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From: Secretary-General of the European Commission, signed by Ms Martine DEPREZ, Director

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To: Mr Jeppe TRANHOLM-MIKKELSEN, Secretary-General of the Council of the European Union

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Subject: COMMISSION STAFF WORKING DOCUMENT EXECUTIVE SUMMARY OF THE EVALUATION of the White Paper **Roadmap to a Single European Transport Area – Towards a competitive and resource efficient transport system**

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Delegations will find attached document SWD(2020) 411 final.

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Brussels, 10.12.2020  
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**COMMISSION STAFF WORKING DOCUMENT**  
**EXECUTIVE SUMMARY OF THE EVALUATION**

*of the*

**White Paper**

**Roadmap to a Single European Transport Area – Towards a competitive and resource  
efficient transport system**

{SWD(2020) 410 final}

The 2011 White Paper ‘Roadmap to a Single European Transport Area – Towards a competitive and resource efficient transport system’<sup>1</sup> identified the need to tackle the challenge of breaking the transport system’s dependence on oil without sacrificing its efficiency and compromising mobility. As the paramount objective of European transport policy, it set the establishment of a **transport system that underpins European economic progress, enhances competitiveness and offers high quality mobility services while using resources more efficiently**. The specific objectives set for the White Paper were about **reducing greenhouse gas (GHG) emissions** by around 60% by 2050 compared to 1990, **limiting the growth of congestion** and **reducing oil dependency** for a more sustainable transport system. The White Paper put forward a comprehensive list of initiatives to achieve these objectives. It also set **ten goals** for a competitive and resource efficient transport system, to serve **as benchmarks for achieving the 60% GHG emission reduction target**.

The **Commission has acted on almost all of the policy initiatives planned in the White Paper**. The impact and results of this roadmap, until now and estimated until 2050, are assessed in view of their effectiveness, efficiency, internal and external coherence, EU added value and relevance. The assessment builds on an internal analysis of action implementation, external input, such as the stakeholder consultation, and an external support study, including model projections on the impact of the policies adopted following the White Paper.

The results from the modelling exercise undertaken for this evaluation show that for the EU-27, thanks to the White Paper initiatives, **overall CO<sub>2</sub> emissions from transport<sup>2</sup> would be 16% lower relative to the Baseline in 2030 and 39% lower in 2050**. Policies adopted after 2011 would contribute significantly towards the White Paper milestone for 2030 but fall short in delivering the 60% emissions reductions by 2050. As already assumed for the White Paper, additional policies or an intensification of the current policies beyond 2030 would be needed to close the emissions gap.<sup>3</sup>

The **oil dependency of the EU transport sector is now clearly decreasing, but is still high**. The increase in the use of electricity and biofuels in transport has been a main determinant of the decrease in fossil fuel dependency in recent years. The evaluation estimates that the initiatives adopted by the end of 2018 result in reductions in oil dependency, but the transport sector will still be dependent on oil and petroleum products for 77% of its energy needs by 2050.

**Progress has been limited in addressing the problem of road congestion**, which persists in Europe. Based on projections in the context of this evaluation, congestion will still increase over time although at slightly slower pace than without the White Paper initiatives.

The evaluation also assessed progress towards the ten headline goals: while **some goals have been or are projected to be achieved, others not or are too early to assess**. This is also due to the long-term time horizon of the roadmap (until 2050).

The Commission has evaluated the current Energy Taxation Directive. The evaluation concludes that overlaps, gaps and inconsistencies significantly hamper EU objectives in the field of energy, environment, climate change and transport.

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<sup>1</sup> COM (2011) 144 final.

<sup>2</sup> Including international aviation, excluding international maritime shipping.

<sup>3</sup> The impact assessment accompanying the 2011 White Paper has assumed an intensification of the current policies beyond 2030 to achieve the 60% emissions reductions by 2050.

**Several initiatives in the context of the White Paper have improved the social protection of transport workers**, in particular in road haulage. Yet, mainly civil society and research organisations fear that developments like automation and digitalisation could negatively affect future working conditions in transport.

It has not been possible to reach conclusions on the overall costs and benefits resulting from the White Paper for the stakeholder groups under analysis. It has also not been possible to identify groups of stakeholders that, overall, were subject to any undue burdens, or that experienced significant benefits. Nonetheless, from the society perspective, only looking at a few initiatives, namely those related to decarbonisation of transport, to making the EU transport sector more competitive through increased market opening and to road and air safety, the **benefits to society already outnumber the costs incurred with specific initiatives**.

**The needs of EU transport policy, as identified at the time of the adoption of the White Paper in 2011, are largely still relevant today.** This is particularly the case for the environmental performance and need to modernise the EU transport sector. Similarly, the needs to increase competitiveness and deepen the single market for transport services are still valid. Despite some progress in terms of improved safety, for stakeholders the issue is rightly still high on the agenda.

The main incoherence between the White Paper and the initiatives of international organisations, as well as some other EU policy initiatives, is **the GHG reduction goal of 60% that underlie the 2011 White Paper compared to the 90% set out in the European Green Deal, needed to achieve climate neutrality by 2050.**

In terms of internal coherence, the **initiatives identified in the White Paper generally provide a coherent framework to deliver the objectives set out therein**, which themselves are considered to be an appropriate framework for developing sustainable transport.

Action at EU level to address cross-border problems, such as climate change mitigation is indispensable and coordinated EU policies have a much bigger chance of leading to a true transformation towards a climate neutral economy by 2050. This essentially also applies to the ongoing quest for decarbonisation and reducing the environmental footprint of the EU transport sector. The **EU single market acts as a strong driver for cost-efficient change**. This is particularly important to support widespread acceptance of technological change and to foster public and private investments therein.

The **majority of efforts taken towards implementing the action points of the White Paper would either not have been possible without EU level intervention**, or could have taken place but would have been less effective and efficient. Some progress towards them could be expected in some Member States, but in most cases, this would have been fragmented and uncoordinated.