

A difficult year behind, a challenging one ahead



European road-rail Combined Transport ended a year of overall decline in 2012, and is facing severe challenges in the one starting. A second wave of slower economic activities in the European Union – related to the ongoing crisis – resulted in weaker demand, while a major reconstruction on the important Trans-Alpine route over the Brenner Pass, an accident caused closure of the Gotthard line, and several lesser track-maintenance-related disturbances exacerbated the overall performance.

On the other hand, a stabilisation of consignments while no repeat of the maintenance-related losses of capacity is reflected in the UIRR CT Sentiment Index for this year, which suggests that European road-rail Combined Transport may cautiously expect a modest rebound in 2013.

Continued reform of the regulatory framework of European transport, and the railway sector at its heart remained in high gear towards the end of 2012 as the recast of the First Railway Package (The Single European Rail Area Directive 2012/34/EC) was published on the EU's Official Journal in December. Deadlines for innovative implementation tasks addressed in the Directive to the European Commission are now live. The first drafts of legislation that is to form the Fourth Railway Package have begun leaking around the same time. Legislation on new road vehicle type approval rules, as well as weights and dimensions are anticipated in the first months of 2013, while news of another round of revision of the Eurovignette Directive, with encouraging contents, also arrived

UIRR's General Assembly in December adopted the position paper titled Combined Transport Roadmap 2050, which was presented to the European Commission on 22 January and is presently available for download from UIRR's website. This roadmap comprises the measures deemed necessary by UIRR members to overcome the negative consequences of the ongoing economic crisis, ensure an environment that enables continuous productivity growth and fair competition, as well as the achievement of the modal shift aims contained in the 2011 EU Transport White Paper that is to place European freight transport on an economically and ecologically sustainable path.

UIRR has started the year with a modernised logo and new colours that symbolise the readiness of the association to change, primarily through emphasising the articulation of transshipment terminal interests, but also to continue unabated the advocacy of the benefits of having more Combined Transport for Europe. Efficiently inserting electric rail into long distance European transport-chains will continue to be the most productive means to reduce the energy-use and harmful emissions, as well as improving the safety of freight transport for the entire continent.

Martin Burkhardt - Director General

515 days

remain to mark every European loading unit with the ILU-Code



identification of Intermodal Loading Units in Europe

Obtain your owner-key today: www.ilu-code.eu



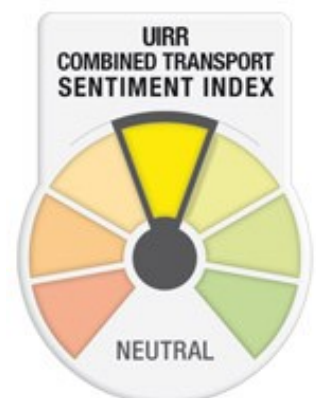
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CONTENTS

UIRR's CT Roadmap 2050.....	2
Comparison of CT techniques.....	2
Single European Railway Area.....	3
Railway market Monitoring Scheme...	3
Wagon noise update.....	4
AGTC revision under way.....	4
ILU-Code sticker service launched.....	4
TAF-TSI revision update.....	5
UIC CT-Leaflet revision update.....	5
New CESAR user interface launched...	5
Stockholm-Verona Corridor.....	6
Bremen-Belarus-border Corridor.....	6
Spain continues to invest in rail.....	6
DESTINY Project update.....	7
HUBWAYS Project update.....	7
OECD / ITF statistics.....	7
Recent Appointments.....	8
Members' News.....	8
Key Dates & Events.....	8

**Business outlook for
the 12 months between
1 January – 31 December 2013**



UIRR's Combined Transport Roadmap 2050

January 2013

UIRR welcomed¹ the European Commission's 2011 Transport White Paper (2011 TWP), as it properly identified the most critical aspects that led European freight transport onto the unsustainable path it threads on today that is characterised by:

- Wasteful use of energy resources (exacerbated by congestion),
- Excessive reliance on fossil fuels,
- Very high greenhouse gas² (GHG) emissions (resulting in accelerated climate change),
- Poor safety record of road transport (resulting in millions of road accidents, causing tens of thousands of deaths and hundreds of thousands of serious personal injuries coupled with material losses estimated in the billion euro range), and
- Unacceptable disturbance to living conditions in the form of noise and air pollution, as well as landscape and biodiversity destruction (commonly expressed as externalities).

Alongside several other measures, the 2011 TWP defines an obvious means to correcting the above detailed deficiencies of inland freight transport: **the shifting of 30% of longer distance (300km or more) road tonne-kilometres by 2030 and 50% by 2050 to more sustainable modes, primarily electric rail.**

Evaluation of various CT techniques

28 November 2012

In preparation for the UIRR CT Roadmap 2050 paper, UIRR commissioned a study from KombiConsult GmbH to examine the economic viability of different CT techniques in order to determine which is best suited for support under the different circumstances. The various alternatives were evaluated on the example of transporting semi-trailers through Switzerland.

Three transshipment techniques, CargoBeamer and two variations of Modalohr, were chosen for examination in the study, and a comparison of their respective system-level total costs to the "conventional" method – based on vertical transshipment of semi-trailers – known as Unaccompanied Combined Transport (UCT) was carried out. **The study found UCT to have by far the most favourable performance when measured in overall system costs.**

The proposed measures comprising the UIRR roadmap were grouped into four:

- (i) Enhancing the quality of rail freight services
- (ii) Extension of infrastructure capacities
- (iii) A level intermodal playing-field
- (iv) Catalysing the continued dynamic development of CT

Download the roadmap from here: <http://uirr.com/en/media-centre/press-releases-and-position-papers/2013/mediacentre/564-uirr-ct-roadmap-2050.html>



From left to right : Dr Mathias Ruete, Director-General of DG MOVE receiving the paper presented by UIRR Chairman, Mr Robert Brehahn.

Moreover, UCT emerged superior in every cost category examined. The two Modalohr systems produced 30% higher overall system costs, while CargoBeamer turned out 40% more expensive.

Before making a recommendation to decision-makers responsible for delivering the modal-shift aims contained in the European Commission's 2011 Transport White Paper, as well as the 2018 target for modal shift in Switzerland, UIRR intended to present scientific evidence to support the most efficient allocation of resources by market players, consignors and the transport sector, as well as governments and political decision-makers. And the findings point in one direction: towards "conventional" UCT. Click: <http://uirr.com/en/media-centre/press-releases-and-position-papers/2012/mediacentre/558-evaluation-of-competing-ct-techniques.html>

¹ <http://uirr.com/en/media-centre/press-releases-and-position-papers/2011/mediacentre/416-welcoming-the-transport-white-paper.html>

² Carbon dioxide (CO₂), nitrous oxides (NO_x) and ozone (O₃)

The Single European Rail Area Directive

14 December 2012



The Recast of the EU's First Railway Package has been completed on 14 December 2012, when the Single European Railway Area Directive (2012/34/EC) was published in the European Union's Official Journal. The new legislation entered into force on the same day. It repeals the three directives comprising the original First Railway Package: 91/440/EC, 95/18/EC and 2001/14/EC. Member States shall implement every necessary adjustment to their legislative frameworks in time to allow compliance of railway undertakings, operators, applicants, authorities and other entities concerned by 16 June 2015. The new legislation may be downloaded from here: <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2012:343:0032:0077:EN:PDF>

UIRR welcomes the new legislation, which it hopes will further contribute to the overall de-politicisation of the European rail sector, allowing more competition and more interoperability at the same time. Especially important in this regard is the new type of transparency that the Directive introduces through the biannual reporting obligation of the European Commission on the development of the European railway market. This provision should build on the work commenced under the Rail Market Monitoring Scheme (*for more details please see the article below*).

Uniquely to EU Directives, the current legislation places the requirement on the European Commission to draft so-called "implementation guidelines" on a series of issues, while other operational tasks are also defined to aid the functioning and development of a truly single market for railway services.

UIRR believes strongly that the review of historic bilateral agreements between Member States, and the Commission's ongoing presence when amending these, or concluding new ones, will considerably contribute to reducing the productivity losses suffered by border-crossing freight traffic between many Member States (even those that belong to the Schengen zone).

Implementation guidelines relevant to European Combined Transport will have to be issued on the conditions for accessing the railway infrastructure, the mode of calculation of the direct cost of operating a train (relevant for setting the track access charges), and details for requirements with regard to authorised applicants for train paths (that may include CT Operators as well). European CT Operators excitedly await the emergence of genuine one-stop-shops for cross-border train paths with the sincere hope that these will also ensure smooth passage between different networks.

UIRR asks for the responsible consideration of every circumstance when drafting the guidelines on ETCS and noise-related track access surcharges. UIRR also maintains its serious reservations with the concept of market segmentation and mark-ups (also applicable to track access charges) as this concept may result in discriminatory practices against some actors, or sectors.

Reinforced national regulatory bodies, the more clearly articulated essential functions of rail infrastructure managers and the rules that guaranty the independence of their management shall all contribute to the competitiveness of rail.

Railway Market Monitoring Scheme Meeting - 2012

3 October 2012



UIRR has been a regular participant since the inception of the RMMS meetings over ten years ago. This year the RMMS meeting took place about four months later than usual, only in October.

The Commission presented its Third Report on Monitoring the Development of the Rail market (COM 2012/459) which can be downloaded from here: <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2012:0459:FIN:EN:PDF>

While praising the Commission's efforts to conduct the RMMS exercise and to compile the report, UIRR has expressed its disappointment with the contents especially when coming to the detailed breakdown of statistics compiled by EUROSTAT, the inconsistency of Member State cooperation to provide the necessary data and the lack of several key indicators. Click: <http://uirr.com/en/media-centre/speeches-and-articles/2012/mediacentre/552-uirr-at-rmms-a-ersek.html>

UIRR's main recommendations were:

- The degree of market openness can only be fairly judged if the ratio of locomotives controlled by the incumbent railway undertaking is known.
- Besides the quantitative performance indicators, quality performance data should also be systematically collected and reported.
- EUROSTAT should refine road haulage data collection according to the distance travelled, so as to be able to evaluate the market position of rail freight.
- Rail freight should be segmented into domestic, border-crossing (export/import) and transit categories.
- The network should be differentiated according to passenger only, freight only and mixed use categories.
- The developments in loading gauge and maximum allowed train length should also be monitored with regards to the network.

Wagon noise update

December 2012

The issue of wagon noise is becoming ever more important as noise differentiated track access charges (NDTAC) have been introduced already in Switzerland, The Netherlands and in Germany. The possibility for the appearance of traffic bans at least in night hours will likely follow in some years' time for "noisy" wagons within some countries or areas.

The retrofitting of old wagons with LL-blocks appears today as the only economic solution to reducing noise levels. After two years of the UIC Europetrain project, under which test runs were conducted by a train throughout Europe, the first results are now available.



It should be noted that the in-service tests show that the wheel wear is increased depending on the LL-block product used. Revisions to the composition and positioning of LL-blocks may be carried out after the analysis of the measurement data. Hopes are high that the homologation of some types of LL-brake shoes can be obtained in mid-2013, and the retrofitting of noisy older wagons can begin in 2014.

Of the countries that introduced NDTAC, only Switzerland has offered to finance the full cost of retrofitting the older domestic wagon fleet (Germany provides state assistance only covering 50% of the retrofit expenses).

AGTC revision under way

6 November 2012

The "European Agreement on Important international combined transport lines and related installations (AGTC)" that is now signed by 15 EU Member States is overseen by UN ECE. The agreement describes a number of minimum parameters for upgraded and new railway lines with emphasis on train length, axle loads and the combined transport (loading gauge) profile. The working group has now started the discussion how far an alignment for the larger European area should go with the TSI infrastructure of the EU member states.

Martin Burkhardt, Director General of UIRR reported on the current developments of Combined Transport and the concerns on the Commission proposals for changing the weights and dimensions of road vehicles that risk to lead to a modal back-shift from rail to road, and to have negative effects on road safety. Moreover, if increased dimensions would be allowed on road it would result in a devaluation of investments in CT wagons.



Special subject this year was information technology systems (ITS); in this context the CESAR system was mentioned that is a common customer interface for tracking and tracing.

The representative of the French Government announced at the meeting that from 1 October 2013, transport companies will have to provide information on the carbon dioxide emitted during their operations. They also have to provide information about the well-to-wheel quantity of CO₂. The system will easily underpin that transport-chains which include electric rail offer by far a better environmental performance.

UN-ECE is maintaining an interesting database on national Policy measures to promote intermodal transport that is available on the UN-ECE website: <http://apps.unece.org/NatPolWP24/>

ILU-Code sticker service launched

December 2012

Once the owners of intermodal loading units obtained an ILU-Code owner key, they have to mark their loading units. In order to ease the marking of ILUs, UIRR has launched a new service for the purchase of ILU-code stickers. Registered ILU-Code-holders can from now on order their stickers through the ILU-Code website.

A different type of label can be chosen according to the type of loading units, namely Macmark for rigid surfaces, and Averysign for flexible surfaces (like tarpaulins).

Click: <http://www.ilu-code.eu/en/ilu-code-stickers>



Dimensions: 86 x 10.5 cm

Black lettering / MACmark® MACsoft 900



White lettering / MACmark® MACsoft 900



Black lettering / Avery® SignFlex 2200



White lettering / Avery® SignFlex 2200



TAF TSI revision working-group update

December 2012

Revision of the TSI on Telematic Applications for Freight (TAF TSI), shall focus on the extension of the scope taking into account the current Strategic European Deployment Plan (SEDP) plan, on the coherence between the TAF TSI and the TSI on the Telematic Applications for Passenger services (TAP) and on the definition of the functionalities and messages needed by the freight customers.

As major users of rail freight services, UIRR, in close cooperation with ESC (European Shippers' Council) is fully engaged in the revision process by defining their essential requirements.

TAF TSI should in particular provide the adequate technical scope (definition of the term 'user' and 'customer'), the electronic exchange of the electronic consignment note, the train path request process and the related messages for tracking and tracing issues (e.g. estimated time of arrival – ETA).

The entire change philosophy of UIRR and ESC is to receive data directly from the source; that is to say for example that all infrastructure related data – like traffic information – should be sent directly by the infrastructure managers to every user group simultaneously (railway undertakings, CT operators and shippers).



UIC Leaflet revision working-group update

December 2012

UIC, in collaboration with the UIRR, started in 2011 a complete revision of the leaflets related to Combined Transport. These leaflets, in total 10, are related to wagons (unaccompanied and RoMo), loading units (containers, swap-bodies and semi-trailers), lines (railway gauge), and terminal equipments.

Under the chairmanship of SNCF, the revision group (ÖBB, DB, SNCF, Trenitalia, Infrabel and SBB) had his last meeting in December 2012.

Every leaflet draft has now been sent to the UIC for editorial finalisation and will be very shortly (at the latest in February) submitted for comments to the UIC members and interested third parties, such as CT operators, manufacturers (wagons and loading units) and terminal managers. During this revision process, the constant concern of the UIRR was to adapt all these leaflets according to existing EN standards and to integrate new elements only if these really contributed to facilitate a smooth running of CT trains.



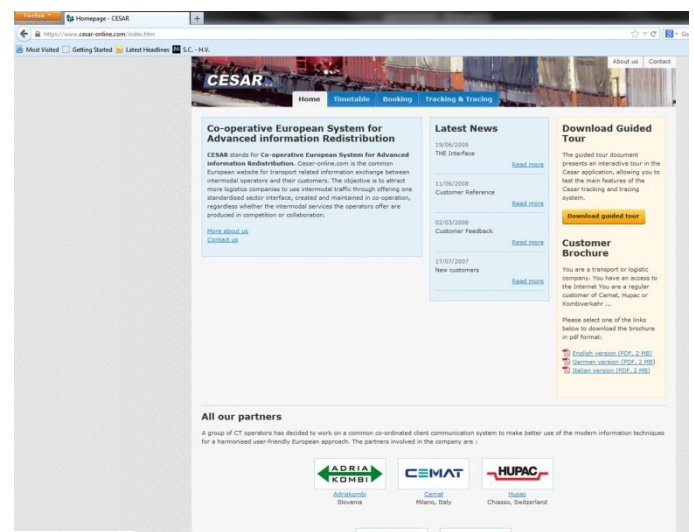
New CESAR user interface launched

December 2012

The CESAR application (Co-operative European System for Advanced information Redistribution) is the common European website for transport-related information exchange between intermodal operators and their customers. The objective is to propose a single online standardised interface to the logistics companies regardless the operators they might use.

CESAR operators have recently launched a new interface, which – besides a graphic improvement – provides a more comprehensive and flexible user interface: improved and new functionalities like customisable pages, advanced research, filtering and export options.

During a transition period and to ensure a smooth migration to the new system, both user interfaces (the old one and the new one) will be available. From April 2013, only the new Cesar Web Site layout will be active. See: www.cesar-online.com.



Stockholm-Verona Corridor

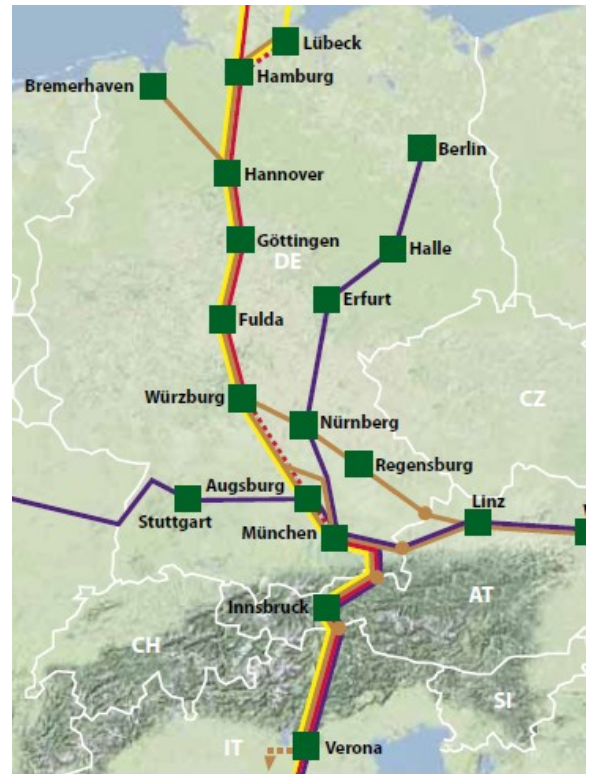
RNE Corridor 4

The main North-South axis of Europe which is routed to cross the Alps through the Brenner pass in Austria.

Traffic along this axis was heavily disturbed in 2012 during the several week-long reconstruction of the line crossing the Brenner Pass by ÖBB Infrastruktur. This has meant the loss of critical infrastructure capacity disallowing the affected CT Operators to carry the usual quantities.

Presently, as the rebuilding was completed this P400 loading gauge Brenner section, traffic is running uninterrupted.

UIRR members Cemat, Bohemiankombi, Hupac, IFB, Kombiverkehr, Ökombi all operate along this corridor.



Northwestern Ports-Berlin-Belarus border Corridor

RNE Corridor 3

Major East-West route running in the northern half of the Continent. Most of the new Europe-Moscow-China transcontinental services use this route.

UIRR members Hupac, IFB, Kombiverkehr, Polzug operate along this corridor.



Spain commits to continued investment into rail

October 2012

Even in tough times, the Spanish government is committed to expanding rail networks and retaining their reputation as leading investors in this sustainable mode in Europe.

Following the October 2012 announcement of a €4.7bn investment in rail for 2013, details have now been released for the Mediterranean Corridor project to create a 1435 mm (or standard) gauge freight route over the 1300 km between Figueres and Algeciras.

This line will establish an electrified double track link between Spain's largest deep-sea port with Catalonia and ultimately Southern France, and will be accessible by standard European rolling stock.



DESTINY Project update

December 2012

DESTINY, which stands for DEployment of STandards for INtermodal efficiency, is a co-funded project under the umbrella of the MarcoPolo programme of the European Commission, aims to provide a common learning action to improve efficiency of European intermodal transport-chains through the deployment of best practices in the implementation of existing standards related to the identification, marking and codification of ILUs (EN 13044), load securing and handling dangerous goods.

UIRR, in collaboration with several partners, is conducting a European wide awareness raising actions to make the intermodal actors attentive on the necessity to fully implement the EN13044



standard. Among the actions undertaken, the DESTINY partners have elaborated an information leaflet targeting logistics companies. This info brochure, available in English, French and German, provides owners of loading units with information on how to reserve an ILU-Code and to comply with the new marking procedures.

This leaflet and other information can be found on the project's website: www.destiny-project.eu. Three specific interactive blogs have also been opened here for exchanging experiences on codification/markings, load securing and dangerous goods issues; see: <http://www.destiny-project.eu/blogs>.

HUBWAYS Project update

December 2012

The FP7 Project HUBWAYS will provide a comprehensive model for cooperation and communication between green hubs' stakeholders and design and demonstrate value added services making co-modal networks attractive to use and, at the same time, contributors to reduce greenhouse gas emissions and other pollutants on the hubs but also for the entire chain.

The main outputs of the project will be: (i) a model for Green Hubs enabling low-carbon, resource-efficient and secure transportation services, (ii) a system to electronically connect multimodal terminal network stakeholders and amplifying their joint capabilities when using the mode, and (iii) Common Value Added

Services to be combined with existing services, facilitating end-to-end co-modal, low-CO₂ transport solutions that maximize utilisation of terminal and logistics resources. Four HUBWAYS Demonstrators (Adria Kombi, IFB, Interporto Bologna and Jernhusen) will be used to validate the solutions.

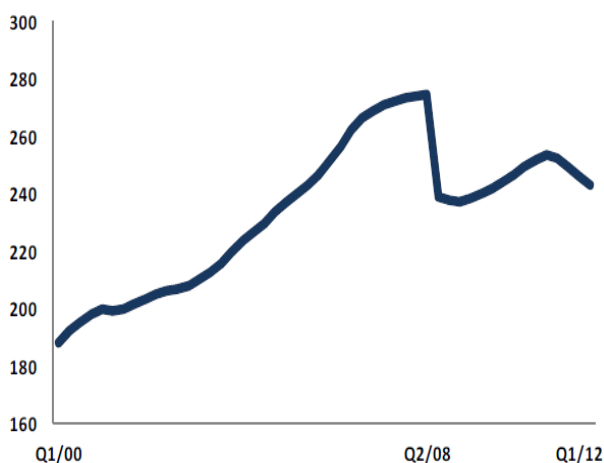
UIRR, representing the interests of the intermodal operators and transshipment terminals, is involved in all the work packages to ensure that the industry requirements are taken into account (responsible among other for the industry consultations and user requirements). For more information click: www.hubways.eu

OECD / ITF Statistics

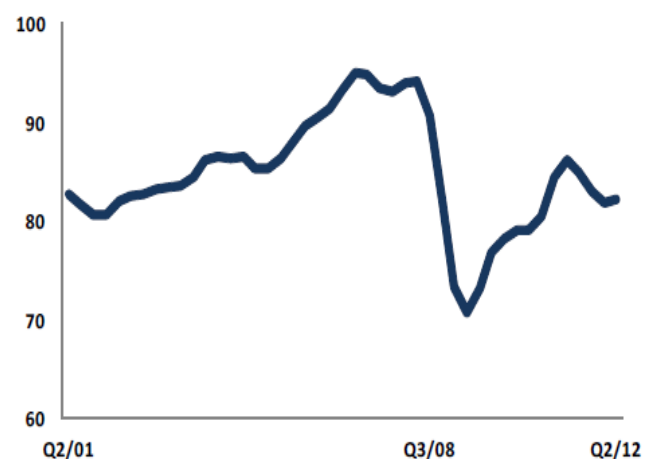
December 2012



Road freight in the European Union (Bn tkm)



Rail freight in the European Union (Bn tkm)



Recent Appointments

INTERFERRYBOATS

October 2012



Mr Johan Gemels was appointed the CEO of Belgian UIRR member Interferryboats (IFB). Mr. Gemels works for IFB since 1998 in the capacity of General Manager for Terminals. He holds degrees in railways, engineering and management.

ERA

November 2012



Mr Martin Burkhardt, the Director General of UIRR was appointed to the Administrative Board of the European Railway Agency for a three-year period as the representative of rail freight clients.

UIC

December 2012



Mr Wladimir Jakunin, the President of RZD, Russian State Railways, was elected Chairman of UIC, the International Union of Railways, during its General assembly in Brazil for a two-year period of 2013-2014.

At the same time, Mr Mauro Moretti, CEO of FS, Italian State Railways and also Chairman of CER, was elected Vice Chairman, while the mandate of UIC Director-General Jean-Pierre Loubinoux was extended for the same duration.

Members' News

BOHEMIAKOMBI

CEMAT

KOMBIVERKEHR

7 November 2012

New service between Prague and Verona covering 1093 km-s in under 24 hours (with an average speed close to 50km/h) is a success as nearly 5000 truckloads were transported using it during 2012.

Click: <http://www.bohemiakombi.cz/files/1359040377-100-vlak-ostrava-verona.pdf>

Key Dates & Events

6-8 February, Amsterdam	Ports, Terminals & Intermodal Transport Conference
26 February, Brussels	2013 European Railway Awards
19 February, Brussels	E-Freight Stakeholder Workshop
6 March, Brussels	FERRMED Conference on Long and Heavy Trains
26-28 March, Paris	SITL Exhibition
4-7 April, Heming, Denmark	Transport Scandinavia 2013 Exhibition
16-17 April, Germany	INTERUNIT Technical Committee Meeting
23-25 April, Birmingham	Multimodal 2013 Exhibition
12-14 May, Antwerp	Bulkports, Terminals and Logistics Exhibition
15-16 May, Paris	UIRR and Interunit General Assembly
22-24 May, Leipzig	International Transport Forum Summit 2013
8-10 October, Hamburg	Intermodal Europe 2013
9-11 October, Antwerp	GreenPort Conference



**INTERNATIONAL UNION
FOR ROAD-RAIL
COMBINED TRANSPORT**

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