



Pandemic and economic crisis

European Combined Transport volumes declined by nearly 15% during the second quarter of 2020 as a result of the economic slowdown that goes hand-in-hand with the coronavirus pandemic. The year-to-date decline of intermodal traffic exceeds 7%. The ongoing economic disruption is foreseen to weigh heavily on Combined Transport. While the sector is working hard to maintain services and to acquire new customers, the sentiment of CT actors for the next 12-month period remains 'negative' for the second quarter in a row.

Intermodal rail is the only production system of rail freight that delivered consistent and dynamic growth during the decade since the 2008-9 economic crisis. While in 2019 the EU GDP expanded by 1,7%, and the tonne-kilometre performance of road haulage grew by about 1%, rail freight contracted by nearly 2%. During the same year European Combined Transport delivered 1,5% growth in intermodal rail tonne-kilometres.

The April-June period brought the harshest shutdown of European social life and economic activity since World War II. The disruption resulted in a 12% GDP decline in the second quarter of the year. The extent of the ongoing disruption and its effects, when factoring the unabated advance of climate change, remains to be understood. The unprecedented developments and the scale of government interventions make the estimation of the outcome very difficult.

Mobility Package 1 is a phenomenon, specific to the European surface transport sector, which further complicates the prediction of what is to be expected. The legislative package passed in early July. It consists in not only a refinement but in a fundamental rewriting of the rules of road haulage within the European Single Market. Extensive business model changes are likely to be the result, which will go well beyond the road sector and impact longer distance continental surface freight transport – that includes Combined Transport as well – on a grand scale.

Additional legislative changes are expected since Mobility Package 2 and 3 remain work-in-progress. Most prominently the Eurovignette Directive, which addresses road tolling, is expected to result in further significant changes. The recast of the Combined Transport Directive is promised to be unveiled in May 2021 alongside the proposed amendments to the Rail Freight Corridor and the Trans European Network for Transport (TEN-T) Guideline regulations and a major amendment of the Fossil Fuel Taxation Directive. These legislative proposals take their cue from the European Green Deal that was designed to stop climate change, hence they promise to result in additional changes.

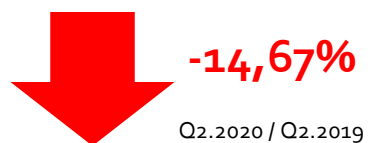
UIRR held its annual Ordinary General Assembly via videoconference on 19 May. The association's members closed a successful year that delivered a historic high of 8,8 million TEUs transported. DG MOVE Director General Mr Henrik Hololei and Land Transport Director Elisabeth Werner offered a video-consultation to the CEOs and Chairpersons of UIRR member companies on the occasion, where the understanding of the European Commission that Combined Transport has to play a prominent role in the future of the European Union was confirmed.

Ralf-Charley Schultze – President

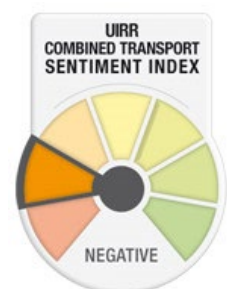
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UIRR Quarterly CT Performance Gauge



Business outlook for the 12 months between 1 July 2020 - 30 June 2021



Growing together

UIRR
 INTERNATIONAL UNION
 FOR ROAD-RAIL
 COMBINED TRANSPORT

European Intermodal Summit

- to commemorate the
 50th Anniversary of UIRR's founding

Web-conference, 27 October 2020

DIGITAL TRANSPORT DAYS
 ONLINE EVENT 18. NOV 2020
 #digitaltransport #rethinkingtransport



Digital Transport Days

Online Event on 18 November 2020

Quality Performance of Rail Freight

Rail freight steps up to deliver for the UK during the pandemic

June 2020

Trade associations, FTA and RFG, praise the performance of rail freight during the time of the coronavirus pandemic.

Link: <http://www.uirr.com/en/news/mediacentre/1547-rail-freight-steps-up-to-deliver-for-united-kingdom.html>

EGD components: 750m-long trains and polluter-/user-pays principle

June 2020

The Community of European Railways and Infrastructure Managers (CER) pointed out that the achievement of the European Green Deal (EGD) objectives will not be possible without enabling the circulation of 750m-long freight trains and the correct application of the user-pays and polluter-pays principles in EU transport law.

Links: <http://www.uirr.com/en/news/mediacentre/1580-european-green-deal-impossible-without-longer-trains.html>
- <http://www.uirr.com/en/news/mediacentre/1601-help-europe-recover-with-user-pays-polluter-pays-principles.html>

Rail freight to be repaired in France

June 2020

4F, "Fret Ferroviaire Français du Futur", is a new alliance of the sector with a mission to safeguard and develop rail freight. The French government's ambition is to redevelop railways, with an emphasis on increasing the share of freight carried.

Link: <http://www.uirr.com/en/news/mediacentre/1561-4f-an-unprecedented-alliance-to-repair-french-rail-freight-of-the-future.html>
- <http://www.uirr.com/en/news/mediacentre/1599-french-freight-revival-planned-by-president-macron.html>

Pandemic opens opportunity for rail freight

June 2020

The European Rail Freight Association (ERFA) pointed out that a significant increase in the supply of services and the punctuality of rail freight occurred during the pandemic-related suspension of passenger rail services.

Link: <http://www.uirr.com/en/news/mediacentre/1575-freight-by-train-a-business-to-develop-spanish.html>

Satisfaction with rail freight and intermodal rail reaches new high

July 2020

61 % of rail freight clients and 68 % of intermodal shippers declared themselves satisfied with the French rail transport offer in 2019, a 6- and 17-point respective improvement over 2018 and 2017.

Links: <http://www.uirr.com/en/news/mediacentre/1595-combined-rail-road-further-strengthens-its-positions.html>

Transcontinental intermodal rail performs superbly

May/June 2020

Substantial investments and reliable services resulted in a new volume record on the broad-gauge northern routes that connect Europe with China through Russia. At the same time, a new speed record was achieved on the middle-corridor that offers an end-to-end UIC gauge connection. Collectively, transcontinental rail delivered a new historic high during the pandemic.

Links: <http://www.uirr.com/en/news/mediacentre/1548-intermodal-rail-from-china-reaches-record-level-in-april.html>
- <http://www.uirr.com/en/news/mediacentre/1537-coronavirus-shutdowns-shippers-turn-to-belt-and-road-trains.html>
- <http://www.uirr.com/en/news/mediacentre/1600-new-records-set-on-the-middle-corridor-to-turkey.html>

Fair, Mode-neutral Regulatory Framework

Mobility Package 1 and Combined Transport

June/July 2020

UIRR warned that the adoption of Mobility Package 1 the way agreed in the trialogue would seriously disrupt several existing CT operating models. Regrettably, the legislation was passed into law. The European Commission is conducting an impact assessment to determine the extent of damage that the new provisions may cause to European Combined Transport.

Link: <http://www.uirr.com/en/media-centre/press-releases-and-position-papers/2020/mediacentre/1563-uirr-press-release-combined-transport-should-not-be-collateral-damage.html>
- <http://www.uirr.com/en/media-centre/press-releases-and-position-papers/2020/mediacentre/1588-mobility-package-1-becomes-the-law-of-the-european-union.html>

Mode-neutral EU regulatory framework is a must

April 2020

UIRR pointed out that horizontally structured, mode-neutral transport legislation is a prerequisite of a fair regulatory framework in transport that is to deliver competition based on technical merit and management excellence.

Link: <http://www.uirr.com/en/media-centre/press-releases-and-position-papers/2020/mediacentre/1518-uirr-press-release-combined-transport-resilience-and-greening-at-the-same-time.html>

Germany pledges aid to LNG trucks, but not to rail or intermodal

May 2020

The German Parliament agreed to the prolongation of the state aid scheme offered to the purchase of liquefied natural gas-powered long-distance trucks. Simultaneously, the Ministry of Transport rejected a request for a corresponding toll-waiver for road position legs of CT transport chains. UIRR has pledged to study the German situation with a view to preparing an illegal state aid complaint.

Link: <http://www.uirr.com/en/news/mediacentre/1558-state-aid-for-lng-powered-trucks-in-germany-harms-intermodal-transport.html>

- <http://www.uirr.com/en/media-centre/press-releases-and-position-papers/2020/mediacentre/1540-uirr-press-release-no-more-distortion-to-the-land-freight-transport-market.html>

- <http://www.uirr.com/en/news/mediacentre/1564-keine-beschraenkung-der-kabotage.html>

Modal shift occurs during pandemic in The Netherlands

May 2020

A considerable modal shift to intermodal rail has been achieved between The Netherlands and Italy.

Link: <http://www.uirr.com/en/news/mediacentre/1541-corona-crisis-reinforces-modal-shift-to-rail.html>

Enhancement of Intermodal Transport

2019: difficult yet historic year for European Combined Transport

May 2020

UIRR's annual Ordinary General Assembly observed the closing of a difficult business year for European CT in 2019 marred by several difficulties. Nevertheless, UIRR members achieved a growth of 1,5%, which translates to a historic high in transport volume. More details are to be found in the UIRR Report 2019-20.

Links: <http://www.uirr.com/en/media-centre/press-releases-and-position-papers/2020/mediacentre/1550-uirr-press-releaseclosing-of-the-2019-business-year.html>

- <http://www.uirr.com/en/media-centre/press-releases-and-position-papers/2020/mediacentre/1583-uirr-press-release-a-difficult-yet-historic-year.html>

CT's place within the 70-year-old European Single Market

May 2020

UIRR pointed out on the 70th anniversary of the Schuman Declaration that European Combined Transport has always delivered effective solutions to every challenge posed by the times.

Link: <http://www.uirr.com/en/media-centre/press-releases-and-position-papers/2020/mediacentre/1536-uirr-press-release-combined-transport-and-the-european-common-market-.html>

Combined Transport during the coronavirus pandemic

April-June 2020

France, Italy, Poland, Spain and the entire Baltic region saw superb performance and new Combined Transport services were launched during the pandemic months of Spring 2020. Taking advantage of the new services, an increasing number of shippers became first time users of Combined Transport.

Link: <http://www.uirr.com/en/news/mediacentre/1543-resilience-of-road-rail-ct-in-times-of-crisis.html>

- <http://www.uirr.com/en/news/mediacentre/1535-the-french-choose-the-made-in-italy-intermodal.html>

- <http://www.uirr.com/en/news/mediacentre/1553-the-first-pilot-train-for-standard-semi-trailers-in-the-baltics.html>

Terminals: new construction, track extension, automation

May-June 2020

Terminal automation, the extension of existing tracks shorter than 750 meters and the construction of new terminals were all disclosed as new investments and technology developments have been announced by private actors.

Link: <http://www.uirr.com/en/news/mediacentre/1581-h-essers-invests-30-million-in-new-containerterminal.html>

- <http://www.uirr.com/en/news/mediacentre/1546-the-focus-of-automation-is-shifting-to-brownfield-container-terminals.html>

Intermodal hinterland transport booking platform by HHLA

July 2020

HHLA launched *Modility* (<https://www.modility.com/landingpage/carrier>) a new booking platform for intermodal transport services with a view to boost the share of rail-based connections in Europe, not only to/from the Port of Hamburg.

Link: <http://www.uirr.com/en/news/mediacentre/1598-port-of-hamburg-launches-new-hinterland-booking-platform.html>

Combined Transport support schemes: Brenner, France and Hungary

February 2020

Austria offers increased support to the organisers of RoLa services that remove trucks from the Brenner crossing. The French region of Côte d'Azur introduced incentives to revive the Rhône-Saône CT axis. The Hungarian government committed to developing a state aid scheme to assist the purchasing of craneable semi-trailers.

Link: <http://www.uirr.com/en/news/mediacentre/1551-rola-subsidies-on-the-brenner-route-have-been-increased-as-of-april.html>

- <http://www.uirr.com/en/news/mediacentre/1585-regional-support-for-combined-transport-in-france-.html>

Personnel News

KOMBIVERKEHR
 July 2020



Hermann Lanfer has succeeded **Gudrun Winner-Athens** as the Chair of Kombiverkehr's Board of Directors. Mr Lanfer has been a member of the Board since 2014. Ms Winner-Athens retired from the Board. The nine-strong Board of Directors includes **Dr. Sigrid Nikutta**, DB's Director for Freight Transport and CEO of DB Cargo AG, as well as **Mr Pierre Timmermans**, DB Cargo's Director of Sales, who doubles as the Vice-Chairman of Kombiverkehr.

We would like to express our gratitude to Ms Winner-Athens, who has offered her support and expertise during all these years. The UIRR community wishes her every success in the future.

VIIA
 June 2020



Charles Puech d'Alissac, the CEO of Naviland Cargo, has been appointed as the President of VIIA. His predecessor, Mr Thierry Le Guilloux took over another position within the SNCF group.

Members' News

ADRIA KOMBI
 June 2020

Introduction of electronic receipt of invoices and credit notes

Click: <https://adriakombi.si/news/article/36>

CFL MULTIMODAL
 June 2020

2019 Annual Report published

Click: <https://www.cfl-mm.lu/getattachment/421e5ad3-d48a-4c11-8244-ac5e7782605b/cfl-rapport-integre-2019-web-pdf.pdf>

EAST-WEST IL
 June 2020

Terminal opening counter launch

Click: <https://eastwestil.com/en/home/>

HUPAC
 June 2020

2019 Annual Report published

Click: <https://www.hupac.com/Annual-Report>

KOMBIVERKEHR
 June 2020

Rainer Mertel goes into retirement

Click: https://www.kombiverkehr.de/en/press/Press_Releases/A_career_devoted_to_Combined_Transport_Rainer_Mertel_goes_into_well-earned_retirement

METRANS
 June 2020

Steel coils transported in containers

Click: <https://metrans.eu/a-coil-efficient-solution/>

RALPIN
 June 2020

2019 closing of the business year

Click: <http://www.ralpin.com/appl/file.php?id=1257>

T3M
 April 2020

Combined Transport delivers against the coronavirus

Click: <https://www.t3m.fr/port-de-lille-t3m-livre-la-guerre-du-rail-contre-le-virus/>

Key Dates & Events

2 September 2020, online event	5 th UIRR - COMBINE Nordic Seminar
1-3 September 2020, Poznan	Rail Freight Summit
15 September 2020, Brussels	Rail Freight after COVID-19
24-25 September 2020, Helsinki	IBS Congress
12-13 October 2020, Brussels	Digital Transport Logistics Forum (DTLF) plenary
14-15 October 2020, Riga	Track Access Charge Summit
23 October 2020, Florence	19 th Florence Rail Forum
27 October 2020, online event	UIRR European Intermodal Summit
18 November 2020, online event	Digital Transport Days
18-19 November 2020, Gent	Rhine-Alpine Rail Freight Corridor Terminal Advisory Group Meeting
30 November – 2 December 2020, Prague	International Rail Freight Conference
10 December 2020, Vienna	Rail Freight Day Conference
25 January 2021, Brussels	European Railway Awards event

INTERNATIONAL UNION FOR ROAD-RAIL COMBINED TRANSPORT

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