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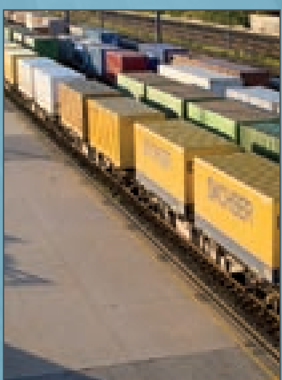
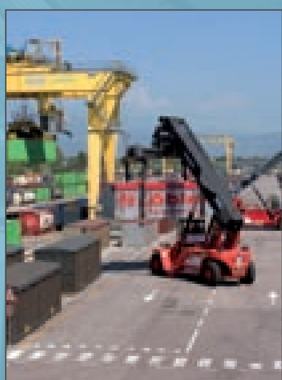
International Union of combined Road-Rail transport companies

UIRR

Report 2007






IMPRESSUM

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PREFACE

Eugenio Muzio - Chairman of the Board UIRR

With gross domestic product up by 2.6%, 2007 was a good but contrasting year for the EU economy. Although the first six months followed on from the good year seen in 2006, the second suffered from the effects of the frantic rise in oil prices and the decline of economic activities across the Atlantic. This is also true for road-rail combined transport (CT). In addition to the slowdown in trade, the results were affected by the strikes at the SNCF and the DB, and the road transport strikes in Italy.

In spite of this, once again the UIRR demonstrated the vitality of the work of its 20 member companies. Indeed, internally their traffic rose by 11%, reaching more than 1 million consignments, and 8% internationally, rising to approximately 2 million transportation operations.

Even so, these excellent results do not reflect the true potential of CT, because of a number of persisting obstacles. In spite of several initiatives, the railway undertakings have not managed to offer a good, constant quality of service yet. Secondly, the increasing saturation of many terminals is another factor slowing down the acquisition of new traffic, as the aim on any route is to get a daily train into service quickly in order to achieve flexibility comparable to journeys by road.

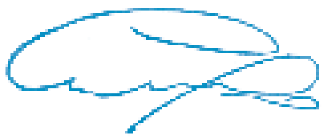
There were a number of significant political initiatives from the EU to support our members' action on the ground in 2007, which Mr J. Barrot, Vice-President of the European Commission, designated the "year of rail". For instance, the "European rail network giving priority to freight" project could offer a partial response to the lack of infrastructures, provided that its financing is in place.

As for the consultation on the insourcing of external costs, it clearly brought out huge support from the sector for steps in this direction, starting out from the fact that the planned measures will create framework conditions which are fairer to modes which definitely cause less pollution.

To our great satisfaction, the liberalisation of rail freight transport is intensifying in stages and should eventually help to bring about a range of services which can meet demand from the market. A stimulating dynamic has been introduced, leading new operators to encourage the modal conversion of road transport to CT. This interest in CT is also growing in Eastern Europe, both in continental and container traffic.

In 2007, the UIRR worked hard to remain the undisputed voice of CT in dealings with the Authorities, by taking up frank, constructive positions, in all fields which affect its members' business activities. It is also acknowledged by the European Rail Agency (ERA) as the major player in dealing with technical questions about CT. We would like to thank its Management for having agreed to our request to appoint a contact person for intermodal transport.

Finally, the UIRR is aware of its own need for a more efficient structure in the medium term. In order to achieve this, it has entered into a closer dialogue with the rail organisations to check whether some work can be carried out on a more cooperative basis in fields of common interest, with a view to bring about still greater support for the growth of our technique which by promoting transfer of traffic to rail is undisputedly beneficial.



Eugenio Muzio

THE UIRR OFFICE IN BRUSSELS

Rudy Colle - Director General UIRR

20 years working for Combined Transport

This summer marks twenty years since the UIRR first set up a permanent head office in Brussels, taking over from the system of rotating addresses it had used up until then, depending on who was running its administrative department at any given time.

Indeed, this head office, known as the Liaison Office, opened on 1st July 1988, the Board of the day having wisely decided that it should be located in the capital of Europe.

A part of a container laid right on the apron of the Brussels-West railway station was provided by our Belgian member company TRW and it was Mr M. Burkhardt, who was the manager seconded from Kombiverkehr (DE) at the time, who made the arrangements for the first office.

In addition to the feeling of pride at having "our own" address, this facility marked a key stage in our organisation's career, because the choice of Brussels confirmed the resolutely European side of the UIRR and its desire to forge closer ties with the political decision-makers who had moved there, as other professional organisations operating on a large enough scale had already done or would later do.

Other key moments soon followed, including the conversion of the UIRR from a de facto association into a cooperative company under Belgian law with effect from 1991, along with the strengthening of its staff, and later on the opening up to a wider membership, for which all CT operators were eligible.

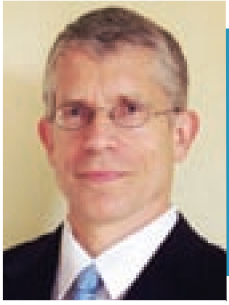
First UIRR office in Brussels

Supported by its Board, ever since it was first set up the Office has worked hard to be part of any debate of a legislative nature and also with technical-operational or commercial scope likely to support, or vice versa to hinder the development of CT, a transport technique which offers enormous economic and environmental value.

In this way it has – effectively may I say – responded to the twofold hopes invested in it: obviously that of upholding the interests of its member companies, but also that of acting as an adviser 'in the field' for authorities which need to set out the most appropriate framework conditions for our sector.

This is a fine opportunity to be most satisfied with the excellent contacts we have been able to maintain over all of these years with all the people who - like ourselves, and in various capacities - are involved in promoting combined transport and who thus contribute to a more comprehensively sustainable transport system.

Working either on its own or with their help, the Office has initiated, co-ordinated or supported projects which have helped to consolidate the competitiveness of CT, so many that we have now lost count – from the targeted drawing up of legal texts to the improvement of equipment, from systems for the exchanging of information and marketing conditions to the large numbers of projects involving the launching of new services and schemes. It goes without saying that it will carry on devoting itself to this work with the same conviction that this is a job worth doing.



THE DIOMIS STUDY ON THE FUTURE OF COMBINED TRANSPORT

Martin Burkhardt - Director General UIRR

People often underestimate just how dynamic Combined Transport is. In actual fact, its growth outstrips even that of road freight transport, whereas total rail goods traffic is virtually stagnating.

In 1989, A.T. Kearney's study commissioned by the UIC and the UIRR caused a sensation in the sense that, under precise conditions, it forecast a tripling of international CT between 1987 and 2005. The reality actually exceeded even this optimistic scenario.

For the purposes of supporting the development of CT, the UIRR is continuing to get involved in various projects, including the major DIOMIS (Developing Infrastructure use and Operating Models for Intermodal Shift) study. This study confirms the enormous potential for growth which remains unchanged. Its final report "Agenda 2015 for Combined Transport in Europe" is designed to shake up the decision-makers and encourage them to make a larger number of transfers of traffic to the railways. The EU Member States are asked to put more into this. However, first and foremost DIOMIS shows the participants what they can do by themselves.

The States are expected to give even greater importance to extending the capacities of conventional routes for rail freight transport. This does not necessarily mean expensive new routes; often it is simply a matter of getting rid of local bottlenecks and creating conditions designed to promote longer, heavier trains. Likewise we need an agreement which must be as wide-ranging in order to bring about a harmonised increase in the capacities of terminals and routes on international lines.

The study sets out an analysis of ideas and resources which are already being used by various railway undertakings and CT operators with a view to transferring more traffic to the railways: for instance by strengthening the use of full trains and shuttles

which could lead to a more effective exploitation of the infrastructure. By improving train punctuality, incoming wagons could be available again to carry freight on a return journey on the same day: productivity gains could be reached by making better use of the wagons and engines.

The optimisation of commercial models and the use of scheduling software would also help to increase the use of the capacities. The use of the most suitable types of wagon can increase the number of loading units which can be transported with given train lengths.

Closer co-ordination between long distance rail transport and the last mile feeder service in the terminals, longer opening hours, a better distribution of train arrivals and departures, in-house marshalling services, automatic identification of the loading units, financial incentives for customers for a rapid removal of the loading units – there are numerous ways of increasing the productivity of transhipment areas.

The participants in the combined transport chain will find a large number of ideas on how to improve the range of CT services in the results of the DIOMIS study. If they are put into practice, we hope that in 2015 we will see that the development of combined transport has once again exceeded even bold forecasts.

COMBINED TRANSPORT: THE FUTURE OF RAIL FREIGHT

Denis Petitmengin - Director General Novatrans

We have seen a number of unmissable signs over the last few months.

First of all, the three major French players in combined transport, Novatrans, Naviland Cargo and Rail Link, have all redeployed their traffic. After a resizing of transport plans from 2004 to 2006, we are now seeing a new growth in combined transport, both for national and international traffic. For its part and if we leave corporate events (strikes) at the French national railway company SNCF out of the equation, there is a positive trend of +6% for Novatrans' French traffic, +14% for bilateral traffic and +3% for transit traffic.

New railway undertakings such as B CARGO, CFL, EURO CARGO RAIL, EUROPORTE 2, SECO-RAIL, VEOLIA CARGO, VFLI have arrived on the Réseau Ferré de France (French Rail Network) and have gone from a market share of 0.05% in 2005 to 0.4% in 2006 and 3.2% in 2007.

These undertakings are running on 46% of the French network and account for 80 trains per day, 20 of them international traffic. Some of them are active not only in conventional traffic, but also in combined transport, both over long distances, e.g. ECR and VEOLIA CARGO, and local services, e.g. SECO-RAIL and VFLI.

Finally, in France there is a strong political will to encourage rail freight in general, and combined transport in particular, with the creation of a "super-Ministry" for Ecology, Energy, Sustainable Development and Territorial Development which, in 2007, began work on the "Grenelle de l'Environnement" (Grenelle environmental forum), a multidisciplinary consultation on environmental subjects leading to government initiatives.

As part of this, this Ministry is engaging in a number of initiatives on energy saving, reducing CO^2 emissions and modal transfer, the work of which will shortly be published along with an action plan. Specifically, rail freight should grow by 25% by 2012 and combined transport should record a doubling of its traffic over the same period.

There is another important element which needs to be underlined: the mission statement given by the French President to Guillaume Pepy, the new Chairman of the SNCF, whose first flagship project involves rail freight and more particularly "the starting up of a range of competitive multimodal services incorporating the other modes of goods transport".

The last point which allows room for optimism comes from the development prospects for journeys made by goods within the European Union. Road transport will be the primary beneficiary of this but it should be supported by complementary solutions such as road-rail CT whose relative share should increase considerably. The sharp interest shown by customers in the Novatrans and TRW's joint stand at SITL 2008 in Paris, one of the major trade shows for transport in Europe, fits into this logic.

So we are seeing confirmation that CT really is the future of rail freight, also in France.

DEVELOPING TC IN SOUTH-EASTERN EUROPE

R. Svetek - Director General Adria Kombi

Slovenia's accession to the European Union has been a big step forward in the country's overall development.

To meet the related huge economic challenge, the Slovene business community has been using the geographical position of this country, its profound knowledge of the region and old relationships especially with the Western Balkans area as a bridge between the EU and South-Eastern Europe.

Since 1989, our company Adriakombi, originally established as Yukombi, has the mission of developing and promoting CT in the whole region, together with its UIRR partners. Rolling Motorway is still our main product with the Maribor-Wels line as a successful example, but we are working hard also on developing unaccompanied traffic. Together with the Slovenian Railways, we have launched the domestic network 'Komar' which has year after year been experiencing a double digit growth. The backbone of the system is the local distribution of containers to/from the port of Koper.

Since 1998, we are promoting 'Gateway Slovenia', gradually adding new lines and services to our network. Shuttle trains linking Ljubljana to Munich (DE), Budapest (H), Verona (IT), Belgrade (S), Istanbul (TR) (and soon Bratislava (SK), Bucharest (RO) and Greece), are operated together with Kombiverkehr, Hungaria Intermodal, Cemat and Europe Intermodal. These partners then forward the shipments to the final destination. This concept received valuable support of the EU's Marco Polo programme through the SINGER and SEEIS projects.

Our company has also played a lead role in the creation of other CT companies: Crokombi in Croatia and the newly established Srbija kombi in Belgrade (RS). Their success depends on political support as much as on their initiators' enthusiasm. To properly serve the vast Turkish market, we started Europe Intermodal in Istanbul in 2007, together with Kombiverkehr.

Our entrepreneurial determination in view of a steadier development of combined traffic is hindered though by poor rail infrastructure and lack of modern rolling stock in the region, resulting in frequent and important delays.

Over the years, investments have indeed been dedicated primarily to roads where the results are more instant and easily identified by the public, whereas the modernization of the railway corridors will not start before 2010. Current projects are not solving bottlenecks on the main lines.

We deem it essential therefore that the transport policy makers reconsider their priorities. By setting appropriate laws and regulations and by activating proper financing of railway lines upgrading, they will enable the stakeholders involved in combined transport to develop their business and hence provide the market and the public at large with more of this rewarding environment-friendly transport technique, as is due to them.

USEFUL REPOSITIONING OF ROLA

I. Tomcsanyi - Director General Hungarokombi

Following the enlargement of the EU to include Romania and Bulgaria on 1st January 2007, it was only to be expected that trucks from these new Member States would stop using Rolling Motorway (RoLa) trains.

Having identified this threat upstream, Hungarokombi engaged in some effective lobbying based on a thorough market survey. This work has paid off. Having recognised that rail transport pays infrastructure fees which are far higher than those charged for road transport, the Hungarian Ministry of Transport granted almost 3.5 million euros to support the operation of RoLa transport. This intervention helped to bring about a significant reduction to the prices of these services, which are now more able to compete with road transport.

A detailed calculation allowed the judicious targeting of the total grant to be made per train and per lorry, and on that basis, demand has increased dynamically – 35,000 heavy vehicles were sent via the Szeged (H) - Wels (AT) RoLa in 2007 - with a high load factor.

At the same time, the setting up of a quality task force made up of Hungarian and Austrian experts in order to improve services is paying off. For instance, it was possible to have trains travelling on bypass tracks at times when the tracks were totally closed because of either maintenance work or the autumn strikes. There are a number of factors showing that our services are now operating on a new, stable basis.

The grant from the Ministry of Transport has indeed been renewed for 2008. Secondly, the RoMo-Net project, also involving Ökombi and the UIRR, has been accepted for the purposes of the European Commission's Marco Polo programme.

The 2.3 million euro subsidy will be used over 3 years to introduce a number of Rolling Motorway routes, covering a total of 1,600 km stretching from Bucharest (RO) to Szeged (HU), Budapest and Mosonmagyaróvár, from Sopron to Wels (AT) and all the way through to Regensburg (DE). The flexible sequencing of the trains and the offering of even better value for money than before will mean that this range of services offers an attractive alternative to road transport.

The current period of transition will last for a few more years yet, as it is expected to take this long until we have a fairer competitive situation, amongst other things as a result of higher taxes for using road transport and the continuing rise in fuel prices.

We are delighted that the Hungarian and European authorities have taken action in favour of accompanied transport, in a region where the preconditions for the development of a range of unaccompanied transport services are not yet in place.

So RoLa is still an important part of CT, which is an especially environmentally-friendly mode. In the aforementioned context, we hope to carry 70,000 heavy vehicles in 2010, i.e. 70,000 rested lorry drivers who can continue their journeys as soon the train arrives, with a much lower risk of accident.

THE YEAR 2007 IN BRIEF

UIRR AND EUROPEAN POLICY

The increase in traffic, the introduction of a strategy aiming to develop CT and the make-up of the management bodies were all discussed at the ordinary General Assembly (GA) held in Brussels on 25th June 2007.

Regarding this latter point, the two-year extension to Mr Rudy Colle's contract was confirmed and he will also be acting as secretary of Interunit during this period.

The GA was followed by the annual gala dinner at which the European Commissioner in charge of Taxation and the Customs Union, Mr László Kovács, underlined the importance of the short-term adoption of a modernised community customs code, along with the need to focus security measures on high-risk shipments.

At the GA of INTERUNIT – the association of RUs which are members of the CT Group/UIC and UIRR operators – the discussions essentially covered the quality of rail services and various aspects relating to the use of wagons. Faced with the disappointing results of the Joint Commitment on quality signed with the Railway Undertakings (RU) in 2005, the decision was taken on the basis of a proposal made by the UIRR to press ahead with setting up a task force, the purpose of which will be to implement a quality label.

The year saw numerous exchanges with the European Commission and the European Parliament about the development of CT on key topics such as liberalisation, the quality of rail services, infrastructures, the question of the weights and dimensions of road vehicles, cabotage, the insourcing of external costs, etc. The UIRR's experience and expertise on these various subjects are indeed assets which can help ensure that the most appropriate measures possible see the light of day.

The UIRR Office continued with its activities linked to European projects in the field of the safety of transport in general (COUNTERACT), and CT in particular (INSECTT). The closing conference for this latter afforded an opportunity to present a risk analysis devoted to terminals as well as recommendations on improving the safety of CT.

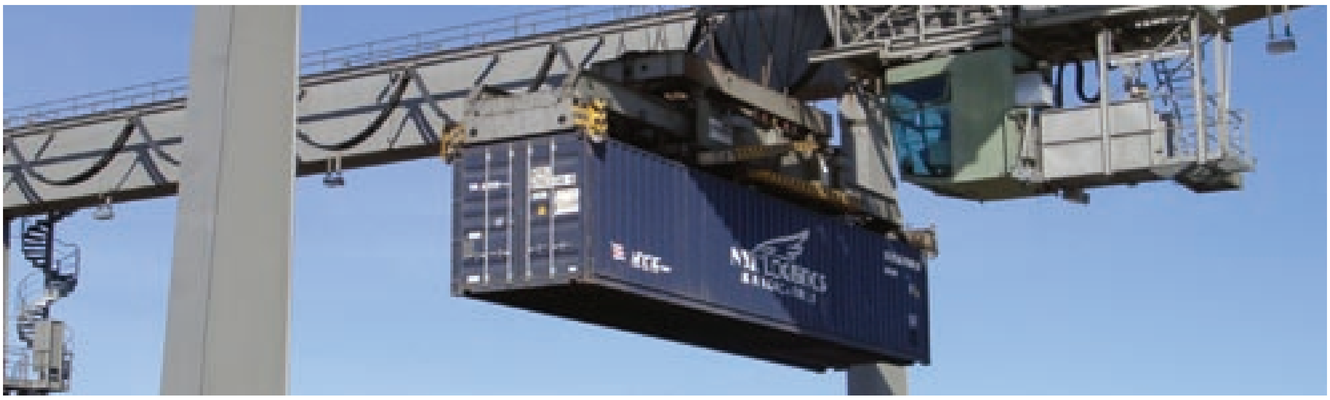
The UIRR liaison Office's participation in the first call for proposals for the Marco Polo 2 programme paid off as the Romo-Net (involving Hungarokombi, Ökombi) and SEEIS (Adria Kombi, Cemat, Kombiverkehr, Rocombi) projects were selected by the European Commission. These are part of modal shift initiatives and will aim to develop CT services, both in unaccompanied and accompanied transport.

The UIRR continued to play an active part in the work of the European Railway Agency (ERA). In February 2007, Dr János Berényi, who had already been representing the UIRR on the Board of the ERA since 2005, was appointed Vice-chairman of this authority, where he represents freight customers.

OTHER ACTIVITIES

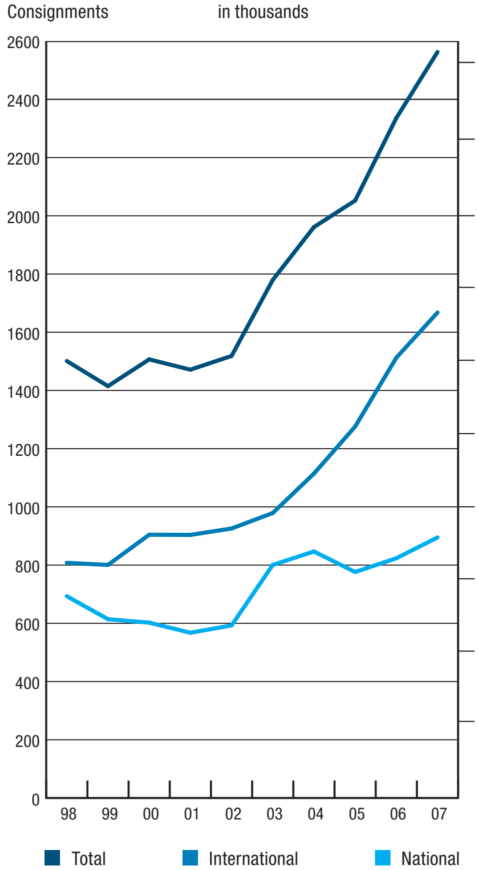
2007 saw the launch of the new UIRR website (www.uirr.com). The improvements to its structure and increased user-friendliness have led to a sharp rise in visits to it.

Following the enlargement to Eastern Europe, 8 CT operators are now partners/users of CESAR. Not less than 75% of the total traffic of UIRR member companies is already covered by Tracking & Tracing requests coming from customers.



THE YEAR 2007 IN BRIEF – TRENDS

UNACCOMPANIED CT 1998-2007



Unaccompanied Transport (Consignments)

Year	International	National	Total
1998	807.739	693.233	1.500.972
1999	800.624	614.183	1.414.807
2000	904.339	602.314	1.506.653
2001	903.708	567.642	1.471.350
2002	925.742	592.731	1.518.473
2003	978.915	800.612	1.779.527
2004	1.114.364	846.775	1.961.139
2005	1.275.927	776.318	2.052.245
2006	1.512.370	823.406	2.335.776
2007	1.667.587	895.070	2.562.657

In spite of various difficulties, in total the transport of swap bodies, containers and semi-trailers has seen appreciable development with more than 2.5 million consignments transferred from the road to the railways, in other words 10% growth compared to 2006.

Ranges of CT services from UIRR companies aim at offering better performance brought about through closer collaboration amongst themselves and are increasingly being extended by the integration of domestic networks into international networks, thus allowing international unaccompanied CT to grow noticeably, by a little over 10% corresponding to 150,000 additional consignments compared to 2006. Germany, the 'turntable' country for numerous CT flows, recorded positive results on practically all of its lines, in particular to and from Austria (+18%, i.e. 20,000 additional consignments), Italy (+6%, i.e. 35,000 additional consignments) and Poland (+44%, i.e. 35,000 extra consignments). The transportation of maritime containers to the hinterland is becoming increasingly successful for CT in Europe. As proof of this, the increase in flows from the port of Antwerp to Italy (+12%, i.e. 22,000 extra consignments) and to France (+32% - i.e. 10,000 extra consignments), from the port of Rotterdam to Austria (+60%, i.e. 6,000 additional consignments) and to Germany (+14%, i.e. 8,000 extra consignments) and from the port of Koper to Slovakia (+13,000 consignments).

As for domestic unaccompanied CT, it has increased by 9%, in other words 72,000 additional consignments. This result is all the more remarkable because all of the UIRR companies active on this market have contributed to it, mainly in Germany, France and Italy, as these countries alone account for more than 85% of this type of traffic. Here we should note the remarkable growth in Slovenia (+83%, i.e. more than 14,000 extra consignments) thanks to the direct link between the port of Koper and the terminal in Ljubljana, set up as part of the SINGER project.

ACCOMPANIED CT 1998-2007

Accompanied Transport (Consignments)

Year	International	National	Total
1998	359.606	22.122	381.728
1999	358.111	48.099	406.210
2000	385.643	74.777	460.420
2001	382.964	82.589	465.553
2002	376.512	87.922	464.434
2003	377.348	82.308	459.656
2004	312.329	69.786	382.115
2005	271.311	44.369	315.680
2006	282.064	99.911	381.975
2007	262,255	127,628	389,883

There were highly contrasting developments in accompanied CT (Rolling Motorway) in 2007.

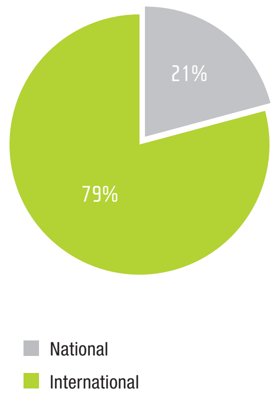
On the one hand, all of the UIRR companies offering international accompanied CT lines saw significant drops in their transport operations in 2007 (-7%, i.e. a reduction of 20,000 consignments) relating to factors including Romania and Bulgaria joining the European Union on 1.01.2007. Austrian lines to Hungary, Italy and Slovenia were affected particularly badly and the line to Romania had to be withdrawn.

On the other hand, domestic accompanied CT had a prosperous year with an increase of 28%, i.e. 27,000 additional consignments, thanks to exceptional growth once again in Austria (reaching the milestone of 110,000 consignments), a country whose government is strongly supporting the development of this type of transport.

In total, the Rolling Road still did well with results up by 2% on 2006.

THE YEAR 2007 IN BRIEF – TRENDS

TOTAL TRAFFIC



International and National traffic in Mio TKM

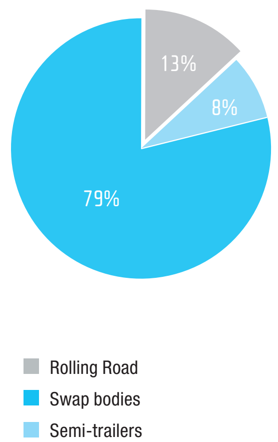
Year	International	National	Total
1998	21.926	8.308	30.234
1999	20.742	7.846	28.588
2000	24.330	8.156	32.486
2001	24.663	7.217	31.880
2002	25.027	8.047	33.074
2003	25.248	7.671	32.919
2004	26.173	8.338	34.511
2005	28.871	8.086	36.957
2006	35.558	9.836	45.394
2007	36.273	9,796	46.069

Given the fact that the drop in the number of international accompanied CT consignments (heavy consignments over short distances) was more than made up for by the clear increase in international unaccompanied CT transport operations (lighter consignments but over longer distances), the development of the traffic, expressed in tkm, was slightly positive internationally (+2%). The main reasons for this increase lie in the reinforcement of transalpine traffic and the range of new services, especially via the extension of the existing CT network towards the countries of Eastern Europe.

In spite of a sharp increase in the number of consignments, domestic traffic in tkm is slightly down, essentially due to a reduction in distance and average gross tonnage in Germany and Italy.

The average distance internationally has remained at 850 km; domestically it now stands at 410 km (reduced average distance in Germany and Italy). The average gross tonnage of a shipment is 23 tonnes internationally but also domestically thanks to the contribution made by the heavier consignments of domestic accompanied CT.

TECHNIQUES

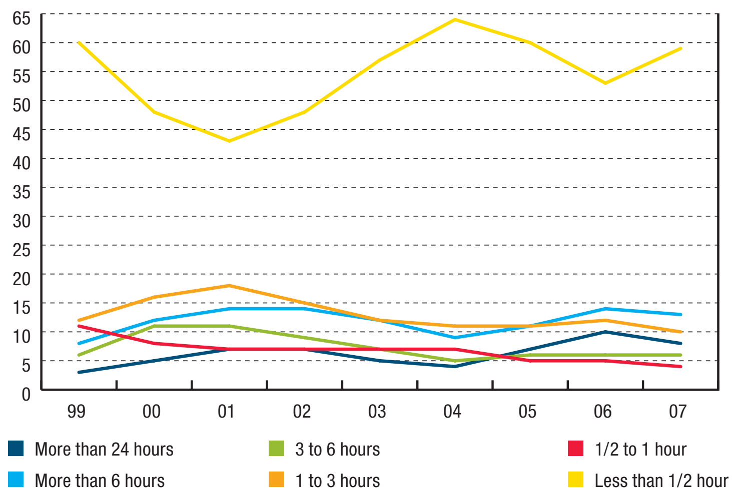


Proportion of CT techniques in total traffic in thousand consignments

Year	Swap bodies	Semi-trailers	Rolling Road	Total
1998	1.335	166	382	1.883
1999	1.260	154	406	1.821
2000	1.333	172	460	1.964
2001	1.300	171	466	1.937
2002	1.367	152	464	1.983
2003	1.405	145	460	2.010
2004	1.806	155	382	2.343
2005	1.978	164	316	2.458
2006	2.136	200	382	2.718
2007	2.342	221	390	2.953

Unaccompanied CT's share amounts to 87% of the total consignments made in 2007. The share for swap-bodies and containers amounts to 79% of the total consignments (status quo compared to 2006); approximately two thirds of these loading units are sent internationally, one third thus domestically. Internationally, there are more journeys made by swap bodies of more than 8.30 m (or containers of 30', 40' and over) than such units of less than 8.30 m (or containers of less than 20'). With 8% of the consignments, the cranable semi-trailer's share increased slightly on the main lines carrying this type of intermodal unit: Germany/Belgium/Denmark to and from Italy and Germany-Austria. The semi-trailer is used particularly in transport chains including short maritime transport, because it can easily be transhipped onto a ferry (using the RoRo system). Here we should underline the expected importance of technological breakthroughs in order to attract conventional semi-trailers (which are not cranable) to combined transport. In accompanied CT, the number of domestic shipments has increased sharply but fallen internationally. Notwithstanding a global increase of this technique in absolute terms, its share went slightly down.

PUNCTUALITY



2007 was another difficult year, especially during the second six months, following prolonged rail strikes which were more severe in France than in Germany.

Out of 23 300 international trains monitored in 2007, only 59% were on time (with a tolerance of 30 minutes), 27% were more than 3 hours late and 8% were more than 24 hours late which, using the same bases, is a slight improvement compared to 2006 on practically all of the lines which were monitored.

This means that goods which are sensitive in terms of journey duration/punctuality cannot be sent by Road-Rail CT. In order to remedy this situation, the INTERUNIT Liaison Committee, made up of heads of railway undertakings, members of the CT.G of the UIC, and CT operators who are members of the UIRR, has decided to launch a project involving the labelling of CT trains over a few selected routes, covering the whole of the CT chain (from the site of departure to the site of arrival and excluding pre and post-positioning legs). This project has been submitted for the first call for tenders in the framework of the European MARCO POLO II programme.

THE YEAR 2007 IN BRIEF

OPERATIONAL ORGANISATION OF MEMBER COMPANIES

Kombiverkehr achieved its best result in terms of shipments since it was set up, thus helping to protect the environment by cutting down on 980,000 tonnes of CO^2. This was achieved firstly by launching new direct trains and increasing the capacities of certain routes which were already heavily used and secondly by strengthening relationships with customers. Thanks to the commitment of the Operations Division of the DB, the effects of the loc drivers' strike were kept relatively well under control.

95% of the services supplied by Hupac used the continuous traction commercial model. There was an increase in the quality obtained and indeed the punctuality rate rose from 71% to 75%. The target for 2008 is to reach 80%, at the same time accentuating the 12.6% growth in consignments recorded in 2007. In order to achieve the modal transfer targets pending the entry into service of the Gothard base tunnel, the Swiss operator – which saw sharp growth in its traffic to and from the ports of Rotterdam (NL), Antwerp (B) and Zeebrugge (B) in 2007 – is calling for subsidies for combined traffic worth a total of 2 billion CHF for the period from 2011-2018.

At its extraordinary GA held on 19th December, the decision was taken to increase the capital of Novatrans from 3.6 to 10.8 million euros. The French operator also redeployed its transport plan in 2007 and is continuing with its recovery.

Ökombi moved into its parent company RCA's new premises, allowing it to improve the communication between these two organisations still further and to shorten the decision-making circuit for greater efficiency to benefit customers. Like RAlpin, the Austrian operator opted for a new logo designed to reflect its dynamic ideas and ambitions.

Intercontainer Austria (ICA) acquired the Welz Containeroperating division of Quehenberger Logistik in order to boost the synergies between these two units. ICA is thus illustrating its strategic aim of developing its business activities in the Salzburg region.

As for Eurotunnel the company introduced a new pricing strategy designed to foster free access, and in November it started the operational activities of its subsidiary, Europorte 2, whose remit includes the traction of SNCF trains between Frethun (Pas-de-Calais) and Dollands Moor (Kent).

THE YEAR 2007 IN BRIEF

TRW in turn increasingly opted for direct shuttles instead of the Cortax system (international trains from Belgium stopping off at the Ronet hub) and is banking on a more solid mix of continental and maritime containers, in order to achieve the target of doubling traffic by 2010.

Working with **Kombiverkehr** and the German and Russian railways (DB and RZD), **Polzug Intermodal** played a part in setting up a Joint Venture aiming to develop logistical services for containerised transport between Western Europe and Russia. This operator is also involved in a project aiming to start a train schedule running to and from China.

As part of the discussions on the Swiss legislation on goods transport, **RAlpin** hopes that rolling road (RoLa) capacities will reach 250,000 lorries carried in 2015, including approximately 200,000 for the Lötschberg to Simplon route. **Naviland Cargo** made a profit during the financial year, which strengthens its strategy of focussing its activities on the transportation of maritime containers.

DEVELOPMENT OF CT SERVICES

NEW LINES

TRW increased the frequency of some of its lines, including the Charleroi (B)/Novara (I) service, for which three shuttles are now providing a weekly round trip. During the 2nd six months, **Novatrans** launched a train from Moerdijk (NL) to Barcelona (Granollers terminal, ES) to Tarragona (Constanti, ES), in partnership with **Combiberia** and **Kombiverkehr**, and also a service from Basel (CH) to Perpignan (F), in partnership with **Hupac**. The Swiss operator also launched a line from Antwerp (B) to Perpignan (F). In order to achieve the two-figure growth hoped for in 2008, it would like to strengthen its transalpine traffic and open up links across the Benelux-Poland-Russia and Benelux-South-Eastern Europe corridors.

After obtaining a rail transport licence, **Kombiverkehr** was able to provide the traction for one of its services, in this case the route from Rotterdam (NL) to Duisburg (DE). The results obtained so far are edifying, indeed the punctuality rate has risen from 40% to 90%. In order to connect Turkey to the main European economic centres, the German company launched the "Bosphorus-Europe Express" service in partnership with **Adria Kombi**, using Ljubljana as turntable.

THE YEAR 2007 IN BRIEF

Crokombi, which recorded a doubling of its transport operations between Croatia and Hungary in 2007, hopes to open a new Rolling Road service between Spačva (HR) and Wels (AT), in partnership with **Ökombi**; the latter saw sharp growth in its traffic via the Brenner tunnel, which now accounts for 54% of its total traffic. At the request of the Ministry of Transport of Lower Saxony, there is talk of setting up a RoLa between Berlin and the Ruhr basin in order to relieve congestion on A2 motorway from Hanover to Berlin.

150 full trains are now placed into circulation every week by **ICA**, which plans to make its network denser still.

Rocombi's main lines of transport connect the port of Constanta (RO) to the main factories in Romania, a country whose size and economic potential offer interesting CT prospects.

Due to high costs of traction, **Cemat** had to close down a few national lines but at the same time, it launched together with its partners new international services on the axes between Italy and respectively Belgium, Luxembourg, the Netherlands and Germany.

TERMINALS

The modernisation of the terminal in Lovosice (CZ) has contributed to doubling shipments by the "Bohemia Express" service offered by **Bohemiakombi** and **Kombiverkehr**. The results of a survey of its customers led **Kombiverkehr** to call for longer terminal opening hours in order to achieve greater flexibility. The managers of the German terminals at Duisburg-Ruhrort, Hamburg-Billwerder, Cologne-Eifeltor and Ludwigshafen have already acceded to

this request. As a result of the opening of the new Grans-Miramas terminal (F, on the Clesud platform), **Novatrans** launched a train connecting it to Paris (F).

Having recorded strong growth in its traffic to and from Belgian and Dutch ports, **Hupac** will be investing in building a trimodal terminal in Antwerp. It will probably be available in late 2009. The extension work on the Busto-Arsizio terminal is also underway. In order to cope with the increase in volumes expected by **Polzug Intermodal**, investments are being scheduled to extend the capacities of its Polish terminals in Wroclaw, Slawkow, Gadki and Pruszkow.

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