



**Economic and Social
Council**

Distr.
GENERAL

TRANS/WP.5/2002/1/Add.9
19 June 2002

Original: ENGLISH

ECONOMIC COMMISSION FOR EUROPE

INLAND TRANSPORT COMMITTEE

Working Party on Transport Trends and Economics
(Fifteenth session, 2- 4 September 2002,
agenda item 5)

REPLIES TO THE QUESTIONNAIRE ON TRANSPORT DEVELOPMENT

Addendum 9

Transmitted by the Government of Germany

Note: At its fifty-ninth session the Inland Transport Committee, following an earlier decision taken at its fortieth session (ECE/TRANS/42, para. 45), agreed to circulate the questionnaire on the most significant criteria for the determination of new and important developments with regard to inland transport in the member countries of general interest to Governments (ECE/TRANS/119, para. 52).

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Major Trends in German Transport Policy

I. Investment policy

II. The basis of investments in the transport sector is the 1992 Federal Transport Infrastructure Plan for the period 1991 to 2012, which (at the price level of 1998) provides for an investment volume of around € 251 billion for upgrading and new construction projects as well as for preserving the fabric of and renewing the federal rail, trunk road and waterway networks.

Within the period from 1991 to 2001 around € 127 billion of federal funds were invested in Germany, that is to say about half of the investment volume provided for in the Federal Transport Infrastructure Plan. With around € 50 billion – or around 40% of the investment volume - the new federal states have received an over-proportional share of these funds.

Despite the necessary budgetary consolidation, investment in upgrading the transport infrastructure is continuing at a high level. Up to the year 2003, an amount of around € 11.5 billion per annum and effective from the year 2004 an amount of around € 9.8 billion per annum will be appropriated for this purpose from federal funds.

Special priority is given to the 17 German Unity transport projects (VDE) with a total investment volume of around € 35 billion. Construction work is under way on all German Unity transport projects and, by the end of 2001 more than € 19 billion had been invested in them; around 55% of these funds was invested in nine railway projects. More than half of the planned investment volume for the rail projects has already been realized, of which six routes have already been commissioned, following upgrading, new construction and electrification. In the case of VDE road projects around 1,150 km of six-lane motorways were constructed or upgraded by the end of 2001, and a little less than 400 km are under construction. Except for two small sections, the motorway A 2 from Hanover to Berlin was opened to traffic in 1999, and the motorway A 14 from Halle to Magdeburg was completed as the first new construction project of the VDE road projects at the beginning of 2000. In addition, large sections of the A 4 from Eisenach to Görlitz and of the A 9 from Berlin to Nuremberg have been opened to traffic.

III. Regulatory policy

It is based on an integrated transport concept which has the goal of optimizing the interconnection of all modes of transport. Important elements of regulatory policy are, therefore, the interconnection of transport infrastructure and modes of transport, shifting of traffic, the avoidance of unnecessary traffic, as well as reasonable traffic management and control.

The mode of rail transport will be able to handle a larger share of growing transport again in the future. To this end, investments in railway infrastructure maintenance, upgrading and new construction are considerably increased. More transport by rail, however, also presupposes the promotion of intermodal competition. Organizational measures are to guarantee the separation of network and operation, and the establishment of an independent route agency is to ensure a non-discriminatory route pricing and allocation system. The supervision of competition in rail transport is to be strengthened by statutory rules.

The national Federal Transport Infrastructure Plan is being revised and is to take the optimization of interfaces between transport modes to a larger extent into consideration. This is to provide important preconditions for an integrated overall transport system in which each transport mode can make better use of the specific advantages of its system. The railways, roads, waterways, as well as coastal and maritime shipping are to be better integrated into the transport chains, and the transfer from one mode of transport to another is to be facilitated and combined transport is to be strengthened.

With the introduction of a distance-related motorway user charge for heavy lorries, a systems change from budget financing to financing by users is to begin effective from 2003 to contribute to a fairer allocation of infrastructure costs. The major share of these revenues is to be reinvested in the infrastructure of all modes of transport, especially according to regulatory policy aspects, via a financing company.

III. Telematics in transport

Modern communications, guidance and information systems make possible the increasingly widespread application of telematics systems and services. This provides lasting support to the regulatory and investment policy of the Federal Government in its efforts to achieve its transport policy objectives. The Federal Government expects that the increased use of telematics systems and the more widespread application of telematics services will make contributions to improving the transport system as a whole.

In both the political and industrial sectors, there is agreement that, unless there is direct responsibility by the State, the planning, organization and operation of telematics applications are primarily tasks to be performed by the private sector. Competition should decide which telematics applications and services prevail on the market. The main responsibility of the public sector will be to provide support to the process of introduction. First and foremost, it is a question of creating the framework required for telematics services, i.e. for the technical, organizational and legal shape that these services are to take. Cooperation between the public and private sectors (public-private partnerships) has a major role to play here, for instance in the development of common traffic data management, the use of public transport infrastructure by third parties (licence agreements), and the transmission of automated and thus up-to-the-minute traffic messages by RDS/TMC (Radio Data System/Traffic Message Channel).

One of the major tasks of the European Community in the field of telematics is to promote interoperable applications and services by creating the necessary framework. This was emphasized once again by a resolution adopted by the Council of Transport Ministers in March 1997. To assist the introduction of road transport telematics in Europe, the Commission has presented a plan of action which gives high priority at the EU level to the following topics: RDS/TMC, automatic fee collection, traffic data management, issues relating to the safe and ergonomic design of in-vehicle information and communications equipment, and the creation of a European system architecture.

In addition to improving the existing satellite signals, the European Space Agency (ESA) has launched an application-related research programme (GalileoSat) to develop an independent civil satellite navigation system. This action was preceded by a decision taken by the Council of the European Union on 26 March 2002 to develop such a system (Galileo).

The manufacture of telematics systems and operation of telematics services will open up a lucrative common market for European industry. In the field of road telematics alone, recent forecasts predict a turnover volume of DM 80 billion in Europe between now and 2010. Thus, the expected economic contribution through the use of transport telematics is somewhat lower than in earlier, initial rough estimates. Nevertheless, even this order of magnitude, which is closer to reality, will, via future transport telematics applications and services, give an important stimulus to securing and creating jobs. The promotion of the broad-based introduction of transport telematics is thus also part of industrial policy.

Selected Economic Data

Issue	Unit							Source:
Expected economic growth Germany	%				2002 0.75			Federal Ministry of Finance Annual economic report 2002
Development of consumer prices	%				1.50			
Employment market		1999 ¹⁾	2000 ¹⁾	2001 ¹⁾	Feb-02	Changes 1999/2001 resp. 2002		Federal Labour Office
						abs.	%	
Number of unemployed	thousand	4099.2	3888.7	3851.6	4296.2	197	4.8	
Unemployment rate	%	11.3	10.5	10.4	10.4			
Short-time workers	thousand	118.6	86.1	122.9	246.4	127.8	107.8	
Vacant jobs	thousand	456.3	514	506.1	486.5	30.2	6.6	
¹⁾ Annual average								
New orders		1999	2000	Oct-01				Federal Statistical Office
Manufacturing sector	1995=100	113.9	129.0	125.4		11.5	10.1	
- at home	1995=100	103.2	11.2	108.3		5.1	4.9	
- abroad	1995=100	133.1	161.1	156.2		23.1	17.4	
Manufacturers of intermediate products	1995=100	106.9	121.4	116.9		10	9.4	
- at home	1995=100	100.4	109.8	106.8		6.4	6.4	
- abroad	1995=100	120.4	145.3	137.5		17.1	14.2	
Manufacturers of capital goods	1995=100	124.0	144.2	137.9		13.9	11.2	
- at home	1995=100	109.5	119.4	113.1		3.6	3.3	
- abroad	1995=100	143.3	178.1	171.6		28.3	19.7	
Manufacturers of consumer durables	1995=100	99.5	106.4	115.3		15.8	15.9	
- at home	1995=100	96.1	99.0	107.2		11.1	11.6	
- abroad	1995=100	109.1	126.1	138.9		29.8	27.3	
Manufacturers of consumer goods	1995=100	102.7	104.6	110.7		8	7.8	
- at home	1995=100	96.1	94.8	97.6		1.5	1.6	
- abroad	1995=100	123.8	135.3	151.9		28.1	22.7	

Issue	Unit							Source:
Production in the producing sector		1999	2000	Oct. 01		Changes 1999/2001 resp. 2002		Federal Statistical Office
						abs.	%	
Producing sector ²⁾	1995=100	108.3	113.5	119.9		11.6	10.7	
- manufacturers of intermediate products	1995=100	111.3	117.0	123.0		11.7	10.5	
Manufacturers of capital goods	1995=100	118.8	131.0	138.8		20	16.8	
Manufacturers of consumer durables	1995=100	101.8	105.7	114.6		12.8	12.6	
Manufacturers of consumer goods ²⁾ incl.construction industry	1995=100	104.4	105.8	112.2		7.8	7.5	
Motor industry		1999	2000	2001				VDA (Association of German motor vehicle manufacturers)
Production	1000	5277.6	5256.6	5691.7		414.1	7.8	
Number of new registrations	1000	3808.4	3693.2	3638.3		-170.1	-4.5	
Export	1000	3375.0	3745.1	3915.8		540.8	16.0	
Balance of payment		1999	2000	2001				Deutsche Bundesbank (German Central Bank)
Current account deficit	Mio. €	-18261.0	-59865.0	2805.0		21066	-115.4	
incl.surplus/deficit of trade account	Mio. €	75633.0	35576.0	9278.0		-66355	-87.7	

Issue	Unit						Changes		Source:
		1999	2000	2001	1999/2001 resp. 2002	in %			
Transport performance in goods and passenger transport according to new break-down								Prognos AG	
Goods transport		1999	2000	2001					
Road haulage	billion tkm	341.7	346.3	353.3		abs.	in %		
- national lorries	billion tkm	249.4	250.6	252.9		11.6	3.4		
- local road haulage	billion tkm	31.7	29.8	27.3		3.5	1.4		
- regional road haulage	billion tkm	49.1	43.3	48.6		-4.4	-13.9		
- long-distance road haulage	billion tkm	165.5	171.5	177.0		-0.5	-1.0		
- foreign lorries (info: cabotage transport)	billion tkm	92.3	95.7	99.9		11.5	6.9		
Railways	billion tkm	71.4	76.0	75.2		7.6	8.2		
Inland water vessels	billion tkm	62.0	66.5	64.2		1.4	42.4		
Pipelines	billion tkm	15.0	15.0	15.8		3.8	5.3		
all modes of land transport	billion tkm	490.7	503.8	508.5		2.2	3.5		
Passenger transport		1999	2000	2001		0.8	5.3		
Private transport	billion pkm	762.0	740.0	728.0		17.8	3.6		
Public transport	billion pkm	150.0	153.0	155.0		-34	-4.5		
- road transport	billion pkm	76.0	78.0	79.0		5	3.3		
- regular transport services	billion pkm	51.0	52.0	53.0		3	3.9		
- occasional transport	billion pkm	25.0	26.0	26.0		2	3.9		
- which rail transport	billion pkm	74.0	75.0	76.0		1	4.0		
- local transport	billion pkm	39.0	39.0	40.0		2	2.7		
- long-distance transport	billion pkm	35.0	36.0	36.0		1	2.6		
Local public transport	billion pkm	90.0	91.0	93.0		1	2.9		
Public long-distance transport	billion pkm	59.0	62.0	62.0		3	3.3		
all modes of land transport	billion pkm	911.0	893.0	880.0		3	5.1		
						-31	-3.4		

Issue	Unit							Source:	
Air transport volume		1999	2000	2001			Changes 1999/2001 resp. 2002		Prognos AG
Domestic traffic	million persons	20.3	21.5	20.8			abs.	in %	
International traffic	million persons	92.4	99.9	96.0			3.6	3.9	
all traffic relations	million persons	112.7	120.4	116.9			4.2	3.7	