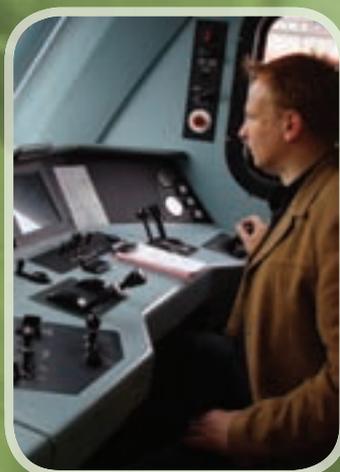




# UIRR ANNUAL REPORT

International Union of combined Road-Rail transport companies

# 2008



## IMPRESSUM

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# PREFACE

Eugenio Muzio - Chairman of the Board UIRR



The UIRR articles of association state that, after serving two three-year terms of office, the Chairman of the Board may not seek re-election again. This will apply to me in June 2009, and this affords me an opportunity to summarise key points in the work of the UIRR over these last six years.

The traffic managed by our member companies saw sustained growth between 2003 and 2008 (+32%), especially internationally (+42.3%).

These percentages illustrate the firm vitality of Combined Transport (CT) and the growing interest shown by the market in an environment-friendly technique which helps to reduce road congestion and to increase the level of safety, although without losing the flexibility and reliability of road transport.

Against this background, it is satisfying to see the efforts made by the railway undertakings (RUs) in order to improve quality of service which have led to a recovery, increasing the number of punctual international trains to 65%; although our expectation of at least 85% punctuality is still quite a long way off.

The period we are looking at also saw significant changes to the shareholders of some of our member companies. In a number of cases, the incumbent RUs have managed to increase their holdings until they now own the majority of shares. Where this change confirms the fact that the rail world sees CT as enormously important, it fundamentally alters the role played by the operators who are now becoming strategic commercial structures having in some cases no longer quite the same independence as before.

The period from 2003 to 2008 also saw the UIRR engage in a huge amount of study and research work jointly funded by the EU, with the close collaboration between our Brussels based Office and our member companies helping to optimise the results.

These latter have also made massive investments in systems and equipment offering improved performances, such as modern wagons designed to meet the needs of the customer base made up of road haulage carriers, forwarding agents and logistics providers whilst at the same time optimising operations and the carrying of traffic; the number of these has gone past the 14,000 unit mark, which is assuredly impressive.

We should also underline the highly constructive and very special relationships with the EU Authorities which the UIRR has managed to develop over the years. Our Brussels meetings with both various Commissioners and their staff and, more regularly, with senior officials from the DG TREN, have led to greater mutual understanding and this is also something we have quite successfully achieved in our relationship with the European Parliament. Our status as a now key reference point in CT for these Authorities is flattering, as was the privilege granted to the UIRR when the ERA was set up of representing rail freight clients on its board through the position of Vice-Chairman.

I would like to end with a few thoughts about the future. Obviously CT has not been spared by the deep crisis which has hit the world since late 2008. In support of the article which follows, I would like to stress the fact that an involvement by the EU and national Authorities - which could take the form of one-off temporary aid - is essential in order to maintain the network of CT trains which run across Europe as broadly as possible so that, when the recovery does eventually come (sooner rather than later, we hope) CT will be ready and waiting to play its part in this recovery as a strategic instrument designed to support sustainable mobility.

A handwritten signature in green ink, appearing to read 'Eugenio Muzio'.

Eugenio Muzio

# COMBINED TRANSPORT UNDER THREAT



Rudy Colle - Director General UIRR

Nobody was in any doubt that the worldwide financial crisis would also have an effect upon the transport sector. Indeed, its ancillary role in economic life means that it depends directly on the consumption of goods and thus their production and distribution.



At the time of writing, we have trends up to late April, which means that they cover six months of very considerable upheavals since, across all techniques and routes, up to a quarter of the shipments we would normally expect have failed to materialise across a series of domestic and international routes.

We are seeing a slowdown of this kind in a very large number of production sectors, including main ones which lead to traffic – steel, chemicals, the motor industry – and the specific features of combined transport mean that it is being affected more than proportionally.

Indeed, over the years intermodal competition has led operators to develop their initial ranges of services involving single wagon-load traffic and move towards full and shuttle trains, usually interconnected at gateways, which allows closer monitoring of routing operations at the same time as economies of scale.

An initial loss of traffic of the kind we are currently seeing weakens this “structure” because even now just some ILUs fewer per train can mean that it makes a loss and thus becomes unsustainable, and its cancellation in turn reduces the traffic and sparks off a dangerous interactive impact on services.

This series of risks - which are clearly not just theoretical - needs to be curbed. In other words, while we are waiting for the recovery to arrive, we need to cut train operating costs, and the operators will not be able to achieve this on their own.

A crisis situation may have its good points, it is unfortunately also a circumstance under which one can count its true allies.

So attitudes vary enormously:

- some railway undertakings have cut their prices whereas others have not held back from increasing them!
- the infrastructure managers appear to be even more reluctant to get involved even though from a long-term point of view it is in their interest to help their clients to keep as many trains as possible going.
- from the point of view of the Authorities, there is also a big contrast between expressions of sympathy and actual support.

The lack of immediate financial support which would allow our sector to get through the 12 to 18 months for which the crisis is expected to last are seriously endangering both the patiently-constructed concept of CT and, at the same time, the transport system itself, even though it is a cornerstone of the EU policy due to its advantages in terms of the impressive reduction in the various drawbacks of road haulage.

For the Commission at the highest level to appear not to hear the calls from its Transport officials is difficult to understand given that the resources are available or can be found; as other sectors have found out.

So we are not merely pleading on behalf of our members' futures but also to safeguard a hard-won concept and one which it would be difficult to reinstate if it were to be swallowed up in the current storm.



# EFFICIENCY THROUGH STANDARDISATION



Martin Burkhardt - Director General UIRR

The introduction of containers and their standardisation within ISO<sup>1</sup> have given fresh momentum to the process of rationalisation, which has formed the basis for the enormous extension of worldwide trade.



For continental transport operations, CEN<sup>2</sup>-standardised swap bodies have become established in Europe as they are better suited to the measures authorised for road vehicles and also lighter and more flexible for loading. Common characteristics ensure that many cranes and wagons are suitable for use with all loading units. Thanks to the construction standards and certification processes, the various participants in the transport chain can be sure that they will be technically safe to operate.

As part of the rail liberalisation process, the leaflets which up to now applied only to members of the UIC are transposed into European standards which act as a reference for all modes of transport and are at the same time modernised.

Thus the codification of loading units, consisting of three stages, is revised:

1. Checks on whether the loading unit meets the safety criteria (e.g. built and inspected in line with the EN12642 and EN283)
2. Assigning of a gauge code indicating the rail routes on which the container can travel.
3. Owner marking (EN13044)

In future, each loading unit will be shipped by the manufacturer with the authorisation certificate and the gauge code already in place. The identification of swap bodies and semi-trailers will henceforth be carried out in the same way as for maritime

containers. For these latter, there is the code assigned by the Bureau International des Containers based in Paris which is applicable worldwide. It is made up of three letters which identify the owner, then a "U" and finally 6 digits with which he numbers his containers independently, along with a check digit.

The capacity of the BIC-Code would be exhausted if, in future, all European carriers who have loading units wished to acquire codes of this kind. In addition its costs are too high for small companies.

The UIRR will assign a compatible EUROCODE (with A, B, D, E or K in the fourth position) for all companies which only carry out European transport operations.

All of the participants in the freight transport chain enjoy advantages:

- All loading units are suitable for CT, even if they are only originally acquired for road haulage purposes
- Logistics companies can number their loading units according to their own criteria (the 6 digits)
- No new code needs to be assigned when selling/purchasing second-hand loading units
- BIC/EUROCODE compatible owner codes simplify the processing of data
- This saves working time: IT-conform codes reduce data entry mistakes, given that 95% of typing mistakes are picked up by the check digit
- Suitable for Optical Character Recognition
- Compatibility with the TAF-TSI "computerisation of rail transport"
- Meets high security and risk prevention requirements



<sup>1</sup> ISO International Organization for Standardization

<sup>2</sup> CEN European Committee for Standardisation

# THE CHALLENGE FOR COMBINED TRANSPORT



Bernhard Kunz, Director General Hupac

After a five year period marked by strong, double-digit growth, Hupac's traffic expansion came for the first time close to a halt in 2008.



Overall, the company made 702,308 transport journeys, which represented an increase of 1.8 % in comparison with 2007. The reason for such weak growth lies in the economic recession and in the reduction in the flow of goods that is directly linked to it. While the first quarter still saw growth in double figures, this fell away over the rest of the year. Over the last quarter, transport volumes have fallen rapidly to show a loss of nearly 16 % in comparison with the levels recorded in the previous year.

Faced with the economic recession, Hupac quickly took steps to adjust its capacity to falling demand. Since its transport offering has been planned to deal with significantly higher volumes, it had to be reduced in a number of stages to achieve economically viable utilisation of the transport capacity. Thanks to restructuring and gateway solutions, the network could be maintained on all important markets.

Despite the crisis, we continued to invest throughout 2008 in the development of the transport system. Our own fleet of wagons has been enlarged, the most important Busto Arsizio-Gallarate terminal has been modernised and the extension to new terminal capacity has started. In September, construction work began on the HTA-Hupac Terminal Antwerp. In October, Hupac was a founding partner in the creation of the Joint Venture Combinant aimed at the construction of a new terminal in the port area of

Antwerp. In this way, Hupac has prepared the ground for its future in the fast-growing Benelux market.

The deepening of the recession in 2009 has obliged us to take other measures, such as reducing the number of wagons to rent and postponing part of the planned investments in rolling stock and infrastructure. In some areas, short-time working has been put in place.

We will not come out of the economic crisis before 2010. The rest of 2009 will remain a considerable challenge for all partners in the supply chain. The fall in the movement of goods requires coordinated action in order to maintain the Combined Transport system. We are pleased to note that, in the face of the recession, different railway undertakings have continued to work well together to maintain the CT network.

Along with the major challenges, this year also offers new opportunities. At the start of the year, we were able to add a Taulov to Verona Shuttle link. Other lines are planned for both the north-south and the east-west axes. We will also use the rest of this year to reorganise the company's central procedures and to provide greater added value to the market. We are convinced that, by using this strategy, we will be able to come out of the crisis stronger.



# THE ROLLING ROAD (ROLA) HAS A FUTURE AGAIN!



Franz Dirnbauer, Director General Ökombi

When Ökombi became part of the ÖBB/Rail Cargo Austria group in 2005, the operating result had reached a nadir with 200,000 lorries routed. Many experts then doubted whether RoLa would survive. And yet, in 2008, 330,000 lorries were transported, a record number up 14% on 2007.



## Its market:

the increase in fuel prices, changes at European level such as the introduction of mileage taxes, stricter checks on driving and rest times and the introduction of the digital tachograph are all factors which help to explain this recovery. The structure of the heavy vehicles market is another. Indeed, more than 80% of lorries running in Europe have no stackable structure and this percentage will only change slowly because more than 50% of European transport companies are small firms with limited resources, hesitating to switch over to unaccompanied CT. The short-term alternative is road haulage.

## Its advantages:

clients like RoLa because it gives them savings on costs, the ability to plan and reliability – a punctuality rate of 85% in 2008 – as part of an optimised logistics chain. Our RoLas are not seeing many empty transport operations and allow the lorry to continue moving towards its final destination whilst its driver is resting. This technique allowing the transfer of road traffic to the railways is one way of achieving the Kyoto targets by limiting CO<sub>2</sub> emissions and also reduces other external costs (poison gas, congestion, accidents).

## Its efficiency:

our low floor wagons which are appropriate for use over distances of from 100 to 700 km, are loaded on average 550 times a year

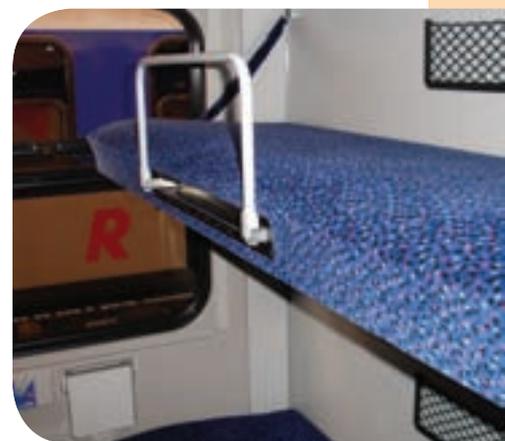
and travel in the region of 200,000 km. The wagons are fitted with disk brakes which allow a noise level between that of a goods train and a passenger train. A RoLa train with 20 lorries can be loaded or unloaded in just 20 minutes, in other words a high transfer output; it travels at a scheduled speed of 100 km/h.

## Its easy access:

it takes just three clicks to book and confirm a space using our website [www.oekombi.at](http://www.oekombi.at)

## Its potential:

the terminals built over the last few decades no longer cater to what current techniques can now offer. As a result of this, RoLa trains are not currently fully exploiting the potential of the new locomotives. This means that the fixed cost of a RoLa cannot compete with the low variable costs of lorries and thus requires financial aid. The EU, which supported a RoLa as part of the Marco Polo programme's RoMo-Net project for the first time in 2008 along with States such as Switzerland, Austria and Hungary and the Italian provinces of Trento and Trieste, take these circumstances on board. RoLa trains weighing a total of up to 1,900 tonnes and with up to 30 low floor wagons should be able to travel in future. So there will be less need for grants and RoLa trains will be ensured equal opportunities on goods train paths.



# AN UNUSUAL ECONOMIC MODEL WHICH WAS A BIG HIT IN 2008



Christian Dufour, Chairman of the Board Naviland Cargo

After a strategic retreat, NAVILAND Cargo recorded results in 2008 which show both that it has got its economic model right and that it has been successful in the CT segment of maritime transport, even against a background of very strong competition and labour disputes relating to the port reform process.



The industrial integration of rail production (traction on the lines and terminal services) carried out in 2007 led to a reduction in the costs of the company's most expensive link allowing it to offer a better response to the market's requirements by means of a greater ability to adapt.

These successes have led to the following achievements:

- a level of quality which is now setting standards on the market (96% of trains produced by NAVILAND Cargo are delayed by less than 1 hour),
- high load factor levels, close to saturation on certain lines,
- a denser service (opening of new links, 5 weekly trains between Paris and Marseilles, for instance),
- the ability to adapt to the market's new requirements, including the reorientation of the production facilities to the Antwerp route following the paralysis of the French ports due to port strikes and
- an increase in the international market share between 2007 and 2008 (+62 %).

As a result of our efforts, turnover reached 95.8M euros in 2008, up 22% on 2007, against the background of a balanced operational result. Volumes have seen 17% growth and now stand at more than 310,000 TEU.

2009 will be a decisive year with not only the need to capitalise on the successes of 2008 but also the challenge of successfully launching new developments, including those in areas not supplied by CT.

The worldwide economic slowdown seen since October 2008 is having a negative effect on our activity and we are facing extremely tough competition from the road; even so, NAVILAND Cargo does have many advantages:

- the now recognised quality of its service;
- its genuine neutrality which, together with its commitment to reliability, is the guarantee expected by the market;
- total control over rail production in order to increase its reactivity and its economic efficiency;
- the enhancing of its range produced in order to further improve the response to its clients' expectations; thus in 2009 NAVILAND Cargo will have the densest MADT (Magasins et Aires de Dépôt Temporaire – Temporary Warehouses Areas) network in France;



- lines gradually covered by the rail-maritime manifest offered to clients both for import and export purposes;
- dedicated slots and trains added to its range of mixed products.

Finally, NAVILAND Cargo's know-how is being exported outside Europe. Starting from mid-2009 it will be subcontractor of the handling on the Moroccan TANGER MED rail terminal.

NAVILAND Cargo will draw on the innovation (ensured by the professionalism of its staff) and on the level of quality (the best on its market) in order to get through the acute, deep economic crisis we are currently facing.

# FROM A REGULATED TRANSPORT POLICY TO LIBERALISATION



Vladimír Fišer, Director General Bohemiakombi

The transfer of freight from road to rail – the aim behind the creation of Bohemiakombi – is based on mutually beneficial co-operation between the forwarding agents and the railway undertakings (RUs).



Our company provides this type of Combined Transport (TC) for stackable semi-trailers (and also megatrailers), swap bodies, tank containers, and ISO containers.

Kombiverkehr-CS was set up in 1992 and restructured in 1995 to become Bohemiakombi spol.s. ro., with ČD Cargo and ČESMAD Bohemia each owning 30% of the shares, thus illustrating the close collaboration between the domestic RU and the Czech road haulage companies. The main operators in the neighbouring countries – Kombiverkehr (DE) and ICA (AT) – are not only shareholders with 20% each, but also the most important foreign partners on the routes towards Western and Southern Europe.

The initial range of single wagon business moved towards full trains using accompanied CT, between České Budějovice (CZ) and Villach (AT) from 1993 to 1999 and between Lovosice (CZ) and Dresden (DE) between 1994 and 2004. The liberalisation of road haulage brought about by the EU's eastward enlargement in 2004 led to a serious loss of interest from road haulage companies in this second Rolling Road, even though it was handled effectively at the request of the States in question. All of a sudden, Bohemiakombi lost 96% of its shipments and had to come up with other activities in this new setting. It quickly became apparent that only unaccompanied CT had any chance of succeeding. In 2005, Bohemiakombi launched a new full train with Kombiverkehr, under the name of the Bohemia Express, which was seen as the most promising service available for the liberalised market.

The Bohemiakombi course is a good example of how the CT market has developed, from the single wagon to the full train and also from the accompanied to the unaccompanied form, at the same time as transport policy switched from a regulated to a liberalised concept. Overhauls of this kind were not easy for anybody - they required understanding by the RUs for continental traffic and involved investments in stackable equipment for clients.

In addition to bilateral services, Bohemiakombi provides the connection between the European network of operators' full trains and the Czech network. The Bohemia Express product now includes direct shuttles between Lovosice and Duisburg, Hamburg – Billwerder (DE) and also Trieste (IT). As far as the

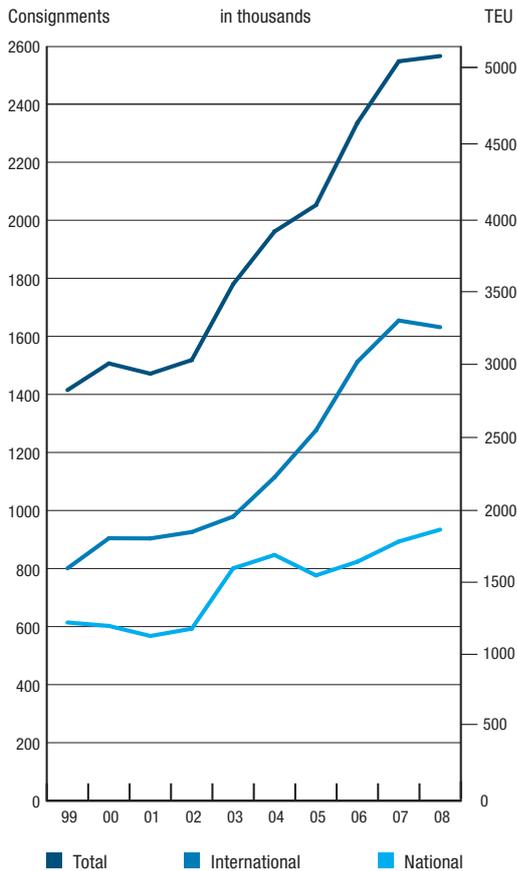


East is concerned, it sends shipments from Lovosice by rail from and to the terminals in Moravia, Poland, Austria, Hungary and Slovakia or, at the shipper's requests, forwards them to the end customer by road.

Bohemiakombi's long-term strategy is that of a neutral operator focussing on continental CT in the Czech and Slovakian markets. Bohemiakombi has been the only Czech member of the UIRR since 1996; the aim of this link is to bring about stable co-operation with reliable partners in Europe in order to benefit both road haulage companies and forwarding agents.

# THE YEAR 2008 IN BRIEF - TRENDS

## UNACCOMPANIED CT 1999-2008



Unaccompanied Transport (Consignments)

Year	International	National	Total
1999	800,624	614,183	1,414,807
2000	904,339	602,314	1,506,653
2001	903,708	567,642	1,471,350
2002	925,742	592,731	1,518,473
2003	978,915	800,612	1,779,527
2004	1,114,364	846,775	1,961,139
2005	1,275,927	776,318	2,052,245
2006	1,512,370	823,406	2,335,776
2007	1,654,553	893,106	2,547,659
2008	1,631,593	934,087	2,565,680

The unaccompanied transportation of swap bodies, containers and semi-trailers saw two very different developments over the course of 2008: very high rates of growth in the number of shipments over the first six months of 2008, followed by sharp drops caused by the first effects of the economic recession which arrived in the second six months of the same year.

Even so, in total unaccompanied transport managed to record growth of almost 1%, i.e. up on 2007 by 18,000 shipments.

International unaccompanied transport – which has been the main driving force behind the growth in Road-Rail CT for more than 30 years – had a rather difficult, tense year which led to a very slight 1% fall in traffic, i.e. 23,000 fewer shipments than in 2007. Transalpine traffic, which accounts for more than three-quarters of the total volume, suffered particularly from the reduction in economic trade across Europe: -14% on the route between Belgium and Italy (30,000 fewer shipments than in 2007), -13% on the route between France and Italy (i.e. 8,000 fewer shipments) and -2% on the routes connecting Italy and Austria/Denmark/Netherlands/Sweden (i.e. a total of 4,000 fewer units). On the other hand, the key route between Germany and Italy, which alone accounts for almost 500,000 shipments, did see a slight rise (1%). Traffic to and from the Iberian Peninsula suffered from recurring problems on the French network: -13% on the route between Belgium and Spain (i.e. 3,000 fewer shipments than in 2007) and -7% between Germany and Spain (i.e. this was also 3,000 fewer shipments than in 2007). Even so, there were some notable increases over the course of 2008, especially for the transportation of maritime containers to the hinterland, e.g. between Belgium and France (+38%, 16,000 shipments more than in 2007), between Germany/Austria and the Netherlands (+6% and +48% respectively) and between Germany and the Czech Republic (+17%).

As for domestic unaccompanied CT, it has increased by 5% i.e. 41,000 shipments. The introduction of fast, regular shuttle trains between the ports and the hinterland helped to bring about a noticeable increase in volume in France and Slovenia (in this latter case through the introduction of a third pair of trains between the port of Koper and the terminal gateway in Ljubljana as part of the Marco Polo SEEIS project). In addition to this, the increase in continental CT services connecting the major economic areas in Germany and in Switzerland has also contributed to this positive result. It should be noted that the restructuring of the Italian combined market somewhat shook the confidence of CT customers and this led to quite considerable disruption of Combined Transport activities throughout the year.

## ACCOMPANIED CT 1999-2008



Accompanied Transport (Consignments)

Year	International	National	Total
1999	358,111	48,099	406,210
2000	385,643	74,777	460,420
2001	382,964	82,589	465,553
2002	376,512	87,922	464,434
2003	377,348	82,308	459,656
2004	312,329	69,786	382,115
2005	271,311	44,369	315,680
2006	282,064	99,911	381,975
2007	262,255	127,628	389,883
2008	265,765	163,180	428,945

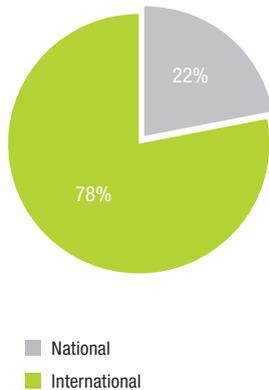
Thanks to strong, justified political support, the overall performance of accompanied CT was highly satisfactory in 2008, i.e. growth of 10% which means 39,000 shipments more than in 2007.

The traffic handled by UIRR companies offering international accompanied CT routes is up 1%, i.e. 3,000 additional shipments, thanks to factors including the first effects of the introduction of a large-scale commercial initiative between Austria and Hungary (the Marco Polo RoMo-Net project) and also to the strengthening of the existing high-performance links between Germany and Italy. On the other hand, the gradual move by the Slovenian CT market towards services based upon unaccompanied transport is still reducing the number of accompanied transport operations (-6% between Slovenia and Austria, i.e. 6,000 fewer shipments than in 2007).

Domestic accompanied CT had a remarkable year with a 28% increase, i.e. 36,000 additional shipments, as a result of exceptional growth again in Austria, a country whose government has always strongly defended the development of this Combined technique.

# THE YEAR 2008 IN BRIEF - TRENDS

## TOTAL TRAFFIC (IN TKM)



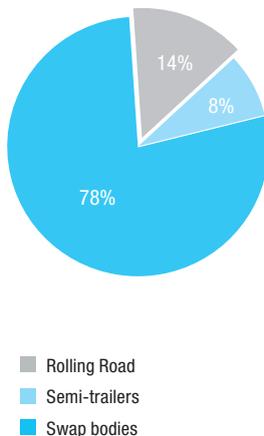
International and National traffic in Mio TKM

Year	International	National	Total
1999	20,742	7,846	28,588
2000	24,330	8,156	32,486
2001	24,663	7,217	31,880
2002	25,027	8,047	33,074
2003	25,248	7,671	32,919
2004	26,173	8,338	34,511
2005	28,871	8,086	36,957
2006	35,558	9,836	45,394
2007	36,273	9,796	46,069
2008	35,722	10,249	45,971

The rise in the number of international accompanied CT consignments (the gross weight of which is close to 30 tonnes and the average distance travelled approximately 480 km) was unable to compensate for the reduction in shipments sent by unaccompanied CT (lighter units weighting approximately 20 tonnes transported over longer distances of around 920 km). As a result of this, the trends in traffic, expressed in tkms, saw a slight fall internationally (-2%). The main reasons for this drop are the contraction of certain volumes transported relating both to Italy (-14% to/from France, -17% to/from Belgium), and to Spain (-17% to/from Belgium) along with so-called hinterland transport operations which are down above all between the ports of Germany and Hungary (-21% compared to 2007) and between the port of Koper (Slovenia) to Slovakia (-46%). Even so, we must underline a few remarkable results recorded in this type of market segment: Germany-Italy (+4%), Austria-Netherlands (+70%) and France-Belgium (+23%).

Thanks to a noticeable increase in the number of consignments, domestic traffic expressed in tkms is up 5%, essentially due to the increase in the frequency of existing services and/or the introduction of new gateway services especially in Germany, Austria, France and Slovenia.

## TECHNIQUES



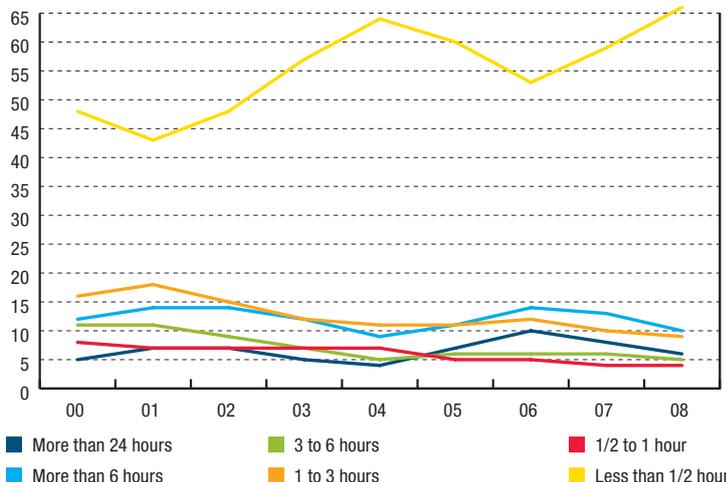
Proportion of CT techniques in total traffic in thousand consignments

Year	Swap bodies	Semi-trailers	Rolling Road	Total
1999	1,260	154	406	1,821
2000	1,333	172	460	1,964
2001	1,300	171	466	1,937
2002	1,367	152	464	1,983
2003	1,405	145	460	2,010
2004	1,806	155	382	2,343
2005	1,978	164	316	2,458
2006	2,136	200	382	2,718
2007	2,327	221	390	2,938
2008	2,319	247	429	2,995

In 2008, unaccompanied CT accounted for 86% of the total number of consignments made. This percentage breaks down into 78% for swap bodies and maritime and inland containers (a slight drop compared to 2007) and 8% for semi-trailers (unchanged compared to 2006 and 2007). Internationally, unaccompanied CT accounts for more than 1.5 million consignments carried out with swap bodies and containers (a 3% fall compared to 2007 following a reduction in the use of long units) in addition to 180,000 consignments with semi-trailers (up 6% thanks to increased use of this type of unit on the routes available between Germany and Austria/Italy). Domestically, the unaccompanied transportation of swap bodies grew by more than 3% with an even greater rise for semi-trailers (+33% compared to 2007) especially in Germany and Switzerland.

In accompanied CT, the sharp rise in the number of domestic consignments (163,000 in total, i.e. +28% compared to 2007) combined with a slight increase in the number sent internationally (totalling 266,000 consignments) and a fall in the overall volume of unaccompanied transport allows this rolling road technique to increase its share by a point (up from 13% in 2007 to 14% in 2008).

## PUNCTUALITY



For the last 10 years, the UIRR Office has been gathering detailed, consolidated data on the main European CT lines about the punctuality of unaccompanied international combined transport trains. Fortunately, the improvement in punctuality which had been seen in 2007 continued in 2008. Indeed, out of 22,000 trains checked in 2008 (8 major European axes, although without incorporating figures for the Brenner Pass), 66% of trains were on time, which is a 7-point improvement compared to 2007, 21% were late by more than 3 hours (a 6-point reduction compared to 2007) and 6% by more than 24 hours (a 2-point fall). This improvement was found on almost all of the lines which underwent 'quality' control, including the Gotthard Tunnel. The credit for this encouraging result goes to the networks which also showed a determination to restructure 'Product' groups on each of the lines in question thus allowing a more precise collection of data, an analysis of the causes and work carried out more efficiently than in the past.

Even so, we must temper the enthusiasm which these 2008 figures might arouse in consideration of the fact that a good number of international trains which were very late had to be cancelled by the operators, which had the effect that this statistic does not completely reflect the reality.

# THE YEAR 2008 IN BRIEF

## UIRR and European policy

The development of traffic and the UIRR strategy for the coming years were discussed at the Ordinary General Meeting held in Portorož (Slovenia) on 5<sup>th</sup> June 2008. With regard to this latter point, the decision was taken to continue and even possibly to strengthen the constructive interaction between the activities involving the promotion of CT and those relating to participation in European projects.

Interunit, the association of railway undertakings (RUs) which are members of the GTC/UIC and UIRR operators, held its General Committee meeting in the same context as the UIRR OGM. The discussions essentially dealt with reinforcing the partnership between these two professional organisations. The temporary abandonment of the Quality Label project and the presentation of the final report on the DIOMIS project, along with the strategy for its implementation, were major points of discussion. The meeting was also an opportunity to offer a reminder of the very real concerns caused by hazardous attempts at liberalising the weights and dimensions of road vehicles.

The following day, the UIRR Congress, the subject of which was “Achieving greener mobility in South-Eastern Europe”, was honoured by the presence of the President of the Republic of Slovenia, Dr D. Türk. In his opening address, he reminded the very many attendants of the major role played by the UIRR member companies in working towards sustainable mobility.

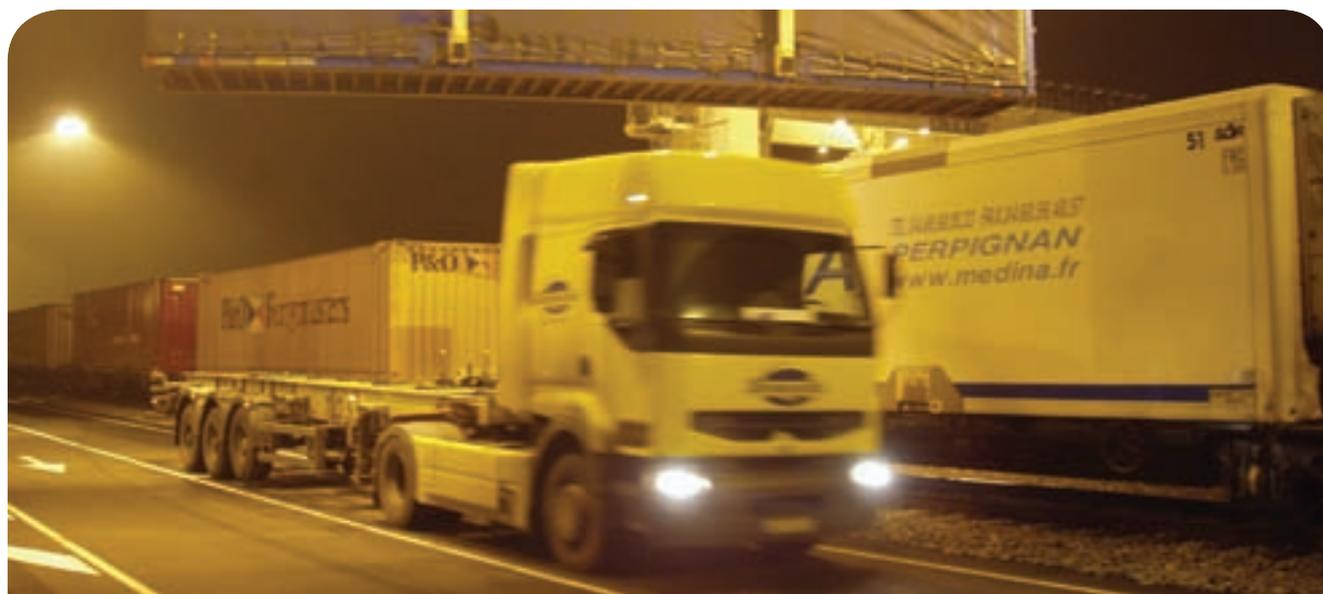
One of the year's key events was the appointment of Mr Antonio Tajani as Vice-President of the European Commission with responsibility for Transport. He thus succeeded Mr J. Barrot, whose remarkable political will was greatly appreciated, and with whom the UIRR enjoyed a constructive relationship throughout

his term of office. The frequent exchanges with the European Commission and the European Parliament dealt particularly with matters such as the quality of rail services, infrastructures, the question of the weights and dimensions of road vehicles, cabotage, freight corridors and the internalisation of external costs. On this latter point, the package relating to the greening of transport presented by the Commission in July picked up on a number of ideas which the UIRR has been supporting for a long time, such as switching from the “user pays” to the “polluter pays” principle in order to create – amongst other things – fairer intermodal competition.

The UIRR Office has continued with its wide-ranging activities relating to European projects in the fields of the security of goods transport (COUNTERACT), the optimisation of the logistics chain (BELOGIC) and the development of a long-term vision for sustainable transport (FREIGHTVISION).

The UIRR has remained active in representing freight customers in dealings with the European Rail Agency (ERA) – of which Dr János Berényi is Vice-Chairman – where it sends experts to numerous task forces mainly dedicated to interoperability with a view to a harmonised European rail market.

The UIRR has made contributions to many projects run by the CEN where it chairs the technical committee on the standardisation of swap bodies. Finally, the CESAR company's – hosted by the UIRR office – tracking & tracing system now has more than 400 regular users and already covers over three-quarters of UIRR consignments.



# THE YEAR 2008 IN BRIEF

## Operational organisation of member companies

For a second consecutive year, and in spite of a sharp drop in demand in the fourth quarter as a consequence of the economic crisis, **Kombiverkehr** has again improved its record in terms of shipments since it was set up, thus preserving the environment from 993,000 tons of CO<sub>2</sub>. The German operator has also reacted to the crisis by increasing the flexibility of its range of products and services in order to adapt it to current demand, which required intense negotiations with the railway undertakings. The other strategic measure consisted of reducing the frequency of certain trains rather than cancelling whole links.

Against this background of falling demand, **Hupac** has warned infrastructure managers and haulage operators against unreasonable price rises. Indeed, these could be fatal to goods transport by rail.

**ICA** seeks to react to the crisis firstly by contracting its range of products and services and secondly by improving the exchanging of information with its clients in order to increase the quality of the services provided further.

In line with Italian legislation, **Cemat** has split off from its terminal company branch which now belongs to Terminali Italia srl, controlled by RFI.

Thanks to a new pricing system, **Eurotunnel** has recorded a slight increase in its tonnage transported, even in spite of the fire outbreak in September 2008, and was able for the first time to pay a dividend to its shareholders.

**Ökombi** obtained ISO 9001 and ISO 14001 certifications for its quality and environment-related management systems respectively. The Austrian operator has also launched a programme

involving the modernisation of all of its sleeping cars which should be completed in 2010.

**Hungarokombi** has been engaging in effective lobbying of the Hungarian Authorities and obtained a temporary subsidy to get it through the period of transition towards fairer framework conditions designed to promote an environment-friendlier mode of transport, i.e. the railways. As part of the RoMo-Net project supported by the European Commission's Marco Polo programme, the Hungarian operator and **Ökombi** have developed a synchronised booking system, and also a shipment tracking system which includes displaying the estimated time of arrival. The information is available to clients online and in sleeping cars for road haulage drivers.

**RAIpin** has recorded the 500,000<sup>th</sup> lorry carried on its Rolling Road service between Fribourg (CH) and Novara (IT) since it was set up in 2001.

By controlling its railway production operations, **Naviland Cargo** has managed to redirect its resources especially on the line between Vénissieux (F) and Antwerp (B), in line with the choices made by its clients and thus standing out from its competitors.

**Polzug Intermodal** has recorded satisfactory results with its strategy of services operating out of the North Sea hubs to Russia, the Ukraine and Central Asia, and is counting on its Silk Road Express Georgia subsidiary to make the most of the potential of the market in the Caucasus.

**TRW** now uses the services of ECR as traction provider in France and those of SBB-Cargo Italia in Italy.



# THE YEAR 2008 IN BRIEF

## Development of CT services

As part of the SEEIS project which is supported by the European Commission's Marco Polo programme, **Adria Kombi**, **Cemat**, **Kombiverkehr** and **Rocombi** have started their work with a view to linking Bucharest (RO), Sofia (BG), Istanbul (TR) and Salonika (GR) to Western Europe with Ljubljana (SI) as the turntable. For traffic both to and from Turkey, Europe Intermodal, set up by **Kombiverkehr** and **Adria Kombi**, saw its first CT train on the tracks in March, thus linking the terminal in Halkali (Istanbul, TR) to both operators' full train networks.

Following successful tests, **Kombiverkehr** entered the controlled-temperature goods transportation segment, especially for the links between both Ludwigshafen (DE) and Budapest (HU), Bremen (DE) and Verona (IT).

**Hupac's** traffic between Duisburg (DE) and South-Eastern Europe saw the introduction of a new operational concept in mid-December, with daily direct lines to Vienna (AT), Enns (AT), Krems (AT) and Budapest (HU). **Hupac** is also preparing new transport solutions via the Löttschberg tunnel for the semi-trailers segment and has launched a link between Taulov (DK) and Verona (IT) via the Brenner Pass, in partnership with **Cemat**. The Italian operator has been developing its own range of services between Italy, Belgium and Luxembourg since late 2008.

In October **Ökombi** launched a service between Wels (AT) and Spačva (HR) in partnership with **Crokombi** and, at 808 km, this is the longest Rolling Road link in Europe.

**ICA** is now offering a regular service between Graz (AT) and Koper (SI) with five departures a week in each direction and is intending

to develop new services between Austria and Romania, Poland and Serbia. A considerable breakthrough to the East has been made with the new range of products and services developed with other partners which provide a link to China in 20 days.

**Novatrans** has reactivated the France/Italy axis notably through the launching of a direct train between Valenton (F) and Vercelli (IT).

**TRW** has introduced a new service between Ljubljana (SI) and Zeebrugge (B), as well as a line between Anvers (B) and Le Boulou (F). Despite the crisis, the Belgian operator has worked towards the starting-up of services between Belgium and Central and Eastern Europe (i.a. Romania, Czech Republic, Hungary, Bulgaria).

### Terminals

**Polzug Intermodal** has opened a 45,000 m<sup>2</sup> terminal in Wroclaw (PL), which is Poland's fifth largest city. This transshipment yard is equipped with four tracks and able to handle up to 2200 TEU; daily links will be provided by full trains to the ports of Hamburg (DE), Bremerhaven (DE) and Rotterdam (NL).

**Novatrans** has ordered two gantry cranes for the Perpignan (F) exploitation site and three tractor cranes for those in Valenton (F), Le Havre (F) et Avignon (F).

**Hupac** has continued with the work on the construction of a terminal in Antwerp (B) and also with the extension of the one in Busto-Arsizio (IT).



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