

Combined Transpor

Q4.2017 | 14 March 2018





Three months of recovery

UIRR member Combined Transport Operators realised confident growth in the last quarter of 2017, as railway traffic resumed along the Rhine Valley and there were no other major hindering factors; this is reflected by the record high value of the Quarterly CT Performance Gauge. The UIRR CT Sentiment Index remains at "slightly positive", which indicates continued – though modest – optimism for the coming twelve months.

While rail traffic was restored thanks to an ingenious engineering intervention, the confidence of shippers in road-rail Combined Transport was undoubtedly shaken by the Rastatt disaster. The

disruption highlighted the inadequacy of cross-border collaboration among the actors of the railway sector, the persistent obstacle of the 'language issue' and the overall lacking contingency plans. The European Commission undertook the initiative to bring together the relevant stakeholders to quickly deliver solutions on these issues seen as vital to restore market confidence.

Deliberation of the Commission's proposed amendment of the Combined Transport Directive commenced in both the TRAN Committee of the European Parliament and the Transport Council Working Group – whose agreement is needed to pass the amendment into law. UIRR's position paper was published on 23 January, a week before the well-visited UIRR-IANA intermodal exhibition opened in the building of the European Parliament.

The rail sector took to the implementation of the new rules for access to transhipment terminals and other rail-related service facilities. A draft template was developed to aid the production of the Service Facility Statements, and the first sector-wide debate was held on it. Simultaneously, the European Commission decided to start contract negotiations with the consortium that offered to develop the Common Portal contained in the Implementing Regulation.

Several encouraging freight-related infrastructure development commitments were announced during the final months of 2017: Poland is to receive substantial EU funds for line modernisation, funding for Terzo Valico, the all-important new connection to the north of the Port of Genoa has been secured and DB Netze announced a thrust to upgrade its network to allow the circulation of 750-metre long freight trains.

Besides the good news, Combined Transport operators are following with increased anxiety the track access price increasing ambitions of several Member States. Infrastructure charges are already the largest cost component of rail freight, and no amount of state aid to rail freight will be able to compensate for the substantial TAC increases foreseen in Austria, Germany, Sweden, the Netherlands and the UK – just to name a few.

The membership of UIRR was enhanced by the accession of the first member of UIRR from Greece, SRS Terminal in Thessaloniki, while important Memoranda of Understanding were signed with Assologistica of Italy and the European Chemical Transport Association (ECTA).

Ralf-Charley Schultze – President





Conference "Multimodal Year 2018 – the future of intermodal"

Brussels, 16 May 2018





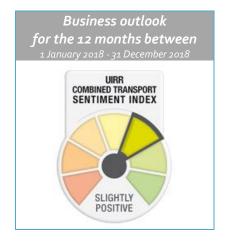
Multimodal Freight Conference

Sofia, 20 March 2018

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Follow-up of the Rastatt disaster

February 2018

The unplanned, yet man-made, construction disaster that resulted in the suspension of traffic for nearly two months on a strategic railway line near the German town of Rastatt in August 2017 will forever enter into the history book of European railways.

Besides the loss of traffic and revenues, as well as the substantial extra costs suffered by the stakeholders, the incident highlighted a number of weaknesses of rail infrastructure managers:

- The lack of readiness to solve a crisis with cross-border implications, which requires cooperation with infrastructure managers of neighbouring countries;
- The problems caused by obsolete communication techniques used between traffic controllers and train drivers, as well as language problems in communication between infrastructure managers as well as with railway undertakings – widely referred to as 'the language issue'; and
- The overall lacking contingency plans that should extend to obtaining traction capacities, qualified train drivers and comfort in covering the financial burden of crisis management.



DG MOVE undertook the coordination of development of a comprehensive contingency plan template for infrastructure managers that should address all issues. Deadline for the work undertaken with UIRR's participation is July 2018. The result should help restore the shaken market confidence in the reliability of rail freight.

Simultaneously, the sector – including UIRR – has entrusted a consultant to draft a report on the comprehensive financial costs of the Rastatt disaster. The study will contain a thorough inventory of every cost and/or lost revenue endured by the stakeholders due to the calamity.

Implementation of the new EU rules for terminals



January 2018 http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32017R2177&from=EN

Commission Implementing Regulation 2017/2177 of 22 November 2017 on access to service facilities and rail-related services established a kind of general terms and conditions for the nine categories of rail service facilities listed in Annex II of the Single European Railway Area Directive (2012/34):

- 1. passenger stations
- 2. freight terminals
- 3. marshalling yards and train formation facilities, shunting yards
- 4. storage sidings
- 5. maintenance facilities
- 6. cleaning and washing facilities
- 7. maritime and inland port facilities linked to rail activities
- 8. relief facilities
- 9. refuelling facilities

The rules described in the Implementing Regulation must be complied with by 1 June 2019, while exemptions can be communicated to the Regulatory Bodies from 1 January 2019.

The European Commission has launched the most important preparatory work: the development of a template for the Service Facility Statement. Rail infrastructure managers – who double as the largest owners/operators of service facilities as well as they are responsible for the publication of the information – were invited to produce a draft and then launch a comprehensive consultation on this draft with the Regulatory Bodies and the wider group of sector stakeholders, including UIRR.

Several challenges are posed by the Implementing Regulation from the perspective of freight terminals, which include combined transport transhipment facilities, that will have to be answered before completing the work. A definition of 'freight terminal' is missing from both the Directive and the Implementing Regulation, which means that an understanding will have to be developed that will stand up in a court of law and be acceptable for Regulatory Bodies as well.

Also, a universal interpretation of the exemption criteria – especially the one related to "operating in a competitive market environment" – will have to be developed. For both, UIRR is consulting with the European Commission and the association of Regulatory Bodies (IRG-Rail).

Besides regulatory compliance considerations, UIRR keeps underlining the importance of *market needs for transparency* as the motivation behind the entire exercise to harmonise the structure of these – essentially – General Terms and Conditions.

Moreover, the *ease of use* of the data to be made public and the *dynamic information* to be provided alongside the static ones should also not be forgotten.

It is for this reason that UIRR continues to strongly support the concept of a *Common Web Portal* – mentioned in the Implementing Regulation – for the whole of Europe. Driven by competition neutrality considerations, this portal should be owned by the European Commission and operated by a neutral entity.

It is UIRR's knowledge that DG MOVE has already started the final contract negotiations following its call for proposals to create the Common Web Portal, and soon the Portal will be under construction – in time to meet the implementation deadline.



Progress of the CT Directive amendment

February 2018



The Transport and Tourism (TRAN) Committee of the European Parliament has started its deliberation of the Amendment proposal with the leadership of rapporteur Daniela Aiuto (FDD).

The shadow rapporteurs of the dossier from the other political groups are Izaskun Bilbao Barandica

(ALDE), Jakop Dalunde (Greens), Isabella De Monte (PES), Claudia Schmidt (EPP) and Kosma Złotowski (ECR).



The draft report of Ms Aiuto is expected to be presented in the Committee in late April, while primary debate is expected before the summer recess.







The Transport Council Working Group of the 28 Member State Ministry of Transport representatives has also commenced with its consideration of the dossier. The motivation for the Bulgarian Presidency is to identify the main topics by the Multimodal Freight Conference, organised together with the Commission, on 20 March.

The Bulgarian Presidency should be passing over the dossier to the Austrian Presidency, in charge of the European Council during the second half of 2018, with a meaningful progress report – considered by the Transport Ministerial Council on 7 June. This would make the negotiations of the ultimate Member State compromise feasible before the end of the year.

Ideally any difference that may emerge between the Parliament's and the Council's position should be ironed out by the very end of 2018, which would be needed to have the final votes before the end of the Parliament's mandate in April 2019.

UIRR-IANA Intermodal Exhibition

30 January 2018

UIRR, together with its American sister organization IANA, the Intermodal Association of North America, produced an exhibition in the building of the European Parliament titled Intermodal Transport in Europe and North America: What can we learn from each other?



Wim van de Camp hosted the exhibition that was officially opened on 30 January. He conveyed the strong preference of the European Parliament for "more intermodality".

Transport Commissioner Violeta Bulc used the occasion to launch her Multimodal Year 2018 initiative. She stated that more cooperation of the different modes will be needed if the necessary decarbonisation of transport is to be achieved.







Belgian Minister of Transport François Bellot, delivered the message of Member States – speaking for the European Council. Accordingly, intermodality is indispensable to solve the road congestion and air pollution problems of Europe.

The Exhibition panels can be viewed here:

http://www.uirr.com/en/component/downloads/downloads/1303.html

The handout, providing the background, is to be found here: http://www.uirr.com/en/component/downloads/downloads/1289.html

A short video of the opening can be viewed here:

http://www.uirr.com/en/media-centre/videos/mediacentre/941-uirr-iana-intermodal-exhibition-january-2018.html

The photos of the exhibition can be found here:

http://www.uirr.com/en/media-centre/picture-gallery/uirr-iana-exhibition-january-2018/category/10.html





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MOBILITY AND TRANSPOR

Single European e-Freight Transport Document

January 2018

Two European Commission's initiated public consultations were recently concluded as the final input to the drafting of a legislative proposal by DG MOVE concerning a Single European Electronic Freight Transport Document. This regulation is expected to be not only the prime output of the Digital Transport Logistics Forum (DTLF) but also the flagship proposal of the Multimodal Year 2018.

The Commission proposal is expected to address the issues mentioned in the position paper on multimodal digitalisation by the I AM Connectivity Platform that includes UIRR in July 2017: http://www.uirr.com/en/component/downloads/downloads/1230.html.

Within Road-Rail Combined Transport, the most advanced in digital transport document use is the road sector with the eCMR. While the mutual recognition of the eCMR has been in place for some time between France and Spain, the Benelux trial of eCMR use has started in 2018, whereas the electronic road transport document will be mutually accepted in The Netherlands, Belgium and Luxembourg.

The UIC's eRail Freight Project aimed to test the use of paperless consignment notes between France and Italy. However, the rail freight sector must do more to create the eCIM consignment note and have it recognised as an official customs declaration document – like the eCMR – in order to spread. Work is under way to do the necessary changes to the CIM Annex of COTIF to achieve this.

Digitalisation of freight transport documents promise substantial benefits: introducing the eCMR in The Netherlands, where 40 million consignments notes are produced each year, the related saving is estimated to be as high as €180 million alone. And digitalisation also helps prevent errors as well as it makes tracking and tracing easier.

Digitalisation must advance in intermodal transport, which will pose the challenge of creating complex interfaces between IT systems of the different modes as well as terminals and ports.

Rail infrastructure developments for freight

ests.



January 2018

Italy: a new bordercrossing railway line between Varese and the Swiss border opened for commercial traffic on 7 January. This will be complemented further line upgrades ultimately Terzo Valico - a brand new line that connects Genoa with Alessandria (53km in total, of which are tunnels). Upgrading of the Genoa iunction has also which started, is promised to he completed by the end of 2019.



Terzo Valico will make 750-metre-long trains possible through to the Port of Genoa along the Rhine-Alpine Corridor. The completion of the Terzo Valico project is scheduled for 2022.

Germany: the Ministry of Transport has confirmed last year's Rail Freight Masterplan (https://www.bmvi.de/SharedDocs/EN/publications/rail-freight-masterplan.pdf?_blob=publicationFile), which prescribes as the number one priority the need to enable the circulation of 750-metre-long freight trains. Currently only 11% of freight trains are this long in Germany. €405 million can fix the minor bottlenecks that could open the possibility of these longer and more productive freight trains to circulate more widely. The decision to accelerate the more excessive works needed to reach the desired standard EU train length on the entire network has also been taken.

France: the contract to build the 57,5km tunnel on the Lyon-Turin railway line was awarded. The



new tunnel will not only cut travel time to less than half, but even more importantly will increase substantially the train path capacity and allow 750m freight trains to travel with a single locomotive. The new line will be complete in 2030.

EU funds to modernise Polish intermodal infrastructure

October - November 2017

€240 million of EU Cohesion Fund resources were awarded to upgrade intermodal infrastructure in Poland, which work will last until 2023. The money will be used to finance modern equipment, such as for loading, telematics and satellite systems as well as for the purchase of new trains suitable for intermodal transport. Poland will participate with at least 50% of funding in the projects. Ongoing private terminal investments must not be negatively affected.

Poland announced the reconstruction of the 118km railway line between Siedlce and Terespol, which is a key section of the North Sea — Baltic Rail Freight Corridor and strategically affects Trans-Eurasia traffic and access to the Małaszewicze transhipment terminal. The works should be concluded by 2020. Related access line modernisation works will be conducted in two parts until 2019 and 2022.

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Live test of automatic freight train operation

Betuweroute

January 2018

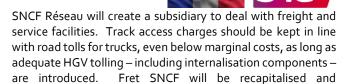
The contract to test automatic train operation along the freightdedicated Betuweroute railway line in The Netherlands has been signed. Infrastructure manager ProRail, freight railway Rotterdam Rail Feeding and technology provider Alstom will come together for the trials over the course of 2018.

The test will be conducted along a 100km section between the Port of Rotterdam and the CUP Valburg terminal. The test runs will mean that a driver will only supervise the operation of the train onboard the locomotive. Automatic train operations (ATO) is expected to lower energy consumption and increase infrastructure capacity.

French railway reform study unveiled

Jean-Cyril Spinetta delivered his study on how he recommends to implement railway reform in France: https://www.ecologiquesolidaire.gouv.fr/sites/default/files/2018.02.15_Rapport-Avenirdu-transport-ferroviaire.pdf

Accordingly, as President Macron committed to implement it in a speedy fashion, Germany's DB model will be followed. In freight the goals will be cost reduction and efficiency improvements. Service quality of the infrastructure and service facilities should be boosted while better quality train paths will be offered.



Labour action against the reforms are expected as the special civil servant status of railwaymen will also be discontinued. The first strike has already been announced for 22 March.

Track access charging changes are nearing

Implementation of the changes to the method of calculating track access charges (TAC) approved in the Single European Railway Area Directive (2012/34) and detailed in the Implementing Regulation on Calculation of Direct Costs of Infrastructure (2015/909) has reached the final stages. The redesigned national TAC systems, including the first application of mark-ups for freight, will begin to apply from December 2018.

While France has recognised in its rail freight restructuring plans that any TAC-changes must reflect on the applicable road tolls for HGVs, several other Member States are choosing a different path.



restructured to boost transparency and performance.





Germany's Bundesnetzagentur (BNA) has already approved changes that will result in significant increases for freight trains on several sections. For instance, dangerous goods trains will be charged €3.48/tkm while heavy trains will be charged €4,1/tkm from 9 December 2018.

The Netherlands authorised ProRail to introduce mark-ups that are expected to improve train path use, encourage energy efficiency and surcharge the transport of dangerous cargo.

The United Kingdom's Office of Rail Regulator has approved Network Rail's mark-up plans that are based on the type of cargo carried and is preceded by an 'ability to pay' test.

Distance-based tolling for trucks is coming

December 2017

The governments of Bulgaria, The Netherlands and Sweden have announced plans to introduce distance-based road tolls for heavy goods vehicles using major transit roads on their territories. In both cases, the new method of road user fee collection will replace timebased ('vignette') schemes.

Bulgaria's truck toll system will be implemented by the end of 2018, and it will apply to all commercial vehicles heavier than 3,5 tonnes. Sweden's government has also committed to implementing such a charging scheme but not before 2019.

The Netherlands, once a staunch defender of vignettes, is less specific about the timing of implementation as the toll collection technology will have to be installed first.

These three countries will increase the number of EU Member States using distance-based tolling for trucks to 12, which is encouraging ahead of the upcoming vote to amend the Eurovignette Directive that regulates road tolling systems within the European Union.



December 2017

Automatic axle load sensors were installed into the pavement at 89 locations along Hungary's tolled road network to automatically monitor the axle load of heavy goods vehicles.

The trial operation of the system, known as NTM, has been running between August and December. According to the data collected between 5-15% of trucks are circulating with overloaded axles. Automatic sanctioning of overweight trucks will begin from January 2018.

The NTM axle load control complements the HU-GO distance-based tolling scheme and the EKAER road haulage registration system collectively enable the thorough controlling of commercial road traffic.



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Cargo theft on roads is increasing in Germany

7 Transported Asset Protection Association

December 2017

According to data collected by TAPA, the Transported Asset Protection Association, €1,3 billion worth of cargo was stolen from 26.000 trucks in Germany over the course of 2017. In addition to the value of the goods, the group says further damages of €900m are caused by penalties for delivery delays, the cost of replacing stolen products and repairing damage to vehicles targeted by cargo thieves.

TAPA hopes to extend its data collection to additional EU Member States to better understand the true scope of the problem. The worldwide association has 800 member-companies who systematically report all manners of security incidents in order to create greater transparency and a better understanding of the problem.

Battery electric barges to appear soon

17-19 September 2017



The development of battery-powered electric barges has begun with funding from the EU and the ports of Amsterdam, Antwerp and Rotterdam. The 52m-long and 6,7m-wide vessels will be

capable of carrying 24 containers. In theory the e-barges will be capable of autonomous circulation, however in the beginning they will have crew on board.

The easily replaceable battery packs can be charged using renewable sources of electricity that will translate to a zero carbon footprint, coupled with smaller spatial need than the present day internal combustion engines and fuel tanks.



HubHarmony Project update

December 2017

www.hubharmony.eu

Started in 2016, the HubHarmony project, funded under the ERA-Net program, aims to develop a better understanding of sustainable transport systems through the development of a harmonization benchmark for intermodal hubs. It will help to improve hub processes and gain synergies from the hub network. Moreover, an analysis of the impacts of future value-added services on the local economy and on the development of inland intermodal hubs will be provided.

ILU-Code usage is on the rise

December 2017

https://www.ilu-code.eu/en/

In accordance with the European standard EN13044, UIRR began issuing the ILU-Code owner-keys over six years ago, in July of 2011. Nearly 1.000 outstanding ILU-Code owner-keys were in use at the end of 2017 to mark intermodal loading units carried in unaccompanied combined transport throughout the European Union.

German, Italian, French, Turkish and Swiss companies made the most registrations while companies from altogether 26 countries possess an ILU-Code already.

Sector players presently report a 93-97% voluntary compliance rate with the identification regime described in EN13044. In order to unlock the full digitalization potential offered by the BIC Code and the ILU-Code, 100% compliance will have to be achieved.

The EU's Modernised Customs Code will require from 2020 that all intermodal loading units – containers, swap bodies and semi-trailers – entering or leaving the European Union are identifiable in accordance with ISO6346 (the BIC Code) or EN13044 (the ILU-Code).

UIRR hopes that the European Council and the European Parliament will agree with the Commission's proposal to mandate the ISO6346 and EN13044 compliant identification regime for use in intra-EU unaccompanied combined transport operations as well.

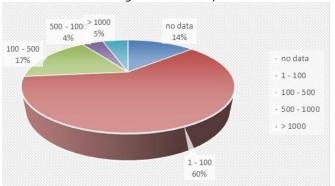
The use of Optical Character Recognition (OCR) in data entry, booking and tracking & tracing systems, as well as the future EU Electronic Freight Transport Document will all depend on a standardised identifier for intermodal loading units.

Under the coordination of the Institute of Production and Logistics at the University of Natural Resources and Life Sciences in Vienna (BOKU), UIRR has been subcontracted to provide its expertise as representative of the terminals in Europe with a focus on data analytics, KPIs and value-added services. The project results will be presented at the Transport Research Arena in April 2018 (Vienna).



ILU-Code owner-key registrations by company size

on 31 December 2017



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New member: SRS Thessaloniki Terminal

January 2018

http://srs-sa.com/

Sindos Railcontainer Services S.A. is a privately-owned railway terminal in Thessaloniki that operates since 2004 in the industrial area of Sindos, and that is the only operating intermodal terminal in North Greece. Located in a strategic point, the SRS Terminal is located 70km from the border with the Former Yugoslav Republic of Macedonia, 15km from the Port of Thessaloniki and 90km from the border with Bulgaria.

The proximity to the Port of Thessaloniki enables to provide various solutions of transport to Turkey and Cyprus weekly. Direct train connections run 6-8 times per week from/to Thessaloniki to Central European destinations of Budapest, Curtici, Duisburg, Lambach, Mannheim and Vienna.

The terminal covers 35.000m². Three railway tracks accessible by mobile reachstacker are at the core of the terminal that also offers supplementary services such as the intermediate storage of loading units, warehousing as well as customs agency.



SRS Terminal became the first member of UIRR from Greece.

New MoU: Assologistica

December 2017

http://www.assologistica.it/

Assologistica and UIRR concluded a Memorandum of Understanding in December, the 11th such agreement where the partners agree in their desire to promote intermodal transport

Founded in 1947, Assologistica is the association of logistics companies, general warehouses and refrigerators, port terminal operators, intermodal terminals and airports.

The association represents over 250 member-companies operating in Italy: with 70,000 direct and indirect employees, with 22 million square meters of indoor covered areas, with 4.5 million cubic meters of cold stores and 60 million square meters in maritime and intermodal terminals.



New MoU: European Chemical Transport Association

December 2017

https://www.ecta.com/

ECTA, European Chemical Transport Association, gathers European Land Transport Companies with the aim to improve the standards of efficiency, safety and quality as well as the environmental and social impact of the transport and logistics of chemical goods in Europe.

The association, which became the 12th MoU partner of UIRR, speaks for the chemical transport industry to all its stakeholders and organises the Responsible Care Initiative for the European land transport industry.

ECTA provides the chemical transport industry with an authoritative voice at European level. Within that scope it ensures that the industry's views are effectively communicated to key audiences, authorities and institutions within Europe at regional, national, international and European level. It co-operates and participates in the dialogue between logistics service providers, the Chemical Industry, the authorities and the institutions to proactively improve the health, safety, security and environmental performance of transport of chemical goods in Europe.





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Personnel News

TERMINAL SERVICE AUSTRIA



RAIL CARGO OPERATOR January





RAIL CARGO OPERATOR January



Renate Glisic was appointed Head of Business Unit Terminal Service Austria (TSA), at ÖBB Infrastruktur AG. Dr Glisic, who obtained her degree from the University of Linz, has fulfilled leadership postions at Gebrüder Weiss, Polyplex GmbH, SAT Albatros Sea-Air Transport and S.A.T. Verwaltungs GmbH, Rentas Management Beteiligungs GmbH and GR Management GmbH. Dr Glisic also is a lecturer for "Diversity Management in Practice" (Master Studies Finance and Accounting) at Johannes Kepler university, Linz.

Christopher Müller is the new co-managing director of Rail Cargo Operator – Austria GmbH. After studying law in Vienna, Christopher joined the Rail Cargo Group legal department in 2011, later he worked as an executive assistant to the board of Rail Cargo Group, and, in 2015 took over the management of RCO-Austria's Maritime North/West Department, successfully developing intermodal products from Rotterdam, Hamburg and Bremerhaven. As of January 1, 2018, Christopher Müller became managing director of Rail Cargo Operator – Austria GmbH, alongside Tufan Khalaji.

Agnes Hernad was appointed Managing Director of Rail Cargo Operator Hungaria Kft. Previously, Ms Hernad, an economist by training, worked as the Ocean Freight Director of DHL Forwarding Kft and in different management positions at Safmarine Container Lines and Maersk Hungary.

Members' News

FFLB Shipping of dangerous goods to/from China becomes authorised

October 2017 Click: http://felb.world/news.htm

HUPAC Transportation growth despite Rastatt shutdown

February 2018 Click: http://www.hupac.ch/EN/Transportation-growth-despite-Rastatt-shutdown-e1969coo

KOMBIVERKEHR National transport on the rise, limited growth in international transport

February 2018 Click: https://www.kombiverkehr.de/en/presse/Press_Releases/:Kombiverkehr_National_transport_on_the_rise, limited_growth_in_international_transport

RALPIN 109.000 lorries transferred to rail

January 2018 <u>Click</u>: http://www.ralpin.ch/appl/file.php?id=996

Key Dates & Events

20 March 2018, Zeebrugge	Rhine-Alpine Corridor Terminal Advisory Group meeting
20-22 March 2018, Paris	SITL Exhibition
4-5 April 2018, Amsterdam	Track Access Charging Summit
12-13 April 2018, Lübeck	IBS Annual Conference
18 April 2018, Brussels	ERFA Annual Event
25-27 April 2018, Ljubljana	TEN-T Days Conference
16 May 2018, Brussels	UIRR-ERA conference: Multimodal year 2018 – the future of intermodal
17 May 2018, Brussels	UIRR Ordinary General Assembly
23-25 May 2018, Leipzig	International Transport Forum Summit
24 May 2018, Hamburg	European Intermodal Logistics 2018: shaping the future conference
19 June 2018, Brussels	CER 30-year Anniversary
27-29 June 2018, Genoa	UIC Global Rail Freight Conference
16-18 September 2018, Long Beach	IANA Intermodal Expo



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