



Loss of infrastructure capacity causes decline

A wave of infrastructure works-related railway line closures and extreme weather such as the torrential rains and flooding in Central Europe, Northern Italy, Switzerland and, recently, in Spain resulted in the loss of significant capacities for intermodal rail freight during the last months. This resulted, after a rebound during the April-June quarter, in a 0,79% decline of Combined Transport performance during the third quarter of the year. Reflecting on the high number of uncertainties and anticipated disruptions, the UIRR CT

Sentiment Index remains unchanged at "neutral" for the next 12 months.

Despite the successful diesel shuttle circumvention of the Rhine Valley line closure using the network on the French side of the Rhine, the 3-week-long disruption from 9 to 30 August resulted in the loss of many train paths, while substantial additional costs were incurred due to the longer transit times. Numerous other disturbances and disruptions continue to hinder the competitiveness of intermodal rail freight, which include the most important connection between France and Italy: the Fréjus line.

Europe's unpreparedness for climate change-related weather extremities was on display both during the summer heatwave and the floodings caused by torrential rain in September. The excessive damage caused to property and to the transport infrastructure resulted in numerous train cancellations. A standing European-level crisis and contingency mechanism would need to be established to help minimise the disruptions caused to cross-border traffic, especially since the frequency of such events is likely to increase in the future.

The summer months delivered progress in the European legislative theatre since the Hungarian Presidency of the Council produced a promising compromise proposal for the revision of the Combined Transport Directive. Discussions continue in the Council working group to find a solution that is acceptable to a majority of the Member States. The European Parliament named its rapporteur and shadow rapporteurs for the dossier, who will begin deliberation in the fourth quarter.

Following in the footsteps of Romania, new state aid programmes were announced in France, Poland and Spain to accelerate the development of intermodal rail freight, Combined Transport and transshipment terminals. UIRR applauds these initiatives but continues to argue in favour of a harmonised and transparently communicated European-level system of promotional programmes to achieve maximum effectiveness. The updated EU State Aid Guidelines and the Transport Block Exemption Regulation, as well as the revision of the Combined Transport Directive, should make up the required European regulatory framework.

The Combined Transport community continued with its development and investment initiatives, manifested in the launching of several new services, the opening of new or improved terminals, as well as kicking off terminal extension or construction projects. Confidence remains high that, through serving as the backbone of European freight-logistics, Combined Transport can meaningfully contribute to boosting Europe's competitiveness and to delivering the objectives of the Clean Industrial Deal.

Ralf-Charley Schultze – Director General



European Intermodal Summit

3 December 2024 10h00 – 12h00
online conference



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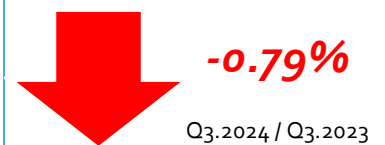
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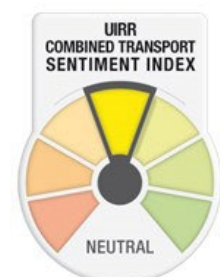
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UIRR Quarterly CT Performance Gauge



Business outlook for the 12 months between 1 October 2024 - 30 September 2025



Gotthard Base Tunnel reopens on time

September 2024

Works have been completed on the Gotthard Base Tunnel and after testing the route will be returned to the users on 2 September 2024.

Links: <https://www.uirr.com/en/news/mediacentre/2931-gotthard-base-tunnel-to-reopen-in-september.html> and <https://www.uirr.com/en/news/mediacentre/3004-gotthard-base-tunnel-fully-operational-again.html>

Fréjus line reopening delayed further to 2025

August 2024

The re-opening of the Fréjus line between France and Italy has been delayed yet again to the Spring of 2025, which severely compromises rail freight connections between the two countries.

Link: <https://www.uirr.com/en/news/mediacentre/2977-2024-08-07-14-11-12.html>

Netherlands: TLN voices concern about track access charge increase

July 2024

TLN warns of the increasing costs of intermodal rail freight, which disables modal shift and even risks reverse modal shift from electric rail freight back to trucks.

Link: <https://www.uirr.com/en/news/mediacentre/2979-tln-remains-vigilant-about-unbearable-costs-of-intermodal-transport.html>

Spain: autopistas ferroviarias develops dynamically

July 2024

New rail motorway (autopistas ferroviarias) services are launched in Spain by several operators with an aim to shift semi-trailers from road to rail freight.

Link: <https://www.uirr.com/en/news/mediacentre/2935-spain-transitalia-and-tramesa-launch-a-network-of-railway-motorways.html> and <https://www.uirr.com/en/news/mediacentre/2939-spain-continues-efforts-to-develop-rolling-highways.html>

ETS carbon credits to fund rail freight

July 2024

The Italian association Fermerci suggested to the government in Rome to introduce a scheme whereby ETS carbon credits can be used to finance energy efficient electric rail freight.

Link: <https://www.uirr.com/en/news/mediacentre/2936-emission-trading-system-ets-carbon-credit.html>

Poland: road tolls to partially fund rail freight

August 2024

Poland's Ministry of Transport submitted a bill to parliament in which the coverage of electronic road tolling is proposed to be extended to a wider proportion of the road network, while the proceeds may be used to finance rail freight developments.

Link: <https://www.uirr.com/en/news/mediacentre/2985-polish-infrastructure-ministry-pushes-for-more-road-tolls-to-support-rail.html>

Sweden: appeals for more infrastructure for rail freight

July 2024

SNCF Réseau launches a decade long infrastructure development programme targeting lines used by freight trains worth €4 billion.

Link: <https://www.uirr.com/en/news/mediacentre/2939-spain-continues-efforts-to-develop-rolling-highways.html>

Italy: associations urge state intervention to assist rail freight

August 2024

Italian rail freight is suffering from a dramatic loss of infrastructure capacities which results in a significant loss of business and revenues. These impacts should be compensated by the State.

Link: <https://www.uirr.com/en/news/mediacentre/2989-italian-associations-urge-for-state-intervention.html>

Germany: EU bans DB cargo funding scheme – reorganisation looms

August 2024

DB Cargo's receipt of state aid from the German government through transfers provided within the structure of Deutsche Bahn has been found illegal and was banned with immediate effect by the European Commission.

Link: <https://www.uirr.com/en/news/mediacentre/2996-eu-to-ban-deutsche-bahns-financial-support-for-db-cargo.html>

DAC to cost up to 9-times the original estimations

July 2024

A recently conducted cost benefit analysis indicates that retrofitting freight wagons with the digital automatic coupler (DAC) might cost as much as 9-times more than what was assumed earlier.

Link: <https://www.uirr.com/en/news/mediacentre/2942-dac-implementation-might-cost-9-times-more-than-expected.html>

France: intermodal development master plan launched

October 2024

The government of France published its updated master plan for the development of intermodal freight transport with a focus on the need to develop transshipment terminal capacities and to construct new terminals in undersupplied areas or regions.

Link:

https://www.ecologie.gouv.fr/sites/default/files/documents/241024_Schema_directeur_TC_H32_vpublie.pdf

Girteka's combined transport development programme

September 2024

Girteka unveiled the second phase of its sustainability programme, which focuses on the potential of a shift to intermodal freight transport recognising its huge potential in greening freight transport.

Link: <https://www.uirr.com/en/news/mediacentre/3014-dacarbonisation-girteka-focuses-on-intermodality-and-the-use-of-hvo-.html>

Interview with former UIRR Chairman Robert Breuhahn

August 2024

Several crises impacted Combined Transport negatively from the energy crisis, the economic downturn, degrading railway infrastructure and excessive works sites, as well as inconsistent policies by governments.

Link: <https://www.uirr.com/en/news/mediacentre/3001-interview-with-former-uirr-chairman-robert-breuhahn.html>

EU Court of Justice decision on Mobility Package-related challenges

October 2024

The EU Court of Justice struck the 8-weekly return of trucks to their country of registration from the law, but left all other challenged provisions legal, including the possibility of Member States to derogate from Article 4 of the Combined Transport Directive.

Link: <https://www.uirr.com/en/news/mediacentre/3020-ecj-ruling-removes-8-week-vehicle-return-obligation.html>

Hungarian Council Presidency proposes compromise on the CTD

October 2024

The rotating Hungarian Presidency of the Council tabled a compromise proposal on the definition of 'combined transport operation' in late September. The Combined Transport community applauded the constructive attempt, while continuing to work towards delivering a constructive revision of the Directive.

Link: <https://www.uirr.com/en/news/mediacentre/3019-hungarian-eu-council-presidency-new-definition-of-combined-transport.html>

France: combined transport performance is up by 16% in H1.2024

September 2024

Intermodal rail freight increased by 16% as expressed in tonne-kilometres in France during the first six months of 2024. The dynamic growth comes on top of a relatively low market share in France.

Link: <https://www.uirr.com/en/news/mediacentre/3012-france-ct-increases-16-in-h1.html>

Spain: rail freight grows for 3 quarters in a row

September 2024

Rail freight volumes in Spain grew for the third quarter in a row, however it was still lower than at the end of June 2023. The growth is supported by the freight-related rail infrastructure investments under way.

Link: <https://www.uirr.com/en/news/mediacentre/3008-rail-freight-in-spain-volume-growth-for-3rd-consecutive-quarter-.html>

Middle Corridor transport volumes are up by 60%

August 2024

Based on reporting by the government of Kazakhstan, the volumes transported along the Middle Corridor increase by 60% during the first six months of 2024.

Link: <https://www.uirr.com/en/news/mediacentre/3000-middle-corridor-freight-volumes-over-60-growth.html>

North American intermodal rail freight shows strong growth

October 2024

Intermodal rail freight increased by 8,9% compared to a year earlier during the first nine months of 2024 in North America.

Link: <https://www.aar.org/wp-content/uploads/2024/10/2024-10-30-railtraffic.pdf>

