EUROPLATFORMS

European Association of Transport & Logistics Centres

Corporate Presentation

Final – October 2015

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WHAT IS A TRANSPORT & LOGISTICS CENTRE?

How do they look like?

CONCEPTUALIZATION

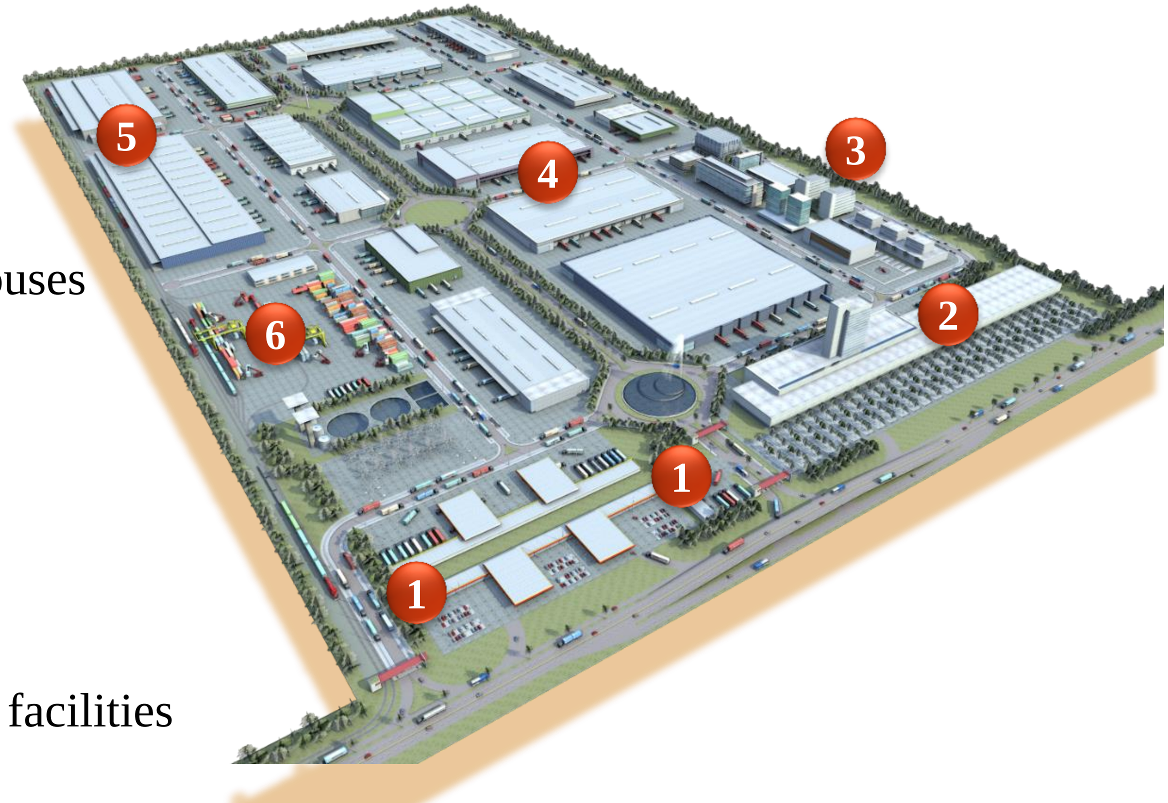
- Europlatforms defined time ago a **Transport & Logistics Centre (TLC)** as a:

> *"Centre in a defined area within which all activities relating to the transport, logistics and distribution of goods, both for national and international transit, are carried out by various operators on a commercial basis."*

- Some of its **key characteristics** are listed below:
  - It must comply with European standards and quality performance to provide the framework for commercial and sustainable transport solutions.
  - It is important that it is managed in a single and neutral legal body (preferably by a Public-Private-Partnership), in order to ensure synergy and commercial cooperation.
  - It must allow access to all companies involved in the activities set out above.
  - The operators can either be owners or tenants of buildings and facilities.
  - It must provide the required facilities, equipment and services to the users, as well as public services for the staff.
  - It should preferably be served by a multiplicity of transport modes (road, rail, sea, inland waterways, air).

GENERAL APPEARANCE

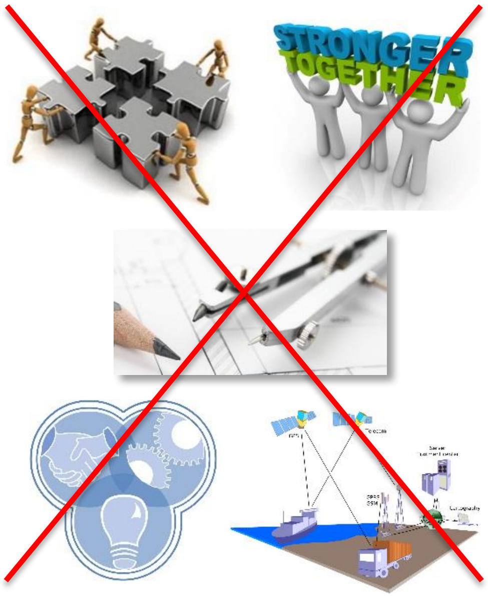
- Some of its key **“hard” elements** usually are:
  1. Access control
  2. Service area
  3. Business centre
  4. Transport & Logistics warehouses
  5. Intermodal warehouses
  6. Intermodal terminal
  - Others:
    - Inner roads
    - Green areas
    - Water and waste treatment facilities
    - Custom area
    - ……



WHAT IS "NOT" A TLC

- **Broadly** speaking:
  - Those <u>generalist spaces</u> that are not designed nor managed for the specific needs and benefit of transport and logistics activities (e.g., industrial parks/zones where Transport & Logistics operators have traditionally set up their facilities just because of the lack of appropriate and tailored TLCs).

- But **in particular**:
  - Those infrastructures that <u>lack of a central management model</u> delivered by any public and/or private legal body for the benefit of the T&L companies installed within them.
  - Those infrastructures and facilities that <u>lack of design standards</u> tailored to facilitate the development of transport and logistics activities (wide roads and manoeuvre areas, etc.).
  - Those developments that include just a few warehouses and/or logistics facilities and therefore <u>lack of capacity/ambition</u> to generate synergies and contribute to the T&L sector improvement and modernization.



What role and impact do they have?

KEY DIMENSIONS OF TLCs' ROLE

- TLCs play a **key role** in:
  - Providing tailored infrastructures, facilities and services to underpin and enhance the development of specialist activities within the Transport & Logistics (T&L) market.
  - Generating synergies, effectiveness and added value to T&L operators in comparison with traditional and generic industrial facilities.
  - Securing a more efficient connectivity with the main local, regional, national and trans-European transport networks (TEN-T).
  - Promoting the use of intermodal transport solutions when connecting long haul and the last mile transport services.
  - Serving cities and supporting sustainable and innovative urban distribution services.
  - Fostering the delivery of innovative and state of art T&L services through the promotion and facilitation of specialist training and the use of new technologies.

Or in one sentence:

> *"TLCs are key in supporting the development and operation of a* ***modern, more efficient and sustainable transport & logistics system****"*

TLCs AS KEY TRANSPORT INFRASTRUCTURES

- TLCs usually provide **intermodality** between two or more transport modes, being key in facilitating an efficient operation of the transport system and the associated supply chains.

- In this sense, TLCs' **aim** is to facilitate both an efficient modal shift between transport modes and an efficient flow of goods between both the transport infrastructures and the specific logistics facilities (warehouses, etc.).

- The existing **similarities between TLCs and Ports evolution** could help to better understand TLCs' role as key transport infrastructures.
  - TLCs are much more than single and isolated logistics and/or transport facilities, equally that Ports are much more than just individual Port Terminals. In both cases there is a need to develop and efficiently interconnect related economic activities both within the site and in the Hiterland/Foreland.
  - Over the last decades TLCs across EU have rapidly increased their cargo annual throughput getting very close to Ports' level.

*"Europlatforms widely claims a **growing role of TLCs within the TEN-T**"*

TLCs' ROLE WITHIN THE URBAN ENVIRONMENT

- TLCs promote **concentration** within the territory of both land use for related T&L facilities and traffic flows for related transport activities.

- As a consequence, those TLCs closer to urban built environments are in an unbeatable position to promote and facilitate sustainable strategies for **urban freight distribution**.

TLCs' ROLE WITHIN THE T&L SECTOR

- TLCs support **efficiency** in the use of T&L resources by better connecting long-haul transport with local distribution, promoting sustainable an efficient modal shift options suitable the specific needs, facilitating higher occupancy levels of rolling stock as well as shorter travel distances due to its optimum position in relation to both main transport networks and relevant urban and economic areas, etc.

- TLCs are in an unbeatable position to promote training and use of ITS as a mean to support T&L Sector **competitiveness** through quality, added value and efficiency improvement.

TLCs' IMPACT

- As direct consequence of the very particular conceptualization and key characteristics already described, TLCs generate four types of **positive impacts**:

  - On the ***Economic*** environment, TLCs support efficiency and cost reduction as well as the creation of added value along the supply chain inherent to any economic activity, and are also able to generate direct and indirect employment with lower investment rates than other industrial and service activities.

  - On the ***Social*** environment, the management board of TLCs provides the necessary critic mass and recognition within the local, regional and national scale, to facilitate the necessary stakeholders management, promoting a more active cooperation with them and a more ambitious corporate social responsibility.

  - On the ***Sectorial*** environment, TLCs facilitate a broad modernization and sophistication of the T&L services provision, fostering quality and innovation, and generating synergies and critic mass when required in the delivery of a particular T&L specialist services.

  - On the ***Natural*** environment, the widely accepted standards in the design, build and operation of TLCs imply a more careful and responsible approach to visual and acoustic impacts, waste management, usage of renewable energy and materials, etc. as well as a more strict design and implementation of compensation measures.

Impact (Cont.)

- In 2010 **ACTE**, Spanish Association of TLCs, carried out an <u>"Economical, Social, Sectorial and Environmental Impact Study"</u> for this particular sector in Spain, collecting and analysing real information provided by most of the TLCs in Spain. Based on that information, the study was able to identify and quantify a number of concrete <u>unit impact ratios</u> for the economical, social and sectorial dimensions. Should these unit impact ratios be applied to the case of **TLCs in Europe**, the result on the <u>impact generated</u> would be as follows:

"IMPACT" GENERATED BY TLCs

For an average TLC of 100 Ha

Construction

180,3 *million €* *Urbanization and Licenses*

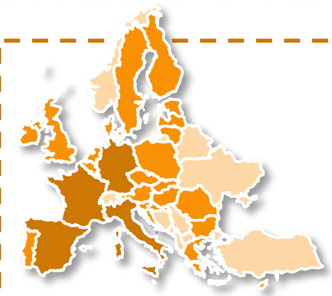
Operation

1,5 *million €/year* *Taxes and Maintenance Expend.*

3,0 *million ton/year*

3.100 *Empl. /year* *Direct and Indirect*

1,0 *million veh/year*



For all the TLCs identified in EU28

Construction

46.680 *million €* *Urbanization and Licenses*

Operation

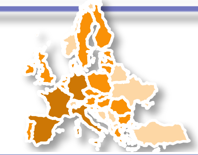
383 *million €/year* *Taxes and Maint. Expend.*

777 *million ton/year*

802.600 *Empl. /year* *Direct and Indirect*

259 *million veh/year*

Impact (Cont.)

Impact Ratio		Average TLC *100 Ha*	Total EU25 TLCs *25.891 Ha*
Concept	**Unitarian value**	**Impact**	**Impact**
Economic Impact - Construction (urbanization)		**180.300.000 €**	**46.681.473.000 €**
 - Investment in general urbanization and buildings	155 €/m^2_{gross}	155.000.000 "	40.131.050.000 "
- Investment in inner urbanization	20 €/m^2_{gross}	20.000.000 "	5.178.200.000 "
- Local revenues from construction licenses	5,3 €/m^2_{gross}	5.300.000 "	1.372.223.000 "
Economic Impact - Operation (local revenues)		**1.480.000 €/year**	**383.186.800 €/year**
 - Local revenues from land & buildings taxes	2,2 €/year/$m^2_{built\ roof}$*	880.000 "	227.840.800 "
- Local revenues from maintenance expenditure	0,6 €/year/m^2_{gross}	600.000 "	155.346.000 "
** Buildability:*	*0,4 $m^2_{built\ roof}/m^2_{gross}$*		
Social Impact - Employment under operation	**31 empl/year/Ha_{gross}**	**3.100 empl/year**	**802.621 empl/year**
 - Direct	25 empl./Ha_{gross}	2.500 "	647.275 "
Logistics	*14 empl./Ha_{gross}*	*1.400* "	*362.474* "
Not logistics	*11 empl./Ha_{gross}*	*1.100* "	*284.801* "
- Indirect	6 empl./Ha_{gross}	600 "	155.346 "
Sectorial impact - Activity			
 - Cargo tones	3 ton/year/m^2_{gross}	3.000.000 ton/year	776.730.000 ton/year
- Industrial vehicles	1 veh/year/m^2_{gross}	1.000.000 vehs/year	258.910.000 vehs/year

Source: ACTE Spain (www.acte.es)

SAVINGS

- Based on *Eurostats'* and other sources' statistics, it is also possible to identify and quantify several unit impact savings ratios for the economical and environmental dimensions.
- Should we apply these unit impact saving ratios to the case of an average **TLC of 100 Ha with a two tracks rail terminal**, the savings on the impact generated would be as follows:
- By considering vehicles characteristics, **emissions by truck** for a define distance can be calculated, and unit savings on CO2, NOx, HC and PM provided.

"SAVINGS" FACILITATED BY TLCs

Average TLC 100 Ha – 2 rail tracks

Operation

3,0 *million €/year* — *Specialized facilities in goods handling*

Transport

4,8 *million €/year* — *Transfer Road – Rail 300 Km track railway*

Environment

16,0 *million €/year* — *Transfer Road – Rail Gas emissions*

Average emissions/Km for a truck

CO2	NOx	HC	Particulate matter
750 gCO2/Km	2,5 gNOx/Km	0,5 gHC/Km	0,04 gPM/Km

Source: IDAE

Savings for 300 Km (tranfer Road – Rail)

225 *Kg CO2*

0,15 *Kg HC*

0,75 *Kg NOx*

0,012 *Kg PM*

Savings (Cont.)

- **Energy** represents up to <u>10% of total warehouse costs</u>. Savings in this field would reduce the costs significantly.

- A sustainable warehouse may reduce the required energy, warmth, water and light and will minimize waste production. Sustainable options should be found to ensure a warehouse where **sustainability** meets performance. In this sense, less energy costs and a better employee satisfaction would be achieved if it is built in a sustainable way (actions implemented during the construction phase).

- For example, dynamic **lighting** with motion sensors will <u>reduce energy demand</u> by almost 50%. Besides, some sustainable options represent high initial costs, being the payback period very long

- **Other** sustainable options with no large investments and a great performance:
  - Green <u>façade</u> (Heating)
  - Motion sensors for <u>taps and showers</u> (Water)
  - <u>Power</u> consumption (sub)meters (Energy).

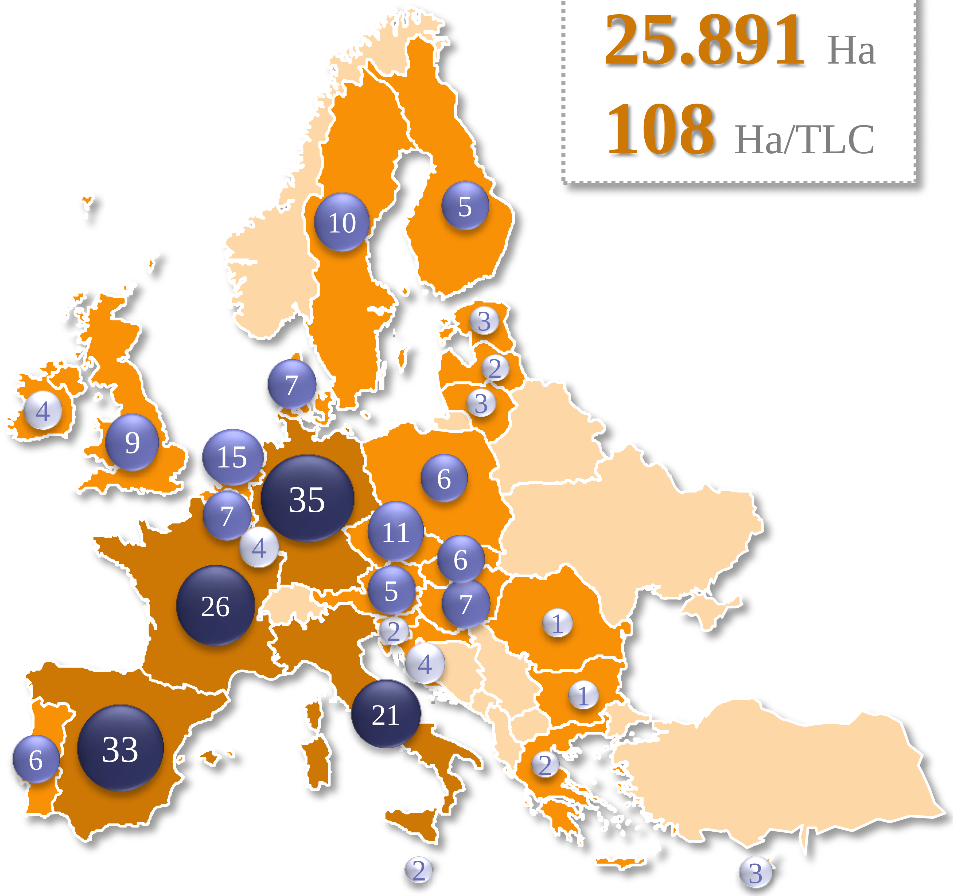
WHAT IS A TRANSPORT & LOGISTICS CENTRE?

Where are they across the EU-28?

GENERAL OVERVIEW

- Across the EU–28 a **number** of <u>240 TLCs</u> belonging to the most representative national associations have been identified.
- These 240 TLCs provide approximately <u>25.891 Ha</u> of gross **surface** specifically designed, built and equipped for the development of T&L activities. This implies an average size of <u>108 Ha/TLC</u>.
- Four countries, namely **Germany, Spain, France and Italy**, represent <u>47,9%</u> of the total <u>number</u> of TLCs identified and <u>62,1%</u> of their gross <u>surface</u>.
- **Maturity** in the development of TLCs varies on a <u>country by country</u> basis, and depends on the ratio used for comparison.

240 TLCs
25.891 Ha
108 Ha/TLC



COUNTRY		TLCs				NATIONAL RATIOS					
#	Name	Number (#)	%	Surface (Ha_{TLC})	%	Population (10^6 hab)	10^6 hab / # TLC	Surface (10^3 Ha)	10^3 Ha / # TLC	Cargo (10^6 Ton)	10^6 Ton / # TLC
1	Germany	35	14,6%	6.132	23,7%	80,78	2,31	35.720	1.021	3.833	110
2	Spain	33	13,8%	3.726	14,4%	46,51	1,41	50.600	1.533	1.554	47
3	France	26	10,8%	2.756	10,6%	65,86	2,53	63.280	2.434	2.464	95
4	Italy	21	8,8%	3.460	13,4%	60,78	2,89	30.210	1.439	1.570	75
5	The Netherlands	15	6,3%	999	3,9%	16,83	1,12	4.150	277	1.550	103
6	Czech Republic	11	4,6%	496	1,9%	10,51	0,96	7.890	717	436	40
7	Sweden	10	4,2%	445	1,7%	9,64	0,96	43.860	4.386	510	51
8	United Kingdom	9	3,8%	858	3,3%	64,31	7,15	24.850	2.761	2.134	237
9	Denmark	7	2,9%	1.195	4,6%	5,63	0,80	4.290	613	270	39
10	Belgium	7	2,9%	977	3,8%	11,20	1,60	3.050	436	773	110
11	Hungary	7	2,9%	216	0,8%	9,88	1,41	9.300	1.329	224	32
12	Portugal	6	2,5%	393	1,5%	10,43	1,74	9.220	1.537	236	39
13	Poland	6	2,5%	346	1,3%	38,50	6,42	31.270	5.212	1.601	267
14	Slovakia	6	2,5%	89	0,3%	5,42	0,90	4.900	817	57	9
15	Austria	5	2,1%	867	3,3%	8,51	1,70	8.390	1.678	432	86
16	Finland	5	2,1%	330	1,3%	5,45	1,09	33.840	6.768	416	83
17	Croatia	4	1,7%	465	1,8%	4,28	1,07	5.659	1.415	103	26
18	Luxembourg	4	1,7%	124	0,5%	0,55	0,14	260	65	68	17
19	Ireland	4	1,7%	55	0,2%	4,60	1,15	6.980	1.745	155	39
20	Lithuania	3	1,3%	592	2,3%	2,94	0,98	6.530	2.177	140	47
21	Estonia	3	1,3%	340	1,3%	1,32	0,44	4.520	1.507	118	39
22	Cyprus	3	1,3%	95	0,4%	0,86	0,29	930	310	23	8
23	Greece	2	0,8%	263	1,0%	10,99	5,50	13.200	6.600	644	322
24	Slovenia	2	0,8%	158	0,6%	2,06	1,03	2.030	1.015	100	50
25	Latvia	2	0,8%	105	0,4%	2,00	1,00	6.460	3.230	184	92
26	Malta	2	0,8%	89	0,3%	0,43	0,21	30	15	5	3
27	Romania	1	0,4%	250	1,0%	1,23	1,23	23.839	23.839	312	312
28	Bulgaria	1	0,4%	70	0,3%	7,36	7,36	11.099	11.099	219	219
		240	***Total***	**25.891**	100,0%	***Average***	**1,98**	***Average***	**3.070**	***Average***	**93**
			Average	**108**							

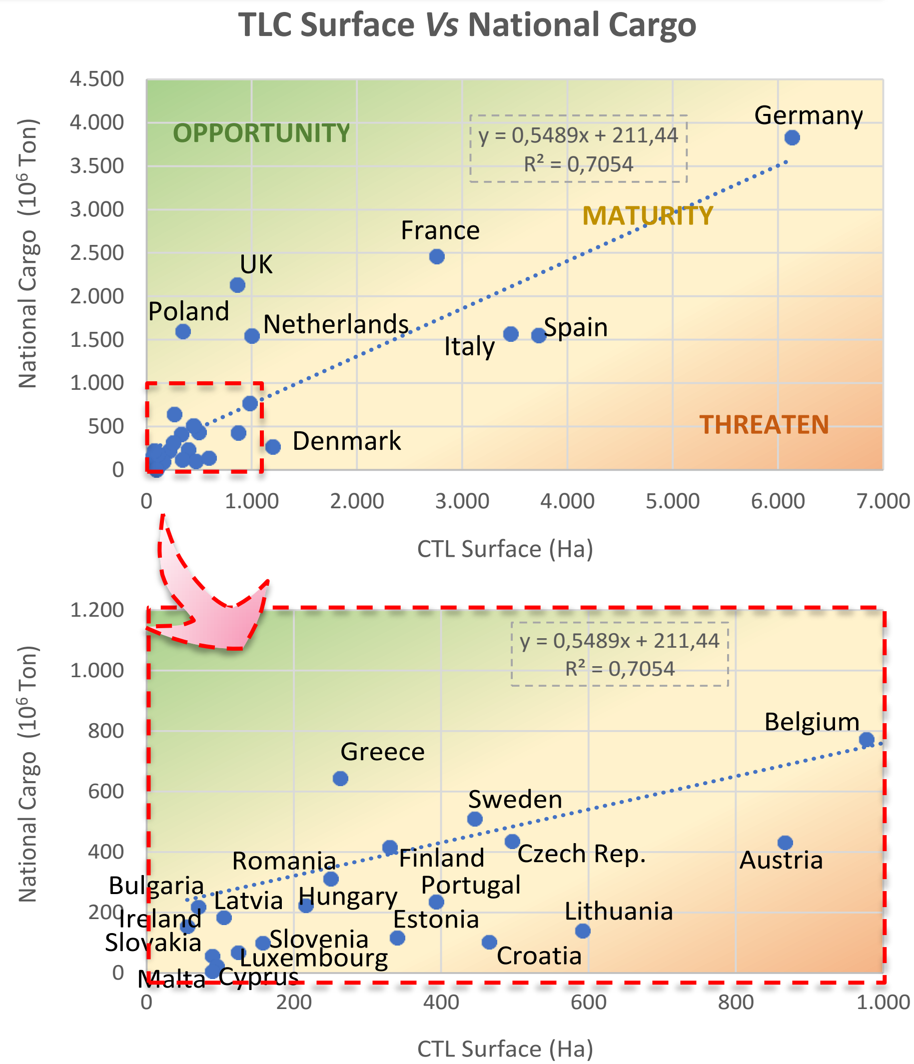
Four countries represent 47,9% of TLCs and 62,1% of their gross Surface.

Opportunity for further development in relation to the specific ratio.

Threaten of excessive development in relation to the specific ratio.

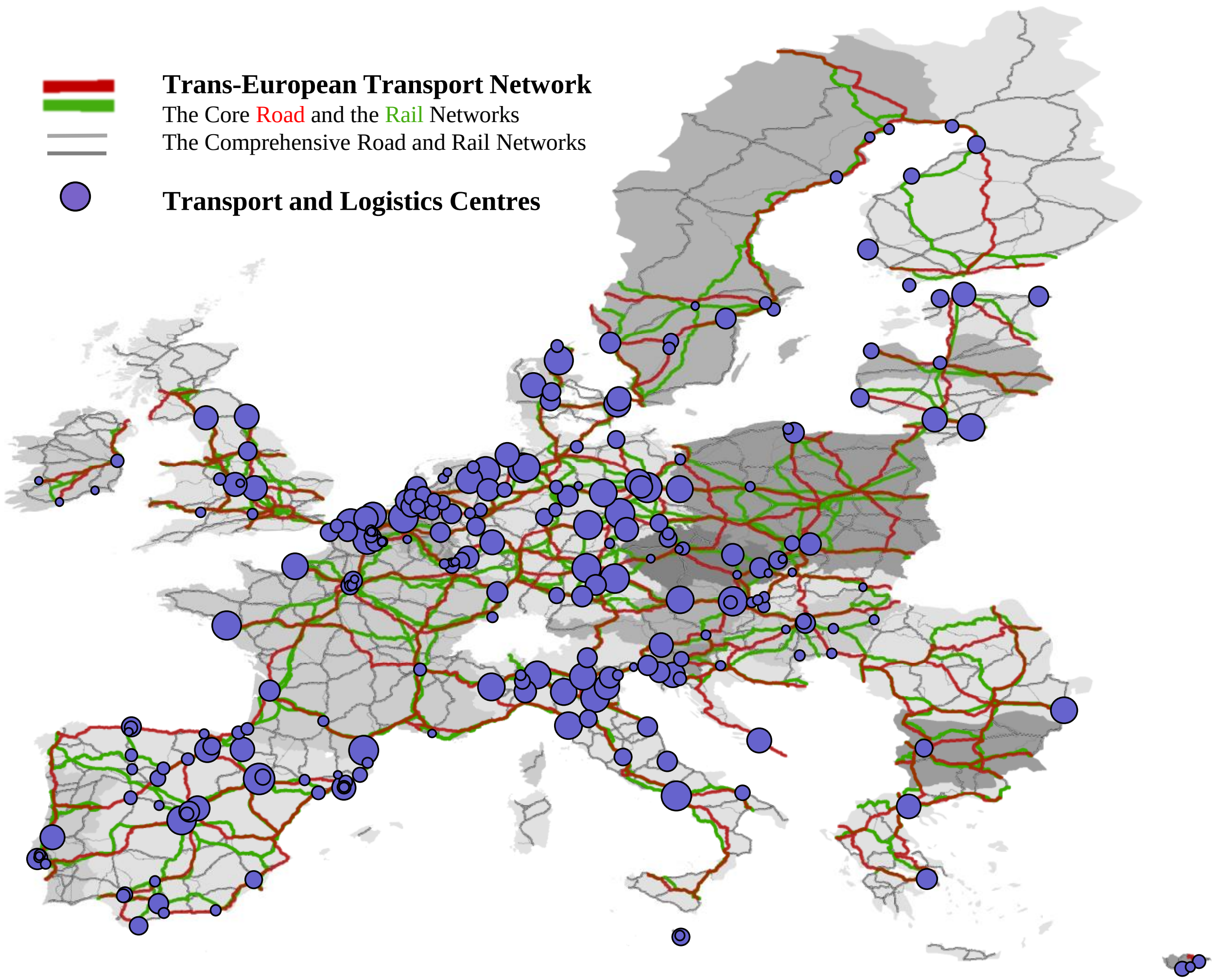
- As it can be observed in the graphics to the right, there is a **linear** relationship between TLCs' gross surface and the total annual cargo volume across the EU-28, with moderate dispersion for most of the countries with respect to the "trend".
- Those countries closer to the green band, like Poland, UK or Greece, could present an opportunity for further development of surface and/or number of TLCs in light of the proportionally higher national cargo flows, whilst those countries closer to the red band, like Malta, Luxemburg or Cyprus, could present a risk associated to a too high development of total TLCs' surface.

*"All the countries within the **EU-28** did realize about the need and opportunity of developing sound TLCs network."*



TLCs AND TEN-T

- TLCs constitute key transport infrastructures and, in many cases, provide **intermodality** between two or more transport modes.
- Therefore, their location is in most of the cases coincident with **key nodes of the TEN-T** (Trans European Transport Network), particularly for both road and rail.



1. GERMANY

- **D.G.G.** (Deutsche GVZ-Gesellschaft mbH) is the most relevant organization in Germany representing and coordinating the developers of <u>GVZ</u> (Güterverkehrszentrum).
- There are **35 TLCs** in Germany **(**21 of them represented by DGG) accounting a total surface of <u>6.132 Ha</u> and facilitating intermodality with <u>all the transport modes</u>.
- All TLCs provide <u>rail</u> connectivity, being connectivity with <u>inland waterways</u> remarkable in comparison with other European TLCs and countries.
- Most of TLCs in Germany are developed by <u>Public-Private Partnerships</u>.

#	Name	Ha_{TLC}	Modes				
			Road	Rail	Sea	River	Air
35	GVZ ………	6.132	✓	✓	✓	✓	✓

Where are they across the EU-28?

#	Name	Ha_{TLC}	Modes				
			Road	Rail	Sea	River	Air
1	GVZ Leipzig	600	✓	✓			✓
2	GVZ Bremen	475	✓	✓			
3	GVZ Berlin Süd	440	✓	✓			
4	GVZ Emsland	400	✓	✓	✓		
5	GVZ Regensburg	360	✓	✓		✓	
6	GVZ Erfurt	350	✓	✓			✓
7	GVZ Nürnberg	337	✓	✓		✓	
8	GVZ Magdeburg	307	✓	✓		✓	
9	GVZ Kiel	270	✓	✓	✓		
10	GVZ Europark	240	✓	✓			
11	GVZ Frankfurt/Oder	237	✓	✓			
12	GVZ Berlin West	226	✓	✓		✓	
13	GVZ Koblenz	210	✓	✓		✓	
14	GVZ Südwestsachsen	172	✓	✓			
15	GVZ JadeWeserPort	160	✓	✓	✓		
16	GVZ Rheine	140	✓	✓		✓	
17	GVZ Berlin Ost	130	✓	✓			
18	GVZ Trier	130	✓	✓		✓	

#	Name	Ha_{TLC}	Modes				
			Road	Rail	Sea	River	Air
19	GVZ Ingolstadt	118	✓	✓			
20	GVZ Augsburg	112	✓	✓			✓
21	GVZ Salzgitter	110	✓	✓			
22	GVZ Köln	87	✓	✓			✓
23	GVZ Kassel	75	✓	✓			
24	GVZ Dresden	73	✓	✓		✓	
25	GVZ Rostock	68	✓	✓	✓		
26	GVZ Ulm	60	✓	✓			
27	GVZ Osnabrück	46	✓	✓		✓	
28	City GVZ Westhafen	40	✓	✓		✓	
29	GVZ Göttingen	35	✓	✓			
30	GVZ Hannover-Lehrte	35	✓	✓			
31	GVZ Lübeck	32	✓	✓	✓		
32	GVZ Herne-Emscher	23	✓	✓		✓	
33	GVZ Weil am Rhein	20	✓	✓		✓	
34	GVZ Hof	10	✓	✓			
35	GVZ Wolfsburg	4	✓	✓			
	Total	**6.132**					

2. SPAIN

- **A.C.T.E.** (Asociación de Centros de Transporte en España) is the most relevant organization in Spain representing and coordinating the developers of CT (Centros de Transporte), ZAL (Zona de Actividades Logísticas), and some others.

- **33 TLCs** have been identified in Spain, most of them (but not all) represented by ACTE, accounting a total surface of 3.726 Ha and facilitating intermodality with most of the transport modes, except for inland waterways, which are not a real alternative in Spain except for Seville.

- Most of TLCs provide rail connectivity, being air and maritime connectivity remarkable in comparison with other European TLCs and countries.

#	Name	Ha_{TLC}	Modes				
			Road	Rail	Sea	River	Air
33	C.T., ZAL, ...	3.726	✓	✓	✓	✓	✓

Where are they across the EU-28?

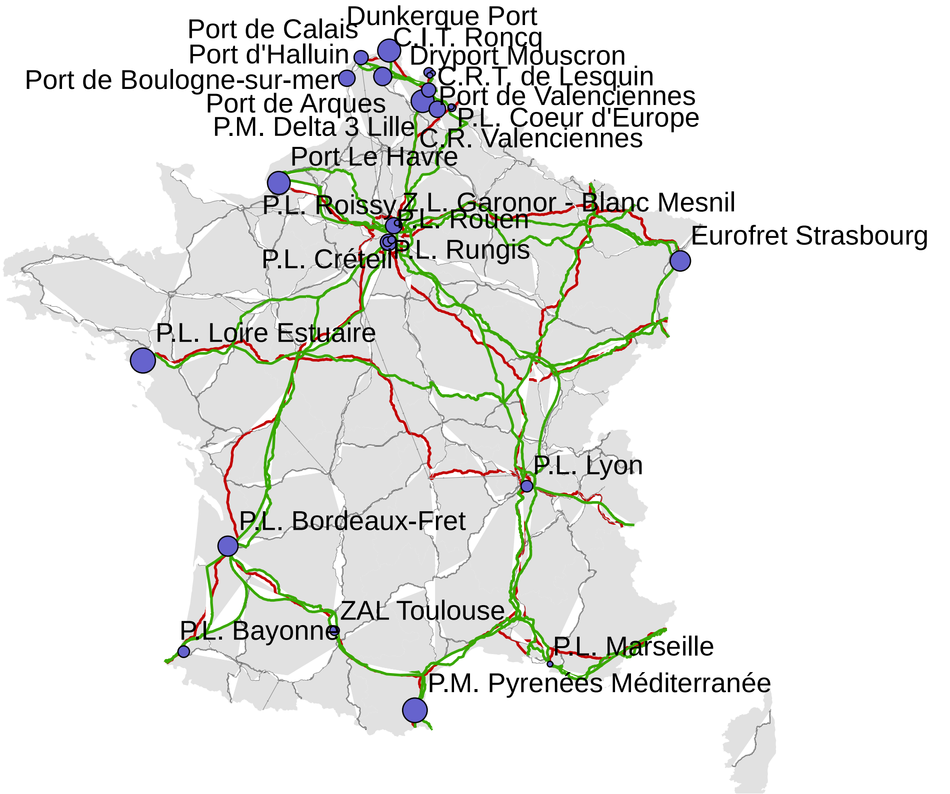
#	Name	Ha_{TLC}	Modes				
			Road	Rail	Sea	River	Air
1	Pla-za	1.285	✓	✓			✓
2	Central Iberum	350	✓				
3	Cimalsa - BCN(5 C.I.M)	248	✓	✓			✓
4	Arasur	200	✓	✓			
5	ZAL Gran Europa	182	✓	✓			✓
6	C.T. Pamplona	160	✓	✓			
7	ZAL Cilsa BCN	150	✓	✓	✓		✓
8	C.T. Coslada	108	✓	✓			✓
9	Zalia	100	✓		✓		
10	A.L. Antequera	100	✓	✓			
11	A.L. Algeciras	85	✓	✓			
12	Citmusa	75	✓				
13	C.T. Vitoria-Gasteiz	72	✓	✓			✓
14	C.T. Zaragoza	61	✓	✓			
15	C.I.M. Valladolid	60	✓				
16	C.T.M. Sevilla	52	✓	✓			
17	Parc Logistic Z.Franca	41	✓		✓		

#	Name	Ha_{TLC}	Modes				
			Road	Rail	Sea	River	Air
18	C.T. Gijón	40	✓				
19	Zaisa Irún	40	✓	✓	✓		
20	ZAL Sevilla	35	✓	✓		✓	
21	P.L. Salamanca	35	✓	✓			
22	C.T. Madrid	34	✓				
23	C.T. León Cetile	27	✓	✓			
24	Cetrapal	27	✓				
25	C.T. Aduana de Burgos	25	✓	✓			✓
26	C.T.M. Málaga	23	✓				
27	A.L. Córdoba	23	✓	✓			
28	C.T. Benavente	22	✓				
29	C.T. Almería	19	✓				
30	Consorci Z.Franca BCN	16	✓	✓	✓		✓
31	C.L. Ávila	13	✓	✓			
32	Bikakabo Aparcabisa	11	✓		✓		
33	C.T. Oviedo	7	✓				
	Total	**3.726**					

3. FRANCE

- Most relevant organizations in France are:
  - **Euralogistic**: regional T&L Association in the north of France (Region of Nord-Pas de Calais).
  - **Sogaris**: important national organization representing a large number of TLCs.
- There are **26 TLCs** represented by this organizations, accounting a total surface of 2.756 Ha and facilitating intermodality with all the transport modes.
- Most of TLCs provide rail connectivity, being air and maritime connectivity remarkable in comparison with other European TLCs and countries. Inland waterways are also an alternative but only in 3 out of 26 TLCs.

#	Name	Ha_{TLC}	Modes				
			Road	Rail	Sea	River	Air
26	P.L., Port, ……..	2.756	✓	✓	✓	✓	✓



Where are they across the EU-28?

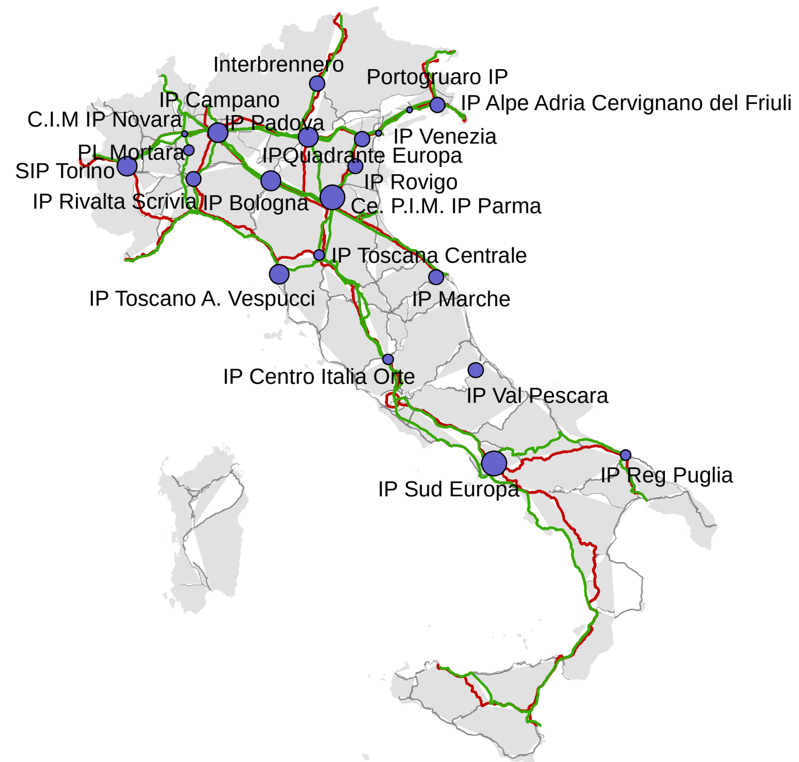
#	Name	Ha_{TLC}	Modes				
			Road	*Rail*	*Sea*	*River*	*Air*
1	P.M. Pyrenées Méditerranée	500	✓	✓	✓		✓
2	P.L. Loire Estuaire	400	✓	✓	✓		✓
3	Dunkerque Port	360	✓	✓	✓		
4	P.M. Delta 3 Lille	333	✓	✓	✓		
5	Port Le Havre	250	✓	✓	✓		
6	Eurofret Strasbourg	110	✓	✓		✓	
7	P.L. Bordeaux-Fret	108	✓	✓	✓		
8	Port de Arques	100	✓		✓		
9	P.L. Coeur d'Europe	90	✓	✓			
10	P.L. Rouen	85	✓			✓	
11	Z.L. Garonor - Blanc Mesnil	85	✓				✓
12	Port de Boulogne-sur-mer	80	✓		✓		
13	Port de Calais	40	✓		✓		

#	Name	Ha_{TLC}	Modes				
			Road	*Rail*	*Sea*	*River*	*Air*
14	C.R.T. de Lesquin	36	✓	✓			✓
15	P.L. Lyon	32	✓	✓			
16	P.L. Bayonne	30	✓	✓	✓		
17	P.L. Rungis	20	✓	✓			✓
18	ZAL Toulouse	20	✓	✓		✓	✓
19	Port d'Halluin	18	✓		✓		
20	Port de Valenciennes	12	✓	✓	✓		✓
21	P.L. Créteil	12	✓	✓			
22	P.L. Marseille	9	✓	✓	✓		
23	C.R. Valenciennes	7	✓	✓	✓		✓
24	Dryport Mouscron	7	✓	✓			
25	P.L. Roissy	7	✓				✓
26	C.I.T. Roncq	5	✓	✓			
	Total	**2.756**					

4. ITALY

- **U.I.R.** (L'Unione Interporti Riuniti) is the most relevant organization in Italy, representing and coordinating all the existing Interporti.
- There are **21 TLCs** represented by UIR, accounting a total surface of 3.460 Ha and facilitating road-rail intermodality in all the cases.
- Maritime and particularly air connectivity is very weak in Italian TLCs, whilst there is not connectivity with inland waterways.

#	Name	Ha_{TLC}	Modes				
			Road	Rail	Sea	River	Air
21	Interporto ……...	3.460	✓	✓	✓		✓



Where are they across the EU-28?

#	Name	Ha_{TLC}	Modes: Road	Rail	Sea	River	Air
1	Interporto Sud Europa	520	✓	✓			
2	Interporto di Bologna	420	✓	✓			
3	Società Interporto di Torino	300	✓	✓			
4	Interporto Campano	300	✓	✓			
5	Interporto Toscano A. Vespucci	280	✓	✓	✓		
6	Ce. P.I.M. Interporto di Parma	254	✓	✓			
7	Interporto Quadrante Europa	250	✓	✓			✓
8	Interporto di Rovigo	190	✓	✓	✓		
9	Interporto Rivalta Scrivia	125	✓	✓			
10	Interporto di Padova	110	✓	✓			
11	Interporto Marche	104	✓	✓	✓		✓

#	Name	Ha_{TLC}	Modes: Road	Rail	Sea	River	Air
12	Interbrennero	100	✓	✓			
13	Interporto Alpe Adria	100	✓	✓			
14	Interporto Val Pescara	96	✓	✓			
15	Interporto Centro Italia Orte	78	✓	✓			
16	Interporto Toscana C.	75	✓	✓			
17	P L Internato Mortara	60	✓	✓			
18	Interpoto Regionale Puglia	50	✓	✓			
19	Interporto di Venezia	21	✓	✓	✓		
20	C.I.M Interporto di Novara	18	✓	✓			
21	Portogruaro Interporto	9	✓	✓			
	Total	**3.460**					

5. THE NETHERLANDS

- In The Netherlands most relevant organizations are **Association of the Dutch T&L Companies** and **Association of Dutch Goods Transportation Companies**.

- A number of **15 TLCs** have been identified, accounting a total surface of <u>999 Ha</u> and facilitating intermodality with <u>all the transport modes</u>, but separately and not individually, being road-rail intermodality the most representative.

#	Name	Ha_{TLC}	Modes: Road	Rail	Sea	River	Air
1	L.C. Rotterdam	140	✓	✓	✓		
2	Shiphol Airport	120	✓				✓
3	Moerdijk-Tradepark	110	✓	✓	✓		
4	Port of Amsterdam	100	✓	✓	✓		
5	Venlo Trade Port	100	✓	✓		✓	
6	Tilburg-Vossenberg	80	✓	✓	✓		
7	Distripark Doelwijk	60	✓				
8	Utrecht-Lage Weide	55	✓	✓		✓	
9	Nijmegen-Wijchen	50	✓			✓	
10	Eindhoven-Flight Forum	50	✓				✓
11	Oosterhout-Weststad	45	✓		✓		
12	Tiel-Medel	38	✓				
13	Groningen Railport	30	✓	✓		✓	
14	Koopman (Emmeloord)	13	✓				
15	Heerenveen	8	✓				
	Total	**999**					

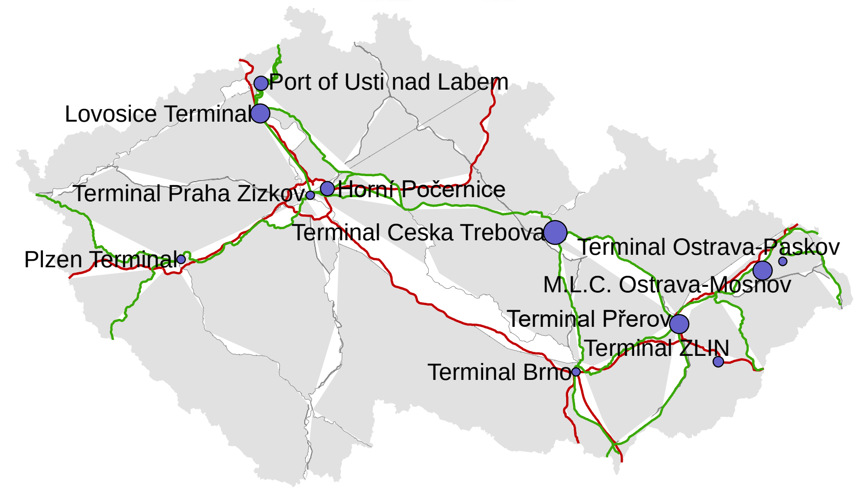
6. CZECH REPUBLIC

- The **Czech Logistics Association** collaborate with its associated TLCs supporting training and exchange of information among logisticians at all executive and managerial levels.

- There are **11 TLCs** represented by this organization, accounting a total surface of 496 Ha and facilitating full road-rail intermodality, whilst connectivity with inland waterways and air mode is more limited.

- TLCs in the Czech Republic are financed by Public-Private Partnerships.

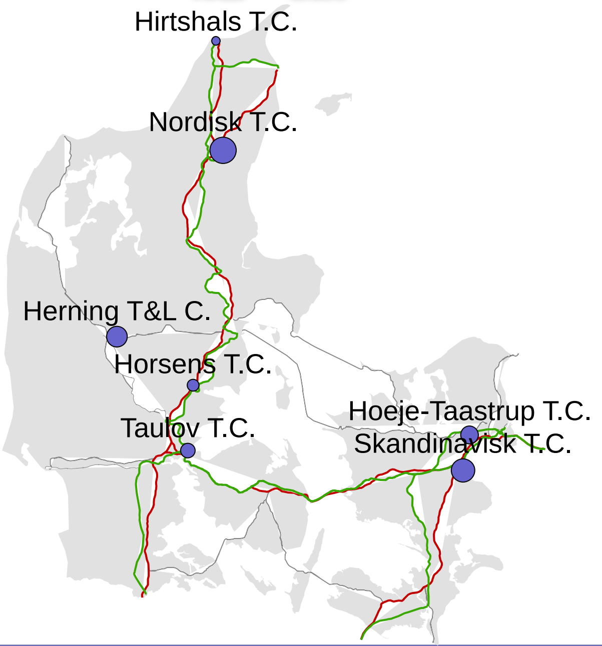
#	Name	Ha_{TLC}	Modes: Road	Rail	Sea	River	Air
1	Terminal Ceska Trebova	138	✓	✓			
2	Terminal Přerov	100	✓	✓			
3	M.L.C. Ostrava-Mosnov	90	✓	✓			✓
4	Lovosice Terminal	70	✓	✓		✓	
5	Horní Počernice	40	✓				
6	Port of Usti nad Labem	32	✓	✓		✓	
7	Terminal ZLIN	7	✓	✓			
8	Plzen Terminal	5	✓	✓			
9	Terminal Praha Zizkov	5	✓	✓			
10	Terminal Brno	5	✓	✓			
11	Terminal Ostrava-Paskov	4	✓	✓			
	Total	496					



7. DENMARK

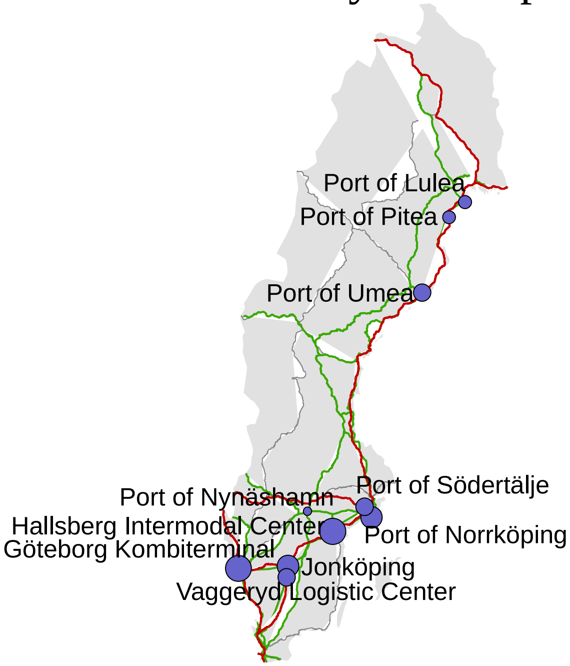
- **F.D.T.** (Association of Danish Transport and Logistics Centres) is the trade organisations for transport centres in Denmark.
- **7 TLCs** have been identified in Denmark, all of them represented by FDT, accounting a total surface of 1.195 Ha and mainly facilitating road-rail intermodality. Connectivity with maritime is more limited.
- Most of the **TLCs** in Denmark are financed by Public-Private Partnerships, being the Nordic Transport Centre the most remarkable example in this sense.

#	Name	Ha_{TLC}	Modes				
			Road	Rail	Sea	River	Air
1	Nordisk T.C.	365	✓	✓	✓		
2	Skandinavisk T.C.	240	✓	✓	✓		
3	Herning T&L C.	205	✓				
4	Hoeje-Taastrup T.C.	170	✓	✓			
5	Taulov T.C.	105	✓	✓			
6	Horsens T.C.	85	✓				
7	Hirtshals T.C.	25	✓	✓	✓		
	Total	1.195					



8. SWEDEN

- **S.I.F.A.** (Swedish International Freight Association) and the **S.I.L.F.** (Swedish National Association of Purchasing & Logistics) are the most relevant organizations in Sweden.
- There are **10 TLCs** represented by these organizations, accounting a total surface of <u>445 Ha</u> and facilitating mainly <u>road-rail-maritime intermodality</u>, whilst connectivity with air and inland waterways is not provided.

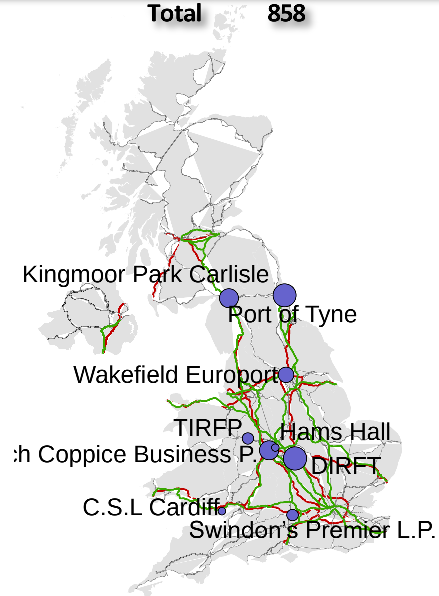


#	Name	Ha_{TLC}	Modes				
			Road	Rail	Sea	River	Air
1	Göteborg Kombiterminal	120	✓	✓	✓		
2	Port of Norrköping	110	✓	✓	✓		
3	Jonköping	50	✓	✓			
4	Port of Nynäshamn	40	✓	✓	✓		
5	Port of Södertälje	30	✓	✓	✓		
6	Vaggeryd Logistic Center	30	✓	✓	✓		
7	Port of Umea	25	✓	✓	✓		
8	Port of Lulea	20	✓	✓	✓		
9	Port of Pitea	15	✓	✓	✓		
10	Hallsberg Intermodal Center	5	✓	✓			
	Total	**445**					

9. UNITED KINGDOM

- **F.T.A.** (Freight Transport Association), **U.K.W.A.** (United Kingdom Warehousing Association) and **C.I.L.T.** (Chartered Institute of Logistics and Transport in the UK) are the most relevant organizations in the United Kingdom.
- There are **9 TLCs** represented by these organizations, accounting a total surface of <u>858 Ha</u> and facilitating <u>road-rail intermodality</u>, whilst connectivity with maritime and air is very poor and inland waterways is not provided.
- An important part of TLCs in the United Kingdom are <u>private</u>.

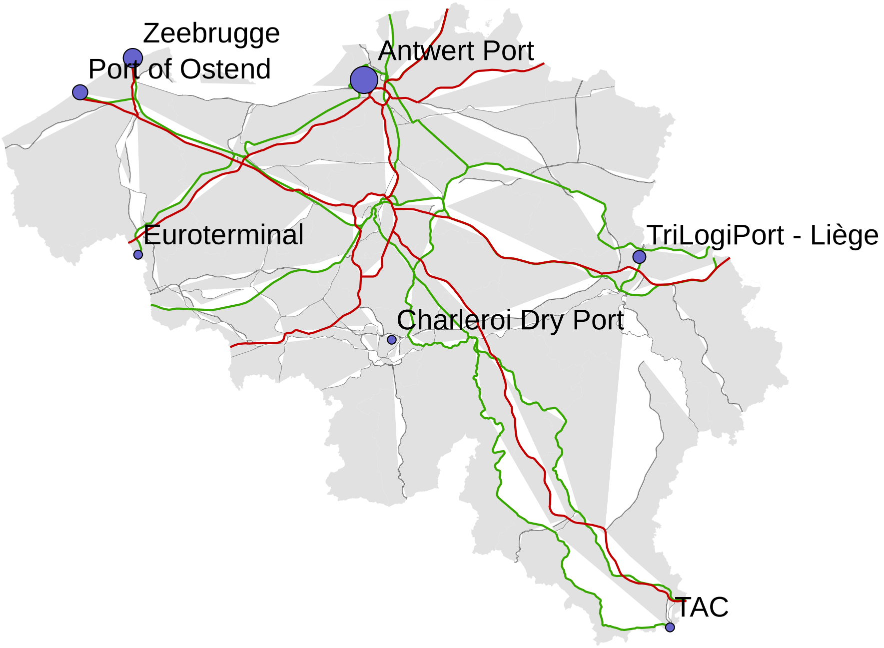
#	Name	Ha_{TLC}	Modes				
			Road	*Rail*	*Sea*	*River*	*Air*
1	Port of Tyne	200	✓	✓	✓		
2	DIRFT	190	✓	✓			
3	Birch Coppice Business P.	160	✓	✓			
4	Kingmoor Park Carlisle	160	✓	✓			
5	Wakefield Europort	85	✓	✓			
6	TIRFP	28	✓	✓			
7	Swindon's Premier L.P.	20	✓	✓			
8	C.S.L Cardiff	10	✓	✓	✓		✓
9	Hams Hall	5	✓	✓			
	Total	**858**					



10. BELGIUM

- In Belgium there are **7 TLCs**, accounting a total surface of 977 Ha and facilitating intermodality with all modes, although connectivity with inland waterways and air mode is limited.

#	Name	Ha_{TLC}	Modes				
			Road	Rail	Sea	River	Air
1	Antwert Port	450	✓	✓	✓		
2	Zeebrugge	250	✓	✓	✓		
3	Port of Ostend	150	✓	✓	✓		✓
4	TriLogiPort - Liège	100	✓	✓		✓	
5	TAC	16	✓	✓	✓		
6	Euroterminal	6	✓	✓			
7	Charleroi Dry Port	5	✓	✓		✓	
	Total	977					



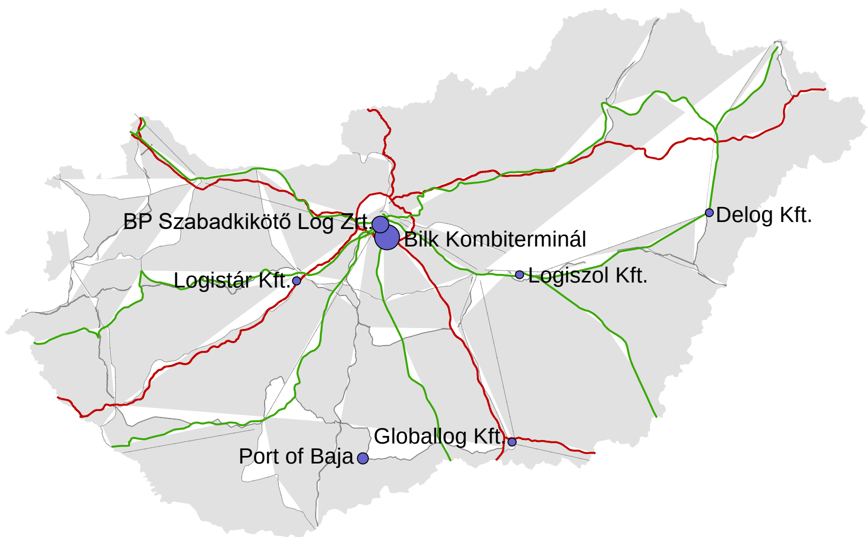
11. HUNGARY

- **MLSZKSZ,** Association of Hungarian Logistics Service Centres, is the most relevant organization in Hungary, representing almost 90% of the TLCs in the country.

- There are **7 TLCs** represented by this association, accounting a total surface of 216 Ha and facilitating full road-rail intermodality, whilst connectivity with inland waterways and air mode is more limited.

- A relevant number of TLCs in Hungary are financed by Public-Private Partnerships, being Bilk Kombiterminál the most relevant example.

#	Name	Ha_{TLC}	Modes				
			Road	Rail	Sea	River	Air
1	Bilk Kombiterminál	100	✓	✓			
2	BP Szabadkikötő Log Zrt.	50	✓	✓		✓	
3	Port of Baja	21	✓	✓		✓	
4	Delog Kft.	16	✓	✓			
5	Logiszol Kft.	15	✓	✓			
6	Globallog Kft.	10	✓	✓		✓	✓
7	Logistár Kft.	4	✓	✓			
	Total	**216**					



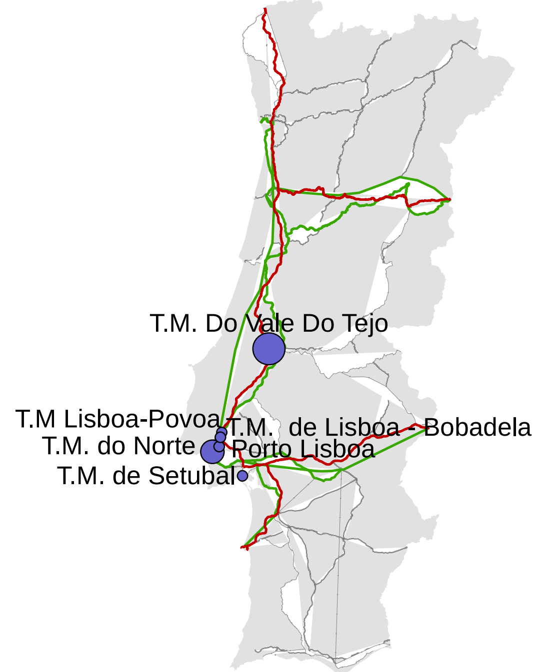
12. PORTUGAL

- **A.P.L.O.G** (Portuguese Logistics Association) and **A.P.O.L.** (Portuguese Association of Logistics Operators) are the most relevant organizations of Portuguese TLCs, being A.P.L.O.G the most important one.

- There are **6 TLCs** represented by this organization, accounting a total surface of 393 Ha and facilitating full road-rail intermodality and almost full with maritime, whilst connectivity with inland waterways and air mode is not provided.

- The majority of TLCs in Portugal are private.

#	Name	Ha_{TLC}	Modes				
			Road	*Rail*	*Sea*	*River*	*Air*
1	T.M. Do Vale Do Tejo	220	✓	✓			
2	Porto Lisboa	120	✓	✓	✓		
3	T.M Lisboa-Povoa	20	✓	✓	✓		
4	T.M. do Norte	16	✓	✓			
5	T.M. de Setubal	11	✓	✓	✓		
6	T.M. de Lisboa - Bobadela	6	✓	✓	✓		
	Total	**393**					

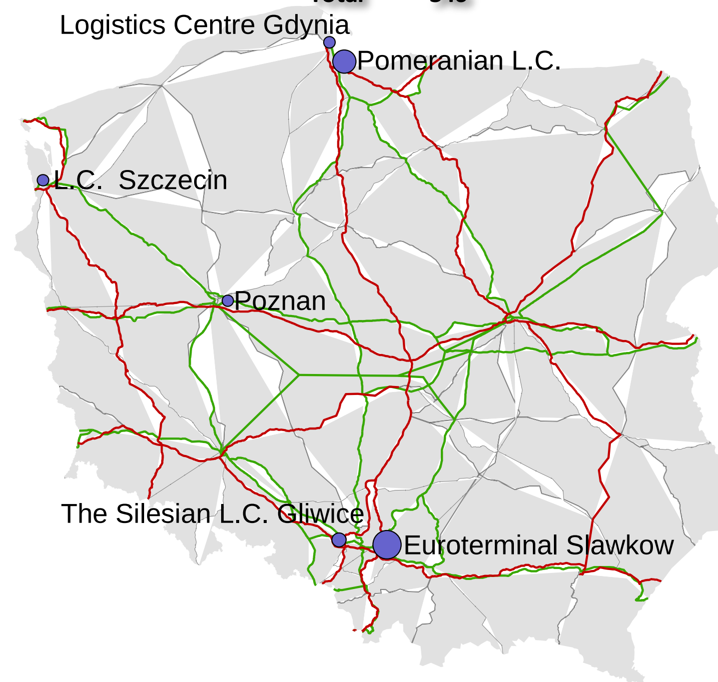


13. POLAND

- The **Polish International Freight Forwarders Association** is a voluntary self governing organization representing entrepreneurs based in TCLs in Poland

- There are **6 TLCs** in Poland represented by this association, accounting a total surface of <u>346 Ha</u> and facilitating full <u>road-rail intermodality</u>, whilst connectivity with inland waterways and maritime and air modes is more limited.

#	Name	Ha_{TLC}	Modes				
			Road	Rail	Sea	River	Air
1	Euroterminal Slawkow	140	✓	✓			
2	Pomeranian L.C.	110	✓	✓	✓		
3	The Silesian L.C. Gliwice	47	✓	✓		✓	
4	L.C. Szczecin	20	✓	✓		✓	
5	Logistics Centre Gdynia	19	✓	✓		✓	
6	Poznan	10	✓	✓			
	Total	**346**					



14. SLOVAKIA

- The **Association of Logistics and Freight Forwarding of the Slovak Republic** is an organization that favours freight transport and logistics service providers.
- There are **6 TLCs** with a gross surface of 89 Ha and partly facilitating road-rail intermodality, whilst connectivity with inland waterways and air modes is more limited.

#	Name	Ha_{TLC}	Modes				
			Road	Rail	Sea	River	Air
1	TerminalDunajska Streda	28	✓	✓			
2	Bratislava Palenisko	21	✓	✓		✓	
3	ProLogis Park Bratislava	20	✓				
4	Bratislava Logistics Park	12	✓				
5	Immopark Kosice	5	✓				
6	Immopark Zilina	3	✓				✓
	Total	89					

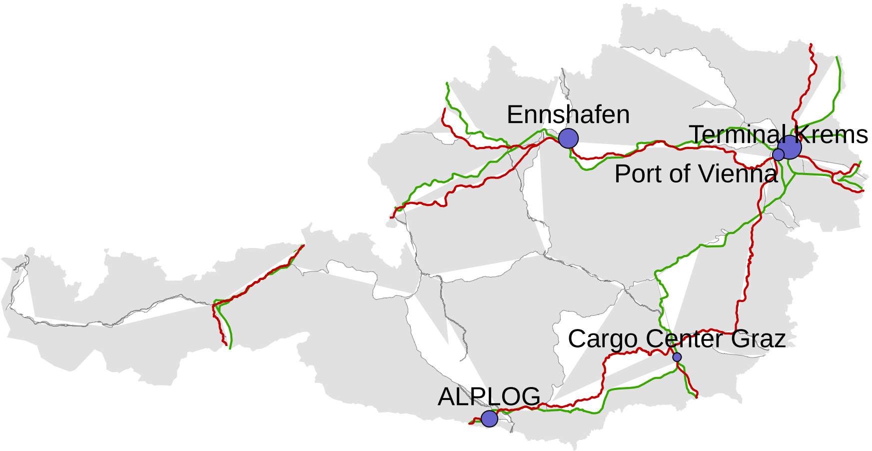
15. AUSTRIA

- **B.V.L.** (Austrian Federal Association of Logistics) is the largest Austrian logistics network, which serves as a platform for on-going knowledge, information, experience exchange and continuous education

- There are **5 TLCs** represented by this organization, accounting a total surface of 867 Ha and facilitating full road-rail intermodality, whilst connectivity with inland waterways is more limited and maritime and air connectivity is not provided.

- A relevant number of TLCs in Austria are financed by Public-Private Partnerships, being Cargo Centre Graz the most relevant example.

#	Name	Ha_{TLC}	Modes				
			Road	Rail	Sea	River	Air
1	Port of Vienna	350	✓	✓		✓	
2	Ennshafen	300	✓	✓		✓	
3	ALPLOG	167	✓	✓			
4	Terminal Krems	35	✓	✓		✓	
5	Cargo Center Graz	15	✓	✓			
	Total	**867**					



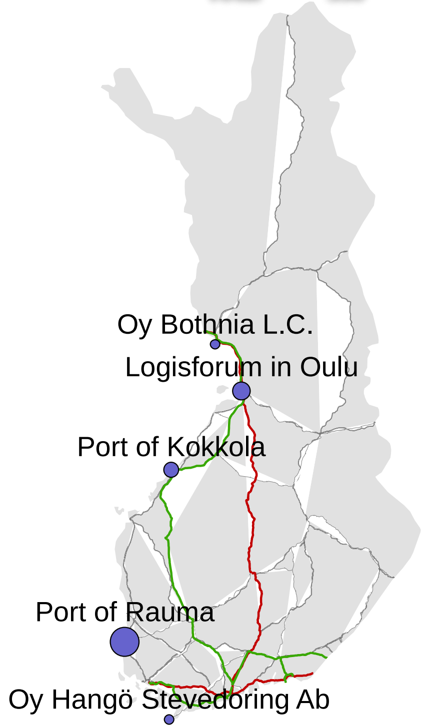
16. FINLAND

- **LIMOWA Logistics Centre Cluster** is a Finnish network association that aims to develop and support TLCs competence area.

- There are **5 TLCs** in Finland represented by this association, accounting a total surface of <u>330 Ha</u> and facilitating full <u>road-rail-maritime intermodality</u>, whilst connectivity with inland waterways and air mode is not provided.

- The <u>NeLoc Project</u> in the Baltic area promoted the development of TLCs in Finland, financed by the estate and under <u>Public-Private Partnership</u> modality.

#	Name	Ha_{TLC}	Modes				
			Road	Rail	Sea	River	Air
1	Port of Rauma	115	✓	✓	✓		
2	Logisforum in Oulu	70	✓	✓	✓		
3	Port of Kokkola	65	✓	✓	✓		
4	Oy Bothnia L.C.	40	✓	✓	✓		
5	Oy Hangö Stevedoring Ab	40	✓	✓	✓		
	Total	330					



17. CROATIA

- **CSCA** (Croatian Supply Chain Association) is an organization that was established as a national body for gathering of experts in the field of supply chain management and logistics.

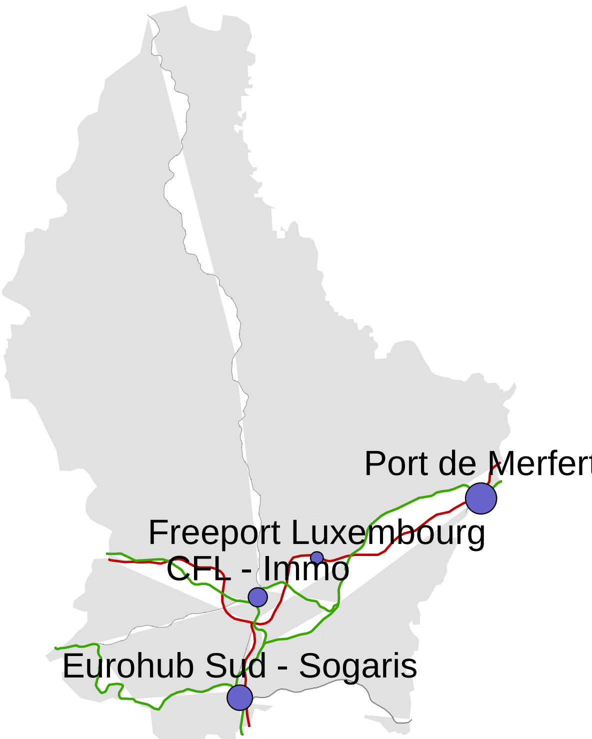
- There are **4 TLCs** in Croatia accounting a total surface of <u>465 Ha</u> and facilitating full <u>road-rail intermodality</u>, whilst connectivity with maritime mode is limited and with other modes is not provided.

#	Name	Ha_{TLC}	Modes: Road	Rail	Sea	River	Air
1	Ploce Free Zone	215	✓	✓	✓		
2	Dry Port Miklavlje	200	✓	✓			
3	Dry port Skrljevo-Kukuljanovo	40	✓	✓			
4	CroKombi Terminal Zagreb	10	✓	✓			
	Total	465					

18. LUXEMBOURG

- In Luxembourg there are **4 TLCs**, accounting a total surface of 124 Ha and facilitating full road-rail intermodality, whilst connectivity with inland waterways and air mode is also high.

#	Name	Ha_{TLC}	Modes				
			Road	Rail	Sea	River	Air
1	Port de Merfert	65	✓	✓		✓	
2	Eurohub Sud - Sogaris	52	✓	✓		✓	✓
3	CFL - Immo	4	✓	✓			
4	Freeport Luxembourg	3	✓	✓			✓
	Total	124					

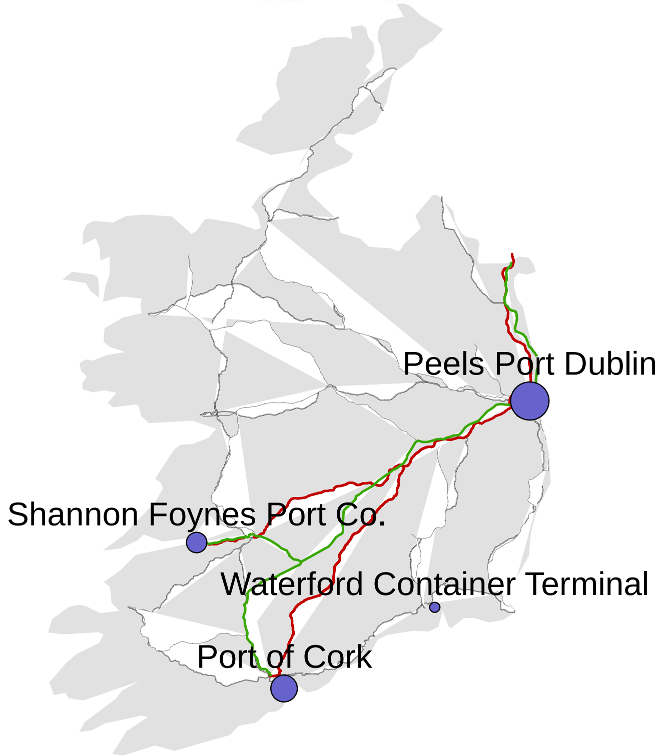


19. IRELAND

- **I.I.F.A.** (Irish International Freight Association), **C.I.L.T.** (Chartered Institute of Logistics and Transport), **N.I.T.L.** (National Institute for Transport and Logistics) and **F.T.A.** (Freight Transport Association) are the most important associations which favour freight transport and logistics service providers in Ireland.

- There are **4 TLCs** represented by these organizations, accounting a total surface of <u>55 Ha</u> and facilitating comprehensive <u>road-rail-maritime intermodality</u>, whilst connectivity with air mode is limited and with inland waterways is not provided.

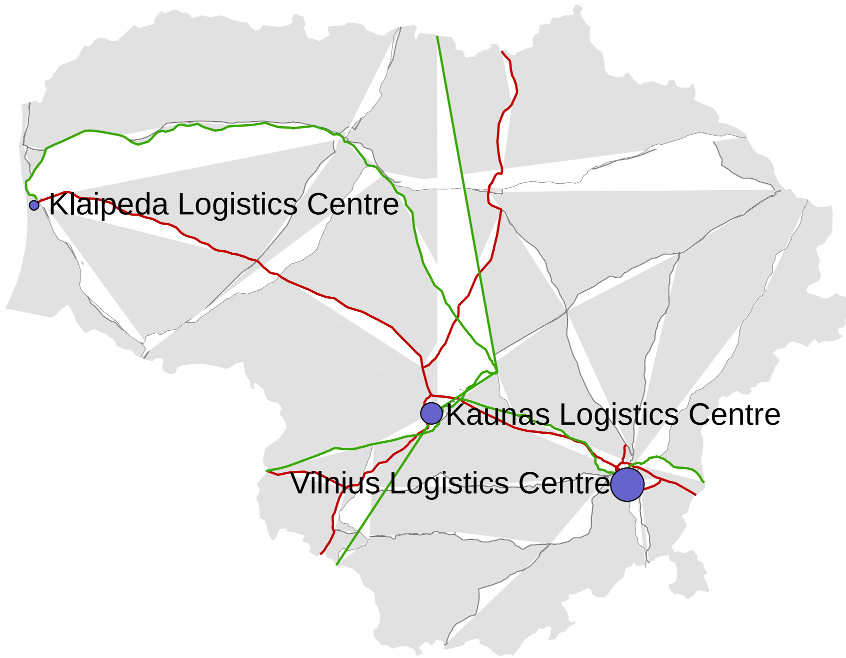
#	Name	Ha_{TLC}	Modes				
			Road	Rail	Sea	River	Air
1	Peels Port Dublin	35	✓	✓	✓		
2	Port of Cork	8	✓	✓	✓		
3	Shannon Foynes Port Co.	7	✓	✓	✓		✓
4	Waterford Container Terminal	5	✓	✓	✓		
	Total	55					



20. LITHUANIA

- **Lineka** (Lithuanian National Association of Forwarders and Logistics) represents the interests of its members in governmental, social and international organisations and develops relations with international logistics associations.
- There are **3 TLCs** represented by this organization, accounting a total surface of 592 Ha and facilitating full road-rail intermodality, whilst connectivity with other modes is more limited.
- The Logistics Centres in Lithuania are public, being Kaunas and Vilnius the most relevant examples.

#	Name	Ha_{TLC}	Modes				
			Road	Rail	Sea	River	Air
1	Vilnius Logistics Centre	300	✓	✓			✓
2	Kaunas Logistics Centre	200	✓	✓		✓	
3	Klaipeda Logistics Centre	92	✓	✓	✓		✓
	Total	**592**					

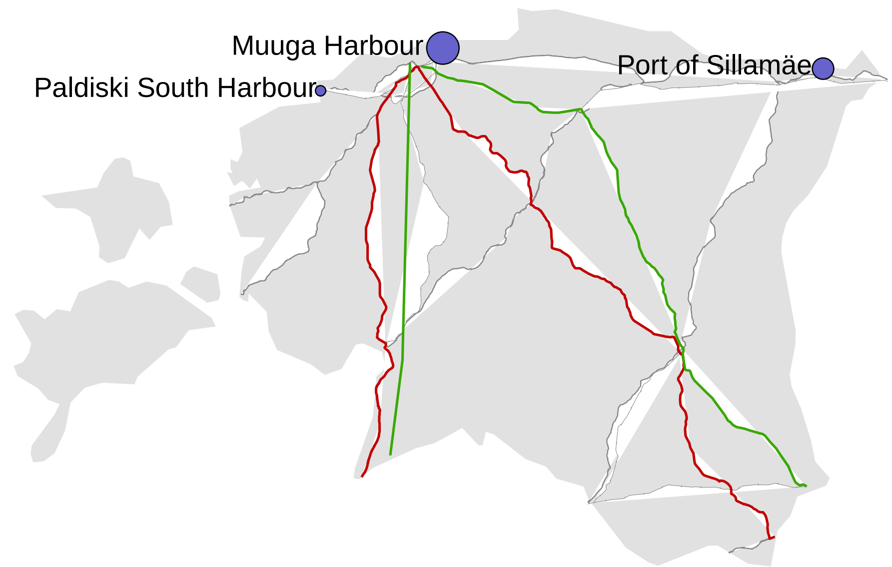


21. ESTONIA

- The **Estonian Logistics and Transit Association** represents TLCs and aims to ensure the stability and sustainable development of international logistics and transit chain passing through Estonia

- There are **3 TLCs** represented by this association, accounting a total surface of 340 Ha and facilitating full road-rail-maritime intermodality, whilst connectivity with other modes is not provided.

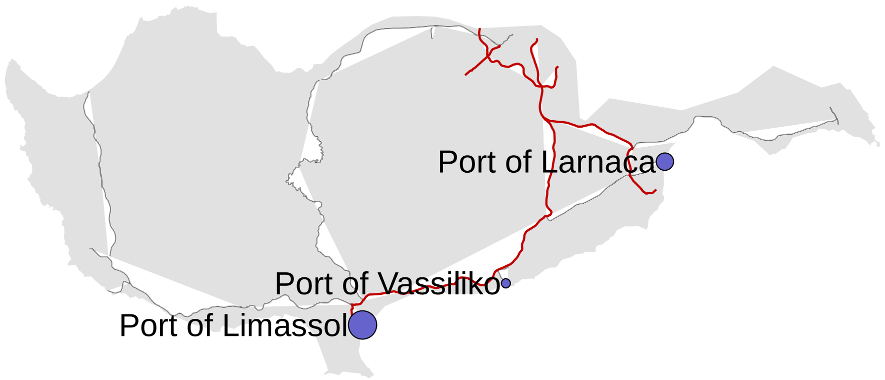
#	Name	Ha_{TLC}	Modes: Road	Rail	Sea	River	Air
1	Muuga Harbour	170	✓	✓	✓		
2	Port of Sillamäe	100	✓	✓	✓		
3	Paldiski South Harbour	70	✓	✓	✓		
	Total	**340**					



22. CYPRUS

- In Cyprus there are **3 TLCs**, accounting a total surface of 95 Ha and facilitating full road-maritime intermodality, whilst connectivity with air mode is limited and with other modes is not provided.

#	Name	Ha_{TLC}	Modes				
			Road	Rail	Sea	River	Air
1	Port of Limassol	45	✓		✓		
2	Port of Larnaca	35	✓		✓		✓
3	Port of Vassiliko	15	✓		✓		
	Total	95					



23. GREECE

- **H.C.T.A.** (Hellenic Chambers Transport Association), **H.I.T.** (Hellenic Institute of Transport), **E.E.L.** (Greek Logistics Company), **P.E.E.D.** (Panhellenic Association of Freight Forwarders) and **Association of Freight Forwarders and Logistics Enterprises of Greece** are the most important associations which favour freight transport and logistics service providers.
- There are **2 TLCs** represented by these organizations, accounting a total surface of 263 Ha and facilitating comprehensive road-rail-maritime intermodality, whilst connectivity with inland waterways and air mode is not provided.
- Greece has launched the privatization process of its ports and this could influence the landlord and management model of its TLCs.

#	Name	Ha_{TLC}	Modes				
			Road	Rail	Sea	River	Air
1	Port of Thassaloniki	155	✓	✓	✓		
2	Port of Piraeus	108	✓	✓	✓		
	Total	263					

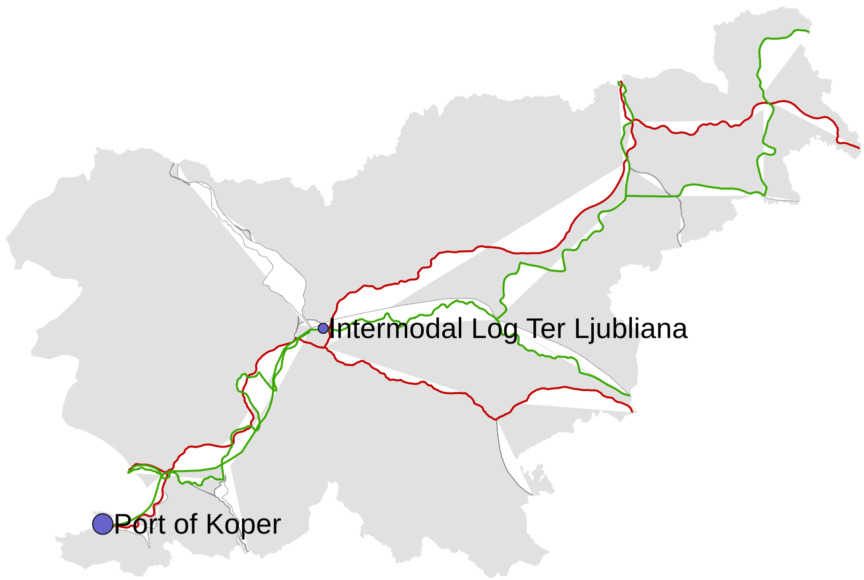
24. SLOVENIA

- The **Slovenian Logistic Association** is a free, independent and non-profit organisation of members and supporters. It aims at acting and networking on the field of transportation, traffic and business logistics.

- There are **2 TLCs** represented by this association, accounting a total surface of 158 Ha and facilitating full road-rail intermodality, whilst connectivity with air mode is limited and with other modes is not provided.

- The Logistics Centres in Slovenia present a public management model.

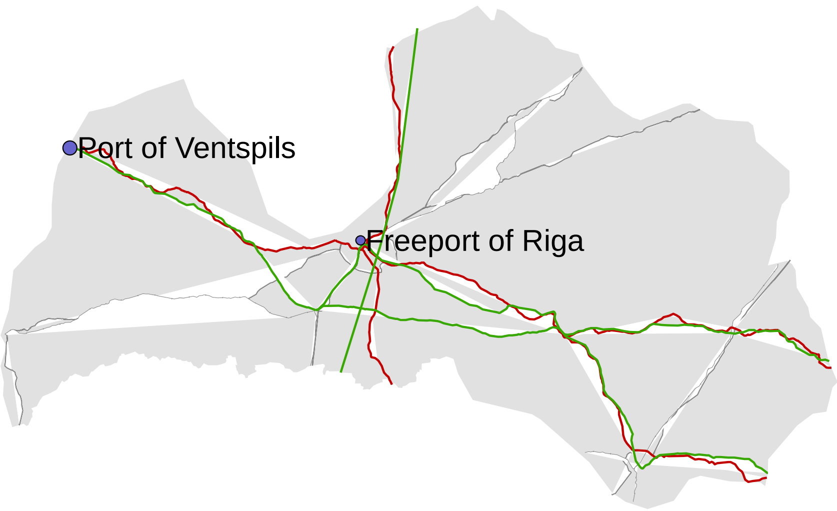
#	Name	Ha_{TLC}	Modes				
			Road	Rail	Sea	River	Air
1	Port of Koper	110	✓	✓			✓
2	Intermodal Log Ter Ljubliana	48	✓	✓			
	Total	158					



25. LATVIA

- **L.L.A.** (Latvian Logistics Association) is an association of legal entities and private individuals representing the logistics sector in Latvia, including a number of TLCs.
- There are **2 TLCs** represented by this association, accounting a total surface of <u>105 Ha</u> and facilitating full <u>road-rail-maritime intermodality</u>, whilst connectivity with other modes is not provided.
- TLCs in Latvia are financed by <u>Public-Private Partnerships</u>.

#	Name	Ha_{TLC}	Modes				
			Road	Rail	Sea	River	Air
1	Port of Ventspils	65	✓	✓	✓		
2	Freeport of Riga	40	✓	✓	✓		
	Total	105					



26. MALTA

- The **Malta Shortsea Promotion Centre** is a non-profit and non-commercial centre that collaborates and co-ordinates its activities with stake-holders within the transport and logistics industry in Malta.

- There are **2 TLCs** in Malta accounting a total surface of 89 Ha and facilitating full road-maritime intermodality, whilst connectivity with other modes not provided.

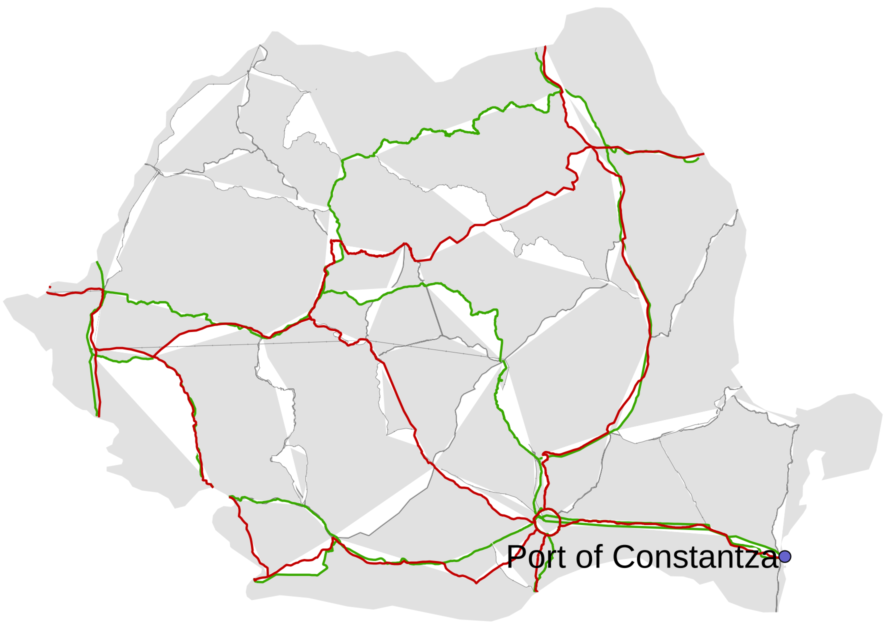
#	Name	Ha_{TLC}	Modes				
			Road	Rail	Sea	River	Air
1	Malta Freeport	79	✓		✓		
2	Valletta Gateway Terminal	10	✓		✓		
	Total	89					

27. ROMANIA

- **ARILOG** (Romanian Logistics Association) is a voluntary not-for-profit professional and educational organization dedicated to promote and develop Romanian Logistics and Supply Chain Industry.

- There is **1 TLC** with a gross surface of <u>250 Ha</u> and facilitating full <u>road-rail-maritime-inland waterways intermodality</u>, whilst connectivity with other air modes is not provided.

#	Name	Ha_{TLC}	Modes				
			Road	Rail	Sea	River	Air
1	Port of Constantza	250	✓	✓	✓	✓	
	Total	250					

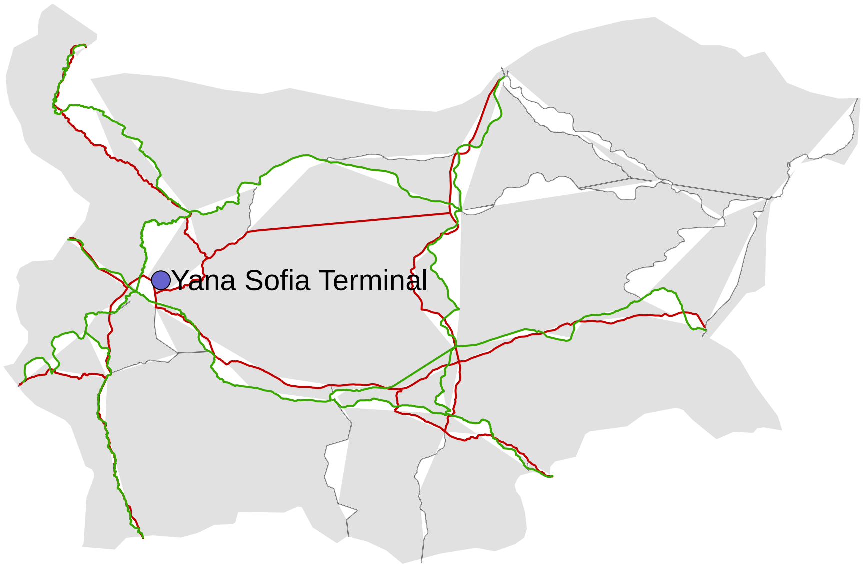


28. BULGARIA

- The **Bulgarian Association of Freight Forwarding, Transport and Logistics** is an organization that favours freight transport and logistics service providers.

- There is **1 TLC** with a gross surface of 70 Ha and facilitating full road-rail intermodality, whilst connectivity with other modes is not provided.

#	Name	Ha_{TLC}	Modes				
			Road	Rail	Sea	River	Air
1	Yana Sofia Terminal	70	✓	✓			
	Total	**70**					



Which related associations do exist in Europe?

INTRODUCTION

- A number of **European Associations/Organizations** with direct relationship with the European Freight Transport & Logistics market have been <u>benchmarked</u>:
  - F&L - European Freight & Logistics Leaders Forum
  - ERFA - European Rail Freight Association
  - EIM - European Rail Infrastructure Managers
  - CER - The Community of European Railway and Infrastructure Companies
  - ESPO - European Sea Ports Organization

- The **aims** behind this benchmarking are:
  - To confirm that there are not specific associations that <u>represent</u> TLCs at a European level apart from Europlatforms.
  - To identify other sectorial representatives that could bring <u>complementarities</u> to Europlatforms in providing added value to its members.
  - To better determine the potentiality of Europlatforms' <u>role and added value services</u> provision in relation to both its members and the European stakeholders.

The European Freight and Logistics Leaders Forum

Chaussée de Waterloo 1151, 1180 Brussels, Belgium
Tel: +44 (0) 131 557 6604 Fax: +44 (0) 131 510 0114 Email: Secretariat@EuropeanFreightLeaders.eu

1. F&L - European Freight & Logistics Leaders Forum

Foundation	1994	**Website**	http://www.europeanfreightleaders.eu/
Overview	▪ International non profit association established to bring together shippers and transport providers keen to optimise the freight supply chain across Europe. ▪ Objectives: • Promote a closer integration of various methods of freight transport by any means. • Maximise the exploitation and evolution of multimodal freight transport systems. • Improve the quality of freight transport. • Swap experiences while conforming at all times to EU competition rules.		
Services	▪ Effective networking across industries and national boundaries. ▪ Building understanding about commercial imperatives and corporate drivers. ▪ Enabling meaningful and sustainable collaboration in goods movement. ▪ Enabling freight solutions to operate in a European context without political borders. ▪ F&L sponsors 2 students every two years to attend all its meetings and get to know member companies.		
Fees	▪ Membership fees are currently set at 1.950 € per year. ▪ F&L meetings are heavily subsided by sponsorship but members also pay a fee of €350 for each of the bi-annual meetings which they attend. Attendance of spouse/partner is included in this fee. No other fees are payable.		
Members	▪ Europe: 18 countries, namely Austria, Belgium, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Italy, Ireland, Luxembourg, Spain, Sweden, Switzerland, the Netherlands, Turkey and the UK.		

2. E.R.F.A. - European Rail Freight Association

Foundation	2002	**Website**	www.erfa.be
Overview	▪ Objectives: • Promoting a competitive and innovative single European railway market with attractive, fair and transparent market conditions for all railway companies. • Achieving sustainable transport, moving more freight and passengers off the roads and onto rail. • Making the 4th Railway Package, rail freight corridors and TEN-T networks a success by seizing the opportunities they create and by feeding back experience and ideas for improvement to all. • Supporting ERTMS (European Rail Traffic Management System) to make rail transport safer and more competitive by deploying ERTMS-fitted rolling stock wherever it is sustainable. • Minimizing climate change and its members contribute to the reduction of environmental effects by delivering highly attractive customer services, therefore shifting cargo into train.		
Services	▪ To support its members in case of problems affecting their individual business. ▪ To raise the members' understanding of EU initiatives and ongoing activities by providing them direct access to EU ad hoc events, meetings but also regular working groups.		
Fees	▪ Full membership: Board member 25.000 Euro/year; Ordinary member 10.000 Euro/year; Associations 5.000 Euro/year ▪ Associate membership: Member 5.000 Euro/year.		
Members	▪ Europe: Members from14 countries, namely Switzerland, Belgium, Czech Republic, Bulgaria, France, Germany, The Netherlands, Italy, France, Poland, Sweden, Austria, UK, Lithuania.		

3. E.I.M. - European Rail Infrastructure Managers

Foundation	2002	**Website**	www.eimrail.org
Overview	▪ Established following the liberalization of the EU railway market to promote the interests of independent rail infrastructure managers in the EU and the EEA. ▪ Based in Brussels, EIM is registered as an international, non-profit association under Belgian law. It is one of 10 European railway organizations recognized by the EC as a 'representative body from the railway sector. As such, EIM supports the work of the European Railway Agency (ERA) in various working groups and occupies a seat on its Administrative Board. ▪ The role of EIM is to provide a single voice to represent its members (independent infrastructure managers, IMs) vis-à-vis to the relevant European institutions and sector stakeholders. EIM also assists members to develop their businesses through the sharing of experiences and contributing to the technical and safety activities of the European Rail Agency (ERA).		
Services	▪ Promoting the development, improvement and efficient delivery of rail infrastructure in the EU. ▪ Committing to make liberalization a success in the countries where it has been implemented. ▪ Representing its members' political, technical and business interests to all relevant EU institutions. ▪ Supporting the business development by providing a forum for cooperation. ▪ Providing an environment for the leaders of IMs for sharing best practices and efficiency tools.		
Fees	▪ ----		
Members	▪ Europe: Members from 11 countries, namely Spain, Denmark, Sweden, Belgium, Norway, United Kingdom, The Netherlands, Portugal, France, Finland, Poland.		

4. C.E.R. - Community of European Railway and Infrastructure Companies

Foundation	1988	**Website**	www.cer.be

Overview	▪ CER's objectives are to contribute to a regulatory environment enhancing business opportunities for European railway and railway infrastructure companies. ▪ Based in Brussels, it represents the interests of its members to the European Parliament, European Commission and Council of Ministers, as well as to other policy-makers and transport stakeholders. ▪ CER joined the EC's online register of interest representatives. ▪ Members are European railway undertakings, their national associations as well as infrastructure companies.
Services	▪ <u>Lobbying by Quality</u>: In close co-operation with its members, CER monitors and evaluates the implementation of policies, and propose adjustments to legislation to address ongoing problems. ▪ <u>Communicating the Railways</u>: CER aims to present the sector's positions to European institutions, the public and CER members. ▪ <u>Dialogue with partners</u>: CER builds stable relationships based on active and transparent dialogue between the sector and the European institutions.
Fees	▪ ----
Members	▪ <u>EU</u>: more than 70 members from Sweden, United Kingdom, Bulgaria, Latvia, Switzerland, Czech Republic, Hungary, Luxembourg, Moldova, Romania, Portugal, Germany, Denmark. ▪ <u>Non EU</u>: members from Norway, Switzerland, Moldova, the candidate countries (Macedonia, Montenegro, Serbia and Turkey) as well as from the Western Balkan countries.

5. E.S.P.O. - European Sea Ports Organization

Foundation	1993	**Website**	www.espo.be

Overview	▪ In 1974, the EC set up a Port Working Group with Europe's major ports. Early 1993, the ESPO was born out of this working group, as an independent lobby for seaport interests. ▪ Established in Brussels, ESPO focuses on a variety of policy and technical issues. ▪ In 2009 ESPO set up a joint office with EFIP, the European Federation of Inland Ports. ▪ Objectives: • To ensure that the economic importance of European ports is <u>recognised</u> in the EU and its Member States and that the sector is consulted substantively on any measure likely to affect it • To promote free and fair <u>competition</u> in the port sector; • To ensure that European ports play their full part in delivering <u>economic efficiency</u>; • To promote the highest possible <u>safety</u> standards in European ports; • To encourage ports to be proactive in protecting the <u>environment</u>.
Services	▪ ----
Fees	▪ ----
Members	▪ <u>Europe</u>: members in 26 countries, namely Belgium, Bulgaria, Croatia, Cyprus, Denmark, Estonia, Finland, France, Germany, Greece, Ireland, Italy, Latvia, Lithuania, Malta, Netherlands, Norway, Poland, Portugal, Romania, Slovenia, Spain, Sweden, United Kingdom, Albania, Iceland. ▪ <u>Others</u>: Israel.

WHY EUROPLATFORMS?

WHY EUROPLATFORMS?

Where do we come from?

BACKGROUND

- EUROPLATFORMS was **established** on 18th December 1991 and it is to date the only European Association of Freight Villages and Logistics Centres. It was conceived as a non-profit organisation, meaning that the membership fee should solely go to activities that creates added value for its members.

- Its main **purpose** is to promote and expand the concept of T&L Centres in Europe and worldwide, and to create and develop relationships among existing T&L Centres in Europe and with similar groupings internationally. Additionally, it has throughout the years developed and improved the definition of T&L Centres, which has been approved, by EU, UNECE and OECD and widely approved and used by many national authorities.

- After almost two decades of fruitful contribution to the European sector of T&L Centres, EUROPLATFORMS' level of **activity** has progressively decreased over the last years due to a number of reasons. Its ambition is to become again a key player in boosting and supporting the European T&L market in general and the T&L Centre sector in particular.

- At present, EUROPLATFORMS is furthermore involved in the development of new activities in the context of the new Trans European Transport Network, and encouraging the European Transport & Logistics Centres and Associations to become new members.

MEMBERSHIP

- EUROPLATFORMS comprises members from different **European countries**. These can be either national associations or individual T&L Centres in those countries where there are not representative associations.

- Some countries are no longer present, but EUROPLATFORMS is always open for new members, as long as the T&L Centres live up to the definition on its By-Laws.

- **Prerequisites** that the Centres have to live up to, are the following ones:
  - Be operational, meaning that it should be in function.
  - Act as bridge builder to other T&L Centres within the country.
  - Where possible, facilitate the integration of EUROPLATFORMS' ideas and concepts into its own infra- and suprastructure as well as in the national T&L Centre planning.

- As of October 2015 the **members** included 7 countries, representing approximately 80 Transport & Logistics Centres all over Europe, in which over 1.800 transport and logistics companies operate.

SWOT ANALYSIS

WEAKNESSES	THREATENS
• Low level of activity of Europlatforms over the recent years. • Loss of Europlatforms' representativeness within the European T&L Centres market.	• Loss of relevant support and investments to T&L Centres over the coming years. • Loss of differentiation on product, service and quality, entering competition on price.
STRENGTHS	**OPPORTUNITIES**
• Representativeness of a sector with a relevant role and impact at a national, regional and local levels, and track-record in supporting and facilitating a more efficient and sustainable transport system. • Only sectorial association within Europe.	• Regular revision of TEN-T criteria and core network. • EU investment plans (Juncker - €315bn) with particular focus on transport infrastr. • Growing global recognition of the T&L Centres' key role (LatAm, Asia, etc.).

WHY EUROPLATFORMS?

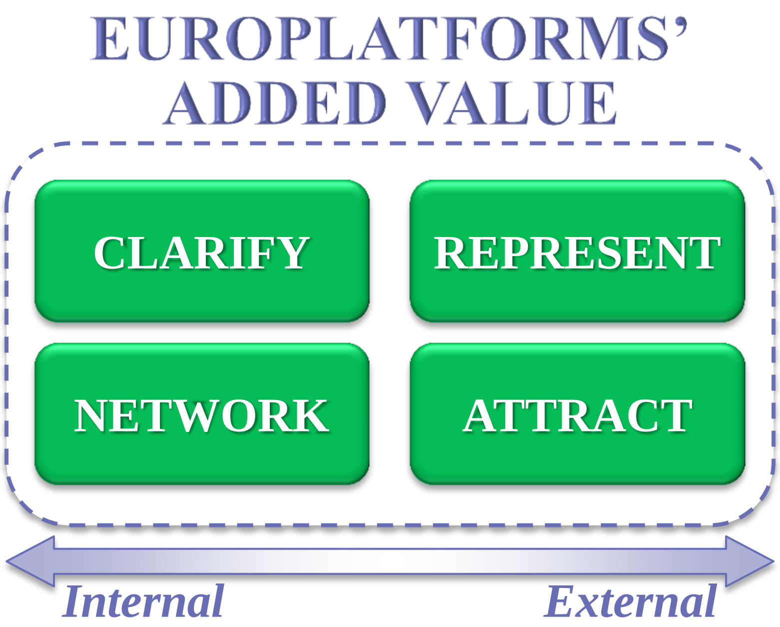
What do we want to achieve?

VISION ⇨ *Generalize and consolidate global "awareness and recognition"*

- To be able to generalize and consolidate global **awareness and recognition** of T&L Centres as an essential element of a more efficient and sustainable transport and logistics system at any scale, ready to play a key role in the planning, development and operation of transport and logistics networks, and capable to generate relevant positive impacts at an economical, social and environmental level.

MISION ⇨ *Provide real "added value"*

- To **provide real added value** to Europlatforms' associated T&L Centres in particular and to the European and international T&L Centres' market in general, by accurately clarifying what this particular sector is and generates, properly representing it in front of the market stakeholders, widely networking its TLCs with other European and international T&L Centres of interest, and constantly attracting relevant interest, support and investments into their development and operation.



Which will be our focuses?

STRATEGIC GUIDELINES AND ACTIVITIES

CLARIFY by mean of specific **studies**.

Those elements that **characterize** what TLCs are what are their future trends

- ✓ Detailed inventory of European TLCs, including description of its main characteristics: lay-out, functional design, management model, etc.
- ✓ Benchmarking of best practices in design and management models and criteria for “state of art” TLCs in terms of efficiency, intermodality, sustainability, etc.

Those elements that **differentiate** TLCs from non-specialized facilities

- ✓ Quantitative and qualitative analysis of TLCs’ role and impact from an economical, social, sectorial and environmental perspective.
- ✓ Lobbying in front of the EC (Eurostat) in order to achieve the recognition of a specific activity code for T&L Centres (eg., different from residential land use).

- ✓ Definition and implementation of a specific “sustainability” certification methodology/tool for TLCs (economical, social, sectorial and environmental).

REPRESENT TLCs in front of key market **stakeholders**.

Relevant **institutions**: EC, EU Parliament, OECD, UN, ….

- ✓ Active involvement in official <u>policy-making and technical discussions</u> on sectorial issues (TEN-T, etc.).
- ✓ Lobbying in obtaining <u>"official" recognition</u> (like ESPO in front of EC).
- ✓ Participation in EU part-financed development <u>projects</u>.
- ✓ Offer <u>technical advice</u> regarding sectorial issues (market/feasibility studies, etc.).

Interesting **market players**: T&L operators, Tpt. Infra. Managers, suppliers, investors, developers, ..

- ✓ Organization of sectorial and technical <u>meetings</u>, support in <u>negotiation</u>, etc.
- ✓ Offer <u>technical advice</u> regarding sectorial issues (market/feasibility studies, etc.).

Recognised sectorial **associations**: Europeans (ESPO, ...) and internationals (WLCPO, ...)

- ✓ Participation in International <u>Forums</u>, sectorial <u>round tables</u>, etc.

Which will be our focuses?

ATRACT to facilitate **development and operation**.

Interest from economic and social stakeholders

- ✓ Pro-activity in relation to marketing activities, articles and publications, news on the Medias, etc.

Financial support from investors and lenders

- ✓ Organization of technical/commercial meetings with Infrastructure Funds (Norwegian Fund,…), Multilaterals (EIB,…), Banks, etc. on financing and investments conditions, etc.

Operational support in the development and operation

- ✓ Definition and signature of MoU with Governments: national and regional.
- ✓ Definition and signature of MoU with key players: T&L Operators, Tpt. Infra. Managers, suppliers, developers, etc.

NETWORK to **connect** TLCs and promote know how **exchange**:

Regular **internal meetings**

- ✓ Planning of Europlatforms Exec Board quarterly meetings at different locations.
- ✓ Celebration of Europlatforms' members bi-annual Forum.

Internal (and external) **communication** initiatives

- ✓ Draw-up of six-monthly e-newsletters covering: Europlatforms activities, presentation of 2-3 TLCs, news of interest, etc.

Twinning initiatives

- ✓ Facilitation of partnerships among associated TLCs.
- ✓ Promotion of know-how exchange.

Link with **international players**

- ✓ Promote meetings with international TLCs, associations, operators, investors, etc