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1 Summary

Method and sample

Between 16 September and 6 October 2024, the Federal Logistics and Mobility Office (BALM) conducted an extensive online survey on behalf of the Federal Ministry for Digital and Transport (BMDV) with the aim of determining to what extent companies are familiar with EU Regulation 2020/1056 on electronic freight transport information (eFTI), if and to what extent they intend to use eFTI, which challenges they see and which conditions they believe need to be fulfilled in order for them to use eFTI. A total of 566 German transport and logistics companies (hereinafter referred to as 'logistics companies'), shippers with own-account transport operations as well as IT service providers took part in the survey.

Level of familiarity with the eFTI Regulation

The majority of companies surveyed (77%) had not heard of the eFTI Regulation prior to the survey; about 9% were unsure. Of the companies that had heard of the eFTI Regulation (14%), only one in ten feels quite familiar with it. This means that, relative to the total number of companies surveyed, the percentage of the latter is at only just over 1%.

Willingness to use eFTI

Of the few companies that are already aware of the eFTI Regulation and feel quite familiar with it, nearly all intend to provide freight transport information to authorities electronically in the future. Of the companies that had not heard of the eFTI Regulation prior to the survey or were unsure or had heard of it but did not feel very familiar with it, slightly less than half (46%) are generally prepared to provide freight transport information to authorities electronically. Willingness to provide freight transport information electronically was slightly higher among logistics companies (47%) than among shippers (40%). About 37% of the companies surveyed were unsure whether they would provide information. Various reasons were given for this. Most frequently, a possible dependence on software and IT service providers (53%), a general lack of knowledge (52%), uncertainties regarding investment costs (52%), legal consequences (52%) and acceptance by clients (50%) as well as data protection concerns (49%) were mentioned.

Reasons for using eFTI

The companies surveyed that already intend or at least would be willing to provide freight transport information to authorities electronically see the cutting of red tape within the company as the greatest advantage (55%), followed by environmental protection (48%). In third place, logistics companies expect shorter waiting times during checks (39%), while shippers indicated a reduction in sources of error as a reason in favour of using eFTI (45%).

Reasons against using eFTI

The companies that do not intend or are not willing to voluntarily provide electronic freight transport information to authorities gave various reasons for this: the risk of becoming a completely transparent company (48%), data protection concerns (45%), uncertainties regarding legal consequences (44%), lack of acceptance and applicability by all parties involved in the supply chain (42%), dependence on software and IT service providers (41%).

Necessary governmental measures

About 13% of the companies surveyed consider accompanying governmental measures necessary for the implementation of the eFTI Regulation. In particular, they call for financial support, free training on how to implement the Regulation, definition of uniform standards and processes as well as a mandatory introduction for all industry stakeholders. More than half of the companies surveyed (58%) are unable to judge whether accompanying governmental measures are necessary; about 29% are against such measures.

Level of digitalization within the company

The extent to which the companies surveyed use modern information and communications technologies (ICT) varies greatly. Of the companies surveyed, almost 68% use tracking and tracing via telematics platforms, about 59% issue electronic invoices and about 53% use web-based contract awarding and/or freight exchange platforms. Less than half of the companies surveyed currently use a transport management system (TMS) (40%) or systems for web-based order entries/customer communication (38%). Technologies even less frequently used include electronic data interchange (EDI) (24%), digital consignment notes (20%), customer relationship management (CRM) (19%), application programming interfaces (API) (18%), enterprise resource planning (ERP) (16%) and supply chain management (SCM) (15%). About 29% of the companies are currently planning to use digital consignment notes, almost 29% are planning to issue electronic invoices and almost 19% are planning to use systems for web-based order entries/customer communication. In general, the survey shows that the higher the number of employees, the more the companies are likely to use the technologies mentioned above. This finding is consistent with surveys conducted by the Federal Statistical Office on the use of information and communications technologies in the ‘transport, warehousing, postal, courier and express services’ sector.

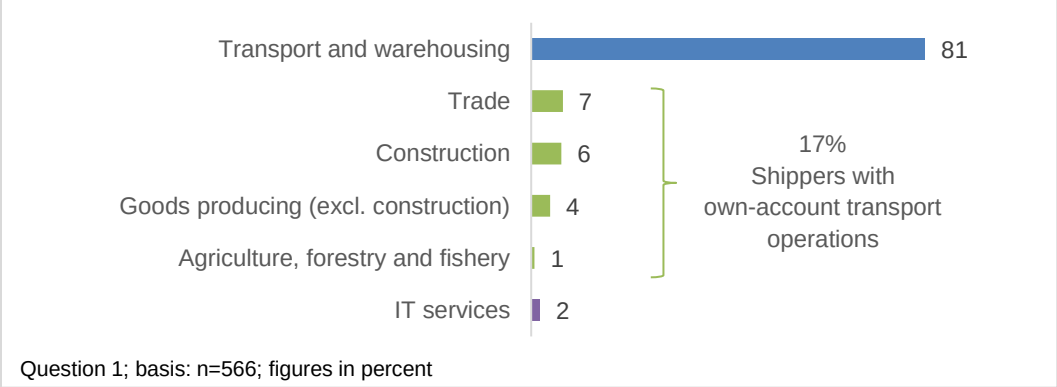
2 Description of sample

Between 16 September and 6 October 2024, the Federal Logistics and Mobility Office (BALM) conducted an extensive online survey on behalf of the Federal Ministry for Digital and Transport (BMDV) with the aim of determining to what extent companies are familiar with EU Regulation 2020/1056 on electronic freight transport information (eFTI), if and to what extent they intend to use eFTI, which challenges they see and which conditions they believe need to be fulfilled in order for them to use eFTI. About 3,800 companies from the German transport and logistics industry, shippers with own-account transport operations as well as IT service providers were invited to take part in the survey. The Federal Logistics and Mobility Office sent the invitations out by email. In addition, the survey was advertised on the Federal Logistics and Mobility Office's website, Instagram channel and LinkedIn account and shared by various trade associations via their respective communication channels. The final sample comprises 566 companies.

Economic sectors

Of the companies included in the sample, about 81% operate in the transport and warehousing sector (n=458), about 17% are shippers with own-account transport operations (n=98) and about 2% are IT service providers (n=10). The survey met with little response from the latter as well as from companies not involved in road freight traffic. Among shippers, most companies are involved in trade (n=37), followed by construction (n=35), goods producing (n=22) and agriculture, forestry and fishery (n=4) (see fig. 1).

Figure 1: Which economic sector does your company belong to?

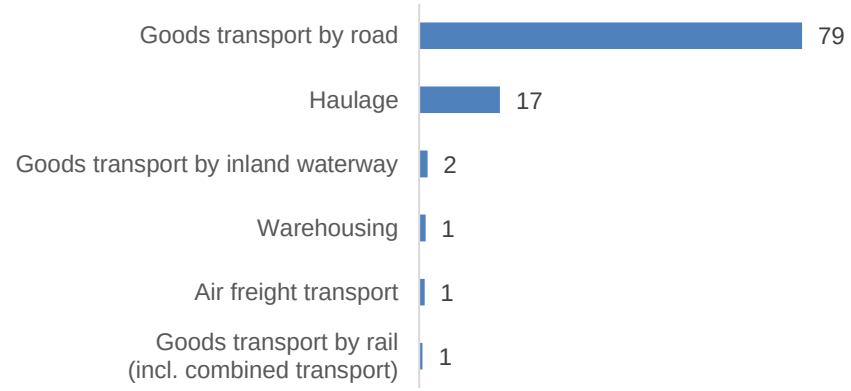


Question 1; basis: n=566; figures in percent

Business areas

Within the transport and warehousing sector, about 79% (n=360) of the companies surveyed are involved in goods transport by road, about 17% in haulage (n=76), about 2% in goods transport by inland waterway (n=8), about 1% respectively in warehousing (n=6) and air freight transport (n=5) and about 1% in goods transport by rail (n=3) (see Fig. 2). Unless declared otherwise, companies belonging to the transport and warehousing sector are hereinafter referred to as 'logistics companies'.

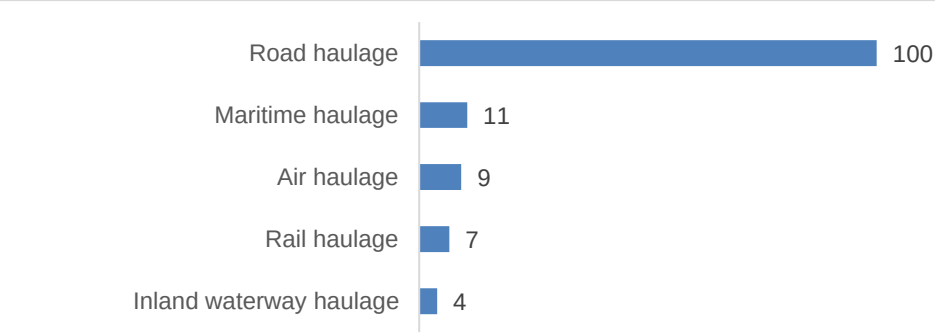
Figure 2: Which area is your company mainly active in?



Question 3; basis: n=458, **filter: only logistics companies (companies of the transport and warehousing sector)**; figures in percent

All haulage contractors surveyed provide services in road haulage (see Fig. 3). Another 11% provide services in maritime haulage, about 9% in air haulage, about 7% in rail haulage and about 4% in inland waterway haulage.

Figure 3: In which areas does your company provide services?

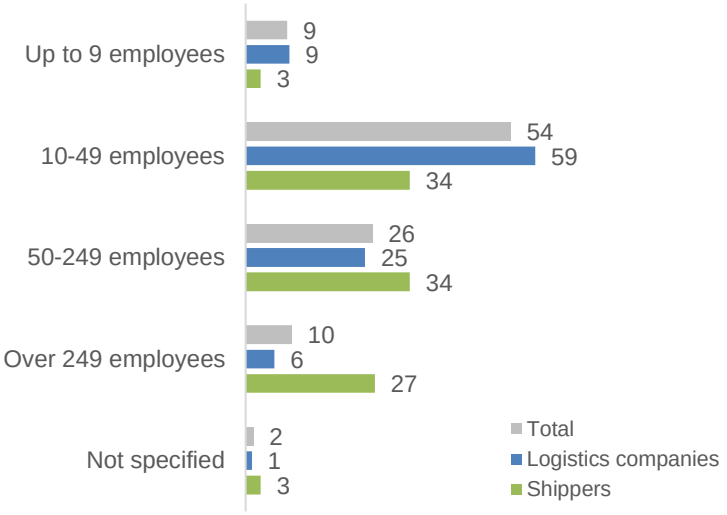


Question 4; basis: n=76; **filter: only haulage businesses**; multiple selection, figures in percent

Number of employees and annual turnover

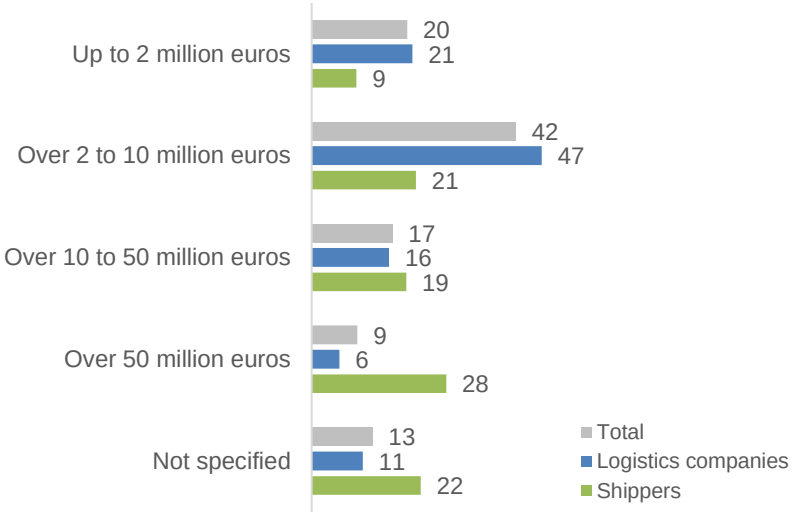
Of the logistics companies, especially small businesses with 10-49 employees (59%) and companies with an annual turnover of more than 2 to 10 million euros (47%) in 2023 took part in the survey (see Fig. 4/5). The percentage of microenterprises (with up to 9 employees) involved in goods transport by road is below average (9%). Among shippers, the number of small, medium-sized and large companies that took part in the survey is fairly even in terms of the number of employees and the annual turnover for 2023.

Figure 4: How many employees does your company have?



Question 17; basis: total: n=566, logistics companies: n=458, shippers: n=98; figures in percent; note: IT service providers are included in the total number but are not shown separately due to their limited number.

Figure 5: How high was your company's annual turnover in 2023?

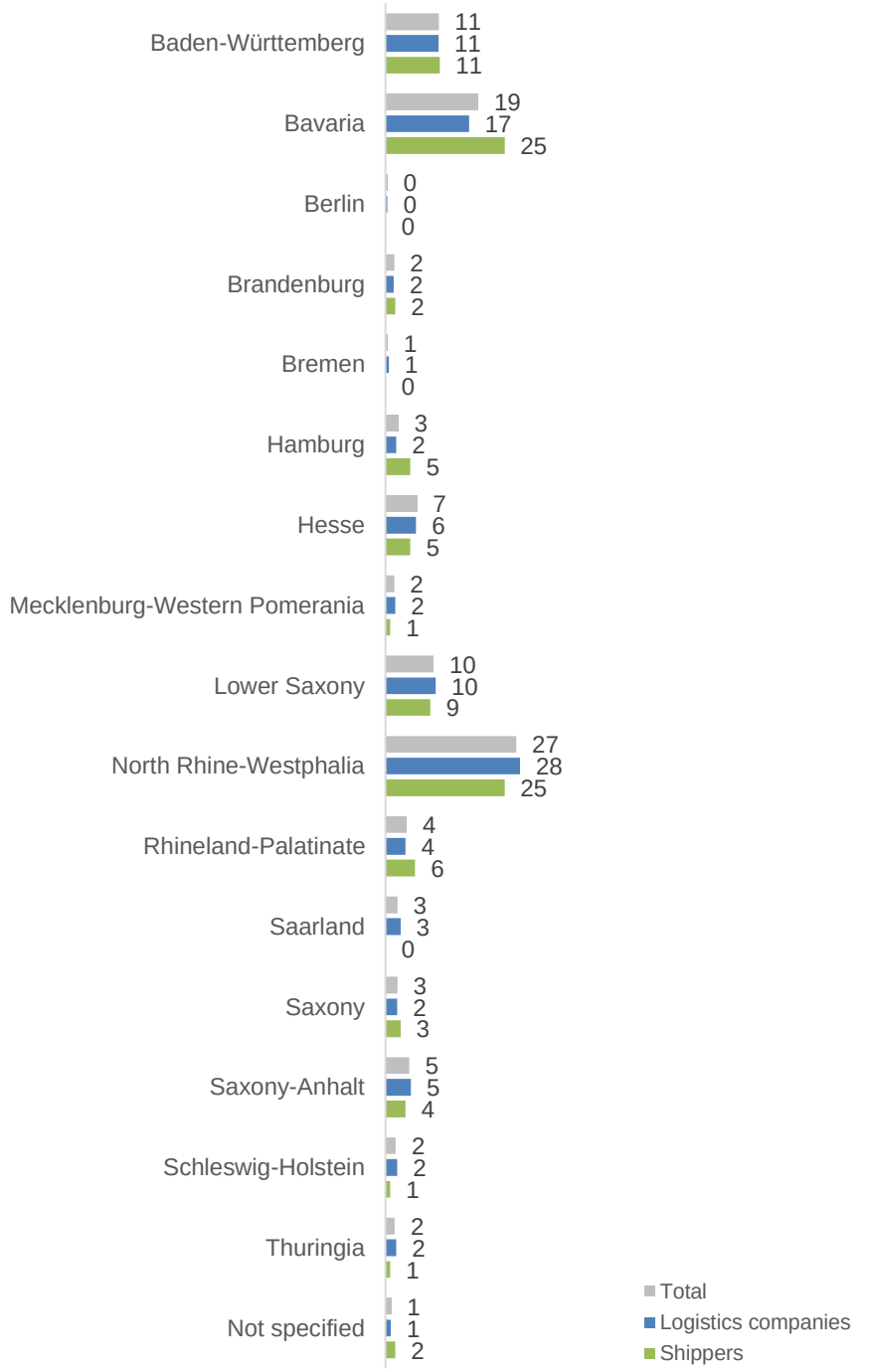


Question 18; basis: total: n=566, logistics companies: n=458, shippers: n=98; figures in percent; note: IT service providers are included in the total number but are not shown separately due to their limited number.

Head office

The head offices of the companies surveyed are located primarily in North Rhine-Westphalia (27%; logistics companies: 28%, shippers: 25%), Bavaria (19%; logistics companies: 17%, shippers: 25%), Baden-Württemberg (11%; logistics companies: 11%, shippers: 21%) and Lower Saxony (10%; logistics companies: 10%, shippers: 9%) (see Fig. 6.).

Figure 6: In which federal state is your company's head office located?



Question 19; basis: total: n=566, logistics companies: n=458, shippers: n=98; figures in percent; note: IT service providers are included in the total number but are not shown separately due to their limited number.

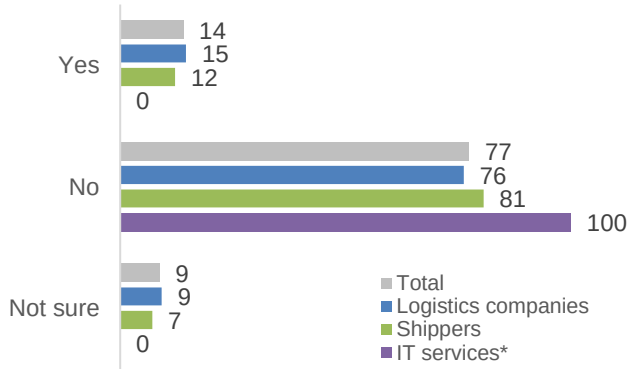
3 eFTI Regulation

3.1 Level of awareness and familiarity

Level of awareness

About 77% of the companies surveyed stated that they had not heard of the EU Regulation on electronic freight transport information (eFTI) prior to the survey, while just under 9% were unsure (see Fig. 7). Only about 14% had already heard of the eFTI Regulation, with the share of logistics companies slightly higher than that of shippers. None of the IT service providers surveyed had heard of the eFTI Regulation before. Companies with 50 or more employees are more likely to have heard of the eFTI Regulation than smaller companies.

Figure 7: Had you already heard of the EU Regulation on electronic freight transport information (hereinafter referred to as eFTI) prior to this survey?

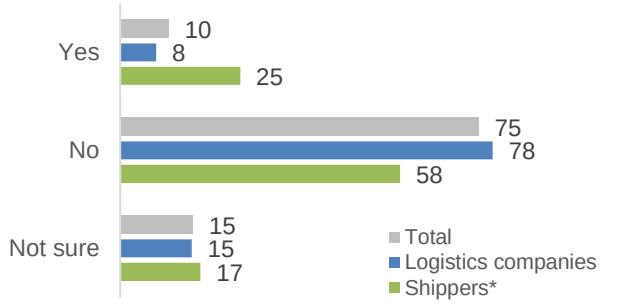


Question 6; basis: total: n=566, logistics companies: n=458, shippers: n=98, IT services: n=10 (*please note the small number!); figures in percent.

Level of familiarity with the eFTI Regulation, if aware of it

Of the companies that had already heard of the eFTI Regulation, only every tenth company – or just over 1% of the total number of companies surveyed – feels quite familiar with it (see Fig. 8). Three quarters do not feel very familiar with the eFTI Regulation, while 15% are unsure. Shippers are somewhat more likely to be more familiar with the eFTI Regulation than logistics companies (25% vs 8%).

Figure 8: Do you feel quite familiar with the eFTI Regulation?



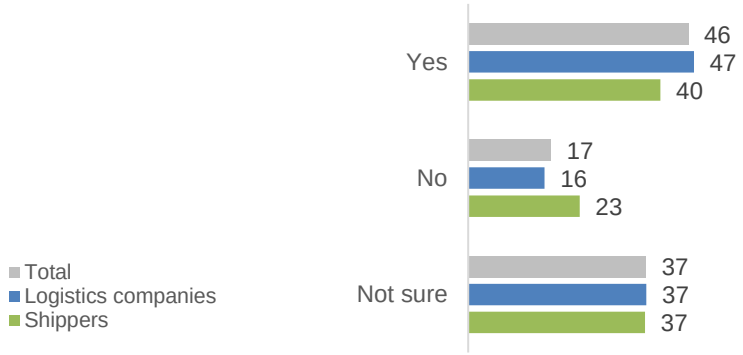
Question 7; basis: total: n=79, logistics companies: n=67, shippers: n=12 (*please note the small number!), **filter: only companies that have already heard of eFTI**; figures in percent

3.2 Willingness to use eFTI

Willingness to provide electronic freight transport information

Nearly all companies that are already aware of the eFTI Regulation and feel quite familiar with it intend to provide freight transport information electronically to authorities in the future. Of the companies that had not heard of the eFTI Regulation prior to the survey or are unsure or have heard of it but do not feel very familiar with it, slightly less than half (46%) are generally prepared to provide freight transport information electronically to authorities (see Fig. 9). Another 37% approximately are undecided; 17% are not prepared. Among the logistics companies, willingness to provide freight transport information electronically is slightly higher than among shippers; the same applies for companies with 50 or more employees compared with companies with fewer employees.

Figure 9: Would you generally be prepared to provide freight transport information to authorities electronically?



Question 11; basis: total: n=548, logistics companies: n=453, shippers: n=95, **filter: only logistics companies or shippers that have not yet heard of eFTI or are unsure and companies that have already heard of eFTI but do not feel very familiar with the Regulation**; figures in percent

Reasons for indecisiveness

There are a number of reasons why the companies surveyed are undecided as to whether to provide electronic freight transport information to authorities (see Fig. 10). Reasons given by about every second company are a possible dependence on software and IT service providers (53%), a general lack of knowledge (52%), uncertainties regarding investment costs (52%), legal consequences (52%) and acceptance by clients (50%) as well as data protection concerns (49%). Compatibility with existing platforms and systems (35%) and the risk of becoming a completely transparent company (34%) were further reasons given by about every third company. Reasons given less frequently in comparison were potential liability risks (28%) and poor internet connection (13%). In comparison with logistics companies, the reasons given by shippers included somewhat more frequently a general lack of knowledge (60% vs 51%) and somewhat less frequently a possible dependence on

software and IT service providers (43% vs 55%), uncertainties regarding investment costs (40% vs 55%) and uncertainties regarding the acceptance by clients (34% vs 53%).

Figure 10: Why are you undecided?

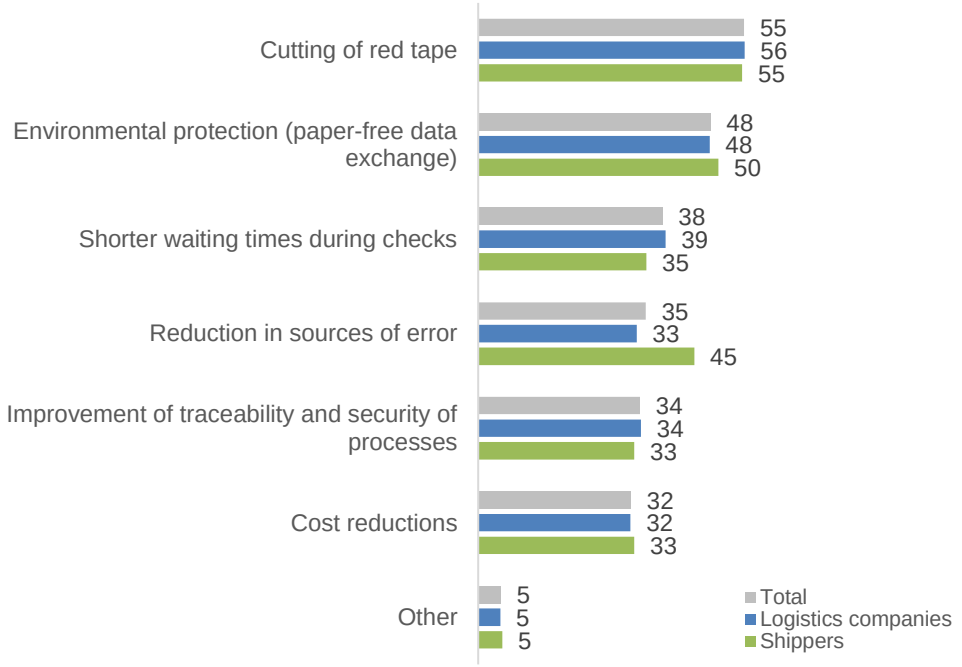
Question 12; basis: total: n=203, logistics companies: n=168, shippers: n=35, **filter: only companies that are undecided about providing electronic freight information to authorities**; multiple selection, figures in percent

3.3 Advantages and challenges

Reasons for using eFTI

The companies surveyed that already intend or at least would be willing to provide freight transport information to authorities electronically see the cutting of red tape in the company as the greatest advantage (55%), followed by environmental protection (48%) (see Fig. 11). In third place, logistics companies expect shorter waiting times during checks (39%), while shippers indicated a reduction in sources of error as a reason in favour of using eFTI (45%). Improving traceability and security of processes (34%) as well as cost reductions (32%) would be of greater relevance to about every third company.

Figure 11: What are the greatest advantages you see for your company in using eFTI?



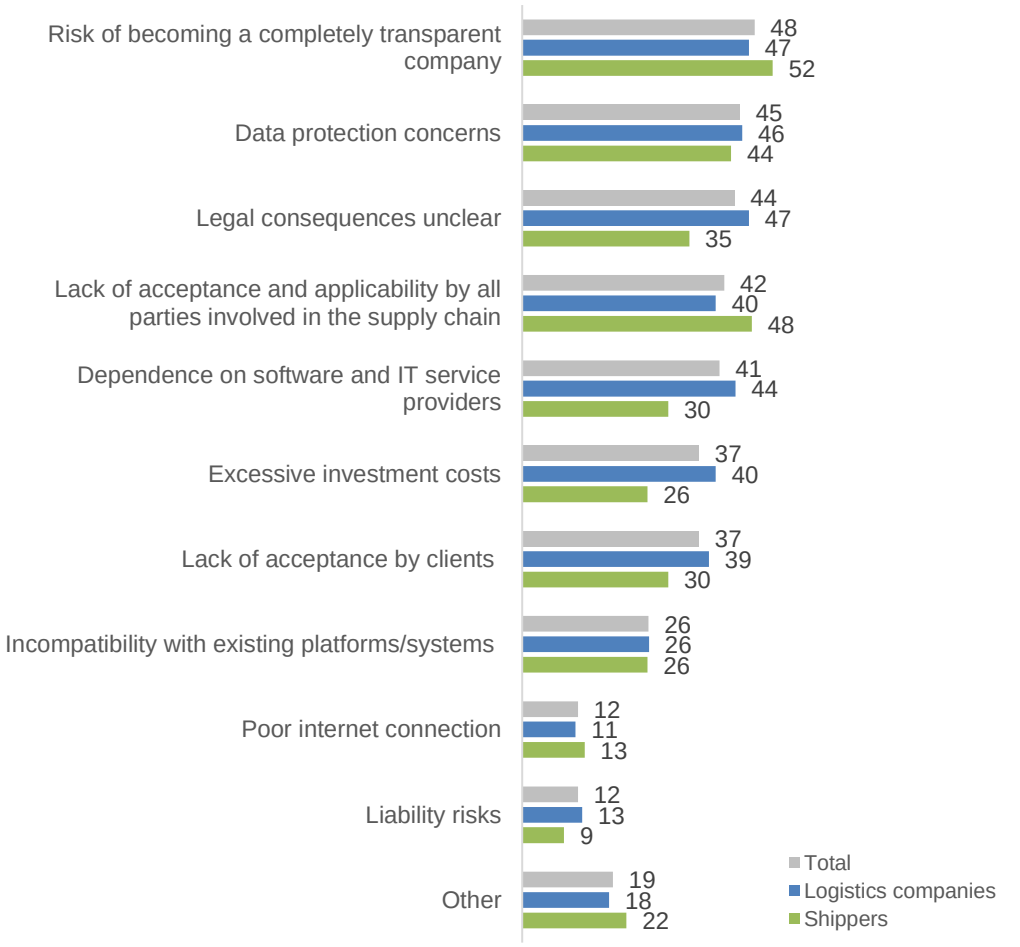
Question 13; basis: total: n=258, logistics companies: n=218, shippers: n=40, **filter: only companies that are planning or are willing to provide electronic freight information to authorities**; multiple selection (no more than 3 answers), figures in percent

Reasons against using eFTI

The companies that do not intend or are not willing to voluntarily provide electronic freight transport information to authorities gave a wide variety of reasons for this. The main reasons indicated by more than every third company include the risk of becoming a completely transparent company (48%), data protection concerns (45%), uncertainties regarding legal consequences (44%), lack of acceptance and applicability by all those involved in the supply chain (42%), dependence on software and IT service providers (41%), excessive investment costs (37%) as well as lack of acceptance by clients (37%) (see Fig. 12). In comparison, incompatibility with existing platforms and systems (26%), poor internet connection and liability risks (12% respectively) were reasons given less frequently. For the logistics companies surveyed, the uncertainties regarding legal consequences were more often a reason against using eFTI than for shippers (47% vs 35%); the same applies for the dependence on software and IT service providers (44% vs 30%), excessive investment costs

(40% vs 26%) and lack of acceptance by clients (39% vs 30%). For shippers, the risk of becoming a completely transparent company is a slightly more important factor than for logistics companies (52% vs 47%), which also applies for the lack of acceptance and applicability by all parties involved in the supply chain (48% vs 40%). Other reasons against providing electronic freight transport information include, in particular, the additional time companies fear this will entail as well as an increased administrative burden.

Figure 12: What are the main reasons for your company not to use eFTI?

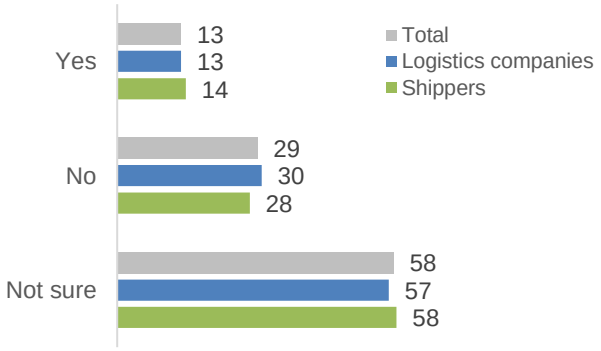


Question 14; basis: total: n=95, logistics companies: n=72, shippers: n=23, **filter: only companies that are not planning or are not willing to provide electronic freight information to authorities**; multiple selection (no more than 5 answers), figures in percent

Necessary governmental measures

About 13% of the companies surveyed consider accompanying governmental measures necessary for the implementation of the eFTI Regulation (see Fig. 13). In particular, they call for financial support, free training on how to implement the Regulation, definition of uniform standards and processes as well as a mandatory introduction for all industry stakeholders. More than half of the companies surveyed (58%) are unable to judge whether accompanying governmental measures are necessary; about 29% are against such measures.

Figure 13: Do you consider accompanying governmental measures necessary for implementing the eFTI Regulation?



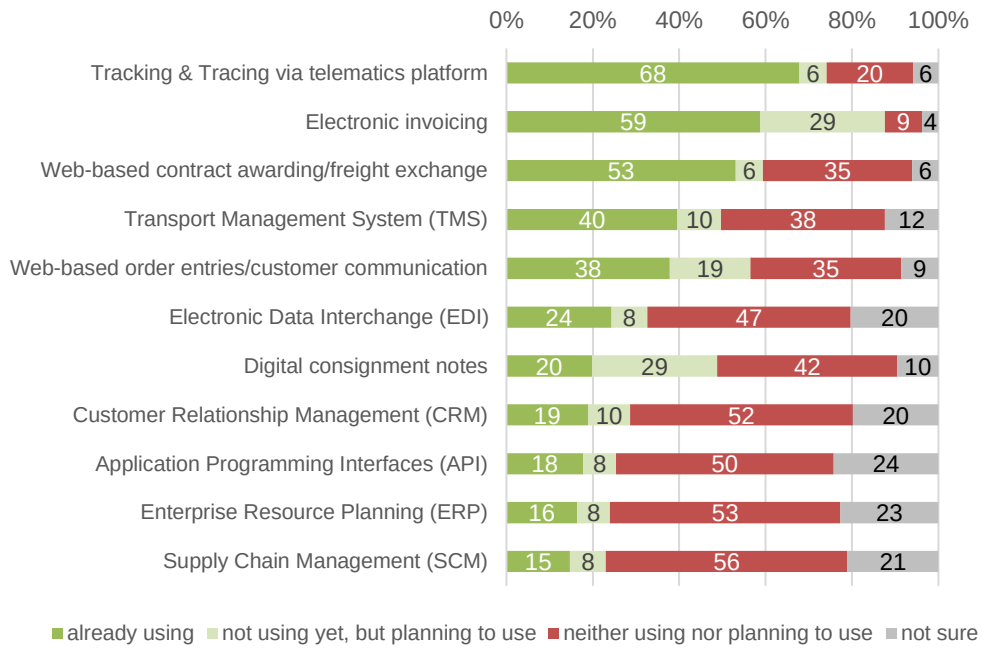
Question 15; basis: total: n=566, logistics companies: n=458, shippers: n=98; figures in percent; note: IT service providers are included in the total number but are not shown separately due to their limited number.

4 Level of digitalization within the company

Current use of and plans to use ICT

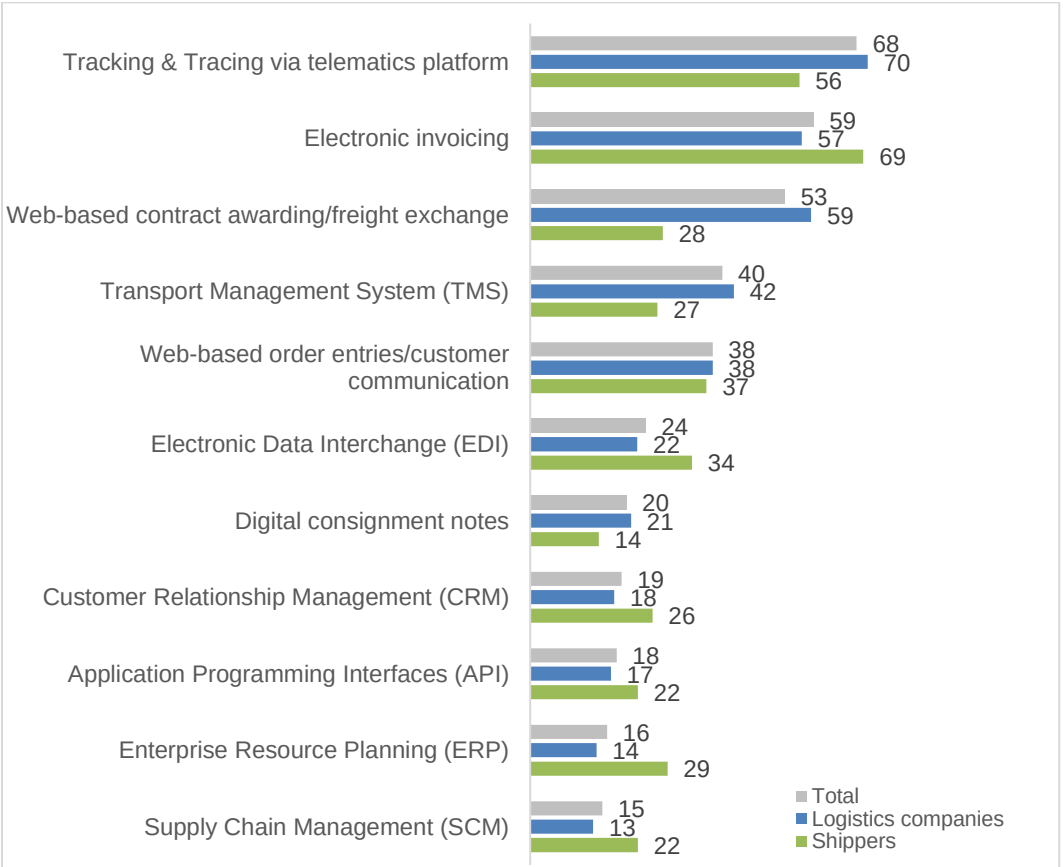
The extent to which the companies surveyed use modern information and communications technologies (ICT) varies greatly. Of the companies surveyed, just under 68% use tracking and tracing via telematics platforms (see Fig. 14). The logistics companies surveyed use the technology more frequently than shippers (70% vs 56%, see Fig. 15). Slightly more than half of the companies surveyed (59%) issue electronic invoices; shippers do so somewhat more frequently than logistics companies (69% vs 57%). Almost another 29% of the companies surveyed are planning to issue electronic invoices. The third most used technology (53%) among the companies surveyed is web-based contract awarding/freight exchange, primarily by logistics companies (59% vs 28% by shippers). Almost 40% of the companies surveyed currently use transport management systems (TMS). Logistics companies use these more than shippers (42% vs 27%). Systems for web-based order entries/customer communication, however, are used to an equal degree by shippers and logistics companies. In total, almost 38% of the companies surveyed already use this technology, while almost another 19% are planning to use it. Technologies less frequently used in comparison include electronic data interchange (EDI) (24%), digital consignment notes (20%), customer relationship management (CRM) (19%), application programming interfaces (API) (18%), enterprise resource planning (ERP) (16%) and supply chain management (SCM) (15%). With the exception of digital consignment notes, these technologies are more frequently used by shippers than by logistics companies. The technology that the highest percentage of companies is planning to use is digital consignment notes (about 29%). In general, the survey shows that the higher the number of employees, the more the companies surveyed are likely to use the technologies mentioned above (see Fig. 16). This finding is consistent with surveys conducted by the Federal Statistical Office on the use of information and communications technologies in the ‘transport, warehousing, postal, courier and express services’ sector. Some important findings of these surveys are described in the annex.

Figure 14: Which of the following communication and information technologies are you already using or planning to use in your company?



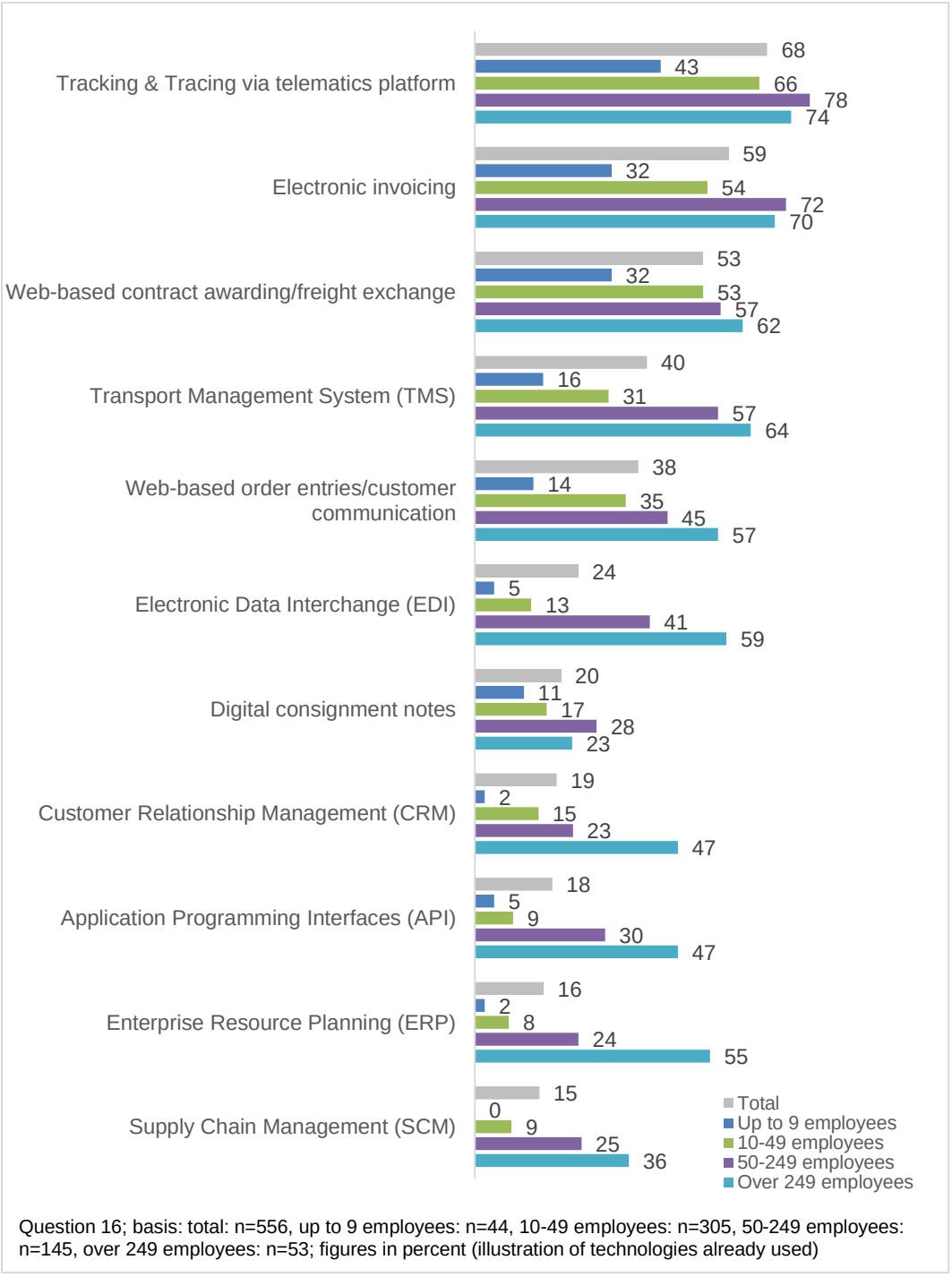
Question 16; basis: n=556; figures in percent; note: Due to rounding, the sum of the individual bars do not always add up to exactly 100%.

Figure 15: Which of the following communication and information technologies are you already using or planning to use in your company? (illustration of the communication and information technologies already used in the company)



Question 16; basis: total: n=556, logistics companies: n=458, shippers: n=98; figures in percent (illustration of technologies already used)

Figure 16: Which of the following communication and information technologies are you already using or planning to use in your company? (illustration of the communication and information technologies already used in the company)



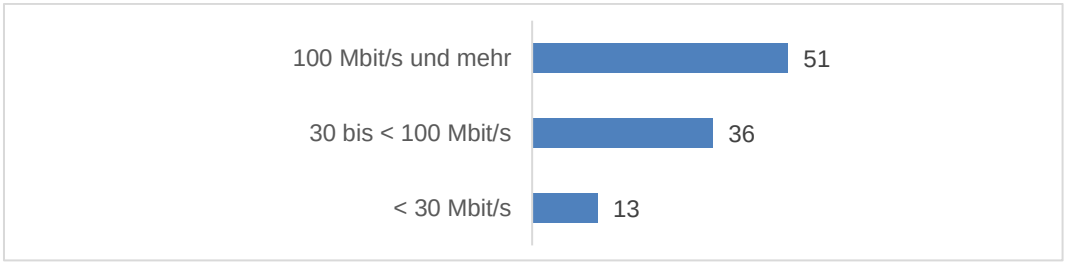
Question 16; basis: total: n=556, up to 9 employees: n=44, 10-49 employees: n=305, 50-249 employees: n=145, over 249 employees: n=53; figures in percent (illustration of technologies already used)

5 Annex: Use of communication and information technologies in companies in the ‘transport, warehousing, postal, courier and express services’ sector

Fast internet

According to the Federal Statistical Office, about 98% of all German companies in the ‘transport, warehousing, postal courier and express services’ sector had internet access in 2023. The percentage for companies with at least 10 employees was about 100%. About 88% of all companies had fixed internet connection. Of these, about 87% had fast internet with a contractually agreed data transmission rate of at least 30 Mbit/s; about 13% had a lower data transmission rate (see Fig. 17). For companies, a fast and effective internet connection is a key prerequisite for using modern digital applications and services.

Figure 17: Data transmission rate 2023 – percentage of the companies in the ‘transport, warehousing, postal, courier and express services’ sector with fixed internet connection



Source: Federal Statistical Office

ERP software

Table 1 shows the percentage of the companies in the ‘transport, warehousing, postal, courier and express services’ sector using selected information and communications technologies in 2023. According to this, only about 15% of all companies were using enterprise resource planning (ERP) software; in companies with at least 10 employees, the percentage was about 31%. In companies with 250 and more employees, use of ERP software was significantly higher (78%) than in companies with 50 to 249 employees (52%) and companies with 10 to 49 employees (24%). ERP software is used by companies to manage and control their resources through the exchange of information between different functional areas (e.g. accounting, planning, production, marketing). ERP software can be standard software that is adapted to the company’s needs or software the company has developed itself.

Table 1: Use of selected communication and information technologies in companies in the ‘transport, warehousing, postal, courier and express services’ sector in 2023

Technology	Use in % in all legal entities
Internet access	98
Electronic invoices (cannot be automatically processed)	59
Website	53
Use of cloud computing (cloud services)	23
Data exchange	21
Use of ERP software	15
Electronic invoices (can be automatically processed)	15

Source: Federal Statistical Office

Cloud computing

Cloud computing and cloud services are used more frequently in larger companies than in smaller companies. In 2023, while about 80% of companies in the ‘transport, warehousing, postal, courier and express services’ sector with 250 and more employees had access to IT services of external IT infrastructures via internet-based networks, including virtual private networks (VPN), this was only the case for 57% of companies with 50 to 249 employees and only for 30% of companies with 10 to 49 employees. Relative to all companies in the ‘transport, warehousing, postal, courier and express services’ sector, the percentage of users in 2023 was about 23%.

Data exchange

About 21% of companies in the ‘transport, warehousing, postal, courier and express services’ sector exchanged data electronically with suppliers or customers along the supply chain via websites, networks or other electronic data exchange means in 2023. For companies with 250 and more employees, the percentage was about 72%, for companies with 50 to 249 employees about 50%, and for companies with 10 to 49 employees about 31%.

Electronic invoicing

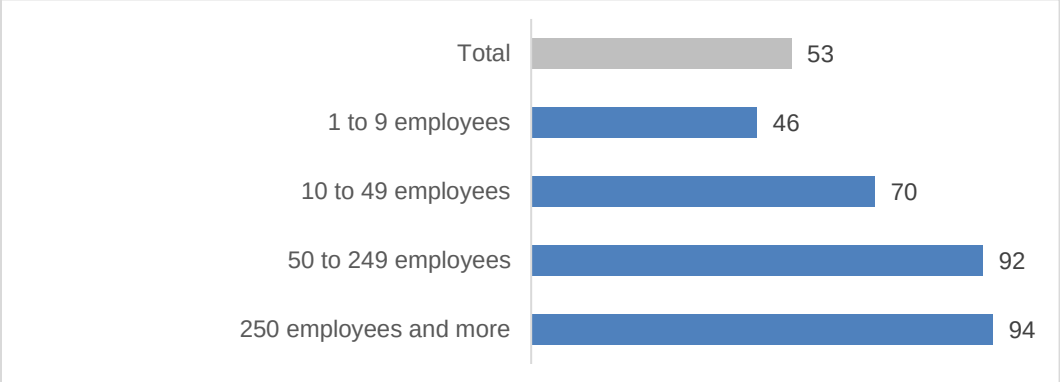
In 2023, only about 15% of all companies in the ‘transport, warehousing, postal, courier and express services’ sector issued electronic invoices in a standardized structure that can be automatically processed (e.g. via EDI). In such cases, the invoice details can be directly transferred from the sender’s billing system to the recipient’s accounting system. For companies with 250 and more employees, the percentage was about 57%, for companies with 50 to 249 employees about 32%, and for companies with 10 to 49 employees about 19%. In comparison, the percentage of companies issuing electronic invoices in an unstructured format that cannot be automatically processed (e.g. e-mails, e-mail attachments in PDF or JPEG format) was higher. For companies with 1 to 9 employees, the percentage was about 53%, for companies with 10 to 49 employees about 75%, for companies with 50 to 249 employees about 84%, and for companies with 250 and more employees about 87%.

Relative to all companies in the ‘transport, warehousing, postal, courier and express services’ sector, the total percentage in 2023 was about 59%.

Website

Figure 18 shows the percentage of companies in the ‘transport, warehousing, postal, courier and express services’ sector that have their own website. Websites considered as such are websites that the companies are able to design themselves. It is irrelevant here whether these websites are provided using the company’s own IT infrastructure or using an external one. In 2023, about 53% of all companies had their own website. For companies with 1 to 9 employees, the percentage was about 46%, for companies with 10 to 49 employees about 70%, for companies with 50 to 249 employees about 92%, and for companies with 250 and more employees about 94%.

Figure 18: Companies in the ‘transport, warehousing, postal, courier and express services’ sector with their own website according to number of employees in 2023, in %



Source: Federal Statistical Office

Structure of commercial road haulage companies

As the examples above illustrate, companies with a higher number of employees are usually more likely to use various information and communications technologies. However, it is primarily small businesses and microenterprises that are active in the German road haulage industry. According to the most recent business statistics of the Federal Statistical Office (as at November 2020), about 64.3% of the 46,902 commercial road haulage companies in Germany had fewer than 10 employees; about 30.6% had 10 to 49 employees and about 5.1% had 50 and more employees.