



Agenda
Mobility for Europe >

Position paper

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Mobility for Europe



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Today Germany and Europe are inseparable. Nowhere is this more apparent than in the area of transport. Thanks to its geographic location, economic strength and efficient transport companies, Germany has developed into a leading mobility location:

- > Germany's population of 82 million people, with an average per-capita annual income of over 40,000 euro, represents a large and lucrative market.
- > German locations offer easy access to neighbouring markets in the 27 EU member states, with their 497 million inhabitants and gross domestic product of 12,500 billion euro.
- > In 2008, Germany exported goods to the value of 633 billion euro to EU markets and imported goods valued at 478 billion euro from the EU.

Mobility is not only a basic need for people, but it is also a prerequisite for prosperity and employment. However, this success should not be taken for granted. If Europe is to continue to survive despite increasingly tough global competition between business locations, mobility must be improved as a location factor. We therefore call

on the decision-makers of the European Union to prioritise the further development and promotion of sustainable mobility.

Europe-wide solutions are required to

- > ensure future-proof, affordable mobility;
- > strengthen the innovative potential of companies and their ability to compete;
- > retain Europe's technology lead in the mobility sector;
- > improve the competitiveness of European enterprises;
- > stimulate growth and create employment;
- > keep Europe ahead when competing globally.

To this end, our »Mobility for Europe« agenda encompasses five areas for action:

- > Expand infrastructure – optimise networking
- > Reduce bureaucracy – scale back regulation
- > Extend harmonisation – step up liberalisation
- > Ensure sustainability – conserve resources
- > Promote key technologies – strengthen location

The transport industry in Germany acknowledges its responsibilities within Europe and is willing to play its part in finding solutions – to the benefit of Europe and Germany alike.



Expand infrastructure – optimise networking

An efficient and demand-driven infrastructure is crucial if Europe is to remain an attractive, competitive location and the global division of labour is to be used to Europe's advantage.

The enlarged EU has around 5 million kilometres of road, about 215,000 kilometres of rail track and some 43,000 kilometres of inland waterways. All of this needs to be interconnected, as must Europe's airports, seaports and inland harbours. The strengths of Europe's individual regions must be networked via development axes.

All transport providers are needed to create an efficient European transport market. They need to pool their strengths as integrated partners working together on the basis of co-modality in a common European transport system.

Interoperability must be seen not only in a European perspective but also as a means of opening up global markets. It is a vital feature of modern transport technologies and must be backed politically and administratively.

Call for action

Provide adequate co-financing for Trans-European Transport Networks (TEN-T). The sources of finance available for the TEN-T projects are inadequate. The total cost of the 30 priority TEN-T projects is put at over 250 billion euro, but investment at national level is declining.

The proposed co-financing using European funds is also inadequate. The financial plans allow for only around eight billion euro for TEN-T projects between 2007 and 2013. As well as increased financial support from the member states, substantial, goal-directed co-financing of TEN-T projects by the EU is essential if there is to be a realistic prospect of implementing these important projects.

Match TEN-T closely to European needs and set priorities. As part of the review of TEN policy, greater emphasis must be placed in future on expanding Europe's main transportation axes, eliminating bottlenecks from important traffic nodes and improving interfaces with the world market. This means:

> In road transport – increase the capacity of the main north-south arterial routes and expand the east-west axes. The bottlenecks in the trans-European road network must be eliminated. The European Commission must implement a change of direction in favour of directing investment towards improving the efficiency of the road infrastructure. In the centrally located member states, in particular, capacity must be increased to accommodate rising demand. The efficiency of

the core routes of the trans-European networks must also be improved through investment in telematics.

- > In rail transport – expand the overall capacity of the European network and eliminate bottlenecks through demand-driven development of rail traffic nodes. The available financial resources must be concentrated on those rail transport corridors in which traffic is expected to grow the most, e.g. the Rotterdam-Genoa TEN-T corridor.
- > In air transport – strengthen European hubs. Massive infrastructure investment in other world regions (e.g. the Gulf states) is fuelling a shift in international passenger and cargo flows. In Germany and Europe, public planning and financial resources need to be concentrated more heavily on economically viable airports. Major airport hubs must be expanded as a matter of urgency.
- > In maritime transport – implement the »motorways of the sea« and expand the hinterland connections of North Sea and Baltic Sea ports in order to strengthen Europe as a maritime location.

Urgently implement the Single European Sky.

Harmonisation of air traffic control in a Single European Sky will reduce the need for detours and aircraft holding patterns, save fuel and ease the impact of air traffic on the environment. The Single European Sky has a vital contribution to make to climate protection. The Single European Sky Air Traffic Management Research (SESAR) technology programme, the Functional Airspace Blocks (FAB) and other measures contained in the Single European Sky II legislative package must therefore be implemented without delay.

Further develop »co-modality«. The European Commission's strategy of the »efficient utilisation of the different transport modes in separate or multimodal

use« (co-modality) must be turned into reality. Each mode of transport must bring its particular strengths into the transport system with a view to improving overall efficiency. In the intermodal transport chain, passage from one mode to another is of pivotal importance. Investment in seaports and hinterland connections and the establishment of intermodal terminals along the central corridors must therefore be stepped up.

Create seamless international transport. To eliminate historic system breaks in the chain, the interoperability of the international rail network must be improved – above all through financial backing for the European Train Control System (ETCS) and the European Railway Traffic Management System (ERTMS). The EU must also press ahead with appropriate regulations facilitating the interoperability of toll systems in Europe. Cross-border road haulage traffic should not be impeded by the system limits of national toll collection systems. One important instrument here is the standard European Electronic Toll Service (EETS).

Proactively support mobility in cities. Bearing in mind the principle of subsidiarity, all the measures contained in the EU Green Book »Towards a new culture of urban mobility« must be clearly oriented in line with the competencies of the three players: the EU, the municipalities and the transport companies. We call on the EU to support the exchange of information between cities, to network public bodies, promote research and harmonise standards. The cities and municipalities must optimise the infrastructure for all users, secure the supply function and improve their planning. The transport industry must increase its level of vehicle utilisation, continue the work of developing environmental technologies and promote corporate mobility management.

Reduce bureaucracy – scale back regulation

The Europe of the future must not be stifled by bureaucracy. It must revitalise the liberal thinking of its founders and work towards less red tape, more devolved responsibility, uniform market access and a smaller role for the state.

In the spirit of the EU initiative to simplify and improve law-making, neither individuals nor industry should be saddled with new, expensive administrative hurdles. In fact, certain areas should even be removed from the scope of EU regulation.

Requirements imposed by EU regulations must be practicable and not lead to disproportionate expense in terms of time and costs, e.g. in the construction of transport infrastructure. For example, in Germany the public hearings on land use for rail infrastructure projects last on average between 18 and 24 months, while a further 30 months or so is required to obtain planning permission, including building permission. The planning and preliminary procedures involved in expanding airports take even longer. These time spans should be reduced where possible through more practical European requirements and their proper implementation.

Call for action

Continue to reduce bureaucracy. European authorities must adapt their role in a mobility market characterised by intensive competition. The EU administration must resist the temptation of attempting to control competition through regulations. Competition between companies must be decided by performance and quality, not by regulation.

Repeal unnecessary EU legislation. The EU Commission's initiative to cut back red tape must be implemented swiftly. According to the EU, this could reduce industry's administrative costs by 25% by 2012, which would have the effect of boosting gross domestic product by 1.4 percent. Those savings would come primarily from repealing unnecessary EU laws and avoiding the duplication of EU and national regulations.

Avoid weakening the logistics sector through excessive regulation.

Logistics is essentially an entrepreneurial sphere of activity. Regulation by the state should be confined to the creation of suitable underlying conditions for an efficient logistics industry. Implementation of the »Freight Transport Logistics Action Plan« announced by the European Commission in 2007 must be geared towards

- > defining a framework for the demand-driven and efficient development of this industry sector and
- > guaranteeing a level playing field for German companies competing in Europe.

If the initiatives derived from the Action Plan do not result in harmonisation, standardisation and liberalisation of European freight haulage, adjustment will be required.

Strengthen the effectiveness of national regulatory agencies. National regulatory agencies in the other European member states must also be given powers similar to the ones they have in Germany so as to ensure that fair market access conditions prevail.

Establish an effective and unbureaucratic security regime. It is the EU's responsibility to consolidate the wide range of international regulations introduced to protect the transport sector against terrorist attacks, thereby creating a uniform security regime.

The EC draft Regulation on »Enhancing Supply Chain Security« is not suited to achieving that aim. This impractical and ineffective legislative initiative is rejected because

- > it does not adequately take into account international solutions already in the pipeline and the existing global security architecture;
- > companies would be exposed to the indiscriminate imposition of unacceptable costs and red tape resulting from the certification process, coupled with excessive investment expense. 100% implementation of the EU Regulation on supply chain security would burden the European economy with one-off costs of 61.3 billion euro and additional annual follow-on costs of 47.9 billion euro.

There is no need for further security regulations. Rather, the numerous existing global, European and national provisions and regulations need to be consolidated or mutually recognised so that the European Commission's goal of making freight logistics in Europe more efficient is not impeded.

Implement »one stop security« and a risk-based approach to supply chain security. The cost-benefit ratio of proposed new security regulations must be rigorously scrutinised in advance (risk assessment / impact analysis). The transport sector urgently needs an internationally consolidated security strategy, and uniform regulations and standards. The authorities must contribute towards the cost of counter-terrorism measures and sponsor technologically innovative solutions.

Extend harmonisation – step up liberalisation

Single markets require a single set of rules. The same is true of the European transport market, in which significant discrepancies still prevail between national markets. The harmonisation of competitive conditions in Europe is nowhere near complete.

It is imperative that internationally harmonised operating conditions are in place for all the market players. Market access, fiscal burdens and regulative constraints are just a few of the areas in which competition in Europe is distorted by the absence of a level playing field. Often such inequalities result in avoidable inefficiency in transport operations – and thus to considerable economic damage to companies, national economies and the entire EU.

Europe must act as one when competing globally, systematically dismantling barriers in the single market. European liberalisation is a process that rests on commonality and must not stop short at the bilateral level.

Only by opening up transport markets in Europe that are linked by seamless transport connections can the full potential of a single European market be realised. The competitiveness of the European economy in the global framework and implementation of the aims of the Lisbon agenda must be treated as top priorities.

Call for action

Harmonise tax and regulatory regimes. Discrepancies in the fiscal burdens imposed by different EU member states must, in particular, be reduced. It is essential, for example, that taxes on the purchase and maintenance of vehicles are harmonised Europe-wide without increasing the overall tax burden on consumers.

Implement EU regulations uniformly. To this end, the European Commission must step up political pressure on all the member states. Immediate action is required concerning the liberalisation directives on rail freight transport, which in practice are interpreted in a widely divergent manner in different EU states.

Open up Europe's national transport markets. Liberalisation should be pursued judiciously so as to open up market opportunities for companies in Europe without endangering their competitiveness.

The rail networks in all EU member states must, without discrimination, be opened up as quickly as possible – through uniform implementation of existing EU regulations and accelerated EU legislation.

The liberalisation of European rail transport markets must not be allowed to lag behind the deregulation already implemented in Germany. The European Commission must therefore

- > urgently present a proposal for the rapid deregulation of national passenger rail transport markets and
- > insist that EU member states implement the deregula-

tion directives on freight transport from the Railway Packages in a uniform manner.

Facilitate fair competition in air transport. The EU must continue to act consistently in enforcing market regulation, i.e. ensure fair market access and prevent inefficient market players from being granted subsidies or protection. A fair competition framework should also be observed in relation to third-party states. Inconsistencies in the terms under which airlines operate in international markets must be eliminated.

Adopt standard funding guidelines for European sea ports. Such action on the part of the European Commission will have the effect of supporting fair competition in this sector without calling into question the efficient and market-driven structures that already exist.

Harmonise certification procedures for railway rolling stock. As a first step, a European framework must be established to permit mutual recognition of national procedures for the certification of rolling stock. If market barriers are to be dismantled, the inspection remit of the national certification authorities must be minimised, transparency must be created and the length of time it takes to make important decisions shortened.

The amended versions of the interoperability and security directives should be welcomed as a first step. The next step in this connection must be to seek clarification on the subject of control technology, e.g. the on-board unit for ERTMS.

In the medium term, the EU must establish a single market for rolling stock vehicles and their components in which certification processes and test procedures are uniform, certifications are mutually recognised and market barriers are dismantled.

Ensure sustainability – conserve resources

Protection of the global climate is of unique importance in preserving the natural environment in which we live. The transport industry in Europe is making a lasting contribution to climate protection by cutting its consumption of energy and fossil fuels and reducing emissions.

Germany is setting the pace in the application of transport technologies that are economic in their use of resources. For example, in 2008 German manufacturers reduced CO₂ emissions by 3.4% compared with the previous year, thereby achieving above-average success.

In Germany, it has been possible to decouple growth in traffic volume from growth in emissions, above all through constantly improved technologies, systematic investment in transport infrastructure and optimised transport processes, but also through entrepreneurial initiative on the part of transport companies and vehicle manufacturers. The same approach should be adopted Europe-wide.

Climate protection measures should not be allowed to put Europe at a disadvantage when competing globally as a location – European, let alone insular, national solutions have only a limited impact on the environment and often distort competition. In the final analysis, the sustainability of the overall system should be weighed against its cost-benefit aspects and climate policy measures should be concentrated where they are most effective.

Call for action

Develop economically meaningful solutions for climate protection. To achieve effective climate protection, precedence on environmental issues must be given to economically meaningful solutions that genuinely reduce emissions. These include, above all, technological innovations which reduce emissions at source, the targeting of bottlenecks in the transport infrastructure, improved operational processes, and the optimisation of interfaces between different transport modes.

Demand-driven expansion of airports can eliminate aircraft holding patterns and detours, thus reducing fuel consumption and emissions. Demand-oriented expansion of rail capacity, elimination of existing bottlenecks and segregation of different types of rail transport, with some lines dedicated to fast trains and others to slower trains, will also lead to significant savings in fuel and electrical energy.

Extend the EU's Research Framework Programme for transport and the environment. The EU must also give its backing to investment in the best technologies. Taxes that deprive the transport industry of the resources necessary to invest in environment-friendly technologies are ecologically counter-productive.

Actively support the development and use of alternative fuels and propulsion technologies. The EU must step up its funding of research, development and market introduction in this area, in conjunction with the individual EU member states. An integra-

ted strategy for mobility, climate protection and sustainable energy supply is of central importance to the EU, both to protect the foundation of our natural existence and to ensure the future competitiveness of Europe as a mobility location.

The fact that the new Council Directive on the promotion of renewable energy sources also contains origin-related criteria, with the aim of safeguarding the sustainability of alternative fuels, is to be welcomed. It is important that the implementation of the Directive is transparent and cost-effective and that the provisions regarding the admixture of biofuels also take into account the technology of existing vehicle fleets.

Establish a fair competitive framework. Multiple burdens imposed on transport companies by ecological tax instruments should be scaled back or avoided. Due to the absence of harmonised energy taxation, public transport in Germany is at a considerable disadvantage when competing in Europe.

Integrate emissions trading for air transport into a global system. Given the post-Kyoto climate protection programme, a global solution for including air transport in emissions trading must be found. If not, the European airlines will be threatened by serious competitive distortions.

Lay down requirements for reducing emissions in maritime transport. The maritime sector is subject to global competition. Fair and promising solutions for

climate protection can only be agreed at international level. The same applies regardless of whether emissions trading or the less bureaucratic climate fund is chosen as the means of implementation.

Promote key technologies – strengthen location

In the mobility industry,
Germany is Europe's showpiece location.
Europe in turn is at the forefront worldwide
in this highly innovative, high-tech sector.

To underpin and strengthen Europe's position as a mobility location, and to meet the growing need for mobility, it is essential that key technologies are systematically supported and a carefully defined strategy drawn up so that innovative products and services can be developed and marketed more easily.

The mobility sector is one of the Europe's »lead markets«. To safeguard its number-one position, the EU must not only promote research and development, but also set European standards for new applications.

Call for action

»Intelligent Transport Systems« (ITS) Action Plan:

In the area of multi-modal information systems, the measures contained in the ITS Action Plan can bring the individual players together. However, there are well-founded doubts about the effectiveness of draft Directive KOM(2008)887 as a legal basis for the coordinated, Europe-wide introduction of ITS as it is overly bureaucratic and lacks transparency.

When it comes to implementing the Action Plan, the European Commission must confine itself to technical subjects and standards and must not make mobility more expensive. A factor that will contribute materially to the success of eSafety, of GALILEO and of all the other measures in the Action Plan is the customer cost-benefit assessment, which must be taken into account in the development and marketing of innovative products and services.

GALILEO: The development of the European satellite navigation system must be promoted at European level through

- > the development and marketing of new utilisation concepts (e.g. driverless systems, container slot planning and tracking etc.) which make full use of the new capabilities of Galileo;
- > assessment of demand and the willingness of end-customers to pay when it comes to developing terminal devices and value-added services;
- > the coordination of research activities and rapid implementation of pilot applications to ensure that suffi-

cient services are up and running when the system is launched.

Above all, the industry urgently needs transparency from the EU with regard to usage fees, the schedule through to system launch, and the funding concept for the operational phase of GALILEO.

ETCS/ERTMS: the faltering process of introducing this European signalling and control system for international rail traffic requires further European support. The following are necessary:

- > Adequate financial resources to qualify for co-financing by the EU;
- > Adequate funding guidelines that include vehicle-borne expenditure and give the member states leeway to support the introduction of ETCS;
- > Concentration of subsidies on the rapid installation of ETCS/ERTMS in the identified priority corridors so as to allow rail freight transport services on these arterial routes to benefit early on from the use of a single European signalling system;
- > Funding the installation of vehicle-borne ETCS devices over and above the mandatory migration plans of the member states and the EU.

RFID (Radio Frequency Identification): the market for efficiency-enhancing RFID solutions in the logistics sector and public transport is gaining momentum. Companies in the mobility sector will be actively influencing this development in order to strengthen their position in the international market. To promote its usage, joint

action needs to be taken in the areas of standardisation, legal framework conditions and technical development, giving due consideration to consumer interests and data privacy regulations.

The EU has a major part to play in the process by coordinating and supporting those activities. Not least, light-touch regulation is required when it comes to recommendations for implementing privacy preservation and data protection principles in RFID-supported applications (2009/387/EC) for areas without direct personal links to individuals, e.g. logistics.

eSafety: the European eSafety programme must be rigorously pursued. By promoting research, development and market introduction, the EU is making an important contribution towards increased safety in transport. Driver assistance systems in road transport are of particular importance, as are intermodal traffic information services.

The German Transport Forum

Our mission

Mobility is one of the most important factors for growth and prosperity in Germany and Europe. To protect and expand mobility, over 170 German and European companies and associations have joined forces in the German Transport Forum.

The German Transport Forum is the only multi-modal transport industry association in Europe. As a lobby for all modes of transport, we provide impetus in the political decision-making process. In our dealings with Berlin and Brussels, we advocate competition and an end to bureaucratic hurdles.

In constant dialogue with politicians, scientists, the media and the general public, the German Transport Forum is both a competent knowledge manager and a politically independent platform. We see ourselves as an »advocate for mobility« and we campaign energetically for an integrated transport system that is efficient, customer-focussed, affordable, economic in its use of resources, and environmentally friendly.

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. This includes:

- > Safeguarding Germany as a transport location through future-oriented infrastructure;

- > The creation of demand-driven infrastructure through public investment at a consistently high level and the involvement of private partners;
- > Intelligent networking of transport infrastructure and data flows;
- > The promotion of environmental sustainability, energy efficiency and safety as indispensable quality factors in the competition between transport systems.

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