

TRANSPORT / EUROPE N°1



ÉDITORIAL

A NEW DEPARTURE FOR OPSTE

This introduction is for two audiences that overlap only in part: those readers who are aware of OPSTE and those who are aware of TDIE.

Let's start with the Observatory on Policies and Strategies for Transport in Europe (OPSTE). The use of the terms «policy» and «strategy» suggests a long-term holistic view, involving both public and private actors. Europe brings together countries that each have highly distinctive characteristics, notably in the matter of mobility. The European system is made up of this diversity, which a comparative approach illuminates. Furthermore, comparisons produce a better understanding of each individual case, distinguishing it from the others. Nevertheless, Europe is not just the simple juxtaposition of national arrangements; it also has its own existence, at its own scale. Traffic flows of people and goods cross national boundaries; infrastructure and service networks are organised at the scale of the continent of Europe and even beyond; Union member states have developed over the years a Common Transport Policy (CTP) that creates a framework for national policies. More generally, experiences and ideas circulate across Europe and enrich, at every level, thought and action.

OPSTE was set up in 2001 at the National Transport Council (Conseil national des transports, CNT, a French consultative body combining the social partners, experts and public administrators in the transport

domain), when it was observed that an understanding of transport in France had to take account of its European context. The General Commission for Sustainable Development (Commissariat général au développement durable, CGDD), of the Ministry of Ecological Transition and Solidarity, took over from the CNT when the latter was dissolved in 2010. Now it is TDIE that is taking up the baton to feed into its own linking of national and European levels, matching the widening of its own field of interest.

OPSTE is a small network of independent experts, chosen on the basis of their personal credentials (not as representatives of their respective national administrations), and having a good general understanding of the transport system of the country to which they belong. They meet two or three times a year, either to compare the ways in which a particular issue, chosen beforehand, is treated in different places, or to present key events that have happened nationally and which are of interest from the European perspective.

TDIE was born in 2001, like OPSTE. The association considers that transport is, in essence, a societal issue. It tries to encourage the French government and parliament – and organisations and citizens more widely – to think more long-term about transport policies, beyond the time frame of alternating government majorities. TDIE defines itself as a think tank that is pluralist (co-chaired by long-standing parliamentarians from opposing political families), intermodal (representatives of all the transport modes are members) and territorial (integrating local authorities and paying attention to the practical outcomes of decisions taken). TDIE includes a Research Council so that its proposals are supported by recognised expertise.

The initial theme of TDIE's work was that of infrastructure (its planning, financing, acceptability, etc.), but over the years the topics for discussion and intervention widened to encompass both infrastructure and mobility, both travellers and goods, for the whole set of modes, taking account of their externalities, at all geographic scales.

While leading continuous discussion about the permanent evolution of transport matters, TDIE intervenes too at the high points of the political calendar. At those times it puts forward ideas for discussion and questions the candidates in the presidential, regional, European and municipal elections, publishing their various proposals and organising a public debate, so that the issue of mobility receives the attention it deserves in the political manifestos.

Transport policies involve the public authorities at all institutional levels. They result too from the increasingly strong interaction between national and Community policies. TDIE's approach has therefore widened in the direction of the European Parliament and the European Commission.

The convergence and the complementarity of the work being carried out by OPSTE and TDIE are evident. In concluding this process of association, the experts of OPSTE are to retain their intellectual independence when they treat issues of interest to TDIE's strategy. This Bulletin, Transport / Europe, will diffuse widely the fruits of these discussions and exchanges. To signal both the continuity and the re-launch, the title of the Bulletin does not change, but its numbering restarts at 1.

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TDIE (transport, développement, infrastructure, environnement) is a French think tank that contributes to the debates in France over the broad directions to be taken by public policies for transport, mobility and logistics. As an arena for discussion, TDIE brings together professionals, economic actors and public decision-makers in the transport world to facilitate collective consideration of questions concerning the financing, planning and evaluation of transport, mobility and logistics policies.

TDIE's mission is to illuminate the debates and discussions that feed into strategic public policies on transport, mobility and logistics: on behalf of its members, paying great attention to the directions being taken by public authorities as well as by political groups; and on behalf of public authorities, paying attention to the needs of different territories as well as to the concerns of transport professionals.

The work of TDIE's Research Council is available on-line at: www.tdie.eu

TDIE is an association legally constituted under the Act of 1901.

A SURVEY OF TRANSPORT IN EUROPE

In order to gain an overall view of transport in Europe, the experts of OPSTE proceed, as said earlier, either by comparing the ways in which one particular question is treated in different places (and we can announce straightaway that the next comparative study will concern the ways in which local rail lines are organised in the countries being observed), or by themselves choosing an event or events that would be of interest to observers from other countries. It is this latter exercise that OPSTE selected to recommence its work, on November 22, 2019.

Out of the wide diversity of events presented by OPSTE members, two complementary ideas emerge. On the one hand, the questions on the agenda for the political authorities as well as for business are more or less the same across the different countries. On the other hand, the way in which they are tackled varies considerably from one end of Europe to the other, depending on the institutional framework but also on the economic and social situation as well as on the state of political opinion and on the vigour with which the policies announced are implemented.

The question of the division of responsibilities between institutional levels is relevant on some occasions. While the question is particularly live in countries in which regionalist demands mean central authority is contested, it does require to be revisited periodically everywhere, for example in France in a new Act on Mobility. A sign of the times, that Act substituted the notion of mobility in its title for that of transport and it no longer restricted its content to the national territory (unlike the 1982 Act on Domestic Transport).

Infrastructure is the foundation of transport systems, solidly implanted into the territory. Its construction and maintenance fall mainly within the responsibilities of public authorities. But how should it be enlarged to match up to evolving needs? Should the long-distance networks be extended or should the emphasis be on local links, said to be able to respond better to «everyday» transport? How should its construction and maintenance be financed, by charging for its use? What division should there be between road and rail, a topic eternally disputed, whose acuteness the climate issue has only magnified? The ecological transition will remain a prime factor in mobi-

lity policies, in Europe and in the world, for very many years...

In the various transport markets, how much opening-up to competition should there be, using which procedures and at what speed? Here again, experience in Europe varies, and each state can find useful references when determining its own options.

The role of the car, the dominant travel mode everywhere, is in itself a key problem: does it mean supporting its spread, or moderating its use and dangers, or restricting its space, notably in the centre of built-up areas? How should new sources of energy be supported while reducing their harmful aspects? Even, should the European Union provide itself with an industrial policy to develop an electric car and battery sector, in the face of American and Chinese competition?

Travel practices are evolving and call for a response from the public powers which, in turn, can promote one change or another. The new forms of urban mobility (once termed «soft», now deemed «active»: cycles, scooters and other gyropods) demand a legal framework to be inserted into public space harmoniously. Urban deliveries, individual public transport (licensed private hire vehicles with driver, PHV) give rise to urgent social questions. What are the responsibilities to their workers of electronic platforms, without which the matching of a supply to a demand is unable to be organised? The diversity of answers is not just European, but global.

How should the integration of national territory into international trade, via transport infrastructure and services, be imagined and organised? What coherent European position towards the «Silk Roads» could be adopted?

The survey of recent events in a few European countries opened up all these questions. It suffices to demonstrate all the diversity, complexity and wealth of transport policies and strategies that are being developed in various countries, and being implemented with varying success. OPSTE will continue, with the support of TDIE and in harmony with its work programme, to shed light on these issues using the comparative approach that is required.

IN BELGIUM

The political governance of Belgium is, as everyone knows, complex. The current federal government has not obtained its necessary ratification and can only manage day-to-day issues. This situation does not impact too heavily on the transport system in as much as that is entirely regionalised, with the exceptions of Brussels-Zaventem airport and the railways (which too are divided between one body in charge of infrastructure and another in charge of operations, and relationships between them are moreover not good).

However, negotiations on employment conditions in transport are blocked. The custom is for salaries and pensions to be negotiated first between the social partners, and then validated by the federal government once there is an agreement. Otherwise, if there is discord, a solution is decided at the political level. The social partners were not able to reach agreement on heavy work; the federal government fell in the meantime and therefore cannot resolve the issue. On road transport, the Brussels region would like to introduce a kilometre tax for all vehicles, which the other two regions do not want. The private vehicle stock includes a high proportion of company cars (which in Belgium provide a supplementary remuneration for their owners) with an increasing number of large models (to the point that the Brussels region wants to ban SUVs). The Brussels road network is congested, and pollution very high there. The regional government, of which the Greens are a component, is developing a policy of extending cycle lanes in 30 km/h zones, keeping out polluting vehicles, and using radar speed checks. Conversely, Flanders does not much favour restrictions on car use.

The construction of a second North-South rail tunnel through Brussels, a very costly project, is still under discussion.

On road transport, 60-tonne «Eco-combi» road-trains are now travelling on certain routes. In the country as a whole, electric cars are spreading only slowly.

Waterway transport has been made the subject of substantial programmes in both the Flemish and Walloon regions, including in support of the projected Seine Nord canal. The aim is to allow the use of 6,000-tonne boats, by raising bridges to give 6m air draught, enabling boats with containers piled three high («triple stack») to pass, and by dredging the Escaut at the level of Tournai, etc. Note that Flanders places more stress on the Lys than the Escaut.

In Flanders, the ports of Antwerp and Zeebrugge are negotiating a merger, especially to manage better their landside access, particularly congested at Antwerp. They would be able to specialise more in which traffic they handle and thereby divide up services more effectively in their common hinterland.

On logistics matters, Alibaba has a big development at Liège airport, which is moreover connected to the rail network.

IN SPAIN

Transport in Spain has since 2015 been particularly affected by the country's political situation. Following the second early parliamentary election in 2019 a fragile majority was established, with more urgent dossiers than the reorientation of transport policy, even though changes would seem necessary in this domain. The position can be summed up in a few key points.

The political impasse in Catalonia notably affects the transport system (as seen in autumn 2019 when protest actions blocked Barcelona airport and the border with France, with the political goal of gaining attention from other European countries). As a result, a project in Aragon for a rail crossing of the Pyrenees was revived, as a more stable route to Europe! The initiation of a political dialogue between the Catalan and Spanish governments is opening up the possibility of new ways out of this conflict, unexplored up till now. The most noteworthy innovations are happening in urban areas. Attention is moving more towards the mobility of people rather than of goods, and concerns the appearance of «active» or «new» forms of mobility, the place of cars, and the reduction of pollution.

As elsewhere in Europe, the consequences of the increasing use of cycles and scooters in urban zones are being debated, with calls for regulation (safety, occupation of public space). The phenomenon of private hire vehicles with driver (PHV, of which Uber is the archetype) has led to social conflicts with taxis.

To reduce air pollution, traffic restrictions are being introduced: old vehicles are banned from the centre of Barcelona, in Madrid a zone was closed to external traffic (though Madrid's new municipal council is trying to roll back this measure), while Bilbao has extended its 30 km/h speed limit to the whole city.

«Smart City» technology groups held a conference in Barcelona, at which developments in multiple applications were demonstrated. Mobility surveys can be carried out on a much larger scale and for a much lower cost than before, tracking the movements of mobile phones, but will citizens be worried about the confidentiality of their private life switched on aeroplane mode? The structure of the air transport sector is still changing. Air Europa has just been bought by the IAG group (which already includes British Airways, Iberia, Vueling and Air Lingus) to strengthen the Madrid hub against London, Amsterdam, Frankfurt and Paris, especially for connections with Latin America.

Finally, on infrastructure matters, the high-speed line construction programme is being pursued, but at a less rapid speed. Motorways concessions are coming to their end and will be taken back by the State. As for charging for their use, the Catalan authorities would like to introduce a vignette (for heavy lorries then for all vehicles) while the central government does not want them...

IN FRANCE

In France, a political and social crystallisation can be seen around mobility issues, revealing strong territorial cleavages (between centre and peripheries, and in caricature between scooter and car). The consensus of 2008 on climate change and a low carbon strategy, developed at the time of the «Grenelle for the Environment», is no more.

The announcement of an increase in the carbon tax on motor fuel was the factor that set off the «yellow vest» movement, with occupations of roundabouts in suburban zones for almost a year, and Saturday demonstrations in city centres. Added to that was a campaign that presented as an attack on rural life the reduction of the speed limit to 80 km/h on two-lane roads that lacked a central separation (on which serious accidents are most frequent), and the introduction of speed radars. After several weeks of conflict, the increase in fuel tax was withdrawn and various provisions for increasing low incomes were made.

The announcement of a reform to the whole system for pensions (currently divided between 42 regimes) concerned very particularly the transport professions (SNCF, RATP), whose pension conditions (retirement

age, incomes) are significantly different from other professions. It had social and political consequences that are difficult to evaluate at this moment.

With the Act on Mobility (loi d'orientation des mobilités, LOM, replacing the 1982 Act on Domestic Transport), the government intends to encourage mobility that is «connected, shared and decarbonised», according to the policy being promoted by a Transport Minister given full Cabinet responsibility. This framework law had been prepared by organising a «National Assizes for Sustainable Mobility», of which some meetings were decentralised, bringing together all the policy players to gather demands and proposals. The President of the Republic had announced this approach to reform in a speech on infrastructure policy on 1 July 2017 in Rennes, when inaugurating the Bretagne-Pays-de-la-Loire high-speed line. In this speech he revealed a change in strategic direction, breaking away from the preference that had been given in investment programmes to heavy infrastructure; from now on priority would be given to «everyday transport».

In the words of the Transport Minister, this Act is a «toolbox». She anticipated, notably, the establishment of charters for digital platforms (cars with drivers, bicycle delivery of parcels and takeaway meals, etc.) to toughen their social responsibilities towards the workers they organise, while not however giving the latter the legal status of employees.

The Act sets out in particular the division of powers between the territorial authorities as «authorities for organising mobility» (autorités organisatrices des mobilités, AOM), confirming the role given to the Region-Conurbation duo by the MAPTAM (2014) and NOTRE (2015) Acts. The Transport Minister hopes notably to find ways in which the whole French territory could be covered by an AOM. There should no longer be blank areas left without provision; new responsibilities and resources would be allocated to the public bodies for inter-communal cooperation (établissements publics de coopération intercommunale, EPCI). Under this scenario, transport operators will be obliged to provide detailed information on their services to the territorial authorities to give them the means to play their role as organising authorities.

For the first time there appeared in the Act the principle of multi-annual programming of transport infrastructure investment, with a reference scenario listing the projects planned and their respective level of expenditure. The Steering Council on Infrastructure (Conseil d'orientation des infrastructures, COI), was made permanent and would follow up these matters in liaison with parliament.

The energy transition has motivated the creation of low-emission zones (zones à faible émission, ZFE), restricting the access of polluting vehicles to cities, but the proposal prepared within the framework of the Assizes for Mobility that would have given cities the right to introduce a charge to regulate traffic has been abandoned. A target date of 2040 for ending the sale of combustion-engine vehicles has been decided. It is too soon to judge whether this Act represents a transition or a rupture. It imposes few constraints on the various actors, and it claims to be aiming to update the tools in the Act on Domestic Transport (LOTI), which dates from 1982 and formed the reference framework for relations between public and private actors in transport. However, much will depend on the numerous implementation texts (orders, decrees, various reports) that will be written in the forthcoming months, and on the way in which the actors approach them.

Whatever the case, the period just past has been characterised by a strong surge of the mobility theme in political debate.

IN GREECE

Greece is a great maritime power. 21% of the world's fleet (in terms of ship carrying capacity) are Greek. Greek ship owners specialise in tramp (freight transport on demand) and not in regular shipping lines. It is an unstable activity, speculative, in which losses, like profits, can be high. However, these 4,000 ships do not much affect Greece, and their owners do not invest in its ports or landside infrastructure.

The Chinese ship owner Cosco is the third-largest transport carrier in the world for containers on regular shipping lines, and also has subsidiaries shipping bulk cargo, in logistics services, in naval construction and repairs, dock handling services, container manufacture, etc. The group has about 550 vessels. It was awarded the concession for the port of Piraeus and made it the sixth largest port in Europe for containers and the largest in the Mediterranean (with 5 million TEU in 2018). But the biggest proportion of traffic passing through this hub is transhipped from one vessel to another (from a «mother ship» to a «feeder ship») and does not touch Greek territory, meaning that the national logistics operators do not benefit much. In comparison, the port of Salonika has a very different dynamic and specialises in the export traffic of Balkan countries.

To support the country's development, it would be better to enable the national economy to benefit from this port traffic, by linking logistics activities and surface transport operators to it. To achieve this goal, improvements would be needed in the capacity and quality of the railways, profiting from the fact that the direct route to Central

Europe, transiting through Piraeus, is eight days quicker than sailing round to Northern Europe up as far as Hamburg. Yet who will improve the railways, when the historic operator OSE has been bought by the Italian FS, and when interoperability between neighbouring countries has not been achieved? The issue of maritime transport is thus particularly strategic in the case of Greece.

IN ITALY

In Italy, it is worth noting especially the «Smart road initiative» which has been the subject of an agreement between the government and the city of Turin to create an innovative system for urban mobility. It includes in particular a real-site experiment with autonomous cars (in mixed traffic but also shuttles in protected corridors). Researchers (including from the University of Parma) and manufacturers are participating in the project. The legislative framework had to be modified for this experiment to take place.

A polemical argument is developing on the topic of scooters, for which there is no provision in the Highway Code, and which are at the moment illegal (whereas in France they are mentioned in the LOM and charters have been introduced in some cities).

The collapse of the bridge at Genoa led to an increase in checks on the state of bridges, but also called into question the motorway concessions. Atlantia, a component of the Benetton holding company and manager of the bridge structure (as well as of the airports of Rome and Nice), was asked to participate in the project to save Alitalia alongside Ferrovie dello Stato (FS), Delta Air Lines and Lufthansa, but the dossier is currently blocked.

FS, the national rail company, has presented a five-year plan for the industry. Such a multi-annual vision for the future is indispensable: the group (the holding company FSI and its specialised subsidiaries, including ANAS, the autonomous national agency for roads) is the largest investor in the country. The group is in a good financial position, despite its commitments on Alitalia, and the outlook looks favourable.

The opening-up of rail transport to market competition has been well prepared (and is already in operation in high-speed rail, in which the arrival of a new entrant has been accompanied by a reduction in prices, an improvement in quality and a diversification in the supply of services and better revenues for the infrastructure manager).

On the subject of motorways (for which FS is responsible), the electricity provider Enel is pushing electric mobility and the installation of charging points.

The level of investment envisaged is 58 billion euros between now and 2023, of which 42 billion for infrastructure (and a third of that going to the South).

Impact assessment studies have been carried out on these plans. The company has launched an application for the intermodal organisation of mobility trips: «nugo». A dynamic policy of exploiting its assets (property holdings, notably) has been launched. Subsidiaries will be created abroad. FS aims to achieve an overall balance between revenues and expenditure in 2035.

Italy has an independent regulatory authority for transport, ART, created six years ago and renovated a year ago, whose powers are wider than those of the French ART: apart from regulating the whole transport sector, the Italian authority is responsible for calls for tender in markets open to competition and for monitoring service quality.

On rail competition: following the opening of the national high-speed market, the Piedmont region was the first to take the initiative on opening regional rail markets. In order to allocate lines, it was necessary to invent a new way of identifying the general principles and the procedures by which the potential candidates (in this case GTT [Gruppo Torinese Trasporti], the British subsidiary of DB's Arriva and Trenitalia) would express interest. It is worth noting that Trenitalia (FS) envisaged a direct allocation of the markets in other regions. In the end, in May 2019, only Trenitalia remained in play.

IN POLAND

In Poland, the government has just published a transport strategy document. The economy continues to be characterised by strong growth (+ 3.5% a year during the last ten years, plus 5% last year) and a still higher growth in traffic (+ 4.3% a year) including international road transport (60% in total for freight). For travellers, mobility grew by 4.4% a year, because of car traffic but also air travel (with an increase of 12%, notably due to temporary emigration to the UK).

The strategy document does not really deal with the concrete problems confronting the transport system but sets out forecasts, notably to clarify the role the State must take, alongside businesses, in future years. Six major objectives were laid down:

- Support for investment: the priority will from now on be rail infrastructure (after the completion of a quality network of major roads by 2030 of about 8,000 km, of which 3,500 km are already achieved). Effective management of transport systems will come from the application of new technologies, automation and electro-mobility, providing the performance of batteries improves while their cost decreases.

- Reinforcement of collective transport, alternatives to cars and road congestion.

- Road traffic safety, with 3,000 deaths a year currently.

- Ecology: coal and lignite must be rolled back relative to renewable sources of energy, and vehicles must be more energy efficient and less polluting.

- Improvements in the use of financial resources: it is thought that some 20% of funds devoted to transport projects are wasted (on budgetary overspends, supplementary work, etc.).

The road investment programme still takes 30 billion euros, but administrative decentralisation has been a success and the communes are now the foremost builders of new roads.

On the subject of transport technology, the first purchases of electric vehicles are being seen, with a certain delay compared to other European countries (there are estimates of sales of 5,000 vehicles this year, in particular through car-sharing companies).

The South Korean LG Chem has announced the construction of a very large battery-making factory.

The Polish road haulage industry is very competitive and the Polish flag comes first for international haulage in Europe. It is due not only to Polish businesses (notably the high number of SMEs) but also to the delocalised subsidiaries of Dutch, Belgian and German freight companies. The proportion of foreign investment even substantially dominates logistics operations. In the face of air traffic growth, the building of a new airport hub has been announced, with a capacity of 60 million passengers a year, which seems to be greatly over-sized. On waterway transport, the deepening of the Oder would represent a considerable expense, at 20 billion euros.

This strategy document does not however include an explicit multi-annual programming of investment. It succeeds that established in 2013 by the government of M. Tusk and was published before the forthcoming European White Paper, to signal a political autonomy from the European Union. It was not the subject of a debate in Parliament.

IN SWITZERLAND

In Switzerland, technological research on transport relates especially to the hypersonic magnetic levitation «train», of which the most well known example is the Hyperloop project. Swiss Railways (CFF) intends to start experimenting at a trial site, in liaison with the École polytechnique fédérale de Zürich (EPFZ).

The advantage of having a vehicle travel in a tube with a high vacuum is that energy consumption is reduced (this solution had already been explored in the Swissmetro project of the 1970s). The research is investigating in particular the optimum operational degree of vacuum. In any case, it concerns a radically new infrastructure for which all the metrics remain to be defined (diameter of the tube, reference speed, etc.). This question is crucial, for the decisions taken will structure what comes next. For the experimental site, it is planned to construct a tunnel at half-scale, that is, 2.2m in diameter, 3,000m long and permitting a speed of 900 km/h (the current record with this technique is 600 km/h). The procedures for constructing the site are equally being examined, and it is envisaged, for example, that structural elements could be made of 3D printed concrete.

Similar research is being pursued elsewhere. Japan already has long experience with Maglev technology and has started on the construction of an operational line between Tokyo and Osaka passing through the mountains (to avoid the densely-inhabited coastal plain), that is expected to be in service in 2027, at a time when the loans needed to finance the Shinkansen (TGV) will have been reimbursed. The Chinese are going back to Maglev technology, already used to link Pudong airport with the city of Shanghai. The Russians are raising the idea of a long Trans-Siberian corridor, on which the contact-less Maglev technique would reduce infrastructure maintenance costs. In parallel with the technical research, the uses these solutions would satisfy and the corresponding economic models would need to be defined.

In addition, the CFF is going beyond its railway domain to become a generalist mobility operator by concerning itself with new forms of mobility, long-distance coaches, the development of the autonomous vehicle, etc., having already undertaken limited experiments in various fields.

TRANSPORT POLICIES
AND STRATEGIES IN EUROPE

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