



The
Federal Government



Freight Transport and Logistics Masterplan

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I. Introduction

1. Freight transport and logistics – the key to a sustainable transport policy

The future shape of freight transport will also decide what the transport system as a whole in Germany will look like. At the same time, it will also be crucial in deciding whether, in twenty years' time, we have a transport system that ensures mobility, prosperity and jobs while reflecting environmental concerns. And the future shape of freight transport will also decide whether transport contributes to a better quality of life or becomes a burden on humans

and the environment. That is why the Freight Transport and Logistics Masterplan is a document that sets the direction for transport policy as a whole. Because passenger and freight transport are closely interlinked. People and goods use largely the same infrastructure. If goods get stuck in a traffic jam, people get held up as well. Freight transport and logistics thus play a key role in our efforts to shape our overall transport system.



2. The importance of freight transport and logistics

a) Mobility as the basis of personal freedom and social inclusion

Freight transport and passenger transport serve different expectations that citizens have of their transport system. But it is not only passenger transport that is about people. The same applies to freight transport and logistics: be it as someone who dispatches or orders consignments, be it as an operator or an employee in the supply chain, be it as a consumer of the delivered products.



Freight transport can only be viewed as part of mobility as a whole. The transport and supply of goods is an essential basis of our quality of life and self-development, while forming a major prerequisite of social interaction. Mobility educates us by providing us with freedom of movement, a basic condition of our personal freedom. Without mobility, neither personal self-development nor direct communication with other people is possible. At the

same time, mobility facilitates social inclusion, because it is absolutely essential if people are to participate fully in working life, in education and culture, and in social life as a whole. Conversely, this also applies to the transport of goods. Freight transport and logistics move goods to where people need them. In doing so, they create the material conditions for people to develop and for social exchange, which manifests itself in the trade in goods and products. And there is another social element involved. Freight transport and logistics services are provided by people for people. That is why the present Masterplan addresses not only the transport system as such, but also the companies that operate in the freight transport and logistics sector and their employees, without whose work freight transport and logistics would not function in the first place.

b) Mobility as a driver of economic growth and job creation

Mobility – be it the mobility of people themselves or the transport of goods – is a major basis of prosperity and employment. Because these are based on production characterized by the division of labour and on the exchange of products and services. For a modern industrial and service economy based on the division of labour, transport – which, as commercial transport, comprises both freight transport and passenger transport services – is thus an indispensable prerequisite.

Freight transport and logistics are the linchpin of our economy, which is based on a division of labour. Companies engaged in trade and industry depend on reliable and

punctual transport operations. This becomes apparent in particular when the freight transport and supply chain fails to operate smoothly. The result is not infrequently a loss of production within a very short period of time, and people become aware of something that has been largely forgotten, given the fact that the transport and logistics system in Germany usually operates so well. Namely that almost every job in trade and industry depends directly or indirectly on a properly functioning logistics and transport system.

One of the main reasons why transport is of such tremendous importance is that the German economy is dependent on exports. The contribution made by exports to German gross domestic product rose sharply from 16 % to over 23 % between 1995 and 2006. This trend will continue in the future, with a forecast annual growth in exports of

around three percent. Exports are thus the crucial growth engine of the German economy. The import of intermediate products – likewise on the rise – also makes a contribution to this. Germany is a high-technology location. As such, it is becoming increasingly dependent, within the framework of a global division of labour, on imported inputs, whose processing and final assembly in Germany creates jobs and safeguards the competitiveness of German companies.

However, this dynamism would not be possible without a properly functioning freight transport and logistics system. This transport system represents a significant locational advantage in global competition. It makes Germany a more attractive place for foreign investors and helps to create new jobs in trade and industry. This means that freight transport and logistics are a major prerequi-



site for ensuring the competitiveness of the German economy on a long-term basis.

As a result of this economic importance, the logistics sector itself has grown steadily in recent years:

- The logistics sector, which today directly employs over 2.6 million people, is one of the largest and most dynamically developing labour markets in Germany.
- With an estimated turnover of around 836 billion euros (EU 27 plus Norway and Switzerland, 2006 figures), the logistics industry occupies third position in the league table of major European economic sectors, only just behind the construction and food industries and way ahead of the metalworking and automotive industries.
- With a turnover of 189 billion euros and a 21 % share, Germany is by far the most important European logistics market.¹

Freight transport and logistics thus form an important – and often underestimated – basis of our prosperity. They are drivers of economic growth and employment.

The political parties that make up the Federal Government have recognized this importance. In the coalition agreement of 11 November 2005, they agreed to continue to consolidate “Germany’s leading position as a logistics hub”, to promote “an internationally competitive framework for Germany as a logistics hub” and “in particular, to make the

transport system as a whole more efficient for freight transport and to optimize utilization of the transport infrastructure.”

On this basis, the Federal Minister of Transport, Building and Urban Affairs seized the initiative for the development of a Freight Transport and Logistics Masterplan covering a wide cross-section of society. The fact that this initiative has attracted great participation from industry, academia and non-governmental organizations illustrates that the shaping of our freight transport and logistics system is a key issue of sustainable societal modernization, and that people believe there is a great need for action in this sphere.

Thanks to its technology-oriented measures, in particular, the Freight Transport and Logistics Masterplan makes a contribution to the innovation policy objectives of the Federal Government’s high-tech strategy in the “vehicle and transport technology” field of innovation.

¹ Data from Fraunhofer Institute for Integrated Circuits – Working Group for Technologies in the Logistics Services Industry (2005): Logistikstandort Deutschland; Fraunhofer Institute for Integrated Circuits – Working Group for Technologies in Logistics Services (2007): TOP 100 in European Transport and Logistics Services.

3. Freight transport and logistics at the centre of social change – new challenges for transport policy

Germany has one of the most modern transport infrastructures in the world, with a dense and efficient network of roads, railways, waterways, ports and airports. The logistics systems have been developed to a very high standard. The Federal Government’s objective is to lastingly secure the leading position that Germany enjoys in freight transport and logistics and in transport infrastructure. To achieve this goal, both the public and private sectors have to address the economic, social and ecological challenges.

responding with this Masterplan is the drastic rise in the level of freight traffic that is likely as a result of globalization and increasing division of labour in the economy. Increasing specialization and division of labour will lead to a further rise in international trade. The result will be that more and more goods are transported over increasingly long distances. This means that there is likely to be a sharp increase in the demand for logistics and freight transport services.

If we do not react to this, the result will be that tonne-kilometres in Germany are likely to rise by 71 % between 2004 and 2025. In the road haulage sector, this rise will be higher (79%) and in **long-distance** road haulage it will be as high as 84%.² Moreover, since this rise will differ from one region to the next, it is likely that freight traffic levels will almost double on some trunk roads. If this forecast rise were to become reality, it would mean: where today one lane of a motorway is used by heavy goods vehicles, in just under twenty years two lanes would be necessary to cope with the increased volume of freight traffic. In addition, passenger traffic will also increase, although at a much lower rate (19%).



a) Traffic growth as a result of globalization and an increasing division of labour

The first and, at the same time, key challenge to which the Federal Government is

It is obvious that such growth presents transport policymakers with great challenges. They have to ensure that economic growth and jobs, on which we depend to secure our prosperity, are not constricted by bottlenecks in the transport system. Inadequate transport

² Intraplan Consult GmbH and BVU Beratergruppe Verkehr + Umwelt GmbH (2007): Prognose der deutschlandweiten Verkehrsverflechtungen 2025, R&D No 96.0857/2005, commissioned by the Federal Ministry of Transport, Building and Urban Affairs.

infrastructure would have an adverse impact not only on the German economy but on our mobility as a whole. Because congestion affects goods and people alike. This means that increasing levels of freight traffic will aggravate the conflicts with passenger traffic. Thus, it is not just a question of ensuring the proper functioning of our freight transport system as a basis of competitiveness and economic growth. The challenge also involves organizing freight transport in such a way that it has as little adverse impact as possible on people's mobility – more specifically on passenger transport.

b) Climate change and environmental protection

More traffic, if it is not organized more efficiently, also means more emissions of pollutants and CO₂, more noise and more land take. In addition, the energy consumed by transport causes problems, because 71% of all transport in the European Union is dependent on petroleum, and in the road transport sector this figure rises to 97%. Moreover, transport is responsible for around 20% of all CO₂ emissions in the EU. Road haulage accounts for around one third of all CO₂ emissions from road transport. As CO₂ emissions from private transport continue to decline and the volume of road haulage increases as predicted, this ratio will increasingly deteriorate to the disadvantage of road haulage. And there is another factor here. Given the fact that the cost and energy efficiency of large diesel engines is already high today, the technological scope for conceivable further savings in heavy goods vehicle engines is limited – unlike passenger car engines – and, moreover, these savings will not be possible in the short term.



This brings us to the second major challenge addressed by this Masterplan. We have to make transport environmentally acceptable and climate-friendly and shape it in such a way that it has as little adverse impact as possible on our quality of life. This means that transport has to consume less energy and become more efficient, cleaner and, not least, quieter. This is also in the freight transport sector's own interests, and they realize this. Because noise, environmental pressures and health hazards caused by freight traffic will, in the long run, mean that the population is less willing to accept freight transport.

c) Demographic change

According to forecasts by the Federal Statistical office, the population of Germany will

decline from its present figure of 82.5 million to around 74 million by 2050.³

However, because of the aforementioned impacts of greater specialization and division of labour, this decline will not, in the medium term, result in a drop in freight traffic levels. However, demographic change does present transport policymakers with significant challenges in that the population trends will differ widely from one region to the next and, as a result, there will be regional differences in the way in which the growth of freight traffic flows evolves. Whereas in some regions there is likely to be only a moderate rise in the level of freight traffic, there will be much more pronounced growth in the volume of freight traffic on the main transport arteries leading to and from seaports and between the major conurbations. These regionally differentiated trends mean that the freight transport industry will have to make major adjustments. But it is up to transport policymakers, more than anyone else, to establish infrastructure investment priorities that reflect the different requirements. Investment in the foreseeable pinch points in the transport system on the main arteries will thus be of key importance. This will also benefit the population in less favoured areas, because regions with a declining population and lower traffic growth are also dependent on the supply of goods via the busy main supply arteries being secure.

Demographic change impacts on the freight transport and logistics system in another respect. It entails changed logistics and mobility requirements of an ageing population and, as a result, presents the transport

and logistics industry with an opportunity to develop new logistics products and tap into new markets. The rising proportion of elderly consumers calls for a rethink not only in product development and marketing, but also in logistics services. This could result in a widening of the range of logistics services, for instance by the establishment of special delivery and transport services. Thus, the rising average age of the population will also not result in less traffic. Rather, there is likely to be a rise in the number of delivery, home and health care services. This is yet another reason why, despite a declining population, there will be a further increase in passenger and tonne kilometres.

d) Changed conditions of work and skills requirements

It is true that operators in the freight transport and logistics sector benefit from the rising demand for freight transport that increasing globalization and spatial and functional division of labour involve. But they



³ Federal Statistical Office (2006): 11th coordinated population projection.

also face increasing challenges in that they are confronted with a growing demand for labour while the workforce itself is shrinking. Today, already, many fields of the freight transport and logistics sector are experiencing difficulty in recruiting skilled personnel. An ageing and declining population will make it even more difficult to meet the demand for skilled labour in the decades ahead. Thus, the logistics sector, like German industry as a whole, faces the challenge of preventing a slowdown in growth caused by lower manpower resources resulting from demographic change.

At the same time, advancing specialization, technological innovations and increasing international competition are radically changing the conditions of work and the skills requirements for people employed in the freight transport and logistics sector, 44% of whom were without vocational training as recently as 2004.⁴ Rising skills requirements could mean that the shortage of skilled labour becomes a problem for logistics operators in the medium term. The workforce is becoming a key factor for the successful development of the logistics and transport industry. In the future, therefore, its competitiveness will depend primarily on whether operators succeed in training their employees to give them the skills they require and – given that their work will become more demanding – in motivating them. Here, in-company basic and further training will play a key role.

At the same time, increasing global competition will intensify the competitive environment in which the freight transport

industry and its workforce operate. Logistics takes place worldwide and around the clock. Operators and their workforce will face increasing pressure to meet tight delivery deadlines. In addition to staff training, therefore, the creation of good working conditions is a key task that operators have to address. It is the responsibility of the government to enact effective social legislation and monitor compliance with it.

e) **More exacting safety and security requirements**

Rising levels of freight traffic, the increasing workload of people employed in the freight transport industry, plus the higher average age of road users resulting from demographic change and the threat of natural disasters mean that transport policymakers are having to focus more on questions of transport safety. In addition, there is a need for transport security to protect the supply chains against the threat posed by terrorists.

Globalization and the associated interdependence between national economies have made freight transport and logistics more vulnerable. The Federal Government considers it to be a joint task to enhance the security of the supply chains and thus also of the people employed in the freight transport industry. What is needed is continuous international agreement on how to ensure security for transport and trade flows. Lasting safety and security in cross-border transport is only possible through international cooperation. The challenge consists of organizing the measures

⁴ Fraunhofer Institute for Integrated Circuits – Working Group for Technologies in the Logistics Services Industry (2006): Stand und Entwicklung der Logistik in Deutschland, commissioned by the Federal Ministry of Transport, Building and Urban Affairs.

required for enhancing safety and security in such a way that they have as little adverse impact as possible on the ability of the transport system to operate efficiently and speedily and

that the financial and administrative burdens on operators and the public authorities are minimized, while ensuring that the population is supplied in an optimum manner.

4. Sustainability as a benchmark of transport policy

In a changing environment, preserving mobility means reshaping transport. This is the responsibility of government, industry and civil society.

In this context, the Federal Government is guided by the principle of sustainability. This

means, first and foremost, that transport policy is there to serve people, and that includes future generations. Transport policy must be fashioned in such a way that mobility remains possible, as the basis of individual development and social exchange, and that the foundations of our prosperity are preserved. To put



it another way, the mobility we enjoy today and the way in which we shape our transport system and its infrastructure must not be at the expense of the mobility and quality of life of our children and grandchildren.

The Federal Government's transport policy is thus based on the three benchmarks of sustainable action:

1. The economic benchmark – transport is to make a lasting contribution to prosperity, employment and the competitiveness of the German economy, without impacting excessively on other land uses. Competition, as a driver of quality and efficiency, is of great importance here.
2. The ecological benchmark – transport is to be shaped in such a way that natural

5. Transport policy in social dialogue

Sustainability, as the combination of economic, ecological and social requirements, cannot be achieved unless all stakeholders are involved. Thus, from the outset, the process of developing the Masterplan aimed to link up players from industry, academia, government and civil society on a broad basis and to overcome structures of thinking and working that are “set in stone”. To launch such a joint process of development and learning, the Federal Ministry of Transport, Building and Urban Affairs staged a number of thematic workshops with experts from industry, academia, authorities of the federal states and associations (including unions, trade associations and environmentalist groups).

resources and thus also the quality of life of the present and future generations are preserved.

3. The social benchmark – transport is to enable everyone to participate in public life. Transport policy thus has a social responsibility – for affordable mobility, for safety and fairness in transport and for good working conditions for people employed in the freight transport industry.

The Federal Government has thus adopted an integral approach in this Masterplan. The aims of the measures contained in the Masterplan are economic efficiency, environmental friendliness and social responsibility.

A total of over 700 participants contributed their expertise and experience. The results of this dialogue process have been drawn together in a list with proposed measures. This Masterplan is the outcome of a process in which the federal states, associations and Federal Government departments were involved. This was followed by a process of assessment by the Federal Ministry of Transport, Building and Urban Affairs, during which the other government departments had an opportunity to provide comments.

In September 2007, the Federal Minister of Transport, Building and Urban Affairs set out his benchmark for assessing the proposals



for action resulting from the dialogue process in the “Transport Policy Guidance for a Freight Transport and Logistics Masterplan”. In line with this guidance, and as a result of the consultations between the government departments, with the federal states and stakeholders from industry, academia and associations, the present Masterplan of the Federal Government has been developed for the future direction of freight transport in Germany. Given the large number of envisaged targets and proposed measures, not all of which were convergent, the aim of the Masterplan was to carry out an initial priori-

tization, which will be continuously reviewed and updated in accordance with the criteria of sustainability (including the financial criteria).

Responsibility for implementing the measures enumerated in this Masterplan lies with the different players. Thus, for each measure, the Masterplan states who is responsible for its implementation. And the same applies to implementation as applied to the process of developing the Masterplan. It will not be a success unless all sides continue to be willing to engage in a dialogue and to cooperate.

As the European Union grows more closely together, transport policy has to be conceived and planned in European terms. There was an intensive exchange of views between the Federal Ministry of Transport, Building and Urban Affairs and the European Commission. That is the reason why the Freight Transport and Logistics Masterplan and the EU's Action

6. Objectives of the Masterplan

A Making optimum use of transport infrastructure – shaping transport to make it more efficient

In view of the considerable growth in traffic and the tight constraints on public funding, the Federal Government's foremost objective is to enhance efficiency and to make

Plan for Freight Transport Logistics, which was presented in the autumn of 2007, are seamlessly linked and complement each other. It is now imperative that we continue this dialogue with the greater involvement of our European neighbours, some of whom have likewise started to develop masterplans.

optimum use of the existing capacity inherent in our transport system. It will not be possible to cope with the expected additional traffic volume by simply constructing new and upgrading existing transport infrastructure. For financial and economic reasons, for reasons of nature conservation and landscape protection, to ensure that land is available for agricu-



lural production and to prevent any further deterioration in the quality of life of people living along transport routes, it is imperative that optimum use be made of the existing infrastructure in order to limit upgrading and new construction to that which is absolutely essential and to focus such work primarily on removing bottlenecks in the transport system.

The Federal Government's aim is thus to better interlink the individual modes of transport as part of an integrated transport system in order to make optimum use of the strengths inherent in each mode and enhance the capacity of the system as a whole. Within the framework of such an integrated transport strategy, the Federal Government attaches great importance to seaports, inland ports and airports as key points of interchange between the different modes of transport. The Federal Ministry of Transport, Building and Urban Affairs will therefore present a National Airports Strategy and a National Ports Strategy in order to enhance the competitiveness of German ports and airports and improve the links between these transport hubs and the inter-urban transport network. In the future, it will be important not only to make greater use of the environmentally friendly inland waterways but also to make greater use of the potential inherent in maritime shipping over medium distances (short sea shipping). By doing so, it will be possible to reduce the level of freight carried by road and rail and free up additional capacity in those modes.

In addition, the Federal Government will significantly expand the use of electronic traffic control and management systems in all modes in order to achieve better control of

traffic flows, which in turn will spread the load on transport infrastructure more evenly and enhance the capacity of the infrastructure. In the federal trunk roads sector, the aim is to significantly reduce congestion by installing further active and strategic traffic management systems, by allowing moving traffic to use the hard shoulder at certain times and by introducing a roadworks management system that minimizes congestion. On the railways and waterways, latent capacity is to be systematically unlocked by using modern telematics technologies. At the same time, all these measures will help to enhance transport safety.

If an integrated, high-capacity transport system is to be preserved on a permanent basis, it is absolutely essential that the long-term functionality of transport infrastructure be ensured in the face of the foreseeable impacts of climate change. The Federal Ministry of Transport, Building and Urban Affairs will therefore review the potential inherent in inland waterways in a research programme, against the background of climate change, and develop adaptation strategies in order to ensure the long-term future of inland navigation in Germany as an environmentally friendly mode of transport.

B Avoiding unnecessary journeys – ensuring mobility

In addition to making better use of existing transport infrastructure, another overriding objective of the Federal Government is to avoid unnecessary freight mileage wherever this is possible without having an adverse impact on the economy. Without proactive

transport policy measures, the rising levels of freight traffic would not only have a significant impact on the environment and people's quality of life. They would also entail the risk of our mobility coming to a standstill in total gridlock on certain transport arteries. This has to be prevented.

With regard to freight transport, the Federal Government thus believes that maximum efficiency in traffic management, optimized control of logistics processes and the removal of bottlenecks in the transport system are absolutely essential to ensure that avoidable journeys do not actually take place. Avoiding



unnecessary journeys by means of greater efficiency will cut operators' costs and thus also benefit the industry. Logistics strategies have to be evolved so that freight transport operations can be consolidated wherever possible (e.g. in city logistics) and incentives have to be created for an ever greater reduction in the

number of empty journeys. It is up to operators to step up their investment in innovative technologies and make their contribution to avoiding unnecessary journeys.

In addition, the Federal Government will vigorously lobby at European level to ensure that transit traffic in and through Europe moves efficiently and sustainably. Germany recognizes its European responsibility as a transport hub and transit country. That is why it is necessary, in Europe, to find ways of strengthening the Lisbon process and minimizing the impact of transit traffic on the environment and quality of life.

C Shifting more traffic to the railways and inland waterways

The Federal Government is pursuing the objective of shifting much more traffic to the railways and waterways. For this reason, it will establish a regulatory framework and investment priorities that will enable the rail mode to increase and sustain its share of freight traffic by 2025. The measures designed to strengthen rail freight may at the same time help to enhance the capacity of the railways in the passenger sector.

Strengthening the railways and waterways is a major contribution towards making our transport system more climate-friendly and more environmentally friendly. In addition, shifting traffic to the railways and waterways will also help to free up capacity on the roads and tackle congestion. Thus, road transport will also benefit from a strengthening of the railways and waterways. It is thus in no way a question of playing the individual modes off against each other. Rather, the Fede-



ral Government's aim is that, within an integrated transport system, the individual modes should be used and interlinked in such a way that they can deploy their inherent strengths in an optimum manner.

The Federal Government supports measures that will result in more competition in rail transport. European integration, with the opening-up of the market for international rail freight, is thus viewed positively. The Federal Government supports the continuation of European liberalization efforts. The fact that there is still a lack of harmonization must not be used as an excuse by individual countries to back-pedal on liberalization or suspend it. Enhancing competition in rail transport will improve its competitiveness vis-à-vis the other modes of transport. A start should be made by evolving the regulatory framework. The Federal Government will also lobby at European level for fair conditions of competition between the modes of transport.

D Upgrading more transport arteries and hubs

Avoiding unnecessary journeys, efficient traffic management and a modal shift will not, by themselves, be sufficient to secure our mobility in the long term. There are already noticeable bottlenecks in our transport infrastructure, and the volume of traffic is forecast to rise significantly. Against this background, the Federal Government will step up its efforts to upgrade the transport infrastructure on a human scale and in an environmentally sound manner. In doing so, it will take account of noise mitigation as well as the other aspects of environmental protection and nature conservation, plus the interests of agriculture and forestry. Plans are to be geared to an even greater extent to the needs of the people in the local communities.

In order to take account of the future upgrading requirements as well as the rising

expenditure necessary for the maintenance of existing networks resulting from the increasing wear and tear on the transport infrastructure, which today already consumes almost two thirds of total investment in transport infrastructure⁵, the Federal Government has increased the federal funding available for investment in transport infrastructure. It calls on the federal states and local authorities to likewise significantly increase transport investment in their areas of responsibility. Despite rising expenditure on maintenance, the financial scope for a targeted upgrading of the transport infrastructure is to be ensured in the future, giving due consideration to budgetary requirements.

Despite rising levels of investment, it is still necessary to define priorities in upgrading infrastructure. Here, it is necessary to take account of the considerable differences in traffic trends. For this reason, the Federal Government will give priority to upgrading those transport arteries and hubs where there are already capacity constraints today or where such constraints are likely in the medium term because traffic volumes are rising at a disproportionately high rate, and those arteries and hubs where an appropriate adaptation of the transport system would make it possible to better exploit existing spare capacity. This applies, for instance, to the some of the routes to and from ports and some north-south rou-



⁵ Cf. Federal Ministry of Transport, Building and Urban Affairs (2007): Investitionsrahmenplan bis 2010 für die Verkehrsinfrastruktur des Bundes.

tes, which have almost reached their capacity limits today and will have to cope with a disproportionately high growth in traffic levels in the future. Upgrading these bottlenecks in our transport system will also benefit the provision of links to rural areas – including those a long way away from the actual construction works. Because the creation of adequate capacity for freight and passenger traffic on the busiest main transport arteries is absolutely essential if people and goods are to be able, in the future, to reach every corner of our country quickly and punctually. At the same time, prioritization also has to consider the objectives of structural policy, which aim to ensure balanced development throughout Germany.

Against the background of the rising levels of freight traffic, but also the widely differing levels of traffic on individual routes, the Federal Government will consider whether, and if so how, the requirement plans and capital budgeting for the roads, railways and waterways have to be adapted to the changed traffic trends and economic developments.

In order to enhance the efficiency of the main transport arteries, the Federal Government is seeking a greater separation (“segregation”) of slower freight traffic and faster passenger traffic, for instance by means of lane management based on traffic volumes on motorways and a greater separation, in terms of space and time, of freight and passenger services on the railways. Here, too, this will not be possible unless the busiest routes are upgraded in a targeted manner. In the case of the motorways, this means systematically widening them to six lanes. In the case of the railways, it means the speedy delivery of those projects identified in the 2003 Federal Trans-

port Infrastructure Plan as being essential for an effective segregation of long-distance passenger services and freight services.

E Environmentally friendly and climate-friendly transport

Tomorrow’s transport is to be quiet, clean, efficient and climate-friendly. As part of the efforts to combat climate change, there has to be a further reduction in the specific CO₂ emissions from transport. The objective of reducing greenhouse gas emissions by 40 % by 2020 compared with 1990 levels, which was reaffirmed in the Integrated Energy and Climate Change Programme, means that the transport sector will also have to make a substantial contribution. In this programme, the Federal Government has already reached agreement on a number of measures affecting the transport sector. They include the introduction of mandatory CO₂ limits for passenger cars at EU level, increasing the share of biofuels – preferably second-generation biofuels – in fuel consumption to 20 % by 2020, the climate passport for passenger cars, the introduction of a carbon- and pollutant-based motor vehicle tax for newly registered passenger cars and the inclusion of aviation and shipping in emissions trading. However, given the forecast growth in traffic levels, it is obvious that reducing specific energy consumption and CO₂ emissions by technological means alone will not be sufficient. The measures set out in this Masterplan to optimize the transport system, to shift traffic to the railways and waterways, to make freight transport operations more efficient, to optimize use of existing transport infrastructure, and the other measures to relieve congestion on the roads, especially extending the range of public transport services, thus also serve the

purpose of further reducing energy consumption and CO₂ emissions in the transport sector. In addition, action is also to be taken to minimize the use of agricultural and woodland areas and nature conservation and landscape protection sites, including the land needed in compensation.

One of the Federal Government's major objectives is to reduce the noise associated with freight transport. The Federal Ministry of Transport, Building and Urban Affairs has



launched a National Traffic Noise Mitigation Package, which addresses noise mitigation measures in all modes of transport. In particular, the desire to attract more traffic to the railways is linked to the objective of significantly reducing the noise caused by rail freight. In addition to structural measures such as noise barriers, the Federal Government has launched a pilot project to promote the retrofitting of freight wagons with composite brake blocks, which will result in a lasting reduction of the noise caused by freight trains. It is also seeking a differentiation of track access

charges based on noise emissions, in order to create an economic incentive to speed up the retrofitting of the freight wagon fleet. At European level, it will lobby vigorously for concrete agreements on improved noise mitigation measures in the wagon fleet.

However, protection against traffic noise is not solely a responsibility of the state. The Federal Government therefore believes that operators themselves are responsible for perceptibly reducing freight traffic noise by purchasing low-noise vehicles in the road haulage sector and by retrofitting the wagon fleet in the rail freight sector. This is in the operators' own interests, and they realize this, because the noise caused by freight traffic and the associated impairment of people's quality of life will, in the long run, mean that the population is less willing to accept freight transport, thereby jeopardizing the economic foundation of operators.

F Good working conditions and good training in the freight transport industry

The Federal Government is firmly committed to improving basic and further training and ensuring good working conditions in the freight transport and logistics sector. To this end, it will launch continuous collaboration between all the major stakeholders – not only government bodies but also, and in particular, operators, the appropriate trade associations and the unions.

The people employed in the freight transport and logistics sector are especially affected by the changes in the transport sector described at the beginning of this document. At the

same time, they represent the key factor in ensuring that the German logistics and transport industry enjoys a development that is successful in the long term. Investment in the training of their workforce is thus just as important for the competitiveness of operators as investment in technology and their vehicle fleet. It is already becoming apparent that there will be a shortage of skilled labour. To counter this, the basic and further training systems have to be strengthened and evolved to meet the more exacting requirements.

The Federal Government, together with operators, trade associations, chambers of industry and commerce, and unions, will thus launch a basic and further training drive before the end of 2008 and incorporate it into the skills initiative for Germany. Regular industry summits, to which the Federal Government will invite the aforementioned players, will be held to achieve continuous collaboration to improve the basic and further training situation on the logistics market. The Federal Government also believes that operators should create additional apprenticeships, as they pledged to do in the National Pact for Training and Young Skilled Workers in Germany of 5 March 2007, and improve job skills in order to lay the foundations on which they will be able to meet their rising demand for skilled labour in the future.

Logistics courses in higher education, despite being of outstanding quality, have so far tended to receive little attention. In order to improve the profile of this subject, the Federal Government will lobby for the creation of an internationally recognized course of study that provides basic and further training in the field of logistics and that is closely linked with



internationally operating companies in the sector and the leading research institutions.

In addition, the Federal Government will task the Federal Office for Goods Transport with evaluating the working conditions in the freight transport and logistics sector annually as part of its observation of the freight transport market. In order to ensure good working conditions in view of the increasing pressure to meet tight delivery deadlines that those employed in the sector are facing, it is absolutely essential that operators comply with social legislation and provisions governing health and safety at work, road safety and the carriage of dangerous goods. Unless there is significant progress here, the Federal Government, in cooperation with the federal states, will step up checks to prevent social dumping and non-compliance with legislation. It is in the interests of every operator to comply with the appropriate rules and regulations. Because satisfied, motivated and healthy workers form the basis of all long-term economic success.

7. Implementation

In order to make Germany even more attractive as a centre for logistics, all stakeholders can, and must, make a contribution, each in their own area of responsibility. The Federal Government, federal states and local authorities are responsible for creating the regulatory framework and preparing the infrastructure for the tremendous growth that lies ahead.

The Masterplan describes the framework of freight transport policies that the Federal Government believes should have priority. Substantial funding is available in the financial planning to 2012 for those measures that are in the area of responsibility of the Federal Government. Thus, for 2009, around 10.2 billion euros has been earmarked for investment in the classic road, waterway and rail modes plus combined transport. That is around 1 billion euros more than in the current financial plan. Transport investment will be sustained at a high level in the period from 2010 to 2012. This increase in transport investment will be made possible by increasing, and making more ecological, the tolls that are imposed on heavy goods vehicles for the use of federal motorways, based on the “user pays” principle. All the additional toll revenue will be invested in the transport sector. In addition, proceeds from the privatization of the railways will increase the level of investment that is available for transport infrastructure. And – provided that it offers value for money – there is to be a greater involvement of private sector capital in the provision of transport infrastructure by means of PPP projects.

But action is also required on the part of the operators, as the actual agents of economic

activity, the trade associations and unions plus civil society groups as representatives of the various societal interests. One of the objectives of this Masterplan is to arrive at lasting collaboration between all the stakeholders, to coordinate interests and represent them at European level, thereby jointly ensuring that Germany remains the number one location for freight transport and logistics in Europe.

The Federal Ministry of Transport, Building and Urban Affairs will conduct an initial evaluation of the measures and their impacts.

It is important that all stakeholders interact in implementing the measures – depending on their responsibility and acknowledging the fact that the only way to effectively address all the challenges is by collaborating, and that this is the only way to meet the economic, ecological and social requirements in transport policy.

It is now imperative that we continue the social dialogue on transport policy, which has been intensified by the Masterplan process, and that we make further use of the valuable pool of expertise, experience, contacts and creativity. The network of players from industry, academia, government and civil society, which emerged during the process of developing the Masterplan, forms an excellent basis for this.

II. Measures

A Making optimum use of transport infrastructure – shaping transport to make it more efficient



A 1 Develop and deploy more traffic management systems on busy sections of federal motorway

Current situation

In many areas, traffic management systems can help to improve traffic conditions. By means of active control measures, they make it possible for road users to adapt their behaviour to the traffic situation at any given time. Dynamic displays such as maximum speeds, bans on overtaking or lane control signals make traffic flow more smoothly, thereby avoiding driver behaviour that could result in congestion or accidents. This modern telematics equipment has not yet been installed on many busy sections of the German motorway network.

Description of the measure

Busy sections of motorway on which telematics equipment has not yet been installed are to be equipped with such systems at a faster rate than in the past. Systems already installed are to be optimized and, if necessary, upgraded to reflect the state of the art.

Impact

This measure will enhance the capacity of the corresponding sections. It will enhance the efficiency of the entire motorway network and help to avoid congestion and improve road safety. This is likely to result in additional positive effects with regard to climate change mitigation and environmental protection, for instance by reducing CO₂ emissions.

Responsibility

Federal Ministry of Transport, Building and Urban Affairs in cooperation with the federal states affected.

Budgetary relevance

This measure will be funded from the Federal Ministry of Transport, Building and Urban Affairs' budget.

EU relevance

This measure is consistent with EU transport policy.

Implementation period

This measure is due to be launched in 2008. The aim is to have the equipment installed on all busy sections by 2015.

A 2 Standardize and link up the traffic management systems on federal motorways nationwide

Current situation

On the German motorway network, the capture and analysis of traffic data and the control of traffic using traffic management systems is performed by the infrastructure operators at federal state level. At present, there is no nationwide link-up of these traffic management systems. Nor is there any coordination or cooperation between the operators on the scale required. This means that it is not possible to exploit the potential for making more efficient use of the federal motorway network.

Description of the measure

Taking account of existing traffic management systems, the authorities of the federal states, in cooperation with the Federal Ministry of Transport, Building and Urban Affairs and the industry, are to develop a strategy for linking up existing traffic management systems. The aim of the strategy is to facilitate responsive and efficient traffic management on federal motorways. This will involve, for instance, predictive information on congestion, available parking spaces plus measures that impact on the flow of traffic, such as speed limits or bans on overtaking.

Impact

By providing intelligent traffic information and control, this measure will make it possible to enhance capacity on federal motorways throughout the country. By means of better route planning and the ability to react at short notice to evolving traffic situations, it will be possible to manage transport movements more reliably. This will also have a positive impact on the environmental acceptability of transport and reduce its climate change impact. The measure will also improve road safety.

Responsibility

The federal states, in cooperation with the Federal Ministry of Transport, Building and Urban Affairs, are responsible for developing and implementing the strategy.

Budgetary relevance

This measure will be funded from the Federal Ministry of Transport, Building and Urban Affairs' budget.

EU relevance

This measure is consistent with EU transport policy.

Implementation period

This measure is due to be launched in 2008. The strategy is due to be finalized by the end of 2009 and implemented in its entirety by 2015.

A3 Speed up implementation of the “Development programme to increase the number of parking areas at service stations and rest areas on federal motorways”

Current situation

There are insufficient parking areas for heavy goods vehicles on and in the vicinity of the federal motorways. This may increasingly result in HGVs being improperly parked, additional traffic searching for parking spaces and even in the permissible driving periods being exceeded, which would lead to a greater risk of accidents. The forecast rise in the level of freight traffic, combined with the new rules governing driving hours and rest periods, will result in even greater demand. The greatest demand is at the border-crossing points on the routes to Eastern Europe. The Federal Minister of Transport, Building and Urban Affairs has recognized this urgent need. In the autumn of 2007, he set up an “HGV Parking Facilities on Motorways” Project Group to address the issue of enhancing capacity.

Description of the measure

An additional 11,000 parking spaces are to be created. The activities of the Federal Ministry of Transport, Building and Urban Affairs Working Group to identify requirements and construct additional HGV parking areas cover the entire federal motorway network. Because of the pressing problems at the border-crossing points on the routes to Eastern Europe, the identification of requirements and construction for these areas are to be brought forward. Account will be taken of the guidelines governing service stations and rest areas of the federal states.

Impact

This measure will help to make optimum use of the transport infrastructure, to avoid unnecessary journeys, to make transport more environmentally friendly and reduce its cli-

mate change impact, and to improve working conditions.

Responsibility

Federal Ministry of Transport, Building and Urban Affairs, highway authorities of the federal states (delegation of administrative powers), local authorities. Plus freight forwarders associations, Autobahn Tank & Rast Holding GmbH, Association of German Truck Stops (VEDA).

Budgetary relevance

This measure will be funded from the Federal Ministry of Transport, Building and Urban Affairs’ budget. A total of € 250 million will be available for the development programme over the period to 2015. Of this sum, € 35 million is to be invested in 2008.

EU relevance

The European Commission (DG TREN) has launched a pilot project aimed at creating a network of secure HGV parking areas in the EU. The project has initial funding of € 11 million to 2009 and is currently occupied with definition tasks.

Implementation period

Creation of 11,000 additional parking spaces by 2012.

A4 Continue and intensify the measures to tackle congestion by optimizing roadworks management

Current situation

Congestion causes economic damage and harms the climate and the environment through an unproductive increase in emissions. Experts have estimated that congestion on our motorways costs the economy at least ten billion euros and is responsible for billions of litres of fuel being consumed unnecessarily. The growth in traffic levels predicted by current forecasts could seriously exacerbate this situation.

In many cases, roadworks on motorways impede the flow of traffic, increase the risk of congestion and reduce road safety. Today, an average of 200 to 280 roadworks sites are in place every day for the maintenance and operation of the federal motorways. Experts assume that these roadworks are responsible for more than one third of all congestion on motorways.

Description of the measure

Roadworks management is to be optimized to avoid congestion. This involves:

- reducing the time for which a roadworks site is in place by wording tender documents and contracts appropriately and by performing work outside normal working hours, if necessary on Sundays or at night;
- avoiding cumulative congestion by means of better nationwide coordination of roadworks;
- facilitating a smoother flow of traffic at the roadworks site by better adapting the measures taken (e.g. number and width of lanes) to the traffic situation and making greater use of dynamic traffic control measures (e.g. display of speed limits and bans on overtaking).

Impact

This measure is designed to result in a smoother flow of traffic at roadworks sites. This will reduce congestion and minimize the economic damage it causes.

Responsibility

The Federal Ministry of Transport, Building and Urban Affairs, in cooperation with the federal states, is responsible for implementing the measures.

Budgetary relevance

Implementing the measures will result in additional costs for roadworks. However, these additional costs will be more than offset by substantial economic gains. The funds required will be included in the budget estimates of the Federal Ministry of Transport, Building and Urban Affairs.

EU relevance

The measures are consistent with the objectives of EU transport policy, especially regarding an increase in road safety, an improvement of the flow of traffic in Europe and a reduction in emissions from transport.

Implementation period

The measures are to be launched in 2008.

A5 Provide traffic information and communications services for heavy goods vehicles on the motorway network by using toll information (value-added services)**Current situation**

To enhance its efficiency, the road haulage sector needs dedicated traffic information. Against this background, the demand for data generated by the German tolling system is rising.

Description of the measure

The current technical equipment of the system makes the German HGV tolling system an ideal platform for telematics value-added services, which should be developed. By using the existing platform, telematics service providers could use basic functions of the system – such as satellite-based positioning, the existing mobile communications channel or short-range communications using microwave technology – for their own services upon payment of an appropriate user charge. Regulatory, technological and organizational frameworks are to be created that allow fair competition between the telematics service providers.

Impact

This measure will make it possible to organize transport in a more intelligent, environmentally friendly and climate-friendly manner and to improve logistics strategies. It will be possible to reduce traffic searching for a parking space and prevent congestion. This will reduce CO₂ emissions and protect the environment. The services can help to avoid unnecessary journeys and improve working conditions.

Responsibility

The Federal Government is responsible for creating the regulatory framework. The establishment of a telematics gateway company is the responsibility of private sector companies, which will be responsible for the technological and organizational implementation.

Budgetary relevance

Minor, because the value-added services will be services performed in return for payment.

EU relevance

A decision by the European Commission regulates the conditions and obligations regarding the provision of telematics services based on the German tolling system by their operators.

Implementation period

The Federal Government will lay the contractual foundations by 2009. Initial applications could be launched around 2010/2011.

A6 Develop a strategy to speed up introduction of the European Train Control System (ETCS) on freight corridors in Germany**Current situation**

There are increasing capacity constraints on the main rail freight corridors. The forecast growth in volume, especially in traffic to and from seaports, will aggravate this situation. In addition, the multiplicity of incompatible train protection systems in the EU is a major obstacle to a European railway area with international trains that do not require a change of locomotive at borders. Since Germany is a transit country and a highly trade-oriented nation in Europe, this makes the railways less attractive. It is even difficult to attract to the railways freight that is particularly suited to rail. This has an adverse impact on road transport, the climate and the environment.

Description of the measure

A national strategy is to be developed to speed up the introduction of ETCS on the busiest rail corridors in Germany, taking account of demand-responsive hinterland connections to and from ports. The ETCS is a technical specification for the interoperability of rail transport in Europe. The strategy is to take account of the Federal Government's budget line earmarked for the infrastructure (existing network) and the costs, to be borne by the operators, of the equipment required for the rolling stock.

Impact

The strategy will lay the foundations for optimizing the use of the railways. It will be possible to enhance capacity and shift more traffic to the railways. This will make the railways more competitive, relieve congestion on the federal trunk roads and help to protect the environment and tackle climate change.

Responsibility

The Federal Ministry of Transport, Building and Urban Affairs, in cooperation with Deutsche Bahn (DB) AG and the federal states, is responsible for developing the strategy.

Budgetary relevance

The costs of the strategy will be within the limits of the current, increased financial planning of the Federal Ministry of Transport, Building and Urban Affairs.

EU relevance

This measure is consistent with the EU policy for the creation of a single European railway area, which is characterized by, among other things, TEN corridors and the goal of interoperability.

Implementation period

The strategy is to have been developed by 2010.

A 7 Develop a national ports strategy

Current situation

Our seaports and inland ports are of special strategic importance to our entire economy. They are part of the backbone of the globalized economy and are a hub for the exchange of goods within the Single European Market. For shippers, our seaports and inland ports are an indispensable link in the logistics chain. Given that the volume of cargo handled by German ports is set to double between now and 2025, and that the volume of containerized traffic will triple over the same period, Germany faces major challenges. In order to prevent capacity constraints at ports and in movements to and from ports, the transport infrastructure has to be modernized and adapted to meet the growing demand for freight transport. At the same time, German ports face fierce international competition, which requires fair rules. By lowering the fuel tax to be paid by port cargo handlers, the Federal Ministry of Transport, Building and Urban Affairs has already made a major contribution towards harmonizing the conditions of competition with the ARA ports. In addition, production and distribution are placing more exacting demands on freight transport and logistics. The port infrastructures and superstructures must therefore keep up with the state of the art. The problems are compounded by the fact that a lack of skilled workers in the maritime cluster is becoming apparent. The growth in the volume of cargo handled and the level of traffic to and from seaports pose new climate change and environmental protection challenges. The targeted and coordinated improvement of the landside and seaward approaches to the seaports, as well as their connection with the centres of economic activity in Germany, are among the key elements of German transport policy and the German transport industry.

There is a growing need for the coordination of a national ports policy, including the inland ports.

Description of the measure

To meet these challenges, the Federal Government, federal states and the industry have to assume joint responsibility and conduct joint activities. Ports policy has become a national task. For this reason, a national ports policy will be developed, containing measures that address the following thematic areas, among others:

- a) Infrastructures and suprastructures
 - The Federal Government funding available for investment will be focused even more than in the past on those projects that are especially important in macroeconomic terms.
 - The Federal Government will give priority to upgrading port hinterland links (road, rail and waterway) that have almost reached their capacity limits today and will have to cope with a disproportionately high growth in traffic levels in the future.
 - Possibilities for collaboration between seaports will be sought in a targeted manner.
 - Telematics solutions are to unlock additional efficiency potential at ports and in the logistics chain.
 - Where there are plans to convert ports or areas near ports for other urban functions, such as leisure, residential, office or other uses, care must be taken to ensure that this will not result in any adverse impact on the competitiveness of the location.
- b) Jobs
 - Job-generating measures are to be exploited to the full.

- Targeted programmes for the integration of the unemployed are to be supported.
 - Efforts to create apprenticeships for young people should be stepped up.
- c) Environmental protection and climate change
 - Emissions standards in the shipping sector (sulphur, nitrogen oxides, particulate matter) are to be evolved and maritime shipping is to be included in emissions trading in a manner that does not distort competition.
 - New propulsion technologies are to be developed and new materials used in shipbuilding.
 - d) Competition
 - Further measures to reduce distortions of competition are to be reviewed and – as far as possible – implemented.
 - State aids result in distortions of competition. Germany is lobbying in Europe for more transparency in this sphere. The European Commission is urged to present uniform state aid guidelines.
 - e) Combined transport
 - In order to cope with the forecast volumes of cargo, short sea shipping and inland navigation will also have to be strengthened. Here, the inland ports will play an increasingly important role, offering services ranging from a supra-regional hub to a regional distribution centre for the seaports.

Impact

This measure is designed to strengthen the ports as major import/export hubs and as logistics and processing centres.

Responsibility

The Federal Ministry of Transport, Building and Urban Affairs, the federal states and the

ports industry are responsible for this measure.

Budgetary relevance

It will not be possible to quantify the impact on the budget until the ports strategy has been drawn up.

EU relevance

This measure is consistent with the European Commission's ports policy.

Implementation period

The strategy will be presented in 2008.

A8 Develop a national airports strategy**Current situation**

Airports that are well developed, efficiently used and linked up with the rest of the transport system are indispensable infrastructure for worldwide trade. Airport infrastructure makes a major contribution to enhancing the attractiveness of Germany as a business location. The growing demand for air transport services calls for optimum use to be made of the existing infrastructure and for a strategy to be developed for evolution and, where appropriate, expansion, taking account of economic, ecological and social aspects, so that airports can continue to assert themselves in future international competition.

Description of the measure

The airport infrastructure is to be developed such that airports can perform their tasks for the economy and society in Germany in a manner that is macroeconomically efficient, profitable for business and sustainable. The construction of new airports and the expansion or conversion of existing airports should only take place if the economic benefits have been proved. Airports that are not economically self-sustaining will have to take second place. Against this background, the Federal Government will present an airports strategy before the end of this parliamentary term, which will be discussed with the federal states. The benchmarks of this strategy will be:

- a) Optimizing use of the existing infrastructure of aerodromes in Germany, including their demand-responsive and sustainable evolution, including expansion.
- b) Some types of air cargo require special time slots if they are to have an economic impact or to perform their function of providing a service of general interest (e.g. medical supplies). At the same time, consideration
- c) Current forecasts of air traffic growth predict that there is likely to be significant growth in landside traffic to and from airports in the future. This growth means that it will be necessary to provide sufficiently efficient surface access, by both road and rail.
- d) In the air cargo sector, there are interface problems in intermodal transport chains. Examples include non-standardized loading units and loading gauges, which require additional transshipment processes in onward movement by a second mode of transport, and non-compatible administrative processes in the fields of handling and customs. Such breaks in the process of transportation have an adverse impact on the competitiveness of intermodal freight transport, because they ultimately lead to higher prices, longer transportation times, poorer punctuality, restrictions as to the types of goods that can be transported, a higher risk of damage and greater handling effort. The Federal Ministry of Transport, Building and Urban Affairs will therefore make a contribution towards resolving the legal issues involved here – at European and international level wherever possible.
- e) The air transport sector, too, must play its part in tackling climate change and protecting the environment (e.g. by taking active and passive noise control and mitigation measures, including aviation in international emissions trading in a manner that does not distort competition, realizing the Single European Sky and emissions-based landing charges. Since the levying of taxes on domestic flights and on intra-European flights

must be given to protecting people against night noise.

between individual Member States would entail serious competitive disadvantages for the carriers of the EU Member States involved, the Federal Government believes that the introduction of a kerosene tax can, under the conditions prevailing at present, only be done on a worldwide basis).

Impact

The airports strategy is designed to result in transport infrastructure being developed and used in an optimum manner and in transport being shaped in an intelligent manner.

Responsibility

The airports strategy will be presented by the Federal Government.

Budgetary relevance

Funding is to be focused on investment that will have maximum economic benefit.

EU relevance

The development of an airports strategy is consistent with the transport policy objectives of the EU.

Implementation period

The strategy is to be presented before the end of the current parliamentary term.

A 9 Take concerted action with shippers and the freight transport sector to stagger freight traffic (extending ramp times)

Current situation

In many cases, the delivery times at consignees' premises and the collection times at shippers' premises, which are limited to specific time windows, mean that freight transport movements do not make efficient use of the infrastructure. In some cases, significant resources and capacity are expended unnecessarily or remain unused. The consequences are a rise in congestion, an intensification of the competition between passenger and freight transport for use of the infrastructure, increasing calls for higher levels of infrastructure investment and adverse impacts on the supply chain.

Description of the measure

Within the framework of concerted action, a strategy will be developed to make delivery and collection windows more flexible in order to make optimized use of the infrastructure and vehicles, without calling existing restrictions into question, e.g. the ban on driving on Sundays and public holidays and noise abatement. The importance of having order placement times that are as late as possible, haulage times that are as short as possible, delivery times that are as early as possible and collection times that are as late as possible, is to be reviewed from the perspective of all those involved in the transport chain to see whether these times can be made more flexible and if there is any scope for efficiency. Here, it is up to shippers, in particular, to exploit opportunities for optimization, thereby making a contribution towards enhancing the efficiency of the overall transport system. The concerted action is designed to raise awareness of the problems and provide an impetus for improvements.

Impact

If wider time windows are available for collecting, transporting and delivering the goods, transport operations can be optimized and more efficient use can be made of the infrastructure. This will help to segregate freight and passenger traffic and reduce both CO₂ emissions and the need for investment.

Responsibility

All parties involved in the transport chain, with the Federal Ministry of Transport, Building and Urban Affairs acting as a facilitator. Shippers (major shippers/chain stores), in particular, are to be involved, plus the retail trade and hauliers.

Budgetary relevance

This measure will be funded from the Federal Ministry of Transport, Building and Urban Affairs' budget.

EU relevance

This measure is consistent with EU transport policy with regard to making more efficient use of the existing infrastructure.

Implementation period

Planning and implementation of the concerted action is to be launched in 2008.

A 10 Create a focal point – the Federal Government Commissioner for Freight Transport and Logistics

Current situation

In addition to the Federal Ministry of Transport, Building and Urban Affairs, which is the lead department, several other ministries are involved in the freight transport and logistics sphere. They include the Federal Ministry of Economics and Technology, the Federal Ministry of Education and Research, the Federal Ministry of Labour and Social Affairs and the Federal Ministry for the Environment, Nature Conservation and Nuclear Safety. They regularly take initiatives which require more and more coordination because of the increasingly complex research and funding activities.

Description of the measure

To better coordinate the Federal Government's research and funding activities and make them more transparent, the Permanent State Secretary at the Federal Ministry of Transport, Building and Urban Affairs, Matthias von Randow, will be appointed Federal Government Coordinator for Freight Transport and Logistics. In addition, an interministerial freight transport and logistics coordinating group, chaired by the Federal Ministry of Transport, Building and Urban Affairs, will be established.

Impact

This measure will facilitate a better link-up between the issues and activities of the ministries involved. This is designed to result in a more targeted allocation of the funds available. The purpose of cooperation in the committee will not only be to improve communication between the ministries, but also to convey the great importance that the Federal Government attaches to this issue. A central overview will provide all government departments with

more transparency in the control of priority research activities in the field of freight transport and logistics. This means that it will be possible to better control the allocation of funds as a whole and to translate findings into practice more efficiently.

Responsibility

The Federal Ministry of Transport, Building and Urban Affairs is responsible for establishing the coordinating body.

Budgetary relevance

The establishment of the coordinating body will not require any additional funding from the budget.

EU relevance

This measure is consistent with EU suggestions to make public administration more efficient.

Implementation period

This measure is to be implemented immediately.

B Avoiding unnecessary journeys – ensuring mobility

B 1 Urban Logistics Initiative

Current situation

In cities and conurbations, freight transport and logistics are often perceived as an obstacle to the smooth flow of traffic. At the same time, delivering goods right to the customer's doorstep is presenting the logistics sector with an increasingly difficult challenge. Because of their often short duration and because they were often not binding, the projects and measures carried out in the field of city logistics in the past have not resulted in the development of a successful model that has been able to assert itself on the market. Nevertheless, there have been a number of innovative and – at least partially – successful projects, for instance the freight tram at the freight village in Dresden. In addition to operational measures, more account has been taken of spatial planning requirements when planning freight villages, which has resulted in commercial transport movements taking place with fewer conflicts. Last but not least, several major German cities (e.g. Bremen) have integrated their freight villages as essential components into their schemes to meet EU air quality management requirements. It has also become apparent that it is unrealistic to consider passenger and freight transport separately in towns and cities. If environmental aspects are to be reflected more strongly and efficiency is to be significantly enhanced, the focus has to be on both systems.

Description of the measure

Launch of a nationwide initiative, sponsored by the Federal Ministry of Transport, Building and Urban Affairs, the federal states and cities, with the aim of developing environmentally friendly and climate-friendly strategies for urban transport, formulating transferable standards and implementing them in cooperation with local authorities. These strategies

are to be based on the following guidelines, among others:

- better account should be taken of the interests of commercial transport in urban planning;
- better account should be taken of the interests of freight transport and logistics in spatial and sub-regional planning;
- affordable, environmentally friendly and user-friendly local transport schemes, which encourage as many people as possible to use public transport;
- incentives to use environmentally friendly delivery vehicles;
- better link-up between the decision-making and implementation levels;
- better communication between business practice and planning decisions.

Impact

This measure will lead to agreement on strategies for sustainable transport in conurbations.

Responsibility

Federal Ministry of Transport, Building and Urban Affairs, federal states, freight transport associations, freight village operators, local government associations, industry (as shippers and consignees).

Budgetary relevance

Launching the transport strategies will not require any additional funding from the budget.

EU relevance

This measure is consistent with the objectives of the Urban Transport Green Paper. The principle of subsidiarity must be complied with in its implementation.

Implementation period

This measure is to be implemented over the period from 2009 to 2012.

B 2 Step up investment in innovative and capacity-enhancing technologies

Current situation

The existing modes and systems of transport still have untapped potential for enhancing the efficiency of the transport system. Given that the volume of freight traffic is forecast to rise and that the existing infrastructure will reach its capacity limit, and in view of the increased consumption of resources, the development and implementation of innovative technologies, systems or services to make more efficient use of the infrastructure and resources is of crucial importance in ensuring a promising future for Germany as a logistics centre. Examples of thematic areas include:

- longer trains on selected routes;
- double-decker trains on selected railway lines;
- cargo rail feeder services between Leipzig and Frankfurt/Main;
- Galileo applications;
- transport logistics/intralogistics interfaces (automation);
- ITS solutions (HGV routing);
- multi-layer container transport in inland navigation on selected waterways;
- innovative and efficient vehicle strategies (road, rail, waterway).

Description of the measure

Consideration and, if necessary, development of funding guidelines to support pilot projects to make greater use of innovative technologies in freight transport and logistics. This is designed to fund projects other than combined transport handling technologies, which can make a contribution towards enhancing the overall system but are not eligible for funding today because they are no longer at the research stage and have not yet been launched on the market.

Impact

Pilot projects involving innovative technologies and systems in the transport sector are designed to drive forward innovations in intermodal transport and process chains. This will speed up the implementation and introduction of these innovative technologies on the market, which will result in a more efficient, more climate-friendly and more environmentally friendly freight transport and logistics system. In particular, it will be possible to make better use of existing capacity and vehicles, conserve resources, enhance economic efficiency, reduce CO₂ emissions and improve transport safety.

Responsibility

The Federal Ministry of Transport, Building and Urban Affairs is responsible for developing the funding guidelines. The industry is responsible for the applications.

Budgetary relevance

The costs of the measure will be within the limits of the current, increased financial planning of the Federal Ministry of Transport, Building and Urban Affairs.

EU relevance

This measure is consistent with the EU policy of making greater use of innovative technologies to manage future traffic growth and to improve the profile and image of Europe as a place to do business. The financial assistance programme will require European Commission approval.

Implementation period

Work on developing the funding guidelines will commence in 2008.

B3 Optimize transit traffic

Current situation

Transit traffic whose origin and destination are abroad will, in the future, account for an ever larger share of road haulage and rail freight. The transport interconnectivity forecast for Germany predicts that there will be a 2.5-fold increase (in terms of tonne-kilometres) by 2025. This means that the rise in transit traffic will be twice as high as the rise in freight traffic in Germany as a whole. The share of transit traffic is especially high in containerized rail freight. On certain corridors, some of which run through densely populated conurbations or regions that are important for tourism, transit traffic is thus resulting in a considerable nuisance in the form of noise, pollutants and CO₂ emissions and causing wear and tear on the infrastructure.

Description of the measure

At the European level, options are being explored as to how transit traffic can be optimized and, for instance by creating new delivery routes and by means of feeder services to and from the Mediterranean ports, shortened or even reduced. To this end, the Federal Government will place this issue on the European agenda, taking care to safeguard the interests of German businesses and ports. In parallel, approaches are being developed at European level to identify market-based incentives to shift more traffic to the railways and waterways, especially over long distances. The Federal Ministry of Transport, Building and Urban Affairs will have a study prepared on this subject.

Impact

Optimization of transport by reducing the number of transit journeys and by using shorter or more energy-efficient routes through

Europe (e.g. short sea shipping or inland waterway transport).

Responsibility

Federal Ministry of Transport, Building and Urban Affairs, federal states, EU, shippers and hauliers, ports.

Budgetary relevance

This measure will not require any additional funding from the budget.

EU relevance

Solutions can only be found at European level.

Implementation period

Discussions are to start immediately.

B4 Short Sea Shipping

Current situation

Germany is having to cope with a rising volume of purely transit traffic. Especially hard hit is the north-south transit corridor through Germany, with a sizeable share of traffic to Spain and Portugal. Current forecasts predict that traffic levels on this corridor will rise at a disproportionately high rate, and the consequences will be increasing noise, pollutant and CO₂ emissions. Short sea shipping, including inland navigation to a greater extent, can help to relieve the burden on this corridor. The cargo is transhipped at overseas ports and continues its journey on so-called motorways of the sea. Motorways of the sea are maritime corridors with a high volume of shipping to which freight traffic is shifted to ease the burden on roads and railways. Successful projects in the Baltic Sea region illustrate that short sea shipping allows traffic to be shifted from the roads to the sea.

Description of the measure

Development of a strategy for shifting road haulage traffic on the north-south corridor to the waterborne mode by making use of the possibilities of short sea shipping and inland waterway transport. At the same time, the projects in the Baltic Sea are to be evolved.

Impact

Lasting relief of congestion on the roads of the north-south corridor, reduction in CO₂ emissions and noise along the corridors.

Responsibility

Federal Ministry of Transport, Building and Urban Affairs, EU, shippers and hauliers, Association of German Seaport Operators (ZDS). Expert support will be provided by the Short Sea Shipping Inland Waterway Promotion Centre

(SPC). As a whole, this measure will require intensive multilateral and EU cooperation.

Budgetary relevance

Initially no impact on the budget. If it was intended to implement the strategy, start-up financing through the EU's Marco Polo programme could be considered.

EU relevance

The EU is promoting a greater development of short sea shipping and motorways of the sea through its Marco Polo programme and in accordance with the TEN-T guidelines.

Implementation period

Work on developing a strategy is to commence in 2008.

C Shifting more traffic to the railways and inland waterways

C 1 Review the regulatory framework for freight transport in intermodal competition

Current situation

A major constituent of an integrated transport policy in Germany and Europe is co-modality. All modes of transport are to be able to deploy their inherent strengths on a level playing field. The conditions of competition currently vary from one mode to the next, which may result in distortions of competition between the individual modes in freight transport. Against this background the question arises: Does the present-day modal split reflect fair conditions of competition in the interests of co-modality, and if not, what has to be changed to establish such conditions?

Description of the measure

Preparation of a report to review the current situation of the individual modes in freight transport and, if appropriate, to formulate proposals for the establishment of fair conditions of competition. This will involve, for instance, the impact of cost factors on competition (user pays principle, costs of accidents, environmental costs, infrastructure costs, electricity tax in rail transport, and the like).

Impact

The report will provide a better overview of the impact of the regulatory framework in intermodal competition and, if appropriate, formulate a list of proposals, the implementation of which can guarantee competition that is as fair as possible. In addition, this measure is designed to prevent a situation from arising where a shift of traffic to the railways and inland waterways is hampered by the lack of a level regulatory playing field.

Responsibility

The Federal Ministry of Transport, Building and Urban Affairs is the lead department,

with the Federal Ministry of Finance, Federal Ministry for the Environment, Nature Conservation and Nuclear Safety, and the Federal Ministry of Economics and Technology also involved.

Budgetary relevance

The report will be funded from the Federal Ministry of Transport, Building and Urban Affairs' budget.

EU relevance

The report will be consistent with EU policy.

Implementation period

The report is to be drawn up in 2009.

C 2 Increase funding for combined transport

Current situation

The existing intermodal handling facilities at all logistics hubs in Germany – in the industrial centres in the interior of the country, at inland ports, in the areas around seaports and in border regions – are working at or near their capacity limit. In addition, some air cargo feeder services are to be transferred from road to rail. Current forecasts, for instance the forecast of transport interconnectivity for 2025, predict there will be a disproportionately high and sustained demand for intermodal transport in the future. Today, funding totalling around € 62.5 million is available annually in the federal budget for the co-financing of combined transport terminals. However, there are already numerous requests for the construction of new handling facilities or the upgrading of existing facilities which cannot be met because of a shortage of funds.

Description of the measure

Increase of funding for the construction/upgrading of combined transport transshipment facilities from its current annual level of € 62.5 million to € 115 million a year. In addition, a total of € 32 million per annum will be available for the funding of rail sidings.

Impact

Making greater use of transport chains, which combined transport makes possible, will help to enhance the capacity of the overall system, to shift freight traffic from the roads to the railways and waterways and to bring about more environmentally friendly transport operations. The ongoing evaluation of the guidelines on the promotion of combined transport transshipment facilities revealed (in February 2008) that this investment will probably result in a total of around 78 million tonnes or 49.3

billion tkm being shifted. This would cut CO₂ emissions by around 7.5 million tonnes per annum.

Responsibility

The Federal Ministry of Transport, Building and Urban Affairs and Federal Ministry of Finance are responsible for implementing this measure.

Budgetary relevance

The additional funds required will be provided as part of the current, increased financial planning of the Federal Ministry of Transport, Building and Urban Affairs.

EU relevance

This measure is consistent with EU policy, which aims to strengthen combined transport in Europe and to establish green transport corridors as a measure of the Freight Transport Logistics Action Plan.

Implementation period

Funding is to be provided starting in financial year 2009.

C3 Evolve handling technologies and organization in combined transport

Current situation

The current disproportionately high demand for intermodal transport services will increase even further in the future. To meet this demand, the capacity of the composite systems comprising the railways, roads and waterways has to be enhanced. Innovative handling technologies such as

- parallel horizontal loading,
- parallel automated horizontal loading or
- waterborne container movements within ports

can make it possible to achieve efficiency gains and offer a range of services that meets demand. However, many innovative developments fail because of the high costs involved in a pilot project that has to be carried out before potentially successful commercialization.

Description of the measure

Introduction of funding guidelines to provide assistance to pilot projects that support the evolution of innovative handling technologies in combined transport. This is designed to make it possible to provide financial assistance to pilot projects in combined transport that cannot be funded through the existing programmes because they are already beyond the research stage and have not yet been launched on the market.

Impact

These new funding guidelines are designed to improve the introduction of new handling technologies onto the combined transport market. This is to enhance the efficiency of combined transport and incentivize a shift of traffic to the environmentally friendly inland navigation and rail modes. This will also make a contribution towards tackling climate change and protecting the environment.

Responsibility

The Federal Ministry of Transport, Building and Urban Affairs is responsible for drawing up the funding guidelines.

Budgetary relevance

The costs of this measure will be within the limits of the current, increased financial planning of the Federal Ministry of Transport, Building and Urban Affairs.

EU relevance

This measure is consistent with EU policy, which aims to strengthen combined transport in Europe. Supporting combined transport is one of the subjects of the EU's Freight Transport Logistics Action Plan. The financial assistance programme will require European commission approval.

Implementation period

Work on developing the funding guidelines is to commence immediately. The preparatory period leading up to the entry into force of the funding guidelines will probably be more than one year.

C4 Internalize external costs

Current situation

External costs are those costs that are not captured by market prices, which means that investment and use decisions taken on the basis of these market prices are less than economically optimum. In the transport sector, these are essentially the external costs of:

- air pollution;
- climate change;
- noise;
- accidents;
- congestion.

If the prices for transport services are too low with regard to external costs, this will result in the price for the transport service in question not reflecting all the costs. Thus, the demand for this transport service is too high. This can result, among other things, in a waste of raw materials (e.g. water, fossil energy sources).

Description of the measure

A strategy is to be developed to better internalize external costs, taking account of the forthcoming amendment to the EC Infrastructure Charging Directive (cf. decisions taken at the special cabinet meeting in Meseberg). This will also make a contribution to the European discussion of external costs, so as not to have an isolated adverse impact on the competitiveness of the German freight transport industry.

Impact

The strategy will produce greater transparency regarding the nature and level of the costs to the economy of individual means of transport, which can be used as a decision-making basis for transport and economic policies.

Responsibility

The Federal Ministry of Transport, Building and Urban Affairs is responsible for developing the strategy.

Budgetary relevance

The development of the strategy will not entail any costs for the budget.

EU relevance

This measure is consistent with EU transport policy. In June 2008, the European Commission will present a proposal for the revision of the Infrastructure Charging Directive with a view to internalizing external costs.

Implementation period

The schedule and subject matter of the deliberations will have to be coordinated with the European Commission's proposal for a revision of the Infrastructure Charging Directive.

D Upgrading more transport arteries and hubs

D 1 Segregate freight and passenger traffic

Current situation

The growth in traffic levels, especially in the freight sector, is increasingly resulting in conflicts in the use of the transport infrastructure between freight and passenger traffic and between heavy goods vehicle traffic and private traffic. This is impeding the free flow of traffic and having an adverse impact on the efficiency of the transport infrastructure.

- There are increasing capacity constraints on the busiest rail freight lines. On the north-south corridors, in particular, there are either no paths available or, where they are available, they are limited or only available at times that are not compatible with the market. These constraints have various causes, including competition with regular interval passenger services for use of the infrastructure.
- On busy four-lane sections of federal motorway, HGVs pulling out to overtake, in particular, cause critical situations with faster moving passenger cars. This slows down the flow of traffic and reduces efficiency. This problem is likely to get worse with the forecast growth in traffic levels.

Description of the measure

By reducing pathing conflicts between regional passenger rail services and rail freight services, and by taking targeted action to remove bottlenecks on both the railways and the roads, a greater separation of the different types of traffic on busy routes is to be achieved. This segregation is designed to increase permeability, improve transport safety and reduce the risk of congestion. This measure is also designed to result in improvements in passenger transport, because the bottlenecks concerned are predominantly on mixed-use routes. Options for resolving pathing conflicts are to be reviewed and, if appropriate, a strategy is

to be developed. In this context, the possibility of extending the prioritization of freight traffic during the night is to be explored. The measures are to be shaped such that they are acceptable and with balanced approaches to passenger traffic.

As far as the removal of bottlenecks on the railways is concerned, DB AG's "Network 21" strategy is to be continued and accelerated. DB AG's "Network 21" strategy includes the aim of segregating slow and fast services, and is also reflected in federal transport infrastructure planning and the planning of requirements. The most efficient way to segregate freight and passenger traffic on the roads is by widening federal motorways to six and eight lanes. The appropriate construction work is to be carried out more quickly than in the past to upgrade the relevant sections of federal motorway.

Impact

- Removal of bottlenecks on the railways: The continuation and acceleration of DB AG's "Network 21" strategy will make railway infrastructure lines and hubs more permeable and will make it possible to improve the quality of freight transport and to enhance pathing capacity. Experts believe that it is mostly comparably small-scale investment projects that – in relation to the line concerned – will result in an enhancement of the efficiency of the network capacity (gaining additional paths) in the range of 10 to 20 %.
- Pathing conflicts: Experts believe that even minor flexibilization measures, such as moving the schedule of one train by a few minutes or adjusting the slot of one train per hour in a regular interval service, can result in a perceptible enhancement of rail freight pathing capacity, especially at times that are relevant to the market.

- Removal of bottlenecks on the roads: Widening to six lanes those stretches of federal motorway that are busy and of prime importance to road haulage will enhance the capacity of the sections concerned by up to 50 %. This will make them correspondingly more permeable for HGVs and passenger cars, and is absolutely essential if the forecast growth in levels of both types of traffic is to be better absorbed. If bottlenecks are removed on the road, it will not be necessary to introduce "area-wide" bans on overtaking for heavy goods vehicles. Implementation of this measure will reduce the frequency of congestion and accidents and thus also the social costs of transport. In addition, the reduction in the number of traffic jams and accidents will make road haulage services easier to plan and more reliable across the entire network. This will make the deployment of resources more efficient, both for logistics service providers and for trade and industry (less capital-tie up for buffer stock and equipment, improved turnaround). Ultimately, the measure is also designed to counter an economically inefficient downsizing of the vehicle fleet: in order to get round the obstacles that heavy goods vehicles face, such as bans on overtaking and speed limits, logistics service providers are, in some cases, operating smaller, faster vehicles (light vans) rather than long-distance HGVs on time-sensitive and just-in-time transport markets.

Responsibility

- DB Netz AG is responsible for removing bottlenecks on the railways.
- The resolution of pathing conflicts, where this is appropriate and possible, is the responsibility of DB Netz AG in consultation with the Federal Network Agency and with the involvement of railway underta-

kings and the federal states affected (as the authorities that order local transport services).

- The Federal Ministry of Transport, Building and Urban Affairs, in consultation with the federal states, is responsible for removing bottlenecks on the federal motorways.

Budgetary relevance

The updated financial planning includes significantly higher levels of investment for the removal of bottlenecks. In 2009, an additional € 1 billion (approx.) will be made available.

EU relevance

These measures are consistent with the freight transport logistics actions that the EU intends to take.

Implementation period

These measures are due to be launched immediately.

D 2 Review the requirement plans

Current situation

To prioritize transport infrastructure investments, the Federal Government develops a Federal Transport Infrastructure Plan. This makes it possible – on the basis of the available traffic forecasts and a cost analysis plus an environmental impact assessment and a spatial impact assessment of the individual projects – to identify those measures that have a high level of efficiency in terms of transport and the national economy. To implement the Federal Transport Infrastructure Plan, requirement plans, which contain the first priority projects, have been included in the Railway Infrastructure Upgrading Act and the Federal Trunk Road Upgrading Act.

Since the adoption of the most recent Federal Transport Infrastructure Plan in 2003, based on the traffic forecast dating from 2001, and the related upgrading acts/requirement plans, there has been a further change in the general framework and prospects for the future. Trends in traffic growth, demographic change, globalization and new climate change and environmental protection requirements present Germany with new challenges, which are reflected in the demand for transport, in particular. They also include the impact of new technologies, innovations and new logistics processes.

Description of the measure

A start is to be made immediately on reviewing the requirement plans, as provided for by law, and subsequently adapting them if necessary, so that a report can be submitted to parliament in 2010 and any necessary adaptation of the requirement plans can be initiated in a timely fashion. The review of the requirement plans also follows, in particular, the transport policy guidance set out in this Freight Transport and Logistics Masterplan. The review

must also take account of the requirements of inland waterways, even if a requirement plan does not explicitly have to be prepared for this sector.

Impact

By launching this measure, it will be possible to secure the investment priorities as early as possible.

Responsibility

The Federal Ministry of Transport, Building and Urban Affairs is responsible for updating the Federal Transport Infrastructure Plan and the associated upgrading acts.

Budgetary relevance

It is estimated that the costs of the reports and studies will be € 3 to 5 million. This measure will be funded from the Federal Ministry of Transport, Building and Urban Affairs' budget.

EU relevance

This measure will also impact on routes that are the subject of the trans-European networks.

Implementation period

It will be possible to conclude the review of the requirement plans in 2010.

D 3 Press ahead with the implementation of PPP solutions for the speedy and efficient delivery of motorway widening and motorway maintenance projects

Current situation

The federal trunk road network currently comprises over 12,500 km of motorways and around 41,000 km of federal highways, and is thus the densest trunk road network in Europe. Maintaining and upgrading this trunk road network requires a high level of financial expenditure. With the introduction of the heavy goods vehicle tolling scheme, the establishment of the Transport Infrastructure Financing Company and the use of operator models, there now exists in Germany, for the first time ever, a wider range of sources for infrastructure funding. One of the ways of achieving this is by widening the terms of reference of the Transport Infrastructure Financing Company. The involvement of private sector capital through public private partnership (PPP) or other forms of funding can result in faster and more cost-effective delivery. PPP has established itself as a form of funding in the transport sector. Greater use is to be made of it where it provides better value for money than conventional public funding.

Description of the measure

PPP solutions in the road construction sector are to be encouraged for suitable projects. PPP will be examined to see whether it is a suitable way of solving the problems of parking space on federal motorways.

Impact

Pressing ahead with the use of PPP for suitable projects in the road construction sector will result in benefits to the national economy. The involvement of private sector capital will make it possible, in particular, to implement major projects earlier. In addition, it can result in shorter construction periods.

Responsibility

The Federal Ministry of Transport, Building and Urban Affairs is responsible for this measure.

Budgetary relevance

Suitable PPP projects generate a more efficient economic return than is the case with conventional public funding.

EU relevance

PPP solutions are practised in many EU countries.

Implementation period

This measure is to be implemented immediately.

E Environmentally friendly, climate-friendly, quiet and safe transport

E 1 Develop a strategy to vary toll rates according to the route driven and the time of day

Current situation

The steady increase in traffic levels is producing a growing number of congestion-prone sections of road. The possibility of varying toll rates by place and time could have a regulatory impact on the levels of congestion on these sections. At its special cabinet meeting in Meseberg in August 2007, the Federal Government decided to achieve an improved regulatory impact through the HGV tolling system.

Description of the measure

Development of a toll rate model that uses route and time of day categories in addition to the regulatory impact based on weight and emissions. The Federal Highway Research Institute is to develop a strategy to identify the potential inherent the HGV tolling system for a regulatory impact through a variation of tolls according to the route driven and the time of day, taking account of the impacts on the logistics sector and the economy. The federal states will be involved.

Varying toll rates according to the route driven would at present already be legally permissible and technologically feasible, in both the automatic and manual systems. Tolls varied by time are currently only feasible using the automatic procedure, because here the journey data recorded by the on-board unit is accurate to the minute so that the applicable rate can be calculated simultaneously. This means that tolls varied by time can only be realized if there is even greater market coverage with the automatic system.

Impact

This measure is designed to prevent congestion and produce a better segregation of traffic. It is to identify the extent to which differential tolling – taking account of the costs of toll collection – can make a contribution to this

objective, thereby making transport more environmentally friendly and reducing its climate change impact.

Responsibility

The Federal Ministry of Transport, Building and Urban Affairs is responsible for implementing this measure.

Budgetary relevance

This measure has no budgetary relevance, because the so-called Eurovignette Directive (Directive 1999/62/EC) states that differential charging has to be fiscally neutral. Graduating charges according to the route driven and the time of day is not designed to generate any additional toll revenue. The funds needed to develop the tolling system will have to be generated from toll revenue.

EU relevance

The Eurovignette Directive imposes limits on the extent to which charges may be graduated. It states that the difference between the cheapest and the most expensive toll rate may be up to 100% and that graduated charging has to be fiscally neutral.

Implementation period

The Federal Highway Research Institute is to propose in 2008 a strategy to identify the potential inherent in the HGV tolling system for a regulatory impact through a variation of tolls according to the route driven and the time of day.

E 2 Mitigate noise on the railways

Current situation

The problems associated with noise are especially acute in rail transport, because mainlines frequently run through densely populated areas and cause considerable noise nuisance for people living near these lines. Against the background of increasing transport operations, the rising levels of noise emissions they entail must be minimized. In addition to the construction of noise barriers, the procurement of low-noise freight wagons and the retrofitting of existing wagons to make them quieter are of particular importance.

Description of the measure

Creation of incentives for the retrofitting of rolling stock to reduce the noise caused by freight wagons, by introducing an effective differentiation of track access charges based on noise emissions.

Impact

The speedy introduction of as many low-noise freight wagons as possible will make it possible to reduce transport noise and the impairment of health it causes, thereby making transport more environmentally friendly and reducing its climate change impact.

Responsibility

The Federal Ministry of Transport, Building and Urban Affairs and railway infrastructure managers are responsible for implementing this measure.

Budgetary relevance

The budgetary relevance of this measure will depend on the nature of the differentiation.

EU relevance

This measure is consistent with EU transport policy (see also the EU's Freight Transport Logistics Action Plan).

Implementation period

This measure is to be implemented within five years.

E3 Establish a financial assistance programme to encourage the use of modern technologies to reduce the noise caused by rolling stock

Current situation

The problems associated with noise are especially acute in the rail freight sector, because mainlines frequently run through densely populated areas and cause considerable nuisance for people living near these lines. Residents' quality of life could be improved by the use of new technologies, such as innovative brake blocks for freight wagons. The development and retrofitting of improved brake block types entails risks and opportunities for railway undertakings. At present, however, there are neither incentives nor obligations to undertake such a retrofit.

Description of the measure

A pilot project is to be launched for the retrofitting of existing freight wagons to reduce the noise they cause. On a selected busy corridor (Rhine Valley), the short-term use of quiet freight wagons is to deliver practical findings about the necessary engineering and authorizations. In parallel, a programme component for the collection of data on wagons is to lay the foundations for further measures, especially with regard to a revenue-neutral emissions-based rail infrastructure charging system. The objective of the innovation programme is to further improve noise-reducing retrofit solutions for older, noisy freight wagons and to make these solutions more widely available. The aim is to reduce the costs of developing improved brake block types for retrofitting and to speed up development.

Impact

This measure will help to make transport more environmentally friendly and reduce its impact on climate change by seeking to substantially reduce the level of noise caused by

the freight wagon fleet, thereby significantly mitigating the impact of noise on residents.

Responsibility

The pilot and innovation programme will be controlled by an interministerial working group with the Federal Ministry of Transport, Building and Urban Affairs as lead department, EU (state aid issues, possibly uniform EU solution).

Budgetary relevance

The 2008 federal budget includes 100 million euros in the "noise mitigation" item. Of this sum, 10 million euros are ring-fenced for the pilot and innovation programme. A total of up to 40 million euros, distributed over four years, will be provided for this purpose.

EU relevance

This measure will require European Commission approval.

Implementation period

Around two to four years will be required to retrofit the wagons.

E4 Optimize processes in the logistics chain taking greater account of environmental concerns

Current situation

Efficient logistics systems and networks are a crucial factor in the success of businesses and locations in national and international competition. However, efficient systems do not, by themselves, automatically mean that optimum consideration is given to environmental concerns. Examples do show, however, that technological innovations and optimized processes, with the involvement of producers, can result in better profitability and competitiveness while taking account of environmental concerns.

Description of the measure

Incentives are to be developed to optimize processes in the logistics chain taking greater account of environmental concerns. In particular, the impact of financial assistance incentives for voluntary environmental certification (e.g. ISO 14001 and EMAS) of the logistics chain is to be considered.

Impact

This measure is designed to enhance the efficiency of the logistics chain and to result in further contributions being made to environmental protection and climate change mitigation, for instance by reducing CO₂ emissions.

Responsibility

Incentives and, if appropriate, funding strategies will be developed by the Federal Ministry of Transport, Building and Urban Affairs. Shippers, forwarders and logistics operators will be responsible for implementing the measures.

Budgetary relevance

The funding required for public sector financial assistance programmes is estimated to be around € 4 to 6 million per annum. This

measure will be funded from the Federal Ministry of Transport, Building and Urban Affairs' budget.

EU relevance

This measure is consistent with EU environmental and transport policy, according to which freight transport and logistics can make a contribution to environmental protection and climate change mitigation, in particular by unlocking potential for CO₂ savings.

Implementation period

The strategy is to be developed in 2008/2009.

E5 Further tighten environmental and safety standards (emissions reduction, noise mitigation, safety technology)

Current situation

The Federal Government has set itself the objective of reducing the greenhouse gas emissions caused by Germany by 40 % by 2020 compared with 1990 levels. The transport sector has to play its part in achieving this goal. This applies especially to heavy goods vehicle traffic, because road haulage accounts for one third of all CO₂ emissions from road transport. In addition, the fact that current forecasts predict a growth in levels of freight traffic means that legitimate questions of transport safety and noise mitigation are increasingly becoming the focus of public attention.

Description of the measure

The existing programme of innovation is to be evolved – possibly within the framework of the toll compensation measures – towards the provision of further financial assistance to encourage the purchase of cleaner and quieter HGVs. In addition, it is also to cover issues relating to transport safety technology and efficient logistics systems. In this way, for instance, electronic stability programmes such as ESP and other modern safety technologies, especially driver assistance systems, could be introduced earlier than required by law. In inland navigation, the existing financial assistance programmes to encourage the purchase of low-emission engines and particulate traps will be optimized and, if appropriate, continued. Using more biofuels in the freight transport sector can also help to reduce CO₂ emissions. In this context, possibilities for using more vegetable oil and biodiesel in HGVs, local public transport and inland navigation, including technical conversion, should be explored.

Impact

These measures are designed to help reduce CO₂ emissions and improve safety in the road haulage sector.

Responsibility

The Federal Ministry of Transport, Building and Urban Affairs has lead responsibility for evolving the programmes of innovation.

Budgetary relevance

Implementation of the measures will have a neutral impact on the budget.

EU relevance

This measure is consistent with the EU objectives of making freight transport climate-friendly and environmentally acceptable and improving road safety. The financial assistance programme will require European Commission approval.

Implementation period

Work on developing the funding guidelines is to commence in 2008. The preparatory period leading up to the entry into force of the funding guidelines will probably be more than one year.

F Good working conditions and good training in the freight transport industry



F 1 Step up the enforcement of social legislation in the road haulage sector to improve road safety

Current situation

Infringements of road safety rules or social legislation are often a major factor in serious road accidents. Monitoring compliance with these rules makes a major contribution to general road safety and to the protection of the social welfare of the crews.

Description of the measure

Continuous, targeted evaluation of the results of checks carried out by the Federal Office for Goods Transport and the federal states, including checks of vehicles from other EU Member States and third countries (monitoring).

- At the national level, proposals for improving the checking strategy are to be derived from the results. If necessary, special checks are to be carried out.
- At the European level, the results are to inform the evolution of the regulatory framework.
- In addition, at national level, the issue is to feature more strongly in training, for instance of professional drivers, haulage operators and logisticians.

Impact

This measure will result in better compliance with social legislation in the freight transport industry.

Responsibility

The Federal Ministry of Transport, Building and Urban Affairs, the Federal Office for Goods Transport, the federal states and the bodies that provide training are responsible for implementing the measure.

Budgetary relevance

Implementation of the measure will have a neutral impact on the budget.

EU relevance

When the measure is implemented, the European regulatory framework governing the road haulage sector is to be observed.

Implementation period

The measure is to be implemented continuously starting in 2008. Initial results are expected in the summer of 2008.

F 2 Launch a basic and further training initiative

Current situation

In all spheres of logistics, there is an increased need for skilled personnel. This need ranges from professional drivers to highly skilled professionals with an academic background. Despite this, far too few operators have so far offered their employees a range of basic and further training courses. It is imperative that operators be made more aware of the potential benefit of a wider range of skills schemes and develop their commitment to widening the range of in-company training courses. There is great unused potential here which, if unlocked, will help to meet the demand for skilled workers and produce additional scope for enhancing productivity. The contents of the training courses will have to be continuously adapted (technically, organizationally, etc.) to ongoing developments arising as a result of globalization, for instance.

At present, over 40% of those employed in the freight transport and logistics sector have no vocational qualification. If this sector of the economy is to have a promising future, the skills of its workforce have to be improved. To solve these problems, all the stakeholders, i.e. industry, training institutions and public authorities, have to cooperate more closely than they have done in the past. The National Pact for Training and Young Skilled Workers in Germany is one example of successful cooperation in the field of training. Similar schemes have to be created for further training.

Description of the measure

Workshops and information meetings are to be held for better link-up and cooperation between the players at the working level, and an image campaign is to be launched to highlight career opportunities in the logistics

sector. As the regulatory body responsible for 90% of all training regulations, the Federal Ministry of Economics and Technology will also issue practice-oriented training regulations that reflect the requirements of industry and technology, as it has already done in recent years for the fields of freight forwarding, inventory management and courier, express and postal services. As far as further training is concerned, the Federal Ministry of Education and Research, as the department responsible, will develop appropriate schemes, with the involvement of the social partners, in particular.

Impact

By quickly relieving the shortage of personnel, raising the skills level and improving the sector's image, we will lay the foundations for good working conditions and good training in the freight transport industry.

Responsibility

The Federal Ministry of Transport, Building and Urban Affairs will be the initiator, together with the Federal Ministry of Economics and Technology and the Federal Ministry of Education and Research. Training institutions in cooperation with the business community, the Association of German Chambers of Industry and Commerce, freight transport associations, the Federal Employment Agency, the Federal Institute for Vocational Education and Training and the German Logistics Association.

Budgetary relevance

Implementation of the measure will have a neutral impact on the budget.

EU relevance

This measure is consistent with EU transport policy (see also the EU's Freight Transport Logistics Action Plan).

Implementation period

Starting in 2009, for a period of initially five years.

F3 Hold regular summits on the subject of work and training in the freight transport and logistics sector**Current situation**

The availability of sufficient well trained personnel at all levels of activity is absolutely essential if operators are to have efficient process and transport chains and enhance their corporate efficiency. In addition, working conditions are of crucial importance to the efficiency of the workforce and the attractiveness of the various occupational profiles. Today, already, there is increasing demand for skilled personnel in all fields of freight transport and logistics.

Description of the measure

Holding regular summits with the participation of the Federal Government, operators, associations and unions will help the stakeholders to reach agreement on the situation concerning recruiting, further training and working conditions. The summits are to be used to kick-start and monitor the activities of the further training initiative (cf. parallel measure) and to record and discuss the progress and results achieved. Subsequently, concrete agreements are to be reached on how to further improve the situation and to push forward the initiative's integration into the skills initiative for Germany. At the same time, the working conditions in the freight transport and logistics sector are to be addressed in order to unlock potential for improvement.

Impact

By quickly relieving the shortage of personnel and raising the skills level, we will lay the foundations for good working conditions and good training in the freight transport industry. Quantification of the additional workers to be recruited through the Masterplan, and of those with superior skills levels, is to take place as the training initiative progresses.

Responsibility

The summits are to be facilitated by the Federal Government, with the Federal Ministry of Transport, Building and Urban Affairs, Federal Ministry of Labour and Social Affairs, Federal Ministry of Education and Research and Federal Ministry of Economics and Technology cooperating closely. The events are to be staged jointly with the industry.

Budgetary relevance

This measure will be funded from the Federal Ministry of Transport, Building and Urban Affairs' budget.

EU relevance

In the Commission's Freight Transport Logistics Action Plan, the subject of personnel and training is dealt with under the heading "Sustainable Quality and Efficiency". In concrete terms, the Commission intends to work together with European social partners and stakeholders on the mutual recognition of training certificates and to launch a dialogue to find ways of improving the attractiveness of freight transport logistics occupations.

Implementation period

Implementation of the measure is due to start in 2008.

F4 Launch a lighthouse project to improve the international profile of logistics courses in higher education

Current situation

The German system for the training of management executives in the field of freight transport and logistics is of a high standard, but at present it tends to play a subordinate role internationally. The multiplicity of players and the competition between institutes create link-up and coordination problems, which result in a lack of recognition. It is therefore difficult to present a positive image of the top jobs in the freight transport and logistics sector, to achieve international recognition of the German training courses for logistics managers and to disseminate and implement the high standards of the German freight transport and logistics sector internationally.

The marketing of Germany as a centre for logistics in a globalized world, in which logistics functions will be of ever greater importance, depends heavily on the quality and recognition of German expertise in the logistics sector. This requires an intensification of the efforts to improve the international profile of the training of management executives by conducting a lighthouse project.

Description of the measure

The aim is to create an internationally recognized course of study for the basic and further training of national and international management executives in the freight transport and logistics sector. This will involve the creation of a “lighthouse course of study” by pooling the initiatives of the major players who provide training in the field of logistics (linking up the principal training structures that operate in the field of logistics), with the participation of the industry. The establishment of an internationally recognized course of study presupposes the creation of a network comprising globally operating enterprises and leading re-

search institutions and the national link-up of institutions of higher education. The course of study is to establish benchmarks and set examples of good practice. Internationally recognized examples are to be taken into account.

Impact

If highly qualified management executives trained to German standards operate at the international level as well, this will enhance the competitiveness of Germany as a centre for logistics and make it more attractive as a place to do business. In addition, the course of study will make it possible to better link up the higher education landscape in Germany and might – even while it is still at the drawing-board stage – create the necessary transparency, drive forward an exchange of experience, launch collaborative schemes and have a positive impact on the way in which the training courses at institutions of higher education are fleshed out.

Responsibility

Institutions of higher education, the industry, the federal states and the Federal Government (Federal Ministry of Transport, Building and Urban Affairs) as facilitator are responsible for this measure.

Budgetary relevance

Implementation of this measure will have a neutral impact on the budget.

EU relevance

It is not believed that this measure has any EU relevance.

Implementation period

The blueprint will be drawn up by the end of 2008. The course will start as of the winter semester of 2009.

F5 Monitor the working conditions in the freight transport and logistics sector as part of the market observation activities of the Federal Office for Goods Transport

Current situation

Today, freight transport and logistics are among the major economic factors for Germany. The people in this sector are one of the key factors determining its continuing successful development. At present, this sector has a workforce of around 2.6 million, who generate more than € 180 billion a year. Operators are finding it increasingly difficult to recruit sufficient numbers of skilled personnel. One of the reasons for this could be that the working conditions are generally considered to be unattractive (weekend work, shift work, heavy physical work, low pay, etc.).

Description of the measure

As part of the market observation activities conducted by the Federal Office for Goods Transport, this measure is designed to facilitate an annual evaluation of the working conditions in the freight transport and logistics sector. It is to provide the social partners with a robust evidence base for their discussions of working conditions. It is not to involve any additional reporting requirements for operators.

Impact

Better and continually updated evidence on working conditions in the freight transport and logistics sector.

Responsibility

The Federal Office for Goods Transport is responsible.

Budgetary relevance

Funding for the measure will be provided from the Federal Office for Goods Transport's budget.

EU relevance

It is not believed that this measure has any EU relevance.

Implementation period

This measure is to be implemented starting in 2008.

F6 Improve seafarers' working and living conditions

Current situation

The 2006 Maritime Labour Convention of the International Labour Organization (ILO) contains rules governing seafarers' working and living conditions. The Convention cannot come into force until it has been ratified by at least 30 states parties to the ILO which have at least 33 % of the world gross tonnage of ships. The Convention will thus establish worldwide standards. The European Commission has called on EU Member States to ratify the Convention by 2012. There is the risk of numerous ships being transferred to foreign registers if Germany has not ratified the Convention when it comes into force.

Description of the measure

The process of ratifying the Convention is to be progressed. In addition, transposition into national law will be taken as an opportunity to create a new maritime labour code and to modernize national maritime labour legislation. Overall, a contribution will be made to the worldwide improvement of seafarers' working and living conditions and to an improvement of safety in international maritime shipping.

Impact

The Convention will improve seafarers' living and working conditions. In addition, it will create a level playing field, thereby optimizing German shipowners' opportunities for making long-term profits.

Responsibility

The Federal Ministry of Labour and Social Affairs has lead responsibility for implementing the measures, which will also be closely monitored by the Federal Ministry of Transport, Building and Urban Affairs.

Budgetary relevance

Implementation of this measure will have a neutral impact on the budget.

EU relevance

Ratification is required for implementation of this measure.

Implementation period

Ratification and implementation will be sought by 2009.

G Further measures to make Germany even more attractive as a centre for logistics



G 1 Establish a freight transport and logistics network**Current situation**

The EU is playing an increasingly important role in developing the framework for freight transport and logistics. If German interests are to be effectively articulated, the players require timely information on forthcoming projects. Closer coordination between the Federal Government, the industry and trade associations can make it possible for the stakeholders to adopt a position quickly and thus exert influence on European decisions at an early stage.

Description of the measure

Establishment of a permanent network with fixed focal points in the Federal Government, federal states, trade associations, unions and, if appropriate, the industry, to ensure that German interests inform the EU's decision making processes earlier and more effectively.

Impact

The aim is to ensure that German interests are better reflected.

Responsibility

The Federal Ministry of Transport, Building and Urban Affairs, the industry, trade associations and federal states are responsible for implementing this measure.

Budgetary relevance

This measure will be funded from the Federal Ministry of Transport, Building and Urban Affairs' budget.

EU relevance

This measure is to facilitate more effective cooperation with the EU.

Implementation period

This measure is to be implemented by the end of 2008.

G 2 Implement a marketing strategy to promote Germany as a centre for logistics**Current situation**

Germany is a high-technology location. As such, it is becoming increasingly dependent, within the framework of an international division of labour, on imported inputs, whose processing and final assembly in Germany creates jobs and safeguards the competitiveness of German companies. Against this background, there are opportunities for more economic growth and employment. If we wish to seize these opportunities, it is absolutely essential that we have an efficient and internationally competitive freight transport and logistics system. As a first-class logistics centre in Europe, Germany is well equipped in this sphere. However, the way it is perceived on international markets is inadequate. For this reason, Germany as a logistics centre will be marketed in an effective and targeted manner, and these efforts will be coordinated with the Federal Government's activities to promote foreign trade and investment.

Description of the measure

A marketing strategy to promote Germany as a centre for logistics is to be implemented in order to better highlight internationally the potential and qualities of Germany as a logistics centre. This will complement the marketing activities of the federal states to make regional logistics centres more attractive. The strategy contains the following approaches:

- Trade fairs and congresses: Presentations are to be given and customers targeted, for instance by means of trade fair stands and accompanying events such as the German Logistics Day.
- Trips by delegations/entrepreneurs: Targeted logistics presentations are to be given and business receptions and corporate meetings held, among other things.
- Networking events: Discussion of the

marketing activities and measures in the respective target markets, training of "sales partners" within the framework of appropriate activities. Workshops are to be held and strategic partnerships with states and institutions initiated.

Implementation of the strategy will be coordinated with the Federal Ministry of Economics and Technology, the Federal Foreign Office and its missions abroad, and the industry. The federal states will also be involved.

Impact

Implementation of the marketing strategy is designed to result in more orders for the German freight transport and logistics industry. This is likely to lead to additional wealth creation and more jobs.

Responsibility

The Federal Ministry of Transport, Building and Urban Affairs and the industry, in consultation with the Federal Ministry of Economics and Technology and the Federal Foreign Office, will be responsible for implementing the marketing strategy.

Budgetary relevance

€ 600,000 is available for 2008 in the Federal Ministry of Transport, Building and Urban Affairs' budget. The industry has indicated that it will provide complementary funding.

EU relevance

This is a measure to make Germany even more attractive as a centre for logistics in international competition.

Implementation period

Implementation of the marketing strategy is due to have started by mid-2008.

G3 Security strategy for the freight transport and logistics industry

Current situation

The attacks of 11 September showed that globalization and the associated international interdependency make freight transport and logistics more vulnerable. Crime and terrorism prevention are therefore important fields in the evolution of freight transport and logistics. In particular, transport chain security and the protection of critical transport infrastructure are becoming increasingly important throughout the world. However, transport, like no other sphere of life, is dependent on smooth flows and delay-free operations. We face the challenge of striking a balance between security and mobility. Security gains, red tape and economic efficiency have to be regularly weighed against one another. In particular, security measures are not to result in competitive disadvantages vis-à-vis foreign service providers or in one mode of transport being placed at a disadvantage compared with the others.

Description of the measure

The aim is to evolve the security strategy, taking account of the following aspects, which are of great importance to the freight transport and logistics industry:

- In order not to place a burden on operators in the form of unreasonable measures, information on the existing security regimes will be gathered, reviewed and assessed.
- This stock-taking exercise will be followed by a comparative study of the various security levels. This is designed to identify the “weakest links” in the supply chains, in order to derive necessary and targeted security measures. It is important that an impact assessment be carried out. Those tasks for which the industry itself is to be responsible should also be determined.
- The network comprising the public authorities, industry, trade associations

and academia will be continued and expanded.

- The Federal Government will continue its civil security research programme, which was launched in 2007. One of the priorities is to be research into logistics chain security.
- If recognized standards are to be created in the field of civil security, clearly defined international coordination is required.

Impact

This measure is designed to help enhance the security of the supply chains and thus also of the people employed in the freight transport industry.

Responsibility

The Federal Ministry of Transport, Building and Urban Affairs, Federal Ministry of Education and Research, Federal Ministry of the Interior, trade associations and operators are responsible for implementing this measure.

Budgetary relevance

This measure will be funded from the Federal Ministry of Transport, Building and Urban Affairs’ budget, except in those cases where the security research programme is affected (funded from the Federal Ministry of Education and Research’s budget).

EU relevance

This measure is consistent with EU transport policy.

Implementation period

Work on implementing this measure is to start immediately.

Glossary of abbreviations

ARA ports	Ports of the North Sea coastal cities of Amsterdam, Rotterdam and Antwerp
CO ₂	Carbon dioxide
DB AG	Deutsche Bahn Aktiengesellschaft (German Railways)
DG TREN	European Commission Directorate-General for Energy and Transport
EC	European Community
EMAS	Eco-Management and Audit Scheme
ESP	Electronic stability programme for motor vehicles
ETCS	European Train Control System
EU	European Union
EU-27	The European Union in its current composition, with 27 Member States
HGV	Heavy goods vehicle
ICAO	International Civil Aviation Organization
ILO	International Labour Organization
ISO	International Organization for Standardization
ITS	Intelligent transport systems
km	Kilometre
kWh	Kilowatt-hour
PPP	Public private partnership
SPC	ShortSeaShipping Inland Waterway Promotion Center
t	Tonne
TEN	Trans-European network
tkm	Tonne-kilometre

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