,854,850	729	14	209,489	152,903		65%	35%	
BE	CZ	114	113,316	994	22	2,542	2,527		65%	35%	
CZ	BE	95	94,335	993	10	973	966		63%	37%	
BE	DE	10,872	7,382,441	679	25	268,436	182,284	1%	67%	32%	
DE	BE	13,112	9,730,549	742	19	247,860	186,259	2%	67%	31%	
BE	ES	14,474	21,456,807	1,482	28	406,245	602,177		55%	45%	
ES	BE	14,782	23,116,312	1,564	19	287,039	452,909		84%	16%	
BE	FR	24,600	14,757,400	600	20	482,658	297,734		43%	57%	
FR	BE	20,632	12,422,865	602	19	396,567	240,321		38%	62%	
BE	HU	4	5,940	1,485	28	111	165		75%	25%	
HU	BE	7	8,353	1,285	17	111	143		54%	46%	
BE	IT	126,896	143,274,818	1,129	26	3,241,334	3,656,263	16%	21%	63%	
IT	BE	110,595	128,846,023	1,165	23	2,552,957	2,960,754	16%	18%	66%	
BE	KZ	21	130,179	6,199	28	582	3,608		100%		
KZ	BE	12	75,424	6,285	8	92	576		100%		
BE	LT	9	17,486	1,943	9	84	162		71%	29%	
LT	BE	6	9,012	1,502	7	42	64		100%		
BE	LU	12,818	4,054,142	316	21	269,224	85,160		56%	44%	
LU	BE	11,460	3,624,426	316	11	127,256	40,291		42%	58%	
BE	NL	150	25,909	173	7	983	170		70%	30%	
NL	BE	192	22,116	115	29	5,574	642		51%	49%	
BE	PL	4,234	4,714,950	1,114	29	121,409	135,200	2%	43%	55%	
PL	BE	3,038	3,595,663	1,184	16	47,537	56,272	1%	36%	63%	
BE	RO	8,799	14,386,365	1,635	24	210,199	343,675	8%	19%	73%	
RO	BE	7,043	11,515,305	1,635	21	145,061	237,175	10%	4%	86%	
BE	RU	405	926,710	2,291	30	12,313	28,210		100%		
RU	BE	269	670,036	2,495	11	2,939	7,335		96%	4%	
BE	SE	229	218,695	955	27	6,163	5,886	6%	52%	42%	
BE	UZ	6	40,686	6,781	26	158	1,070		100%		
UZ	BE	2	9,378	6,252	8	12	73		100%		
BY	DE	31	20,191	662	18	554	367		7%	93%	
DE	BY	145	96,031	662	17	2,429	1,609		18%	82%	
BY	ES	15	80,010	5,334	19	291	1,552			100%	
ES	BY	1	5,615	5,615	27	27	153			100%	
CH	DE	20,056	12,717,288	634	16	319,924	206,737	25%	53%	22%	
DE	CH	32,730	20,662,718	631	26	841,971	529,103	17%	58%	25%	
CH	DK	7	7,818	1,203	23	148	178		100%		
DK	CH	25	29,433	1,177	8	206	242	8%	92%		
CH	ES	98	177,503	1,821	26	2,569	4,677		100%		
ES	CH	1	1,066	1,066	28	28	30		100%		
CH	FR	14	15,741	1,166	8	102	119		100%		
CH	IT	1,161	378,903	326	12	14,369	4,691	1%	43%	56%	
IT	CH	2,234	817,845	366	22	48,666	17,816	1%	62%	36%	
CH	NL	8,940	8,096,324	906	20	177,109	160,395		66%	34%	
NL	CH	10,066	8,982,810	892	20	196,995	175,799		63%	37%	
CH	SE	7	9,624	1,481	16	107	158	77%	23%		
SE	CH	12	21,303	1,775	27	326	578		100%		
CN	DE	20,314	217,479,000	10,706	20	415,412	4,470,099		8%	92%	
DE	CN	15,845	168,265,000	10,619	21	338,863	3,624,192		14%	86%	
CZ	DE	33,660	27,338,570	812	18	596,482	478,752	21%	46%	33%	
DE	CZ	33,874	27,726,820	819	22	736,220	592,549	28%	39%	33%	
CZ	PL	14	9,369	694	30	403	280		7%	93%	
CZ	SI	6,397	5,465,661	854	14	88,682	75,770		100%		
SI	CZ	6,371	5,445,039	855	13	85,805	73,334		100%		
DE	DK	3,036	2,571,416	847	27	83,270	70,567	34%	27%	39%	
DK	DE	1,657	1,120,555	676	6	9,726	6,577		27%	73%	
DE	ES	21,220	31,821,967	1,500	26	546,706	818,453		80%	20%	
ES	DE	25,203	34,018,806	1,350	18	454,017	612,789		95%	5%	
DE	FI	52	79,738	1,548	24	1,238	1,917		90%	10%	
FI	DE	43	67,013	1,577	8	339	535		95%	5%	
DE	FR	9,678	10,366,715	1,071	27	261,490	280,056		55%	45%	
FR	DE	7,588	8,264,189	1,089	16	122,192	132,516		58%	42%	
DE	GR	987	2,430,143	2,463	28	27,761	68,391	14%	65%	21%	
GR	DE	484	1,191,058	2,461	13	6,412	15,782	3%	61%	36%	
DE	HU	9,179	10,276,490	1,120	26	243,234	272,287	54%	19%	27%	
HU	DE	9,649	10,432,676	1,081	19	183,079	197,974	51%	15%	34%	
DE	IT	372,586	311,808,965	837	28	10,283,269	8,514,494	35%	30%	23%	13%
IT	DE	213,142	178,728,134	839	23	4,968,424	3,921,845	33%	19%	26%	22%
DE	KZ	10	55,660	5,566	25	246	1,368		100%		
KZ	DE	43	215,168	5,063	21	894	4,527		100%		
DE	LU	1,415	417,425	295	25	34,832	10,275	51%	2%	47%	
LU	DE	1,027	302,965	295	22	23,027	6,793	39%	1%	60%	
DE	NL	59,195	28,549,361	482	21	1,238,017	604,583	10%	47%	43%	
NL	DE	48,518	20,588,828	424	19	918,813	400,426		46%	54%	
DE	NO	547	835,903	1,528	25	13,704	20,938		61%	39%	
NO	DE	239	357,601	1,499	21	4,890	7,450	4%	43%	53%	
DE	PL	24,497	19,675,618	803	21	521,958	413,867		40%	60%	
PL	DE	21,475	19,798,152	922	11	238,915	224,818		39%	61%	
DE	RS	88	199,772	2,283	10	889	2,029		100%		
RS	DE	250	364,520	1,461	23	5,629	8,224		100%		
DE	PT	223	576,801	2,587	27	5,958	15,412		37%	63%	
PT	DE	179	490,629	2,741	13	2,273	6,229		26%	74%	

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	RO	1,393	1,797,270	1,290	30	41,716	53,823	10%	89%	1%	
RO	DE	715	838,147	1,172	12	8,725	10,228	9%	91%		
DE	RU	1,728	3,714,615	2,150	18	30,750	64,563		37%	63%	
RU	DE	1,707	3,933,336	2,305	17	29,159	66,994		18%	82%	
DE	SE	24,772	24,998,287	1,009	26	636,809	642,622	67%	16%	17%	
SE	DE	22,300	22,953,065	1,029	20	450,163	463,117	69%	14%	17%	
DE	SI	1,632	1,601,654	982	32	51,558	50,614		71%	29%	
SI	DE	1,666	1,262,062	758	8	13,878	10,513		100%		
DE	SK	229	418,957	1,834	45	10,255	18,802		100%		
SK	DE	52	71,980	1,384	8	405	560		100%		
DE	TR	3,228	10,081,679	3,124	28	90,243	281,889		82%	18%	
TR	DE	2,312	7,170,719	3,102	12	28,436	88,194		68%	32%	
DE	YO	5	8,307	1,846	21	96	177		33%	67%	
DK	BE	637	535,717	841	23	14,598	12,277	88%		12%	
DK	IT	6,081	7,293,105	1,199	29	174,164	208,880	61%	5%	34%	
IT	DK	5,039	7,466,884	1,482	26	131,342	194,632	56%	7%	37%	
DK	NL	253	245,916	972	15	3,828	3,721	88%		12%	
NL	DK	472	458,784	972	25	11,858	11,525	88%		12%	
ES	CN	22	31,174	1,417	10	222	314			100%	
ES	IT	2,119	2,442,855	1,153	27	58,178	67,070		76%	24%	
IT	ES	1,111	1,299,632	1,170	25	28,090	32,874		83%	17%	
ES	NL	25	63,879	2,555	9	235	599		93%	7%	
NL	ES	187	394,261	2,114	30	5,607	11,852		14%	86%	
ES	PL	114	154,646	1,357	25	2,840	3,853		28%	72%	
PL	ES	30	34,751	1,158	9	283	328			100%	
ES	RO	26	88,270	3,395	29	764	2,594		100%		
ES	RU	1	1,249	1,249	32	32	40		100%		
FR	IT	20,253	18,519,985	914	25	505,722	463,711		13%	87%	
IT	FR	29,147	26,317,006	903	21	598,310	543,286	2%	62%	36%	
FR	LU	11,756	7,368,164	627	18	212,920	136,830	51%	5%	44%	
LU	FR	12,080	7,552,688	625	26	312,673	181,960	46%	5%	49%	
FR	NL	1,855	2,034,935	1,097	12	21,380	44,086		14%	86%	
NL	FR	1,565	1,992,165	1,273	25	39,624	50,976		14%	86%	
GR	BE	1	890	1,780	8	4	7		100%		
HR	DE	31	32,494	1,065	7	223	238		100%		
HR	HU	1,969	1,114,454	566	7	13,783	7,801		6%	94%	
HU	HR	2,679	1,516,314	566	6	16,074	9,098		22%	78%	
HR	RS	164	103,812	633	22	3,608	2,284		85%	15%	
RS	HR	92	58,236	633	21	1,932	1,223		65%	35%	
HR	SI	390	113,100	290	13	5,070	1,470		45%	55%	
SI	HR	379	28,262	75	15	5,647	421		100%		
HU	IT	3,363	2,313,306	688	10	32,780	23,933		45%	55%	
IT	HU	2,690	1,801,490	670	15	40,723	27,277		45%	55%	
HU	NL	711	1,130,558	1,590	21	14,874	23,651		80%	20%	
NL	HU	1,569	2,162,962	1,379	24	37,280	51,410		46%	54%	
HU	RO	882	864,262	980	19	16,769	16,441		97%	3%	
HU	RS	4	1,743	498	13	44	22		100%		
HU	SI	11,719	8,000,561	683	14	167,043	114,040		100%		
SI	HU	21,351	14,727,279	690	15	319,219	220,188		100%		
HU	UA	106	108,120	1,020	18	1,874	1,911			100%	
IT	BY	61	104,859	1,719	20	1,220	2,097		65%	35%	
IT	LT	2	1,233	617	20	41	25		86%	14%	
LT	IT	38	21,750	572	29	1,108	634		83%	17%	
IT	LU	6,671	8,178,646	1,226	20	131,205	160,857	99%		1%	
LU	IT	6,585	8,073,210	1,226	25	167,864	205,801	99%		1%	
IT	NL	63,219	78,651,730	1,244	22	1,388,222	1,723,338	16%	38%	46%	
NL	IT	62,780	65,168,193	1,038	26	1,662,034	1,717,642	8%	41%	51%	
IT	NO	56	47,963	856	29	1,652	1,415		100%		
NO	IT	3	2,700	900	30	91	82		100%		
IT	PL	465	287,043	617	28	13,004	8,028		12%	88%	
PL	IT	199	103,266	519	28	5,611	2,912		10%	90%	
IT	RO	1,968	2,768,575	1,407	17	33,897	47,686	5%	5%	90%	
RO	IT	2,099	2,981,611	1,421	11	22,841	32,453	5%	6%	89%	
IT	RU	26	15,952	614	32	823	505		100%		
IT	SE	1,436	2,658,546	1,852	27	38,361	71,045	38%	33%	29%	
SE	IT	4,329	6,473,629	1,495	30	128,895	193,057	54%	22%	23%	
IT	TR	448	944,684	2,109	28	12,493	26,344		32%	68%	
TR	IT	535	1,126,346	2,105	9	4,740	9,979		47%	53%	
KZ	NL	7	40,078	6,166	8	53	327		100%		
NL	KZ	12	73,812	6,151	29	346	2,126		100%		
KZ	PL	35	164,990	4,714	7	258	1,214		100%		
PL	KZ	79	358,667	4,569	28	2,222	10,152		100%		
LT	PL	117	58,050	496	23	2,714	1,346		68%	32%	
PL	LT	978	577,703	591	15	14,847	8,774		67%	33%	
NL	BY	41	59,286	1,446	12	506	732		1%	99%	
NL	LT	4	5,456	1,364	7	27	37			100%	
NL	PL	545	820,017	1,506	25	13,619	20,510	7%	41%	52%	
PL	NL	423	777,474	1,838	17	7,084	13,020		52%	48%	
NL	RO	869	2,084,731	2,399	29	24,793	59,479		91%	9%	
RO	NL	255	430,869	1,693	9	2,221	3,761		100%	0%	
NL	RS	168	52,635	313	30	4,959	1,554		100%		
RS	NL	3	1,390	556	7	18	10		100%		
NL	RU	153	339,660	2,220	31	4,775	10,599		100%		
RU	NL	63	174,969	2,777	9	543	1,508		100%		
NL	UZ	2	8,982	4,491	20	39	177		100%		
UZ	NL	1	5,004	5,004	8	8	40		100%		
NO	PL	1	937	1,874	8	4	7		100%		
PL	NO	1	1,315	1,315	30	30	39		100%		
PL	BY	17	8,100	491	9	151	74		48%	52%	
PL	RU	206	516,442	2,507	26	5,412	13,568		100%		
RU	PL	142	353,333	2,488	7	1,052	2,618		100%		
RO	UA	2	1,604	802	7	14	11			100%	
UA	RO	2	690	345	30	59	20			100%	
RS	SI	62	33,135	534	3	212	113		100%		
SI	RS	86	37,118	432	20	1,683	726		100%		
RU	FR	3	7,465	2,488	7	22	56		100%		
SI	IT	1,758	465,132	265	3	5,339	1,413		100%		
SI	MK	3	2,847	949	5	15	15		100%		
SI	SK	18,321	14,619,242	798	13	231,101	184,407		100%		
SK	SI	13,613	11,151,497	819	7	101,145	82,856		100%		
UA	DE	2	690	345	7	14	5			100%	
UZ	DE	2	17,752	8,876	8	16	138		75%	25%	
TOTAL		**1,949,981**	**2,117,565,938**	**1,067**	**23**	**44,947,642**	**47,948,267**	**20%**	**37%**	**37%**	**6%**

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 - RoMo - RSO - RH - ECM
Agency: SI
Total traffic: 290,000 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 - RoMo
Agency: IT
Total traffic: 245,000 TEU
Revenue: € 32 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: 85,000 TEU
Revenue: n/a

CARGO TERMINAL ENNS
Ennshafenstaße 45
A - 4470 Enns
Tel.: +43 722 381 347
Fax.: +43 722 381 348
office@ct-enns.at
www.ct-enns.at

Activity: TTM
Agency: AT
Total handlings: 310,000 TEU
Revenue: € 8 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 - SK
Total traffic: 50,000 TEU
Revenue: € 6 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: 585,000 TEU
Revenue: € 201 million

CFL INTERMODAL
Zone industrielle "Riedgen"
L - 3451 Dudelange
Tel.: +352 4996 0001
Fax: +352 4996 0150
info@cfl-intermodal.lu
www.cfl-intermodal.lu

Activity: UCT
Agency: LU
Total traffic: 113,000 TEU
Revenue: € 26 million

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

Activity: UCT
Agency: ES
Total traffic: 64,000 TEU
Revenue: € 3 million

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: 130,000 units
Revenue: € 7 million

CROKOMBI
ul Hebranga 10
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: 9200 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 - UCT
Agency: IT
Total handlings: 74,000 units
Revenue: € 11 million

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.: +41 588 558 000
Fax: +41 588 558 000
info@hupac.com
www.hupac.com

Activities: UCT - TTM - RSO - ECM - RU - CA
Agencies: AT - BE - CH - DE - DK - ES - HU - IT - NL - PL - RO - RU - SE - SI
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 - RSO
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
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

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

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

Activities: UCT - TTM -RSO - ECM - RU
Agencies: CZ - DE - ES - IT - NL - SE
Total traffic: 1,960,000 TEU
Revenue: € 446 million

KTL
Am Hansenbusch 11
D-67069 Ludwigshafen
Tel.: +49 621 659 130
www.ktl-lu.de

Activities: TTM
Agency: DE
Total traffic: n/a
Revenue: n/a

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 - UCT
Agency: IT
Total handlings: 20,000 units
Revenue: € 13 million

NAVILAND CARGO
26 Quai Charles Pasqua
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: € 108 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.eu
www.novatrans.eu

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: n/a
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

RAIL CARGO OPERATOR - CSKD LTD.
Zerotinova 1132/34
CZ-13000 Praha 3
Tel.: +402 220 193 200

Activities: UCT - RSO
Agency: AT - CZ - HU - SK
Total traffic: n/a
Revenue: n/a

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: 198,000 units
Revenue: € 7 million

RAILPORT ARAD
PO Box 10
RO-315200 Curtici FN
Tel.: +40 357 100 189
Fax: +40 357 100 190
office@railportarad.ro
www.railportarad.ro

Activity: TTM
Agency: RO
Total handlings: 90,000
Revenue: € 2.5 million

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: RoMo - ECM
Agencies: CH - DE - IT
Total traffic: 206,000 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

SOPRON TERMINAL
Ipar korut 21
HU-9400 Sopron
Tel.: +36 99 577 406
kontener@gysevcargo.hu
www.gysevcargo.hu/szolgaltatasaink/kombinalt_fuvarozas

Activities: TTM
Agency: AT - HU
Total traffic: n/a
Revenue: n/a

SWISSTERMINAL
Flacksacherstrasse 7
CH-4402 Frenkendorf
Tel.: +41 619 064 545
www.swissterminal.com

Activities: TTM
Agency: CH
Total traffic: 222,000 TEU
Revenue: n/a

T3M
11 rue Maryse Bastié
ZI de la Lauze
F - 34430 St Jean de Vedas
Tel.: +33 4 6727 1851
info@t3m.fr
www.t3m.fr

Activities: UCT - TTM - RH - RSO
Agency: FR
Total traffic: 209,000 TEU
Revenue: € 40 million

TEL (TRANS EURASIA LOGISTICS)
Bellevuestraße 3
D - 10785 Berlin
Tel.: +49 30 297 54 804
www.trans-eurasia-logistics.com

Activity: UCT
Agencies: DE - CN - RU
Total traffic: 42,000 TEU
Revenue: n/a

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.

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			●	138,773	5,000	-	2	Brennersee	3
Salzburg Hbf ROLA	Salzburg			●	7,425	5,000	-	2	Salzburg Hbf	
St. Michael CCT	St. Michael	●			4,589	15,000	3	2	St. Michael	5
Villach Süd CCT/ROLA	Villach	●		●	36,886	70,000	5	6	Villach Süd	5
Wels Vbf CCT/ROLA	Wels	●		●	193,671	120,000	6	9	Wels Vbf	
Wien Süd CCT	Vienna	●			87,939	250,000	2	4	Wien Zentral-verschiebebhf	5
Wolfurt CCT	Wolfurt	●			110,261	54,000	6	5	Wolfurt	
Wörgl ROLA	Wörgl			●	153,363	40,000	-	3	Wörgl	3
CTS	Salzburg	●			245,000	120,000	2	5	Salzburg HBF	3
CTE	Enns	●	●		305,000	170,000	3	9	Enns HBF	3, 5
Cirkeldijk	Antwerp	●			61,560	52,000	6	4	Antwerp Berendrecht	1, 2, 8
Combinant	Antwerp	●			131,335	102,000	4	5	Combinant (BASF)	1, 2, 8
Euroterminal	Genk	●			31,856	80,000	3	4	Genk Goederen	1, 2, 8
HTA	Antwerp	●			79,560	53,000	3	5	Antwerpen	1, 2
Main Hub	Antwerp	● (as from 8/12/2016)			3,036	202,497	6	8	Antwerp North	1, 2, 8
Zomerweg	Antwerp	● (up to 31/12/2016)			66,813	77,000	6	4	Antwerp Angola	1, 2, 8
Aarau	Aarau	●			43,711	27,000	3	5	Aarau	2
Basel	Basel	●	●		55,588	12,000	1	1	Basel	
Basel	Basel	●			41,939	17,000	3	2	Basel	2
Birsfelden	Birsfelden	●	●		30,654	15,600	1	1	Basel	
Frenkendorf	Frenkendorf	●			96,099	45,000	2	3	Basel	1
Z 4	Chiasson	●			6,346	7,000	1	1	Chiasso	1
KTL	Ludwigshafen	●			354,000	305,000	10	25	LU-Oggersheim	1
TSG	Singen	●			73,592	63,000	3	4	Singen	1
Avignon Courtine	Avignon	●			70,350	85,296	6	10	Avignon Champfleury	2, 3
CEF	Mouguerre	●			24,000	35,000	3	4	Bayonne	4
CLESUD	Miramas	●			42,000	490,000	4	2	Miramas	2, 6
Cognac	Cognac	●			7,718	6,478	2	3		
Geverey	Dijon	●			2,150	15,000	2	4		
Hourcade	Bordeaux	●			68,136	48,755	5	7		
Marseille	Marseille	●			51,047	41,363	6	6		
Noisy	Noisy le Sec	●			21,350	70,000	4	10	Noisy le Sec	4
Saint Jory	Toulouse	●			15,663	52,595	4	4		
Valenton	Bonneuil	●			77,262	120,000	5	7	Valenton	2, 4
Vénissieux	Lyon	●			113,973	45,000	2	5	Vénissieux	2, 6
Rail Cargo Terminal-BILK Co.Ltd.	Budapest	●			101,425	223,000	7	7	Soroksár-Terminal	6, 7
Sopron Terminal	Sopron	●			n/a	100,000	3	6	Sopron	6, 7, 11
EMT	Trieste	●	●		73,907	70,000	4	4	Trieste Campo Marzio	5, 6
Giovinazzo Terminal	Giovinazzo	●			12,550	30,000	2	3	Giovinazzo	5
Lugo Terminal	Lugo	●			4,500	190,000	3	8	Lugo	5
TBG	Busto/ Gallarate	●			419,358	243,000	12	18	Gallarate	1
Piacenza	Piacenza	●			3,846	55,000	5	3	Piacenza	5
HUB Terminal Poznan	Gądki	●			87,899	320,000		5	Gądki station	5, 7
Terminal Dąbrowa Górnicza	Dąbrowa Górnicza	●			16,623	225,000		4	Dąbrowa Górnicza Towarowa	8
Terminal Kontenerowy Pruszków	Pruszków	●			15,277	32,976		3	Pruszkow station	5, 8
Railport Arad	Curtici	●			52,788	8,000	4	5+2	Curtici	6
Daventry	Daventry	●			n/a	12,000	2	2	Rugby	2

CT RAILWAY GAUGE MAP 2016

Combined Transport
Map of the codified lines for **Swap bodies**

Legend:	Width ≤ 2550mm	Width >2550 ≤ 2600mm
	C 22	C 341
	C 32	C 351 C 349 (SNCF)
	C 45	C 364
	C 70	C 400
	C 80	C 400
	C 80	C 410
	see remarks (directly on the route or as additional text box)	

The admissible edge heights (cm) of the loading units carried on the wagons are calculated as follows:

C ?? Codification number added by the numer '245' (example: C 22 = 22+245 = 267 cm)

C ??? Codification number reduced by the number '85' (example: C 341 = 341-85 = 256 cm)

Transshipment facility / terminal

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INTERNATIONAL UNION FOR ROAD-RAIL COMBINED TRANSPORT

Remark: The Polish lines aren't codified. The values of the codification are indicated values (non-official). Authorization for exceptional consignment is necessary for traffic in Poland.

For the UK traffic through the Channel the mentioned codifications are only valid for loaded swap bodies:

Wagon	Lignes	Width (mm)		
		2500	2550	2600
45	a	S 18 (S21)*	S 18 (S21)*	-
	b	S 32	S 30	S 360
	c	S 32	-	-
45	a	S 30 (S34)*	S 21 (S25)*	-
	b	S 44	S 42	-
	c	S 44	-	-

* only with flat roof

Remarks: lines might be used under multilateral agreements. For transport in Poland it is necessary to obtain an authorisation for an exceptional transport.

INFRABEL Right On Track
I-TMS.424
Building South Crystal
Avenue Fonsny,13
B-1060 Bruxelles
N°: 10961-UIRR.cdr

23/09/2016

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