UIRR Report

EUROPEAN ROAD-RAIL COMBINED TRANSPORT

2012-13

UIRR

INTERNATIONAL UNION
FOR ROAD-RAIL
COMBINED TRANSPORT

Table of Contents

IMPRESSUM

Publisher: UIRR s.c.r.l., Brussels, c/o Àkos Èrsek
Pictures: UIRR s.c.r.l. and member companies
Design: Tostaky s.a., Brussels

Printed in Belgium on chlorine-free paper.

The complete 2012-13 UIRR Report can be downloaded from www.uirr.com.

Key figures of Combined Transport

40 km/h

average speed of the new Ostrava-Verona service

The train covers the 1061km distance in 27 hours resulting in a scheduled average speed of 40km/h, which has been punctually achieved with a reliability of more than 90% in its first year of operation.

Bohemiakombi, together with Cemat and Kombiverkehr and with the collaboration of three private railway undertakings responsible for traction completed already more than 100 trains on this new relation Ostrava – Verona in 2012.

It is believed that journey time could be reduced to under 24hrs in the coming year, and even further in the years to come to achieve a 50km/h average speed with the same punctuality rates.

+15.030 units

or 5% rise in the number of semi-trailers shipped in 2012

UIRR Operators forwarded 5% more semi-trailers in 2012 compared to the year before, while the overall number of consignments carried in Unaccompanied Combined Transport declined by 9%.

This performance means that every seventh Unaccompanied Combined Transport consignment last year was a semi-trailer, typically transported in a pocket wagon over a distance of over 800km. The share of semi-trailer transport within total CT matched that of Rolling Motorways (RoMo) for the first time in history.

UIRR commissioned a study in 2012 to examine the competing transhipment techniques used in the shipping of semi-trailers by rail: vertical transhipment was found to have the lowest total system costs (see page 5 for more information).

+30 %

is the potential productivity gain achievable by enabling longer and heavier trains

In case – by completing the required investments – the maximum allowed train length and total weight is enabled to increase from 500m/1600t offering a P380 loading gauge to 750m/2000t with a P400 loading gauge along European Rail Freight Corridor 1 by 2019, then the productivity of CT trains will be boosted by at least 30% (equal to the permitted extra load capacity).

This demonstrates well the competitiveness potential of rail freight that can be unlocked by completing the necessary investments into rail infrastructure.

For more information visit www.corridor1.eu

2012: a difficult year

European Road-Rail Combined Transport shrunk due to a combination of factors – economic slowdown and rail infrastructure-related disturbances – by 11% in terms of consignments and 5% if counted in tonne-kilometres.

Whereas Unaccompanied Combined Transport fared relatively better at -9% in consignments and -4% in tonne-kilometre terms, Accompanied Combined Transport, or Rolling Motorways, suffered a loss of 24% in consignments and 19% in tonne-kilometres, making 2012 a "black year" in the history of European RoMo.

The average distance travelled by a CT consignment was 670km in 2012, which constitutes a nearly 5% increase when compared with a year earlier; 96% of CT consignments were forwarded on distances longer than 300km. The relatively shorter haul CT services declined disproportionately, while demand for the longer distance CT forwarding services held up better. Almost the same can be said of the average weight of a CT consignment, which grew by 5% compared to 2011.

2012 – in a nutshell – was **a year when fewer, but heavier consignments travelled on longer distances in European Road-Rail Combined Transport**. It must also be mentioned that in 2012 the performance of RoMo fell to a level last seen 8 years ago in 2005. The number of semi-trailers shipped in Unaccompanied CT, on the other hand, rose by 5% to a new historical high exceeding the number of RoMo consignments by 10 thousand units for the first time in history.

The State of Affairs

FROM THE CHAIRMAN AND THE DIRECTOR GENERAL

In the period 2010-2011, UIRR Operators managed to more than recover the Road-Rail Combined Transport (CT) volumes lost as a consequence of the global economic crisis. A second dip in economic activities in Europe, however, exacerbated by major infrastructure renewal works on the Brenner and Lötschberg corridors, two strategic Transalpine routes, and landslides on the parallel Gotthard corridor – each incident requiring for a complete line closure for weeks – altogether have resulted in a 11% reduction of European CT volume in 2012.

Industry background

Combined Transport Operators represented by the UIRR have effectively responded to the challenges posed by the continuous weakness of the European economy. Where necessary, UIRR Member Companies adjusted their service offering to the sluggish demand, though they remained keen to maintain a high service level for the European forwarding and logistics industry. In other cases, mergers of operators, affecting the cases of Cemat as well as ICA, or corporate restructurings following changes in the ownership of operators (Novatrans, Crokombi) were set to cut down administrative and operational costs and reinforce the competitiveness. Only in one case did shareholders resort to the ceasing of operations and the subsequent liquidation of a UIRR Member (Hungarokombi), largely attributable to the cancelling of state-support extended to Rolling Motorway services by the Hungarian government and the multiple-year delays in the introduction of distance-based electronic road tolling in that country.

Long-distance road haulage companies also had to struggle for assignments, which heavily impacted on freight market rates. Some European corridors suffered from a drop of international goods transport volumes and have even been seeing a ruinous price competition owing to overcapacities in road transport and the influence of low-price hauliers. UIRR operators reacted to the intensified competition by strict cost management and reinforced marketing efforts.

Sluggishly progressing railway reform in several Member States has contributed to the stagnation of rail service quality. The initial data collection under the recently restarted UIRR Quality Statistics Service shows no clear signs of improvement in the punctuality of freight trains. Competition in rail traction remains poor in several EU Member States, as alternatives for CT Operators to choose from are scarce and inadequate. The private capital influx into rail remains much lower than desirable. Investments by (state-owned) rail infrastructure managers – with a few exceptions – focus on passenger transport related improvements that offer, if any, only indirect benefits to freight operators.

Developments in the regulatory framework

The most promising development in the regulatory framework is the intensification of implementation work related to the Regulation on a European network for rail freight (913/2010/EC). Thanks to the collaboration of rail infrastructure managers under the close coordination of the European Commission, all nine corridor management entities have been set up with Advisory Groups that include Transhipment Terminal Managers. The coordination of investment programmes has begun, while the catalogues of pre-arranged train paths are being put together to be announced – mostly at no additional cost – in a one-stop-shop format from 2014. UIRR expects a leap in rail service quality once these cross-border corridors begin to have a bearing on daily operations.

The UIRR Combined Transport Sentiment Index turned "cautiously optimistic" for the first time in 15 months.

The internalisation of external costs of (freight) transport has seen little progress. While several EU Member States have implemented programmes and measures to reduce rail noise, very little or no progress could be recorded as concerns the reform of fuel excise taxes, which should be based on energy content and GHG emissions, as well as the introduction of mandatory distance-based electronic tolling, internalisation of road noise, congestion, accident related externalities and biodiversity destruction.

Those Member States that declared an intention to introduce e-tolling – under pressure to reduce fiscal deficits and to find a source to finance road infrastructure operations, maintenance and development expenses – have mostly postponed their implementation schedules. Simultaneously, track access charges were increased as state funds for rail infrastructure investments were curtailed. Few Member States committed to genuine multi-annual contracts with their rail infrastructure managers thus further eroding financing certainty.

UIRR has high expectations for improvements of the regulatory framework of the rail sector – enabling meaningful enhancement of railway competitiveness – from the implementation of the recast First Railway Package (the single European railway area Directive 2012/34), and as a result of adopting the Fourth Railway Package unveiled on 30 January 2013. On the other hand, concerns remain high for the reverse modal shift caused by the feared proliferation of the cross-border circulation of megatrucks in Europe following the reinterpretation of rules by the European Commission in June 2012, which was confirmed in the European Commission's proposed amendment of Directive 96/53/EC unveiled in April 2013.

Achievements of UIRR

UIRR has published ten position papers in the preceding year on the most relevant topics: amongst others they were referring to the institutional separation of railway undertakings, and the risks posed by the circulation of megatrucks. Further the UIRR has commissioned an evaluation study on new horizontal loading techniques for semi-trailers and published the UIRR Roadmap for Combined Transport 2050. The latter compiles the measures required to match the strategic modal shift aims set by the European Commission's White Paper on Transport in 2010.

Two projects co-financed by the EU were started with UIRR's active participation over 2012: EcoHubs, which aims to develop efficient, environmental-friendly terminals, and DESTINY that targets on the proliferation of standards and best practices in security, dangerous goods handling and load securing in Combined Transport. UIRR progressed the use of the ILU-Code designed to enhance the identification of European Intermodal Loading Units and enriched its services assisting loading units' owners by the introduction of a labelling service.

Outlook and expectations

The UIRR Combined Transport Sentiment Index turned "cautiously optimistic" for the first time in 15 months for the 12-month period starting 1 April 2013. This attests to confidence in a moderate recovery of CT volumes in the forthcoming months. UIRR will continue to professionally argue for the measures and framework deemed necessary to deliver the modal shift objectives, which are indispensable to ensure that long distance freight transport follows a sustainable path of development and thus contribute to the competitiveness of the European economy and to making Europe a better place to live.

Robert Breuhahn
Chairman

Martin Burkhardt
Director General

Unaccompanied Combined Transport

The traffic volume of Unaccompanied Combined Transport suffered a decline of 9% in number of consignments, but only 4% in tonne-kilometres during 2012. This performance means that all the recovery realised in 2011 has been wiped out by the second phase of the slowdown in economic activities.

UIRR's Unaccompanied Combined Transport (UCT) Operators carried altogether 2.4 million consignments in 2012, as compared to 2.65 million a year earlier. The total number of tonne-kilometres in 2012 amounted to 37.4 billion as compared with 38.8 billion a year earlier.

The business case

UCT entails the forwarding of cargo packed into semi-trailers, swap-bodies or containers (collectively: Intermodal Loading Units, or ILU) that are then forwarded using any possible combination of the different modes of transport. Among the various modes, road haulage is used to connect the consignment's point of origin to the most conveniently located (nearest) transhipment terminal, where the ILU is transferred for the longer distance segment of its journey to a train, an inland waterway vessel or a ship of coastal or deep-sea navigation. The ILU in the end is again carried by road haulage from the nearest terminal to its final destination.

The trains that carry most of the continental Combined Transport shipments on the long(er) part of their journeys may be organised as direct shuttles connecting two terminals or they may run into hub terminals to be reconfigured onto trains running towards a series of different destinations.

UCT is the most progressive form of Combined Transport since it allows the most efficient separation of the cargo from the vehicles that carry it, while the transfer from one mode to another may be efficiently carried out. The combination of modes of transport used to forward an ILU-based consignment means that clever transport planners may achieve the greatest possible energy efficiency in combination with the lowest possible GHG emissions for every transport assignment if opting for UCT.

Negative effects in 2012

The poor performance of 2012 emerged largely as a consequence of the dip in economic activities, causing sluggish demand for freight transporters in general.

CT Operators were struck by two other effects: aggressive pricing by road hauliers, which they were not capable of fully matching, and the complete closure of important Transalpine routes for several weeks each – one related to reconstruction works, while the other due to landslides that resulted in losses of valuable train paths.

Rail transport related costs – such as track access charges – have been steadily rising, while the prevailing price levels of long(er) distance freight transport remained under downward pressure from the dominant road haulage, which enjoyed a postponement of both toll increases and the introduction of distance-based tolling that many EU Member States announced as their intentions.

Interesting developments in figures

While the number of UCT consignments shrunk by 9%, the number of semi-trailers forwarded grew by 5% taking their share within UCT consignments to 24%. The average distance covered by an UCT consignment stood at 884km in 2012 (unchanged from a year earlier), which together with an increase in the average weight of a consignment resulted in a smaller reduction of 4% in tonne-kilometres. Subsequently we may conclude that UCT mostly suffered with retaining shorter distance consignments, while its competitiveness over longer distances prevailed. [For more statistics please see p.19-23.]

Unaccompanied Combined Transport retained its market share over longer distances, while struggled on shorter routes.

Study compares competing CT techniques

Three transhipment techniques, CargoBeamer and two variations of Modalohr (horizontal and UIC), were chosen for examination in the study that was published on 28 November 2012, which compared their respective system-level total costs to the "conventional" method based on vertical transhipment of semi-trailers.

Conducting the actual analysis on an 860km long route connecting Cologne and Milan, the study found UCT to have the most favourable performance when measured in overall system costs. Moreover, UCT emerged superior in every cost category examined in the study. The two Modalohr systems produced 30% higher overall system costs, while CargoBeamer turned out 40% more expensive.

See www.uirr.com for more information.

Initiatives of UCT Operators

Adjusting the service offering, while organising trains on new relations' competitive services, is at the forefront of the CT Operators' thinking.

UIRR Operators have made significant efforts to restructure their operations and achieve cost savings wherever possible. Investment in new wagons, IT systems, maintenance capabilities and terminal facilities continued despite the crisis.

Serious efforts were made to improve the conditions of traction services. Some Operators announced a competitive tender to cover their traction needs with the hope that more competitive offers would be received in both service level terms as well as in pricing.

Member's Comment

VLADIMIR FISER
Managing Director
Bohemiakombi

The 17% growth in traffic realised by Bohemiakombi in 2012 was attributable to a considerable extent to new products such as the direct train connection between Ostrava and Verona, launched in collaboration with Cemat and Kombiverkehr. The train covers the 1061 km distance in a scheduled time of 27 hours resulting in a very competitive average speed of 40km/h. The attractive average speed of the new service combined with very competitive punctuality performance is largely attributable to the effectiveness of the three private railway undertakings – AWT, Locomotion and RTC – which are the traction providers of the train.

The P400 profile gauge available in the entire extent of the new train is essential to enable the forwarding of the high portion of semi-trailers that travel in pocket wagons along the relation. The four different electricity systems to be encountered in Italy, Austria and the Czech Republic require several locomotive changes, which will only be omitted once the necessary multi-system locomotive becomes certified in the Czech Republic. The 540m maximum allowed train length – if extended in the future – promises yet further efficiency improvement potential. In an ideal case, a scheduled journey time of well under 24 hours should be possible in the not too distant future.

Accompanied
Combined Transport

2012 will enter the history books of Rolling Motorways, or Accompanied Combined Transport, as a "black year": never before – during the over 40-year history of this unique mode of Combined Transport – did Rolling Motorway (RoMo) traffic contract by 24% in number of consignments and 19% in tonne-kilometres over a 12-month period.

UIRR's RoMo Operators helped to shift almost 324 thousand trucks off European roads, mainly on Transalpine routes involving Switzerland and Austria in 2012 whereas a year earlier the same figure stood at 429 thousand. The contraction in tonne-kilometres was somewhat more favourable at 3.3 billion tkm as compared to 4.2 billion tkm a year earlier, since the loss of business on short-distance routes exceeded that on longer routes.

The business case

RoMo transport provides a vital service useful to long(er) distance hauliers in three cases:

I. When road hauliers of a non-EU country have a limited number of permits granted to them for circulation in the European Union and would nonetheless like to proceed into Europe.

II. In instances of crossing a geographical obstacle, such as the Alps, where the achievable average speed is slowed by steep climbs and truckers are forced to pay a substantial road toll.

III. If a road haulier has to urgently fulfil his assignment and wishes to progress even at times of driving bans (weekend and holiday), or during the compulsory rest periods of drivers.

Negative effects in 2012

A unique combination of negative effects impacted simultaneously to produce the poor RoMo result in 2012:

- Reduced economic output (production) meant lower demand for freight transport and a low capacity utilisation of long(er) distance road hauliers meant that truckers were motivated to drive as much as possible and avoid using higher value services such as RoMo.
- Significant train path shortages on Transalpine rail crossings of Brenner – due to a major reconstruction – and Gotthard – due to a landslide – in the summer resulted in a one-off loss of capacity.
- After some years of profitless operation, the shareholders of Hungarokombi decided to stop the activities of the company and dissolve it – effectively eliminating RoMo services in Hungary (the Szeged-Wels relation). Reasons include (i) the dramatically reduced interest from Romanian and Bulgarian road hauliers, whose circulation in Europe – after their countries joined the EU – is no longer limited by permit constraints; (ii) the increasing track access charges and other railway costs in Hungary, while the state has stopped its RoMo subsidy programme in 2010 and (iii) the delays experienced in the introduction of the distance-based eTolling in the country.
- Ökombi, the largest European RoMo Operator, had to substantially reorganise its activities in light of the Austrian government diverting subsidies previously available to Combined Transport towards the single wagonload business.

Interesting developments in figures

The average distance covered by a RoMo consignment grew from 295km in 2011 to 316km in 2012 or by about 7% as a consequence of a disproportionate drop in shorter distance domestic RoMo traffic. The increase in distance coupled with an unchanged average weight per consignment resulted in the smaller reduction of tonne-kilometres amounting to 19% during the past year. 2012 was a "black year" in the history of European Rolling Motorway services with traffic falling back to levels last experienced 8 years ago in 2005. [For more statistics please see P.19-23.]

Rolling Motorways shifted 324,000 trucks off European roads, mainly on Transalpine routes.

Developer of RoMo wagon wins 2013 European Technical Award

The 2013 European Technical Railway Award was presented to Dr Johannes Nicolin, Technical Director of AAE Holding AG.

Dr Nicolin worked as Director of Engineering for freight wagons and bogies at Waggonfabrik Talbot (in Aachen) at the time for development of the intermodal freight wagons used in Rolling Motorway transport today in Europe. His innovations helped to reduce maintenance costs and enhance handling efficiency.

The Technical Committee of INTERUNIT, the collaborative working body of CT stakeholders, counts Dr Nicolin among its most active and highly valued members.

Initiatives of RoMo Operators

Significant efforts are being exerted by Operators to streamline their operations and reduce their costs at the same time in order to remain competitive in a very challenging business environment. Initiatives include the insourcing of the maintenance work related to the special small diameter wheelsets of RoMo wagons and a search for ever more competitive rail traction services, as well as improved quality train paths offering higher average speed and greater punctuality.

An extension to the maximum allowed train length along RoMo routes cause a significant increase in efficiency: if allowed to increase the typical train consisting of 25 wagons today by only 3 additional wagons, RoMo operators could realise a productivity gain in excess of 10%.

Member's Comment

RENÉ DANCET
Managing Director
RAlpin

The Swiss RoMo Operator RAlpin, founded in 2001, suffered in 2012 a reduction in traffic by 8% in terms of both consignments and tonne-kilometres due to natural disasters and infrastructural constrains. Nevertheless the utilized capacity is still on a high level of 85%. RAlpin provided in 2012 a stable contribution to modal shift, a prime aim of Swiss transport policy, by carrying 96 thousand HGVs in 2012 and in excess of 900 thousand HGVs since its founding.

The reliability of RAlpin's services will likely be improved. The 6,000 wheelsets produced in RAlpin's own workshop in a year allows not only the timely and efficient performance of the most important maintenance function but will likely result in a 10% cost saving on this activity.

The Federal Transport Authority of Switzerland and RAlpin concluded a framework contract to conduct Swiss RoMo services until 2018, which enables adequately long-term planning for the company. The opening of the Gotthard Base Tunnel and the upgrades on the lines leading to it during the following years will create additional business opportunities to launch new RoMo services.

Transhipment Terminals

Transhipment Terminals are the interfaces connecting the various modes of transport that collaborate to forward the cargo loaded into the intermodal loading units used in Combined Transport. UIRR Members operated 27 terminals at the end of 2012 (for more information please see p.28), while the UIRR Terminal Database contained 347 terminals in total for Europe. Any of the 23.7 million BIC-Code bearing ISO containers used in intercontinental maritime shipping and the about 630,000 European loading units circulating within the continent may turn up at these terminals for transhipment between a truck and a wagon or inland navigation vessel.

Ownership, development and operations

Several entities may own and operate CT Terminals, including rail infrastructure managers, CT Operators, port authorities, dedicated terminal management companies, logistics service providers. While terminal development is frequently financed by public resources, private capital is also used in several instances. In case public support is used when developing a terminal, it must be operated as an "open access terminal" (for details see text box). A concession for the management of terminals may occasionally be tendered out to professional terminal management entities.

Open Access Terminal

Every Transhipment Terminal that is developed using EU or other form of public financing should function as an Open Access Terminal (OAT). While the term "Open Access Terminal" is regularly used, it is not defined in European law; stakeholders presently rely on guidelines developed by the German National Regulatory Body (Bundesnetzagentur) about what conditions should be met by an OAT.

Accordingly, an OAT should make its facilities available for use by any CT Operator in line with Conditions of Use announced in writing and applied in a fair, discrimination-free way to every user by the terminal managing entity. The Conditions of Use shall describe the process of capacity allocation at the terminal, as well as the prices of use and discounts, if any, offered. Dispute settlement mechanisms must also be transparently declared.

Technologies used in Terminals

The location, availability and service level of Transhipment Terminals greatly influences the attractiveness of Combined Transport. The length of rail tracks, the transhipment technologies used, the road approach and the proximity of the railway (mainline) network are all determining factors of Terminal competitiveness alongside the on-site systems used for registration and administration as well as ensuring safety and security.

Any of the 23.7 million ISO containers used in maritime shipping and the 630,000 European loading units circulating within the continent may turn up at these terminals.

Role of Terminals

The EU Regulation 913/2010 about rail freight corridors is focused around providing connections (prearranged train paths) along the nine most important routes of long distance European freight flows between "freight terminals", which besides others include CT Transhipment Terminals. UIRR became a declared representative of Transhipment Terminal Managers by decision of its Extraordinary General Assembly held in December 2012. Subsequently, UIRR was invited by the European Commission to attend the conference that brings together the European Rail Freight Corridor Management Entities. Considering that 88% of European Combined Transport consignments crossed at least one European border in 2012, meaning that the train which transported it operated on the different railway networks of at least two countries, it is imperative that the considerations of CT Operators and Terminal Managers are equally articulated in such an important regular gathering.

Member's Comment

PETER PLEWA
Managing Director
Polzug

Polzug started managing its first terminal in Poland in 1993, which was a rented terminal offering 300m-long tracks. Since then the company has been undertaking the operation of a total of four terminals, including the most recently developed Hub Terminal in Poznan featuring 600m-long tracks. Loading units travelling from Polzug terminals in Pruszków, Wroclaw and Dąbrowa Górnicza, as well as from Warsaw, Łódź and Gdynia are efficiently rearranged at the Poznan facility into 600m-long shuttle trains that travel rapidly and efficiently – under cooperation with other CT partners – to their final destinations throughout Europe.

The mission of Polzug, which is owned by the Hamburger Hafen und Logistik AG (HHLA), is to provide competitive Combined Transport from anywhere in Poland to the deep sea ports of Northwest Europe. The company's premium product is the Hamburg-Poznan shuttle train, which completes its 570km-long journey today in 12 hours (translating to a nearly 50km/h average speed). Polzug is presently tendering its rail traction procurement contract, by which it hopes to obtain more competitive railway services ultimately enabling a reduction of journey time on this relation to 10 or even 8 hours.

Polzug aims to continue offering attractive Combined Transport services throughout Poland by the development and operation of terminals organised according to the hub-and-spoke system into an efficient network. Every terminal managed by Polzug operates as an open access terminal, offering services to any CT Operator.

The European business environment

Realising the challenge posed by the need to deliver explanations to their electorates on relatively complex matters of transport policy, and the need to change the framework conditions, politicians and governments in most Member States have shied away from fulfilling ambitious promises made at the peak of the crisis: delivery on pledges made to introduce distance-based electronic tolling, a European-level reform of fuel excise taxation or even plans to enhance road traffic rule enforcement have been slowed down, or even outright dropped. This – obviously – did not advance the cause of rebalancing the regulatory environment towards fairness among the different modes of transport. On the positive side improvements in the railway sector continued, which promises improvements to CT Operators, albeit only in the medium to long-term. The positive effects may be curtailed by the focus of resources to rail passenger transport, the extent of which cannot be easily assessed.

+ Implementation of the provisions of the rail freight corridor Regulation [913/2010] has reached a new phase with the intensity of activities picking up in a promising way: corridor managing entities have been set up, advisory groups – that include terminal managers – established, investment plan coordinating mechanisms put in place, and work on the catalogue of prearranged train paths advanced. This should considerably ease the flow of cross-border rail freight traffic, which is the main form of rail transport used by European CT Operators; the first operational results are expected to be felt from 2014-15 onwards.

+ Major reconstruction work on the important transalpine line through the Brenner Pass has been completed resulting in an increased train path capacity, which largely affects freight trains that are the dominant users of the route. The next major positive transalpine development is expected in 2019, when the Gotthard Base Tunnel will begin operations.

+ The €32 billion transport leg of the Connecting Europe Facility, devised by the European Commission, is expected to trigger the roughly €500 billion in essential rail infrastructure investment needed to realise a single European rail network that includes up to €250 billion foreseen for the removal of bottlenecks and completing missing links. Concerns remain ahead of the adoption of the EU's seven year budget (2013-2020) for the promised funds to be fully granted by the European legislator. The hopes of rail freight users, like CT Operators, are high that a fair portion of this investment is used to improve the network from their perspective, such as improving port connections, extension of gauge profile on several key lines, investments to enable the running of 750m long (or longer) trains with a gross weight of at least 2000t.

+ The attitude of railways seems to be changing as they have consented to the recommencement of UIRR's quality statistics reporting; data should be expected from 2013. The Recast of the First Railway Package (Directive 2012/34) also prescribes a substantial upgrade to the EC's rail sector monitoring scheme, which should improve transparency and thus lead to enhanced benchmarking and improved performance.

- The European Commission has issued a reversal of a 16-year-old interpretation of Directive 1996/53 on allowing experimental cross-border operation of megatrucks. Studies by TIM Consult (2007: www.uirr.com/en/media-centre/press-releases-and-position-papers/2006/mediacentre/17-study-on-longer-and-heavier-road-vehicles-gigaliner.html) and by Kessel & Partners and the Fraunhofer Institute (2012: www.uirr.com/en/media-centre/leaflet-and-studies/mediacentre/480-study-on-the-effects-of-the-introduction-of-lhvs-on-combined-transport.html) have found that the proliferation of megatrucks in Europe would result in reverse modal shift [from rail back to road].

Challenges and Outlook

The future of Road-Rail Combined Transport is built on the deep confidence in the technological superiority of this particular system of organising long-distance freight transport. Whether it is measured in energy efficiency, GHG emissions, safety, security, labour productivity, weather resilience, total system cost or total social cost, Combined Transport offers the most favourable conditions to shippers: 30% less energy, 75% fewer GHG emissions and 20-times fewer accidents per tonne-kilometre. The prevailing, relatively modest market share of CT in longer distance continental freight transport within Europe – in UIRR's opinion – reflects a regulatory imperfection, or a consequence of one. The main challenge facing UIRR and the entire sector is to achieve the realignment of the regulatory framework of transport necessary to create the fair conditions under which this technological supremacy may be reflected in market prices, and subsequently in a market share that is several times what it is today.

The challenges of CT

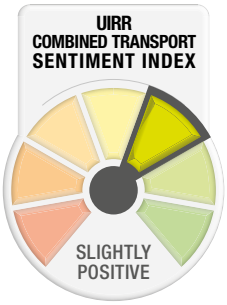
Handling of the fluctuating demand for freight transport experienced since the crisis erupted in 2008 poses the greatest immediate challenge to CT Operators and Terminal Managers. An unprecedented drop in 2009 was followed by two years of recovery only to be succeeded by again a year of contraction in 2012. The ability of stakeholders to react is curtailed by the technical limitations of the rail sector. Demand management problems are exacerbated by freight transport market rate fluctuations that are driven by road hauliers, which fight for consignments by occasionally pushing their prices to below cost levels, and train traffic disturbances caused by infrastructure maintenance works and congestion to a lesser extent.

The means of CT Operators

Combined Transport is organised by private entities that operate under the prevailing regulatory and market circumstances; the European CT market is not dominated by any player. The only means through which CT Operators can react to challenges are market-based, such as:

- **Introducing new services** (trains) that better cater to shippers' needs and follow the developments of rail infrastructure;
- **Enhancing competitiveness** through improved service quality, application of new technologies, streamlining business practices, and reducing costs;
- **Identifying clever investments** that boost capabilities;
- **Promoting of Road-Rail Combined Transport** towards decision-makers to inform them of the potential of this innovative system of freight transport and to achieve their support for the necessary corrections of the regulatory framework conditions leading in a fairer direction.

Outlook



After consistent negative quotes, the UIRR CT Sentiment Index turned **slightly positive** for the first time in April 2013 – covering the 12-month period ahead. CT Operators do not expect the major maintenance-related rail traffic disturbances of 2012 to reoccur in the foreseeable future; moreover, much awaited improvements in the longer term [i.e. the Gotthard Base Tunnel expected in 2019]. Besides CT Actors' continuous efforts to introduce new services and to reduce costs, only stricter enforcement of road traffic rules – as contained in the recently unveiled proposal of the European Commission to amend Directive 96/53/EC – alongside regulatory changes prescribing mandatory usage-based road tolling and the internalisation of road externalities can create fair and equal conditions. Finally, one can only have hopes about an upturn in the economy and manufacturing output.

Members' News

ADRIA KOMBI The Slovenian operator saw an increase in traffic during 2012 by 11 % in tkm and 13% in the number of consignments. Adria Kombi introduced a new IT system used in operations.

ALPE ADRIA The Italian operator focused on the Port of Trieste experienced a 1% growth in tonne-kilometres while handling the same number of consignments in 2012 as compared to a year earlier.

BOHEMIAKOMBI The Czech operator's traffic grew in 2012 by 17 % in the number of consignments.

CEMAT The major Italian operator suffered a 2% decline in tkm, while handling 9% more consignments following a merger with domestically focused operator Italcontainer in 2012. Cemat launched a project Green Vision to enhance its environmental performance.

COMBIBERIA The Spanish CT operator suffered a 1% decline in traffic as well as in the number of consignments handled in 2012.

CROKOMBI The CT operator of Croatia focused on the Port of Rijeka realised a near doubling of its performance in 2012. The company changed owners, which is viewed as bringing new impetus to its development.

HUNGAROKOMBI Following a disappointing year in 2012, as well as poor perspectives going forward, the owners of the Rolling Motorway operator of Hungary decided to shut down the company, completely ceasing its activities as of 9 December 2012.

HUPAC Europe's second largest, Switzerland-based CT Operator experienced an 8% contraction in 2012. While overall demand shrunk due to the economic crisis, Hupac suffered operational difficulties on several of its transalpine routes during the year. The company, which holds an ECM (Entity in Charge of Maintenance) certification, opened its own wagon workshop to enhance the efficiency of its rolling stock maintenance activities.

INTERFERRYBOATS (IFB) The Belgian CT operator – which celebrated the 90th anniversary of its founding in 2012 - experienced a dramatic drop in consignments, attributable to the collapse of its short-haul domestic business, while traffic contraction was significantly more moderate in terms of tonne-kilometres. Uncertainty over IFB's main shareholder and the general operating environment in Belgium exacerbated the poor market conditions facing the company.

KOMBIVERKEHR The largest CT operator of Europe – based in Frankfurt, Germany – experienced a stabile year of 1% growth in 2012 on both its domestic network and the company's border crossing relations encompassing the entire continent and in spite of being negatively impacted by serious disturbances on key transalpine railway routes.

NAVILAND CARGO The French CT operator specialised in providing hinterland port services in France has suffered a loss of 19% in terms of consignments and 13% reduction in tonne-kilometres due to the uncertain economic situation in Europe. Naviland was particularly active to extend its services to the Port of Antwerp and substantially streamlined its terminal activities; the company handles all of its traction services by own locomotives.

NOVATRANS The dominant French CT operator handled 13% fewer consignments in 2012, but achieved a 6% growth in traffic performance when counted in tonne-kilometres. Despite the ownership change of the company, it managed to implement a new booking interface last year. New senior management was appointed in April 2013.

ÖKOMBI Europe's leading Rolling Motorway operator, based in Austria, was particularly affected by the substantial rail infrastructure disturbances over its strategic transalpine relations, and has thereby suffered a considerable loss of about 30% in traffic performance during 2012. A significant restructuring is being undertaken as a consequence, which will result of the company's merger with its sole shareholder, Rail Cargo Austria, foreseen in mid-2013.

POLZUG The operator of CT trains and transhipment terminals specialised in serving Poland achieved a 31% growth in tonne-kilometres, while handling only marginally more consignments in 2012.

RALPIN The Swiss Rolling Motorway operator experienced an 8% contraction in 2012 largely attributable to the infrastructure disturbances on the transalpine railway lines in 2012. The ECM certified company has opened its own wheel maintenance shop with which RAlpin took its most sensitive maintenance works under its own control.

ROCOMBI Romania's CT operator nearly tripled its performance in 2012 as compared with a year earlier, albeit achieved from a relatively modest base performance.

UIRR's year in brief

2012 was a year of significant changes including the retirement of Chairman Mr Rudy Colle, the emblematic figure who led the organisation for 22 years. Mr Martin Burkhardt became sole Director General of the UIRR following the election of a new Board of Directors, which also appointed Mr Robert Breuhahn as new Chairman, in July. A new corporate identity was adopted in December alongside the wide-reaching position paper titled: UIRR CT Roadmap 2050.

Publications

UIRR issued 9 press releases, published 4 newsletters and a major study on the comparison of various CT techniques in 2012. The topics covered reflected the legislative agenda of the European Union on transport including railway reform, the dangers posed towards sustainable modes of transport by megatrucks, the general problem of weights and dimensions of road vehicles and a potential recast of the Modernised Customs Code.

The outreach of the organisation whose mission is the promotion of Road-Rail Combined Transport was attested to by the 18% increase in the number of visitors to its website and the near doubling of data performance. As part of its web 2.0 dissemination strategy, UIRR launched a professional group on LinkedIn titled "UIRR for Road-Rail Combined Transport".

Legislative topics of 2012

UIRR worked on rail-sector-related issues (recast of the First Railway Package, the Fourth Railway Package, the Rail Market Monitoring Scheme, the implementation of European Rail Freight Corridors), road transport topics (aerodynamic elements, weights and dimensions of road vehicles, proliferation of megatrucks), as well as general transport topics such as the revision of energy taxation and the Modernised Customs Code. Standardisation work ongoing at the European Railway Agency, as well as the implementation activities related to it were also followed up by UIRR.

Participations

UIRR staff spoke in representation of CT at several events and during one-on-one meetings. The event "An Afternoon with Combined Transport" was organised in conjunction with the Combinant Terminal of Antwerp in September 2012 for European Commission officials to familiarise with issues of Transhipment Terminals and CT traffic.

UIRR is a registered In-House Lobbyist and Trade Association with the European Parliament and the Commission (Transparency Register no. 49307536642-11), as well as a recognised representative of CT Operators and Transhipment Terminal Managers at the European Railway Agency, CEN, Eurostat, the European Council, UN/ECE, ECD/ITF, the Rail Market Monitoring Scheme, the SERIC Conference of Rail Freight Corridors and UIC. UIRR's delegate, Director General Mr Martin Burkhardt was appointed as member of the board of the European Railway Agency as a representative of rail freight customers.

UIRR is the recognised representative of Combined Transport Operators and Transhipment Terminal Managers.

Facilitating professional exchange

UIRR organises the professional exchanges of its members under three thematic committees. The subjects addressed in these committees are also discussed with the intermodal specialists of traction service providing railway undertakings under INTERUNIT, which is collectively coordinated by UIC and UIRR.

- **Technical Committee** topics: TSI Wagon, European registers, ECM guidelines, GCU contract, UIC leaflets, codification and labelling, development of wagons and transhipment technologies.
- **Operations Committee** topics: rail freight corridor Regulation, longer and heavier trains, punctuality issues and quality monitoring, E-Railfreight project (to develop paperless CT).
- **Dangerous Goods Committee**: ADR/RID and national legislations, statistics, data exchange, dissemination materials.

Projects to help enhance CT

DESTINY is a Marco Polo common learning project initiated and coordinated by UIRR to improve the efficiency of intermodal transport chains through the proliferation of standards and industry best practice in load securing, dangerous goods handling and the marking and identification of loading units. The project enjoys the active support of a wide range of industry stakeholders and promises to deliver practical solutions to enhance the competitiveness of Road-Rail Combined Transport. [www.destiny-project.eu]

EcoHubs, a project that runs with UIRR's active participation, provides models for cooperation and communication between multimodal terminal network stakeholders, amplifying, thus, their joint capabilities. It also establishes Common Value Added Services which, combined with existing services, facilitate end-to-end co-modal, low-CO_2 transport solutions that maximise utilisation of terminal and logistics resources and ultimately transform multimodal terminals into Green Hubs. [www.ecohubs.eu]

UIRR also contributed in an advisory capacity to the **VEL-Wagon** and **Tiger** projects which aimed respectively at developing an optimised new unaccompanied CT wagon and presenting demonstrations of four solutions proposed to develop rail freight as part of co-modal transport chains.

Supporting daily CT operations

UIRR provided vital contributions when participating in UIC's TAF, wagon noise and CT leaflet revision working groups. The work done at UIC directly impacts the daily operations of rail freight, similarly to the regularly updated map of railway lines for Combined Transport, which UIRR also helps to compile.

The IT-related services of UIRR, such as the terminal and customer database or the UIRR data-message format, are daily inputs of CT operations alongside the UIRR General Terms and Conditions applied by European CT stakeholders well in excess of UIRR membership.

The 2012 Report on Combined Transport in Europe was published in 2013 by the UIC and its Combined Transport Group. The UIRR was involved in the production of this report. More information on www.uirr.com.

UIRR's permanent team

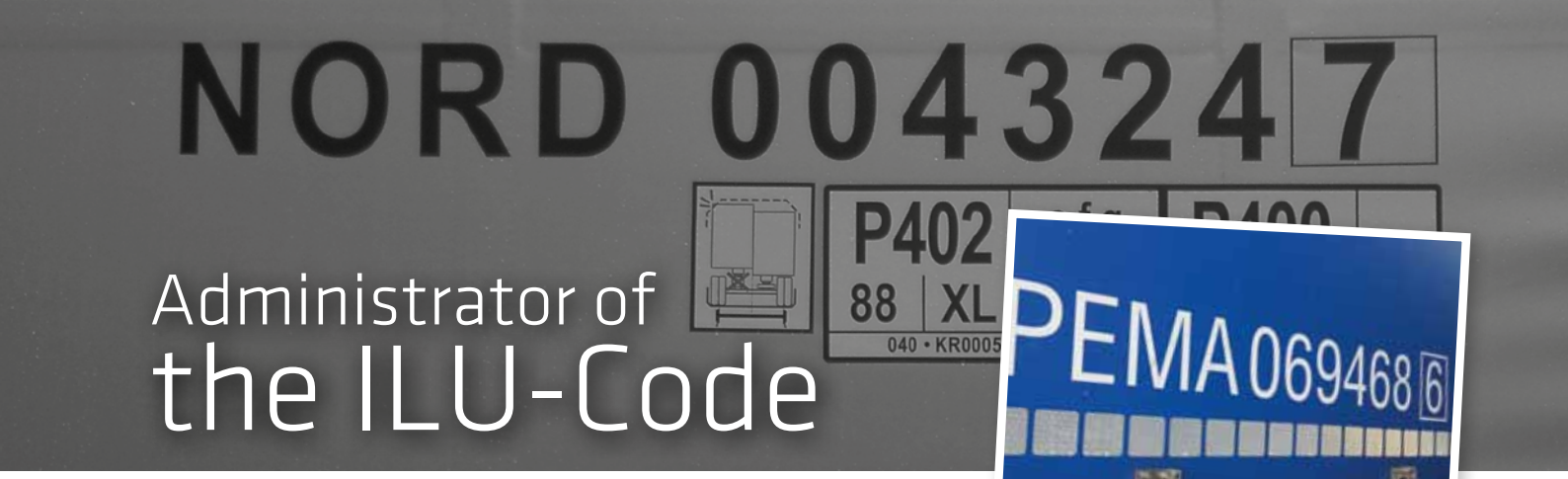
Martin BURKHARDT

Ákos ÉRSEK

Barbara BENTO

Eric FEYEN

Pekiye BIÇICI



Administrator of the ILU-Code

The EN13044 standard on the marking of intermodal loading units nominated UIRR as the Administrator of the ILU-Code, which is a new identifier similar to the world renowned BIC-Code to be used on semi-trailers and swap-bodies that circulate in European Combined Transport. Registration of loading unit owners has progressed in the 18 months that passed since the ILU-Code became available.

More than 260 logistics companies from 18 European countries have already registered an owner code of their choice. Some of them, including large companies with many thousands of loading units, have already finished marking their swap-bodies and semi-trailers.

UIRR has started together with 8 project partners and 15 supporting international organisations from all modes of transport an exhaustive information campaign (within the EU-supported project DESTINY) to make all stakeholders aware of the deadline of 1 July 2014, up to which all loading units must be marked with an ILU-Code or BIC-Code in case of maritime containers.

How to proceed?

Registering Owner-keys

On the website www.ilu-code.eu, logistics companies should register and choose an Owner-key. Upon payment of the registration fee the code is registered and officially published in the ILU-Code Register.

Marking loading-units

The owners of loading units should mark all their European loading units with their Owner-key, followed by a freely chosen registration number. A tool on the ILU-Code website enables them to calculate the check-digit. Newly purchased loading units will normally be marked by the manufacturer on request of the owner. For existing loading units the logistics companies should organsie the marking themselves.

Labelling service

Recognising that ILU-Code registrants encountered difficulties to obtain the labels compliant with EN13044 marking rules, UIRR launched a labelling service – accessible on the www.ilu-code.eu website – from where the required labels (stickers) may be easily and efficiently ordered. Labels applicable onto tarpaulins as well as for hard surfaces can both be found there.

Advantages of the ILU-Code

ILU-Code
identification of Intermodal Loading Units in Europe

- Every actor of the intermodal transport chain (railway undertakings, customs, terminal and port managers, etc.) can easily trace the owner of a loading unit through the Internet-based Register and also by smartphone.
- Owners receive reliable tracking and tracing information. No more expensive and time consuming search for "lost" units due to inaccurate data transmission.
- The check-digit reveals 95% of data entry errors. It relieves the burden of most corrections due to inaccurate transport documents and invoices.
- The software used to process the BIC-Code for maritime containers is suitable for the technically compatible ILU-Code.
- The ILU- or BIC-Codes are suitable for optical character recognition (OCR). ILU-Code equipped loading units can rapidly be processed at terminals, ports and by big shippers.
- Quick and easy compliance with high-level security requirements at ports and EU external borders, allowing customs and official authorities to identify the owner any time; access to "priority/fast lanes".
- No need for a new codification with additional costs when selling or purchasing used loading units.
- No more confusion as the codification numbers and the vehicle's license number are not used in parallel to the owner identification anymore.

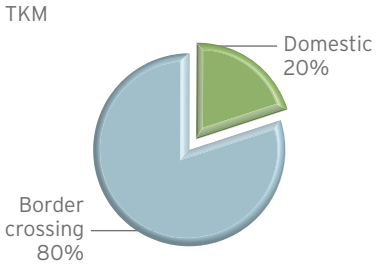
Statistics

Overview 2012

	Border Crossing			Domestic			Total		
	2011*	2012	% 12-11	2011*	2012	% 12-11	2011*	2012	% 12-11
Unaccompanied									
Consignments	1,563,570	1,484,996	-5%	1,085,915	916,089	-16%	2,649,485	2,401,085	-9%
container	1,306,344	1,206,652	-8%	1,024,574	860,836	-16%	2,330,918	2,067,488	-11%
semi-trailers	257,226	278,344	8%	61,341	55,253	-10%	318,567	333,597	5%
TEU	3,127,140	2,969,992	-5%	2,171,830	1,832,178	-16%	5,298,970	4,802,170	-9%
mln TKM	30,776	29,503	-4%	8,000	7,891	-1%	38,776	37,394	-4%
Accompanied									
Consignments	277,170	222,306	-20%	149,153	101,404	-32%	426,323	323,710	-24%
TEU	554,340	444,612	-20%	298,306	202,808	-32%	896,504	647,420	-24%
mln TKM	3,623	2,997	-17%	594	411	-31%	4,217	3,407	-19%
TOTAL									
Consignments	**1,840,740**	**1,707,302**	**-7%**	**1,235,068**	**1,017,493**	**-18%**	**3,075,808**	**2,724,795**	**-11%**
TEU	**3,681,480**	**3,414,604**	**-7%**	**2,470,136**	**2,034,986**	**-18%**	**6,151,616**	**5,449,590**	**-11%**
mln TKM	**34,399**	**32,500**	**-6%**	**8,594**	**8,301**	**-3%**	**42,993**	**40,801**	**-5%**

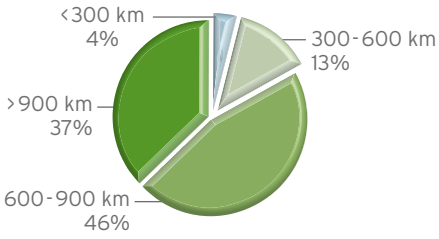
* Unaccompanied traffic without ICA (merged end of 2011 into RCA wich is not a UIRR member)

Traffic performance



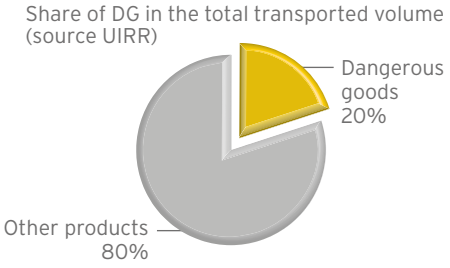
80% of CT tonne-kilometres were realised while using the rail network of more than one rail infrastructure manager (Member State), as border crossing traffic dominated the assignments of CT Operators in 2012.

Distance matrix



96% of European Combined transport took place over distances of 300km or more, and 83% on distances longer than 600km in 2012. The average distance covered by a CT consignment stood at nearly 800km.

Dangerous Goods



One fifth of European Combined Transport consignments contained in 2012 dangerous goods products, attesting the importance to develop CT solutions custom tailored to the specific needs of the chemical sector.

General Considerations

A UIRR consignment corresponds to the transport capacity of one lorry on the road (equivalent to 2.0 TEU), meaning:

- one semi-trailer;
- two swap-bodies less than 8.30 m and under 16t;
- one swap-body more than 8.30 m or over 16t;
- one vehicle on the Rolling Motorway.

The UIRR statistics include only the rail section of the Road-Rail Combined Transport chain (terminal to terminal).

Symbols and Units

- C Consignments
- CT Container
- RoMo Rolling Motorway
- SB Swap-body
- ST Semi-trailer
- t Tonnes
- TEU Twenty-foot Equivalent Unit
- tkm Tonne-kilometre

Evolution of Unaccompanied and Accompanied Traffic

1990 - 2012

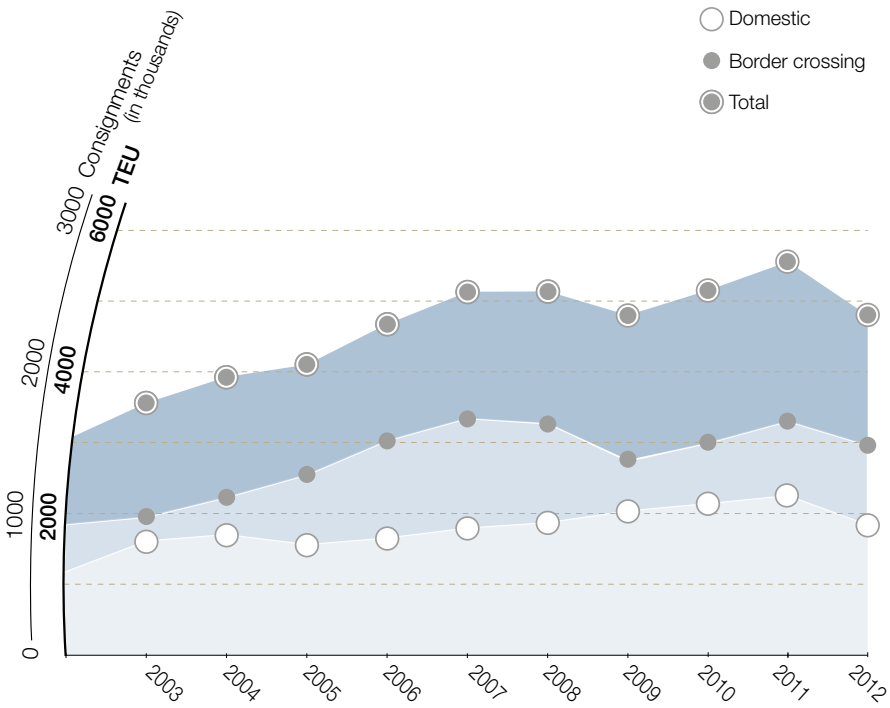
UNACCOMPANIED TRAFFIC (domestic + border crossing)					
	1990*	1995*	2000	2005	2006
Number of consignments	969,091	1,303,008	1,506,653	2,141,899	2,335,776
Total 1000 TKM	19,500,000	21,000,000	25,941,613	32,657,794	41,103,686
< 300 km	0%	2%	2%	1%	1%
300 km - 600 km	20%	35%	20%	16%	12%
600 km - 900 km	55%	35%	38%	51%	25%
> 900 km	25%	40%	37%	32%	62%

ROLLING MOTORWAY TRAFFIC (domestic + border crossing)					
	1990*	1995*	2000	2005	2006
Number of consignments	214,270	312,356	460,420	315,680	381,975
Total TKM	2,500,000	3,000,000	4,201,104	4,299,198	4,271,293
< 300 km	10%	10%	37%	9%	14%
300 km - 600 km	45%	45%	21%	45%	59%
600 km - 900 km	45%	45%	42%	46%	27%
> 900 km	0%	0%	0%	0%	0%

* TKM figures based on estimations and assumptions

The unaccompanied product

The fluctuation in traffic levels experienced in the last five years – starting in 2008 – presents a major challenge especially when considering the long life-cycles of Combined Transport technologies (wagons, cranes, etc.). Due to considerable fixed costs of rail operations reaching a high capacity utilisation is a challenge for CT operators.

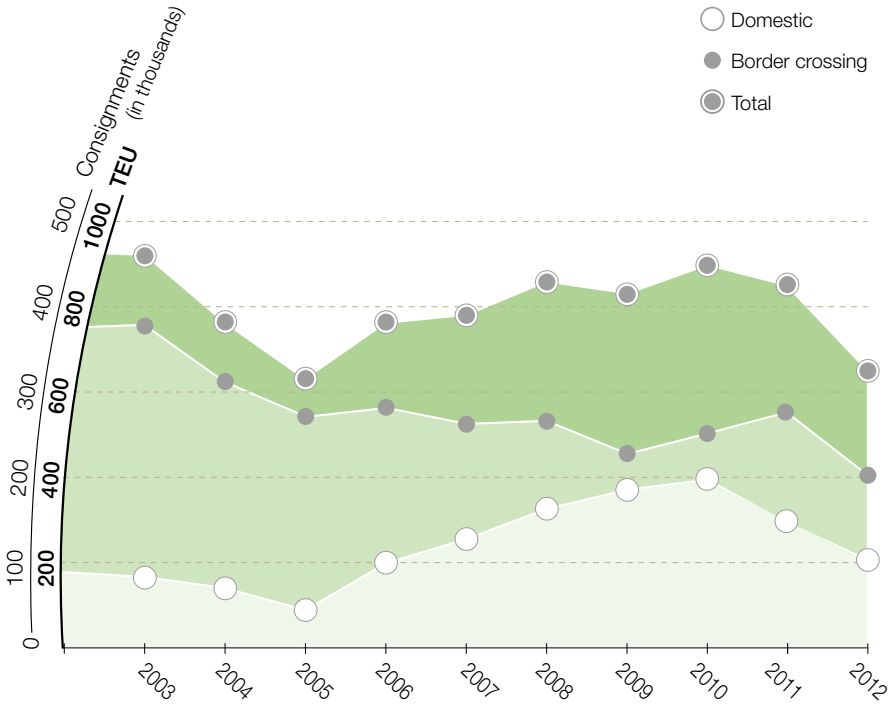


2007	2008	2009	2010	2011	2012	2012/2011
2,562,663	2,565,681	2,402,369	2,641,345	2,650,672	2,401,085	-9%
42,495,690	41,971,291	35,133,087	38,229,029	38,776,539	37,393,921	-4%
1%	1%	2%	2%	6%	4%	↓
11%	13%	11%	12%	12%	13%	↑
44%	37%	38%	46%	44%	46%	↑
45%	49%	48%	41%	37%	37%	=

2007	2008	2009	2010	2011	2012	2012/2011
389,883	428,945	415,980	448,252	426,323	323,710	-24%
3,573,367	4,000,439	3,765,585	4,137,865	4,216,524	3,407,169	-19%
23%	23%	28%	28%	26%	18%	↓
61%	59%	59%	58%	60%	68%	↑
16%	18%	13%	14%	14%	14%	=
0%	0%	0%	0%	0%	0%	=

The accompanied product

Rolling Motorway (RoMo) traffic dropped to the level last experienced in 2005, immediately after the enlargement of the European Union. RoMo Operators are hopeful in a rebound from 2013 as the major rail infrastructure disturbances of the past year will likely not reoccur.



Country Matrix

Relations from	Relations to	Consign-ments	Consign-ments-km	Average Distance	Average Weight	Gross Weight	Tonnes-km	Techniques, % consignments			
Country		C	S*km		t/C	t	1.000 tkm	ST	SB/CT <8,30m	SB/CT >8,30m	RoMo
		1	2	3=2/1	4=5/1	5	6=2*4	7	8	9	10
AT	BE	706	817,103	1,158	22	15,447	17,891		3%	97%	
BE	AT	1,202	1,357,613	1,129	27	32,443	36,644		1%	99%	
AT	CZ	14	6,480	480	7	88	42		100%		
CZ	AT	4	2,344	586	31	125	73		100%		
AT	DE	31,208	29,356,222	941	24	764,575	717,342	45%	19%	36%	
DE	AT	37,050	34,523,853	932	24	902,071	839,677	38%	26%	36%	
AT	HU	12,272	7,890,896	643	30	370,408	238,173				100%
HU	AT	13,230	8,506,890	643	29	377,467	242,711				100%
AT	IT	32,052	9,315,261	291	30	976,316	286,167		12%	8%	80%
IT	AT	28,618	8,580,826	300	32	903,811	271,879		7%	5%	88%
AT	NL	679	681,072	1,003	22	15,004	15,049		47%	53%	
NL	AT	400	510,000	1,275	27	10,765	13,726		57%	43%	
AT	SI	28,854	9,297,989	322	28	804,686	262,339		33%		67%
SI	AT	23,910	7,679,289	321	36	861,683	286,176		19%		81%
SI	BA	5	655	131	23	115	15		100%		
AT	TR	555	871,026	1,569	21	11,775	18,480			100%	
TR	AT	425	671,500	1,580	10	4,404	6,958			100%	
BA	SI	5	2,492	498	2	12	6		100%		
BE	BG	102	234,635	2,300	29	2,970	6,832		100%		
BG	BE	35	75,618	2,161	7	248	537		89%	11%	
BE	CH	15,850	10,325,198	651	22	353,828	230,495		65%	35%	
CH	BE	16,381	9,446,843	577	14	236,524	136,402		53%	47%	
BE	DE	18,881	10,017,335	531	23	431,483	230,848		54%	46%	
DE	BE	17,504	9,855,060	563	19	340,341	188,479		56%	44%	
BE	ES	12,087	17,871,623	1,479	28	334,724	495,023		32%	68%	
ES	BE	9,829	16,411,837	1,670	20	194,756	322,519		43%	57%	
BE	FR	32,526	17,332,742	533	19	620,484	329,445		41%	59%	
FR	BE	19,368	8,521,686	662	30	336,224	150,978		44%	56%	
BE	GR	272	726,672	2,672	26	7,140	19,075		100%		
GR	BE	139	370,003	2,672	9	1,245	3,325		91%	9%	
BE	HU	75	134,741	1,809	19	1,441	2,606		40%	60%	
HU	BE	374	689,992	1,845	10	3,781	6,976		49%	51%	
BE	IT	83,256	90,400,862	1,086	26	2,165,489	2,353,131	14%	24%	62%	
IT	BE	77,747	83,391,378	1,073	21	1,631,035	1,745,073	15%	20%	65%	
BE	NL	2,639	520,752	197	16	42,216	8,332		12%	88%	
NL	BE	2,594	465,059	179	18	46,692	8,371		24%	76%	
BE	PL	3,611	6,636,099	1,838	28	99,583	183,034		41%	59%	
PL	BE	3,080	4,841,760	1,572	15	45,327	71,255		42%	58%	
BE	RO	4,991	7,816,970	1,566	23	115,896	181,535	10%	1%	89%	
RO	BE	4,507	8,217,480	1,823	22	100,775	183,760	11%	13%	76%	
BE	RU	974	829,135	851	30	29,090	24,763		100%		
RU	BE	435	707,956	1,627	9	3,774	6,142		99%	1%	
BE	TR	203	486,128	2,395	28	5,718	13,693		100%		
TR	BE	164	377,685	2,310	8	1,320	3,050		83%	17%	
BG	DE	7	9,800	1,400	16	115	160	4%	42%	54%	
BG	SI	7	6,349	907	16	115	104		100%		
CH	DK	5	6,035	1,341	11	51	69	44%	56%		
DK	CH	5	6,705	1,341	17	84	113		36%	64%	
CH	DE	23,683	14,906,011	629	16	388,422	250,984	31%	51%	18%	
DE	CH	34,588	21,829,791	631	25	863,428	540,925	22%	56%	22%	
CH	ES	115	136,942	1,196	24	2,716	3,248		100%		
CH	FR	158	97,207	617	26	4,120	2,543		100%		
CH	IT	3,881	1,195,492	308	24	93,330	28,753	76%	17%	7%	
IT	CH	6,084	1,863,467	306	27	163,077	49,953	55%	27%	18%	
CH	NL	9,992	7,812,879	782	18	176,171	137,757		44%	56%	
NL	CH	11,460	7,926,468	692	19	221,677	153,333		54%	46%	
CH	NO	220	286,577	1,303	27	5,841	7,609	99%	1%		
NO	CH	182	236,495	1,303	13	2,352	3,065		80%	20%	
CH	SE	320	326,012	1,019	27	8,575	8,736	99%	1%		
SE	CH	108	114,418	1,064	27	2,864	3,049	24%	49%	27%	
CZ	DE	9,312	6,238,705	670	19	178,688	119,721	42%	41%	17%	
DE	CZ	12,562	12,113,726	964	24	302,060	291,281	44%	39%	17%	
CZ	IT	2,220	2,483,621	1,119	24	53,694	60,084	57%	35%	8%	
IT	CZ	2,350	1,265,475	539	22	51,826	27,908	54%	32%	14%	
CZ	ME	28	32,368	1,156	28	794	918			100%	
CZ	PL	94	78,073	835	16	1,450	1,211		17%	83%	
PL	CZ	101	87,737	873	4	392	342		17%	83%	
CZ	SI	7,563	6,461,903	854	14	104,846	89,581		100%		
SI	CZ	7,948	6,792,838	855	13	107,044	91,486		100%		
DE	BIH	6	8,400	1,400	22	130	182		67%	33%	
DE	DK	1,572	1,514,385	964	25	39,422	37,989	4%	46%	50%	
DK	DE	1,755	1,450,102	826	6	10,462	8,644	2%	75%	23%	
DE	ES	16,728	25,105,941	1,501	25	420,362	630,912	2%	76%	22%	
ES	DE	16,991	24,889,245	1,465	23	395,684	579,617	5%	65%	30%	
DE	FI	106	101,023	953	26	2,785	2,654		61%	39%	
FI	DE	96	74,057	771	6	531	409		100%		
DE	FR	9,793	8,400,669	858	25	240,948	209,655	3%	57%	40%	
FR	DE	10,935	9,550,737	873	17	181,230	158,739	3%	12%	85%	
DE	GR	149	273,679	1,843	26	3,845	7,086		100%		
GR	DE	84	98,294	1,177	8	660	777	40%	33%	27%	
DE	HR	16	18,999	1,226	19	291	357		23%	77%	
HR	DE	1	1,324	1,324	2	2	3		100%		

Relations from	Relations to	Consign-ments	Consign-ments-km	Average Distance	Average Weight	Gross Weight	Tonnes-km	Techniques, % consignments			
Country		C	S*km		t/C	t	1.000 tkm	ST	SB/CT <8,30m	SB/CT >8,30m	RoMo
		1	2	3=2/1	4=5/1	5	6=2*4	7	8	9	10
DE	HU	9,643	10,652,017	1,105	26	253,367	279,329	40%	38%	22%	
HU	DE	8,726	9,594,071	1,099	21	183,705	200,494	64%	22%	14%	
DE	IT	263,413	206,611,045	784	29	7,578,647	5,869,379	29%	30%	21%	20%
IT	DE	289,057	205,852,828	712	24	7,075,528	4,897,954	28%	30%	24%	18%
DE	NL	50,274	33,385,564	664	22	1,096,257	725,478		55%	45%	
NL	DE	53,718	37,429,576	697	18	987,827	662,505	3%	40%	57%	
DE	NO	2,064	2,327,872	1,128	27	55,936	63,087	3%	84%	13%	
NO	DE	1,020	1,124,172	1,103	18	18,427	20,319		30%	70%	
DE	PL	33,454	31,601,580	945	18	618,590	575,863		38%	62%	
PL	DE	23,374	21,328,157	912	11	254,420	220,435	6%	37%	57%	
DE	PT	504	1,193,645	2,371	28	14,187	33,632		80%	20%	
PT	DE	311	759,278	2,445	9	2,938	7,186		100%		
DE	RO	532	676,652	1,272	29	15,426	19,625	2%	96%	2%	
RO	DE	295	360,612	1,224	8	2,378	2,929	2%	97%	1%	
DE	RU	824	491,196	596	28	22,888	13,652		88%	12%	
RU	DE	607	974,803	1,606	7	4,478	7,192		87%	13%	
DE	SE	6,964	7,163,547	1,029	26	179,914	185,069		99%	1%	
SE	DE	4,933	4,783,757	970	16	80,834	78,389	78%	7%	15%	
DE	SI	4,473	5,356,733	1,198	30	133,643	160,065	63%	21%	16%	
SI	DE	5,602	4,243,739	758	8	46,665	35,350		100%		
DE	SK	351	408,369	1,163	25	8,806	10,246	11%	77%	12%	
DE	TR	3,500	3,185,292	910	23	81,409	74,089		50%	50%	
TR	DE	3,009	2,917,061	969	21	64,506	62,535		48%	52%	
DE	YO	5	6,300	1,400	22	99	139	61%	20%	19%	
YO	DE	3	3,297	1,099	7	21	24			100%	
DK	IT	4,195	6,145,675	1,465	22	90,861	13,3111	36%	36%	28%	
IT	DK	10,212	15,215,273	1,490	26	266,739	397,744	60%	17%	23%	
ES	FR	682	492,404	722	22	15,004	10,833		50%	50%	
FR	ES	454	314,386	692	18	8,080	5,648		44%	56%	
ES	IT	49	52,234	1,066	22	1,076	1,147		88%	12%	
IT	ES	90	94,409	1,049	22	1,997	2,095		74%	26%	
FR	IT	24,707	22,731,366	920	26	646,427	602,574	1%		99%	
IT	FR	25,315	25,894,202	1,023	21	529,977	542,113	1%	14%	85%	
GR	SI	8	4,278,947	1,359	4	32	17,159		100%		
SI	GR	10	13,780	1,378	30	303	418		100%		
HR	AT	14	7,223	516	21	292	151		57%	43%	
HR	HU	38	22,188	584	5	183	107		11%	89%	
HU	HR	1,155	680,828	589	3	3,408	2,009		64%	36%	
HR	RS	1	633	633	9	9	6			100%	
RS	HR	1	633	633	4	4	3			100%	
HR	SI	169	34,358	203	6	1,003	204		42%	58%	
SI	HR	127	9,470	75	15	1,892	141		100%		
HU	IT	908	620,164	683	5	4,957	3,386		33%	67%	
IT	HU	639	436,437	683	19	11,838	8,085		54%	46%	
HU	NL	572	733,621	1,284	18	10,163	13,046		70%	30%	
NL	HU	2,466	3,166,344	1,284	23	55,818	71,671		81%	19%	
HU	SI	10,275	7,014,743	683	14	146,460	99,988		100%		
SI	HU	12,768	8,806,983	690	15	190,894	131,673		100%		
IT	LU	1,498	1,070,713	715	10	14,752	10,548		100%		
LU	IT	2,692	1,883,054	700	31	84,669	59,226		100%		
IT	NL	20,865	24,687,135	1,183	21	432,213	515,713	2%	38%	60%	
NL	IT	37,750	44,762,125	1,186	25	943,962	1,120,068	2%	41%	57%	
IT	PL	507	309,686	611	27	13,687	8,360		88%	12%	
PL	IT	86	51,665	604	22	1,884	1,138		77%	23%	
IT	RU	99	70,028	707	21	2,062	1,458		68%	32%	
RU	IT	3	5,461	1,820	29	87	158		100%		
IT	SE	5,154	7,435,369	1,443	23	118,551	171,026	6%	68%	26%	
SE	IT	7,658	9,624,677	1,257	28	210,877	264,894	28%	52%	20%	
IT	SI	172	69,886	408	20	3,490	1,422		21%	79%	
SI	IT	2,693	712,514	265	3	8,179	2,164		100%		
MK	SI	2	2,124	1,062	3	6	6		100%		
SI	MK	16	15,184	949	5	82	78		100%		
NL	RO	565	1,259,950	2,230	31	17,248	38,463		96%	4%	
RO	NL	270	602,100	2,230	8	2,163	4,823		97%	3%	
NL	RU	151	344,582	2,282	30	4,477	10,216		100%		
RU	NL	121	274,981	2,282	8	904	2,063		97%	3%	
PL	RU	643	1,163,755	1,810	28	17,808	32,231		100%		
RU	PL	373	784,179	2,105	10	3,579	7,534		89%	11%	
RO	HU	10	2,390	239	8	78	19		100%		
RO	SI	20	26,910	1,346	4	73	100		100%		
SI	RO	20	22,760	1,138	27	545	621		100%		
RS	SI	222	118,646	534	3	759	406		100%		
SI	RS	286	123,438	432	20	5,597	2,416		100%		
SI	PL	2	2,988	1,494	12	24	35		100%		
SI	SK	17,408	13,890,714	798	13	219,585	175,217		100%		
SK	SI	13,924	11,406,262	819	7	103,455	84,749		100%		
SI	TR	1,161	1,771,686	1,526	27	31,173	47,570		100%		
TR	SI	1,384	2,111,984	1,526	9	12,855	19,616		100%		
SI	XX	13	3,198	246	16	213	52		100%		
XX	SI	13	5,731	441	2	30	13		100%		
TOTAL		1,707,302	1,404,392,044	823	24	40,256,762	32,499,661	16%	37%	34%	13%

Member companies

ADRIA KOMBI

Tivolska 50
SLO - 1000 Ljubljana

Tel.: +386 1 23 45 280
Fax: +386 1 23 45 290

infor@adriakombi.si
www.adriakombi.si

Activities: UCT - RoMo - RSO
Agencies: SI - TR
Total traffic: 305 000 TEU
Revenue: 42 million €

ALPE ADRIA

Via S. Caterina da Siena, 1
I - 34122 Trieste

Tel.: +39 040 63 92 33
Fax: +39 040 36 48 42

amministrazione@alpeadria.com
www.alpeadria.com

Activities: UCT - RoMo
Agency: IT
Total traffic: 97 000 TEU
Revenue: 23 million €

BOHEMIAKOMBI

Opletalova 6
CZ - 113 76 Praha 1

Tel.: +420 2 42 444 560
Fax: +420 2 42 444 924

info@bohemiakombi.cz
www.bohemiakombi.cz

Activity: UCT
Agency: CZ
Total traffic: 24 000 TEU
Revenue: n/a

CEMAT

Via Valtellina 5-7
I - 20159 Milano

Tel.: +39 02 668 951
Fax: +39 02 668 00 755

info@cemat.it
www.cemat.it

Activities: UCT - RSO
Agency: IT
Total traffic: 631 000 TEU
Revenue: 181 million €

COMBIBERIA

c/Rafael Herrera, 11; 2º, Pta 203
E - 28036 Madrid

Tel.: +34 91 314 98 99
Fax: +34 91 314 93 47

combiberia.madrid@combiberia.com
www.combiberia.com

Activity: UCT
Agency: ES
Total traffic: 46 000 TEU
Revenue: n/a

CROKOMBI

Heinzelova ulica 51
HR - 10000 Zagreb

Tel.: +385 1 61 51 867
Fax: +385 1 61 51 869

crokombi@crokombi.hr
www.crokombi.hr

Activity: UCT
Agency: HR
Total traffic: 3 000 TEU
Revenue: n/a

HUPAC

Viale R. Manzoni 6
CH - 6830 Chiasso

Tel.: +41 91 695 28 00
Fax: +41 91 695 28 01

info@hupac.ch
www.hupac.ch

Activities: UCT - TTM - RSO - ECM - RU - CA
Agencies: BE - CH - DE - IT - NL - RU
Total traffic: 1 029 000 TEU
Revenue: 377 million €

INTERFERRYBOATS

Houtdok 25 A
B - 2030 Antwerp

Tel.: +32 3 270 27 00
Fax: +32 3 226 26 26

info@interferryboats.com
www.interferryboats.com

Activities: UCT - TTM - ECM - CA - RH
Agencies: BE - DE - TR
Total traffic: 685 000 TEU
Revenue: n/a

KOMBIVERKEHR

Zum Laurenburger Hof 76
D - 60594 Frankfurt

Tel.: +49 69 79 50 50
Fax: +49 69 79 50 51 19

info@kombiverkehr.de
www.kombiverkehr.de

Activities: UCT - TTM -RSO - ECM - RU
Agencies: DE - ES - IT - NL - PL
Total traffic: 1 400 000 TEU
Revenue: 430 million €

NAVILAND CARGO

15 - 17 Allées de l'Europe
F - 92588 Clichy-la-Garenne Cedex

Tel.: + 33 1 41 05 33 01
Fax: + 33 1 40 87 08 20

contact@naviland-cargo.com
www.naviland-cargo.com

Activities: UCT - TTM - RSO - RU
Agency: FR
Total traffic: 256 000 TEU
Revenue: n/a

NOVATRANS

15 - 17 Allées de l'Europe
F - 92588 Clichy-la-Garenne Cedex

Tel.: +33 1 40 87 97 00
Fax: +33 1 40 87 97 65

info@novatrans.eu
www.novatrans.eu

Activities: UCT - TTM - RSO
Agency: FR
Total traffic: 288 000 TEU
Revenue: 80 million €

POLZUG

Container Terminal Burchardkai
Bürogebäude 1
D - 21129 Hamburg

Tel.: +49 40 74 11 45 0
Fax: +49 40 74 11 45 45

hamburgpolzug.de
www.polzug.de

Activities: UCT - TTM - CA - RH
Agencies: DE - PL - UA - GE - AZ
Total traffic: 101 000 TEU
Revenue: 33 million €

RALPIN

Belchenstrasse 3
CH - 4601 Olten

Tel.: +41 58 822 88 88
Fax: +41 58 822 88 80

info@ralpin.com
www.ralpin.com

Activity: RoMo - ECM
Agencies: CH - DE - IT
Total traffic: 192 000 TEU
Revenue: n/a

ROCOMBI

Blvd. Dinicu Golescu 38
RO - 010873 Bucharest

Tel.: +40 21 312 23 14
Fax: +40 21 312 17 74

info@rocombi.ro
www.rocombi.ro

Activity: UCT
Agency: RO
Total traffic: 10 000 TEU
Revenue: n/a

Activities – glossary:

UCT: Unaccompanied Combined Transport
RoMo: Rolling Motorway
TTM: Transhipment Terminal Management
RSO: Rolling Stock Operator (owner / lessee)
ECM: Entity in Charge of Maintenance
RU: Railway Undertaking
CA: Customs Agent
RH: Road Haulage

Countries:

AM (=Albania), AT, BE, BG, BiH (=Bosnia), BZ (=Belarus), CH, CZ, DK, DE, EE, EL, ES, FI, FR, HR, HU, IE, IT, LT, LU, LV, ME (=Crna Gora), NL, PL, PRC (=China), PT, RO, RS (=Serbia), RU (=Russia), SI, SK, SE, TR, UK

UIRR Consignment: corresponds to the transport capacity of one lorry on the road (equivalent to 2.0 EVP/TEU). A TEU (twenty-foot equivalent) is a unit of measurement corresponding to an ISO container of 20 feet in length (6.10m), used to express traffic capacities or flows, principally in the maritime transport sector.

Terminal Activities

TRANSHIPMENT TERMINALS MANAGED BY UIRR MEMBERS ON 31.12.2012

Name of terminal	Location		Modes connected				Total turnover (in units)	Website of terminal
	City	Country	Rail	Road	IWW	Sea		
Aarau	Aarau	CH	•	•			N/A	www.hupac.ch
Antwerp Cirkeldyck	Antwerp	BE	•	•		•	121,000	www.interferryboats.be/terminal-cirkeldyck
Antwerp HTA Quai 468	Antwerp	BE	•	•			N/A	www.hupac.ch
Antwerp Zomerweg	Antwerp	BE	•	•	•	•	95,000	www.interferryboats.be/zomerweg
Anwterp Main Hub	Antwerp	BE	•	•		•	125,000	www.interferryboats.be/mainhub
Avignon	Avignon	FR	•	•			N/A	www.novatrans.fr
Basel Weil	Basel	CH	•	•	•		N/A	www.hupac.ch
Basel Wolf	Basel	CH	•	•	•		N/A	www.hupac.ch
Bordeaux Hourcade	Bordeaux	FR	•	•			N/A	www.naviland-cargo.com
Busto Arsizio Gallarate	Milano	IT	•	•			N/A	www.hupac.ch
Chiasso Z4	Chiasso	CH	•	•			N/A	www.hupac.ch
Dąbrowa Górnicza	Dąbrowa Górnicza	PL	•	•			48,836	www.polzug.de/terminals/dabrowa-gornicza.html
Gevrey	Gevrey	FR	•	•			N/A	www.naviland-cargo.com
Hub Terminal Poznan	Gadki	PL	•	•			128,333	www.polzug.de/terminals/neu-hub-terminal-poznan.html
Le Havre Combiné	Le Havre	FR	•	•		•	N/A	www.naviland-cargo.com
Lugano Vedeggio RoLa	Lugano	CH	•	•			N/A	www.hupac.ch
Marseille Canet	Marseille	FR	•	•		•	N/A	www.naviland-cargo.com
Miramas	Marseille	FR	•	•			N/A	www.novatrans.fr
Mouguerre	Mouguerre	FR	•	•			N/A	www.novatrans.fr
Noisy-Le-Sec	Paris	FR	•	•			N/A	www.novatrans.fr
Novara RoLa	Novara	IT	•	•			N/A	www.hupac.ch
Singen	Singen	DE	•	•			N/A	www.hupac.ch
Terminal Kontenerowy Pruszków	Pruszkow	PL	•	•			39,182	www.polzug.de/terminals/pruszkow.html
Terminal Kontenerowy Wrocław	Wroclaw	PL	•	•			32,556	www.polzug.de/terminals/wroclaw.html
Toulouse Fenouillet	Toulouse	FR	•	•			N/A	www.naviland-cargo.com
Valenton	Paris	FR	•	•			N/A	www.novatrans.fr
Venissieux	Lyon	FR	•	•			N/A	www.novatrans.fr www.naviland-cargo.com


IU Interunit Commission Technique / Technische Kommission
2013
Carte de codification des lignes ferroviaires pour le transport de
Semi-Remorques
Profilkarte der Bahnstrecken für Transporte von
Sattelanhänger
Legende:
Largeur/Breite ≤ 2500mm
Largeur/Breite >2500 ≤ 2600mm
P 22
P 341
P 339 (SNCF)
P 32
P 351
P 349 (SNCF)
P 45
P 364
P 359 (SNCF)
P 70
P 400
P 80
P 400
P 80
P 410
voir remarques / siehe Hinweise
Lignes sans codification pour semi-remorques/ Bahnstrecken ohne Sattelanhängerkodifizierung
Les hauteurs de rive admissibles (cm) des unités de chargement, chargées sur wagon, sont les suivantes:
Die zulässigen Eckhöhen (cm) entsprechenden Ladeeinheiten auf demWagen verladen errechnen sich wie folgt:
P ?? Numéro de codification additionné du nombre 330.
Kodierungszahl addiert mit der Zahl 330
(Example/Beispiel P 22+330 = 352cm)
P ??? Pour Semi-Remorques avec largeur de 2600mm, égal au numéro de codification.
Für Sattelanhänger mit Breite von 2600mm, gleich der kodierungszahl
(Example/Beispiel C 341= 341cm)
Manutention par grue à palonnier à pinces
Kranumschlag mit Greifzangen
Route Roulante
Rollende Landstrasse
Manutention par grue à palonnier à élingues
Kranumschlag mit Seilgeschirr
Note: pour les terminaux représentés par un symbole rouge, les données sont dans la webpage www.uirr.com
Bemerkung: die Daten der rot gezeichneten Terminals sind auf den Webseiten www.uirr.com abrufbar
Copyright by INTERUNIT
Au verso Caisses mobiles
Rückseite Wechselbehälter
Remarques: Les lignes PKP ne sont pas codifiées. Les valeurs de codifications reportées sont indicatives (non officielles). L'autorisation comme transport exceptionnel est nécessaire pour les trafics avec la Pologne.
Anmerkung: Die PKP Strecken sind nicht kodifiziert. Die angegebenen Kodifizierungswerte sind indikativ (nicht offiziell). Für den Verkehr mit Polen ist die Zulassung für einen Sondertransport notwendig.
Remarques: Lignes praticables avec des accords multilatéraux. L'autorisation comme transport exceptionnel est nécessaire.
Anmerkung:Befahrbare Linien mit vieleitigen Vereinbarungen. Für den Verkehr mit Polen ist die Zulassung für einen Sondertransport notwendig.
INFRABEL
Right On Track
Direction I-AR.23 - b4 s.41/3
Building South Crystal
Avenue Fonsny,13
B-1060 Bruxelles
N°: 10961-P.cdr
Valeurs de codifications sans limitations aucunes.
Des valeurs plus importantes que celles indiquées peuvent être utilisées moyennant vérification préalable auprès des Sociétés de transport et autorisation de transport exceptionnel.
Les profils des lignes fixés par le DB sont les valeurs de codification au maximum la cas échéant avec le conditions de transport.
Kodifizierungswerte ohne irgendwelche Einschränkungen.
Höhere Werte als die angegebenen, können angewendet werden, wenn sie vorher mit den Transportgesellschaften überprüft wurden und wenn eine aussergewöhnliche Sendung genehmigt wurde.
Die angegebenen Streckenprofile bei der DB sind die max. Kodifizierungswerte ggf. mit Beförderungsbedingungen.
24/09/2012

UIRR

INTERNATIONAL UNION
FOR ROAD-RAIL
COMBINED TRANSPORT

UIRR s.c.r.l.
31, rue Montoyer - bte 11 | B-1000 Brussels | Belgium
www.uirr.com | headoffice.brussels@uirr.com
Tel. : +32 (0)2 548 78 90 | Fax : +32 (0)2 512 63 93