



2013: a year of growth

European road-rail Combined Transport closed a year of 3.84% growth in number of consignments, and 4.25% in terms of tonne-kilometres. The UIRR CT Sentiment Index signalled a mixture of neutral outlook and cautious optimism throughout the year, which reflects the fragility behind this growth.

CT Operators and Terminal Managers of UIRR are aware of the uncertainties that linger around the economic recovery fuelling this growth, as well as they are conscious of the several uncertainties that may have consequences on the competitiveness of the CT offering, which reflects in the sentiment going forward.

The European Parliament adopted its first reading positions, in the first quarter of 2014, on both the Fourth Railway Package and on the Weights and Dimensions of Commercial Road Vehicles. The positions taken on the Technical Pillar of the Fourth Railway Package and the Weights and Dimensions Directive were positive; nevertheless UIRR was disappointed by the development of the Governance Pillar in the EP Plenary, which - under pressure of some incumbent railways - reversed the more ambitious positions taken by the TRAN Committee to eliminate "privileged relationships", which prevail within vertically integrated (incumbent) railway undertakings.

Approval of the Shift²Rail research and development initiative also came at the end of the EU legislative period, all receiving the endorsement of European CT Operators and Terminal Managers. UIRR is an active supporter of Shift²Rail.

The outgoing European Parliament, alongside its co-legislator, the European Council, have left some very important unresolved dossiers as a legacy to their successors: the revision of the fuel excise duty directive, and the transformation of the Eurovignette Directive into the eToll Directive, mandating the implementation of distance based electronic road tolling.

The United Kingdom must be acclaimed for the announcement of its Strategic (Rail) Freight Network Enhancement Scheme, which came just about the same time as Eurotunnel's decision to halve charges of freight trains for using the Channel Tunnel. Both actions should contribute considerably to the competitiveness of rail freight in Great Britain.

Ahead of the election of the new European Parliament and the appointment of the new College of Commissioners expected later this year, the extensive range of leadership changes at DG MOVE, the European Ministry of Transport, needs to be noted. The transfer of Director General Matthias Ruete, and his succession by João Aguiar Machado, as well as a number of directorial appointment must be mentioned. All changes are listed on p.8.

UIRR welcomed new members for the first time in some years with the joining of Far East Land Bridge (FELB), Lugo Terminal and Trans Eurasia Logistics (TEL).

Ralf-Charley Schultze - Director General

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Business outlook for
the 12 months between
1 April 2014 – 31 March 2015



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www.destiny-project.eu

EP vote on the Fourth Railway Package

26 February 2014

The European Parliament acted along the European Commission's notion, and kept the Fourth Railway Package together by holding its plenary on every component of the Package on 26 February.

The European Council matched this effort by concluding its position on the third and final component of the Technical Pillar, the European Railway Agency Regulation on 14 March. The Greek Presidency continued with opening both remaining dossiers, the Governance and on Public Services, which will hopefully be concluded under the Italian Presidency by the end of 2014.

The EP Plenary's first reading position on the Technical Pillar saw the confirmation of the compromise reached in the Transport Committee. Subsequently, safety certification of railway undertakings, and vehicle certification for all sorts of rolling stock will be carried out in a homogeneous process by the European Railway Agency (ERA).

The imposition of European rules into national law, the specific safety rules adopted on Member State initiative, bilateral agreements and the specific actions of national regulators will all come under ERA review. The resources granted by the legislators to the Agency will only be sufficient if these tasks are performed and the bilateral agreements foreseen to be concluded between the national safety authorities and ERA become a success.

EP position on Weights & Dimensions

15 April 2014

The European Parliament adopted its first reading position on the amendment of Directive 96/53 concerning the weights and dimensions of commercial road vehicles.

Main topics of this legislation extend from the 15cm extension of maximum length of semi-trailers transporting intermodal loading units, needed to enable the use of rectangular 45-foot pallet-wide swap-bodies/containers, to aerodynamics improvements to cabs and protruding (rear) aerodynamic devices, through to the circulation of megatrucks.

Strangely, the European Commission included in this piece of legislation a new definition of "intermodal transport" and a special rule linked to it to benefit shortsea shipping.

UIRR, as a prime stakeholder, issued a position paper (<http://www.uirr.com/en/media-centre/press-releases-and-position-papers/2013/mediacentre/578-weights-and-dimensions-should-aid-modal-shift.html>) and presented it vigorously at various events and one-on-one meetings during the debate of this important dossier.

Following the adoption of the EP Plenary's first reading position, it may be noted that several observations of UIRR were taken on board by the legislator:

The Governance Pillar did not fare as well in the EP Plenary, as both of its important components were considerably weakened by last minute amendments:

- The homogenisation of tasks and responsibilities of rail infrastructure managers irrespective whether they are independent, or functioning as part of a vertically integrated holding company, and
- The Chinese Wall that was foreseen to be erected high and wide to separate infrastructure managers from railway operators of incumbent holding companies.

The Transport Committee compromise was reversed on several points, effectively undoing most progressive proposals made by the European Commission in an effort to create transparency and comparability, as well as to weaken the privileged relationships enjoyed by incumbent railway undertakings that belong to vertically integrated holding companies.

Presently, all eyes are upon the European Council, which is yet to express its views on the Governance Proposal, in a hope to rescue at least some of the constructive components of the original Commission Proposal. UIRR maintains its position that both homogeneously structured rail infrastructure managers and a firm Chinese Wall within incumbent holding companies are essential to improve the quality performance and competitiveness of the European railway sector.

- Protruding, yet foldable rear mounted aerodynamic devices will have to be fully CT compatible,
- The prevailing rules affecting cross-border circulation of megatrucks will not be changed,
- The definition of 'intermodal transport' shall be relegated to the revision of Directive 92/106 alongside with any related benefit rule.

Problematic positions that remain unsettled concern the allowance for front cab length increase (related to aerodynamics and safety improvements), the limitation of 44t maximum gross weight to trucks performing CT positioning legs, and the removal of ambiguous language related to megatrucks.

The European Council is presently deliberating the text with a view to possibly conclude its first reading position as early as by the June meeting of the Transport Council. In the meanwhile, UIRR members have sent letters to their respective national transport ministries to inform them of the opinions of European Combined Transport. Any differences in the positions of the two legislative bodies will be resolved in three-party talks that could commence the soonest in the Autumn of this year.



Adoption of the Shift²Rail initiative

March-April 2014

Both EU co-legislators, the Council and the European Parliament have decided to adopt the Shift²Rail Initiative on 14 March and 15 April respectively, as well as the European Economic and Social Committee has granted its endorsement.

Traditional instruments of the EU Framework Programme do not allow for the establishment of long-term, integrated research projects, being mainly used by the rail sector for investigator-driven and short-term problem solving research and are based on the principle of open proposals through the launch of calls. They tend to result in fragmented research activities having difficulties to reach the innovation stage, whereas Shift²Rail offers an adapted frame for industrial innovation up to the demonstration phase and allows for better conditions of planning and budgeting. Named beneficiaries will have the reassurance that, with guaranteed long-term direct funding, it will be possible to streamline the innovation process from initial research to deployment of the innovative solutions on the railway system. Such an approach would enable a better integration of technologies in test demonstrators to ease and speed their uptake by the market. Also, the creation of a Joint Undertaking structure for Shift²Rail with dedicated staff will create a fast-acting and efficient administration service in a competitive industrial environment.

Public funding is essential as the research activities of Shift²Rail cover critical topics on which the investments of one company alone would be too risky. The initiative will result in the development of highly standardised product interfaces, which will benefit to end users and public authorities thanks to the easier integration of new technologies into the system with significant economies of scale. Such standardisation activities cannot be undertaken by one single supplier alone without the support of public authorities.

Problems in the EU's climate policy?

April 2014

Climate change, a harmful byproduct of human activities, is almost impossible to effectively tackle on a country-by-country level. The coordination of the European Union in this aspect is essential if Europe is to achieve meaningful progress.

The EU's agreed energy enhancement targets to be reached until 2020 is "3 x 20%": 20% reduction of CO₂ emissions, 20% improvement of energy efficiency, and 20% ratio for renewable energy sources in production on the basis of 1990.

The Coalition for Energy Savings (CES), representing 150 companies and 400 associations, in a recent report pointed to severe shortcomings: Member State level energy efficiency plans seem to be not more than the expression of intentions, the improvements achievable through which have been frequently overstated. As many as 13 Member States provided incomplete action-plans, while others were reported to be downplaying the



Three key objectives have been identified by the initiative:

- Enhancing the Capacity/User demand of the European rail system,
- Improving the Reliability/quality of service of the European rail system, and,
- Reducing the Lifecycle costs and improving the competitiveness of the European Rail system.

Shift²Rail aims to achieve these objectives through a structured research plan. It will perform its activities into Research Innovation Programs, interdependent core of research tasks which cannot be fragmented without detriment to the overall objectives of the initiative. The five Innovation Programmes (IPs) and their proposed innovations are:

- IP1 - Energy & Mass Efficient Technologies for High Capacity Trains
- IP2 - Advanced Traffic Management & Control Systems
- IP3 - Cost efficient - High Capacity Infrastructure
- IP4 - IT Solutions for a Seamless Attractive Railway
- IP5 - Technologies for Sustainable and Attractive European Freight

UIRR is a supporter of the Shift²Rail initiative, and will partner with the 125 other involved organisations to contribute to making it a success for rail freight.



importance of these commitments.

A 40% cut in CO₂ emissions (on a 1990 basis) is recommended to be agreed for 2030, however, Member States continue to deeply differ on the path to follow. Excessive CO₂ emissions quotas issued mean that emissions rights cost barely €5 per 100t rather than the €30 that would be necessary to motivate the changes needed.

Transport, chronically lagging in both proportional energy efficiency and CO₂ emissions, continues to be a major culprit in achieving the jointly agreed targets.

UIRR remains convinced that unless the excessive road haulage is replaced - through modal shift - by sustainable modes of transport, such as electric rail, inland navigation and shortsea shipping, the EU's climate change targets will be unattainable (to the detriment of society at large).

UK Rail Freight Network Enhancement Scheme

December 2014

Understanding the need for more rail freight, and the infrastructure deficiencies behind the relatively weak market position of rail freight within the transport mix of the United Kingdom, Network Rail has completed several enhancement projects during Control Period 4 (CP4) that ended in 2013. Significant number of additional projects - dedicated to rail freight in particular - are planned in CP5 that commences this year (for details click):

[file:///C:/Users/AE/Downloads/DefinitionOfProposedCP5Enhancements\(14-10-2011\).pdf](file:///C:/Users/AE/Downloads/DefinitionOfProposedCP5Enhancements(14-10-2011).pdf)

The 22 projects focused on profile gauge extensions, train lengthening and general capacity increasing will create the setting needed to grow UK rail freight in the foreseeable future considerably.

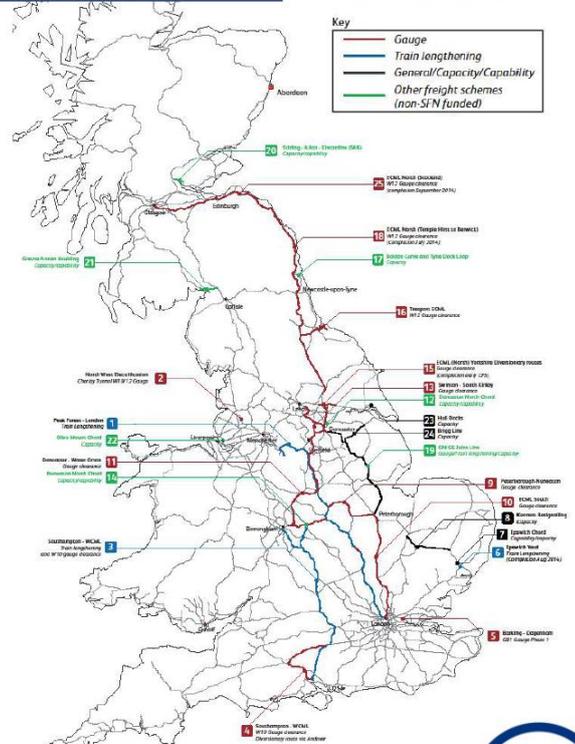
The measure of Eurotunnel, which recently announced a substantial access charge cut (see article below), coupled with the recent opening of the renovated and enlarged DP World London Gateway which recently began receiving train services from the Continent.

UIRR has been emphasizing the need to develop the infrastructure necessary to facilitate rail freight and CT in particular, especially through the elimination of bottlenecks that in certain cases outright prevent the offering of competitive services to the market. The UK and Network Rail is clearly taking the necessary measures in the right direction.



Completed rail works through CP4

Network Rail has outlined its completed projects in CP4, enhancing the network to carry more freight traffic and make rail freight more competitive with other modes. By 2024 demand is expected to grow by 30%, the equivalent of 240 extra freight trains a day, and by as much as 140% over the next 30 years. ■



Strategic Freight Network Enhancement Schemes
Foundation for future growth

May 2014

Eurotunnel rail freight charge reduction

6 November 2014

The Eurotunnel Group announced the reduction of the access charges levied on trains using the Channel Tunnel in the off-peak periods by 25% as compared to the 2013 levels. Moreover, the company pledged to freeze this rate until at least 2018. These time slots are typically filled by the 5,000 freight trains that pass through the Tunnel in any one year.

Eurotunnel hopes that the measure, which is to take effect from June 2014, will double the current number of freight trains that pass through its infrastructure from the present level to 10,000 trains a year by 2018. UIRR has long been advocating the stability and the predictability of track access charge changes, which Eurotunnel has clearly understood.



Romania: new excise duty harms CT

1 April 2014

With the change of Romania's Fiscal Code that took effect on 1 April 2014 a new tax on oil derived products amounting to 7 eurocents per litre was introduced. While several transport stakeholders were consulted prior to its introduction to agree on mitigation measures of the adverse effects, railway carriers were missing from those consulted.

Subsequently, road hauliers operating commercial vehicles heavier than 7.5t are offered a partial rebate (4 cents per litre), which was not reciprocated towards rail freight operators. This discrepancy clearly exacerbates the competitive imbalance already in place favouring truckers. UIRR is convinced that only European level legislation can prevent such occurrences.



UIRR issued a position paper upon the tabling of the Commission proposal to update and recast Directive 2003/96 concerning European energy taxation in 2011 [<http://www.uirr.com/en/media-centre/press-releases-and-position-papers/2011/mediacentre/478-uirr-on-energy-taxation-directive.html>].

The Commission's reasoning was supported, more transparency and the necessary internalisation measures in energy taxation were called for. Most unfortunately the European parliament and the Council have yet to begin deliberation of this very important legislative proposal; UIRR strongly hopes that with the end of the economic crisis the adoption procedure will ultimately begin by the new European Parliament this year.

New member: Far East Land Bridge

[<http://www.fareastlandbridge.com/>]

Far East Land Bridge [FELB] operates container trains via the Trans-Siberian Route to connect Europe with China, South Korea and even Japan since 2007. In 2011 the company reached the level of 7,000 containers transported, based largely on the company's own stock of thousands of containers.

One of the main advantages offered, is the short transit time compared to the sea freight performance. The transit time depends on container volume per shipment and routing. Basically the average transit time for single container is about 24 days, and for block-train shipments about 22-23 days.

The core business of providing terminal to terminal CT transport services, FELB's shipments pass via the border station Manzhouli/Zabaikalsk and Brest/Malaszewicze (on the northern route) or Dobra/Chop (on the southern route) in Europe.



FELB offers a daily tracing information, which is sent in an email form. For high value goods, or if requested by the client, GPS monitoring systems are used.

FELB is headquartered in Vienna, with offices in Nürnberg, Shanghai and Beijing. The company is part of the RZD Group.



New member: Lugo Terminal

[www.lugoterminal.com]



Lugo Terminal is the manager of two transshipment terminals in Italy, which also offer an extensive range of logistics services at two locations: in Lugo (190,000m²), to the east of Bologna, and in Giovinazzo (34,000 m²) in Southern Italy.

Lugo offers depot space for 3,200 TEUs - awaiting their loading on either of the 8 tracks that it offers, while Giovinazzo can house up to 1,500 TEUs destined to or coming from its 3 railway tracks.

The 11 tracks on offer at the two terminals altogether translate to 11km of rail, from where regular train connections are offered to a range of West, Northwest and Eastern destinations ranging from Lyon in the West, Belgium in the North and Moscow in the East.

New member: Trans Eurasia Logistics

[<http://www.trans-eurasia-logistics.com/>]

Rail-bound freight transport between Europe, the CIS and Asia has become increasingly important as transport costs have risen and environmental awareness has grown. In light of this, Deutsche Bahn AG and the Russian Railways (RZD) founded Trans Eurasia Logistics GmbH (TEL) in early 2008.

TEL transport solutions are ideal for almost all freight that can be transported by rail, especially valuable and heavy freight.

As a high-performance company, TEL offers products that are efficient and innovative - and at market-driven prices. Using the networks of partner companies TransContainer, Polzug and Kombiverkehr, TEL is a reliable partner for international rail-bound freight transport.

TEL operates from offices in Berlin, Moscow and Beijing.



Besides regular services between Chongqing and Duisburg, Rotterdam and Antwerp (16 day journey time), in August 2013 TEL successfully started its train services carrying 51 containers between Zhengzhou and Hamburg-Billwerder. The maiden journey, travelling along the Southern route through Kazakhstan, took just 15 days.



Operations Committee meeting

29 April 2014

Following a lack of meetings for some months, the Operations Committee of Interunit has been reactivated to hold a gathering on the 29 April 2014 in Paris (UIC offices).

Under the chairmanship of Mr. Lambert (CFL), the objective of the meeting was to define a detailed work

programme (morning session), to clarify the situation on the load securing tests within the DESTINY project (for more information see p.7), as well as to discuss the operational aspects of the aerodynamic devices (extension of the front cabin of the trucks and of the rear of the semi-trailers related to the presently ongoing revision of Directive 96/53).

Technical Committee meeting

25-26 March 2014

The TSI noise (and related revision), the activities of the ERA Freight Focus Group, the works on the registers and the ECM certification were discussed under legislative topics. For the registers the experts' intention is to use the upcoming RINF data (infrastructure register) to create a true European map of all CT codified lines. As RINF is not intended to be used in operations, the INTERUNIT map shall remain the reference document for the line codification for swap bodies and trailers. See here: <http://www.uirr.com/en/media-centre/leaflet-and-studies/mediacentre/66-map-of-the-railway-lines-in-ct-version-2013.html>.

The loading of intermodal loading units onto wagons should be optimised with the support of innovative IT applications. One concrete case was presented and discussed during the session. The final aim should be to develop a European wagon database with all wagon loading schemes.

The revision of the UIC leaflets related to CT, the European standards (CEN TC 119) and the GCU contract were also discussed. For the UIC leaflets the revision works are over and all revised leaflets have been published on the UIC's website in March 2014 (http://www.uic.org/etf/codex/codex-resultat.php?liste_parution=73).

CEN TC 119 committee was reactivated in November 2013 in order to start a series of new or revised standards (15 total). Particularly interesting is the new standard related to the craneable semi-trailers. The aim is to define a European craneable semi-trailer envelope in order to ease the construction of pocket wagons. A proposal has been drafted and shall be shortly submitted to vote.

Freight Focus Group meeting

29 January 2014

In December 2012, the freight sector published its final report on the results of the Joint Sector Group activities linked to the action plan defined under the Task Force 'Freight Wagon Maintenance' (link to the Viareggio accident). The sector proposed a series of possible measures among them the European Visual Inspection Catalogue for freight wagon axles (EVIC catalogue).

In order to trace the results on a Pan European Level, the JSG introduced a monitoring program based on the EVIC catalogue. From April 2010 to April 2012 more than 1.4 million axles and 375.000 freight wagons from 16 countries and 163 keepers have been checked in accordance to the EVIC criteria. The sector requested to stop the tracing of all axles as the EVIC catalogue has been now incorporated in the GCU rules and as the ECM certification is now mandatory. The attending NSAs underlined the positive effects of the EVIC catalogue and the efforts of the sector to find out an innovative maintenance framework. Therefore they also considered that the European sampling could now be abandoned.

The Agency explained the process foreseen for the revision of the Regulation 445/2011, concerning the system of certification of entities in charge of maintenance of freight wagons, which will cover not only new vehicles, but also freight wagons themselves. An impact assessment will be conducted to facilitate better-informed decision making throughout the legislative process and to provide information about consequences of Agency proposals.

As preparatory work, the Agency intends to start first with an ex-post assessment on the ECM certification based on the experiences and other considerations gathered so far. A questionnaire was launched in March to collect information from the stakeholders involved in the maintenance of railway vehicles. The results will be discussed at the next FFG meetings. Concerning the exact date for the revision of the Regulation 445/2011, it depends on the ultimate adoption of the Fourth Railway Package (2016 or 2018). Nevertheless, the FFG shall provide to the Commission not only a feedback on the implementation experience with Regulation 445/2011, but also with a possible improved maintenance system to be adopted by the freight stakeholders.



DESTINY Project update

April 2014

The DESTINY consortium (www.destiny-project.eu), coordinated by UIRR, focuses on the implementation of the revised EN13044 standard related to identification and codification of loading units (topics 1 and 2), as well as to assembling and disseminating industry best practice on load securing (topic 3) and the handling of dangerous goods consignments (topic 4).

Concerning topics 1 and 2, as the deadline approaches (1st July 2014), the partners intensified their dissemination activities (articles in the press, direct client communication). The partners will also develop specific IT applications such as specific web services for exchanging information on the ILU-Code Register or a mobile version of the ILU-Code website (m.ilu-code.eu).



In topic 3, the first results showed that road and rail standards prescribe different values for the various force parameters (vertical and longitudinal), which means that if goods are secured in a loading unit for road it may not be rail compliant (i.e. UIC loading guidelines require much more lashings than road). A risk analysis has been started in order to check whether the rail values could be adapted to those of the road.

In topic 4, the general informative leaflet is now available in nine languages: <http://www.destiny-project.eu/dangerous-goods-to4leaflet-in-nine-languages/>. The final conference will be held on 18 June 2014 in Brussels: http://www.destiny-project.eu/destiny_mail/

EcoHubs Project update

April 2014

The objective of EcoHubs (www.ecohubs.eu) is to support the terminals in their daily greening processes in particular by proposing to the terminal operators the adequate tools for assessing and measuring their carbon footprint. The project partners HaCon, KombiConsult and PE International are therefore developing the Intermodal Terminal Eco-efficiency Calculator (ITEC).

EcoHubs is also aiming at developing generic solutions for improving the overall efficiency of the terminals. Currently the partners Adria Kombi and IFB are in close cooperation with software houses to finalise their solutions. Specific apps will be developed to support the dispatchers of trucking companies to better organise the (port) road distributions and the truck drivers to improve the pick-ups and deliveries of loading units.

ILU-Code success story: Lannutti

April 2014

The glass-carrier specialist, Lannutti, began its ILU-Code compliance project with registering its ILU-Code owner keys in December 2012.

This was followed by deliveries of ILU-Code labels - ordered through UIRR's ILU-Code sticker service in 2013 and 2014.

Lannutti also obtained codification plates from the same source.

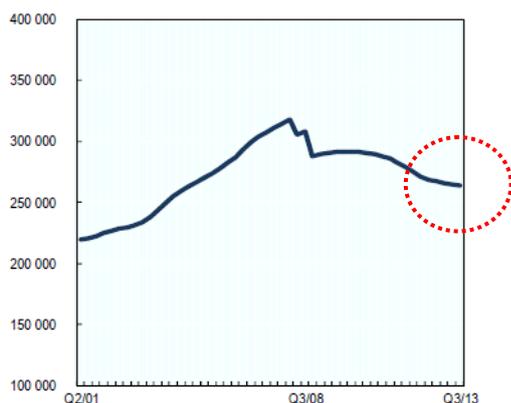
The company is projecting to be fully ILU-Code compliant by the 1 July 2014 deadline.



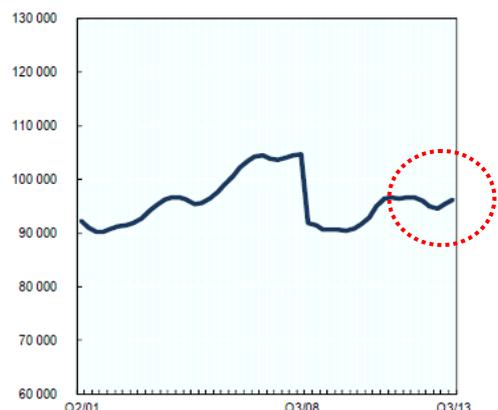
OECD / ITF Statistics Q3.2013

April 2014

Road freight in the European Union (Bn tkm)



Rail freight in the European Union (Bn tkm)



Recent Appointments

**TRANS EURASIA
LOGISTICS**
April 2014



Mr. Andre Hempel was appointed as managing director of Trans Eurasia Logistics (TEL). Mr. Hempel succeeds Ms. Sabine Bund who transferred in responsible position to the DB Group.

Over the last 12 years Andre Hempel was employed within the network of the DB group, thereof 10 years in responsible and executive position in the allied company DB Schenker BTT GmbH.

**DG MOVE
(EUROPEAN
COMMISSION)**
May 2014



Mr João Aguiar Machado has been appointed the Director General of DG MOVE, replacing Mr Matthias Ruete, who shifted to another position in the European Commission.

Mr Machado begun his career at the External Relations Directorate of the European Commission dealing especially in relations with Japan. Later he shifted to trade relations and became a Head of Unit in 1998 and a Director in 2004 at DG TRADE. Mr Machado fulfilled three assignments as a Deputy Director General before his appointment to DG MOVE.



Mr Olivier Onidi has shifted from Directorate C (Innovative & Sustainable Mobility) to become Director of Directorate B (European Mobility Network) from where he supervises the Trans European Network (TEN), the Single European Railway Area (SERA), Ports and Inland Navigation, and the development of the transport infrastructure.



Ms Magda Kopczynska, previously Head of Unit D.1 - responsible for maritime and intermodal transport - was named as the Director heading up Directorate C (Innovative & Sustainable Mobility) succeeding Mr Onidi. The new Head of Unit D.1 is yet to be chosen.

Members' News

RALPIN
28 February 2014

RAlpin carried the one millionth truck through Switzerland on 28 February 2014.
Click: <http://www.ralpin.ch/appl/file.php?id=637>

Key Dates & Events

5 June, Frankfurt Oder	European Logistics Conference
11 June, Bern	CIT's Customer and Customs Organisations Conference
12 June, Brussels	Innovation and Efficiency in Rail Freight: a UIP symposium
12-13 June, Prague	F&L 20-years Anniversary Event and Conference
18 June, Brussels	DESTINY Project Final Conference
24-25 June, Vienna	4th UIC Global Rail Freight Conference
26 June, Valenciennes	European Railway Agency 10-year Anniversary Event
1-3 July, Strasbourg	1st Plenary Session of the newly elected European Parliament
2 July, Brussels	CEFIC Stakeholder Conference
9 July, Berlin	COFRET Project Final Conference
23-26 September, Berlin	InnoTrans 2014 Fair and Conference



**INTERNATIONAL UNION
FOR ROAD-RAIL
COMBINED TRANSPORT**

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