



Concluding a rollercoaster year

2016 has been a rollercoaster year: one quarter up, the next down, and again. Accordingly, the UIRR Quarterly CT Performance Indicator was up after showing a negative result in the previous quarter. On the back of a steadily increasing oil price – up from \$29 to \$54 over the course of 2016 – and the resulting freight rate changes, as well as the modest economic growth that is returning to Europe, the expectations of the intermodal sector rebounded from 'slightly negative' to 'slightly positive', as indicated by the UIRR CT Sentiment Index for 2017.

The advent of a New Year brings about a new Council Presidency: as of 1 January Malta takes the baton of leading the European Council from Slovakia. The outgoing Slovakian Presidency must be praised for its efforts to bring the Fourth Railway Package and the amendment concerning the regulation on rail transport statistics to success. Both of these legislative initiatives will contribute to reinforce the competitiveness of the rail sector – essential to the further enhancement of European Combined Transport.

2016 has closed on a positive note when it comes to bringing more transparency to the rail and intermodal sectors. The 5th RMMS Report was issued by the Commission and Eurostat began reporting on intermodal by publishing data on unitisation and modal shift. Intermodal transport should play a greater role when it comes to fighting climate change – our system of long(er) distance freight transport is optimal to insert sustainable modes into pure road transport chains. This was recognised by Italy and Belgium, both of which have announced compensation plans for CT.

Whilst considerable attention has been turned towards rail freight during the first week of December, when a number of events took place examining the challenges and outlook, it was for a good reason: rail freight is not developing the way foreseen in the EU Transport White Paper and as it would be needed to fulfil the carbon footprint reduction targets of transport. The sector understands what is expected of it, however politicians – primarily in the Member States – must also be brought on board if meaningful progress is to be achieved.

According to the latest data available, intermodal transport represents about 40% of rail freight (when expressed in tonne-kilometres) and about 60% of border-crossing rail freight. Consequently, Combined Transport Operators are prime stakeholders of Rail Freight Corridors interested in the Europe-wide competitiveness of rail freight. This is why UIRR has taken a role in the fulfilment of the RFC Sector Statement aims, including the ELETA Project, which aims at developing a solution for reliable ETA projection. UIRR Terminals are demonstrator partners to the TiS for Terminal's expansion project of RNE, which aims to include the last mile to/from 'under-the-crane' at terminals.

Ralf-Charley Schultze - President



Visit the IBS - UIRR stand
Hall B.6 - Stand 300

Messe München
9 - 12 May, 2017

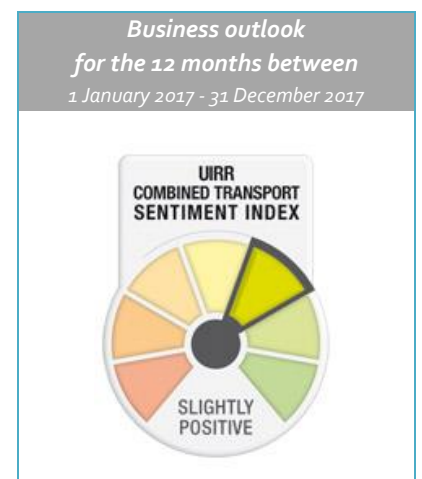
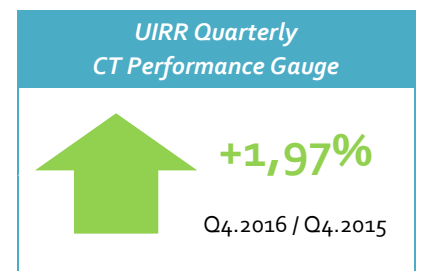


International Transport and Logistics Expo

14-16 March 2017

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Changing of the rotating Council Presidency

1 January 2017

The last member of the Dutch-Slovakia-Malta trio of European Council presidencies has taken over the responsibility of running the various EU Council bodies on 1 January 2017.

Outgoing Slovakia oversaw the final voting on the various components of the Fourth Railway Package, consensus on the last parts of which was reached under Dutch coordination. In parallel, the consensus was reached on the revision of the Railway Statistics Regulation, which should contribute to obtaining a better insight on how well is the European railway sector performing.

Statistics: rail and intermodal

27 October 2016

The amendment of Regulation 91/2003 concerning railway statistics has finally been adopted by the EU legislators in December 2016. The sector still awaits the publication of the new legal text, which is anticipated to take place in the EU's Official Journal in the coming weeks. The revised Regulation is expected to contribute to the quality of statistics on railways.

The 5th Railway Market Monitoring Report of the EU Commission has been adopted on 8 December 2016 (http://ec.europa.eu/transport/modes/rail/market/market_monitoring_en). The Report contains data until 2014. Accordingly, infrastructure spending in the EU increased from €29 billion in 2011 to €45 billion in 2014. Nevertheless, the overall quality performance and market share of rail freight remains stagnant.

The picture of rail freight competition was found to have advanced, which is measured as the percentage of the market belonging to non-incumbent operators. However, the ownership of competing "newcomers" is increasingly being concentrated in the hands of incumbents of other Member States.

EU Transport Scoreboard 2016

27 October 2016

The EU Commission has published its EU Transport Scoreboard for the third time: http://europa.eu/rapid/press-release_MEMO-16-3532_en.htm. The leaders remain unchanged: The Netherlands first, Sweden second and Austria tied with Germany for third place.

Rail Freight in the Focus

December 2016

The week of 5 December belonged to the topic of rail freight. On Monday the UIRR-CER-ERFA co-produced Rail Forum Europe event examined the outlook and challenges mentioning Member State best practice from the United Kingdom (MoT Report on the promotion of rail freight and Network Rail's freight specific development plan). Issues of track access charging, imbalanced regulatory framework and digitalisation were also mentioned.



The Maltese Presidency's transport focus will be on the Maritime Sector, which is understandable considering that Malta is one of only two EU member states that does not have a rail network.

The upcoming trio of presidencies to take charge from the second half of 2017 – made up of Estonia, Bulgaria and Austria – will be confronted with the dossiers related to the much anticipated Commission Road Initiatives (concerning tolling, social conditions, vehicle approval, emission and energy efficiency testing, etc.), as well as the revision of the Combined Transport Directive (92/106).



Moreover, in six Member States the entire market remains in the hands of the incumbent rail freight operator. The Report notes that "the performance of rail freight transport in the EU remains unsatisfactory".

Eurostat recently launched statistics reporting on containerisation (unitisation) in freight transport: http://ec.europa.eu/eurostat/statistics-explained/index.php/Freight_transport_in_containers_-_statistics_on_unitisation. Indicators monitored are unitisation in the different modes, as well as broken down by mode of transport (road, rail, IWW, deep sea) as expressed in tonne-kilometres. Furthermore, indicators are produced to show the *modal shift potential of long-distance freight in containers* in both tonne and tonne-kilometre terms. The rail unitisation indicator includes containers, swap bodies, unaccompanied semi-trailers and accompanied trucks. UIRR strongly supports this initiative and looks forward to more and more Member States beginning to generate this type of data.

---There are annual grants offered by Eurostat to Member States to develop their intermodal monitoring capabilities.



A disappointing detail that none of the Member States who achieved progress on the ranking did so due to advances in rail freight. Bulgaria and Romania are praised for the degree of competition, Finland and France for the quality of infrastructure, while only Luxembourg is mentioned for (freight) quality.



Following a meeting of MEP Wim van de Camp's High Level Rail Freight Group and a mini-conference of Transport & Environment concerning rail freight, the week ended with the EU Commission's Rail Freight Day Conference in Vienna on 9 December. All these events were exploring the reasons behind the inconsistent quality performance of rail freight uncovered by the European Court of Auditors, as well as the necessary actions to improve the situation.

Call for more rail freight in Germany

24 November 2016

Germany's railway sector associations joined forces ahead of the 2017 parliamentary elections to collectively demand that rail freight's market share is increased through a significant reduction of track access charges and the promotion of technology innovation in rail freight over the coming years.

By means of performance, quality and innovation the railway sector is confident that it is capable of rising to the competition posed by road haulage. However, public policy must do its side of the work: ecological considerations should be mirrored by transport policy; namely climate and other environmental considerations must be reflected in both legislative and regulatory actions.

Halving of track access charges and consistent financing for infrastructure maintenance and technology innovations, including digitalisation, should be ensured by the government so as to enable the fair presentation of the rail sector's services and innovations in the marketplace.

The position paper may be downloaded from here:
<https://www.vdv.de/03-11-2016-final-kernforderungen-eisenbahnverbaende.pdf?forced=true>



Turkish rail reform on track

1 January 2017



Rail Liberalisation Legislation, which took effect on 1 January 2017 in Turkey opens access to rail network, defines the procedure for usage of capacity and the content of contracts between infrastructure operator(s) and train operators as well as how restrictions/construction works should be managed.

The restructuring of TCDD and its operating subsidiary, TCDD Taşımacılık, was completed. Private operators will pay track access charges to TCDD. Rail freight customers – both existing and new – will be granted a wider range of choice in terms of service quality and pricing, a choice which train operator to use. With this legislation the Turkish railway reform has reached an important milestone.



Unified Railway Law for freight

15 December 2016

UNECE offers a regional framework for the elaboration and harmonisation of conventions, norms and standards for 56 countries. The administrative problems of rail should be solved through the initiative for the creation of Unified Railway Law (URL) that does not exist in the rail sector, although all the other transport modes already have some form of unified law.

Through the URL, operators will be able to carry out their activity within a single legal regime on the east-west axis, that connects Europe to Asia. The URL provisions, currently being tested on several corridors, will facilitate rail transport. Link: <http://www.railwaypro.com/wp/a-unified-railway-law-under-unece-to-facilitate-freight-transport/>



Intermodal benchmark from the USA

14 October 2016

A survey conducted as part of a recent study by Morgan Stanley and FTR Associates in the USA found that 46% of the companies planned to shift from pure road haulage to using intermodal transport.

Intermodal offers a buffer window for delivery dates, a valuable attribute to retail clients, who need very tight planning if deliveries are made by truck. Rail intermodal is thought of as competitive in the USA on distances from about 1000km. When factoring the local peculiarities of Europe, this figure compares favourably to the 882km average distance a CT consignment travelled in 2015 according to UIRR.



18-20% worth of cost savings were found to have been realised during the shift from road to rail intermodal. UIRR recommends to use these figures as benchmarks for European and Member State legislators.



Promotion of intermodal transport

December 2016



The European Commission mulled the Italian government's "Ferrobonus" scheme, which may amount to €20 million annually for a duration of 5 years (until 2020). The incentive was introduced as part of the 2011-2020 National Logistics Plan with a declared aim to compensate for the external costs of road – not reflected in the prices. Intermodal rail shipments are envisioned as a prime beneficiary.



Federal Transport Minister, Francois Bellot, announced the prologation of the existing intermodal transport subsidy of Belgium by four years. This incentive scheme should assist at a time, when the low oil price is artificially reducing the cost of road competitors. This symbolic support is part of Belgium's commitment to promoting modal shift with a view to combat climate change.

Technical report on megatruck trials in Germany

14 December 2016

The Federal Highway research institute of Germany (BAST) has published a detailed technical study covering every major aspect of the megatruck tests that have been undertaken since 2011:

<http://www.bast.de/DE/Verkehrstechnik/Fachthemen/v1-lang-lkw/v-lang-lkw-abschluss.html?nn=605156>.

The findings are sobering:

- **The vehicles:** certain megatruck combinations will not be capable to navigate in urban environments due to their spatial needs. Upgraded braking systems will be required on the trailers, including the need to equip them with brake-force dispensers and stabilisers. Additional technical equipment will be needed to assist the driver to have full visibility.
- **Road infrastructure:** as long as the gross weight of megatrucks does not exceed 44 tonnes, there has been no extra road degradation detected as compared to a regular HGV. Parking facilities and emergency pull-over bays will need to be adopted.

- **Operations:** additional loading and load securing rules will have to be adopted to ensure an even distribution of weight throughout the vehicle. Special rules will need to be devised for overtaking on single lane roads. The drivers will have to conduct extra checks and perhaps a brake test before starting.
- **Drivers:** extensive and regular psychological evaluation will need to be introduced for the drivers authorised to control megatrucks. Dedicated vehicle handling training will also be necessary.
- **Intermodal collaboration:** the trials could not confirm that megatrucks would be capable to perform first- and last mile operations as their useful load carrying capacity is limited for the needs.

UIRR looks forward to the economic analysis concerning the costs of all these technical details.

bast

Road freight study unveils competitiveness gaps

22 November 2016

A comparative study of employment and pay conditions of international lorry drivers completed by CNR in 15 European countries has highlighted huge disparities in operating costs. This suggests that a harmonisation in road hauliers' operating conditions and competitiveness across the EU is necessary.

The study takes into account lorry drivers' employment and pay conditions, including salaries, social security contributions, travel allowances, driving time and working hours. The study reveals that, taken as a whole, the cost-gap in terms of driving personnel is enormous. The same hour's driving in the same lorry on the same road with the same goods can cost €8 per hour or €33 per hour depending on whether the driver is employed by a Bulgarian company or a Belgian company; thereby the total annual cost of an EU international lorry driver ranges from €16,000 for a Bulgarian haulier to €56,000 for a Belgian haulier.

Competitiveness gaps of this magnitude cannot exist in a commonly shared – single – marketplace: any business based in a country with high living standards and correspondingly high minimum wages, which employs primarily low-skilled labour is bound to either go bankrupt or move its operations elsewhere.



EU expansion and the introduction of limited 'cabotage' (domestic transport) rights for international haulage operators in Europe's road haulage sector have seen haulage firms based in higher-cost countries such as Italy, Belgium, and France squeezed out of the international space over the past decade.

The European Commission is slated to present its much anticipated road initiatives this year, also encompassing the issues of intra-sectoral competitiveness detailed in the CNR study, as well as concerning internalization and fair infrastructure charging.

In light of the German technical report related to megatrucks (see article above), it remains to be seen what solutions can be found to resolve the contradiction between (sub-)minimal wage labour, a chronic driver shortage for long-haul assignments and the increased driver training and investment requirements linked to megatrucks.

The study can be downloaded from here: <http://www.cnr.fr/en/CNR-Publications/2016-social-synthesis-of-CNR-s-European-studies>

Digitalisation: business case road-rail CT

14 December 2016

UIRR and ERFA organized a Workshop on "Rail Freight Digitalization" with Road-Rail Combined Transport as business case. Under the coordination of Mr. Roland Klüber, more than 40 participants have debated with keynote ICT service providers in (rail) infrastructure, smart asset management, tracking and tracing applications to debate on the current progress in railway digitalization. The participants agreed that the ongoing researches and activities in the railway digitalization need to be intensified and better coordinated so that the new challenges of digitalization (agility, data science, algorithms and robotics) will be taken up more efficiently in the traditional ICT challenges. Participants did not consider that wordings as digitalization, industry 4.0 or Internet of Thing (IoT) are only new buzzwords for ICT but will profoundly modify the current traditional challenges and processes.



All interventions are available on the UIRR' website: <http://www.uirr.com/en/media-centre/speeches-and-articles/2017/mediacentre/828-uirr-erfa-workshop-on-rail-freight-digitalisation.html>

HubHarmony: a new R&D Project

November 2016

HubHarmony supports the harmonization of operational procedures and services offered at inland multimodal hubs to foster seamless operations. These goals will be achieved by (i) the development of a harmonization benchmark for inland multimodal hubs and (ii) an analysis of the impact of promising future value added services on the local economy and the development of inland multimodal hubs.

The benchmark methodology of HubHarmony results in a scoring system, which enables an evaluation of the harmonization level of operational procedures and the service offer in inland multimodal hubs. Operational procedures include hub technologies, business processes as well as administrative aspects and services include both, current services and promising future services. The benchmark uses the three pillars of sustainability (environmental, social and economic) to indicate how sustainable each hub type performs.



The harmonization benchmark will support future operators when planning the development of hubs and for its corporate identity. It further enables to monitor the progress of harmonization and to collect valuable data for future policy actions. HubHarmony will give insights into future dynamics and will indicate upcoming needs of logistics infrastructure with a focus on the interoperability and the harmonization of inland multimodal hubs.

The project partners are currently conducting a survey to gather some data on the current best practices in inland terminals. The survey can be found here: <https://survey.boku.ac.at/index.php/794298?lang=en>.

UIRR is a partner of the consortium led by the University of Natural Resources and Life Sciences, Vienna, Institute of Production and Logistics (Austria) and is assisting its member IFB, who is a demonstrator-partner of the project.

UIRR: ILU- and wagon-maker platform

30 November 2016

Under the sponsorship of the European Committee for Standardisation (CEN), UIRR officially launched – with more than 20 participants - its 'Collaborative Platform on Intermodal Loading Units and Wagons' in Brussels.

This Collaborative Platform consists of a group of experts with the aim to coordinate all activities related to intermodal loading units (ILUs meaning containers, swap-bodies and semi-trailers) and wagons (for vertical and horizontal transshipments) in order to ensure a full interoperability in the supply chain, mainly when the transport modes 'road' and 'rail' are combined.

The main task of this platform is to analyse and assess any road/rail legislations impacting the interoperability and the connectivity of the ILUs with the wagons, provide guidance and recommendations on all standardisation aspects related to ILUs and wagons, share and exchange best practices related to ILUs and Wagons, share and assess innovative ILU and wagon solutions, and support UIRR in its role of promoting Combined Transport in Europe. UIRR was pleased to integrate the following companies as formal partners of the platform: ILU-makers Krone, Modalis, Unit45 and Schmitz-Cargobull and wagon-makers VTG, Lohr and Ermewa.

UIRR Partner: Krone

December 2016

Family-owned Krone's product portfolio in its commercial vehicle business division includes curtainsiders, refrigerated and dry freight semitrailers, container chassis, swap body systems, trailers, motor vehicle superstructures and CEP (courier, express and parcel) vehicles.

Along its products, Krone offers a comprehensive service package that includes telematics, financing, rental vehicles, and the commercialisation of used vehicles, among others.

Over the past five decades, the Krone Group's annual sales volume has grown to €1.8 billion. This covers 48.000 vehicle units (37.000 semitrailers, 11.000 swap body systems) in 2016. The strongest market being Germany, with an unchanged 30% share of sales, followed by Western Europe (41 %) and Eastern Europe (27 %).

UIRR Partner: Modalis

December 2016

Modalis is recognized as one of the major European leasing and consulting players in the field of intermodal transport, modal shift and mobile storage.

Modalis offers its industrial customers, hauliers and transport operators an array of services ranging from the study of their needs through to the leasing and the trade of materials/equipment. Modalis proposes a unique approach starting with counselling, followed by designing, training and then by investing in state-of-the-art materials in terms of technology and regulations.

Modalis is actively involved in the work-groups of UIRR, CEN, ITCO and BIC as well as of other international organisations in order to contribute to the evolution of techniques and materials/equipment, which are aimed for road-rail combined transport and to intermodal transport in general. Equipment of offer includes: swap bodies, liquid or gas tank container, containers, container chassis and container wagons.

UIRR Partner: Schmitz Cargobull

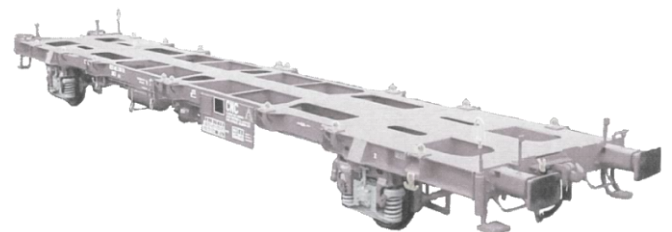
December 2016

Schmitz Cargobull manufactures semi-trailers and trailer bodies in the heavy commercial vehicle sector, with a special competence for semi-trailers for temperature-controlled and secure freight.

In addition to efficient and top-quality products, low life-cycle costs, high customer orientation and constant availability all contribute to the customers' success. Schmitz Cargobull provides a Europe-wide sales network with 43 of its own Schmitz Cargobull Trailer Centres and more than 1,200 authorised service partners.

Services begin with competent consulting and include a comprehensive range of trailer-related services such as tailored financing, comprehensive trailer telematics services, reliable, Europe-wide 24/365 spare parts supply, audited workshop partners, complete.

Schmitz Cargobull currently produces approximately 50,000 vehicles, for the markets of Europe, Middle East and Central Asia, as well as Australia and China.



UIRR Partner: Unit 45

December 2016

UNIT45 was established specifically to develop and market 45ft pallet-wide containers. This container size has become the standard unit for European intermodal transport as it enables operators to maximise cubic capacity and payload within the physical and regulatory constraints that apply to Europe's congested transport infrastructure.

Presently UNIT45 focuses on container equipment for shortsea/intermodal transport operators, offering 45ft, 48ft, 51ft and 53ft containers, which are available for (financial) lease, short- and long-term rental or purchase, including

- all types of reefers
- curtainsiders
- open top and bulk containers
- the vucaframe for finished vehicles, as well as
- the latest dry box that can incorporate 34 europallets

For operators wanting to add 45ft pallet-wide containers to their fleet, UNIT45 offers a range of financial packages to suit most requirements. In addition, the company has a very large rental fleet.

UNIT45
INTERMODAL INNOVATORS



UIRR Partner: VTG

December 2016

As one of the leading wagon hire and rail logistics companies in Europe, VTG offers an extensive range of multimodal logistics services with an emphasis on the rail transportation means as well as on the transportation of tank containers.

VTG acquired AAE and has now a comprehensive intermodal wagon fleet. The fleet consists in railcars suited for almost all modal units, from ISO standard containers (20ft, 40ft) to 45ft containers, swap bodies and semi-trailers as well as to special-purpose railcars for tank containers (Sgmmns 40ft).

In order to increase the profitability and productivity of its customers, VTG relies on innovative technology. The company has successfully tested the implementation of disk brakes and has equipped new-build wagons with this new system. Around a thousand wagons are already circulating in Europe with these low-noise and low-maintenance brakes.

As a rule, customers choose exactly the rolling stock that are best fitted for the intended purpose. Besides the hiring aspect, the range of VTG's services also includes full-service offers such as extensive repair and maintenance. The central management of the wagons is ensured by the colleagues of the Competence Centre in Baar. Moreover, the mobile service teams - a dense network of partner workshops in Europe as well as a broad spare part supply chain - minimize downtime and ensure maximum availability to the customers.

VTG



Recent Appointments and Personnel News

COMBIBERIA

1 January 2017



Mr Francisco González López was appointed Director General of Combiberia. Previously, Mr González López, a graduate of economics and business, has worked for major logistics and forwarding companies such as DHL, Maersk, Atwood Richards, UPS, Swift Air, the MRW Group and most lately for SEUR (DPD Group) as Director of Business Development prior to joining Combiberia. Mr González López is simultaneously an Associate Professor at ESIC and ICEMD business schools contributing to their masters' programmes.

NAVILAND CARGO

1 July 2016



Mr Eric Champeyrol has been appointed General Manager of Naviland Cargo. Educated in economics and law Mr Champeyrol began his career as Director Audit at SERNAM. In 2009, he joined the GEODIS Group as Quality Manager. Mr Champeyrol worked for Naviland between 2011-2014 in the capacities of Director of Terminals and as Operations Manager. Mr Champeyrol rejoined Naviland Cargo from the Combronde Group where he acted as the Chief Operating Officer in charge of the subsidiaries Ferrovergne and Prestalog.

EP TRAN COMMITTEE

January 2017



Ms Karima Delli, MEP of the Green Party, has been elected to the Chair of the European Parliament's Committee on Transport and Tourism (TRAN) as part of the routine election of functionaries. Ms Delli, who previously acted as her party's coordinator in the TRAN Committee, succeeds Mr Michael Cramer in her new function.

CABINET OF COMMISSIONER BULC

January 2017



Mr Jocelyn Fajardo, a Member of the Cabinet of Transport Commissioner Bulc responsible for land transport, has been appointed Deputy Head of Cabinet. With this, Mr Fajardo steps into the place of Ms Desirée Oen, who resigned from the Cabinet to join the DG MOVE.

Members' News

KOMBIVERKEHR

January 2017

New General Terms and Conditions

Click: <https://www.kombiverkehr.de/en/service/customers/news/new-general-terms-and-conditions-of-business-of-kombiverkehr-kg-from-1-january-2017>

TSA


November 2016

Terminal Service Austria opened the new Inzersdorf Terminal, also known as Freight Centre Vienna South

Click: http://www.oebb.at/infrastruktur/de/s_o_fuer_Generationen/s_4_Wir_bauen_fuer_Generationen/s_4_3_Schieneinfrastruktur/Grossraum_Wien/Gueterzentrum_Wien_Sued/

Key Dates & Events

| | |
|-----------------------|---|
| 2-4 March, Istanbul | Eurasia Rail 2017 |
| 14-16 March, Paris | SITL |
| 21-22 March, Brussels | CEN TC119 WGo6 meeting |
| 22-24 March, Prague | International Rail Forum and Conference |
| 4-6 April, Birmingham | Multimodal 2017 |
| 18-20 April, Moscow | TransRussia Transport Logistics Exhibition |
| 27 April, Vienna | ÖVG Fachtagung |
| 28 April, Sopron | KV Vernetzungstreffen |
| 9-12 May, Munich | Transport Logistic Exhibition |
| 22-23 May, Munich | 7th Nationale Konferenz Güterverkehr und Logistik |
| 23-24 May, Zagreb | RFC6 Conference & TAG6RAG Meeting |



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

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