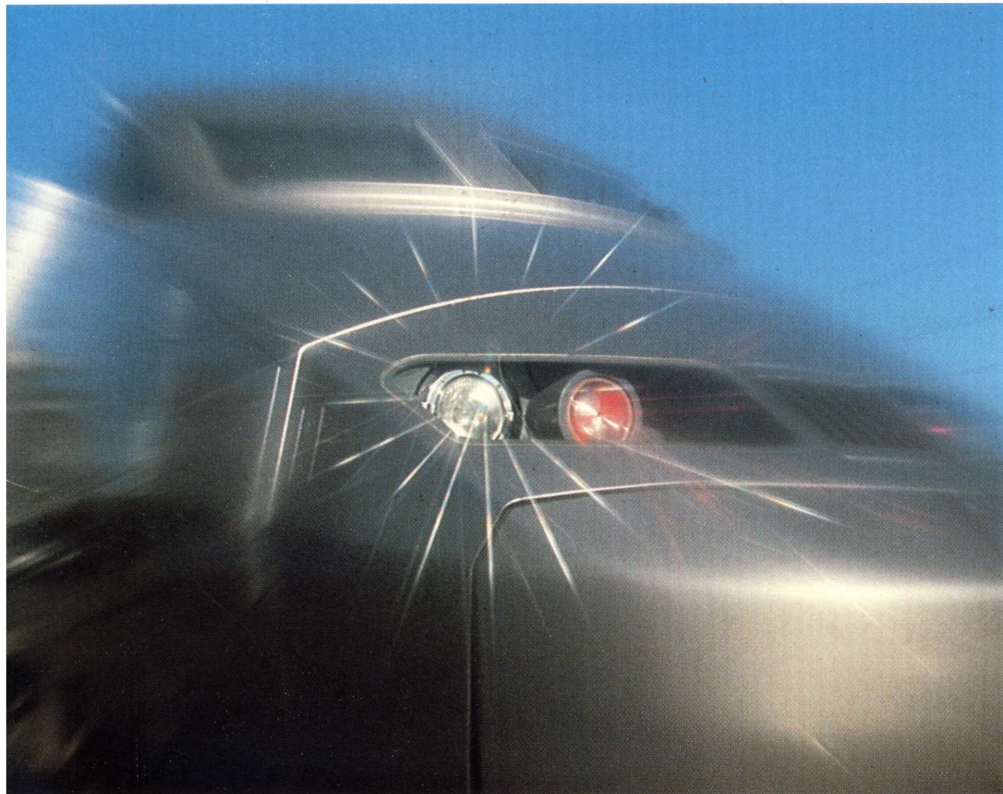
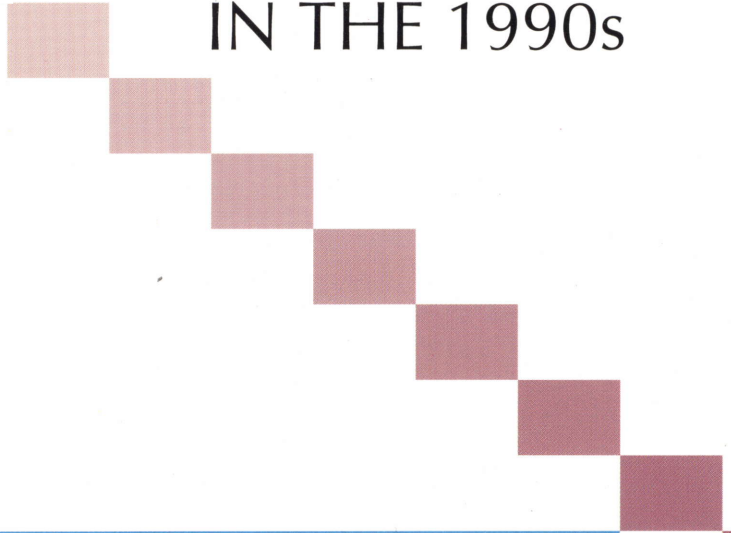


TRANSPORT IN THE 1990s



Europe
on the move



PIU/A.B.

The transport sector makes a vital contribution to the European Community's frontier-free single market. Without efficient transport networks, two of the European Community's basic principles – the free movement of goods and of people – would not function. In preparation for the single market, the Community has adopted a series of laws liberalizing the main modes of transport: road, rail, air, sea and inland waterway.

More progress has been made in creating an integrated EC transport policy in the past five years than in the previous 30. Community legislation now exists for all modes of transport, creating new open-market conditions. The benefits for Community companies and citizens have been immediate. The Community supports major projects like the EC's high-speed train system, the Channel tunnel, the modernization of Europe's air-traffic control. But more remains to be done both in terms of abolishing residual national restrictions and of integrating national networks across Europe. These need to be re-drawn and upgraded to single trans-European networks. Other priorities for action concern congestion, safety and environmental problems, the unequal utilization of different modes of transport and transport links to the EC's neighbours in the EFTA countries as well as in Central and Eastern Europe.

In response to these challenges, the European Commission has defined a global approach to achieve what it calls 'sustainable mobility'.

TRANSPORT AND THE SINGLE MARKET

The transport sector makes a singular contribution to the well-being of the European Community and its citizens. It ensures the distribution of goods throughout the single market from manufacturer or producer to end-user. It enables people to use their new freedom to move around for professional or for private reasons. Transport gives concrete expression to the abstract concept of the single market.

Since then, all modes of transport have been forced to loosen, if not eliminate, national restrictions against operators from other EC countries. The result has been the creation of a more open European market, free from much red tape and quota restrictions. But some limitations remain.

Road transport:

Frontier checks on goods crossing from one Member State to another were abolished on 1 January 1993. Quota restrictions on non-national firms were lifted. The transport of loads inside another Member State, known as internal 'cabotage', is still limited.

Air transport:

Price controls on air fares have been eliminated. So have revenue-sharing agreements between national airlines operating a particular route. Consecutive cabotage is allowed. This means, for instance, that a German airline can carry passengers between two French cities provided they join a flight originating outside France. Full cabotage will be possible from 1997. Several carriers can operate on the same route.

Rail transport:

The Community has adopted legislation allowing international groups to use the rail infrastructure in Member States to operate international services. This applies particularly to operators of combined transport systems (road/rail or sea/rail).



Dornier/Jourdain

Transport has increased by over 50% in the past 20 years, largely as a result of the expansion of road traffic. We are nearing saturation point and measures are urgently needed to avert a crisis.

In its own right, transportation is also one of the most important economic activities in the EC accounting for 7% of its gross domestic product (GDP) and directly employing 5.6 million people in the 12 Member States. Its overall economic impact is even greater when one considers that the manufacture of transport equipment gives jobs to another 2.5 million people.

The importance of an integrated transport structure was recognized by the authors of the Community's founding Treaty of Rome. They set a common transport policy as one of the Community's priority tasks. But progress was slow until 1985 when the Community began to prepare for the single market.

Transport and the environment

Transport is a major contributor to pollution in the world today. The different forms of transport are the main source of nitrogen dioxide (NO₂) and carbon monoxide (CO), which are major pollutants of the urban environment, and are responsible for a quarter of all emissions of carbon dioxide (CO₂), one of the greenhouse gases.

The adverse effects of pollution on human health and the state of buildings are most acute in urban areas where most people live. These are also the areas most seriously affected by noise and vibrations.

In conjunction with the Member States, the Community intends to develop a global strategy aimed at maintaining mobility while preserving the environment. Obviously, it is for regional and, above all, local government to introduce measures which are effective and command popular support.

Foremost among these will be the introduction of vehicles producing fewer or no emissions and the development of rapid, comfortable public transport. The implementation of such policies calls for political will, popular support and substantial investment.

Sea transport:

National quota restrictions have been removed. Cabotage has become possible with exceptions on shipping services to islands until 1999. Restrictions apply to shipping services within Greece until 2004.

Inland waterways:

Controls at inland EC frontiers were removed on 1 January 1993. Cabotage became possible from that date.

CHANGING PRIORITIES

Transport is a growth industry. In the past 20 years it has expanded in line with the growth of the EC economy. The main growth factors are:

- changes in the structure of manufacturing industry with shifts in production locations away from urban areas to new industrial sites. Economic integration within the EC has speeded up the dispersal process;
- changes in production methods, leading to stock reduction and a requirement for more flexible, varied and rapid delivery systems (known as just-in-time systems). Shipment sizes are reduced but deliveries become more frequent;
- the growing importance of the services sector and its multi-site business activities has encouraged rapid growth in professional mobility;
- the rise in personal incomes and changing demographic patterns have led to a higher degree of car ownership and increased leisure and holiday travel.



Air traffic accounts for only 6% of travel, but has had the highest rate of growth of any form of transport in recent years.

But the growth over the past 20 years has been borne unevenly by the different transport modes. Freight transport has gone up by 50% during this time, with road transport accounting for the bulk of the increase. It now accounts for 70% of all goods transport. Railways carry only 19% and inland waterways 9%.

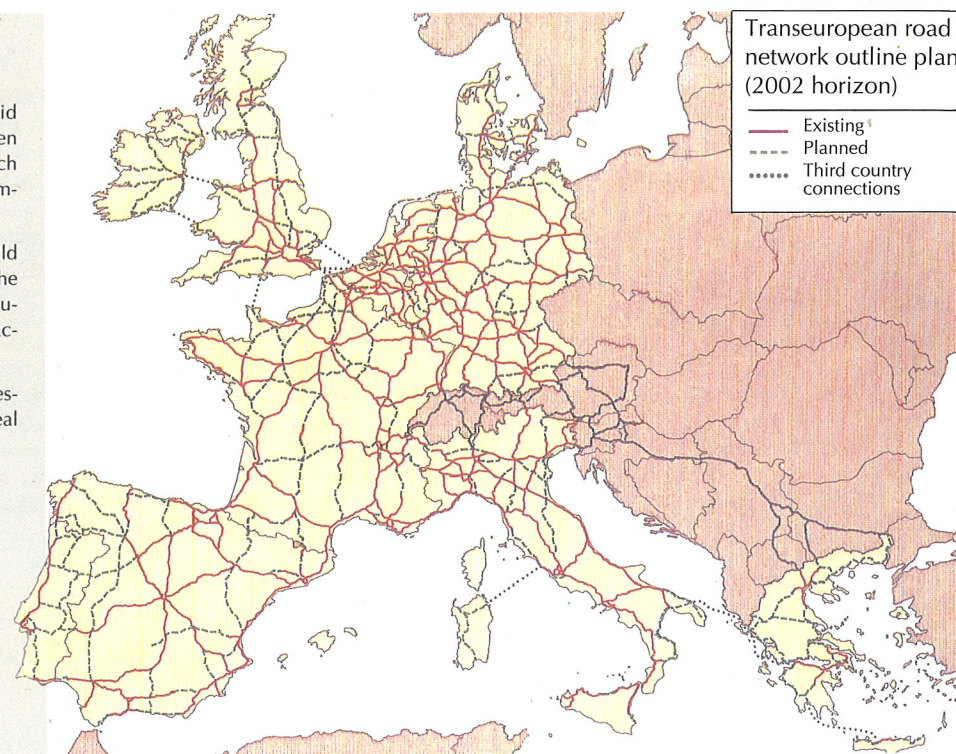
Passenger traffic has nearly doubled in volume since 1970, with most of the increase attributable to the use of private cars. As measured in passenger kilometres, they now account for 79% of all journeys compared with 9% for buses, 7% for rail and 6% for aircraft, although the volume of passenger air traffic quadrupled in the past 20 years.

Planned trans-European road network (year 2002)

Motorways already in operation are represented by solid lines, planned motorways by dotted lines. The plan has been drawn up by the European Commission; it will be up to each Member State to decide the exact routes and the pace of implementation.

The prime aim is to connect national networks and to build the necessary motorway links, many of which will be in the outlying regions of the Community: in Ireland, Greece, Portugal and Spain. The networks in these countries currently account for only 20% of the Community total.

Another important objective, however, is to relieve congestion on the roads. Road users must be made to meet the real traffic costs, for example, by wider application of tolls.



COPING WITH THE CHALLENGE

The uneven growth in the utilization of the different transport modes creates problems. Road transport systems are congested or near saturation levels in some regions of the Community. This in turn contributes to environmental problems.

In the transport sector, 80% of the CO₂ emissions which contribute to global warming, come from road transport. Air travel accounts for 11%, railways for 4% and inland waterways for less than 1%. It is the less polluting modes of transport that are underutilized.

There is also congestion in air transport. Although air space is not at saturation level, the existence of 12 different systems of air-traffic management and control in the Community leads to flight delays. The problem is worsened by the fact that there is a lack of runway or terminal capacity at some EC airports.

Investments in different modes of transport has been uneven too. Two-thirds have gone on road transport although this has scarcely helped the infrastructure cope with growing volumes of traffic.

One important reason why road transport has developed at the expense of other modes is because road users have not been confronted with the full cost of their activities. As prices do not reflect the full costs, demand has been artificially high.

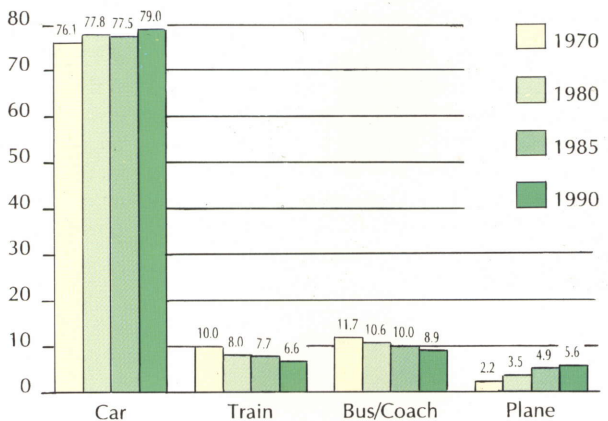


Louage

At the moment most of the cars transported by train are brand new, but one of the objectives of European transport policy is to develop combined road-rail transport, i.e. loading lorries and cars on to trains on particularly scenic stretches of the route. This form of transport saves energy, reduces carbon dioxide emissions and spares the environment, while allowing drivers to enjoy the use of their cars at their destination. Only 4% of freight is currently carried by combined road-rail transport in the Community.

If appropriate pricing and infrastructure policies were to be applied, the imbalance between modes and the resulting inefficiencies would disappear. The planned Community-wide road tax to charge for the use of motorways by trucks would go part of the way to bring prices more in line with costs. The attractiveness of road transport over other modes would diminish.

Passenger transport in the European Community 1970-90 (%)



TOWARDS SUSTAINABLE MOBILITY

The aim of EC transport policy in the 1990s, set out in a landmark White Paper published by the European Commission at the end of 1992, is to achieve a double integration:

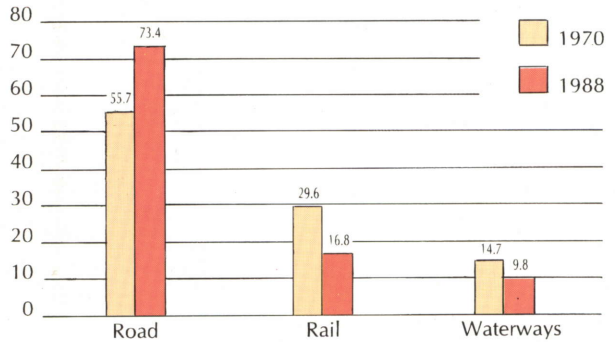
- the integration of modes of transport so that they form integrated systems, combining the use of different modes, where appropriate, on the same journey;
- the integration of national transport networks into a coherent European network structure.

In addition, the White Paper lays down several social priorities. These concern access to the profession and job training, employment protection and the improvement of living and working conditions.

On present forecasts, transport volumes will rise about 30% by the year 2000. In addition, new transport links will be required between the Community and its neighbours in the European Free Trade Association (EFTA) as well as in Central and Eastern Europe. Without the realignment of costs and other concrete steps to rebalance capacity among different modes, the ensuing congestion would undermine the single market.

The Community and the Member States are already taking action. High-speed train services will shift some passenger traffic from road and air to railways. High-speed freight services are another priority. The Channel tunnel will, for instance, facilitate freight as well as passenger traffic between Britain and the rest of the EC.

Sharp increase in road transport Market shares 1970 and 1988 (%)



The development of combined and 'intermodal' transport is another priority. Each mode will be developed and improved so that it meshes better with other modes.

At present, combined road/rail carries only 4% of the total goods transported. Combined transport will target trunk routes which are already near saturation point or where environmental problems occur. Transit across the Alps between the north and south of the Community is one such route. North-south and east-west waterways, like the new link between the Rhine and Danube rivers, also offer new possibilities.

Combined transport can also include inland waterways and even coastal shipping. The basic idea is to use non-polluting and energy-efficient modes for the main part of journeys wherever possible. In this way, a coherent intermodal policy would be developed using the most appropriate mode or combination of road, rail and waterways, and taking account of cost and efficiency as well as environmental and safety considerations.

It is up to the local and regional authorities to encourage people to use public transport. This will help not only to cut pollution and reduce accidents but also to restore some of the charm to the cities.



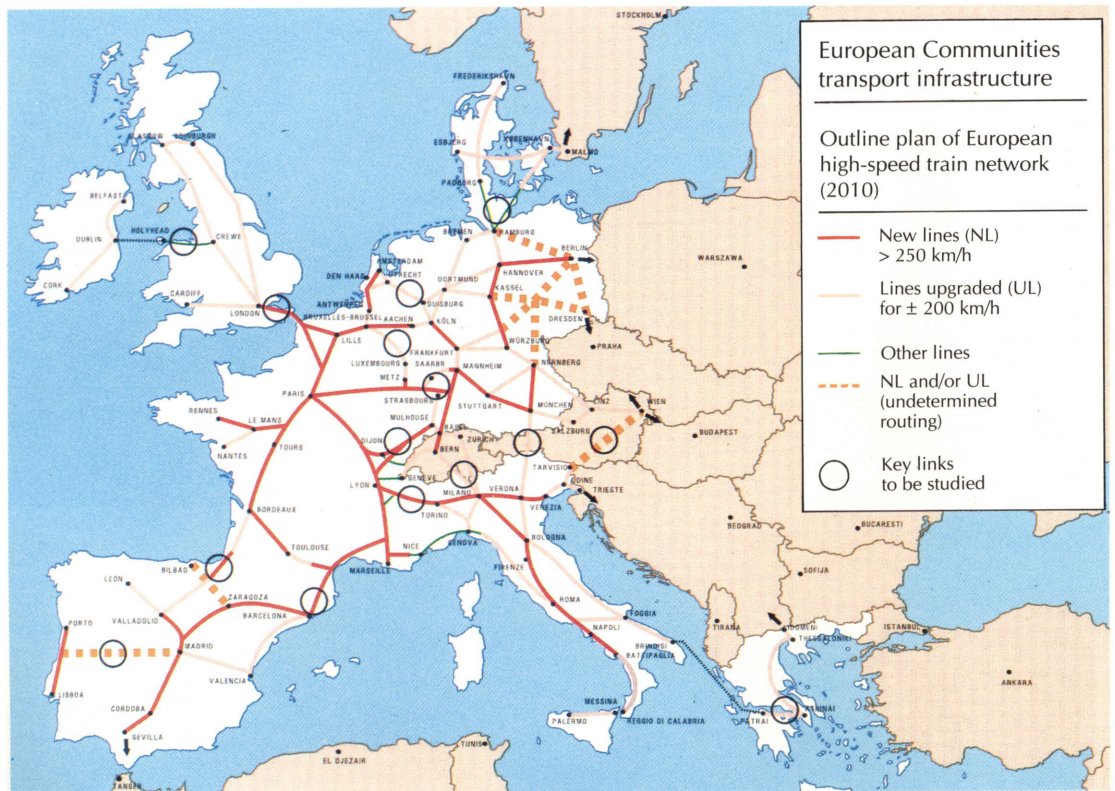
Cornelle

TRANS-EUROPEAN NETWORKS

In parallel with integrating modes, the Community is integrating national networks to create trans-European networks (TENs). This was given priority status in the Maastricht Treaty on European Union.

The aim is to transform the 12 networks into a single network of European dimension. Bottlenecks will have to be removed and missing links created. Remote and outlying regions of the Community will be integrated into the system. So progressively will the EFTA countries and other parts of Europe.

The development of TENs would be underpinned by a series of measures. These would include the better use of existing networks by modernizing equipment and by an improved flow of information between systems by using electronic data interchange (EDI) and telecommunications. There would also be a greater R&D effort, concentrated on interfaces between modes (so-called intermodal transfer points) and on technologies to improve the quality of service.



The Community also supports a diversification of investment sources for transport projects with greater reliance on private capital. The Community will concentrate its financial effort on stimulating projects of Europe-wide interest by helping to integrate regional and national projects and to connect distant regions to the European network.



European railway companies are planning to build 30 000 kilometres of high-speed track over the next 25 years. The revolution in rail travel has already begun, and high-speed trains of many different designs are now in operation.

The fastest train in the world is the TGV-Atlantique 325, which reached a speed of 515.3 kph in trials in May 1990. It achieves an average speed of 300 kph. France plans a network of 4 700 kilometres of high-speed track, 700 kilometres of which have already been completed.

Spain's new high-speed train, the AVE, came into service between Madrid and Seville at Easter 1992.

The German intercity express (ICE), with a top speed of 280 kph, is geared to the needs of the German network. It is currently restricted to a maximum of only 160 kph.

The ETR 500 is cutting journey times in Italy with speeds of 300 kph, while another Italian train, the Pendolino, has a tilting mechanism which makes it particularly suitable for routes with many bends.

British Rail is also developing its new generation of electric trains.

Denmark's IC train, with its distinctive rubber 'nose', runs at 200 kph.

All of these new trains will offer even higher standards of comfort.

There is nothing to stop us from taking to the railways in ever greater numbers.

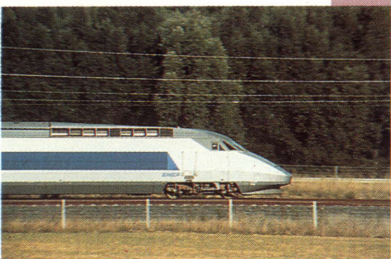



Photo : Frank Pierlings and P. Caudron



EN



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