INTERNATIONAL UNION
OF RAILWAYS

unity, solidarity, universality

DIOMIS 2:
Growing Intermodal Traffic in CEEC Countries

DIOMIS, Agenda 2015, a vision for Combined Transport for Europe
www.uic.org/Diomis

Final Conference, Vienna, March 25th 2010

Introduction to Panel 3: the Way Forward

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Chairman of the UIC Combined Transport Group

DIOMIS Agenda 2015: strong involvement and interaction between the stakeholders are needed

Actions ↓ / Main actor and involved parties →	Infrastructure Manager	Railway Undertaking	Intermodal Operator	Terminal Operator	Ministry of Transport	European Commission	Other	Reference to DIOMIS report...
More efficient use of infrastructure								
Employment of infrastructure-efficient, train path-saving rail production systems		□	■					A7
Application of incentives in infrastructure access charging systems to induce resource-saving production schemes	■	□	□	□				A11
Significant improvement of the rate of punctuality and consistency of rail traction services:	□	■	□	□				A11
Enhanced process organization of rail traction services	□	■	□					A11
Implementation of smart train and network capacity management systems		□	■	□				A5
Implementation of longer and/or heavier trains including minor infrastructure adaptations	□	■	□				□ 1)	A7
Increased wagon axle loads	■	□	□				□ 1)	A10
Application of good practices in terminal operation and management	□	□	□	■				A4
More infrastructure investments and international coordination								
Implementation of ongoing and envisaged rail network investments	■				□	□		A0/A1
Conclusion of an international agreement on "Achilles' heels" removal programme	□	□	□		□	■		A0/A1
Realization of ongoing and envisaged terminal investments and implementation of an intermodal hub programme	□		□	□	■	□		A0/A4
Implementation of a standardized process for ensuring the international co-ordination of combined transport terminal development	□	□	□	□	■			A8

1) Railway Industry   ■ Main Actor   □ Involved Party

Source: DIOMIS, Agenda 2015 for Combined Transport in Europe, January 2008

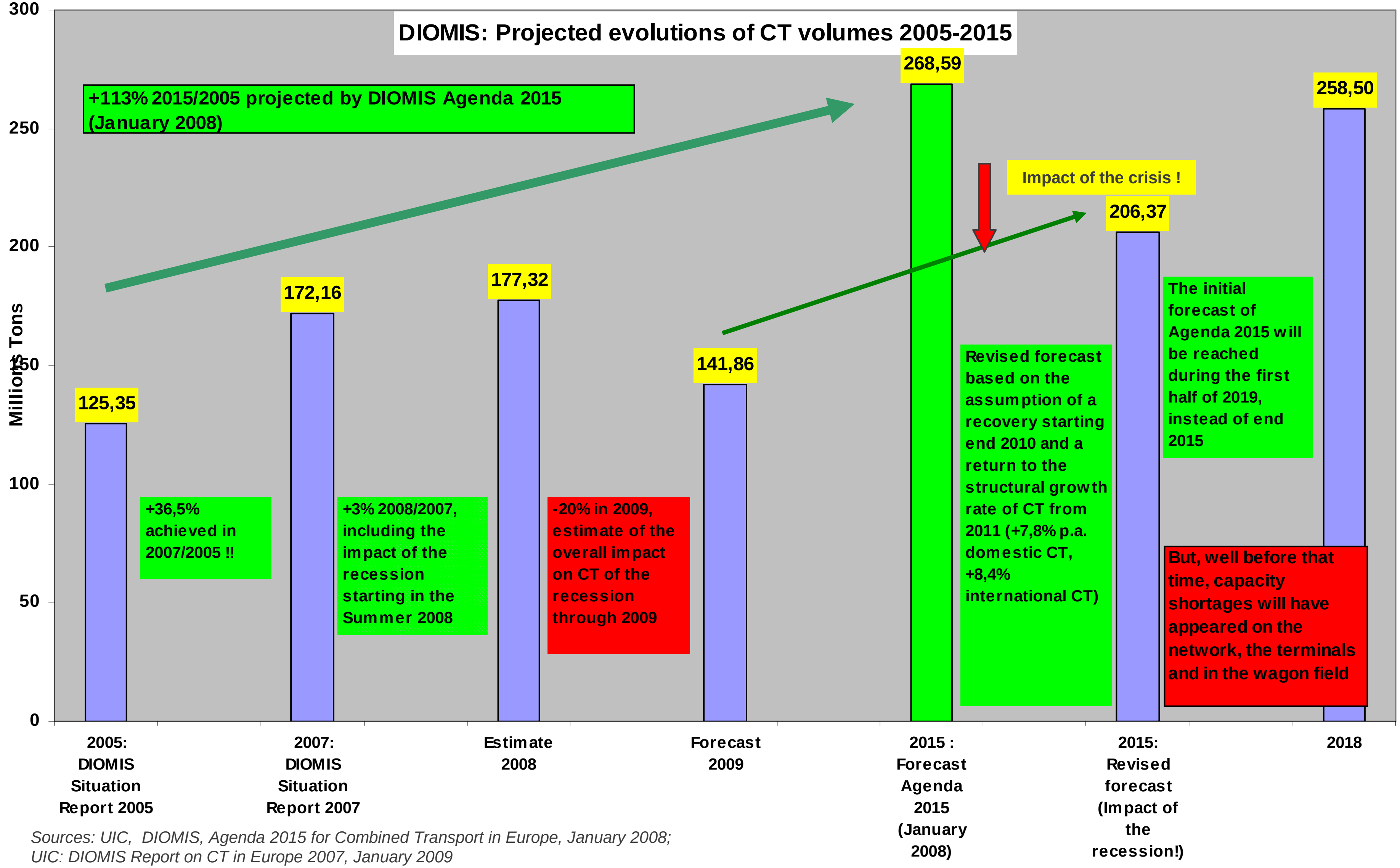
The DIOMIS Agenda 2015 for CT in Europe is a toolbox:
- providing the stakeholders with a set of actions,
- to be taken by all of them, including the IMs,
- in order to improve the use of the available infrastructure,
- thus helping to meet the increased demand for CT,
- and contributing to the modal shift

Close cooperation between the stakeholders and coordinated and persistent action by each of them in their respective fields of competence are indispensable to allocate to the CT trains the necessary space on the rail infrastructure

DIOMIS II has extended the methodology and the inquiry to a number of selected CEE countries.

Final Conference in Wien on March 25th 2010

Despite the current recession, European CT volumes will increase by 2015



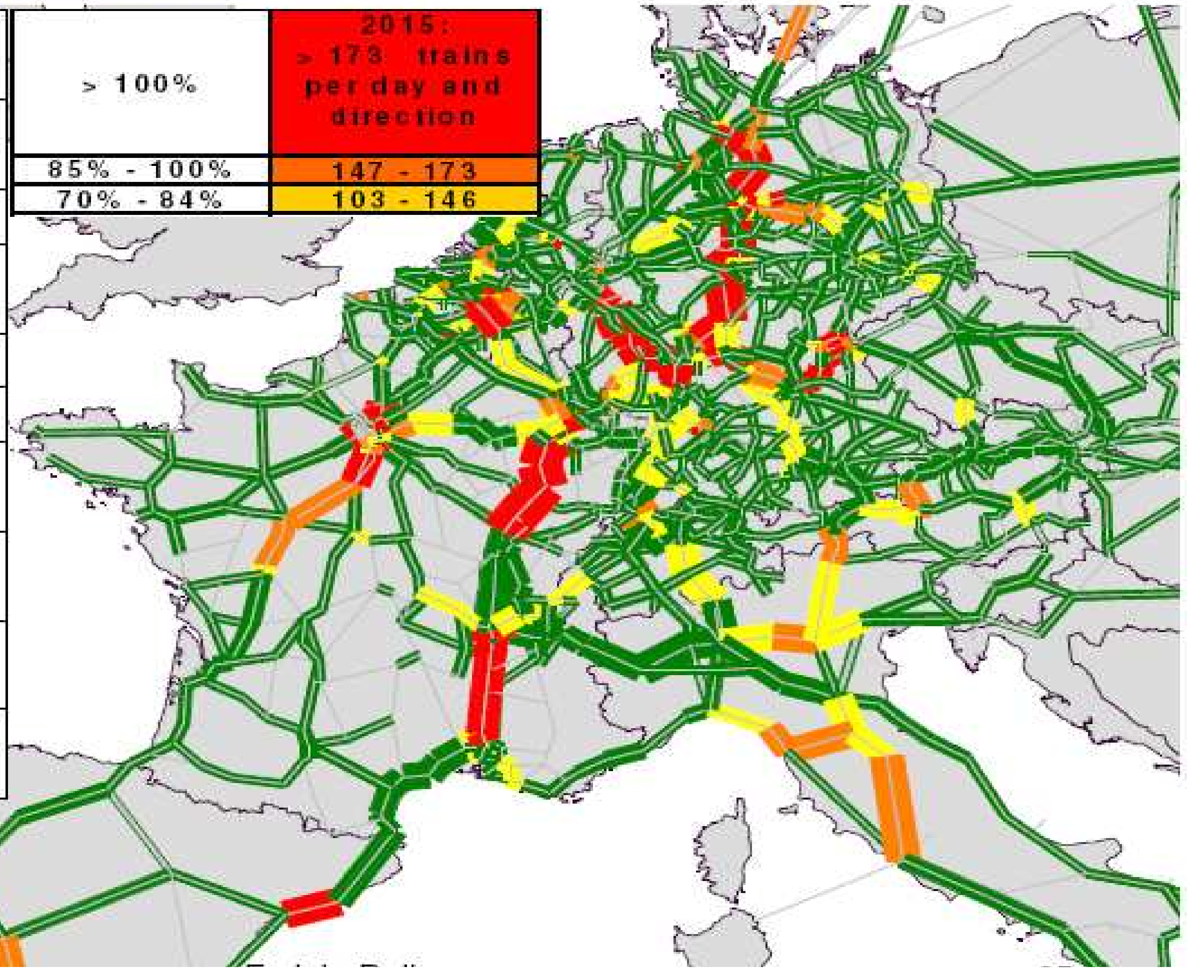
Sources: UIC, DIOMIS, Agenda 2015 for Combined Transport in Europe, January 2008; UIC: DIOMIS Report on CT in Europe 2007, January 2009

CT constitutes the strongest growth segment of rail freight and the major vector of modal shift

By 2015, a number of bottlenecks on the Central network, identified by DIOMIS, will need to be removed

2003-7 study of UIC Combined Traffic Group: Capacity utilisation 2015: severe bottlenecks in key places of the network

	Main axes with bottlenecks
Germany	Hamburg – Rhein/Main
	Köln – Rhein/Main
	Saarbrücken – Stuttgart
France	Metz – Dijon
	Lyon – Avignon
	Paris – Orléans – Tours
Belgium	Freight corridors from/to Antwerp
Switzerland	Greater Basel area
Spain	Barcelona-Tarragona



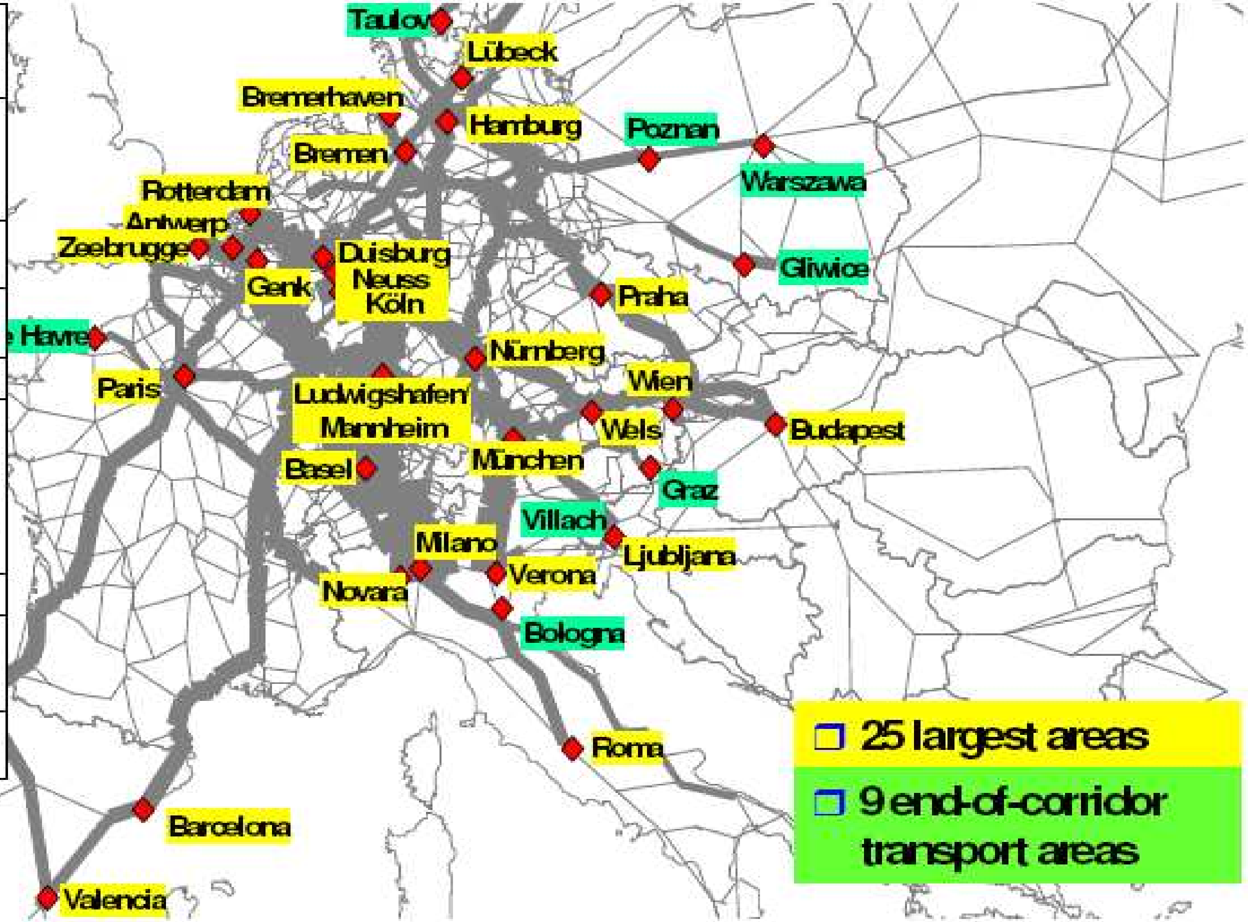
Source: UIC:, DIOMIS, Agenda 2015 for Combined Transport in Europe, January 2008

CT terminals will also need additional capacity extensions

Top 25 terminal areas by 2015 for international CT

	Transport areas with additional capacity need
Austria	Graz Villach Wien Wels
Belgium	Genk Zeebrugge
Czech Republic	Praha
Denmark	Taulov
Germany	Hamburg Köln München Neuss Ludwigshafen/Mannheim
Italy	Milano
Poland	Gliwice Poznan Warszawa
Spain	Barcelona Valencia Madrid

3.4 Million additional Loading Units capacity required By 2015



CT terminals will need, by 2015, an additional capacity of 3.4 Million loading units, on top of the planned investments

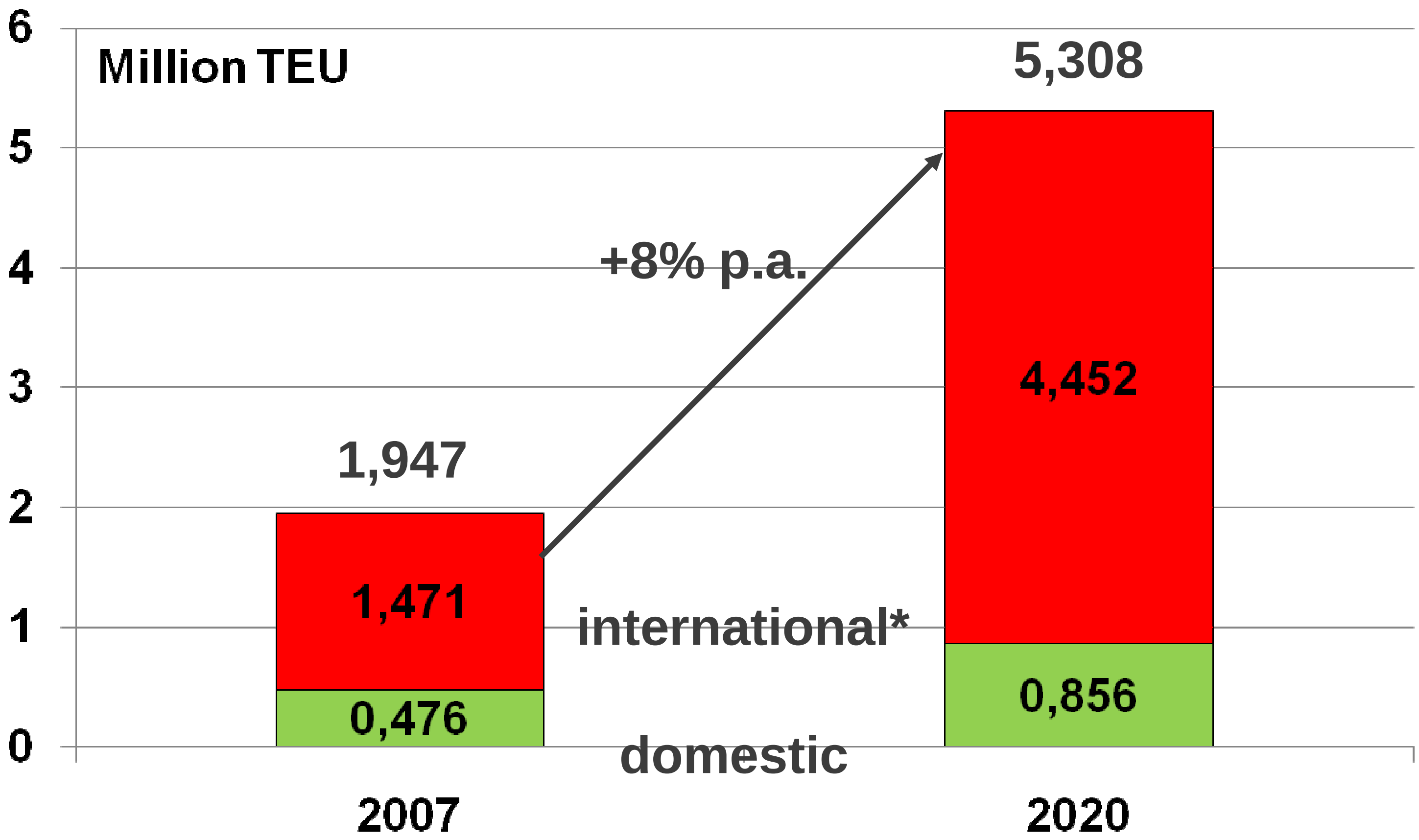
Sources: UIC: Capacity Reserve Study for CT 2015, May 2004; UIC: DIOMIS, Agenda 2015 for Combined Transport in Europe, January 2008

Increasing number of suppliers of Unaccompanied CT services in CEE Countries, 2007/2009

	Bulgaria	Czech Republic	Croatia	Hungary	Poland	Romania	Slovakia	Slovenia
Infra-structure Manager	NRIC	SŽDC	HZ Infra	GySEV	PKP PLK	CFR	ŽSR	SZ
				MÁV	Other 12 IM's			
Railway Under-takings	BDZ	CD Cargo	HZ Cargo	Floyd	PKP Cargo	CFR Marfa	ŽSSK Cargo	SZ
	Bulgarian Railway	OKD (2009)**		GySEV	PKP LHS	GFR		Adria Transport (09/2008)**
	Bulmarket*	Other 60 RU's		MÁV Cargo	PCC Intermodal	LSD		GKB (02/2008)**
	Other 3 RU's (2008)**			WLC	CTL	Servtrans Invest		RCA (07/2008)**
					Other 42 licensed,			
Intermodal service suppliers	Adria Kombi	Adria Kombi	AGIT	Adria Kombi	Argo	Adria Kombi	Adria Kombi	Adria Kombi
	ICA	Alpe Adria	Crokombi	Alpe Adria	ERS	CFR Marfa	Argo	Argo
	ICF	Argo	ICF	Argo	Hupac	Eurolog	CSKD Intrans	ERS
	Kombiverkehr	Bohemiakombi	Shipping lines and forwarders	ERS	ICF	ICA	ERS	ICA
	Transfesa	CSKD		Eurogate Intermodal	Kombiverkehr	ICA Romania	Kombiverkehr	ICF
		ERS		Hungaria Intermodal	PCC Intermodal	ICF	Metrans	Kombiverkehr
		Eurolog		Hupac	Polzug	Pol-Rail	SKD Intrans	Metrans
		ITL		ICA		Rocombi		Ökombi
		Kombiverkehr		ICF		TRW		Pol-Rail
		Metrans		IFB				Shipping lines and forwarders
		RailRelease		Kombiverkehr				
		SAR		Metrans				
				Navismart				
				Pol-Rail				

*Source: KombiConsult analysis; * not active in intermodal rail/road traffic in 2007, ** licensed after 2007 (year)*

Unaccompanied intermodal rail-road traffic volume in CEE countries, 2007-2020



* Transit not included to avoid double counting

Source: KombiConsult analysis

The way forward for intermodal strategies in CEE Countries ?
Questions to be addressed by Panel 3

- **How shall Railways and Operators cooperate successfully, in relation to CEEC traffics, to develop market relevant CT services (continental and container hinterland) ?**

- **Shall they be able to industrialize the production of CT services and thus realizing the indispensable productivity gains and achieving seamless interoperable services ?**

- **Will the CT industry be able to catch the opportunities offered by climate policies in the CEE Countries ?**

- **Challenges to be addressed in the CEEC, in order to ensure that adequate and modernized rail and terminal infrastructure will be at hand, and related to public and business policies regarding**
  - finance,
  - track access, infrastructure charges for CT, priorities
  - new sites for terminals and development/upgrade of existing terminal capacity

- **Change of attitudes of the Railways in CEEC**
  - more focus on CT ?
  - internationalization ?
  - initiatives in new products ?