



Position paper

# Mobility for Europe

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# MOBILITY FOR EUROPE

## Contents

Develop an infrastructure fit for the future	6
Implement environment protection in a balanced way	12
Strengthen logistics industry	18
Drive forward digital networking	24
Complete European single market	30
German Transport Forum	36
Members	38

# MOBILITY FOR EUROPE



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Chairman of the Presiding Board of the German Transport Forum,  
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The growing together of Europe is not just fact and the reality of life, it is also political will. A united Europe, it is argued, will prosper and be able to fully develop its economic strength. If nothing else, a strong Europe depends on a solid and well connected transport system. Equally important are fair conditions of competition for mobility companies – between the various member states of the European Union and between Europe and the other continents. Despite discernible progress there

remains a lot of catching up to be done in the areas of infrastructure and competition.

As of 2013 around 505 million people were living in the EU and the gross domestic product produced by all 28 EU member states amounted to 13 trillion euros. Producing over 2.7 trillion euros, Germany accounts for the biggest share of this. The drivers for this are imports from and exports to Germany's most important trading partners, France, the USA, the United Kingdom, China and the Netherlands. We in Europe are heavily interwoven with each other and at the same time dependent on global markets. Nowhere is this more evident than in the transport sector.

Our agenda, »Mobility for Europe«, sets out the fields of action and meas-

ures necessary for a European policy which ensures that the mobility culture in Germany and Europe remains world-leading and that our companies can continue to hold their own in the tough competition with service providers and manufacturers from other continents.

These include the following:

- Develop an infrastructure fit for the future, e.g. implement priorities in Trans-European Transport Network, push for public-private partnerships, create a single European sky and eliminate discontinuities in European rail transport.
- Implement environmental protection in a balanced way, e.g. set European climate objectives for 2030 that do not put Europe's competitiveness at risk, support infrastructure for alternative fuels, regulate emissions trading in air transport on an international basis and push for brakes to

be fitted on goods wagons across Europe.

- Strengthen logistics industry, e.g. keep parcels market open to free competition, finalise port regulation and ensure that the same security measures apply worldwide.
- Drive forward digital networking, e.g. creative standard interfaces for intelligent transport systems, implement European emergency call system and extend open data approach.
- Complete European single market, e.g. creative discrimination-free market access for rail transport and strengthen Germany as a transport location in the global competition.

The transport industry in Germany is aware of its responsibilities and offers European politicians its support in tackling these important tasks.

# DEVELOP AN INFRASTRUCTURE FIT FOR THE FUTURE

To keep Europe an attractive and competitive location and protect the basis of our mobility in Europe, it is imperative to have an infrastructure that can be used without limitations and meets our requirements.

All modes of transport need an efficient transport market. They need to be integrated into a common European transport system as partners sharing the work according to the principle of co-modality. It is particularly important to create seamless interfaces between the

modes of transport and eliminate obstacles at national borders. Until the structural and technical preconditions for cross-border traffic have been created, the European single market cannot bring to bear its full strength.

If the best possible use is to be made of the existing infrastructure and processes are to be efficient, modern transport technologies are necessary. These can overcome system boundaries and help reduce emissions.



## Implement priorities in the Trans-European Transport Network (TEN-T) speedily.

The projects to eliminate bottlenecks at important transport interchanges and to improve interfaces with non-EU states must be implemented without delay. This will make it possible to connect up the main arteries to a European network. Moreover, to enable seamless travel across borders and modes of transport, their interchange points especially must be improved. The far-reaching rework of TEN-T defines for the first time a core transport network with nine main corridors that is to be completed in 2030. This replaces the previous collection of unconnected individual projects.

The new core network

- connects 94 European ports to the rail and road networks
- provide rail connections between 38 major airports and urban areas
- includes 15,000 km of railway tracks designed for high-speed trains and
- contains 35 cross-border projects for the elimination of bottlenecks.

The core network consisting predominantly of rail projects will be supplemented by a comprehensive network of

regional and national feeder roads to be built by 2050.

## Adequately co-finance TEN-T.

European co-financing is inadequate and must be increased to ease the burden on the EU member states and as a result speed up the implementation of TEN-T.

For the period 2014 to 2020 the EU is only making 26 billion euros available for TEN-T as start-up finance. This is a mere 10 % of the predicted 250 billion cost of eliminating bottlenecks and bridging the gaps in the TEN-T core network up to 2030. The cost of completing the full TEN-T network is estimated at 500 billion euros. Germany requires financial relief since, with six out of nine TEN-T corridors, it will have to manage the biggest share of the European core network.

## Promote project bonds to improve the credit rating of TEN-T.

Building on experience gained from the pilot phase in the use of European project bonds to finance infrastructure, a regular financing instrument needs to be created.



Economically feasible infrastructure projects in the EU that meet the TEN-T criteria can benefit from the test phase (2014 to 2015) through project bonds because this has the effect of improving their rating.

### Push for public-private partnerships (PPP).

The EU must firmly drive forward PPPs, document best practices and develop European financing instruments. As well as public sector financing, the EU needs to actively push for the involvement of private capital (insurance com-

panies, pension funds etc.) in the financing of infrastructure. The EU can support this by actively monitoring the exchange of positive experience from PPP projects in Europe. A PPP implementation should be examined and is to be preferred wherever this means that the projects can be implemented and run in a manner that is more economic, faster and more efficient for all the participants and quality improvements can also be achieved.

### Reinvest revenue from the transport sector.

Receipts from transport sector users must be fully invested in the infrastructure. According to the EU Eurovignette Directive, this revenue already has to be used in its entirety on maintaining and developing the transport infrastructure. This is not the case everywhere. To revitalise highways that in some cases are in very poor condition, the EU Commission and the European Parliament must work towards the establishment of closed funding circuits in the member states. As part of this, under EU legislation the proceeds of auctions of ETS certificates have to be ploughed back into the financing of specific climate protection measures.

## Create a Single European Sky (SES).

To improve efficiency in European airspace and make use of environmental advantages, the SES must finally be implemented. Structural reform of European air traffic control is also essential from the climate policy viewpoint. Optimisation of processes in the airspace could cut CO<sub>2</sub> emissions in European air transport by up to 12 %.

For many years there has been a consensus that air traffic control in Europe has to become more efficient. However, implementation of the SES continues to encounter considerable difficulties. The Functional Airspace Blocks (FABs) that are supposed to orient airspace management not to national borders, as at present, but to traffic flows are not being implemented fast enough. Efficiency gains from harmonisation and the development of new air traffic control technologies will only fully take effect when the EU member states finally put EU-wide optimisation ahead of their national interests and vested rights. Ambitious goals also have to be implemented when it comes to compliance with EU performance standards. To lay the technological groundwork for a

Single European Sky, the public and private sectors continue to work closely together on the SES Air Traffic Management Research (SESAR) project.

## Eliminate discontinuities in European rail transport with ERTMS.

If cross-border rail transport is to be seamless, system interruptions at national borders must be surmounted. This requires adequate financing of the European Rail Traffic Management System (ERTMS) on the TEN-T. To avoid future compatibility problems, the European Railway Agency (ERA) should coordinate the development of an internationally compatible version.

Implementation of the already agreed equipping of the most important European corridors with ERTMS has been delayed. This makes it all the more important to use the new European funding resources provided under the Connecting Europe Facility. This will enable the co-financing of investment in infrastructure and vehicles on the trans-European transport corridors. Germany has to bear the main burden, as four of the six ERTMS corridors run there.



### Support and develop European Electronic Toll Service (EETS).

Cross-border road haulage traffic should not be impeded by the system limits of national toll collection systems. EETS can overcome these obstacles. The implementation of EETS in the EU member states and the harmonisation of requirements must be pushed ahead. The business model of complete coverage of Europe by potential EETS service providers is not yet viable due to lack of demand. The EU requirements must therefore be relaxed to enable step-by-step expansion of EETS, concentrating on the most important transit countries in road haulage.

### Utilise GALILEO.

The ongoing construction of the European satellite navigation system

must be further actively supported, especially by the European Commission. To reap the full benefit of the system, new concepts of use (e.g. driverless systems, disposition of parking spaces, container position fixing) that exploit the capabilities of GALILEO must be developed. When it comes to the development of terminal devices and value-added services, demand and the willingness to pay of the end customers must be considered. Research activities must be coordinated and applied rapidly on pilot projects. Transparency must be created as regards the financing concept for the operating phase of GALILEO and the resulting usage charges.

# IMPLEMENT ENVIRONMENT PROTECTION IN A BALANCED WAY

When it comes to further improvement of the environmental balance, the EU must ensure that initiatives aimed at climate protection are not at odds with the retention of competitiveness and jobs. The transport sector is investing massively to increase energy efficiency and reduce the emissions of greenhouse gases. A unilateral increase in the cost of mobility in Europe will not help the cause of climate protection. The EU may have a pioneering role in this area, but it must not be allowed to fall into the trap of going it alone in the global context. One important practical component of success is the promotion of new, improved engines and fuels for all

transport modes – this must be continued and expanded.

The subject of traffic noise is becoming more and more important in the public debate. However, it must not turn into a new obstacle to the development of mobility. The EU must therefore also champion the cause of resisting further restrictions in the operating hours of European airports and encouraging the use of quiet goods vehicles. As a matter of principle, not only must the mobility industry make its contribution towards noise reduction, but the public sector must make a bigger contribution towards noise protection measures as well.



### Set European climate objectives for 2030 that do not put Europe's competitiveness at risk.

As well as sustainability and climate protection, the EU also needs to have its eye on Europe's competitiveness and security of supply. The CO<sub>2</sub> reduction goals and targets for the expansion of renewable energy sources must be realistic and reliable.

The EU Commission is proposing a re-orientation of climate and energy policy that entails a binding greenhouse gas emission target of 40 % (compared with 1990) by 2030. This target is very ambitious. Before it is finally fixed, steps must be taken to ensure that other industrial nations and important developing nations are prepared to endorse such a target. The European transport industry must not be placed at a disadvantage in the global competition as a result of unilateral requirements.

### Support infrastructure for alternative fuels and optimise framework conditions.

With the EU Directive on expansion of the refuelling infrastructure for alterna-

tive fuels the EU member states have committed to building up a reasonable supply network for charging current, natural gas and oxygen (CNG / LNG).

The EU should actively support national expansion plans. Alternative fuels and forms of propulsion must be established as economically viable as quickly as possible without certain forms of energy being given preferential treatment through public stipulations.

To enable the prices of alternative fuels to be indicated more transparently, the EU Charges Disclosure Rule must be modified. Modification of price marking and payment settlement will create additional costs at petrol stations. Prior to implementation the question of who will bear these costs must therefore be clarified and settled fairly. The EU should continue to actively support international standardisation and harmonisation in the areas of vehicles and infrastructure.

The action plan for LNG in shipping must be energetically implemented and alternative 2nd and 3rd generation fuels must be promoted for use in



transport. The efforts to implement the EU's bio-kerosene quota for air transport must be stepped up.

### Accurately model CO<sub>2</sub> emissions in heavy-duty vehicles.

In the VECTO simulation programme, the EU has the basis for the future strategy on reducing CO<sub>2</sub> emissions in heavy-duty vehicles. The programme takes into account the complex starting situation: the fuel consumption of heavy goods vehicles depends heavily on the specific nature of use and the combina-

tion of tractor engine and trailer. However, if the use of goods vehicles generally is to be accurately modelled, VECTO must be completed. Once this has been done it will be possible to transfer the results to the certification procedures for heavy-duty vehicles. This will significantly increase transparency for the purchasers of goods vehicles and increase competition among the manufacturers, resulting in the initiation of further market-side reductions in consumption.

In order that fuel consumption and CO<sub>2</sub> emissions can be further reduced in the future a number of measures have to be successfully implemented. As well as improvements to the vehicles in terms of aerodynamics, propulsion, auxiliary equipment and chassis these also include alternative fuels, fuel-saving tyres and other optimisations in vehicle usage and infrastructure. When the specifications for the implementation of the EU directive on the dimensions and weights of commercial vehicles are finalised, security aspects should simultaneously be optimised.

### **Regulate emissions trading (ETS) in air transport on an international basis.**

Implementation of the emissions trading system must not be allowed to lead to competitive disadvantages for European air transport companies or to fresh confrontation with non-EU states. Until a solution has been found at the level of the International Civil Aviation Organisation (ICAO), the ETS must also be deferred in Europe. ICAO is preparing for the adoption of a global market-based system for CO<sub>2</sub> emissions in 2016 and its implementation from 2020. The EU must focus its efforts on successfully negotiating this system in a consensus with the international partners.

### **Eliminate double burdens in rail transport.**

The EU emission trading system and energy taxes must not result in public transport being subjected to a double burden, which not only is not justified by the facts but has the effect of raising the cost base of mobility by rail.

### **Put CO<sub>2</sub> monitoring system for shipping on an international basis.**

As a global mode of transport, maritime shipping must be subject to the same CO<sub>2</sub> emission reduction rules the world over. Bringing this about must remain the primary objective.

The shipping industry is already taking extensive and far-reaching measures to reduce CO<sub>2</sub> emissions and to improve ships' efficiency. This fact must be reflected in the EU draft directive on the monitoring, reporting and verification (MRV) of CO<sub>2</sub> emissions in maritime transport. The EU should draw the appropriate conclusions from the problems experienced over international implementation of the ETS. There must be no unilateral introduction of CO<sub>2</sub> limits or unilateral inclusion of maritime transport in European emissions trading. Any solution has to go through the International Maritime Organisation (IMO). In any event the administrative cost to shipping companies of implementing a CO<sub>2</sub> monitoring and reporting system must be reduced to a minimum.



### Push for Europe-wide fitting of brakes on goods wagons.

The payment conditions for co-financing of the retrofitting of brakes on the existing wagon fleet in rail transport by the EU must be clarified and applied quickly. On top of this the EU must create additional incentives for Europe-wide retrofitting in order to ensure that all the constituent wagons of a goods train of international composition drive with »quiet« brakes.

The German government and the German railway industry have declared their support for noise remediation by

2020. The most efficient way to reduce noise levels is to replace cast iron brakes with composite brakes as this tackles the problem at source and therefore has an area-wide effect. To reduce the noise produced by rail freight noticeably, all foreign wagons operating in Germany must be retrofitted. This will require adequate financial incentives through a new EU funding programme. A first step has already been taken with the introduction of 20 % co-financing of retrofitting with brakes within the framework of the Trans-European Transport Networks.

# STRENGTHEN LOGISTICS INDUSTRY

The European logistics industry earns 930 billion euros and transports 18 million tonnes of goods every year. Europe's logistics are among the world's best and connect European companies with their customers world-wide. As not all raw materials and products can be transported by a single mode of transport, road, rail, air and maritime transport all contribute specific strengths to the overall system. In this connection multimodal transport constitutes an important element of cross-border transport.

Before the transport markets are opened up any further, the existing EU legislation must be implemented uniformly in all

the EU member states. Further liberalisation must be tackled with a sense of proportion so as to avoid harming functioning freight transport markets. Where markets have been opened up, for example, in the parcels area, the result has already been more competition and hence lower costs. This should not be jeopardised through overregulation.

Security is a foremost concern for the transport industry. If transport is to be free of security concerns, global business requires international standards. However, different requirements in relation to security systems must not result in impediments to trade.



### **Don't weaken the logistics sector through excessive regulation.**

Logistics is essentially an entrepreneurial sphere of activity. The sole objective of the EU's freight transport policy should therefore be to set the framework for this industrial sector to develop efficiently and in line with demand and ensure a level playing field for European companies in the international competition. EU regulation must be confined to setting suitable framework conditions for an efficient logistics industry.

### **Provide further support for combined transport.**

Financial support for the expansion of terminal infrastructure is particularly important – contributions towards operating costs have not worked well in the past. Above all the EU has the

important task of identifying and publishing best practices, promoting cross-border projects and eliminating gaps in national funding programmes. The cross-border combined transport of goods still has plenty of growth potential due to the increasing trend for intensively dividing work between the industrial locations of Europe.

### **Ensure that port regulation and state aid guidelines are in line with market requirements.**

To promote online trading and reduce the cost of transporting goods cross-border, customs and tax law framework conditions and consumer protections must be harmonised and existing regulations on the EU single market must be implemented in exactly the same way in all the EU member states.



### Keep parcels market open to free competition.

Due to the liberalisation that has already taken place, the parcels market in the EU is already subject to strong competition in the member states and across borders. Both former state postal enterprises / universal service providers and classic courier express parcels service providers are active in the market. Margins are low, indicating that the market is working well. There is therefore no need for state intervention in this market. The regulatory interventions envisaged in the EU Commission's Green Paper, such as the specification of maximum prices, product standards and minimum services, would have the effect of raising costs and stifling innovation.

An exception needs to be made for handling services in the EU Commission's present proposed directive on port services as a matter of principle. This will enable the debate about the so-called port package, which has been going on for years, to finally be concluded. It is also essential that port handling charges are not subject to price regulation. The market works – this fact should also be reflected in the announced progress report.

In addition, the forthcoming review of the guidelines on state aid must not call into question adequate and efficient structures for infrastructure financing in the EU member states. There must be a clear distinction between port infra-

structure and port suprastructure. The provision of the general infrastructure is a public duty; public funds spent on general port infrastructure do not therefore constitute subsidies.

### **Ensure that the same security measures apply world-wide.**

Security standards for deliveries from non-EU states must be gradually brought into line with the high EU standards. The concept of the secure transport chain is established in the EU. Security regulations must not lead to new trade barriers in the European single market. Rather, existing systems (such as driver identification systems) should be used to further improve the security of the transport chain. Counterterrorism is a state responsibility. Existing uncertainties in the interpretation of existing recipro-

cal initiatives (e.g. AEO and C-TPAT) must be resolved.

The European Commission's action in setting up a group of experts on protective measures in land transport was a sensible step. Regular exchange of information between all the relevant players can raise the level of security and improve resilience to attacks without imposing excessive requirements on industry. Moreover, industry expects the EU Commission and the EU member states to carry out a risk analysis so that it can fulfil the prescribed protection objectives with risk-based approaches.

### **Avoid regulatory overlap in the area of IT security.**

Before introducing new duties on companies regarding the provision of infor-



mation to EU institutions, existing data flows to national authorities should be analysed. In this way duplication of reporting can be avoided. In this connection special attention should be paid to data protection.

In parallel to the German legislative proposal to increase the security of information systems the European Commission has unveiled a proposal on cyber security. It contains a series of measures, some of them in the area of transport, aimed at increasing network security. For example, there is a duty to report attacks. National legislative processes that have begun in parallel, such as in Germany, should be included early

on in the European discussion. Otherwise there is a danger that German companies may be hit by unnecessary additional expense, for example, on organisational shake-ups, security audits or user information services, without any gain in security. Companies that already report on a voluntary basis and attain a reasonable level of security by the standards of the draft legislation, would be particularly badly hit.

# DRIVE FORWARD DIGITAL NETWORKING

The European single market should simplify cross-border mobility as the distances travelled are steadily increasing. Digital information systems are helping to make transport efficient, secure and reasonably priced despite the increasing distances involved. A clear division of tasks between the public sector and private industry is required here.

Transport companies face the challenge of how to guarantee high quality transport despite the growing intensity and complexity of transport processes and are at pains to ensure that passenger rights are retained. However, the EU standards must keep the responsibilities

of transport companies within reasonable bounds, for example, in the event of traffic disruptions due to force majeure.

European cities are heterogeneous and have evolved over a long period of time, their structures and needs are known locally – so there can be no single, generally valid solution to local traffic problems such as traffic jams or toxic emissions. EU stipulations therefore need to be practicable and must not lead to disproportionate financial or bureaucratic expense.



### Support cross-border travel.

In the mobility area the EU should support »best practices« among cross-border information and booking offerings from different transport providers. But under no circumstances should it intervene in the existing market process through the imposition of mandatory standards or similar active measures. EU initiatives such as the Multimodal Journey Planner must therefore be implemented in close consultation with transport companies. In this context existing information and ticketing systems and existing cooperation between companies should be borne in mind.

### Create standard interfaces for intelligent transport systems.

When it comes to implementing the EU directive on the introduction of ITS in road transport, the European Commission must confine itself to technical

subjects and standards and not make mobility any more expensive.

The success of measures such as eSecurity or GALILEO will also depend on customers' assessment of the costs and benefits, and this must be taken into account when developing and marketing innovative products and services. When it comes to national implementation of the ITS directive, care must be taken to ensure that functioning collaboration between transport companies and service providers is not eroded and national legal standards do not become overly bureaucratic and intransparent.

### Make transport information available, extend open data approach.

In particular, state agencies must provide more information to ensure that data quality is high.



Citizens and companies need up-to-date information on the traffic situation and forecasts that are as accurate as possible for their mobility decisions. The open data approach will enable traffic data to be provided, evaluated and processed Europe-wide and made available as information across national, transport provider and company boundaries, at the same time taking due account of data protection issues.

### **Design urban transport locally and avoid overregulation.**

Towns and municipalities are best placed to decide what measures are suitable to guarantee efficient and capable transport services. However, there is a need for a minimal measure of harmonised

rules to prevent local requirements resulting in new obstacles in the common single market. The EU should concentrate on creating suitable framework conditions. This includes promoting the exchange of experience between the various players, financial support for innovative transport projects, the funding of research and better coordinated cooperation at all levels of the state and with industry.

Access restrictions for inner cities must be harmonised so that citizens and logistics companies can benefit Europe-wide from standard framework conditions, e.g. as regards emission requirements for vehicles or identification requirements.

### Implement European emergency call system e-Call, build up infrastructure.

Work must start without delay on building up the infrastructure basis for forwarding emergency signals. When it comes to determining the requirements that vehicles must satisfy, systems already found in the market should be taken into account.

The European Commission's proposal that the e-Call electronic emergency call system should be installed in all new vehicle models constitutes an important step in the direction of improving accident management and transport safety on Europe's roads. Automatic emergency calls are important in ensuring that in the event of an accident help is requested immediately on the basis of precise vehicle positioning information. The EU institutions

have agreed that the emergency call system should be established in the member states no later than 1 October 2017.

### Maintain a balanced in defining EU's passenger rights.

The European Commission has proposed a package of measures aimed at improving the rights of European air passengers. The proposed legislation is equally important to passengers and airlines as it is intended to remove legal uncertainties and close some regulatory gaps. However, the proposed threshold of five hours before compensation has to be paid in case of delay should not be made any tougher. Passenger rights must be implemented consistently in all member states and for all business models. It should be borne in mind that Germany has created a legal framework that also includes air transport in a



have been booked in the travel agency. Moreover, a package holiday or a connected travel arrangement does not exist where consumers merely click through from the website of one provider to that of another without this resulting in any transfer of customer data.

voluntary arbitration procedure governed by private law. To avoid new distortions of competition, arbitration procedures should be introduced EU-wide in air transport.

### Revise Package Travel Directive.

The overhaul of the EU directive should take into account how very important online bookings have become. When implementing this reasonable objective, the liability of the middleman must not be greater in the case of online, self-assembled trips than liability in the case of comparable services that traditionally

### Exempt rail companies from liability in case of force majeure.

The legal text of the directive on passenger rights in rail transport must contain an exclusion of liability in the event of force majeure, explicitly and with legal certainty. For public transport it would be financially unacceptable if transport companies had to pay consequential damages to passengers in every instance of storm damage, accidents and similar circumstances.

# COMPLETE EUROPEAN SINGLE MARKET

Single markets require a single set of rules. This applies equally to the rail sector. Within Europe there are still considerable discrepancies between national markets, for example in rail transport. We are still a long way away from having the same conditions of competition across Europe.

There is also an undeniable need for harmonised framework conditions for all companies beyond Europe. The unilateral opening of the EU market to competitors from non-EU states dam-

ages not just European companies but also national economies and ultimately the entire EU. Thus, for example, intransparent security requirements are impeding market access for European railway companies in Japan.

In the global competition Europe must act as one and systematically dismantle barriers to competition in the single market. European liberalisation is a process that must not stop at the bilateral level.



### **Drive forward technical harmonisation in EU rail transport.**

For cross-border transport the European security certificate and the European train approval process must be introduced as quickly as possible. To this end the technical portion of the so-called fourth railway package must be agreed on quickly and independently of the political portion.

The European rail market is fragmented and characterised by national protectionism. Up to now national requirements have prevented cross-border rail transport or have made it a lot more expensive. The proposals of the European Commission in the fourth railway package for the further liberalisation of the rail transport market in Europe contain

a technical part and a political part.

There is agreement on the technical part, which is intended to harmonise more than 11,000 different regulations in the EU member states. These regulations must be detached from the controversial political part and negotiated speedily.

### **Create discrimination-free market access for rail transport.**

The success of the single European rail market will be decided by discrimination-free network access and operation for all participants, not by the form of business organisation of the transport company. The EU must establish strong and effective regulation as a guarantee of fair competition and not be overly prescriptive as regards the manner in



which network and transport are organised, with sufficient leeway for well functioning national solutions.

In the international context the EU must engage more offensively for fair competition conditions and adopt a stronger position on transparent tendering procedures in the negotiations on trade agreements with non-EU states. Up to now there has not been sufficient transparency over the tender processes in non-EU states. Above all, safety requirements are perceived as barriers to market access. The relevant

standards have not yet been adequately defined, so that European providers cannot respond appropriately to invitations to tender and are effectively excluded. Conversely, international providers have for long been able to bid in European markets.

### **Create fair conditions of competition in air transport.**

The EU must make its contribution towards ensuring that European airlines and airports remain internationally competitive and can continue to participate in the growth of global air trans-

port in the future by adopting a stringent and comprehensive strategy. In the single market adherence to the rules on subsidies must be strictly observed. The EU must push for intra-European consolidation of the air transport industry and efficiency improvements (e.g. as per the Single European Sky). Furthermore, the EU must champion the expansion of infrastructure in line with demand and competitive operating hours at Europe's airports and eliminate unilateral burdens on European airlines.

These measures are extremely urgent, because Europe as an air transport location faces serious challenges from competitors in non-EU states. The European Commission has correctly noted that growth in global air trans-

port is moving away from Europe and towards the Gulf region. The expansion of air transport hubs in the Gulf region is based on massive expansion of infrastructure, state protection and subsidisation. Bearing in mind the liberal air transport external policy pursued up to now, the EU must pay close attention to ensuring that European airlines and airports are not placed at a competitive disadvantage.

### **Harmonise legal framework for new technologies.**

The European Commission must support international standards in the transport sector more vigorously.

The agreement on the type 2 plug for electric vehicles, which is to become



mandatory within three years of the entry into force of the corresponding EU directive, is a positive example. In order to be able to bring innovations into the market, technical standards must be negotiated and introduced early on.

### **Implement Shift2Rail public-private research initiative speedily.**

The Shift2Rail joint undertaking must be implemented systematically and with the involvement of all the relevant players.

The initiative, which has a budget of almost a billion euros, can contribute significantly to strengthening the com-

petitiveness of the European railway industry. The Shift2Rail joint undertaking will be funded partly by the European Commission and partly by the rail sector. It is expected to result in innovation advances for the rail industry, a significant reduction in the system costs of rail transport and an increase in capacity of the rail system.

# GERMAN TRANSPORT FORUM

## Our mission

The Deutsches Verkehrsforum (German Transport Forum) is the only multi-modal industry association in Europe. As the lobby for all modes of transport, we provide stimuli for the political decisionmakers. In Berlin and Brussels, we proactively promote competition and the elimination of red tape.

In constant dialogue with politicians, scientists, the media and the public at large, the German Transport Forum is a dynamic stimulus provider, competent knowledge manager and politically independent platform rolled into one. We see our role as that of an »advocate for mobility« and promulgate an integrated transport system that is efficient, customer-oriented, affordable,

resource-saving and eco-friendly. In order to safeguard and improve mobility, about 170 German and European member companies and associations have joined forces in the German Transport Forum.

## Our aims

Our overall aim is to enhance public awareness of the economic, political and social potential of mobility and to improve the framework conditions for the transport industry.

The German Transport Forum establishes a link between the transport industry and other sectors of the economy. Experienced, high-calibre industry representatives contribute to our work. This allows us to act as a knowledge man-

ager that consolidates, evaluates and imparts information and knowledge. At the intersection between business, politics and science, we create opportunities for dialogue relating to all aspects of mobility.

- To obtain recognition for the key importance of mobility by politicians and society
- To safeguard and further develop a competitive and efficient transport infrastructure
- To establish intelligently-networked transport systems that fully utilise the synergy potential and specific strengths of individual transport providers
- To ensure fair competitive conditions for all transport providers at national and international level
- To provide customer-oriented and integrated mobility solutions
- To promote mobility-oriented research and prompt implementation of research results
- To protect the global climate by reducing emissions, increasing efficiency and using resource-saving technologies.

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**Dr. Florian Eck:** Deputy Managing Director

**Rainer Schätzlein:** Director for Air Transport, Ports & Shipping, Road Transport

**Sarah Stark:** Director for European Politics, Rail Technology

# MEMBERS

## A

- AAE Ahaus Alstätter Eisenbahn Holding AG, Baar (CH)
- ACV Automobil-Club Verkehr e.V., Köln
- ADAC e.V., München
- adesse anwälte, Berlin
- AD HOC European Relations, Gütersloh
- AGES International GmbH & Co. KG, Langenfeld
- Air Berlin PLC & Co. Luftverkehrs KG, Berlin
- Airbus Operations GmbH, Hamburg
- ALSTOM Transport Deutschland GmbH, Salzgitter
- Andreas Schmid Logistik AG, Gersthofen
- ARS Altmann AG, Wolnzach
- Arthur D. Little GmbH, Frankfurt/M
- A.T. Kearney GmbH, Berlin
- AUDI AG, Ingolstadt
- Autobahn Tank & Rast Holding GmbH, Bonn
- Autohof – Tanken – Rasten – Parken eG, Herbolzheim

## B

- Bain & Company Germany, Inc., Düsseldorf
- BearingPoint GmbH, Frankfurt/M
- Berliner Verkehrsbetriebe (BVG), Berlin
- Bilfinger SE, Mannheim
- BLG Logistics Group AG & Co. KG, Bremen
- BMW AG, München
- Boeing Operations International, Inc., Berlin
- Bombardier Transportation GmbH, Berlin
- Booz & Company GmbH, Düsseldorf
- BP Europa SE, Hamburg
- BPW Bergische Achsen KG, Wiehl
- bremenports GmbH & Co. KG, Bremen
- Brunsbüttel Ports GmbH, Brunsbüttel
- Buss Port Logistics GmbH & Co. KG, Hamburg

## C

- Captrain Deutschland GmbH, Berlin
- CMS Hasche Sigle Partnerschaft von Rechtsanwälten und Steuerberatern mbB, Berlin
- COMMERZBANK AG, Frankfurt/M
- Container Terminal Wilhelmshaven JadeWeserPort-Marketing GmbH & Co. KG, Wilhelmshaven
- CSC Deutschland Solutions GmbH, Wiesbaden

## D

- Daimler AG, Stuttgart
- DAKOSY Datenkommunikationssystem AG, Hamburg
- DEKRA e.V., Stuttgart
- Dettmer Group KG, Bremen
- Deutsche Bahn AG, Berlin
- Deutsche Bank AG, Frankfurt/M
- Deutsche Energie-Agentur GmbH (dena), Berlin
- Deutsche Lufthansa AG, Frankfurt/M
- Deutsche Post AG, Bonn
- DEVK Allgemeine Versicherungs-AG, Köln
- DFDS Seaways GmbH, Cuxhaven
- DFS Deutsche Flugsicherung GmbH, Langen

- DHL Freight GmbH, Bonn
- DLR Deutsches Zentrum für Luft- und Raumfahrt, Köln
- Dornier Consulting GmbH, Berlin
- Drewes GmbH & Co. Investitions-KG, Bremen
- DVB Bank SE, Frankfurt/M
- DVV Media Group GmbH, Hamburg
- Dyckerhoff GmbH, Wiesbaden
- DZ BANK AG, Frankfurt/M

## E

- Ernst Frankenbach GmbH, Mainz-Kastel
- Ernst & Young GmbH Wirtschaftsprüfungsgesellschaft, Stuttgart

## F

- Fichtner Water and Transportation GmbH, Stuttgart
- FIEGE Logistik Holding Stiftung & Co. KG, Greven
- Flughafen Berlin Brandenburg GmbH, Berlin
- Flughafen Düsseldorf GmbH, Düsseldorf
- Flughafen Hamburg GmbH, Hamburg
- Flughafen Köln/Bonn GmbH, Köln
- Flughafen München GmbH, München
- Fraport AG, Frankfurt/M
- Fraunhofer-Arbeitsgruppe für Supply Chain Services (SCS), Nürnberg

## G

- GEFCO Deutschland GmbH, Mörfelden-Walldorf
- Gerd Körner Consulting KG, Weiterstadt
- GOMULTIMODAL GmbH, Hamburg
- Gütegemeinschaft AKB für Asphalt-Kaltbauweisen zur Erhaltung von Straßen e.V., Ahnatal

## H

- HaCon Ingenieurgesellschaft mbH, Hannover
- Hafen Hamburg Marketing e.V., Hamburg
- Hamburger Hafen und Logistik Aktiengesellschaft, Hamburg
- Hamburg-Köln-Express GmbH, Köln
- Hamburg Port Authority AöR, Hamburg
- Hamburg Südamerikanische Dampfschiffahrts-Gesellschaft KG, Hamburg
- Hauptverband der Deutschen Bauindustrie e.V., Berlin
- Hellmann Worldwide Logistics GmbH & Co. KG, Osnabrück
- Hermes Transport Logistics GmbH, Hamburg
- HFK Rechtsanwälte LLP, Frankfurt/M
- HOCHTIEF Aktiengesellschaft, Essen
- HOLM GmbH (House of Logistics & Mobility), Frankfurt/M.
- Horst Mosolf GmbH & Co. KG, Kirchheim/Teck

## I

- IAV GmbH Ingenieurgesellschaft Auto und Verkehr, Berlin
- IBM Deutschland GmbH, Ehningen
- IMPERIAL Logistics International B.V. & Co. KG, Duisburg

- Ing.-Büro Dipl.-Ing. H. Vössing GmbH, Düsseldorf
- Institut für Seeverkehrswirtschaft und Logistik (ISL), Bremen
- Iveco Magirus AG, Unterschleißheim

#### J

- JadeWeserPort Realisierungs GmbH & Co. KG, Wilhelmshaven

#### K

- KfW IPEX-Bank GmbH, Frankfurt/M
- KG GEKOL Mineralölhandel GmbH & Co., Hamburg
- Kienbaum Consultants International GmbH, Düsseldorf
- Knorr-Bremse AG, München
- KombiConsult GmbH, Frankfurt/M
- Kombiverkehr KG, Frankfurt/M
- KRAVAG-SACH Versicherung des Deutschen Kraftverkehrs VaG, Hamburg
- Kühne + Nagel (AG & Co.) KG, Hamburg

#### L

- Landesbank Hessen-Thüringen Girozentrale, Frankfurt/M
- Leipziger Messe GmbH, Leipzig
- Leipziger Verkehrsbetriebe (LVB) GmbH, Leipzig
- Linklaters LLP, Berlin
- LNC LogisticNetwork Consultants GmbH, Hannover
- Lokomotion Gesellschaft für Schienentraction mbH, München
- Lübecker Hafen-Gesellschaft mbH, Lübeck

#### M

- Magdeburger Hafen GmbH, Magdeburg
- MAN Truck & Bus AG, München
- Max Aicher GmbH & Co. KG, Freilassing
- McKinsey & Company, Inc., München
- Messe Frankfurt Venue GmbH, Frankfurt/M
- MEV Eisenbahn-Verkehrsgesellschaft mbH, Mannheim
- Michelin Reifenwerke AG & Co. KGaA, Karlsruhe
- Mitteldeutsche Flughafen AG, Leipzig
- M&M Militzer & Münch Deutsche Holding GmbH, Hof
- M. M. Warburg & CO KGaA, Hamburg
- MTU Aero Engines AG, München

#### N

- Neuss-Düsseldorfer Häfen GmbH & Co. KG, Neuss
- NIIT Technologies GmbH, Stuttgart
- NILES-SIMMONS-HEGENSCHEIDT GmbH, Chemnitz
- North Sea Terminal Bremerhaven GmbH & Co., Bremerhaven

#### O

- OBERMEYER Planen + Beraten GmbH, München
- Olswang Germany LLP, Berlin
- On Rail GmbH, Mettmann

#### P

- PANALPINA Welttransport (Deutschland) GmbH, Mörfelden
- PERSONALUNION, Hamburg
- PLANCO Consulting GmbH, Essen
- Plasser & Theurer GmbH, Wien
- Port of Rotterdam, Rotterdam
- PricewaterhouseCoopers AG WPG, Frankfurt/M
- PUTZ & PARTNER Unternehmensberatung AG, Hamburg

#### R

- Railistics GmbH, Wiesbaden
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- RMV Rhein-Main-Verkehrsverbund GmbH, Hofheim
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- Rödl & Partner GbR Wirtschaftsprüfer Steuerberater Rechtsanwälte, Nürnberg
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- Rolls-Royce Deutschland Ltd. & Co. KG, Dahlewitz

#### S

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- Schenker Deutschland AG, Kelsterbach
- Schnellecke Group AG & Co. KG, Wolfsburg
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- Seehafen Wismar GmbH, Wismar
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- Steinbrück Omnibusbetrieb und Reisebüro, Gotha
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- TFG Transfracht Internationale Gesellschaft für kombinierten Güterverkehr mbH, Frankfurt/M
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- ThyssenKrupp AG, Essen
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- TransCare GmbH, Wiesbaden
- TransInvest Holding AG, St. Gallen
- T-Systems International GmbH, Frankfurt/M.

#### U

- UNION TANK Eckstein GmbH & Co. KG, Kleinostheim
- UNITI Bundesverband mittelständischer Mineralölunternehmen e.V., Berlin
- UPS Transport OHG, Neuss

#### V

- VDA Verband der Automobilindustrie e.V., Berlin
- VdTÜV - Verband der TÜV e.V., Berlin
- VDV Verband Deutscher Verkehrsunternehmen, Köln
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- Volkswagen Logistics GmbH & Co. OHG, Wolfsburg
- VTG Aktiengesellschaft, Hamburg

#### W

- Wagener & Herbst Management Consultants GmbH, Potsdam
- Wallenius Wilhelmsen Logistics Germany GmbH, Lehrte
- Wilmer Cutler Pickering Hale and Dorr LLP, Berlin

#### Z

- ZDS Zentralverband der Deutschen Seehafenbetriebe e.V., Hamburg
- Zentralverband Deutsches Kraftfahrzeuggewerbe e.V. (ZDK), Bonn

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