

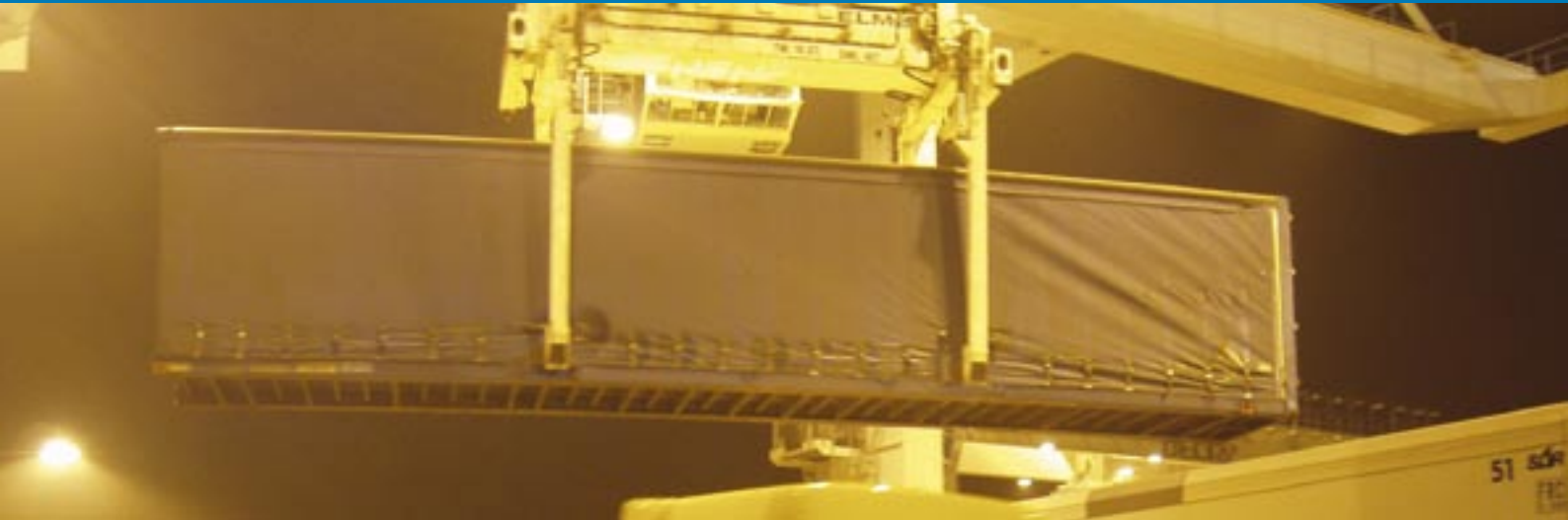


Report 2005 EN

International Union of combined Road-Rail transport companies

UIRR





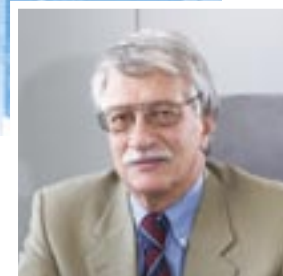
IMPRESSUM

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FOREWORD

Eugenio Muzio

Chairman of the Board

The year 2005 has proved fruitful for the UIRR and many of its members.

An excellent working relationship has been established with Mr. J. Barrot, Vice-President of the Commission and Transport Commissioner, who honoured us with his attendance at our Annual General Meeting Gala Dinner in June where he assured us of his intention to maintain the pivotal role of Combined Transport (CT) in view of a better freight modal split in Europe. Mr. Barrot confirmed this position during a further meeting with him, attended also by Mr. R. Colle and Mr. J.-L. Mélard from the UIRR, as well as his advisor, Mr. M. Sagredo, and Mr. J. Trestour, Head of Unit Intermodality of DG TREN, and declared to share our strong will and exclusive commitment to encourage freight transfer to rail, which requires more advanced interoperability and liberalisation, service quality levels which suit market requirements better and harmonised State aid on a European level.

The Commission is currently reviewing its White Paper on Transport, concentrating on three key issues i.e. development, protection and innovation. CT and, consequently, the UIRR play an active part in fulfilling these aims. The Commission needs, however, to adopt measures to this effect.

So will the ERA (European Railway Agency), which is responsible for formulating recommendations in the areas of safety and interoperability in view of the drafting of community legislation, play a fundamental role in integrating the European railway system and in drawing up operational parameters, which should be as uniform and as workable as possible. The UIRR called for the creation of a specific CT unit for the ERA to be able to act efficiently on CT-related issues.

Another important step was the signing of a common Agreement in July by the Chairman of the G.CT of the UIC and myself, which sets out the ground rules to be respected as far as quality for CT services is concerned, such as the responsible party's duty to compensate for shortfalls in services. The UIRR considers this document, the contents of which will be checked, as a first step towards the reliability required by the market.

Railway liberalisation was continued in 2005, enabling some UIRR members to invite tenders from several railway undertakings (RUs) for the provision of rail traction and to retain the most competitive international end-to-end proposal.

This new framework has also led numerous operators to review their own organisations in order to adopt the most profitable operations, to acquire shares in the capital of sister companies, to provide new international services or to tighten the working relationships with the RUs.

These developments demonstrate that the CT and the UIRR environments are undergoing significant changes which, if properly managed – as we are currently doing –, will lead to new and very promising results.

Eugenio Muzio



DYNAMISM OF UIRR

Rudy Colle

Director General

In 2005, the UIRR member companies handled a consolidated number of consignments that was appreciably higher than the corresponding 2004 figure. Why do we consider this result to be nonetheless satisfying?

Because the restructuring of an important member company in France led to a substantial reduction in its traffic which could not be recuperated by other members. Because the quality of service slightly declined again on various routes during the second half of the year, for reasons which seem in the meantime to be disappearing. Finally, because the EU enlargement had a further negative impact on accompanied CT also in the year 2005, with the effect that this form of road infrastructure relief lost a third of its number of consignments during the last 18 months.

Fortunately, unaccompanied transport has enjoyed a more than proportional increase, over 15% internationally and 9% in total.

This result can be better valued when comparing it with the overall UIC freight figures, which show a 1.5% decrease in 2005. This makes clear, if need still be, that it is through Combined Transport that the rail mode will regain market shares.

With its dynamism, main theme of this report, the UIRR intends to demonstrate that achieving success requires persistent efforts also in CT.

The "visible" part of the work may largely be awarded to our member companies' constant search for traffic in view of enabling them to launch new trains, and



hence benefit, and make their customers benefit, from economies of scale.

In 2006, we expect to see a larger boosting of CT, with the help of innovative services, vigilance as far as quality is concerned, or the possibility to choose the rail traction operator, an option which is still under-utilised.

In support to these actions, our Office devotes itself, with the same constancy, to express concerns and expectations to political decision-makers. As an example, the UIRR does not miss an opportunity, such as during the EIM/ERFA/ERFCP/UIRR conference in Brussels about "Network Opening", to defend the viewpoint that effective rail liberalisation implies for a CT operator to be entitled to keep his paths – of which he bears the financial risk – for a sufficient period of time. He should thus be in a position to book these paths directly with infrastructure managers, or have his paths listed in a register these managers should keep of their genuine user so as to be assured he can take them along when changing railway undertakings (RUs). This would also ensure that in case of an invitation to tenders, different RUs do not unduly block several paths for the same service.

The above illustration shows our desire for a transparent communication so that our market knowledge helps the Authorities put in place all appropriate framework conditions needed for a sustained expansion of CT. Our newsletter and renovated web site form part of this open, interactive communication.





DYNAMISM THROUGH PROJECTS

Martin Burkhardt

Director General

The threat of terrorism also exists in transport but there is no cause to panic.

The UIRR has reacted swiftly by issuing, as early as 2004, some "Proposals aimed at increasing security in Combined Transport". Subsequently, the companies ADRIA KOMBI, CEMAT, HUPAC, KOMBIVERKEHR, NOVATRANS and TRW are working on the "INSECTT" project (INtermodal SEcurity for Combined Transport Terminals). This project is led by the UIRR and supported by the European Commission's Marco Polo program.

Throughout the transport industry, new security measures are being developed, but the concepts related to international airports and ports cannot simply be copied. The situation on transshipment yards for continental transport is quite different: hence, measures must be adapted to its specific requirements.



The updated ADR and RID regulations for the carriage of dangerous goods which came into force in 2005 have led to new security concepts being introduced in CT terminals. For instance, an identity control check for persons with access to dangerous goods areas as well as emergency and security plans have been required.

INSECTT's aim is to analyse measures and plans which have already been implemented in various countries as well as their transferability and to take the best concepts as a basis for proposing some European harmonised procedures. Hence, a European format of databases for identifying truck drivers and loading

units will be created in order to harmonise terminal software. The road driver's identification or allocation of passwords for collecting loading units are proving difficult, as subcontractors (truckers) with a particularly high turnover of staff are sometimes employed. Therefore, achievable solutions need to be found, which combine security with flexibility.



Furthermore, risk analysis is essential so that terminals can be categorised according to their different levels of threat, and specific security measures for each of them can be introduced. With this aim in mind, an analysis will be carried out to evaluate the proven measures for dangerous goods, which could be extended to other transportation. Staff training is equally important. Training material is thus developed as part of the INSECTT project and tested in an actual environment in order to make it available to interested operators at the earliest opportunity.

The security level in rail transport is already high. The UIRR companies aim at improving it through practical measures, while ensuring that they do not hinder Combined Transport's attractiveness and efficiency.



DYNAMISM OF THE ROLLING MOTORWAY

Wilhelm Patzner

Director General of ÖKOMBI GMBH

Newly restructured, Rolling Motorway (RoMo)'s long-term future is secured.

With SPEDITIONS HOLDING GMBH of RAIL CARGO AUSTRIA AG (RCA) acquiring 100% of the share capital in ÖKOMBI in September 2005, conditions for the development of Austrian Combined Transport were redefined.

Unaccompanied CT by means of containers, swap-bodies and semi-trailers has since been transferred entirely to the sister company ICA. At the same time, recently developed Rolling Motorway routes i.e. Salzburg-Triest, Wels-Arad and Wels-Oradea, which started on 1 October 2005, have complemented existing ÖKOMBI services. Since I have been appointed Director General by the shareholders of ÖKOMBI GMBH, my team and I, on the basis of my experience (among others as Manager for Control, IT, HR and Legal at RCA), are attending to exclusively develop RoMo services which are able to reinforce our leading position on this market segment. Hence, road transport companies do need an alternative.



over 70% in the middle of January 2006, the service was extended to 12 pairs of trains at the beginning of March 2006 and by doing so a two hours sequence over the Brenner route is offered.

With the new Brenner shuttle, the Rolling Motorway is clearly more economical than road transport (kilometre tax and fuel costs), even before considering the savings on other variable costs (lorry wear and tear, tyre, oil, etc.), the increased safety level and the fact that the RoMo journey constitutes a legally prescribed rest period for the lorry drivers. Then, this technique has long-term market potential in liberalised markets.

Many other interesting ideas are being considered. For instance, the launching of the first RoMo from Trento to Germany, already planned for 2006; additional services between Trento and Wörgl are the subject of market analysis. The concept of an "emergency RoMo" is also under way, as well as a pilot project for the Tracking & Tracing of the Brenner RoMo.

There are also several further projects apart from Brenner. In addition to existing routes i.e. Wels-Szeged, Wels-Maribor, Wels-Arad and Wels-Oradea, the RoMo Graz-Regensburg has been marketed since last November.



From 6 November 2005, the RoMo shuttle service between Brenner and Wörgl increased from three to ten pairs of trains per day. Following a constant increase of the load factor which had already reached

In 2005, the foundations were therefore set for the future success of ÖKOMBI, due to a highly motivated staff and to RCA's involvement, which sees the Rolling Motorway as a promising strategic product.



DYNAMISM OF EASTERN EUROPE

Grigore Stoica

Director General of Rocombi SA

The concentration of freight traffic in block trains on some routes to/from the port of Constanta, meant to reduce journey time and costs, is an important factor in the increase of CT volumes.

The port of Constanta is the most important Romanian entry point for the traffic of container goods (both import and export). This port comprises four sea terminals. From there, the containers are forwarded directly to different destinations by rail or by road. These destinations are 22 CT terminals, as well as over 40 railway stations throughout Romania, in which the customers have private sidings or specialised warehousing facilities.



All international commercial companies are preparing for EU entry; and this is particularly necessary for transport companies. A requirement for this is the development of domestic traffic, since Romania, whose size is comparable to Great Britain, can generate a relatively high volume of traffic. Like most CT operators, Rocombi needed for economic and efficiency reasons to organise its traffic in block trains, whereby it encountered two main obstacles:

- the large number of destinations generates a dissemination of consignments to/from Constanta, making the organisation of block trains more difficult;
- the entry of new private railway undertakings splits the market up and initially complicates the situation.

Some routes constantly attract large volumes of traffic i.e. Vintu de Jos - Constanta, where containers are transported on block trains for one single customer. These are, however, individual cases and Rocombi has consequently been planning to transport several customers' consignments per destination through improved cooperation with CFR MARFA. The consolidation of container traffic in Constanta South Container Terminal (C.S.C.T.) should, therefore, prove useful. This terminal opened two years ago and offers a capacity of 580,000 TEU/year. It is currently the largest intermodal terminal for the Black Sea, however traffic went beyond its capacity last year. Hence, its development has been initiated, as well as an extension and modernisation of the rail network and of Constanta South station.

By consolidating traffic on block trains and fewer transportation destinations, CT becomes more efficient and, consequently, even more attractive, and by doing so it will secure the forwarding of more goods by rail through targeted measures, in line with European Transport Policy.



DYNAMISM THROUGH INNOVATION

Marco Gosso

Director General of CEMAT SPA

Notwithstanding an economic climate marked by weakening trade flows and an increase in the cost of living, CEMAT has succeeded in rounding off this year's activity with a balanced sheet, thanks to a significant growth in its turnover.

This good result, reached in a context of complex and dynamic market conditions, can be attributed to the efficient command of three key areas of success i.e. development, cost management and innovation.

Over recent years, competitive pressure in the market has led to follow a trend towards concentrating on the main activity, and hence towards the consolidation of traffic flows. Committed to expanding activities in 2005, CEMAT has further rationalised its national operations, reinforcing the axes connecting areas of strong potential traffic volumes and launching new and highly competitive products. Although the Company has undoubtedly benefited from Italy's State aid policy, the results have been restricted considerably due to service quality levels well below market expectations. In spite of this, national growth has been more than 5% up on 2004 figures.

Internationally, partnerships with foreign counterparts have been strengthened, the range of products expanded, production resources increased, whilst an improvement in management and control tools has allowed the adaptation of the organisation to these changes. The figures speak for themselves: transport increase of over 9% compared to 2004, traffic development on principal routes and launching of new services to Eastern Europe.

Due to the interval between demand fluctuations and supply adjustment, the latter requires a control of the costs structure. In 2005, CEMAT successfully accomplished this task by putting measures in place in all



areas of the company, i.e. strict train timetabling, rationalisation of the network, optimising terminal operations and wagon maintenance and restricting overheads.

However, a cost reduction policy must be accompanied by innovative endeavours, which form the basis of any company's competitiveness and growth. This could mean launching a new product or wagon, a field in which CEMAT has always been very active, but could also involve a primary or support process. This latest undertaking, to which CEMAT has newly committed itself, will require a large amount of its effort for innovation to become systematic in order to support the development of CT services.





THE YEAR 2005 IN BRIEF

The UIRR

On the occasion of their Annual General Assembly on 16 June 2005, the UIRR's shareholders discussed the member companies' traffic evolution and the quality of services. This last point was also the subject of an animated debate during the INTERUNIT Coordination Committee meeting, which brought UIRR and UIC representatives together on the same day. It became indeed clear thereafter that the negotiations which had led to the signing of a *"Joint Commitment by Railway Undertakings, members of the UIC Freight Forum and Combined Transport Operators, members of UIRR, to develop the quality of scheduled trains operating Combined Transport services and of contracts covering this quality"*, on 5 July 2005, required strict monitoring, as well as new incentives for it to be implemented and to deliver the expected results.

A number of meetings with the European Commission regarding the development of Combined Transport (CT) took place in 2005. As mentioned in the foreword of this report, Mr. Jacques Barrot, Vice-President of the Commission and Transport Commissioner, has on several occasions underlined the Commission's determination to support the development of CT in its role of transferring goods to rail. On 9 February 2006, a visit of the Genk and Bierset terminals (B) was organised for the Intermodality Unit of DG TREN while, in April, a meeting with its Director General, Mr. Matthias Ruete, was the occasion to reiterate the UIRR's firm will to continue its close cooperation with the Authorities for the establishment of framework conditions that are adapted to CT.

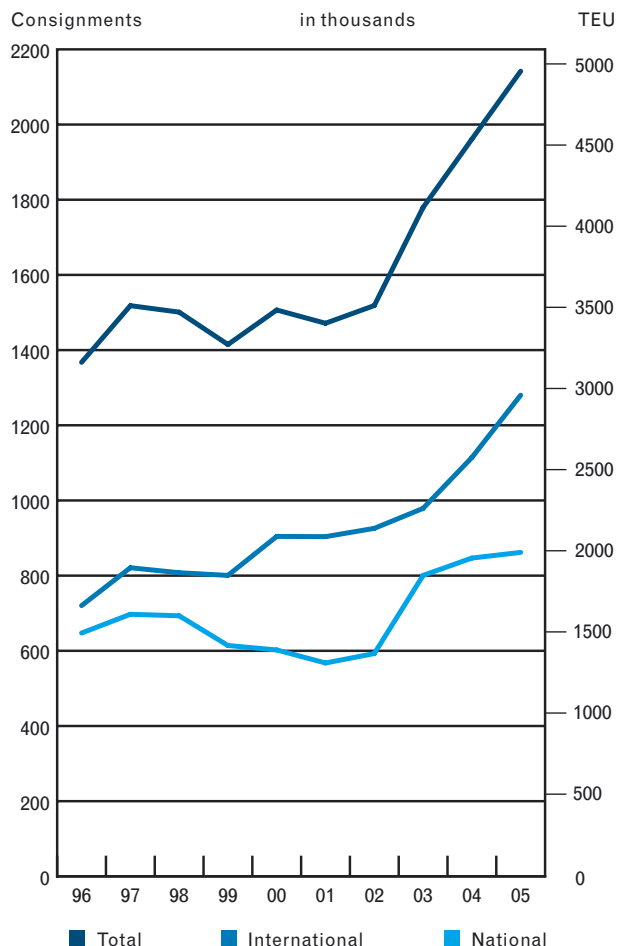
This commitment is materialised daily, with the Brussels Office being active in several European projects regarding amongst other things security in terminals (INSECTT), the development of CT services on given axes (SINGER to/from Slovenia, BRAVO for the Brenner axis), or the infrastructure capacities (DIOMIS). In addition, interaction between various CT actors is illustrated by the publication of information material such as the loading guide for CT, the leaflet on dangerous goods, or the member companies' statistics; all these documents are available on the **www.uirr.com** site, the new version of which has just gone online.

CIS (Cesar Information Services) is a company which manages information regarding more than 2.3 million units per annum, i.e. about two thirds of the consignments forwarded by the UIRR companies.



THE YEAR 2005 IN BRIEF - TRENDS

Unaccompanied Transport 1996-2005
(Swap bodies, Containers, Semi-trailers)



Unaccompanied Transport (Consignments)

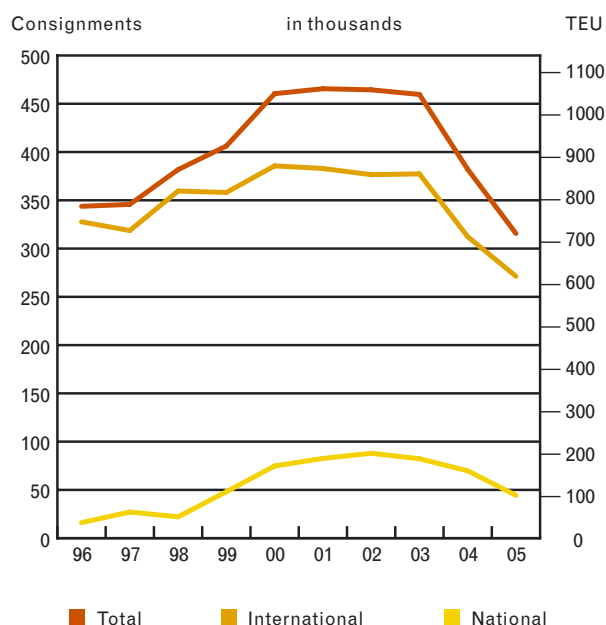
Year	International	National	Total
1996	720.190	647.287	1.367.477
1997	821.009	697.191	1.518.200
1998	807.739	693.233	1.500.972
1999	800.624	614.183	1.414.807
2000	904.339	602.314	1.506.653
2001	903.708	567.642	1.471.350
2002	925.742	592.731	1.518.473
2003	978.915	800.612	1.779.527
2004	1.114.364	846.775	1.961.139
2005	1.280.069	861.830	2.141.899

International unaccompanied traffic of UIRR companies has increased by 15%, or 166,000 consignments between 2004 and 2005. UIRR companies account for over 50% of the total number of such forwarded units. With the introduction of new production schemes (end to end traction undertaken by a single rail traction provider on the Gothard axis), traffic between Germany and Italy via Gothard and Brenner, which already represents more than 30% of the total number of consignments, has continued to grow strongly, by 7%. The increase in traffic to/from the ARA ports shows that the market for sea containers is becoming more and more significant for Road-Rail CT with a 18% growth between the Benelux countries and Italy, i.e. 36,000 more consignments than in 2004. With optimised transport planning, traffic to/from the Iberian peninsula has developed significantly with a 40% increase in the number of consignments (+15,000 in comparison with 2004). Unaccompanied CT is increasingly popular in the new Member States, particularly between Germany and the Czech Republic/Slovenia (+45% in total), between Belgium and Poland (new offer) and Croatia and Slovenia (+45%). The routes with the Scandinavian countries towards Germany and Italy have developed significantly (+40% or +9,000 consignments in comparison with 2004).

National unaccompanied traffic has increased by 2%. The excellent results achieved in Germany (+10% thanks to significant investments in terminals) and in Italy (+6%) should not conceal the profound impact of some important restructuring in France (-22%).

Overall, unaccompanied transport has increased by 9%. Intercontainer Austria's membership in UIRR has accelerated the growth shown in these statistics.

Accompanied Transport 1996-2005
(Rolling Road)



Accompanied Transport (Consignments)

Year	International	National	Total
1996	327.676	16.103	343.779
1997	318.657	27.087	345.744
1998	359.606	22.122	381.728
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

Once again, international accompanied CT faced a very difficult year, with a 13% decrease in the number of consignments. With new Member States joining the EU in May 2004, the market had to go through significant restructuring on all routes (positioning of companies and transport planning). Major lines such as Dresden-Lovosice and Manching-Brennersee were given up, which represented a loss of more than 85,000 consignments. Furthermore, some partners decided to end their involvement in this particular market in order to concentrate exclusively on unaccompanied CT.

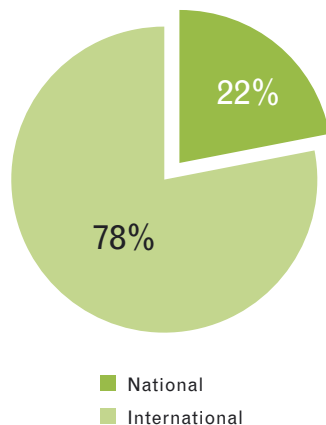
The Gothard situation is somewhat contrasting: connections between Freiburg-Lugano and Singen/Freiburg-Milan recorded a 20% decrease (gauge restricted to 3.80m), whilst the Freiburg-Novara route (4m gauge) increased by 22%, corresponding to 14,000 more consignments compared with 2004.

National accompanied CT has recorded very diverse results: a 12% increase on the Basel-Lugano route where lorries with a 4m height can be transported and a decrease of 45% due to changes brought about in the Austrian transport organisation.

THE YEAR 2005 IN BRIEF - TRENDS

Total Traffic

(Accompanied and Unaccompanied)



International and National traffic in Mio TKM

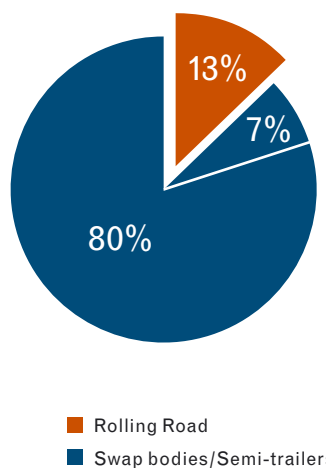
Year	International	National	Total
1996	19.584	7.583	27.167
1997	21.527	8.334	29.862
1998	21.926	8.308	30.234
1999	20.742	7.846	28.588
2000	24.330	8.156	32.486
2001	24.663	7.217	31.880
2002	25.027	8.047	33.074
2003	25.248	7.671	32.919
2004	26.173	8.338	34.511
2005	28.871	8.086	36.957

Despite the restructuring of accompanied CT, which has a higher average tonnage, traffic evolution expressed in tkm has been positive in international traffic (+10%). Transalpine traffic has significantly contributed to this increase: +20% to/from Belgium, +12% to/from Germany and +2% to/from the Netherlands.

National traffic has decreased by 3% mainly due to the strong decrease in the number of consignments in Austria and France.

The average distances are 800 km in international transport (decrease in the number of consignments on short distances for accompanied CT) and 560 km in national transport. The longest route is between Germany and Portugal (2200 km) and the shortest between Croatia and Slovenia (280 km). The average gross tonnage of a consignment is 25 tons in international and 19 tons in national transport.

Techniques



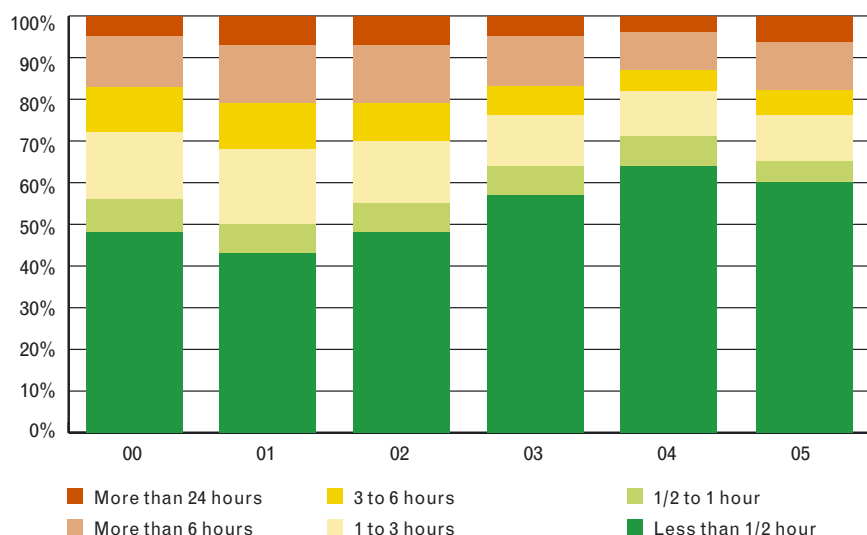
Proportion of CT techniques in total traffic in thousand consignments

Year	Swap bodies	Semi-trailers	Rolling Road	Total
1996	1.161	207	344	1.711
1997	1.333	185	346	1.864
1998	1.335	166	382	1.883
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

Unaccompanied CT accounts for 87% of the total number of consignments forwarded in 2005. The proportion of swap bodies and containers increased significantly due to the strong decrease in the number of consignments in accompanied CT and a significant contribution of several major routes: Belgium/Germany to/from Italy (+15% i.e. 62,000 more units compared with 2004) and Belgium/Germany to/from Spain (+41% i.e. 15,000 more units compared with 2004). Ca. 58% of swap bodies and containers are forwarded internationally, the rest nationally. With 7% of the consignments, the proportion of semi-trailers has been maintained on the 6 major routes representing the quasi totality of the consignments using such units (Germany/Belgium/Denmark/France/the Netherlands to and from Italy and Germany-Switzerland). Accompanied CT is in sharp decline (-18%): a 14% decrease internationally, coupled with an even more significant decrease nationally (-36%).

Punctuality

(Delays)



2005 has been a difficult year both in terms of collecting figures (lack of figures for the Brenner axis and explanations for delays becoming increasingly less precise) and train performance. Out of 21,000 international trains monitored in 2005, 60% arrived on time (30 minutes tolerance), 23% recorded a delay of over 3 hrs and 7% a delay of more than 24 hrs, scores which, calculated on the same basis, show a decline compared to 2004 figures on nearly all routes monitored. Furthermore, some UIRR partners have thoroughly restructured their production systems because of punctuality issues: all of the transalpine traffic operating through Modane (F) has been transferred to the Gothard (CH). It seems that quality contracts being signed between operators and RUs have not yet improved punctuality, which remains a main objective for UIRR companies. The different approach regarding reasons for delays within some Quality working groups does not always allow to elaborate required solutions on undisputed terms. The situation remains of concern and will need to be carefully monitored in 2006.



THE YEAR 2005 IN BRIEF

Member Companies

Last October, **CNC** repositioned its activities on maritime services and was concurrently renamed **NAVILAND CARGO**; it serves the ports of Antwerp, Le Havre, Marseille and Zeebrugge and supplies full road services under the name of NaviTrucking. As from 1 January 2006, **HUNGAROKOMBI** is concentrating exclusively on the Rolling Motorway, while unaccompanied CT services are marketed by the new company HUNGARIA INTERMODAL. **KOMBIVERKEHR** has acquired capital shares of the Dutch company OPTIMODAL, and of the CT operator, **INTERCONTAINER AUSTRIA (ICA)**. By doing so it has reinforced its partnerships for its block train connections on the corridors to the Benelux countries, Austria and South-East Europe.

In June 2005, **EUROTUNNEL** appointed Mr. Jacques Gounon Chairman and Director General and, in January 2006, Mr. François Coart Director for Freight Development. In February 2005, the company received the British award for "Rail Safety and Security Excellence" for its results regarding safety, and has taken over direct marketing of freight services with small and medium-sized European transport companies.

After having served **KOMBI DAN** for 20 years as Director General, Mr. Hans Raun retired in favour of Mr. Per Fl. Christensen. Mr. Wilhelm Patzner has been appointed Director of **ÖKOMBI** to replace Mr. Stefan Hofer.

The structure and significant increases in the railway tariffs, as well as the requirements for quality and

profitability have led certain UIRR companies, over recent years, to increasingly concentrate their business on a system of block and shuttle trains, rather than on wagon load traffic, and this has enabled transshipment times to be reduced and goods flows to be aggregated. The Rolling Motorway concentrates on certain routes, and constitutes the exclusive activity of **HUNGAROKOMBI** – whose customers are located primarily outside the EU –, and of **ÖKOMBI** and **RALPIN**. Some restructuring will occur within **RALPIN** in 2006, with the relocation of its head office in Olten (CH) and the reintegration of the technical and financial functions, under the leadership of a single Director General, Mr. René Dancet, directly attached to this company. Owing to the low railway gauge of the Gothard, the Swiss operator **HUPAC** makes use of special low-floor wagons enabling the transportation of lorries with a maximum height of 4 metres. These wagons are, however, only authorised to circulate in Switzerland; the marketing of international services would thus require a European harmonisation of the authorisation procedures for rolling stock. In addition, **HUPAC** has ordered 500 modules (250 articulated wagons) developed in collaboration with the manufacturer for the forwarding of mega-trailers with a maximum interior height of 3 metres. **NOVATRANS** should carry out tests during 2006 for the utilisation of AFR pocket wagons intended for the carriage of traditional road semi-trailers not equipped with handling devices.



THE YEAR 2005 IN BRIEF

European policy

In October 2005, the European Parliament examined the Commission's proposals for rail revitalisation, as set out in the third railway package. Subject to some amendments, texts for the opening of the European market for the transportation of passengers, the harmonised certification of train drivers, as well as compensation to passengers in cases of delay, have been adopted by the European Parliament; however, the Parliament has rejected the text prescribing compensation for freight customers in such cases. The UIRR has reacted and underlined the cost which the lack of punctuality causes to the various stakeholders of the CT chain, as well as the altogether moderate level of compensation which had been envisaged (between 5 and 25%) compared to those granted to passengers (25-75%). These compensation levels were not and are not to be seen as a means to generate revenues for CT operators, but merely designed as an incentive in view of obtaining railway services of better quality and hence more adapted to market expectations. The Commission indicated that it would continue to follow up the evolution of rail freight quality, while the UIRR is devoting itself to encourage the implementation of the above-mentioned joint UIC-G.TC/UIRR Commitment.

The question of rail service quality is at the heart of the liberalisation process: indeed, competition between incumbent railway undertakings and new entrants supports the improvement of punctuality, as observed on the Brenner axis. The opening up of the market, which started with the 1st and 2nd railway packages, has

produced other positive effects, such as **HUPAC's** tender for continuous rail traction of its international trains, or **EUROPORTE 2**, a subsidiary of **EUROTUNNEL**, which has obtained the operator's railway licence in France.

With the consultation launched by the Commission about the revision of its 2001 White Paper on Transport, the UIRR has welcomed its actions for the revitalisation of rail, but also pointed out the need for a quicker transposition of the liberalisation process by Member States, as well as for a substantial improvement of rail service quality. Furthermore, the UIRR has called for the generalisation of the performance schemes prescribed by Directive 2001/14 for the infrastructure managers, the completion of Trans-European Transport Networks, and a proportioned allocation to the various modes of infrastructure charges.

The setting up of the European Railway Agency (ERA) continued in 2005, with notably, the first meetings of the specialised working groups. The ERA has the task of developing railway safety and interoperability in Europe, by means of recommendations addressed to the Commission which will be used as a basis for the preparation of Community legislation in these matters. The UIRR has a member on ERA's Administrative Board, with Dr. Janos Berenyi, as the representative of the freight customers.



THE YEAR 2005 IN BRIEF

Development of CT services

New routes

Community support to the SINGER project, within the framework of the Marco Polo program, has enabled **ADRIA KOMBI** and its partners to develop the Ljubljana terminal as a hub, particularly for new block train connections to Verona. **ALPE ADRIA** has inaugurated a route between Trieste (I) and Budapest (HU), while **CEMAT** has developed many routes to Austria and, beyond, to Eastern Europe (Czech Republic, Hungary and Poland). A Verona-Ljubljana shuttle will also be launched, with antennas to Romania, Serbia and Croatia. **CROKOMBI** has started block trains to Hungary, and is setting up a Rolling Motorway between Zagreb (HR) and Padova (I). In 2005, **HUPAC** introduced many additional routes from/to Germany, Belgium, Italy, as well as a service to Rotterdam (NL), Taulov (DK) and Poland. UIRR member since January 2005, **ICA** has established growing partnerships with other UIRR companies and has also widened its network towards South-East Europe through its subsidiaries in the Czech Republic, Slovakia, Hungary and Romania. The German operator **KOMBIVERKEHR** has launched a shuttle to Sweden, block trains to Cervignano (I) and Granollers (E, with **COMBIBERIA**), Wels (A) and Budapest (HU, with **ICA**). It provides a connection to/from Lovosice (CZ) together with **BOHEMIAKOMBI** which, following the removal of road restrictions applying before to the new EU countries, is now concentrating on unaccompanied CT. In 2005, **NOVATRANS** recorded significant growth on its routes in Great Britain, but also to Scandinavia

and Greece. **ROCOMBI** is studying the feasibility of routes connecting Romania to Hungary, the Czech Republic as well as other Western European countries. Having developed its traffic to Spain (increasing frequencies and acquiring part of the ICF traffic), **TRW** is in turn planning to introduce connections to Eastern Europe in 2006.

Terminals

The new terminal of Spačva (HR) will enable **CROKOMBI** to set up connections in 2006 first to Ljubljana (SI), then to Salzburg (A). In September 2005, **HUPAC** inaugurated the Busto Arsizio-Gallarate terminal, as the hub for its Shuttle Net network. The new Oradea terminal offers a performing infrastructure for the traffic managed by **ICA**'s subsidiary in Romania. Last October, the Port of Kiel and **KOMBIVERKEHR** formed a joint venture for managing this city's terminal. **NOVATRANS** has transferred its activities from Montpellier to Sète, and opened up the second part of the Valenton terminal for the development of new routes. The improvement in the efficiency of the **RALPIN** services will continue with the planned opening of the Freiburg in Brisgau terminal, from which continuous traction towards Domodossola (border I-CH) will be made possible. **ROCOMBI** is about to concentrate its national traffic on the Costanta (RO) terminal, which will be enlarged to this effect.

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