



**moving**

International Road Safety Association e.V.

**For professional  
and advanced  
driver training**





## We are convinced that good, sustainable driver training can happen only in professional and well-equipped driving schools.

Driving training conducted by driving schools is the cornerstone of road safety.  
MOVING stands up for modern driving training that road users can profit from all their lives.

MOVING pools the interests of European publishers specialising in transport and companies active in the field of training for driving licences. MOVING would like to promote education and training in the areas of road safety, road traffic training and road traffic education and thus contribute towards road safety. Many people are still killed on the roads of Europe everyday: Over 25,500 people died on the roads of Europe in 2016 and more than 135,000 were seriously injured in road traffic. Apart from the suffering of the victims and their loved ones this also extracts enormous costs for the society. The EU aims to reduce the number of traffic deaths by half by the year 2020 with a series of measures. Although Germany was able to significantly reduce the number of road deaths in the past decade, the number has shown no great improvement in the past few years, as it did earlier.

All people involved in road traffic must be integrated in possible traffic policy measures to increase road safety. After all, road safety depends on the people involved and the behaviour of those participating in road traffic. Even the best technical measures and facilities must be used and accepted by people to be effective. The infrastructure as well as the vehicles must be designed to be road user-friendly for this purpose.

A very important foundation for "correct" behaviour on the road is already laid during the traffic education and later during the driver training in the driving school. New technical developments, the demographic development in Germany and increasing requirements with regards to environmental protection will significantly change the mobility of today. This will also redefine the requirements related to road users and it will be necessary to

optimise driver training. We are convinced that a sustainable and good driving training can take place only in professional and very well-equipped driving schools. MOVING strongly supports modern driver training from which all students of driving schools and road users can profit.

Teaching in driving schools should be optimally tailored to the needs of the customers and supported with modern teaching and learning aids as well as other services. We advocate a customisation and modernisation of the training provided to driving instructors. The general economic conditions must also be improved to make driving schools fit for the future and make the profession of driving instructors attractive again.



The Executive Board has 3 members:  
President Jörg-Michael Satz, Vice President Ina Giljohann and Vice President Peter Lehnert.

The members of the Executive Board bring their years of experience in the driving school sector as experts in national and international working groups and participate in current discussions, e.g., by creating points of view/opinions and reading papers in conferences. Their work is regularly harmonised with all members of the interest group. This allows pooling experiences from six European countries.



President  
Jörg-Michael Satz



Vice President  
Ina Giljohann



Vice President  
Peter Lehnert

### Members

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## A view of the future – the driving school of the future

**MOVING** considers itself to be an industry observer. We keep an eye on the newest trends and developments and identify problems and potential for optimisation for the general conditions of driving schools.

Driving schools will develop into mobility service providers. They will become competency centres for mobility and mobility consultants for novice drivers, frequent drivers, seniors, parents and differently abled persons. The explanation of driver assistance systems and instruction on special requirements in case of vehicles with alternative drive technologies will be another important component. Furthermore, we work on the question of how to convince more youngsters to take up the profession of driving instructors and becoming

financially successful and independent with a driving school. We discuss with experts and regularly create an industry overview.

### **Lifelong learning – Lifelong further education**

Anyone passing the class A or B driving licence test acquires a driving licence for the rest of his life. But is a driving licence that is valid lifelong in line with the times today? Regular further training is already mandatory in many professions including that of driving instructors and professional drivers

**How can driving schools continue to work profitably in the future? How can the quality of the teaching be improved? Which new business models are suitable for driving schools?**

to keep their skills and knowledge updated. Learning rules and behaviours that are relevant for transport should not stop after passing the driving test. Lifelong learning is a concept that contributes to every road user by refreshing his knowledge regularly individually and adjusting his behaviour to the benefit of an optimised traffic flow. MOVING supports this concept.

### **MOVING supports the “Vision Zero” strategy**



The objective of “Vision Zero” is to prevent deaths and serious injuries on roads. We in Europe are still very far away from this objective despite our best efforts. People die on the roads every day. All our efforts to improve driving training have the target of making the use of roads and transportation so safe for all users that there are no more deaths and serious injuries on the roads.

## Our key topics

### **Optimising driving training**

Good training provided to driving students plays a key role in improving road safety. Driving simulators can contribute to supporting the driving training.

### **Shortage of driving instructors**

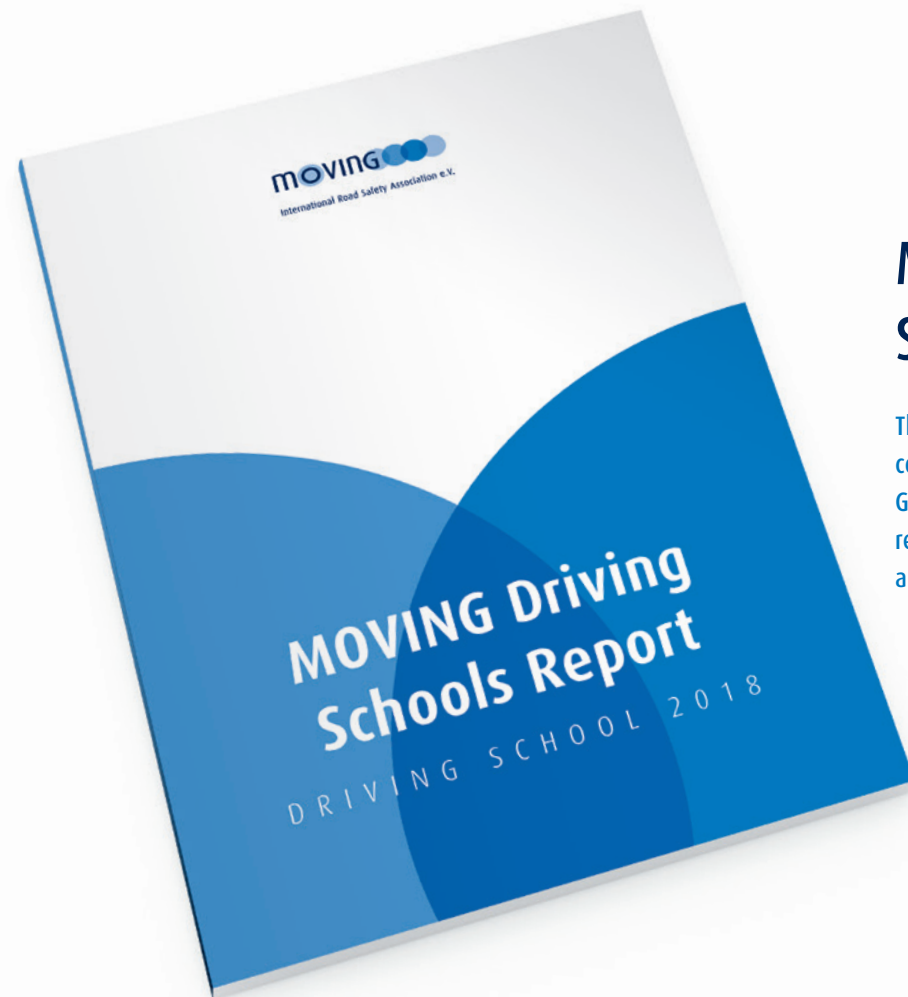
In Germany, we are already facing a dearth of driving instructors. Driving schools have to give up revenue, because they cannot find appropriate personnel. The average age of German driving instructors is over 53 years and is steadily increasing. The shortage of driving instructors is one of the greatest challenges facing the industry. The objective must be to make the profession attractive and strengthen the image of the industry. The number of young professionals must increase again.

### **Professional drivers**

The education and training of professional drivers must be improved. A key requirement is the creation of a Europe-wide central register to combat illegal certificates of continual training. Other topics are the continuing training of training staff as well as the designing of the course and considering the question if an evaluation of successful learning is meaningful at the end of a course.

### **Optimising the driving instructor trainings**

The 2018 reform of the Driving Instructors Law was a first step in the right direction. Driving instructor training must be modernised and customised to the needs of the students of driving schools and new forms of mobility.



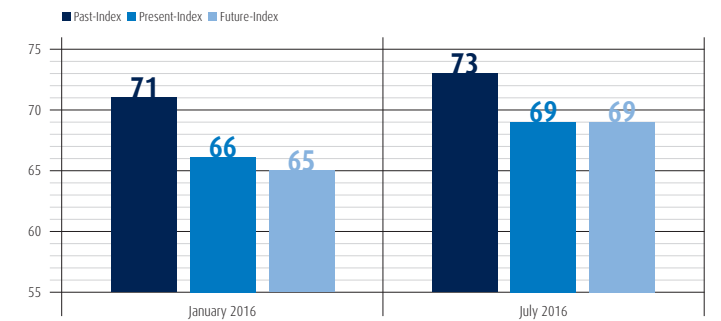
## MOVING Driving Schools Report

The MOVING Driving Schools Report consolidates the data available on the German driving School industry. The report is published every two years and a summary is also available in English.

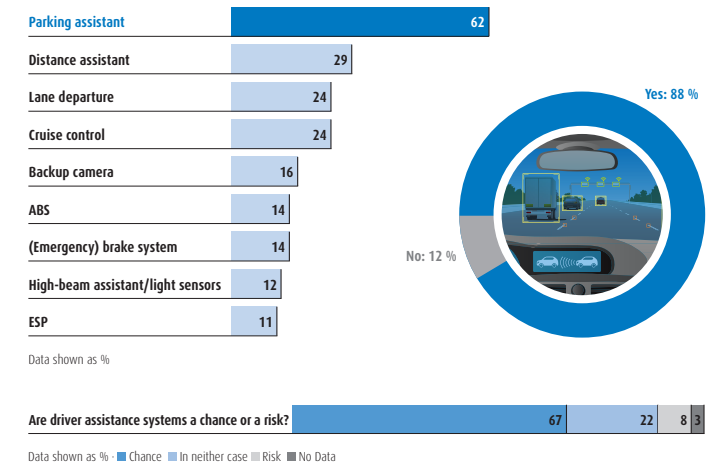
## MOVING FAHRSCHUL-KLIMA-INDEX

With the driving school climate index, we have created an instrument to map the business situation and the mood of driving school companies in Germany every year. The MOVING driving school climate index is composed of the different results from current and future as well as past situations that together highlight the mood of the driving school industry. Dynamic questions on trends and current topics are also raised regularly.

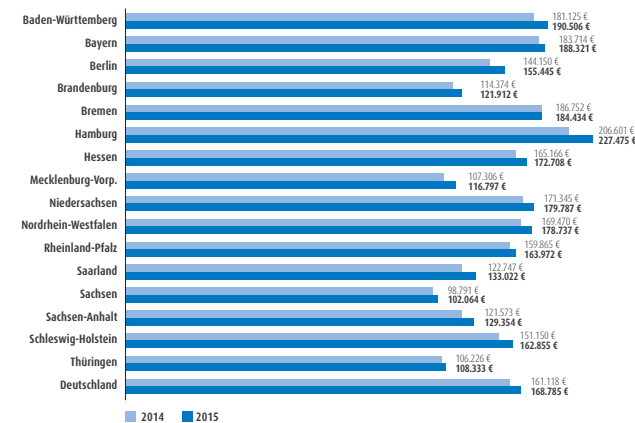
### MOVING DRIVING SCHOOL CLIMATE INDEX



### DRIVER ASSISTANCE SYSTEMS OVERVIEW



### Turnover per company



Source: Statistisches Bundesamt, Wiesbaden 2017, Umsatzsteuerstatistik 2015 and own calculations

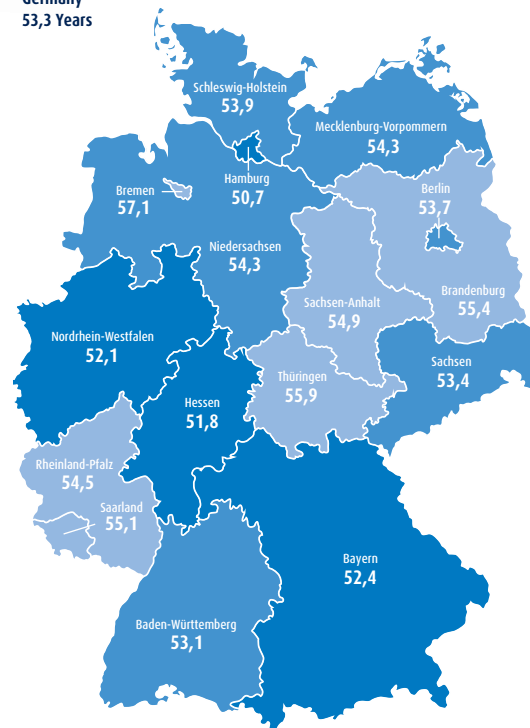
### Number of driving school companies according to turnover size classes

Großenklassen Umsatz	Steuerpflichtige Anzahl	Umsatz in 1.000 Euro	Anteil	
			an der Anzahl	am Umsatz
17.500 - 50.000	2.119	73.310	18,58 %	3,81 %
50.000 - 100.000	3.405	250.432	29,85 %	13,01 %
100.000 - 250.000	4.019	631.045	35,23 %	32,78 %
250.000 - 500.000	1.339	456.257	11,74 %	23,70 %
500.000 - 1 Mio.	401	267.070	3,52 %	13,87 %
1 Mio. - 2 Mio.	90	118.357	0,79 %	6,15 %
2 Mio. - 5 Mio.	26	75.481	0,23 %	3,92 %
5 Mio. - 10 Mio.	8	53.378	0,07 %	2,77 %
Summe	11.407	1.925.330	100 %	100 %

Source: Statistisches Bundesamt, Wiesbaden 2017, Umsatzsteuerstatistik 2015 and own calculations

### Average age of German driving instructors

Germany  
53,3 Years



Source: Kraftfahrt-Bundesamt, Flensburg 2017 and own calculations

Competitive pressure has reduced.

63

23

How did competitive pressure in the industry develop?

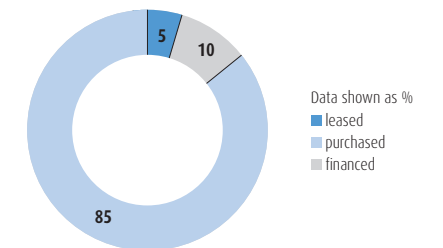
Data shown as %  
■ reduced  
■ remained constant  
■ increased

Source: MOVING 2017

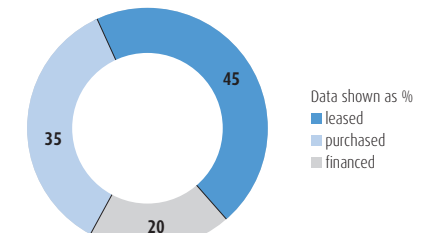
On average, each driving school has about 3,6 cars, 4,7 motorcycles and 1,1 trucks for the training. The cars are about 2,1 years old and mostly (45%) leased.

Source: MOVING 2017

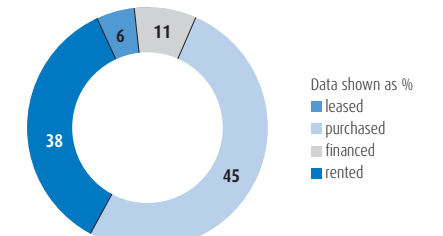
Number of motorcycles: Ø 4,7  
Age of motorcycles: Ø 3,7



Number of cars: Ø 3,6  
Age of cars: Ø 2,1



Number of trucks: Ø 1,1  
Age of trucks: Ø 6,9





# The MOVING-Expert Forum

Once a year, MOVING invites representatives of policy, driving schools, the automobile industry and other interested parties to the expert forum in Berlin to jointly debate on the future challenges for driving schools.



## Industry information

MOVING collects and analyses data of the driving school industry. MOVING presents the newest developments and trends of the industry at numerous events. Together with other industry experts MOVING develops requirements related to policy from the subsequent discussions.

Along with the driving school climate index, which appears half-yearly and the regularly updated industry report, MOVING publishes "Facts of the month" every month as well as other results on actual topics under the "Survey of the month", among other things.



## FAKTEN DES MONATS FEBRUAR 2018

**Zitat des Monats**  
„Fahrlehrer der Ausbildungsklassen C und D verdienen durchschnittlich 7,6 % mehr als ihre Kollegen der Ausbildungsklasse B.“  
Jörg-Michael Satz Präsident MOVING Road Safety Association International e. V.

### Tätigkeitsfelder: Lohn der angestellten Fahrer für LKW (Theorie und Praxis)

Nur Fahrschulen, die Führerscheinklasse C anbieten, Maximal- und Minimalwerte, Basis: n=158

REGION	Kleinstadt	15,13 €
REGION	Großstadt	16,55 €
GRÖSSE	Kleine Fahrschule	21,17 €
GRÖSSE	Mittlere Fahrschule	14,31 €
REGION	Nord	17,11 €
REGION	Ost	14,58 €
Lohn für 45 Min. praktische Fahrstunde durchschn.:		15,63 €
REGION	Ländliche Gegend	16,86 €
REGION	Großstadt	14,09 €
GRÖSSE	Kleine Fahrschule	16,67 €
GRÖSSE	Mittlere Fahrschule	14,31 €
REGION	Süd	16,59 €
REGION	Ost	13,75 €
Lohn für 45 Min. Theorie-stunde durchschn.:		15,68 €

### Tätigkeitsfelder: Lohn der angestellten Fahrer für Bus (Theorie und Praxis)

Nur Fahrschulen, die Führerscheinklasse D anbieten, Maximal- und Minimalwerte, Basis: n=104

REGION	Ländliche Gegend	17,00 €
REGION	Kleinstadt	14,84 €
GRÖSSE	Mittlere Fahrschule	14,38 €
GRÖSSE	Sehr große Fahrschule	16,20 €
REGION	West	16,29 €
REGION	Ost	14,71 €
Lohn für 45 Min. praktische Fahrstunde durchschn.:		16,00 €
REGION	Ländliche Gegend	15,89 €
REGION	Kleinstadt	15,16 €
GRÖSSE	Große Fahrschule	14,88 €
GRÖSSE	Sehr große Fahrschule	15,43 €
REGION	Süd	15,67 €
REGION	West	15,06 €
Lohn für 45 Min. Theorie-stunde durchschn.:		15,16 €

**Legende für beide Grafiken:** Kleine Fahrschule mit 1-2 Mitarbeitern - Mittlere Fahrschule mit 3-4 Mitarbeitern - Große Fahrschule mit 5-10 Mitarbeitern  
- Sehr große Fahrschule mit mehr als 10 Mitarbeitern - Ländliche Gegend - Kleinstadt bis 20.000 Einwohner - Mittelgroße Stadt bis 100.000 Einwohner  
- Großstadt/Einzugsgebiet über 100.000 Einwohner

\* Der durchschnittliche Lohn für eine B-Ausbildungseinheit beträgt 14,62 €. Siehe dazu auch die Fakten des Monats 01/2018.

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Sie erhalten weitere Zahlen & Fakten auf [www.moving-roadsafety.com](http://www.moving-roadsafety.com) dazu einfach QR-Code scannen.

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## Professional drivers

**The Professional Drivers Qualification Act that regulates the mandatory continuing training of professional drivers in Germany, causes abundant implementation problems in practice. Around 40 experts meet regularly in a work group under the aegis of MOVING, to formulate joint recommendations for the lawmakers. The first joint recommendations have already been submitted to the Federal Ministry for Transport.**

One of the requirements includes the wish for introducing a central register to create transparency with respect to recognised trainers, enabling effective controls, as well as managing participants. This should also prevent the recognition of certifications obtained illegally. Furthermore, nation-wide standardisation should be ensured in controlling

training centres. Regular continual education of trainers must be ensured. Another requirement suggests introducing a criteria catalogue for trainers, which should serve as basis for recognition of trainers. Moreover, the introduction of learning target controlling in continuing education should be analysed.

The German Professional Driver Qualification Act has, in the meantime, been reformed. The European Commission too has recently revised the directive for professional driver qualification. The changes include a modernisation and simplification of training and continuing education by using e-learning and simulator training, among other things. Moreover, the reform intends to set up a system for electronic exchange of data on the qualifications of drivers, similar to the central register demanded by MOVING.

MOVING is actively involved in the discussion and is accompanying the process. We are encouraging the enhancement of mandatory continuing education for professional drivers of transporters in Europe. Professional drivers of small transport vehicles, i.e., vehicles between 2.8 and 3.5 t (e.g., courier services), are demonstrably more frequently involved in accidents, and are more often the primary perpetrators. They should therefore be included in the mandatory continuing education.

Jörg-Michael Satz (centre) with Gerhard Grünig, Verkehrsrundschau (left) and Jürgen Kopp, 1. Chairman of the Driving Instructors Association of Bavaria, and 2. Deputy Chairman of the BVF (right)



Photo: © Thomas Cyganek

## The work of MOVING



# MOVING

International Road Safety Association e. V.

### MOVING working groups

We hold in-depth discussions on the topics of driving training, driving instructor training, and professional driver qualifications in our own work groups.

- » BKF-Sitzungsreihe ad hoc-AG BKF (series of ad hoc BKF-meetings – AG BKF)
- » AG Fahrlehrerausbildung (Driving instructor training)
- » AG Curriculum für die Fahrausbildung (Curriculum for driving instruction)

### Expertise

Furthermore, MOVING regularly presents points of view on current topics and legislative proposals. The President has already been invited several times as an expert for hearings in the Transport committee of the German parliament, to address the questions of the representatives. MOVING is a member of various work groups, “Hochrisikophase Fahranfänger” (High risk phase of novice drivers) (BAST) and “Strategie Automatisiertes und Vernetztes Fahren” (Strategy for automated and connected driving) (BMVI) among others. MOVING was able to enrich countless events with quality talks and contributions to discussions on the German driving school market and the training and continuing education of professional drivers, at the BKF-Symposia at Kassel and Gladbeck, among others.

### International work

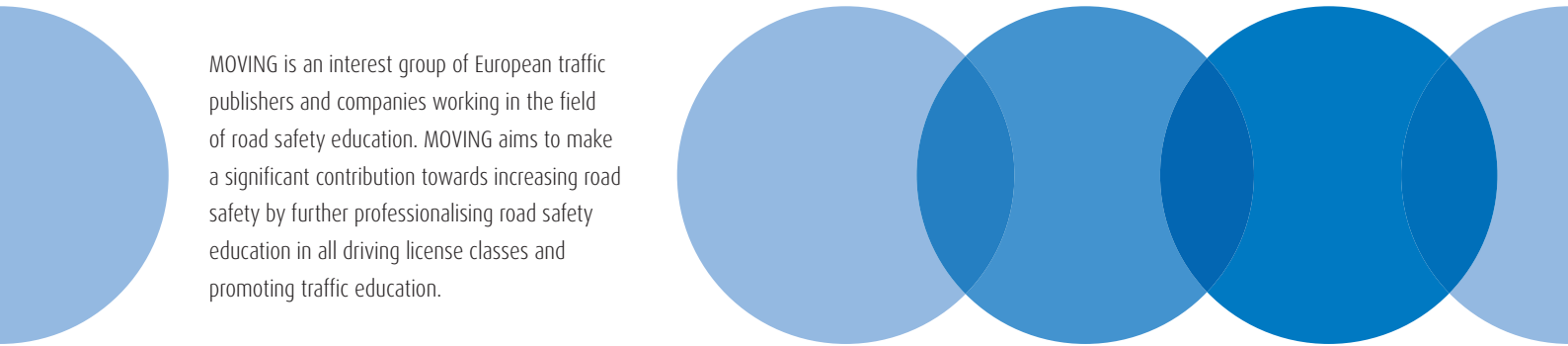
MOVING works with several organisations, associations and societies at the European level and is a member of CIECA and ETSC. MOVING participates in international projects and experts rounds and fights for professional driving training across Europe.



### Other activities and projects

Along with the studies mentioned above, MOVING has published other studies, surveys and expert opinions on current topics and participated in technical discussions.

- » Study on the integration of driving simulators in driving training
- » Surveys among driving school students about selection criteria while searching for driving schools and suggestions for improvement for the driving training from customer perspective
- » Expert opinion on VAT exemption for driving schools
- » Expert opinion for conversion of the legal form of driving schools
- » Training guides for cars and a draft for a new version of the FahrschAusbO
- » Co-organisation of a CIECA Workshop “Use of simulators and virtual reality (VR) in professional driver training and testing” 2017 in Munich
- » Study of the driving school density in Germany
- » Project “Customer Experience” with the Hochschule der Medien, Stuttgart (Stuttgart Media University)
- » Participation in the “UAG Fahrausbildung der AG Recht zur BMVI-Strategie Automatisiertes und Vernetztes Fahren” (UAG driving training of AG Act for BMVI Strategy for Automated and Connected Driving)
- » Participation in technical discussion on fuel-saving driving as part of the implementation of the action programme for Climate Protection 2020 and the Climate Protection Plan 2050 for the Transport industry
- » Supporting the Federal Environment Ministry

A decorative graphic consisting of four overlapping circles in shades of blue, arranged horizontally across the middle of the page. The circles overlap in a way that creates a continuous, wavy line of color.

MOVING is an interest group of European traffic publishers and companies working in the field of road safety education. MOVING aims to make a significant contribution towards increasing road safety by further professionalising road safety education in all driving license classes and promoting traffic education.

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Subject to modifications and errors