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Climate Giant in Chains – Combined Road/Rail Transport

*23 Recommendations for action on how we can leverage
the growth potential of rail through combined transport in
Germany and Europe*



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Preamble

Time to act

Combined road/rail transport (CT), i.e. the combination of a pre-carriage and/or onward carriage by road and a main carriage by rail, is the rail segment in freight transport with by far the highest growth potential. CT therefore plays a central role in generating additional traffic on the railways and thus contributing to CO₂ reduction in the transport sector. Without the appropriate framework conditions for CT, the national and European modal split targets for rail will not be achievable.

From the point of view of the customers of freight transport, i.e. the clients of transport services in industrial companies, CT is the most flexible and innovative of all rail segments. In view of the continuing growth in the volume of goods, both nationally and globally, its environmental balance and the possible reduction in road congestion represent additional advantages that are rapidly gaining in importance. Of all the rail segments, CT will also find it easiest to be attractive in the future for those groups of goods and transport tasks for which rail has rarely been used to date.

However, CT is also more demanding and more complex than pure road or rail transport: each transshipment from one means of transport to another means additional effort and costs time and money. The same applies to the necessary empty container logistics, i.e. the provision and collection of the transport containers. Due to the large number of players involved - freight forwarders, haulage companies, terminal operators, CT operators and rail transport companies - the customer and communication chains are longer in CT and the transparency along the transport chain is often less high for the consignor and consignee in comparison. As a result, for the shipping industry as a customer, the conception, commissioning and management of CT transports are often even more time-consuming and knowledge-intensive. The basic challenges for CT also include

in capacity bottlenecks in the rail network and at the terminals as well as in efficiency potentials that have yet to be leveraged and in a suboptimal and partly unclear European and national regulatory framework.

The goal of this paper is to identify the levers that reduce barriers to entry to CT, create effective incentives for customers and providers, and enable the transportation sector to increase the attractiveness and performance of CT for existing and potential new customers.



What can politicians and the federal government do, and how quickly, to strengthen combined transport?

Quick to implement

– rapid development of the effect

AAA

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Can be implemented in the current legislative period

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To be initiated in the current legislative period

A

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01

Where do we stand?

Despite volume growth, rail's share of freight traffic is stagnating. Combined transport (CT) has the capability portfolio and the market potential to change this.



Although everyone has long been talking about the importance that rail will play for mobility and logistics in the future, its share of freight transport performance has been stagnating for years. In 2019, rail still only accounted for around 19 percent of transport performance in Germany¹ – Why is that?

The simple answer is: the clients of transports choose the transport solution that best meets the requirements of their particular transport task. The criteria for selecting the mode of transport are essentially: Transport duration, reliability, costs, and increasingly the climate friendliness. Rail must improve in particular in terms of reliability, which means a significant increase in

punctuality, and in terms of costs. The climate advantage of rail, which is based on its efficiency in large and heavy volumes even more than on the use of electric locomotives, is not enough on its own to increase its share; this is especially true since this advantage will shrink in the long term as a result of the decarbonization of road freight transport.

If the share of rail is to increase significantly, it must therefore become more attractive for the customer. It will become more attractive if the rail system as a whole is strengthened in such a way that providers of transport solutions are more often in a position to make offers on the transport market that better meet the high demands of modern logistics chains in terms of reliability and plannability, cost efficiency, flexibility and speed.

¹ Local transport mileage under 50 km, where trucks are unrivalled in cost effectiveness, not included, cf. Federal Environment Agency: mileage, transport performance and "modal split", 08.02.2022, <https://www.umweltbundesamt.de/daten/verkehr/fahrleistungen-verkehrsaufwand-modal-split#good-transport>, last accessed 17.02.2022.

Combined transport is the rail segment with the highest growth potential

Source: Eurostat 2021

Development of CT in the EU compared to rail freight transport in the period 2009-2019



Base year 2009 = 100%.

Both the Federal Office for Freight Transport and the market participants see the highest growth potential of all rail segments in CT. Its good development prospects are based above all on the container volume in world trade, which will continue to grow strongly in the future, and on the ability to combine the strengths of road and rail - be it in the form of containers, CT-capable semitrailers or with the aid of innovative loading solutions. In this way, CT makes environmentally friendly rail transport accessible to customers who do not have their own rail connection. It can also help to cushion the consequences of driver shortages and bottlenecks on the roads.

However, in addition to these strengths, CT also has considerable disadvantages. For example, the transfer of goods from one mode of transport to the other

requires additional time and additional effort, ties up resources and increases the susceptibility to disruptions in the transport chain. Compared to pure road transport, transport speed, flexibility and plannability are less pronounced. All of this ultimately results in CT only being able to play to its strengths at all for medium distances.

Politicians, the rail sector and shippers as rail customers all see that CT can be a very powerful driving force for the goal of getting more goods onto the railroads. However, the growth of CT is still hampered in many respects and a whole bundle of possible measures to make CT more attractive has not yet been sufficiently exploited.

Where do we want to go?

In the future, CT will be in a better position to offer competitive solutions for a wide range of different transport tasks. Thanks to attractive offers, reliability and a high level of customer orientation, it will increasingly be the preferred option over pure truck transport for medium distances and above. To a much greater extent than before, it thus offers companies wishing to transport their products by rail the opportunity to reduce the CO₂ emissions of their logistics chains at an economically justifiable cost.



The target image of the loading industry, i.e. the (potential) customers of rail freight transport and CT, can be condensed into a vision in six points:

- Continuously increasing infrastructure investments in the rail network and terminal infrastructure as well as rapid network expansion will lead to a more efficient and resilient rail network without bottlenecks. Freight trains - loaded also with time-sensitive goods – will reach their destinations on time. The 4-meter tunnel clearance profile (P400) and a train length of 740 meters are the operational standard on all major lines and their bypass routes.
- In the event of disturbances in the network allow well designed alternative and rerouting routes ensure that traffic can be handled smoothly. Thanks to effective cross-border corridor management and technical and regulatory harmonization, diversionary traffic can of course also be handled on international routes.
- High terminal capacities allow for frictionless access to rail and reliable planning of time window deliveries. The arrival times are also transparent for forwarders, shippers and end customers across all modes of transport during the ongoing transport.
- Digitization, automation and technical innovations, especially in the area of handling technologies and equipment, have made the Efficient transshipment between rail and road and quickly made.
- The roadside leading and trailing is characterized by good working conditions and thus high driver availability and is continuously becoming more climate-neutral through the use of alternative drives and fuels.
- Autonomous driving is used in particular in terminals and in the pre-carriage and on-carriage of CT transports are introduced and promoted. In order not to weaken the location factor of competitive logistics, the privileges of CT will be uniformly expanded throughout Europe and its framework conditions improved, but the performance and efficiency of other transports and modes of transport will not be restricted.



What do we need to do?

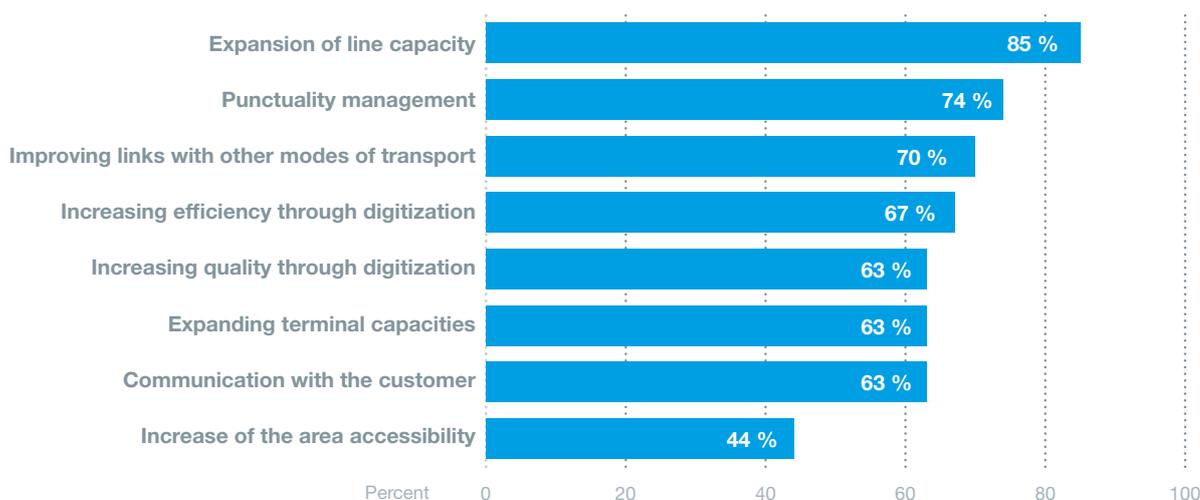
Rail must succeed in catching up if it is to transport significantly more freight volumes than today. To achieve this, the levers must be set at higher capacities, more efficient processes and greater reliability, and rail must continue to expand its portfolio of capabilities. CT has a key role to play in all of this. However, the predicted growth prospects for CT are anything but a foregone conclusion: broken transport chains are more demanding and generally less efficient operationally than monomodal transports. Action is needed for strong CT in a variety of areas: Sufficient network and terminal capacities must be created, incentives and facilitations must be maintained and expanded, and technical innovations, digitalization along the entire transport chain, and platform solutions must be reflected in more attractive and new transport offerings.



The most important levers for more attractiveness in rail freight transport

Source: BDI

Survey results of a poll among BDI members and companies, February 2020



Create network capacities in line with demand and the future

1 Creating network capacities through expansion and modernization

Shippers and, above all, their customers expect reliability and thus punctuality of arrival from rail freight transport. Punctuality, in turn, depends heavily on network availability and network capacities. The basis for improving punctuality is therefore primarily rapid network expansion. The central limitation for growth and increased performance of CT today lies very much in the limited network capacities, which already make the German rail network a bottleneck for European rail freight traffic and threaten to push the punctuality targets of network operators and rail transport companies further and further away: The congestion of neuralgic corridor sections and nodes, a lack of efficient bypasses, a lack of suitability for 740-meter trains, the expansion of express train paths for time-sensitive goods, and the targeted growth of passenger traffic, which shares the same network with freight

traffic, requires a massive expansion and consistent modernization of the network with infrastructure and on-board ETCS, digital interlockings and partially automated operation. Since capacities are already exhausted at many points in the network, the measures that should be implemented quickly are those that are most effective in terms of capacity and can be implemented in a way that is particularly easy on capacity. Only by overdue acceleration of the planning and approval procedures will it be possible to reconcile demand and network capacities in the medium and long term.

2 Planning and managing construction sites in a market-compatible manner

The greatest challenge that arises in the course of network expansion is to combine increasing construction activity with efficient network operation. For CT, the quality of service in terms of reliability and punctuality must be maintained at a level that is also acceptable to freight forwarding customers. To achieve this, construction sites must be planned in a capacity-saving manner and

customers must be involved in the planning process at an early stage, with a high prioritization of capacity maintenance in the evaluation and organization of construction measures. The basis for this is formed by the measures agreed in the "Construction Site Management Round Table" (2016-2018), as well as the requirements of Delegated Decision (EU) 2017/2075 (Annex VII of Directive 2012/34/EU) in favor of a market-compatible approach to capacity constraints. In both cases, we note glaring delays in implementation.

3 Communicate constraints in a more agile and informational way

Information on network restrictions due to construction sites and special events, resulting in delays and train cancellations, must flow to the rail transport companies earlier and more agile, and at the same time be so reliable and factual that it can be used as a basis for the supply of locations and customer shipments on the part of the industry.²

4 Adopt a corridor perspective and better manage capacities internationally

The performance of CT is based on efficient international network corridors. Although the European networks are interoperable, border crossings still resemble a hurdle race. What is lacking is genuine technical and operational homogeneity, which not only makes cross-border operation possible, but also significantly simplifies operational processes and thus makes them more efficient. Cross-border corridor management also needs to be strengthened. End-to-end monitoring of cross-border traffic on the basis of uniform performance indicators (including the setting of punctuality targets) and the recording of reasons for delays appear to be

² An exchange between the shipper industry and network operators has been taking place in the BDI since December 2021 on the issues of how to fundamentally improve construction site management and the communication of restrictions. As a result of this exchange, a catalog of political demands is to be developed separately to this paper.

promising instruments for achieving a path of continuous and systematic improvement.³

5 Thinking 1,500 meter trains ahead today

In the long term, the aim is to create the conditions for running trains with a length of up to 1,500 meters at least on the most important European corridors. The pilot project of an 835-meter train on the Maschen-Padborg line has shown the positive effects of longer trains, but at the same time the challenges have become clear. The technical and economic prerequisites must be clarified by further pilot tests and research work. In parallel, it is essential that the necessary standards are already created throughout Europe so that trains with a weight of 2,000 tons, a length of up to 740 meters and a clearance of the P400 profile can run in Europe and in this way a uniform European network is quickly made possible.

6 Strengthen continental connection in the direction of Asia

The potential of intercontinental better-connected rail routes for world trade and Europe as a business location is currently indicated by the EU's Global Gateway Initiative and the Chinese One Belt One Road Initiative. While China is strongly committed to intercontinental connectivity with partly questionable instruments, the potential of the EU-Asia connectivity strategy through the Global Gateway project has not yet been exhausted. In Europe, it is a matter of already expanding the end points, increasing transshipment capacities and creating more flexibility through further branches or access points to continental traffic. Russia's attack on Ukraine has made it clear that diversification of intercontinental rail connections is necessary to avoid one-sided dependencies and to safeguard

³ In this context, reference should also be made to the EU Commission proposal of 14.12.21 amending Regulation (EU) 2021/1153 and Regulation (EU) No 913/2010 and repealing Regulation (EU) 1315/2013. In Article 18, it states, inter alia: "At least 90% of freight trains crossing at least one border of a European transport corridor shall reach their destination [...] at the scheduled time or with a delay of no more than 30 minutes".

traffic against geopolitical upheavals as far as possible. Innovations such as the new 75-ton tank container segment should also be introduced on the long-distance route between Europe and Asia. Underpinning the EU-Asia connectivity strategy or the Global Gateway project with decision-making powers and financial resources on a scale commensurate with the magnitude of the challenges would be an important step for the industry in Europe.

Expand terminal infrastructure and promote transshipment

7 Promote expansion of terminal capacities in Germany and Europe

Terminal capacities for CT are in great need of expansion - and not only in view of possible future growth: numerous terminals in Germany are already overloaded and there is a lack of concrete ambition in other European countries for the necessary expansion of the existing, patchy basic coverage. The federal subsidy for CT facilities, which expired at the end of 2021, should therefore be expanded in terms of scope and in terms of the objects of subsidy (including replacement investments, expansion to 75-ton cranes, digitization, transport-related services such as storage and automation), quickly focused and always adequately financed in the federal budget. The fact that, due to a lack of successful coordination between the federal ministries, it has still not been possible to close the gap in federal funding for CT facilities that was opened up in January 2022 is a brake on the expansion of CT and sends a fatal signal. In addition, funding should be implemented at EU level that offers clear incentives for all member states. Another major stumbling block in Germany is the difficulty in acquiring expansion areas for terminals; terminal operators who are willing to expand often encounter little support from the municipalities.

8 Investment strategy for terminal infrastructure in the EU foreign country

Although Germany is one of the EU countries whose transport network is most strongly determined by transit and international traffic, government investments in infrastructure take place exclusively on German territory, in contrast to Switzerland, for example. Through targeted investments by the federal government in CT terminals abroad, whose source or destination traffic primarily affects Germany, additional transshipment capacities can be created where traffic has its origin or destination. In this way, more transports would be shifted to rail while still abroad and the roads in Germany would be relieved.

9 Promote terminal handling costs

The high terminal costs per road consignment are the "ticket to the rail system" and today represent a major obstacle to shifting traffic to rail. These costs should therefore be reduced by 50 percent by means of a transshipment price subsidy similar to the subsidy for track and facility prices in rail transport.

Strengthening the regulatory framework

10 Ensure cabotage-free roadside pre-carriage and onward carriageways

Of fundamental importance for the attractiveness of cross-border CT is its equal treatment with international road haulage with regard to the cabotage regulations according to Article 4 of EU Directive 92/106: The roadside pre-carriage or onward carriage of CT made in Germany is exempt from the cabotage regulations in the same way as the domestic road part of international truck transports. If this equal treatment of intermodal transports and pure road transports were to be called into

question with regard to EU Regulation 2020/1055, CT would lose considerable attractiveness⁴ and countless transports would return to the road; it is therefore also of great importance that this equal treatment is guaranteed in as many EU member states as possible. At the same time, compliance with labor and social regulations must be ensured through controls and the availability of adequate overnight accommodation as well as parking and supply infrastructures for the driving personnel.

11 Securing empty container transports as part of CT

The provision and collection of empty containers which are or were used in CT is part of CT as a container-based transport system by definition. In order to be able to carry out CT transports by rail, arrivals and departures without loading to and from the CT terminals or transshipment stations are necessary and an operationally incremental part of the CT transport chains. Particularly in times of limited capacities in the rail network for light but fast freight transports, it is recommended that weekends for empty container logistics, as longer transit times by rail are cushioned at weekends. Here, however, the German Road Traffic Regulations (StVO), in conjunction with a questionable interpretation by the authorities controlling road traffic as to what is and what is not part of a combined transport operation, restrict empty container transports. Therefore, it must be clarified that such empty container transports are part of a CT traffic and as such are exempt from the Sunday driving ban for commercial road haulage.

12 Allow more transport containers beyond the standard container for CT

By putting intermodal transports on an equal footing which, due to the lack of appropriate transport containers (e.g. ISO containers), have not so far

fallen within the definition of CT (e.g. bulk containers, containers for use with modular freight wagons, 75-ton tank containers as a new segment in intermodal transport), the attractiveness of intermodal transport can be significantly increased. At the same time, however, the performance of the CT system is also based on the fact that the containers used in regular CT traffic are within reasonable and widespread standards. Therefore, in the future, the container, the transshipment, transport-related services such as storage, the transshipment terminals as well as the pre- and on-carriage should be defined as components of CT, so that more intermodal transports can benefit from the regulatory privileges and the promotion of CT in the future. This should be taken into account by the German government in the upcoming revision of Directive 92/106/EC into national law as well as in the revision of the StVO and StVZO.

13 CT Directive: EU-wide harmonization of best rules

The revision of Directive 92/106 announced by the EU Commission must make CT more attractive. The prerequisite for a competitive CT is standardization and mass suitability as well as a national implementation of the regulations in Europe that is as uniform as possible, for example with regard to the definition of a CT container or the definition of the nearest suitable terminal. A patchwork of different regulations must be avoided. At the same time, however, the goal of fewer optional provisions and less interpretability of the regulations must not lead to a loss of attractiveness for CT. If CT is to make further progress, the best CT-friendly rules must become the standard in the EU, not the second or third best.

⁴ Cf. International Union for Combined Road-Rail Transport (UIRR): press release, Feb. 22, 2021, last accessed Jan. 11, 2020, <https://www.uirr.com/de/media-centre/press-releases-and-position-papers/2021/mediacentre/1772-commission-study-confirms-sector-ct-will-suffer-under-the-new-eu-road-haulage-rules.html>.

Bringing innovations into application

14 Raising the flow of information along the entire transport chain to a new level

In the future, information on the expected time of arrival (ETA) must also be reliable and precise for CT and must be provided proactively and agilely to the shipping companies. For certain tasks, CT must also be capable of just-in-time and just-in-sequence. For this reason, it must be possible to collect, exchange and retrieve information from all participants along the entire transport chain. This form of transparency also forms the basis for numerous value-added services such as temperature and impact force monitoring. The rail sector should therefore be supported by the federal government in applying common standards and platforms that enable the flow of information along the entire transport chain. The further implementation of the industry initiative for a common platform (CT 4.0) can accelerate this process; public funding may be necessary for this. It would also be helpful to offer rail freight services for rail marketing and the use of free parking spaces.

15 Financing instruments for the Digital Automatic Create clutch

The DAK is more than just a coupler. It not only fundamentally modernizes shunting processes, which are also frequently required in terminals for CT trains that usually run as block trains, but it is also the prerequisite for the intelligent freight train and digitally networked CT transports: Intelligent data management and predictive, condition-based maintenance become possible. Modern logistics relies on real-time data wherever it can be collected and made available. Considerable further potential for rail operations arises in connection with ETCS Level 3 and highly automated rail operations. In order for this decisive technological leap to succeed, the necessary financing instruments for DAK must be created at both national and EU level. A coordinated introduction and promotion at European level is indispensable in view of the high share

of cross-border traffic in rail freight transport, but also in view of the level playing field for the railway undertakings operating in Europe. However, CT also plays a decisive role in the introduction of DAK. New systems such as 75-ton tank containers and modular wagons bring conventional and CT traffic together. This allows the wagon to be converted and the superstructure (e.g. a tank) to be decoupled. This is a significant advantage in the conversion process for industries that depend heavily on single wagon traffic (fewer rail cars to convert, decoupling to the superstructure). Therefore, facilities such as terminals and railports on industrial sites that bring CT traffic and single car traffic closer together should also be considered in the DAK conversion and promoted early (i.e., starting in 2023).

16 Potentials of the digital Exhaust rail

DAK and ETCS are the two basic technologies for increasingly digitized and automated rail freight operations. The full potential of digital rail for capacity and smooth rail operations will be tapped by combining different technologies. The future lies in highly automated operations, and rail is predestined as a track-guided system. Concrete instruments are: New software and hardware for intelligent traffic control, advanced sensor technology, powerful real-time location systems, high data connectivity and processing. The decisive course must now be set for this:

- Provide funding for structure-side rollouts.
- Establish and finance a support program for on-board ETCS retrofits.
- Set up an R&D program to boost innovation and enable prototypes and tests of technology development under real conditions. To this end, the existing Future of Rail Freight program should be given a significantly higher financial allocation in the federal budget.
- Create a legal framework, standardization and approval procedures for automated rail operations at both national and European level.

17 **Raise potentials of interlocking intermodal transport and single wagonload traffic**

CT can also grow unconventionally, for example by creating interfaces with the single freight car system. The formation of "mixed trains" can create synergies that benefit both systems. In this way, the capacity utilization of CT trains can be increased, as can that of single wagonload trains, and additional and possibly faster transport options can be opened up. In addition, the single wagon segment also benefits in that companies that do not have a rail siding can gain access to this rail segment and, for example, be able to supply customers who are served by single-wagon transport.

18 **Realize innovation roads for CT**

The road network is the red carpet to rail, which is still being rolled out too hesitantly. On suitable, defined routes in the close vicinity of selected, suitable intermodal terminals, feeder and onward runs should be tested with innovative, e.g., automated vehicles and weights that are sensibly increased for the respective purpose. Specifications regarding drive type, speed and maximum distance offer versatile scaling options.

Creating attractiveness through new incentives

19 **Increase share of CT-capable semitrailers through additional cost subsidies**

Around 70 percent of long-distance truck traffic in Europe today is handled by standard semitrailers. However, it is estimated that more than 90 percent of these are currently not craneable. The fact that these trucks cannot use the standard handling processes in CT represents one of the entry barriers to the use of rail. At the same time, however, the craneability of semitrailers also entails disadvantages such as higher purchase costs and higher weights.

A national subsidy should therefore be introduced to promote craneability. A legal anchoring of the craneability of semitrailers at EU level is being discussed as an additional, long-term measure; however, this should then also be accompanied by a European instrument to compensate for the additional costs incurred.

20 **Attractiveness through elevation of the permissible Increase total weight in CT**

A moderate increase in the permissible gross vehicle weight (GVW) in the front and rear of road vehicles to over 44 tons, for example to 48 tons or 50 tons, has great potential to further increase the attractiveness of CT and reduce CO₂ emissions, and would also contribute to reducing the shortage of drivers in Germany. Moreover, it could be implemented quickly and would be largely cost-neutral for public budgets. However, an increase in the maximum permissible weight in CT is associated with technical challenges with regard to the equipment on the rail and road sides (e.g. with regard to axle load, number of axles, number of gripping edges, compatibility of container carriers and pocket wagons), which can stand in the way of universal applicability, and undesirable effects on the road infrastructure cannot be ruled out. Therefore, the federal government should investigate the potential and feasibility of increasing the zGG in CT. This should be done against the background of experience in other EU countries and independently of the question of increasing weights in conventional road haulage. Restrictions to certain routes in the road network could be an option for the design.

21 **Exempt roadside pre- and on-carriage from tolls**

In the national implementation of the European infrastructure costs directive, which provides for a stronger alignment of the toll along the CO₂ emissions of the vehicles, it should be taken into account that truck journeys in the pre-carriage and onward carriage of CT as intermodal transports make a considerable contribution to

CO₂ avoidance in the freight transport sector. Exemption from tolls for journeys on the pre-carriage and onward carriage by road reduces the "economic distance" to the terminal and is therefore an important element in increasing the attractiveness of the CT transport chain.

22 Cost structure due to further regulatory levers improve

The cost structure of rail freight transport and thus also of CT can be improved by further regulatory levers. The more these levers are applied at the same time, the more potential they have to close gaps in attractiveness compared to transport alternatives that do not rely on rail. These levers have in common the advantage that they can be implemented by legislation and have a comparatively immediate effect on the market:

- Continuation of train path price subsidies in Germany using unused leeway, as well as analogous instruments in all EU member states
- Expanded federal support for combined transport facilities
- Reduction of user charges for sidings Reduction of energy taxes for RUs Reduction of user charges and infra-structure price component for electricity purchases

23 Introduce relocation bonus for freight forwarders in the form of a welcome bonus

From the point of view of the shipping industry, the quality and performance of the transport service offered are by far the most important criteria for the choice of transport chain. Nevertheless, in the case of CT, promotion at the level of freight forwarders could play an important initiating role: Due to the more demanding logistics compared to pure road transport, many small and medium-sized companies shy away from entering the CT transport system, which is new to them. On the other hand, carriers who have reorganized their logistics and shifted transport operations generally use CT on a permanent basis. To encourage more companies to switch to CT, the federal government should therefore grant a one-time welcome bonus for newcomers who have not used CT to date. This would reduce the economic risk of the logistics switch and lower the threshold for permanent modal shift.

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