WORKSHOP ON THE LOGISMED LOGISTICS PLATFORMS AND THE LOGISTICS PLATFORM NETWORK

Barcelona, 19 September 2016

Minutes of the Meeting

A workshop on the Logismed logistics platforms and the logistics platform network was held at the Abba Sants Hotel in Barcelona on 19 September 2016. It was organized by CETMO in close collaboration with the European Investment Bank (EIB). All the beneficiary countries of the Logismed Soft initiative were present at the meeting (Tunisia, Jordan, Morocco, Egypt and Algeria), represented by the ministries responsible for transport and logistics and the key stakeholders in the logistics sector of those countries (AMDL, Suez Canal, Logitrans). Also present were representatives from European logistics platform associations (Europlatforms, GVZ, ACTE-CIMALSA), representatives from international organizations (EIB, World Bank, UfMS), and the organizations responsible for implementing the Logismed Soft initiative (CETMO, GOPA).

This workshop was a key activity in Component I of Logismed Soft: Coordination, Promotion and Network. The main objective of this workshop was to present and discuss the reports titled "Guidelines for the Implementation of the Euro-Mediterranean Logistics Platform Network (EMLPN)" and "Guide for the Establishment of the Logismed Logistics Platforms (LLPs)" with a view to developing a shared vision among the Logismed Soft initiative partners and industry experts concerning the definition of the physical features of the LLPs and the services to be offered, and the feasibility of a logistics platform network. These two reports were drafted by Ignasi Ragàs and Felipe Manchón in close cooperation and with guidance from experts from CETMO and the EIB.

These minutes are presented as a summary of the main points discussed at the workshop and the conclusions reached by the participants, though this summary will not provide a verbatim account of all the comments made. This document also contains an appendix with the agenda of the workshop, a list of the participants and the presentations given.

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1. The expert from the EIB, as the promoter of the Logismed Soft initiative, opened the session with a word of welcome and thanked the participants for attending. He briefly outlined the objectives of the initiative and explained that the workshop was part of this initiative and the efforts currently being undertaken by the bank in its work to support the countries in the implementation of modern logistics platforms. However, the expert from the EIB stressed the importance of being realistic about the major challenge involved in the initiative, i.e. the effective implementation of logistic platforms. The expert from the EIB then handed the floor to CETMO, which has been selected by the EIB to implement some of the Logismed Soft activities.

To that end, the technical director of CETMO emphasized the role of the initiative to guide and support national logistics strategies. The two reports revealed some best practices in other

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parts of the world, experiences that the countries can reproduce and adapt to their own realities.

2. The objectives and structure of the workshop was then presented (PPT #1), and the participants briefly introduced. The meeting continued with a presentation about the state of the art of logistics platforms (PPT #2); this presentation focused on cases in which logistics platforms have been implemented, the participation of public and private stakeholders in platforms and the challenges involved in bringing logistics platform projects to fruition.

3. After this initial presentation, the country representatives described the logistics sector in their respective countries and the key stakeholders involved in its development, major projects involving logistics platforms that are operational, in progress or at the study stage, and finally, the results and the lessons learned for the sector at national level (PPT #3, #4, #5, #6 and #7).

Although each country has its own specific characteristics, these presentations revealed some similarities between all the logistics sectors in the region. These include the large number of stakeholders in the sector, which requires close coordination between them; the low rate of outsourcing, which should be increased in order to improve the professionalization of the sector; and the important disparity between the number of logistics platform projects that are in progress or at the study stage and the small number of logistics platforms that are operational in these countries, a gap that reflects the problems associated with making logistics platform projects a reality.

4. The German logistics association GVZ and the Spanish association ACTE then presented cases of successful European logistics platforms and stressed the importance of location and the positive impacts of developing logistics platforms (PPT #8 and #9).

5. The experts then presented the “Guide for the Establishment of the Logismed Logistics Platforms (LLPs)” (PPT #10). This presentation was divided into four sections. The first focused on the types of logistics platform users and linked them to the different strategic objectives of platforms. The second part detailed the technical features required in modern logistics platforms and highlighted the importance of flexibility in the design process. The third dealt with the service types and classified them according to their level of need. The last section focused on possible institutional models and the implementation and management of logistics platforms. The presentation demonstrated that there is no single platform model or management mode and that each project has its own unique characteristics. However, all implementation processes follow key milestones that must be respected.

After the presentation, the participants gave their opinions on the report (one of the key objectives of the workshop). The beneficiary countries expressed their satisfaction with the quality and usefulness of the report, which outlines the steps involved in implementing logistics platforms and reveals the key problems and challenges that have to be tackled during this process. Several countries requested that certain passages in the French version of the report should be revised for greater clarity; CETMO will ensure this is done and will also introduce the specific comments that the countries must submit to CETMO before the end of September.

During a discussion about the report, some participants asked about the production of an executive summary. This could be distributed to interested parties and stakeholders, including

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policy makers in the beneficiary countries. The discussion also addressed the importance of the location of logistics platforms according to their activities.

6. After lunch, the meeting focused on the subject of the network. The expert presented the report "Guidelines for the Implementation of the Euro-Mediterranean Logistics Platform Network (EMLPN)" (PPT #11). The proposed network described in the report originated from a concept that was launched in 2008 and has been adapted to the current situation. This report proposes that the network be designed as a forum for exchanging experiences and technical assistance in the platform implementation process, and as a tool to stimulate and disseminate logistics policies in the Mediterranean countries. Furthermore, it should be based on logistics platforms and hubs, and should have the capacity to include other public and private stakeholders involved in the logistics improvement process. The experts who drafted the report stressed that this network concept will only be useful if the stakeholders who form part of it are entirely convinced of its value and are therefore committed to implementing it.

To complete the subject of the network, Europlatforms presented a success story involving a logistics platform association that extends beyond national boundaries (PPT #12).

The meeting continued with a discussion the possibility of moving ahead with the creation of such a network. The discussion initially focused on the objective of the network: to share knowledge and experience. Most countries indicated that they did not currently support the implementation of such a platform network. The reasons cited included poorly defined and premature aspects, such as financial support for the network and the prior obligation to have platforms in place; from this point of view, the countries would prefer to focus on the construction of logistics platforms before creating a network. However, they showed an interest in sharing knowledge and experience (the main objective of the Logismed platform network). In conclusion, it would appear that the participants are more enthusiastic about the option that involves moving the network towards a knowledge network that brings together experts from the different countries. In this respect, the network of experts of the GTMO 5+5 was cited as an example.

There was another interesting discussion about the extent of the network: a network made up of the countries in the Southern Mediterranean or a network that brings together north and south. The representative from Europlatforms was asked about the possibility of the different national logistics associations collaborating with Europlatforms (once they are created). The Europlatforms representative expressed his willingness to explore this option, given that logistics knows no borders. Nevertheless, it is important to note that Europlatforms' objectives are very different from those for which the Euro-Mediterranean logistics platform network of the Logismed Soft initiative was originally designed.

7. To conclude the workshop, CETMO summarized the main ideas and observations concerning the two reports:

- The "Guide for the Establishment of the Logismed Logistics Platforms (LLPs)" was deemed very useful, especially for the final implementation of logistics platforms; however, some small corrections are required. Moreover, the countries are required to submit their comments to CETMO before the end of September so that they can be introduced, before assessment, in the final version. On the other hand, CETMO will draft an executive

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summary given the interest of this proposal. CETMO and the EIB will also study the possibility of publishing the reports in order to increase their reach.

- With respect to the proposed network presented in the report "Guidelines for the Implementation of the Euro-Mediterranean Logistics Platform Network (EMLPN)", the logistics platform situation in the region is not developed enough and the countries would prefer the first step to involve the creation of a network for exchanging knowledge in the field of logistics. This network would have a lighter structure than the original proposal. However, it remains to be seen how this newly proposed network will be implemented.

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Agenda

09.00-9.15	Welcome and launching of the meeting
09.15-9.30	Objectives and structure of the workshop
09.30-9.40	Round table: *Introduction of each participant*
9.40-11.30	State of the art of logistics platforms and developments in the Euro-Mediterranean region
	9.40-10.10. Definition and added value of logistics platforms. Benchmark of achievements worldwide. Difficulties encountered for implementing platforms in developing countries
	10.10-11.00. Presentation of state of the art, projects and achievements in beneficiary countries
	11.00-11.30. European experiences on logistics platforms
11.30-12.00	Coffee-break
12.00-12.45	Presentation of the technical guide on logistics platforms
12.45-13.30	Open session for comments from the floor
13.30-15.00	Lunch
15.00-15.30	Presentation of the model of network of logistics platforms
15.30-16.00	Presentation of European platform network experiences
16.00-16.30	Open session for comments from the floor
16.30-16.50	Summary. Next steps and roadmap proposal
16.50-17.00	Closing of the workshop

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Presentations

PPT #1: Objectives and Structure of the Workshop

PPT #2: State of the Art of Logistics Platforms

PPT #3: Tunisia: State of the Art

PPT #4: Jordan: State of the Art

PPT #5: Morocco: State of the Art

PPT #6: Egypt: State of the Art

PPT #7: Algeria: State of the Art

PPT #8: GVZ

PPT #9: ACTE

PPT #10: Guide for the Establishment of the Logismed Logistics Platforms (LLP)

PPT #11: Guidelines for the Implementation of the Euro-Mediterranean Logistics Platform Network (EMLPN)

PPT #12: Europlatforms

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WORKSHOP ON
THE LOGISMED LOGISTICS PLATFORMS
AND A NETWORK OF LOGISTICS PLATFORMS

Objectives and organization of the workshop

Objectives of the workshop

1. Present the main results of the two reports prepared by the EIB and distributed in July:

a. Guide for the establishment of the Logismed Logistics Platforms (LLPs)

b. Guidelines for the Implementation of the Euro-Mediterranean Logistics Platform Network (EMLPN)

2. Validate the contents and propositions of the reports.

3. Know the initial position of the participating countries concerning the creation of a Euro-Mediterranean Logistics Platforms Network (EMLPN)

Organization of the workshop

1. Morning session dedicated to **"Guide for the establishment of the Logismed Logistics Platforms (LLPs)"**

2. Afternoon session dedicated to **"Guidelines for the Implementation of the Euro-Mediterranean Logistics Platform Network (EMLPN)".**

Contributions expected from Mediterranean Partner Countries

1. **Morning session:**

10:10-11:00 **Presentation of state of the art, projects and achievements in beneficiary countries** (10 minutes per country).

12 :45-13 :30 **Open session for comments from the floor on Guide for the establishment of logistics platforms.**

2. **Afternoon session**

16 :00-16 :30 **Open session for comments from the floor on the model of Euro-Mediterranean logistics platform network** (5 minutes per country)

The participants' folder includes a **questionnaire to know the countries initial position concerning the proposed model network**. It is contemplated to receive a feedback from this questionnaire **ideally at the en of the workshop**.

Practical issues

1. **Languages**. The workshop will be held in English and French with simultaneous translation.

2. **Meals**. A coffee-break (morning) and a lunch in the workshop hotel will be offered by the organization. The menu has been chosen considering diets particularities.

3. **Technical visit**. Tomorrow morning at 8:45h we will wait you at the hall of Acta CITY47 Hotel to go to CIM Vallès logistics platform, where a technical visit has been organized. We expect to return to hotel around 13h.

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State of the Art in the Logistics Platforms. Results and Challenges

The concept of logistics platform

Key aspects:

- A defined complex with groups of logistics, goods transport and service operators.
- Centralized management.
- Specially designed areas and infrastructure for logistics activities.
- Restrictions on non-logistics activities.
- Linked to linear or nodal infrastructure.
- Specialized services.
- Open to the market.

"A defined area within which all activities relating to transport, logistics and the distribution of goods, both for national and international transit, are carried out by various operators". *Europlatforms*

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The developmental context and the evolution of logistics platforms

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LOGISTICS PLATFORM EVOLUTION PROCESS

Phase I : Urban roots projects: local requirements

Phase II: Industry-specific or corporate projects: pooling of implementation solutions

Phase III: Regional development projects: key facilities for the competitiveness of the region

LOGISTICS INSTITUTIONALIZATION PROCESS IN DEVELOPING COUNTRIES

Phase I: Trade facilitation within borders: port and airport reforms, border investment, customs reforms, security

Phase II: Strategies - countries with integrated logistics throughout the entire value chain

CURRENT SITUATION: GROWING INTEREST IN THESE PLATFORMS IN DEVELOPING COUNTRIES BECAUSE THEY ARE SEEN AS MANDATORY PROJECTS TO BECOME COMPETITIVE AT THE NATIONAL AND INTERNATIONAL LEVEL

The current challenge of logistics platforms in developing countries:

→Progress in their implementation

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Strategic function of platforms

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The central dilemma of logistics areas in market economies

- The field of logistics requires large areas in strategic locations and cannot compete for these spaces with more profitable uses .
- ***Risk:*** its systematic eviction from the strategic locations.
- ***Challenge:*** to structure platform projects that provide logistics operators with access to strategic locations at affordable prices.

Logistics does not allow for speculation:

- Logistics activity requires cost optimization and is under constant pressure.
- Logistics activities cannot afford speculative cost of spaces (land, warehouses, etc.).

Platforms in recently developed European countries (South Europe)

For logistics integration, these countries have implemented platforms in recent decades in order to catch up in terms of competitiveness with central countries..

- These platforms have played an important role in disseminating logistics development, creating the skilled supply required by international operators.
- The logistics property market advanced in parallel, starting with the national central hubs and then the regional hubs.
- Currently, the main initiatives: intermodal connectivity projects.

The "logistics developer" management model approach

- Some platforms in Southern Europe have implemented a complementary approach to management as "logistics developers", i.e. facilitators of improvement and development projects and collaborative actions, a meeting point between supply and demand, and promoters of value-added services…

LP in developing countries

Example: Latin America

- In the last decade: central planning of logistics platform systems.
- The scope of the logistics property sector is limited to the markets of large metropolitan areas.
- The platform needs cover all areas.

The logistics sector still has a long way to go in these countries:

- Logistics institutions must be consolidated (in a few cases, they already exist).
- Public-private dialogue.
- Disseminate the culture of developing platforms and promoting the experience to manage them in government departments.
- Project structuring, etc.

In other developing countries, the need for specialized logistics infrastructure (logistics platforms) is also widespread and is due to the dynamism of international trade caused by the globalization of their economies.

Functional design of LP

Logistics zones:

- Warehouses for logistics operators and services.
- Maximum logistics functionality or Class-A.
- Different types.
- Some logistics areas are specialized or belong to a cluster: exceptions.

Service zones:

- 1 to 5 ha.
- Distinguish platforms from conventional logistics parks.
- Vehicle services and service centres.
- Foreign trade services (customs and customs-related services).

Intermodal zones:

- Rail intermodality.
- Often include container terminals.

Platform sizes:

- The recommended minimum: 25-30 hectares.
- Space for future expansion.

Dual strategic function:

- **Main function: to provide specialized areas and infrastructure.**
- **Complementary function: a breeding ground for logistics development.**

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Public sector involvement in logistics platform development

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Strategic reasons for the public sector involvement:

- High-value strategic locations (ports or airports)
- Intermodality
- To increase the quality/security standards
- Spaces for segments unfulfilled or poorly covered.
- To organize urban logistics
- Low-profit services
- Land with logistics potential but an insufficient dynamic
- To structure LP throughout the territory
- In exceptional cases, competitive prices

Without the various forms of public sector assistance, almost no strategic, complex or important logistics platforms would see the light of day

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Public sector: level of involvement

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Type of public stakeholder	Nature of involvement
National governments	Stages A to E.
Regional governments	Stages A to E.
Councils and local governments	Stages A and B.
Specialized or industry-specific public entities or agencies	Stages A to E.
Public logistics platform entities	Stages A to E.
Public or parapublic associative entities (chambers of commerce, investment promotion entities, etc.)	Minority
Public or semi-public financial sector	In funding the project.

Level of public involvement
A. Processing and approval of the project
B. Provision of the land
C. External or off-site-mural connections (roads, railways, service infrastructure)
D. General land development
E. Selective construction of services
F. Construction of warehouses

Without the various forms of public sector assistance, almost no strategic, complex or important logistics platforms would see the light of day

Private participation in LP

The involvement of the private sector is also essential:

- Required levels of investment.
- Good connections with the demands of the logistics market.
- A platform should be managed according to private sector criteria.

Limitations:

- Interest in logistics warehouse parks.
- Very selective markets and metropolitan areas.
- Low-risk, short-term projects with limited dimensions .
- Little interest in strategic projects.
- Huge problems for acquiring land in the strategic locations.

Private sector involvement in platforms? A basic distinction:

- Logistics operators, transport and freight handling companies: clients.
- Estate developers specialised in logistics (immo-logistics) and investors: management of logistics platforms, never provide logistics services.

The profile of potential private sector stakeholders

Type of private stakeholder	Nature of involvement
Property or logistics property developers	▪ "Natural" candidates for developing platforms. ▪ Problem: their lack of experience in public platforms in developing countries.
Investors or investment funds	▪ Willing to invest only in mature stages of the projects. ▪ They are highly selective in developing countries.
Service, logistics and transport operators	▪ Generally, their direct participation as partners is not recommended. ▪ They may act as sub-concessionaires for highly specific services.
Land owners	▪ Accelerating or facilitating the total or partial management of plots.
Financial entities	▪ Always necessary on the project's financing level. ▪ They rarely become direct project partners.
Professional associative entities	▪ In some cases they require to be directly involved as partners in the projects.

It is not possible to speak in general terms of private sector participation: each type of stakeholder has its own function.

Basic business model for a logistics platform

Revenue of the company that develops a logistics platform:

- **Logistics property revenue:** associated primarily with the rental or sale of land or warehouses.
- **Revenue for delivering,** in the case of direct provision by the affiliate company.

Platforms and service delivery

- In a platform, logistics and transport services are provided by the clients based in the platform, not by the management company.
- The platform facilitates the delivery of as many services as possible, but only directly provides complementary services.

The fundamental business model of a platform is the landlord model:

- **Rent or sell spaces.**
- **Outsource services.**

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Business model in the functional areas

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Logistics centres: Basic profile of the private logistics property business:

- The construction of warehouses (standard or "built to suit").
- Rent them to clients.
- A critical aspect of the logistics centre business model is financing: The land regime and the structure of the financial market in the country are important aspects.

Service centre:

- services, essential in public sector platforms, often have a contribution in revenues.

Intermodal terminals:

- From the developer's point of view, this element exceptionally pays for itself.

Consequences for the overall business balance of the platform: need of a public contribution:

A. Contribution of the land

B. Investments in development of the land and/or external connections.

C. Specific contributions for the investment of some of the most loss-making units.

The final balance of a public sector platform is that it hardly achieves a point of profitability attractive enough for the private logistics property investors.

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Platforms relationship with other logistics hubs

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LP and ports: The establishment of port LP must be considered **a priority** for developing countries.

Rail intermodality and LP: Two different situations:

- Countries with an integrated rail system: intermodal LP.
- Countries whose rail system is based on poorly integrated lines: difficulties for multi – operators platforms.

Air freight centres: Only airports that reach a specified freight volume need specific platforms.

Logistics platforms, with their physical centralization of operators and services, constitute one of the pillars for promoting the freight concentration involved in intermodality.

Platforms as "service centres"

Types of services:

➢**Basic services:** Park service (infrastructure, security, waste collection, environmental services, etc.).

➢**General services:** services for personnel, vehicles and companies (Service Centre, Truck Centre, etc.).

➢**Functional logistics services:** intermodal services, customs and foreign trade services, telematics services, etc.

➢**Cluster or value-added services:** "soft" services that help enhance LP:

- Foreign trade services
- Technological projects and initiatives
- Strengthening of non-logistics value-added services
- Guidance and facilitate relationships with government departments
- Collaborative logistics initiatives

A logistics platform must be configured as a real service conglomerate or centre.

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Contribution of LP to logistics development

- **Contribution to the development of logistics national entities and logistics policies.**
- **Contribution to the development of the logistics and goods transport sector.**
- **Contribution to the development of the private logistics property sector.**
- **Contribution to the development of logistics sustainability.**
  - With respect to territorial development
  - With respect to transport
  - With respect to construction and storage

Logistics platforms: a breeding ground for logistics development.

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Challenges to progress in the materialization of LLP projects

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- Institutions for logistics promotion are still underdeveloped.
- The planning framework for the strategic and conceptual definition of projects is still weak.
- It is necessary to move forward in creating a collaborative culture between public and private sectors involved in logistics. Sometimes they ignore or are suspicious of each other.
- The role of the different private sectors involved in logistics platforms is often not well defined.
- The stakeholders involved must strengthen their capacities and knowledge on the process required to implement LP.
- Complexities associated with land reservation difficult progressing on certain projects.
- Institutions involved in the development of LP projects have sometimes insufficient resources or capacities to become real “logistics developer”.

An error to avoid:

“We are going to create a logistics centre as a driver for development”

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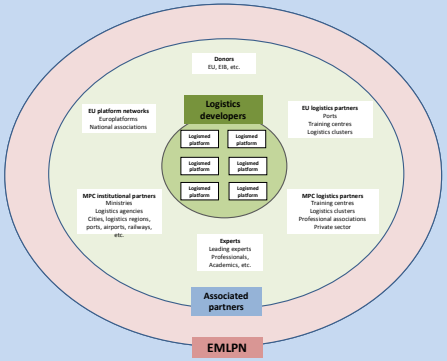
We have progressed…
…but we still have a long way to go

Two instruments for facilitating to progress in the materialization of LP projects are proposed:

Guide for the establishment of the Logistics Platforms

Euro-Mediterranean Logistics Platform Network



They are tools to <u>define</u> technical and service <u>standards</u> in order to strength project <u>implementation capacities</u> and facilitate the <u>exchange of experience</u>.

République Tunisienne
Ministère du transport

LOGISMED

Atelier sur les plateformes logistiques

La logistique en Tunisie

Barcelone le 19 septembre 2016

Vision stratégique et priorités du secteur

Le modèle économique tunisien

A – Une politique d'intégration

- Un modèle économique basé en grande partie sur une intégration profonde avec ses partenaires économiques.

- le développement des liens commerciaux et économiques et des IDE est le principal axe de cette intégration.

- Les politiques d'intégration adoptées lors des deux dernières décennies ont permis de générer d'importants bénéfices économiques.

- L'expérience de la Tunisie a montré que l'intégration est un important levier de développement des échanges et d'accroissement des IDE et un facteur d'innovation et de développement technologique et peut être un moteur important de croissance de la productivité.

Le modèle économique tunisien

B – Les investissements directs et les exportations: Deux piliers de l'économie nationale

- Le commerce contribue à hauteur de plus de 40 % dans la croissance et
- Les exportations représentent plus que 45 % du PIB.
- Le marché européen reste toujours la destination la plus importante pour les exportations avec plus de 75 % du total des exportations totales. Les importations de l'Europe dépassent les 55 % du total des importations tunisiennes.
- Le commerce occupe une place importante dans le modèle de développement économique.
- Un système efficace de transport et logistique est indispensable pour être un véritable levier du développement des échanges.

Le modèle économique tunisien

C – Un système de transport et de logistique au service des échanges et des IDE

- La consolidation de la capacité du réseau de transport avec ses différents modes et l'adaptation du système Logistique national pour mieux gérer les chaines d'approvisionnement locales et internationales sont une condition sine qua non pour la conquête des marchés à l'export et l'attraction d'investissements en Tunisie, sources d'emplois et de croissance économique durable.

- la Tunisie est appelée, de ce fait, à renforcer et adapter ses infrastructures et améliorer le niveau de sa logistique pour répondre aux exigences du développement.

Stratégie sectorielle

- Consciente du rôle stratégique du secteur du transport et de la logistique, la Tunisie a fait preuve au cours des dernières années d'une forte volonté d'investir et de poursuivre les investissements dans ce domaine.

- Pour ce faire, trois niveaux de planification et d'intervention ont été arrêtés :

✓ les actions urgentes,
✓ le plan de développement 2016-2020, et
✓ la vision a long terme (Plan Directeur).

Actions urgentes – Principales priorités

- Rattraper, au plus vite, le retard dans la réalisation de projets structurants,

- Améliorer l'efficacité des ports et notamment le port de Rades et mise en œuvre d'un plan d'action avec des objectifs en termes de délais de séjour des marchandises, de l'attente en rade et de productivité des opérations de manutention,

- Engager des projets pilotes de zones d'activités logistiques et la mise en œuvre des actions relatives aux aspects institutionnels et au renforcement de capacités et l'organisation des métiers de la logistique.

Grandes orientations du plan 2016-2020

- Développer le secteur du transport ferroviaire
- Développer l'infrastructure de transport et de la logistique et encourager le partenariat public privé
- Accorder une attention particulière à la qualité des services rendus, à la qualité totale et à la sécurité et sureté du transport,
- Améliorer l'efficacité du système logistique avec un objectif de réduction du cout de la logistique et amélioration du classement de la Tunisie par rapport à l'indice de performance logistique,
- Adopter les systèmes intelligents de transport et de logistique par l'utilisation des NTIC pour un transport durable.

Plan 2016-2020 – Objectifs spécifiques à la logistique

- Amélioration du classement mondial de la Tunisie dans l'IPL: passage du 110éme rang en 2014 au 60éme rang en 2020,
- Réalisation d'une enveloppe d'investissement de l'ordre de 1800 Millions DNT pour l'aménagement de 580 ha de zones logistiques (avec une participation de 60% du secteur privé)
- Développement du marché de la logistique par :
  - ✓la mise à niveau des prestataires des services logistiques,
  - ✓l'amélioration du niveau de l'externalisation des services logistiques de 10% à 20%,
- La création de 30 milles emplois,
- La réduction des émissions de CO2 de 20 % à l'horizon 2020,
- L'amélioration de la part de la logistique dans le PIB de 4.5 % en 2010 à 5.5% en 2020,
- Contribution à l'accélération de la croissance de 0.5 point fin 2020.

Plan directeur à l'horizon 2040

- Un nouveau Plan Directeur National des Transports (PDNT) qui permettra un recadrage des outils de planification du secteur pour lui permettre de jouer pleinement son rôle de catalyseur de la croissance économique.
- Ce Plan Directeur couvrira 10 problématiques:

1. Desserte régionale
2. Réseau routier structurant
3. Desserte ferroviaire inter-frontières
4. Transports urbains et régionaux
5. Transports dans le Grand Tunis
6. Transport maritime et desserte portuaire
7. Transport aérien et desserte aéroportuaire
8. Logistique
9. Sécurité de transport
10. Financement des transports

Plan directeur à l'horizon 2040

- **Pour la problématique liée à la logistique,** il s'agira de:

- ✓ vérifier la pertinence de la stratégie adoptée jusqu'ici pour le développement de la logistique en Tunisie et sa cohérence avec le nouveau contexte économique et social du pays,
- ✓ réviser, le cas échéant, les plans de mise en œuvre, en vue d'améliorer les chances de leur concrétisation à moyen et long termes.

Stratégie logistique et plan d'action à moyen terme

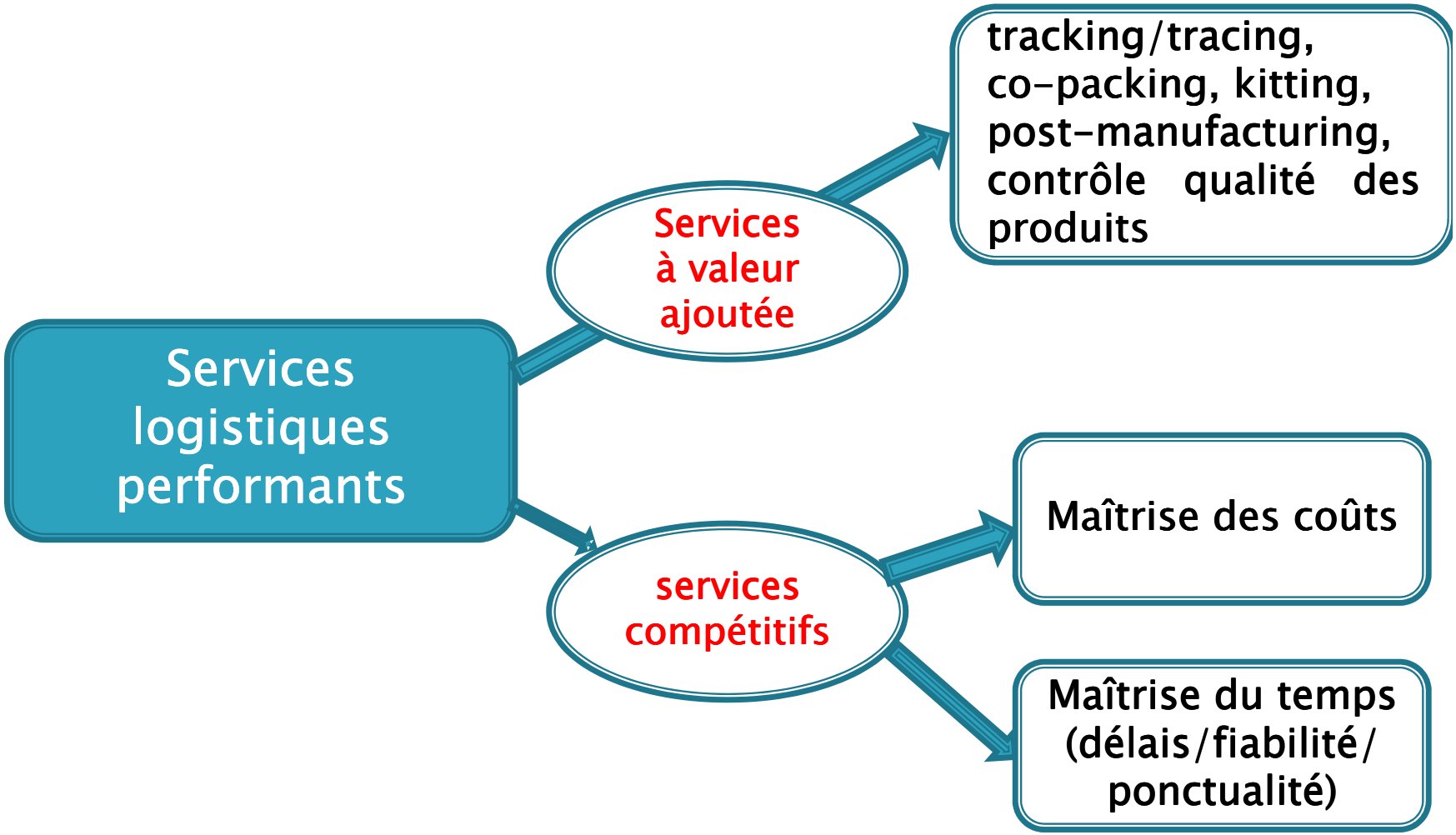
La logistique est un facteur clef de compétitivité

❖ La maîtrise de la logistique est devenue un facteur stratégique d'avantages concurrentiels.

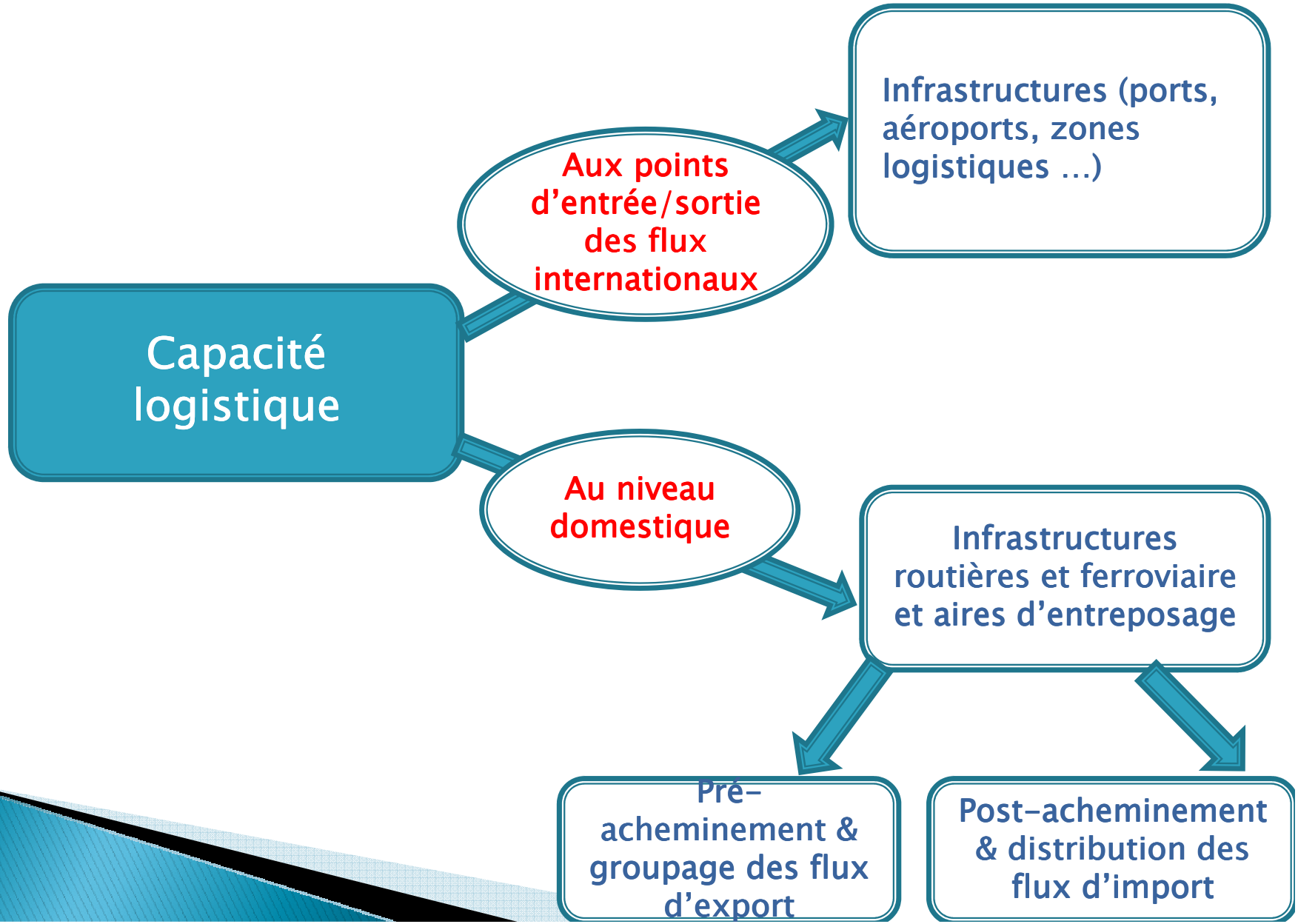
❖ L'entreprise peut consolider sa compétitivité sur la scène internationale par une logistique performante à travers :

- la réduction des coûts opérationnels notamment le transport de longues distances et le stockage.
- l'utilisation optimale des aires de stockage (espace vertical allant jusqu'à 6 niveaux).
- l'utilisation des NTIC.
- l'externalisation de services logistiques.

Conditions préalables d'un système logistique efficace



Conditions préalables d'un système logistique efficace



Initiatives de facilitation de la chaîne logistique

1

Réforme du Secteur Portuaire : Réforme dockers, mise en concession des terre pleins, spécialisation des ports, Refonte du cadre réglementaire et institutionnel : code des ports maritimes , loi sur les concessions ,loi sur les PPP.).

2

La dématérialisation des formalités de commerce extérieur : liasse unique, liasse transport (Intégration des documents douaniers et du titre de commerce)

3

Efforts d'amélioration de la productivité :

- **Acquisition des equipments de manutention,**
- **Programme de mise à niveau du personnel d'exploitation et de maintenance,**
- **Automatisation de la gestion des flux des conteneurs et remorques au port de Radés (acquisition en cours d'un TOS et d'un système de gestion des gates),**
- **Mise en place d'une nouvelle organisation pour l'application d'un travail 24/24h.**

Les Gisements d'amélioration

❖ Maitrise du coût de la logistique :

• 20% du PIB contre 15% dans les pays d'économies similaires.

16 % CA de l'entreprise exportatrice (opérant dans les secteurs du textile et du câblage) contre 11 % dans les pays Européens.

❖Développement des infrastructures de stockage et massification des flux.

❖ Amélioration de la performance des transports :

➡ *Transport Routier :*

✓ Rapprochement de l'offre et de la demande,

✓meilleure organisation du transport pour compte d'autrui,

✓ Augmenter la part des opérateurs tunisiens dans le transport routier international.

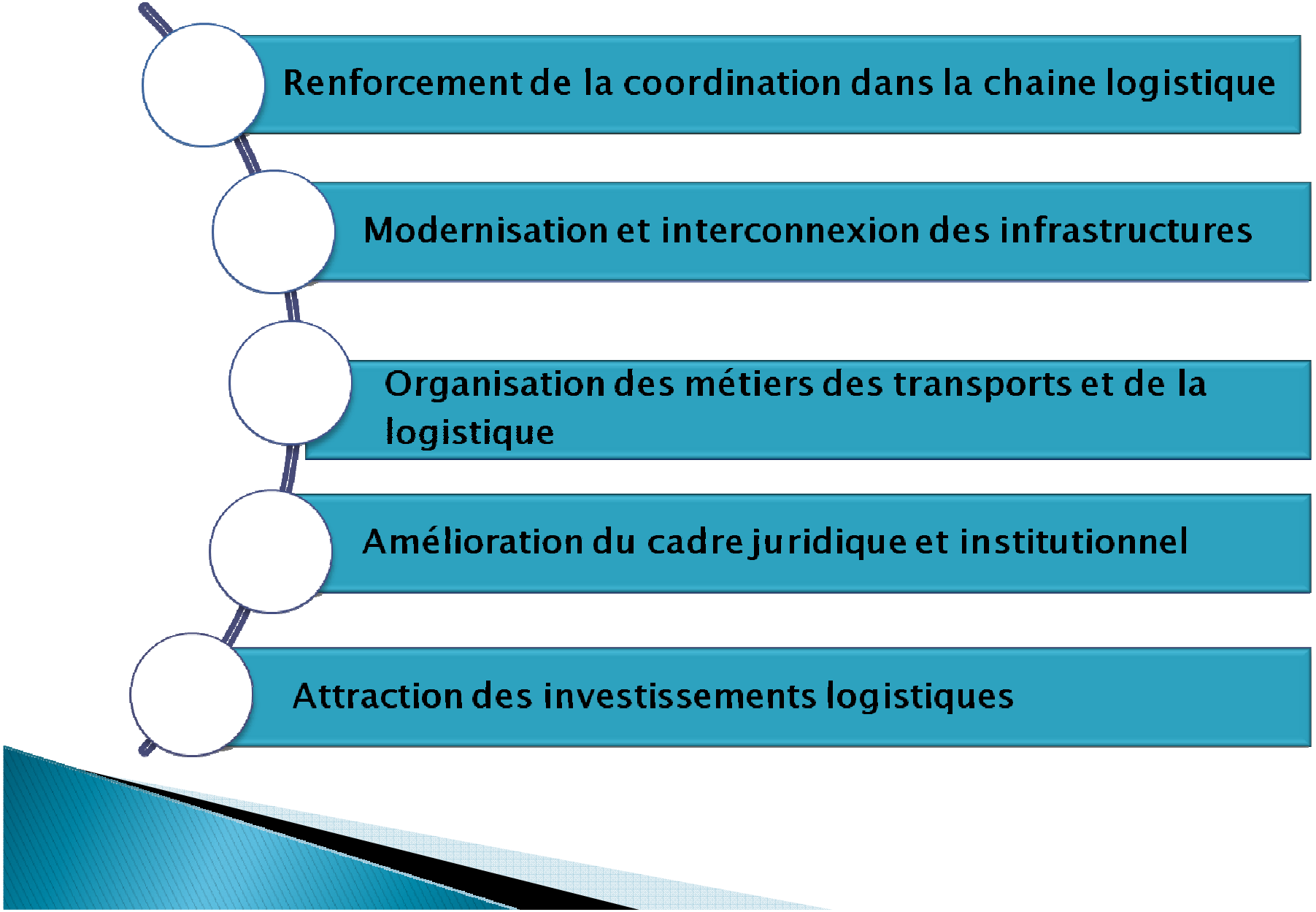
➡ *Transport Aérien* : Développement du fret aérien.

➡ *Transport Maritime*: Amélioration de la performance des opérations portuaires.

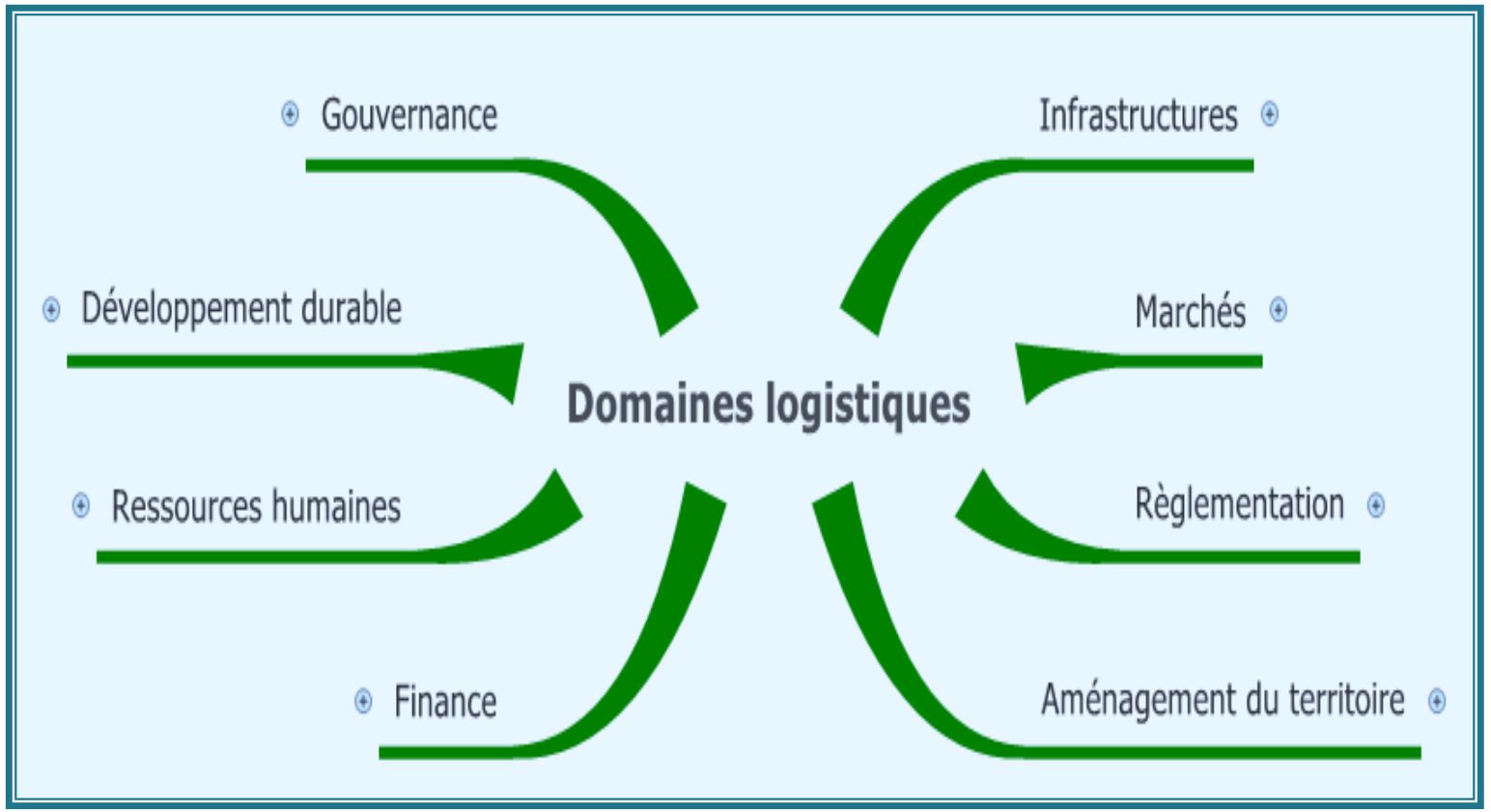
Les objectifs de développement de la Logistique en Tunisie

- Développer le dispositif national de la logistique et répondre aux attentes du marché, tant domestique qu'international.
- Positionner la Tunisie comme un acteur régional de la logistique méditerranéenne.
- Développer le savoir-faire et les compétences nationales, promouvoir les métiers du transport et de la logistique.
- Développer l'externalisation des prestations logistiques auprès de prestataires de services logistiques.
- Compléter les infrastructures en créant un port de transbordement en eaux profondes et un réseau de plateformes logistiques.
- Améliorer le maillage routier et ferroviaire.
- Coordonner l'action publique en matière de logistique.

Stratégie de développement de la logistique en faveur de promotion des exportations et des IDE



Logistique : un domaine d'interaction complexe



Besoins croissants de coordination pour la mise en œuvre de la stratégie de développement de la logistique

Les principaux acteurs de la logistique en Tunisie

Le secteur public:

Administrations :

- Ministère chargé du Transport.
- Ministère chargé de l'Aménagement du Territoire.
- Ministère chargé des Finances (Douanes).
- Ministère chargé de l'Industrie et du Commerce.
- Ministère chargé de l'Agriculture.
- Ministère de l'Enseignement Supérieur et de la recherche scientifique.
- Ministère de la Formation Professionnelle et de l'Emploi.

Entreprises et sociétés publiques : **OMMP, STAM, CTN, SNCFT, ...**

Le secteur privé :

- industriels et agriculteurs,
- professionnels : Transitaires, Transporteurs, prestataires de services à valeurs ajoutées...
- Les associations professionnelles.

Importance des zones logistiques

✓Massification des flux:
amélioration du taux de remplissage entre 15 et 20%.

«Le taux de remplissage à l'échelle nationale est de l'ordre de 65% »

✓Réduction des coûts opérationnels par Ton/Km entre 10-20% pour le transport de longues distances

«Le taux de retour à vide en Tunisie est de 47% (taux assez élevé) »

Principaux avantages des Zones Logistiques

✓ Réduction des coûts de stockage entre 20-30%

✓ Utilisation optimale des aires de stockage (espace vertical allant jusqu'à 6 niveaux.

✓Utilisation des NTIC

Projets de zones logistiques programmées pour la période 2016/2020

Lieu	Superficie (en hectares)	Coût (en Million de dinars)
Radès (Ben Arous)	47	200
Enfidha (Sousse)	300	900
Ghannouch (Gabès)	30	100
Bir M'charga (Zaghouan)	100	300
Zarzis (Medenine)	100	300
Total	**577**	**1800**

Merci pour votre attention

Logistics Sector in Jordan

Workshop on Logismed Logistics Platforms LLPs & EuroMed Logistics Platform Network EMLPN

Barcelona, 19th September 2016

Eng. Nourhan Shuqman , EU Affairs Advisor

Ministry of Transport

Content

- Country Background
- Current Status of Transport and Logistics Sector
- Logistics Platforms Projects
- Major Stakeholders
- Main Issues & Concerns
- Logismed Project Challenges

Country Background

- Jordan is in the geographical key position for transports between Saudi Arabia and Europe, Iraq and Egypt, Red Sea and the Mediterranean Sea.
- Jordan is striving to promote investment and modernize the transport infrastructure

- Transport contributes 8.6 % of GDP , 10% of manpower - (2014)
- About 9,500,000 inhabitants, High rate of urbanization 83% - (2016)
- More than 655,000 registered Syrian refugees, 700,000 non registered

Current Status of Transport and Logistics Sector

Transport Infrastructure

- One sea port located in Aqaba on the Red Sea

Several development expansions and regeneration projects are currently ongoing to enhance competitiveness, increase capacity, upgrade efficiency and good quality of services

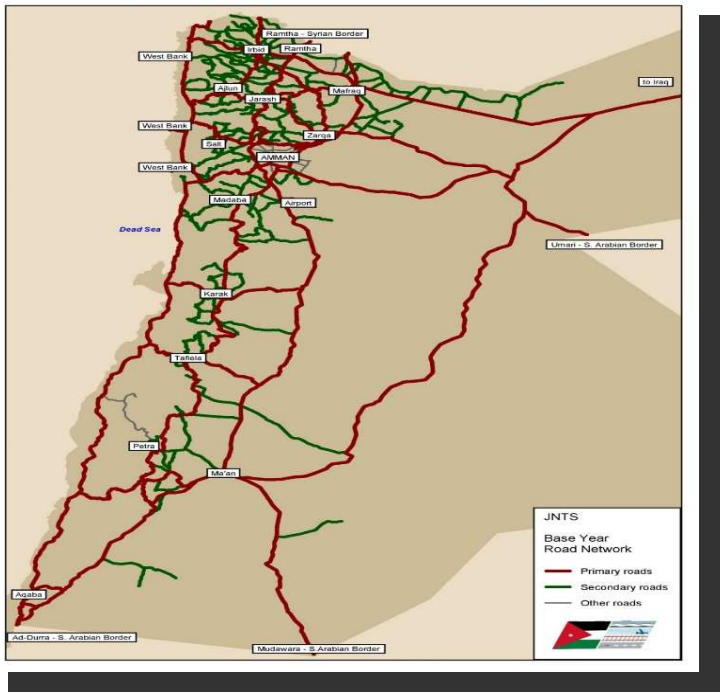
Main Port Zone

Container Port Zone

Industrial Port Zone

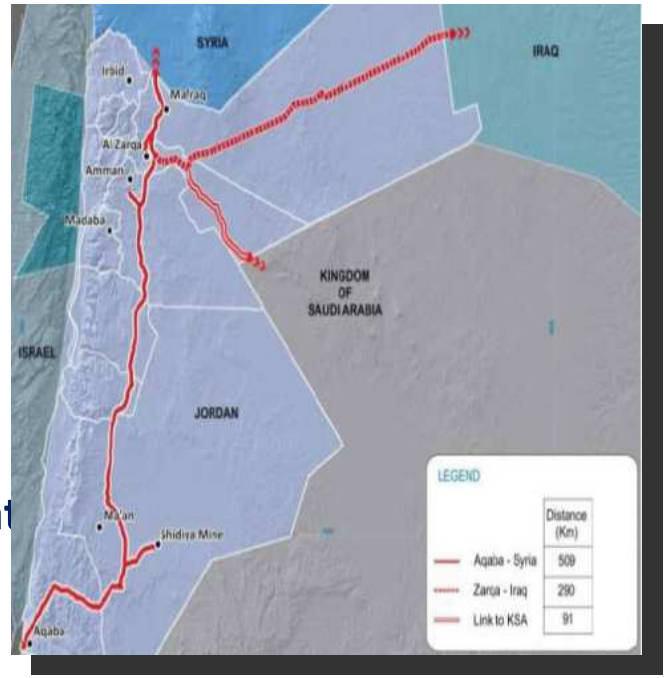
Current Status of Transport and Logistics Sector

- Three international airports under developments:
  - ✓ Queen Alia International Airport - Amman
  - ✓ Amman Civil Airport - Amman
  - ✓ King Hussein International Airport - Aqaba
- A road network of 8000 km (main, rural, side) under further developments
- 10 land border crossings used for movement of passengers and goods - upgrading process
- Two railway corporations:
  - ✓ Aqaba Railway Corporation (ARC), transferring phosphate from mines to Aqaba port
  - ✓ Jordan Hejaz Railway Corporation (JHRC), not in operation, only tourist rides



Current Status of Transport and Logistics Sector

- A new railway network for freight is underway to connect the nation's key cities (Amman, Mafraq, Zarqa) to the port of Aqaba – Finance Challenges



Transport Services & Logistics

- All freight transport within Jordan is presently effectuat by road transport due to the non-functioning of the rail network - A Transit Country
- Dry Ports and Logistics centers do not exist yet in Jordan
- The demand for logistics services for transit goods in Jordan is limited :

  ✓All transport is carried out by road transport, so limited demand for regional distribution centers in the hinterland of Jordan.

Current Status of Transport and Logistics Sector

✓Existing land border crossings can function as transit points (custom inspection and clearance)

✓A regional railway system might lead to an increased demand in future

•A high potential demand for providing logistic services for the consumer goods sector in Jordan, mainly close to areas of large population (Amman)

•A moderate demand for providing logistic services for industrial goods :

✓large part of the industrial goods are imported in (smaller) trucks which require less storage services

✓Existing industrial cargo flows are transported directly to the industrial zones

•Upgrading and expansion of land border crossing facilities is underway

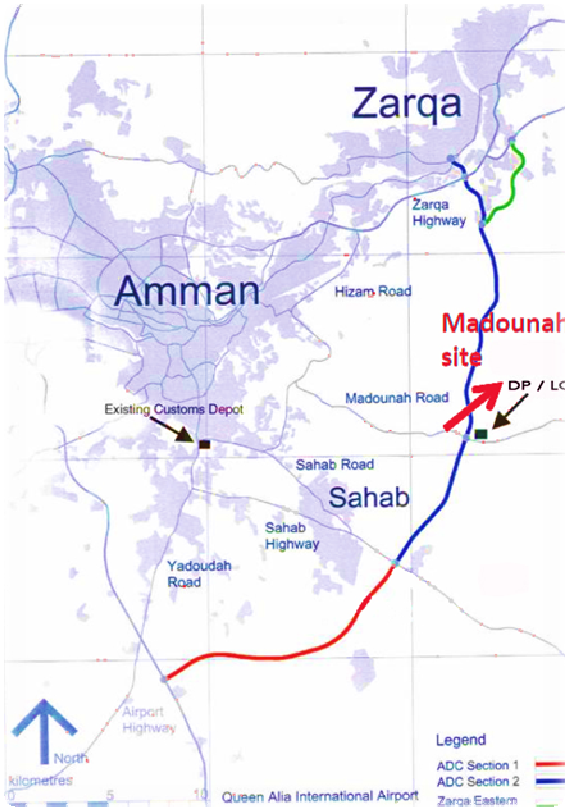
•Modernization and harmonization of Customs services is ongoing process "Single Window"

Logistics Platforms Projects

Establishing DP/LC's are important to facilitate transforming Jordan from a traditional transport system towards an advanced transport system:

The DP/LC in Amman , Madounah

- **A Technical assistance (TA) program is mobilized and financed by EIB / FEMIP Trust Fund in the context of LOGISMED initiative**
- **The ToR of the Full Feasibility Study is finalized recently for tendering**
- **The implementation of the customs center by the MoPWH is well advanced**



- **Total area of 1307 acres, located at the eastern margin of the Amman Ring Road near the junction with the road to Madounah and linked to the rail**

Logistics Platforms Projects

The DP/LC in Ma'an

•Strategic decision :

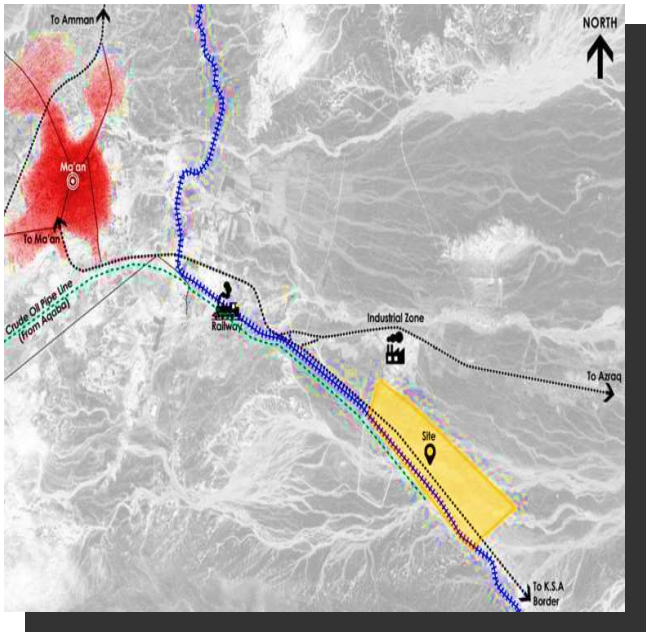
✓balance the benefits of sustainable development

✓Ease the pressure on Aqaba Container Terminal

•Total area of 1235 acres, located 8 km east of Aqaba, linking national & international routes.

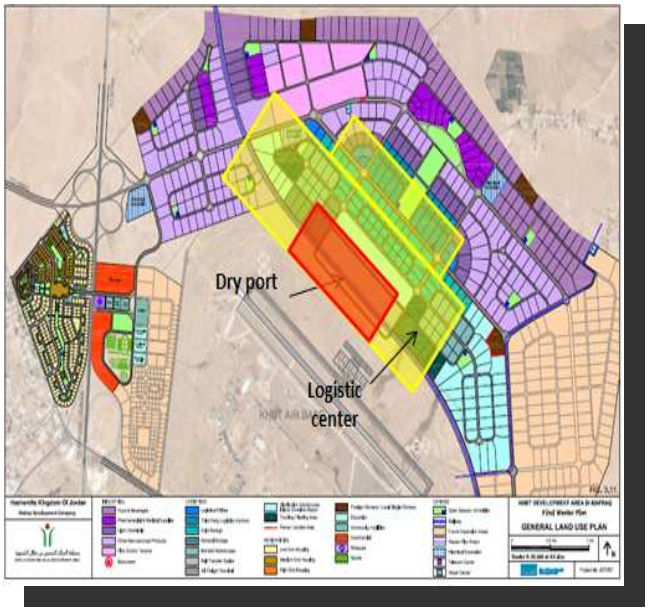
•linked to the new port of Aqaba, and Potash company in the Dead Sea through Aqaba Railway

•The tendering process is launched / Designs



The DP/LC in Mafraq

- Under development as part of the KHBT zone
- dependency on future industrial development at the KHBT zone



Major Stakeholders

- **Ministries and public institutions and parastatals concerned:**
  - ✓ **Ministry of Transport, MoT**
  - ✓ **Ministry of Public Works and Housing, MoPWH**
  - ✓ **The local Authorities(GAM), Railway Corporations, Customs Authorities**
  - ✓ **The Free Zones Administration, Port Authorities, Chambers of Commerce**
- **Transport companies, logistics operators and freight forwarders**
- **Banks and international donors**

Main issues & Concerns

The most important key issues encountered are:

- **Availability of railway system**
- **Improved transport regulations (Syrian regulation prohibits transport of transit containers)**
- **Improved border crossing procedures**
- **Facilitation of efficient custom clearance procedures at dry port locations**
- **Improved trucking regulations**
- **Strong coordination by and within public stakeholders in Jordan**
- **Lack of training / skilled labor in logistics**

Logismed Project Challenges

- The current project should make us get closer to establish LLPs
- The pace of the current project is slow
- The diagnostics phase is still not completed
- A clear roadmap to execute this project is needed
- Tangible outcomes needed at the end of this project in terms of training needs
- The issue of legislations have not been addressed

Thank You

Eng. Nourhan Shuqman , EU Affairs Advisor

Ministry of Transport

Royaume du Maroc
Ministère de l'Equipement, du Transport, et de la Logistique

Plateformes Logistiques Logismed (PLL) et Réseau Euro-Méditerranéen de Plateformes (REMPL)
-Maroc-









Younes TAZI,
Directeur Général
Agence Marocaine de Développement de la Logistique
19 Septembre 2016

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Moroccan Agency for Logistics Development

Sommaire

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Stratégie logistique nationale
Un chantier global avec des enjeux et des fronts multiples

Enjeux globaux de la stratégie

> Réduction des coûts logistiques du Royaume

> Accélération de la croissance du PIB

> Contribution au développement durable du pays

Stratégie à horizon 2030 avec des feuilles de routes établies pour chacun des axes et à différents horizons

Axes de la stratégie logistique

1 **Développement des infrastructures logistiques**

2 **Optimisation des flux de marchandises**

3 **Développement d'acteurs logistiques performants**

4 **Développement des compétences**

5 **Gouvernance et régulation adaptées du secteur**

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Un dispositif institutionnel mis en place pour renforcer la gouvernance du secteur

Renforcement de la gouvernance du secteur

> Agence Marocaine de Développement de la logistique (AMDL)

> Observatoire Marocain de la Compétitivité Logistique (OMCL)

> Board National de Coordination de la Formation en Logistique (BNCFL)

> Commission Nationale de Normalisation Logistique (CNNL) : production des premières normes en cours

Structuration de la communauté logistique

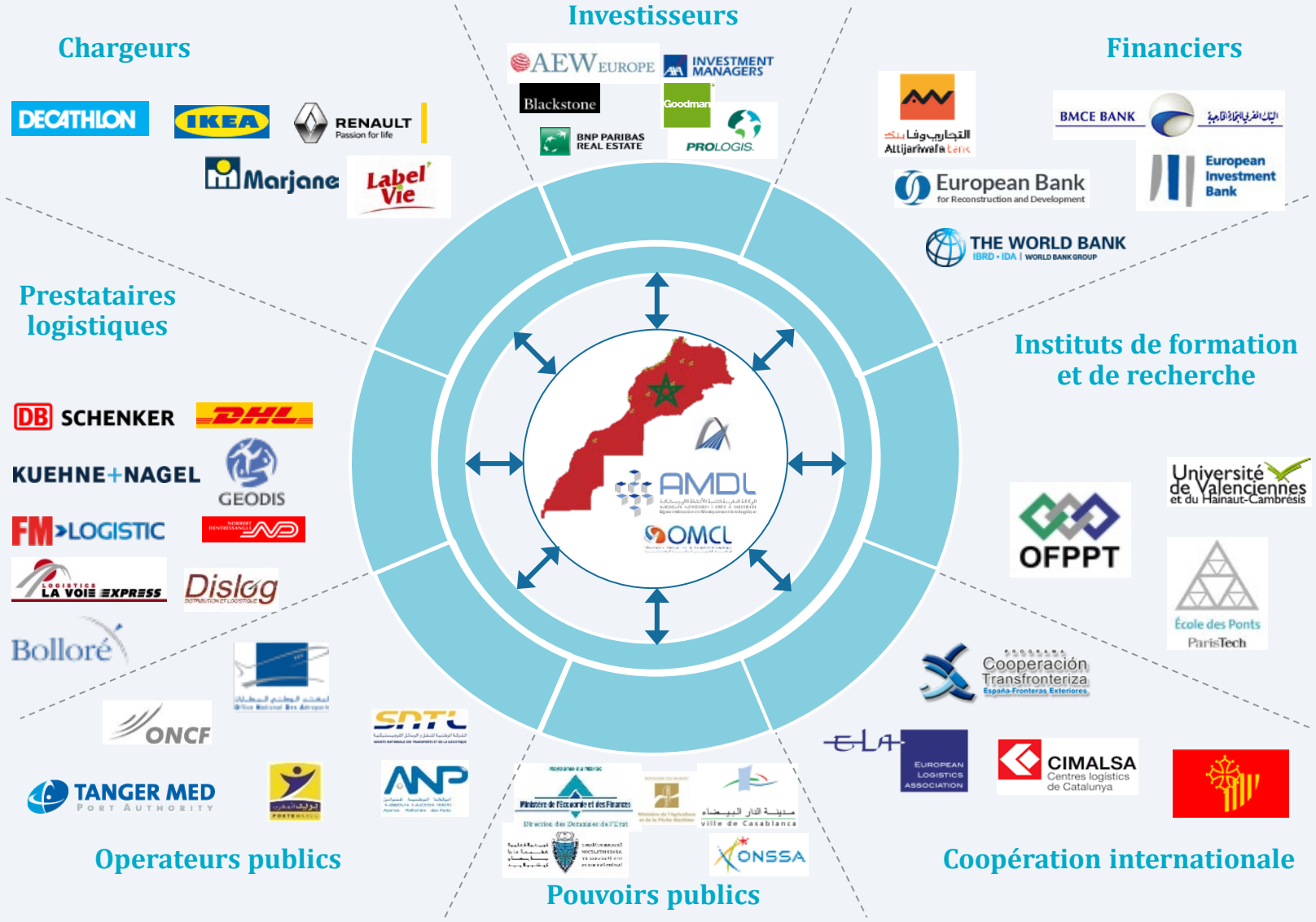
> Comités logistiques au sein des fédérations membres de la Confédération Générale des Entreprises du Maroc (secteur de l'automobile, secteur agroalimentaire, secteur aéronautique, etc.)

> Cluster logistique dans la ville d' Agadir

> Club des logisticiens

Sommaire

Principaux acteurs du développement logistique au Maroc



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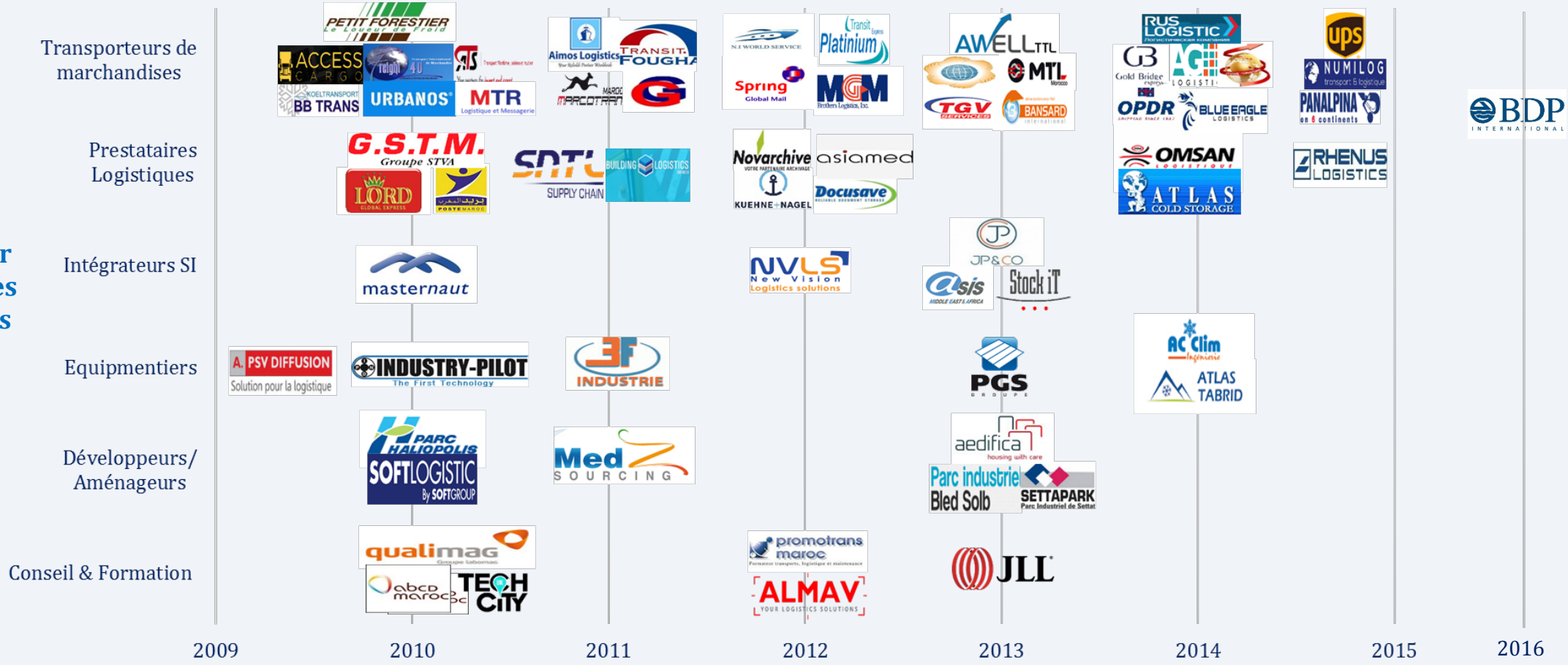
De nouveaux entrants au secteur dans les différents métiers de la logistique

Plusieurs arrivants sur le marché marocain des prestations logistiques



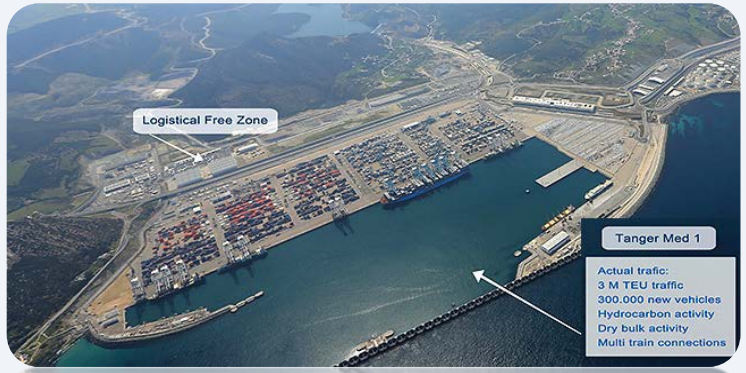
Sommaire

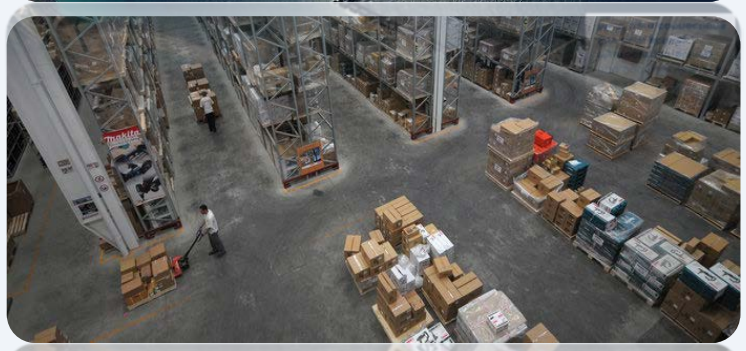
Accélération du rythme de réalisation des premières zones logistiques

- **Premières capacités logistiques mises en place à Casablanca, Tanger et les régions abritant des P2I**
  - > Casablanca : Zenata, Mita et plusieurs projets privés
  - > Tanger-Tétouan : Medhub, TFZ et Tanger Automotive City
  - > Autres régions : parties aménagées au sein des P2I à Kenitra, Oujda, Agadir,…

Zone de Zenata (1ère phase) à Casablanca développée par l'opérateur public la SNTL – 28ha

Zone de Mita (1ère phase) à Casablanca développée par l'opérateur public l'ONCF – 12ha





Zone Medhub à Tanger développée par l'opérateur public TMSA – 30 ha

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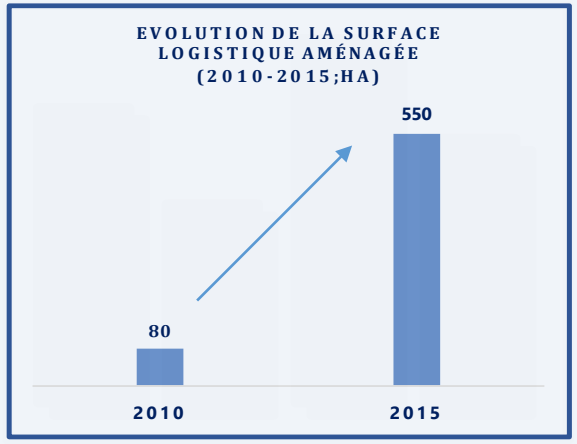
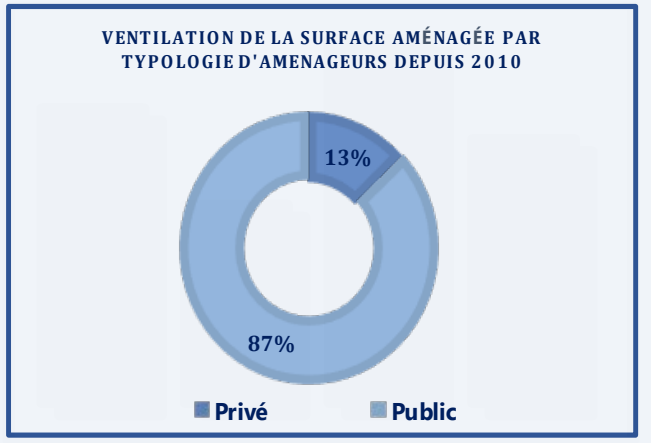
Offre disponible de terrains aménagés pour accueillir des plateformes logistiques modernes



Un développement porté principalement par des aménageurs publics



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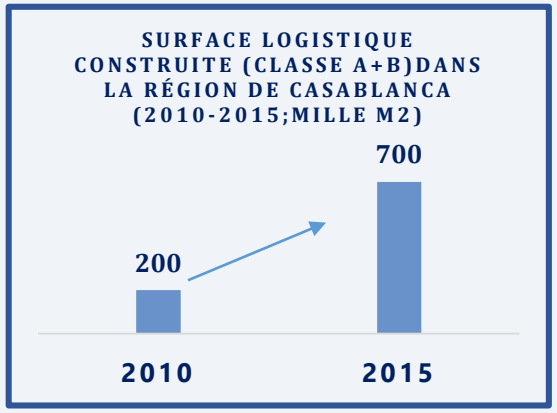
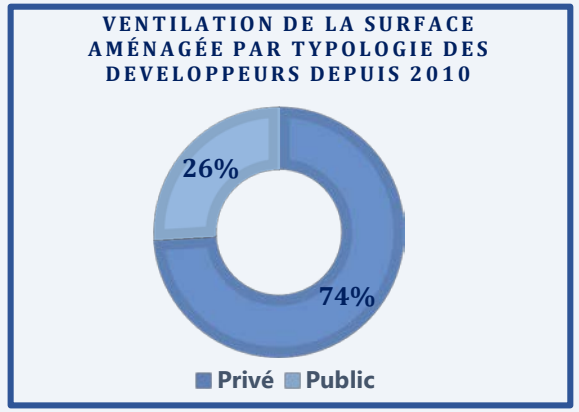
Offre d'immobilier logistique plus étoffée et plus moderne



Triplement de l'offre d'immobilier logistique moderne prêt à l'emploi à Casablanca grâce principalement à des constructions réalisées par le secteur privé



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Développement de zones logistiques pour répondre aux besoins réels du marché

Nombreux projets de zones logistiques prêtes à l'investissement pouvant abriter :

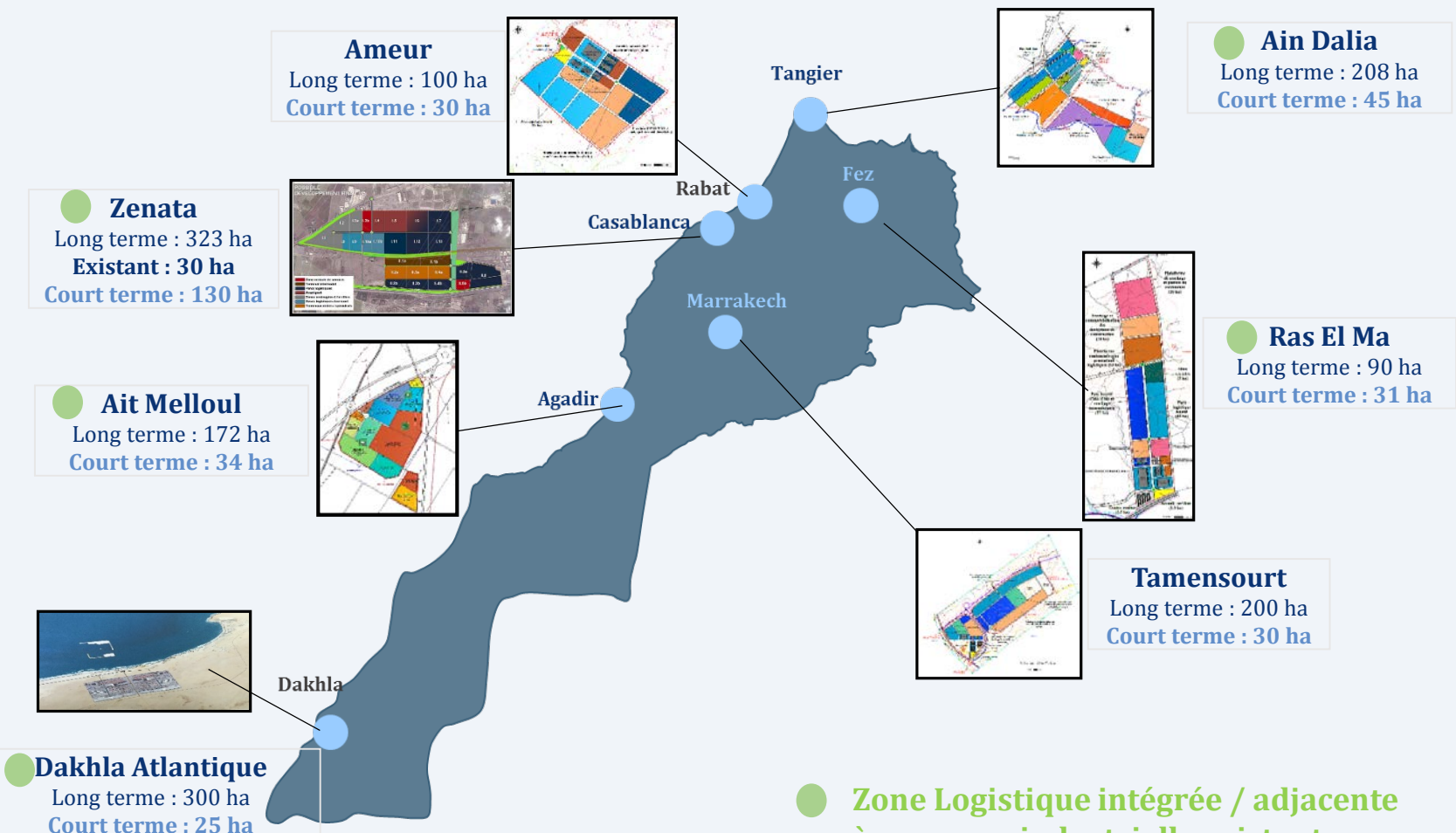
Silos céréaliers

Truck centers

Zones PME-PMI

Entrepôts Classe A

Ports Secs



Ameur
Long terme : 100 ha
Court terme : 30 ha

Ain Dalia
Long terme : 208 ha
Court terme : 45 ha

Zenata
Long terme : 323 ha
Existant : 30 ha
Court terme : 130 ha

Ras El Ma
Long terme : 90 ha
Court terme : 31 ha

Ait Melloul
Long terme : 172 ha
Court terme : 34 ha

Tamensourt
Long terme : 200 ha
Court terme : 30 ha

Dakhla Atlantique
Long terme : 300 ha
Court terme : 25 ha

Zone Logistique intégrée / adjacente à une zone industrielle existante ou prévue à court terme

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Sommaire

Depuis 2010, le secteur logistique au Maroc a nettement évolué et à plusieurs niveaux

Établissement de schémas régionaux identifiant plus de 2700 ha pour les besoins de développement logistique à long terme

Structuration des projets de zones logistiques et identification des premières tranches à lancer

Intégration des infrastructures logistiques dans les documents de l'aménagement du territoire

Activité et investissement en nette évolution (Une croissance de 29% sur la période 2010-2014)

Offre de services/prestations plus étoffée et plus diversifiée (diminution par 37% le coût d'entreposage sur la période de 2010-2015 passage de 3 dh/palette/jour à 1,9 dh/palette/jour)

Offre de formation nettement plus développée (Triplement de l'offre sur la période 2010-2015)

Offre en immobilier logistique plus étoffée, plus moderne à un prix plus compétitif (diminution de 36% du prix de location des entrepôts sur la période de 2010-2015. Passage de 62 dh/m^2 mois à 40 dh/m^2/mois)

Coûts logistiques en baisse (exemple : diminution par 47% le coût de la traversée Tanger Med – Algeciras sur la période 2010-2015- Passage de 650 euros à 350 euros)

Leadership régional et rayonnement à l'international

CETMO

AMDL
الوكالة المغربية لتنمية الأنشطة اللوجيستيكية
Moroccan Agency for Logistics Development

Plusieurs acquis consolidés, mais des défis persistent…

Taux d'externalisation encore faible, surtout chez les PME

Indisponibilité de certains types d'immobilier logistique (petites cellules)

Rareté et prix élevé des terrains aménagés dans certaines régions

Qualité des formations et adéquation offre-demande

Massification insuffisante

Usage limité des bonnes pratiques logistiques

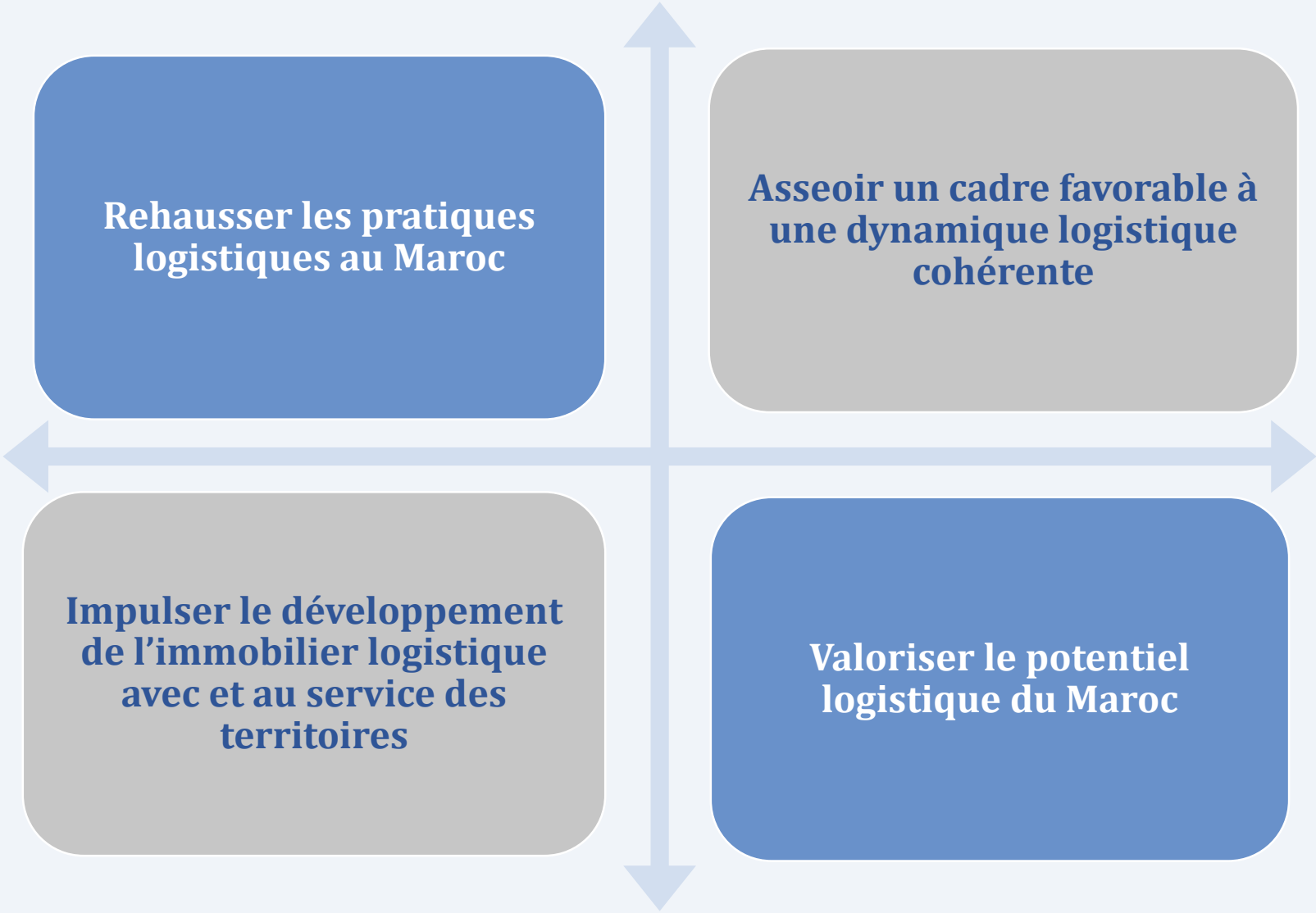
Inefficacité de la logistique en ville

Informel

CETMO

AMDL
الوكالة المغربية لتنمية الأنشطة اللوجيستيكية
Moroccan Agency for Logistics Development

Perspectives du développement logistique
Guidelines de l'action future



CETMO

AMDL
الوكالة المغربية لتنمية الأنشطة اللوجيستيكية
Moroccan Agency for Logistics Development

SCZone

وزارة النقل
MINISTRY OF TRANSPORT

ARAB REPUBLIC OF EGYPT

WORKSHOP ON THE LOGISMED LOGISTICS PLATFORMS AND A NETWORK OF LOGISTICS PLATFORMS

19th September 2016
Barcelona

AGENDA ITEMS

1. Main actors involved in logistics development.
2. Main logistics platforms projects.
3. Lessons learned.
4. SCZone

SCZone

وزارة النقل
MINISTRY OF TRANSPORT

AGENDA ITEMS

1. Main actors involved in logistics development.
2. Main logistics platforms projects.
3. Lessons learned.

SCZone

Logistics

2. Ministry of Finance
Customs Authority

1. Ministry of Transport
General Authority for Land & Dry Ports
General Authority for Roads & Bridges
Maritime Sector

3. Ministry of Housing and Urban Development
General Organization for Physical Planning (GOPP)

6. Ministry of Local Development
Ministry of Investment
Governorates

4. Ministry of Trade and Industry
General Authority for Industrial Development

5. Ministry of Investment
General Authority for Free Zones and Industry (GAFI)

SCZone

Logistics

1. Ministry of Transport

- Plan locations of logistic centers, land, dry ports
- Provide access (railway, inland waterways, roads, etc.)
- Develop facilities for ports managed by the Ports Authority (cranes, stackers, etc.)

2. Ministry of Finance

Customs Authority

3. Ministry of Housing and Urban Development

General Organization for Physical Planning (GOPP)

4. Ministry of Trade and Industry

General Authority for Industrial Development

5. Ministry of Investment

General Authority for Free Zones and Industry (GAFI)

6. Ministry of Local Development
Ministry of Investment

Governorates

Logistics

1. Ministry of Transport

General Authority for Land & Dry Ports
General Authority for Roads & Bridges
Maritime Sector

2. Ministry of Finance

- Levy taxes, tariffs, and fees on imported goods as decreed by law
- Ensure all necessary inspections (health, phytosanitary, etc.) are done before clearing imported goods

3. Ministry of Housing and Urban Development

General Organization for Physical Planning (GOPP)

4. Ministry of Trade and Industry

General Authority for Industrial Development

5. Ministry of Investment

General Authority for Free Zones and Industry (GAFI)

6. Ministry of Local Development
Ministry of Investment

Governorates

Logistics

2. Ministry of Finance
Customs Authority

1. Ministry of Transport
General Authority for Land & Dry Ports
General Authority for Roads & Bridges
Maritime Sector

3. Ministry of Housing and Urban Development

- Assign plots of land for the development as logistics Centers

6. Ministry of Local Development
Ministry of Investment
Governorates

4. Ministry of Trade and Industry
General Authority for Industrial Development

5. Ministry of Investment
General Authority for Free Zones and Industry (GAFI)

SCZone

2. Ministry of Finance

Customs Authority

1. Ministry of Transport

General Authority for Land & Dry Ports
General Authority for Roads & Bridges
Maritime Sector

Logistics

3. Ministry of Housing and Urban Development

General Organization for Physical Planning (GOPP)

6. Ministry of Local Development
Ministry of Investment

Governorates

4. Ministry of Trade and Industry

- Assign plots of land for the development as logistics Centers (Apparent duplication with No. 3)

5. Ministry of Investment

General Authority for Free Zones and Industry (GAFI)

SCZone

Logistics

2. Ministry of Finance
Customs Authority

1. Ministry of Transport
General Authority for Land & Dry Ports
General Authority for Roads & Bridges
Maritime Sector

3. Ministry of Housing and Urban Development
General Organization for Physical Planning (GOPP)

6. Ministry of Local Development
Ministry of Investment
Governorates

4. Ministry of Trade and Industry
General Authority for Industrial Development

5. Ministry of Investment
Representatives from 47 ministries and government agencies to provide all licenses and approvals to establish businesses

Logistics

1. Ministry of Transport

General Authority for Land & Dry Ports
General Authority for Roads & Bridges
Maritime Sector

2. Ministry of Finance

Customs Authority

3. Ministry of Housing and Urban Development

General Organization for Physical Planning (GOPP)

4. Ministry of Trade and Industry

General Authority for Industrial Development

5. Ministry of Investment

General Authority for Free Zones and Industry (GAFI)

6. Ministry of Local Development
Ministry of Investment

- Provide utilities (e.g. power, water, sewage, telecommunications, etc.) and other needed municipal services (e.g., garbage collection)

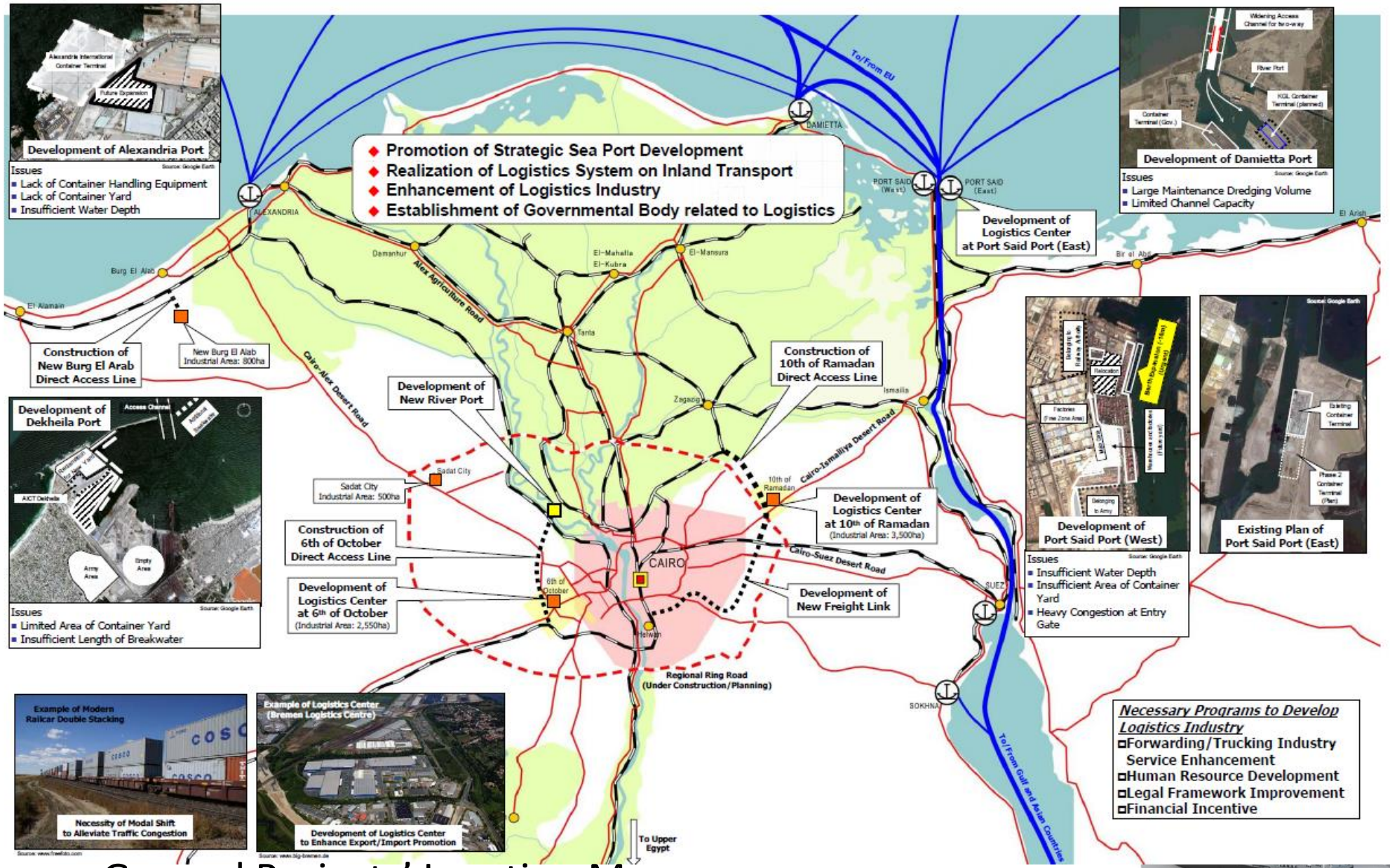
SCZone

AGENDA ITEMS

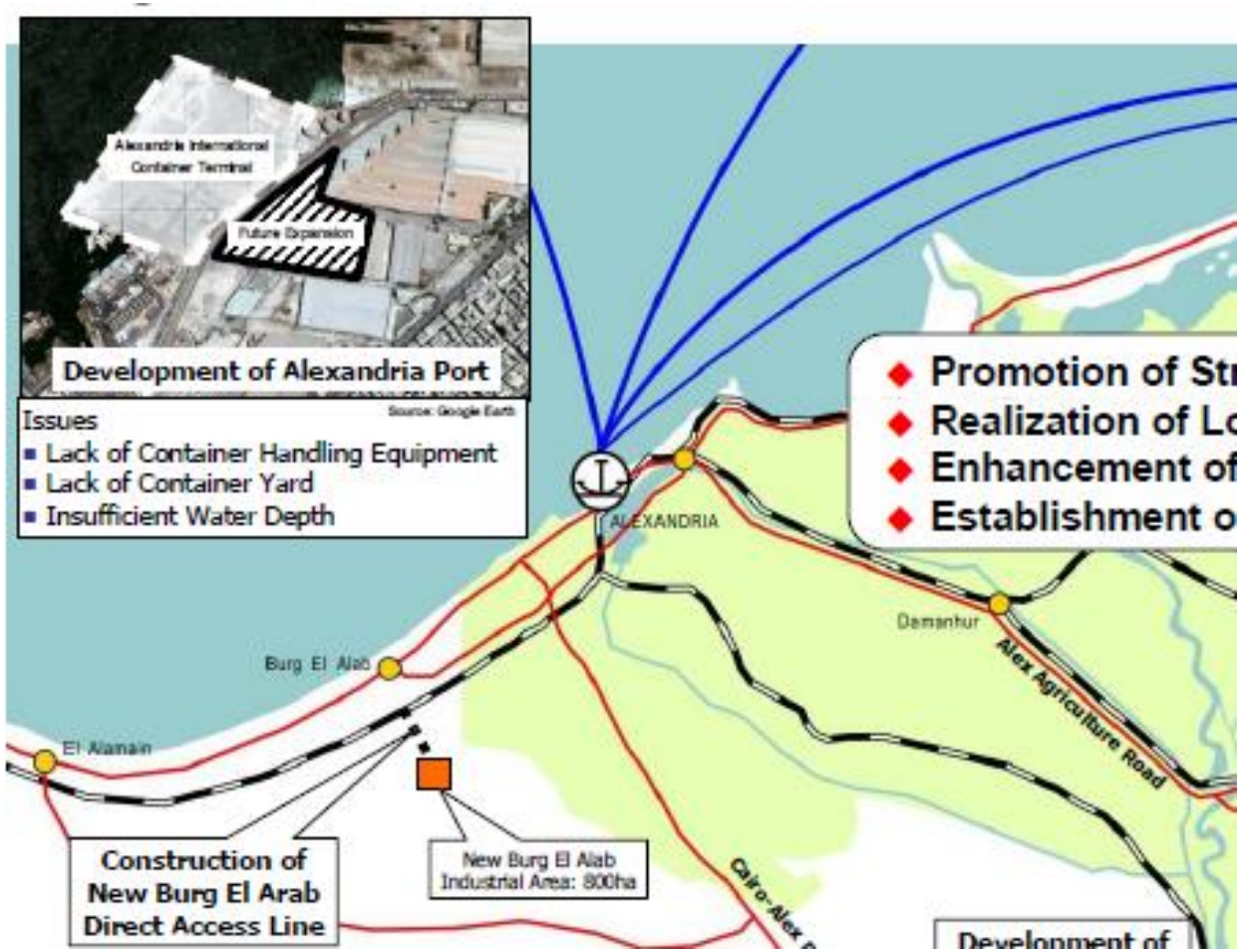
1. Main actors involved in logistics development.
2. Main logistics platforms projects.
3. Lessons learned.

SCZ

وزارة النقل
MINISTRY OF TRANSPORT



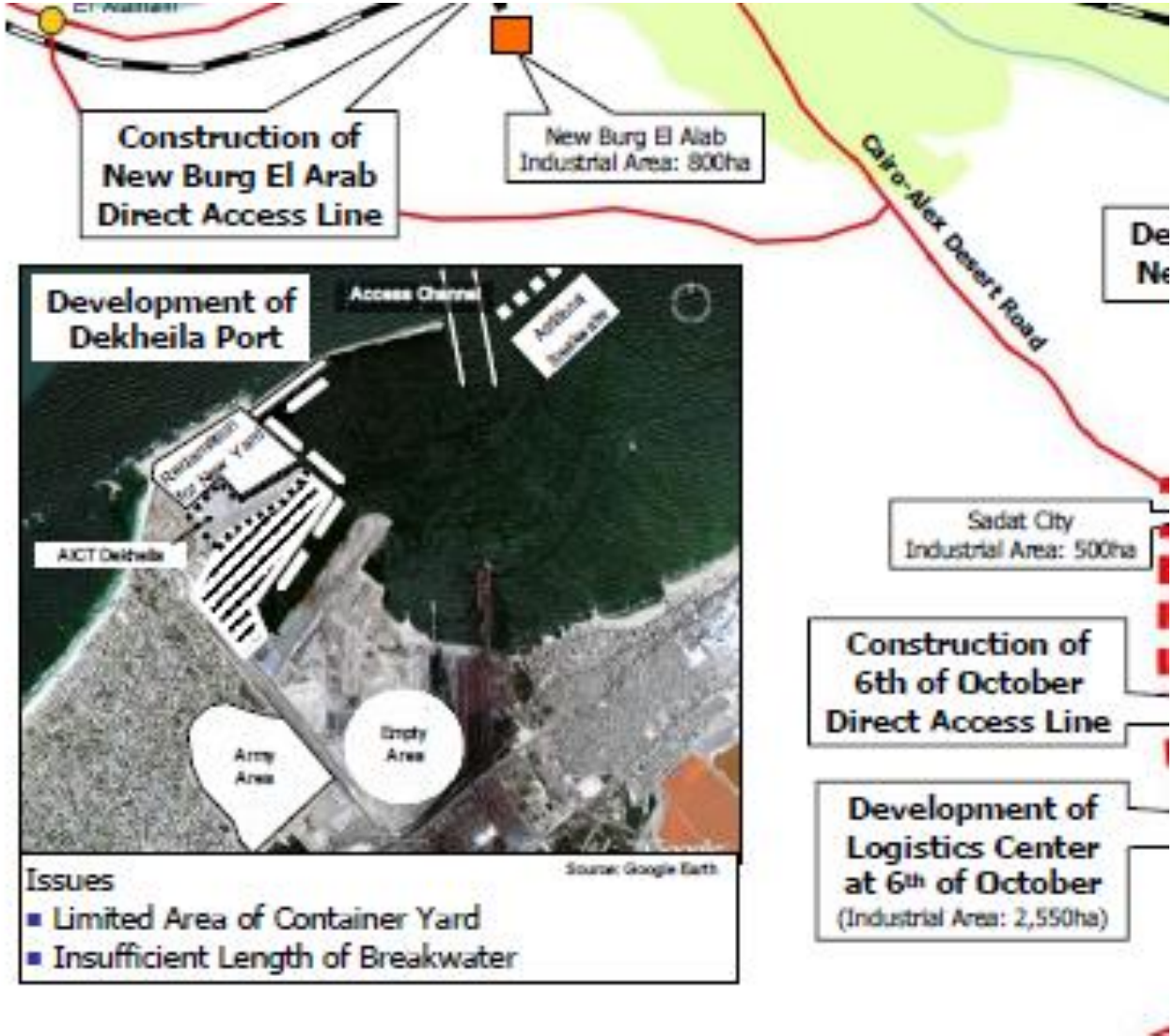
General Projects' Location Map



1. Development of Alexandria Port

- Multipurpose Terminal Development
- Container Yard Expansion
- Middle Port Development Project (between Alex. & Dekheila Ports)

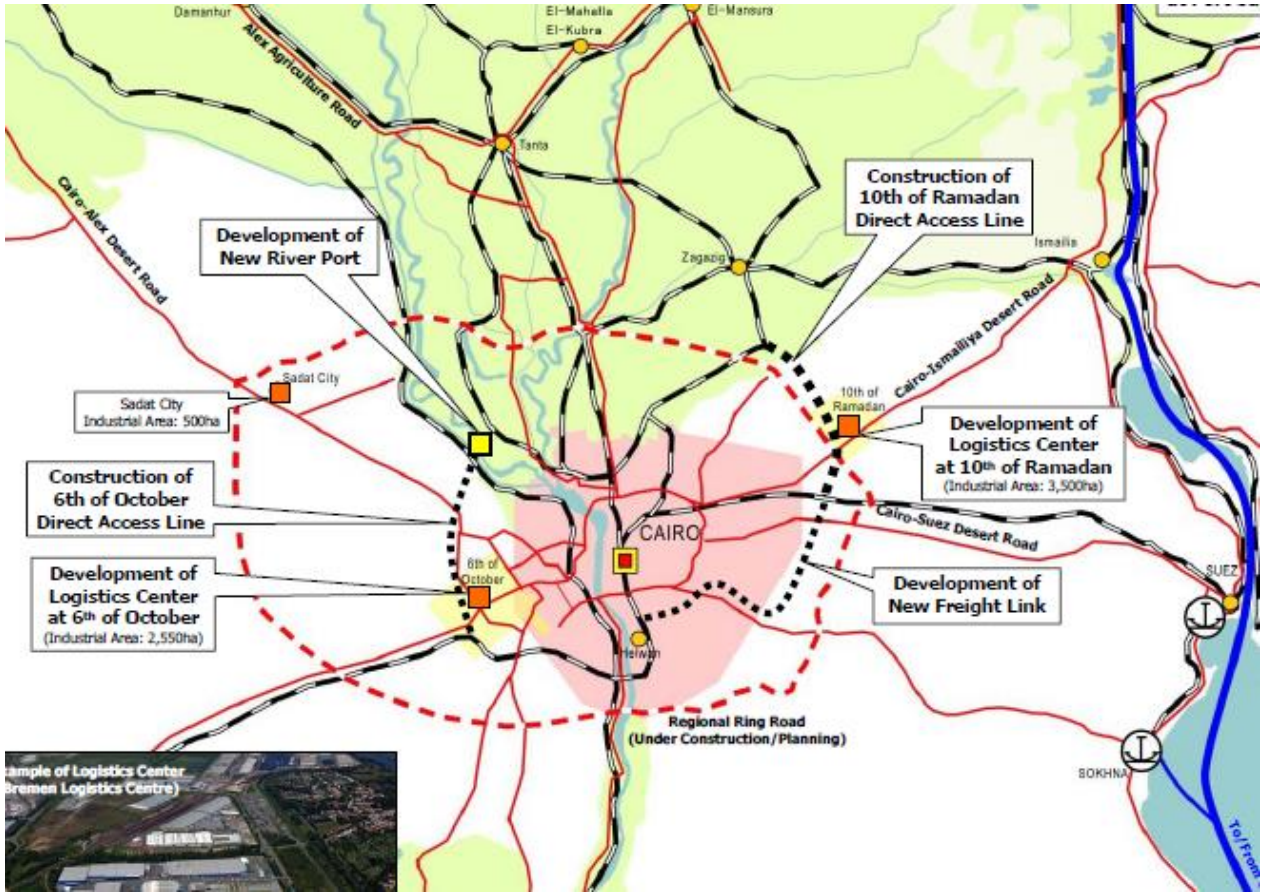
SCZone



2. Development of Dekheila Port

- Container Terminal Development
- Petrochemical Berth Construction
- Grain Berth Extension
- Billet, Coal & Coke and Dry Bulk Berth Development

SCZone



3. Development of Logestics Center at the City of the 6th of October.

4. Development of Logestics Center at the City of the 10th of Ramadan.

SCZone

وزارة النقل
MINISTRY OF TRANSPORT

AGENDA ITEMS

1. Main actors involved in logistics development.
2. Main logistics platforms projects.
3. Lessons learned.

Some of the bottlenecks include:

- Governance:
  - Fragmentation: No single entity in charge of the sector.

- Infrastructure (Ports):
  - Ports Masterplan: Define the role of each port
  - Reduce Handling Delays: Upgrade infrastructure and facilities.

Some of the bottlenecks include:

- Infrastructure (Roads):
  - Reduce Trip Delays: Upgrade trucking industry. Shift to other modes (railways, Inland waterways). Control overloading
- Infrastructure (Railways):
  - Reduce Trip Delays: Upgrade handling equipment at stations.
  - Better access: Develop any links missing to/from logistics zones

Some of the bottlenecks include:

- Infrastructure (Inland Waterways):
  - Reduce Trip Delays: Upgrade handling equipment at ports. Improve lock operations. Allow for night navigation (use of GPS, tracking, navigation aid, etc.)
- Infrastructure (Warehouses):
  - Streamline approvals of the activity by local authorities, also the connection of utilities.

Some of the bottlenecks include:

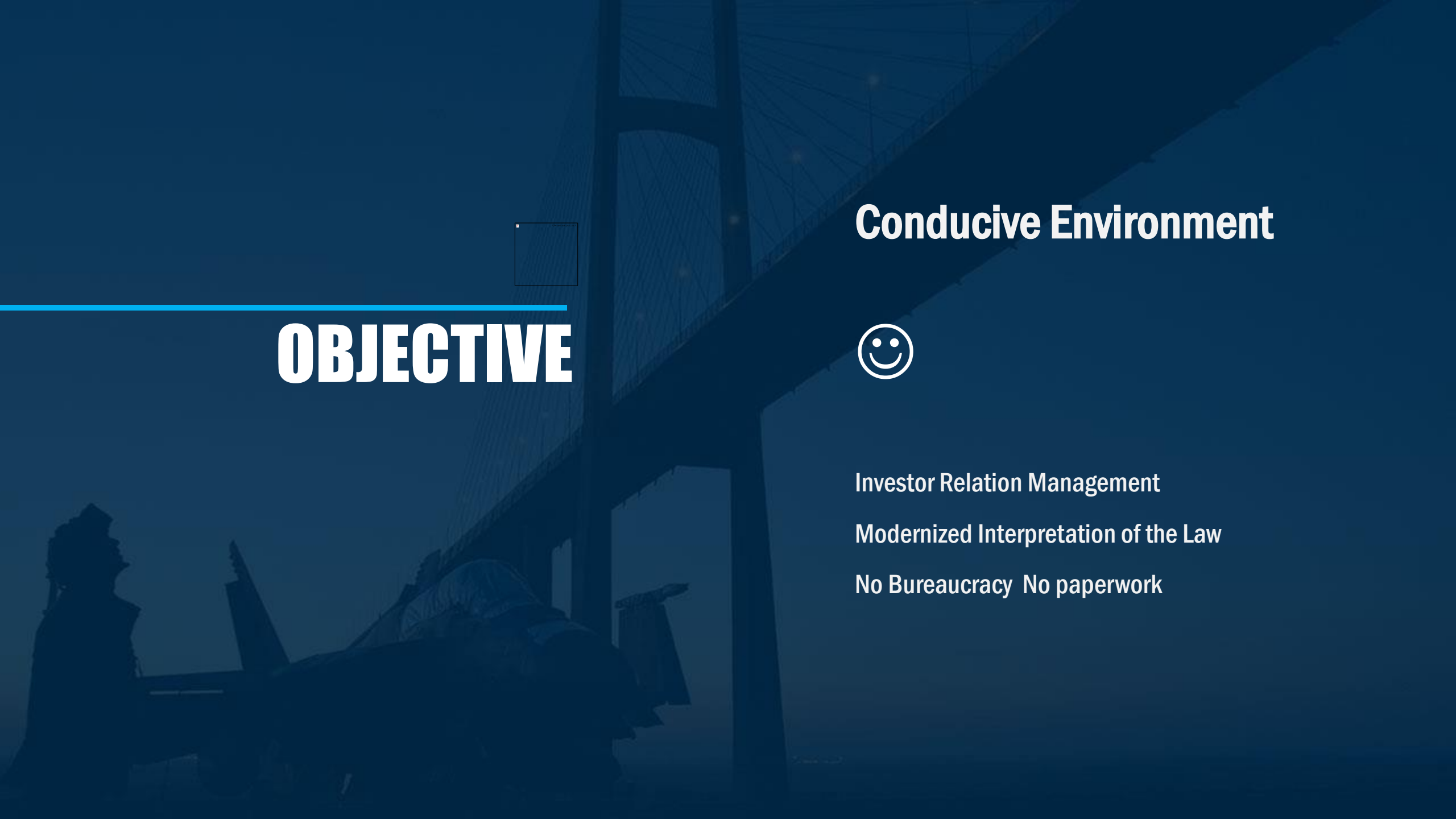
- Clearance of Goods:
  - Improve clearing process and reduce time through the use of “Single Window”
  - Better and wider use of technology
- Manpower:
  - Develop capacities through approved training and certification processes (LOGISMED – Soft)

SCZone

Suez Canal Economic Zone

OBJECTIVE

Conducive Environment



Investor Relation Management

Modernized Interpretation of the Law

No Bureaucracy No paperwork

SCZone

Governance
Setup
Target
Relation to state
Strategy and business plan

SCZone

Activities

Regulatory

Registration & Licensing

Infrastructure

Investment

Dispute resolution

Tax Collection

Ports

CURRENT PHASE

- **461 Sq km**
- **6 ports**

Hamburg

Rotterdam

Suez Canal

Shanghai

Hong Kong

Jabal Ali

Shenzhen

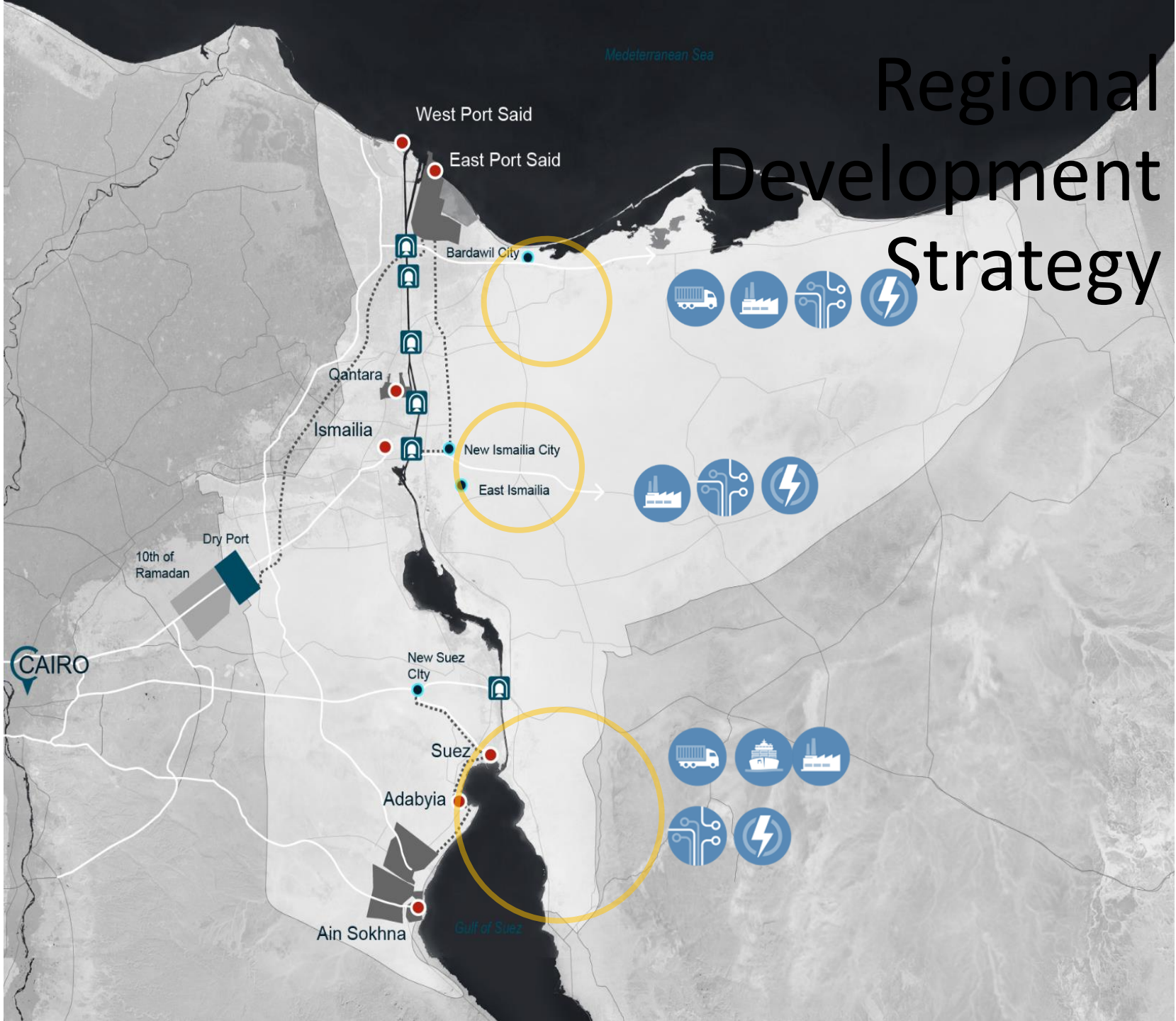
Panama

Singapore

SCZone

Opportunities across all sectors

- Port & Logistics
- Maritime-related Services
- Manufacturing
- ICT
- Energy



Regional Development Strategy

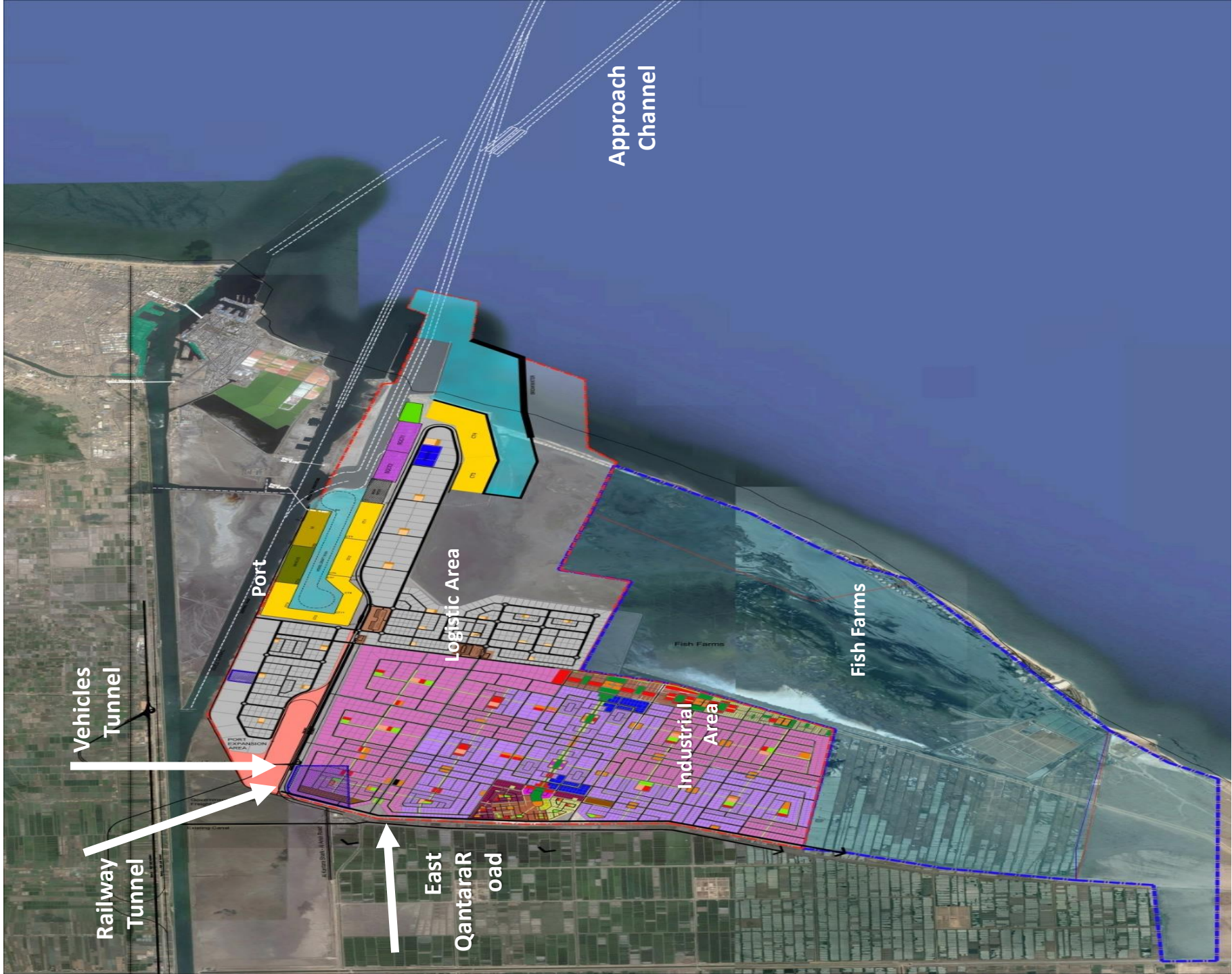
SCZone

Mediterranean
Eastern Africa
SA & Gulf
Eastern Europe

SCZone

East Port Said

6.5 km 4 Terminals
24 km² Logistics
44 km² Industry
6 km² Housing



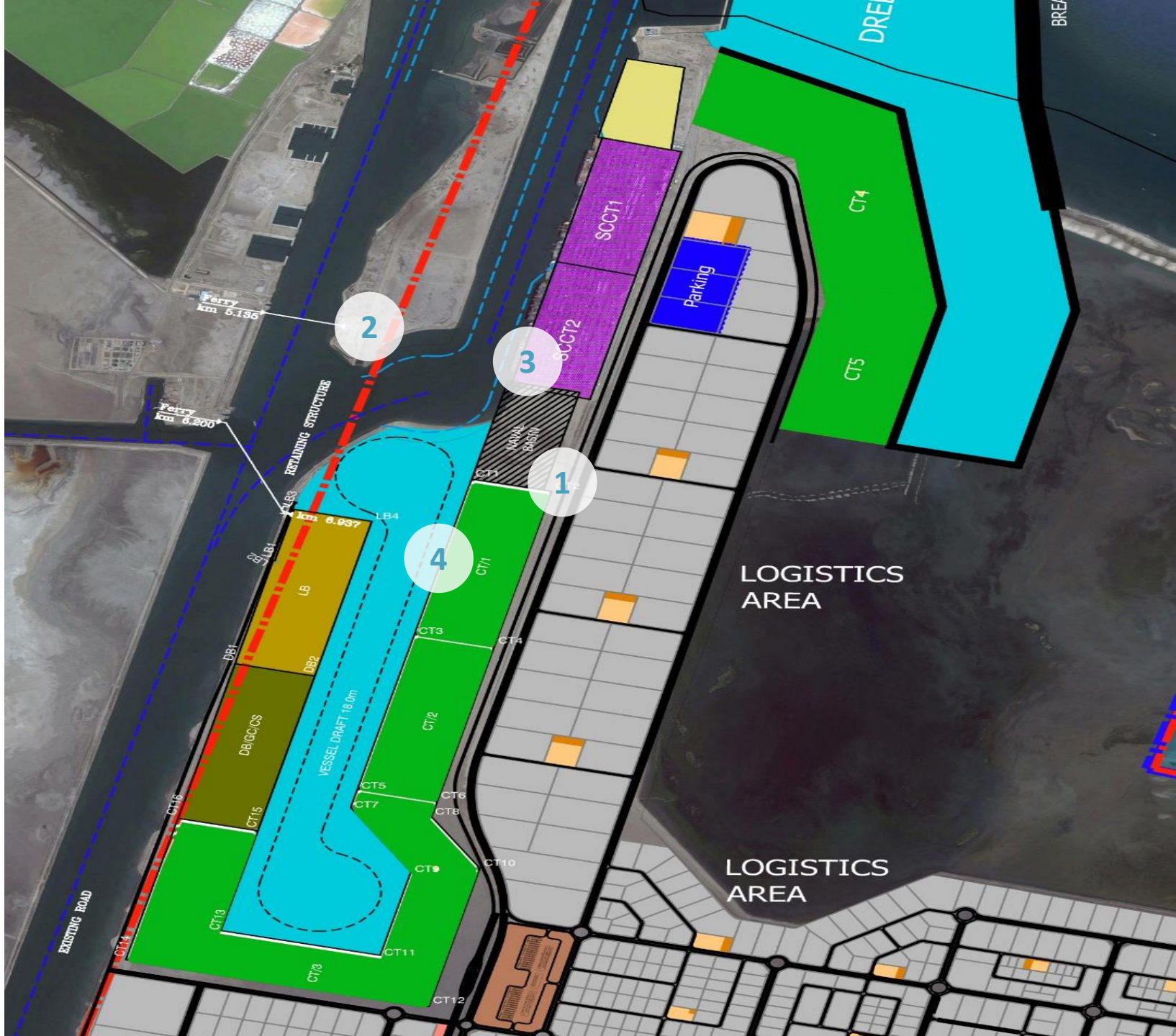
SCZone

East Port Said – Development

Current north terminal (1500m) operated by APM for Mearsek

3 more terminals under construction (4956 m)

Fully integrated port with the logistic and industrial zone

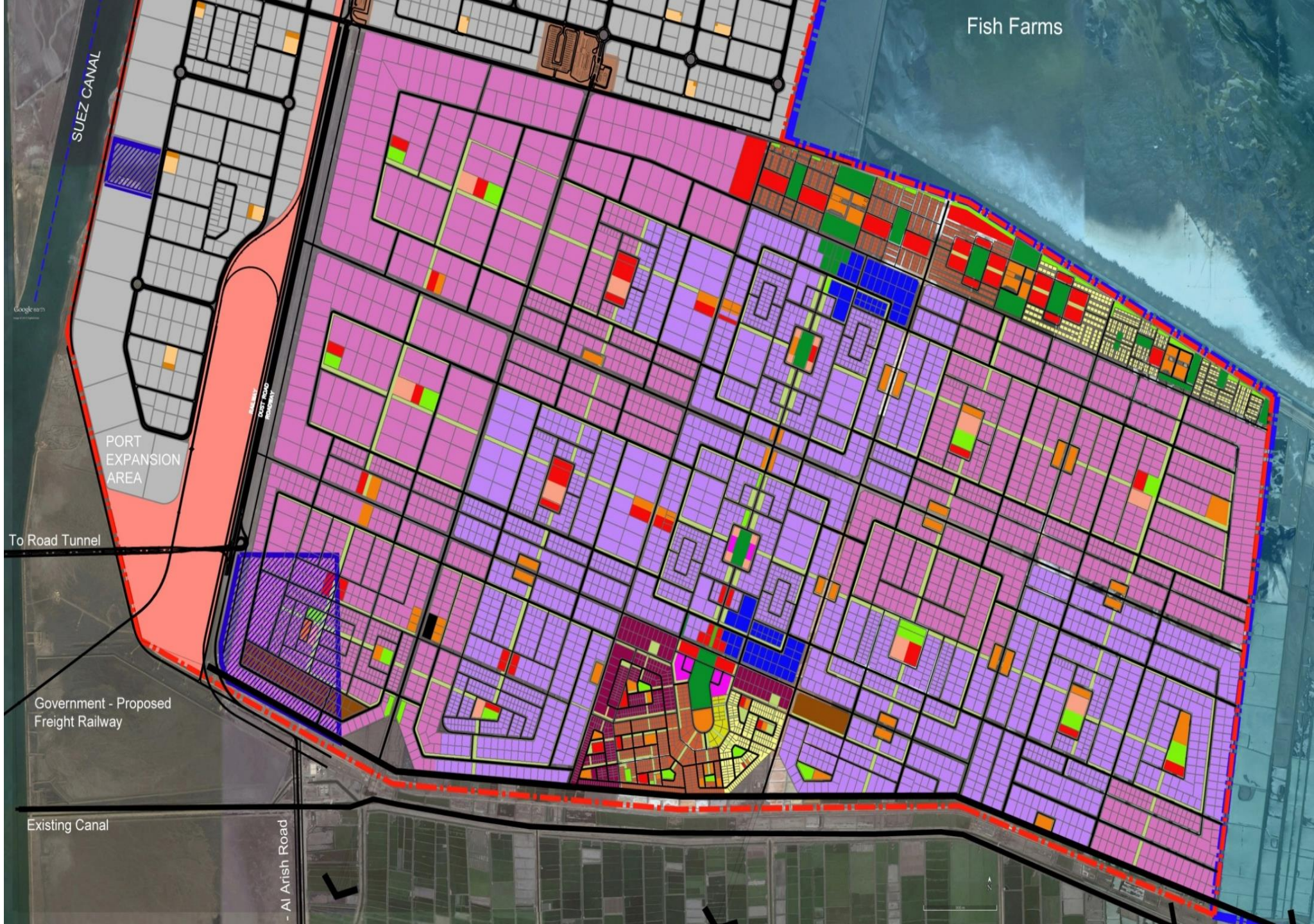


SCZone

Legend:

- Shops
- High density housing
- Medium density housing
- Social services
- Light Industries
- Medium Industries
- High Industries
- Commercial offices

Industrial Area Land Use

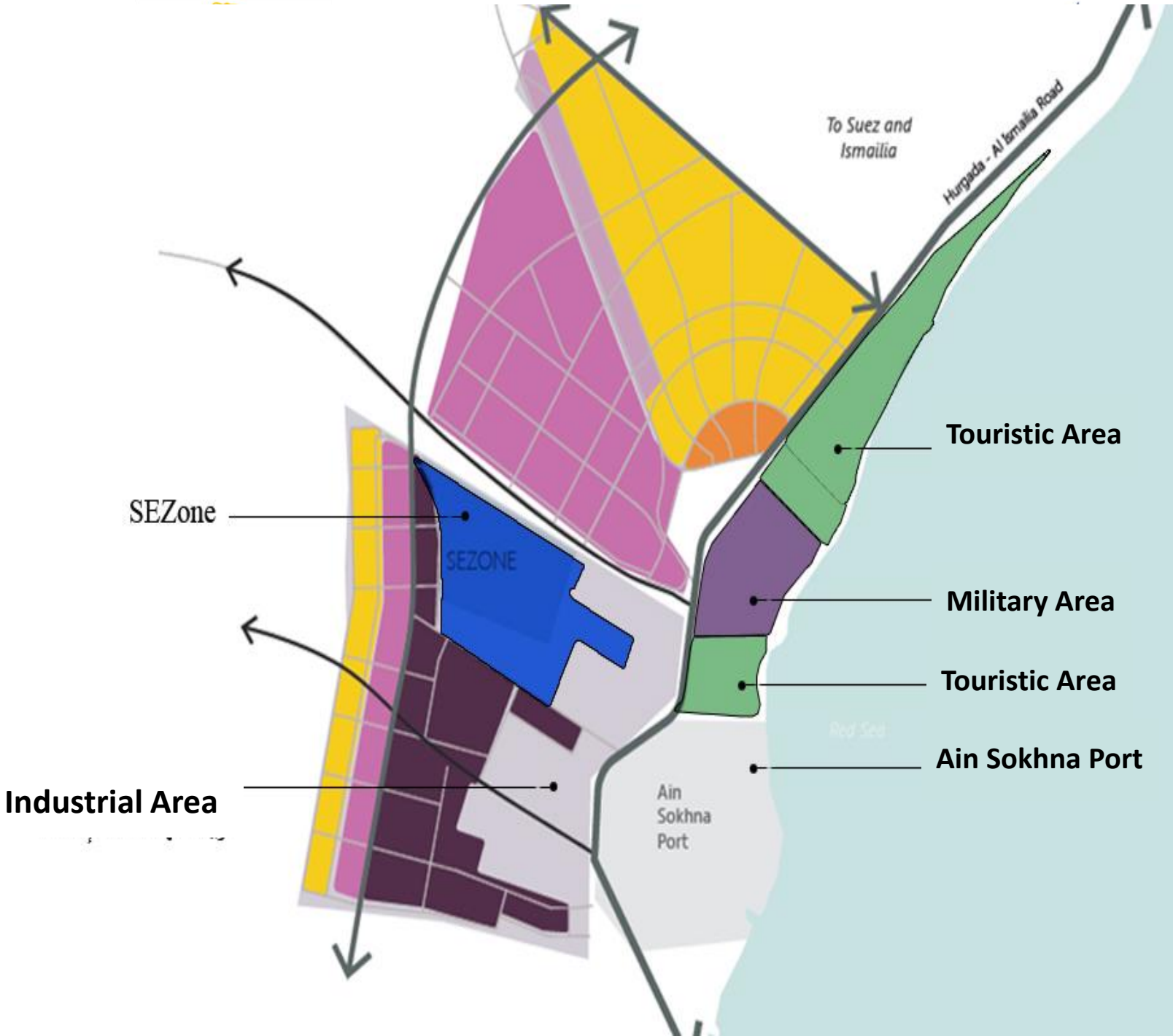


SCZone

Legend:

- Heavy Industries
- Light Industries
- Medium Industries
- Mixed Uses and Residential
- Central Area
- Touristic Area

Ain Sokhna Land Use



SCZone

Competitiveness

Location

Connectivity :

Roads -Rail –Ports -Airports

Ease of doing business

- Land / Office Building
- Registration
- Lic

- Time from port to factory and vice versa
- Labour Laws
- Price and skill of labour

Basic Infrastructure

- Elect /Gas /Water /Water Treatment / Roads / Communications

  Goes without saying !

- IT as a service

Incentives

- Corporate Taxes
- Value Added Tax
- Wages Tax
- Tax on Foreigners
- Customs

- Insurance
- Contribution to Pensions
- Training
- Contribution to Establishment

SCZone

وزارة النقل
MINISTRY OF TRANSPORT

THANK YOU

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darwish@sczone.eg
www.sczone.eg

ATELIER SUR LES PLATEFORMES LOGISTIQUES LOGISMED ET LE RÉSEAU DE PLATEFORMES LOGISTIQUES

Barcelone le 19 Septembre 2016

Projet Régional Logismed Soft

REPUBLIQUE ALGERIENNE DEMOCRATIQUE ET POPUULAIRE

Ministère des Travaux Publics et des Transports

Logistique en Algérie

Mr. Abderrahim Lotfi BENYELLES
Point Focal Algérie
Logismed Soft

Rappel de principes fondamentaux des PFL dans Schéma National d'Aménagement du Territoire:

- Définir les critères et paramètres pour une localisation pertinente des PFL, en arrière des ports, a la convergence du rail, des autoroutes et aéroports.

- Eviter les ruptures de charges dans la chaine des transports

- De programmer des chaines logistiques de distribution des produits avec la création d'activités et de services annexes dans le transport, le conditionnement, et le stockage.

Situation en Algérie (I)

- **Le coût de logistique représente environ: 10 % du PIB des pays développés. Par ailleurs il est estimé a 20% du PIB pour les pays du Maghreb et atteint un taux de 25% pour l'Algérie.**

- **Bien que le pays a fait des avancées dans la logistique (mesurées par l'Indice de performances logistiques). Entre 2007 et 2016, l'Algérie a progressé de 65 places, passant ainsi du 140ième rang au 75ième sur un total de 160 pays. Ce cout reste assez élevé.**

Situation en Algérie (II)

- Concernant les infrastructures de transport, l'Algérie est classée 106ième à l'échelle mondiale, avec une 107ième place pour la qualité de ses routes, une 117ième place pour ses ports et une 128ième place pour ses infrastructures de transport aérien.

- L'amélioration de la qualité des infrastructures de transports ont contribué significativement à cette avancée en passant de la 139ème place /153 en 2007 à la 80ème place /163 en 2016.

Principaux Acteurs Engagés dans le Développement de la Logistique en Algérie (I)

Types d'acteurs :

- **Entités publiques:**
  - Initiateur du projet,
  - Détenteur de l'assiette,
  - Pouvoirs régaliens,
- **Promoteurs et Gestionnaires**
  - Opérateurs Publics (Ports, Aéroports, SNTR, SNTF)
- **Utilisateurs:**
  - Clients de la plate-forme,
  - Destinataires directs des services collectifs,

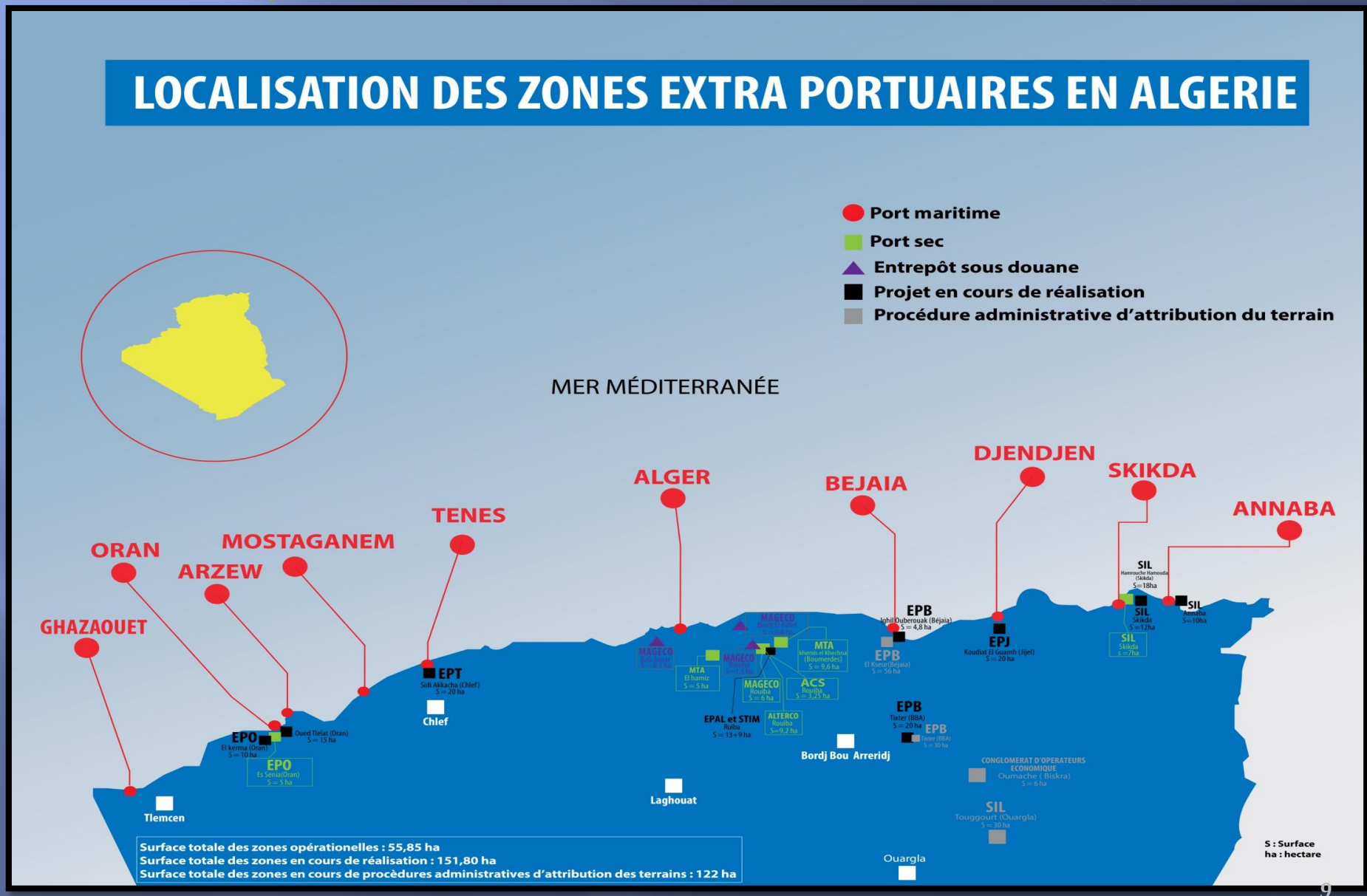
Principaux Acteurs Engagés dans le Développement de la Logistique en Algérie (II)

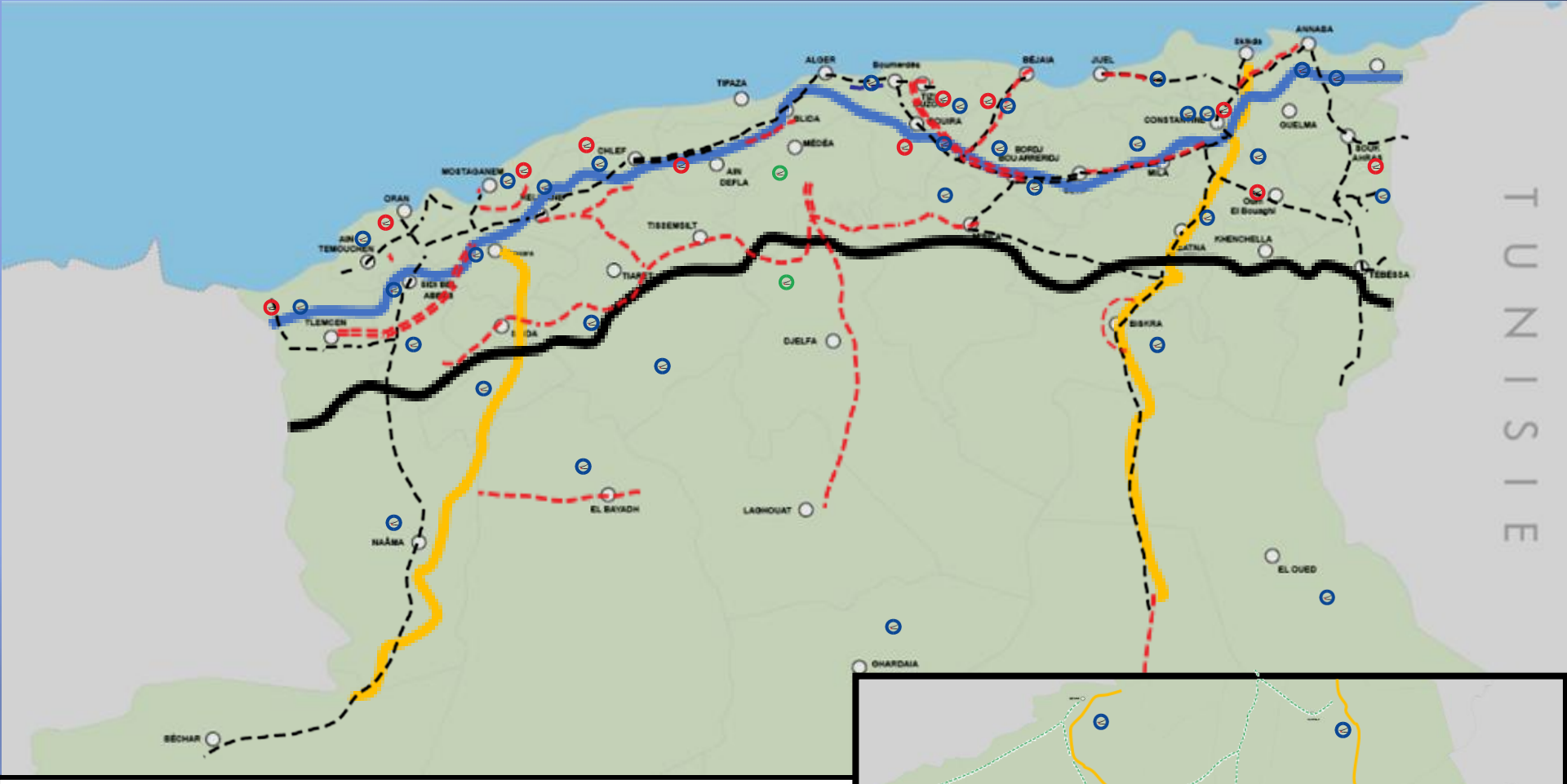
- Le Ministère des travaux publics et des transports
- Le Conseil national des transports terrestres
- Les Directions de transport de la Wilaya
- Le Ministère de l'industrie et de la promotion de l'investissement
- Le Conseil des participations de l'Etat
- Le Conseil national de l'investissement
- L'Autorité portuaire
- Le Groupe SERPORTS (SOGEPORTS)
- Les établissements de gestion des services aéroportuaires(E.G.S.A)
- Le Ministère de l'intérieur et des collectivités locales
- Le Ministère des Finances
- La Direction Générale des douanes

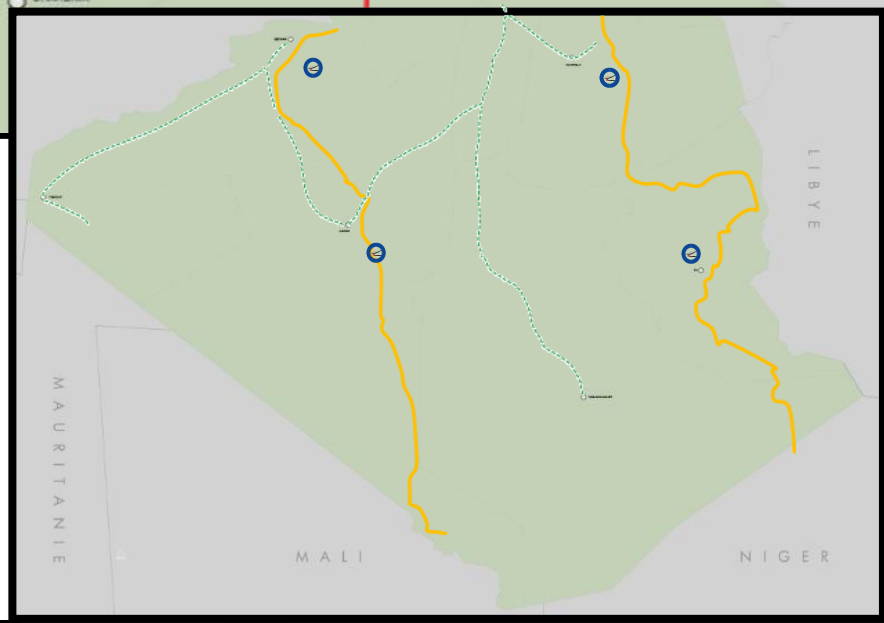
Principaux Projets de plateformes logistiques opérationnelles, en cours de réalisation (I)

Première phase	Alger 1 Rouiba	Oran	Skikda
Portuaire Aéroportuaire	Port sec Messagerie express	Port sec	Port sec
Internationale	Distribution Concessionnaires Consommables	Distribution Concessionnaires Consommables	Distribution Consommables
Régionale	Oui	Oui	
Industrielle	oui		
Produits périssables		Export Pêche Import/export primeurs	
Deuxième phase	**Alger 2-Blida**	**Sétif ou BBA/M'Sila**	**Biskra**
Portuaire Aéroportuaire			Port sec
Internationale	Distribution Consommables	Distribution Consommables	Oui
Régionale		Oui	Oui
Industrielle			
Produits périssables	Primeurs		Dattes, primeurs

Principaux Projets de plateformes logistiques opérationnelles, en cours de réalisation (II)







Légende

- *Autoroute Est-Ouest*
- *Autoroute Pénétrante Nord-Sud*
- *Autoroute Rocade des Hauts Plateaux*
- *Lignes Ferroviaires Existantes*
- *Lignes Ferroviaires En Projet*
- *Lignes Ferroviaires à Lancer en Travaux*
- *Lignes Ferroviaires En Etude*
- *Parcs Industrielles En Travaux*
- *Parcs Industrielles En Etudes*
- *Parcs Industrielles à Lancer*

Principaux Projets de plateformes logistiques opérationnelles, en cours de réalisation (III)

- ACS
- SIL
- AILC
- AGS
- SNTR Logistique
- IOB
- TIXTER
- ORAN (SENIA)

Société Intermodale de Logistique SIL
Sites d'Exploitation (I)

La SIL est le 1er opérateur de PPP portuaire et ferroviaire Dans le cadre des ses activités, la SIL exploite quatre sites localisés comme suit :

- **Site du port sec d'une superficie de 7 ha situé à la petite zone industrielle de Skikda.**
- **Site d'une superficie de 12 ha jouxtant le site du port sec de 7 ha à Skikda.**
- **Site d'une superficie de 18 ha situé à Hamrouche Hamoudi (Skikda).**
- **Site d'une superficie de 10 ha situé dans la gare des marchandises d'Annaba**

Société Intermodale de Logistique SIL
Sites d'Exploitation (II)

ASSOCIES :

- Entreprise Portuaire de Skikda (SER Ports)
- Entreprise Portuaire d'Annaba (SER Ports)
- Société Intermodale de transport de Marchandises STIM (SNTF)
- Sociétés placées sous la tutelle du Ministère des Transports.

SIEGE SOCIAL : Zone industrielle Skikda.

SITES D'EXPLOICATION :

- Sites extra portuaires de Skikda : 37 ha
- Site Allelik-Annaba : 7 ha extensible à 20 ha, soit à moyen terme: 57 ha au total, avec création future d'autres plates formes logistiques à l'intérieur du pays (constituant un couloir logistique s'étalant des ports de Skikda et d'Annaba, jusqu'à Hassi Messaoud), qui seront exploitées par cette même société.

Algérienne Intermodale Logistique du Centre AILC/EPE SPA

SIEGE SOCIAL :

HAOUCHE EL BEY ROUIBA – ALGER.

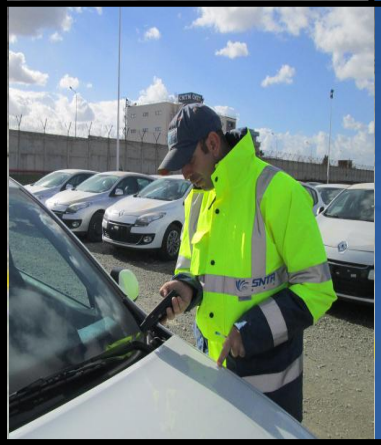
SITES D'EXPLOITATION

- Site EPAL 9,6 ha
- Site STIM 9 ha

INCIDENCES SUR L'ACTIVITE PORTUAIRE :

- Désengorgement du Port d'Alger
- Réactivation du transport par Rail et combiné Rail-route
- Services plus rendus à la carte aux usagers des ports

ALGERIAN GLOBAL SERVICES



Opérateur National spécialisé dans l'exploitation des Zones logistiques extra-portuaires (Ports secs , Entrepôts sous douanes, Locaux de stockage , Aires d'entreposage)
ainsi que la gestion des flux de bout en bout

A G S

Dénomination	***SNTR AGS***
Effectif	*142 agents*
Siège Social	*Zone Industrielle de Rouiba -ALger*
Date de création	*2013*
Capital	*1 million de dinars*
Moyens	▪ *Port Sec ROUIBA 63.000 m²* *Conteneurs Standard (2500-3000 EVP), Conteneurs frigos (150-200 EVP), matières dangereuses (250-300 EVP), dépotage et empotage (2 000 m²)* ▪ *Entrepôt sous Douane Mostaganem 12 000 m²* ▪ *Entrepôts libres* *MOHAMMADIA, OUED SMAR, ORAN EL KARMA, TLEMCEN, ANNABA SKIKDA, SETIF, HASSI MESSAOUD*
Volume d'affaires annuel	*781 millions de dinars*

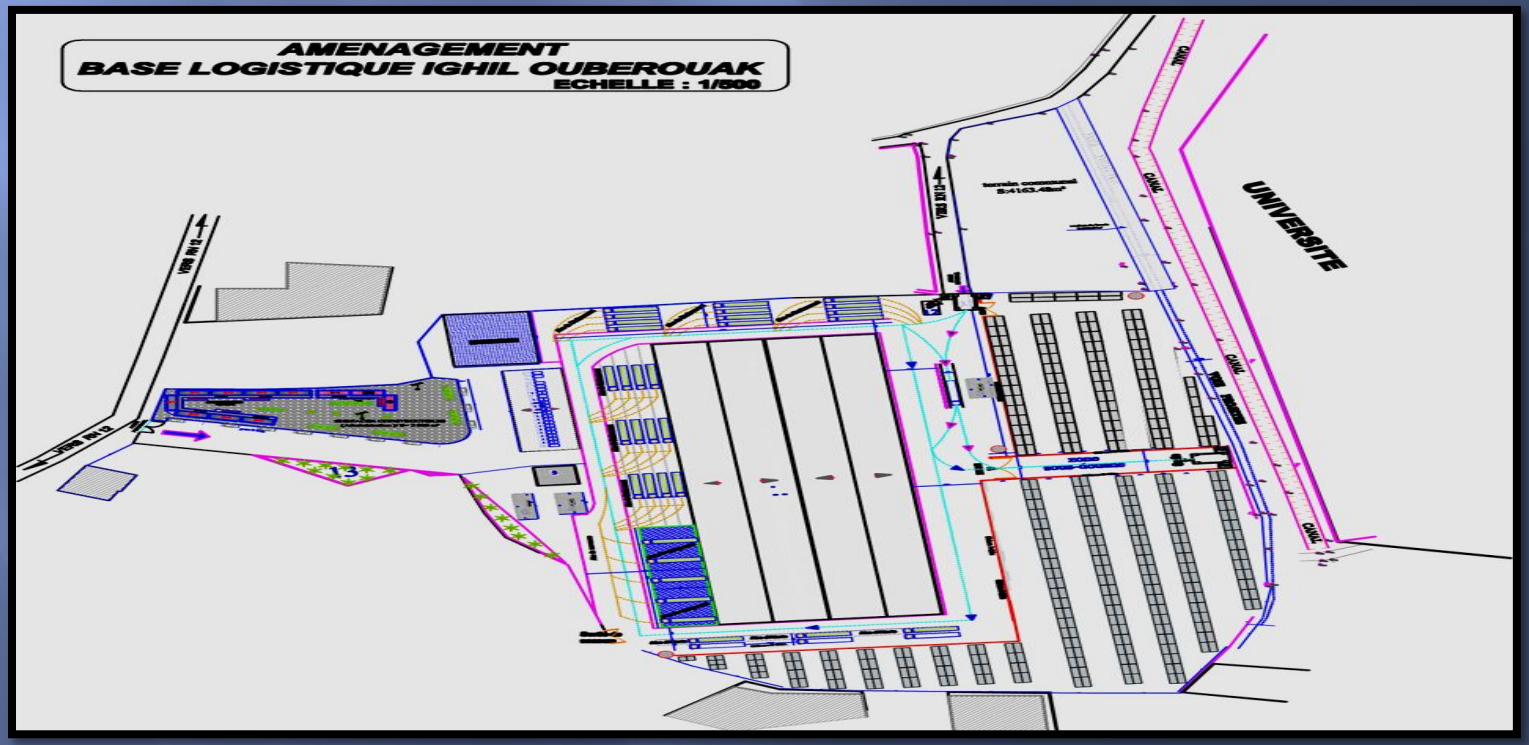
Partenariat
Groupe SNTR
APRC GROUPE

SNTR logistics

Dénomination	***SNTR LOGISTICS***
Siège Social	***35, rue Mohamed GARIDI – Kouba - ALGER***
Date de création	***2014***
Capital	***300 millions de dinars (51% GROUPE SNTR ; 49% APRC GROUP)***
Missions	***CONCEPTION*** ***REALISATION*** ***EXPLOITATION*** → ***PLATEFORMES LOGISTIQUES***
Projets Pilotes pour le premier semestre 2017	• ***Réalisation de 03 Plateformes Logistiques à OUED SMAR, ORAN et SETIF*** • ***Réalisation d'une Plateforme Logistique à TOUGGOURT*** • ***Réalisation d'une deuxième phase d'une cadence de 200.000 M2 / an***

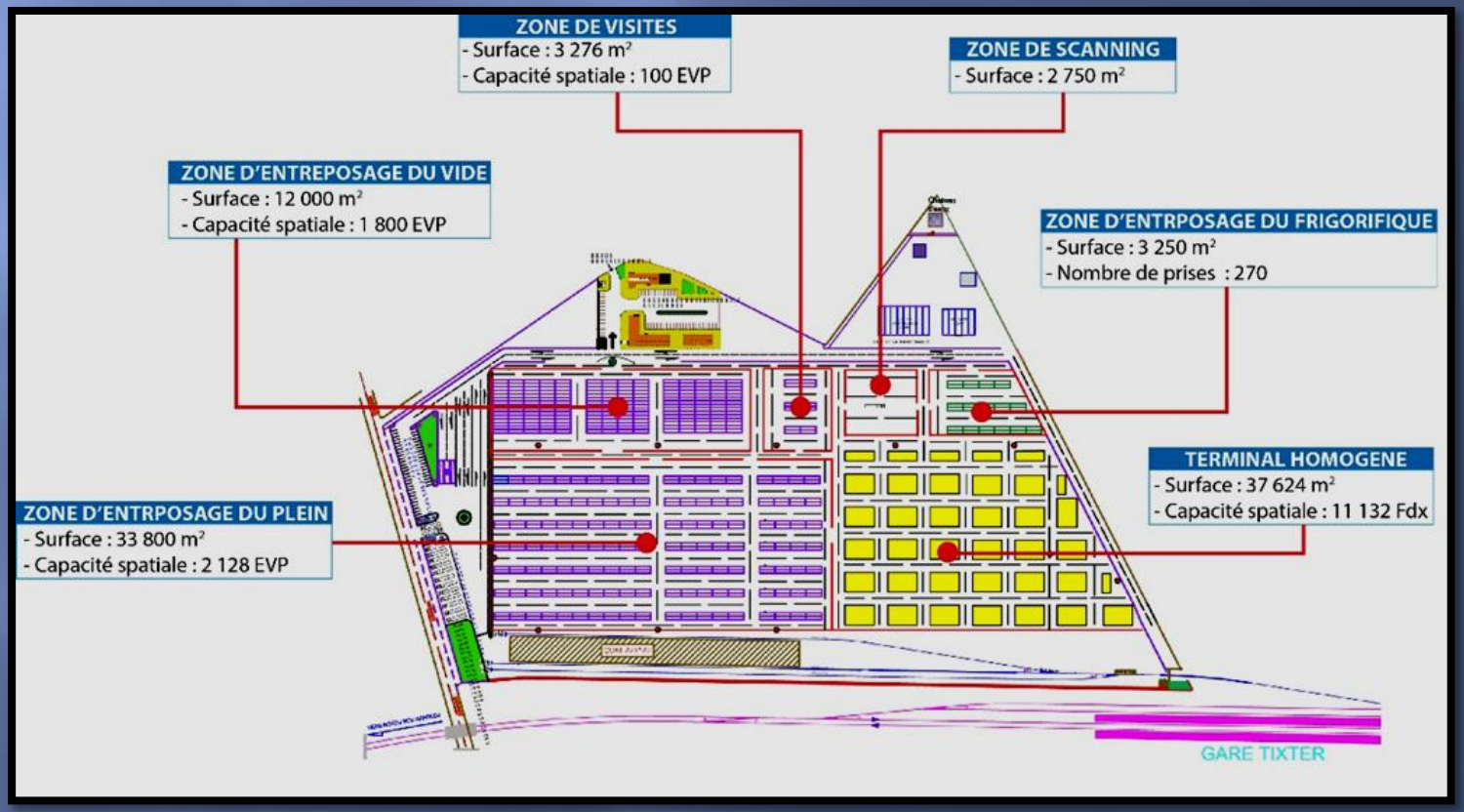
ZONE LOGISTIQUE EXTRA PORTUAIRE A IGHIL OUBEROUAK

La zone est d'une superficie totale de 48 560 m², elle sera organisée comme suit :	
• Une aire de stockage sous douanes	16 000 m²
• Hangar (magasins) sous douanes et hors douanes	10 200 m²
• Une zone libre pour les manipulations, immobilisations temporaires, installations et autres activités.	≤ 29 010 m²

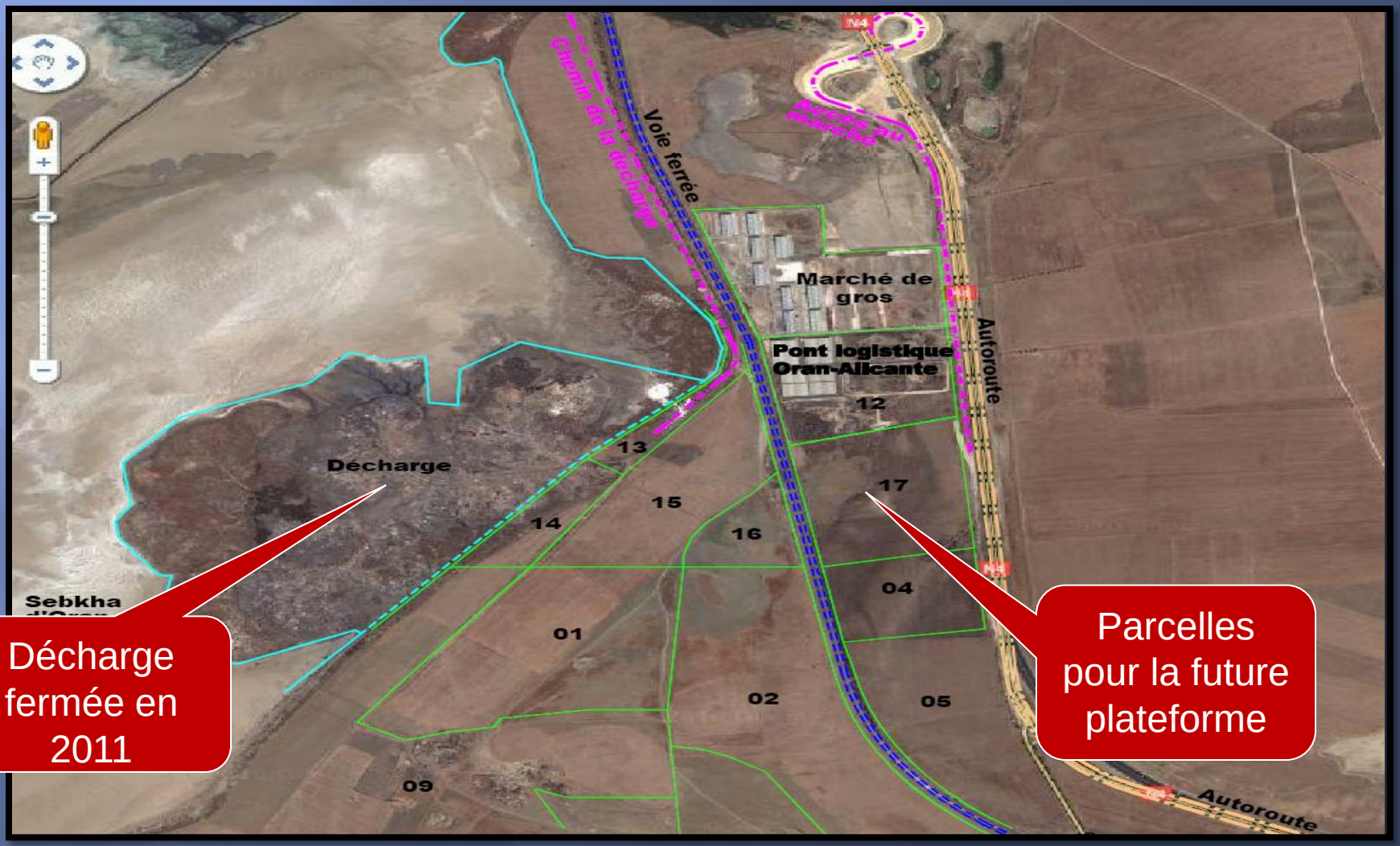


ZONE LOGISTIQUE EXTRA-PORTUAIRE A TIXTER

• Terminal ferroviaire et zone de réception des conteneurs	171 676 m²
• Zone de stockage (Hangars)	30 238 m²
• Espace immobilier locatif :	14 000 m²
• Terminal dédié pour les marchandises homogènes	120 000 m²
• Zone dédiée pour le stationnement des camions	15 000 m²
• Espace dédié pour concession	30 000 m²
• Plateforme logistique et auto motive	100 000 m²



Etude Projet Pilote PFL Oran
Image du Site



Atouts de la Région

- Réseau routier et autoroutier: réseau autoroutier et routier de 7020 km dont 1121 km de routes nationales, 2214 de cw, 3455 km de chemins communaux et ruraux,
- Disponibilité de 3 ports de commerce et un aéroport international,
- Un réseau ferroviaire développé avec accord cadre rail-ports,
- Activité économique dynamique et disponibilité de site approprié

Atouts du site retenu

- Capacité foncière pour un développement futur de la PFL : 116 ha
- Situé à 15 km au sud d'Oran et à 4 km de l'aéroport Es Senia,
- Terrain comprenant les parcelles suivantes à l'est entre l'autoroute Oran/Alger et voie ferrée double Oran/Sud du pays et aussi à l'ouest entre la voie ferrée Oran/Sud et décharge.
- Possibilités de raccordement avec réseaux autoroutier, ferroviaire. Proximité du marché de gros et du « pont Alicante » (synergies possibles et effet d'entraînement).
- Proximité de la ville d'Oran et de l'aéroport international Es Senia.

Facteurs dynamiseurs de Projets
Problèmes et Contraintes (I)

- En Algérie malgré quelques avancées enregistrées en logistique il reste toujours des insuffisances pour hisser sa logistique aux standards internationaux.

- En Algérie le marché de la logistique sur impulsions conjoncturelles se résument à la création de surfaces et infrastructures extra portuaires (Ports Secs et Magasins sous douanes)

- La présence accrue du secteur Privé qui représente plus de 75% en termes de nombres de création mais avoisine les 25% à 30% en terme de surfaces d'entreposage comparativement au secteur Public

- Ces surfaces ont contribué considérablement à soulager l'encombrement portuaire avec fluidification des trafics portuaires

- Une quinzaine de ports secs ont été créés et des investissements sont en cours de réalisation avec réorientation de la stratégie d'implantation et de création de ces zones logistiques sous forme de plateformes multimodales avec forte valeur ajoutée (Transformation, conditionnement, étiquetage, exportation, …) aux standards internationaux à l'exemple du port sec de Texter et SIL

Facteurs dynamiseurs de Projets Problèmes et Contraintes (II)

Contraintes

- La localisation dans le nord du Pays des centres d'approvisionnement et de consommation, près des villes portuaires (moins de 15% de la superficie total du pays abrite plus de 70% de la population) c'est ce qui explique le déséquilibre en matière de distribution et le peu d'engouement pour le développement de la logistique

- L'éparpillement et l'atomisation du tissu industriel, accentué par la diversité des sources d'approvisionnement des régions du monde conjugué aux problèmes liés aux ports (dragage, faible tirant d'eau, vétusté, contraintes d'extension…)et aux déséquilibres Import-export, font de l'Algérie le pays le plus cher de la méditerrané en fret avec un cout logistique moyen estimé à plus de 35% du PIB

- Le Marché compte peu ou presque pas de logisticiens internationaux

- Faiblesse du transport de marchandises par voie ferroviaire

- La réactualisation du dossier TIR en Algérie

Facteurs dynamiseurs de Projets Problèmes et Contraintes (II)

Contraintes

Le tissu économique de l'Algérie compte 959 718 entreprises répartit comme suit :

- **90,9% personnes Physiques**
- **8,1% personnes morales**

• Sur le total des personnes physiques plus de 82% représentent des Stés familiales qui dans la majorité sont très retissant:

- **Aux Déclarations de leurs activités (informelles) et le plus souvent ; ils intègrent en propre dans leur activité l'ensemble des activités connexes ou recourent directement au marché de l'informel compte tenu du bas prix obtenu sur ce segment**

• Aux Eventuels externalisation des activités notamment logistiques par peur de traçabilités et de confrontation d'informations fiscales

- **Déficit ou Manque de professionnalisme des prestataires de services en logistiques (beaucoup de bricolage)**

- **Cout de la prestation trop cher ; ce qui pousse les industriels ou entreprises à intégrer l'activité logistique dans le portefeuille de l'entreprise**

Facteurs dynamiseurs de Projets
Problèmes et Contraintes (III)

Passage portuaire :

- **Équipements anciens et peu adaptés pour la manutention des conteneurs**
- **Problème d'évacuation des conteneurs hors du port**
- **Manque de capacité sur les terminaux portuaires et les ports secs pour le stockage des conteneurs pleins (lié à des durées de stationnement trop longues)**
- **Dispersion du stockage des conteneurs vides (création non contrôlée de dépôts)**

Facteurs dynamiseurs de Projets
Problèmes et Contraintes (IV)

Procédures et contrôles des échanges internationaux :

- **Sous - utilisation des systèmes de transmission informatisés**
- **Non reconnaissance des documents officiels au format électronique**
- **Non reconnaissance des certificats de conformité internationaux**
- **Lenteur des contrôles de conformité (certificats d'origine) pour rareté des instituts spécialisés**
- **Contrôles de la douane trop fréquents (absence de capitalisation sur les risques et absence de ciblage pour les contrôles)**

Facteurs dynamiseurs de Projets
Problèmes et Contraintes (IV)

Statut et encadrement juridique :

- Absence du statut de commissionnaire de transport international,
- Accès banalisé à la profession de transporteur routier sans régulation (absence cadre régissant la fonction de transporteur avec conditions accès)
- Non application de la convention TIR
- Absence contrat transport = base professionnalisation et limitation informel
- Absence inter modalité (juridique et fonctionnelle)

Contexte plus général

- Formalités administratives pénalisantes pour les transactions,
- Poids du commerce informel, faiblesse du secteur bancaire.

Points forts:

- Réseau routes en développement : autoroutes E-W/Hauts plateaux, voies littorales/ pénétrantes.
- Infrastructures ferroviaires de bonne qualité : réseau en modernisation et en extension, une entreprise en cours de restructuration.
- Des services de transport combiné opérationnels et des projets de partenariat PPP réussi entre opérateur ferroviaire et manutentionnaire (Béjaïa);
- Des terminaux portuaires en cours de modernisation (Portek à Béjaïa, DPW à Alger et Djen-Djen, projet terminal Oran + Projet de port centre)
- Des solutions douanières efficaces ponctuellement à généraliser, magasins sous douane dans les entreprises, système de guichet unique en cours dans 3 ports

Mesures à Préconiser pour la Logistique (I)

- Mise en place de stratégie nationale en matière de logistique .
- Création d'un comité national de la logistique.
- Mise en place d'une Agence de développement de la logistique.
- Mise en place de capacités de formation en logistique

Mesures à Préconiser pour la Logistique (II)

- Mise a niveau de l'étude sur la situation de la logistique en Algérie.
- Confier la réalisation de la PFL pilote à la SNTR.
- Mise en place du dispositif législatif et réglementaire pour un meilleur encadrement de la logistique.

Merci pour Votre Aimable Attention

Mr. Abderrahim Lotfi BENYELLES
Point Focal Algérie
Logismed Soft

DGG
Deutsche GVZ-Gesellschaft mbH

Freight Villages in Germany

Steffen Nestler
Managing Director
Deutsche GVZ-Gesellschaft mbH

September 2016

Contents

Deutsche GVZ-Gesellschaft mbH

- DGG profile
- Freight Village (FV) characteristics
- FV Ranking in Germany and Europe

DGG profile

Deutsche GVZ-Gesellschaft mbH

- established in **1993** as national platform for FV development
- **GVZ** = Güterverkehrszentrum = **Freight Village (FV)**
- legal status: GmbH (**ltd company**), registered in Bremen
- since 1998 operated by Institute for Shipping Economy and Logistics, **Bremen** and LUB Consulting GmbH, **Dresden**
- effect for DGG: lean management and know-how transfer
- DGG is active in **research and consulting projects** on national and international level

FV Internet Portal

Deutsche GVZ-Gesellschaft mbH

Freight Village (FV) characteristics

FV characteristics

- settlement of transport-oriented companies, logistics service providers and **logistics-intensive trade and production enterprises** in a commercial area

- access to at least two modes of transport, in particular road/rail (**open access** intermodal terminal)

- **management function** of local GVZ developer/operator, who initiates cooperative activities in order to make use of synergies

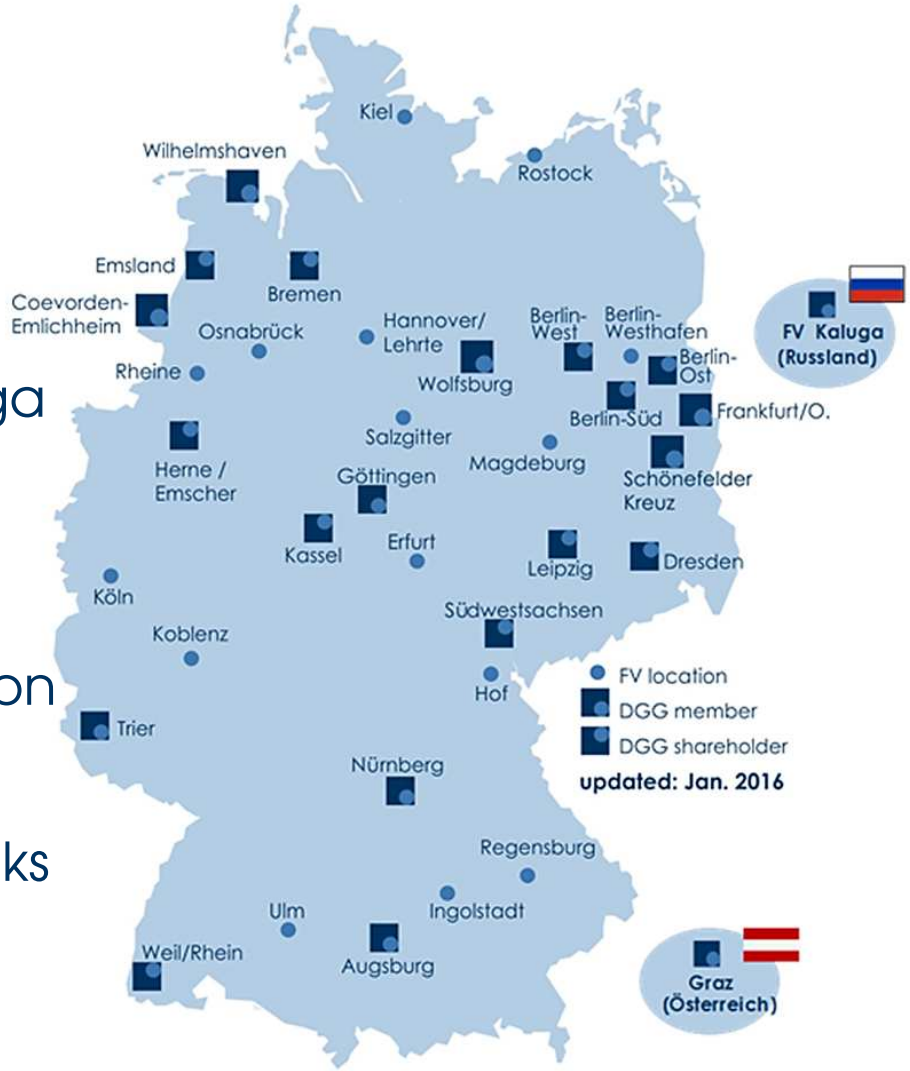
FV advantages

Deutsche GVZ-Gesellschaft mbH

- high-level road/motorway access and proximity to conurbations (short reaction and delivery times)
- intermodality increases commercial flexibility and investment security (present bonus or future option)
- low conflict potential (24h operation)
- co-operative activities (logistics activities, cost savings for telecom, energy etc.)
- wide service spectrum (truck service, customs clearance, etc.)
- extension areas

FV locations

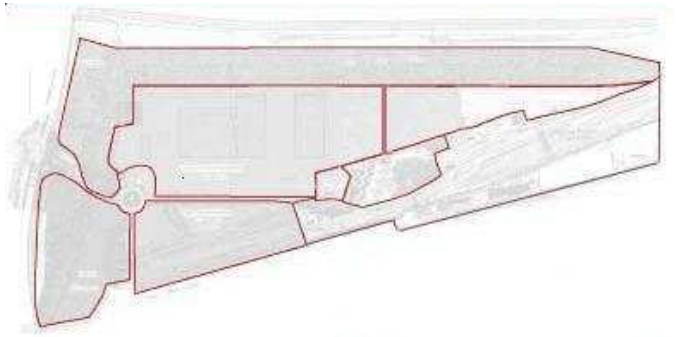
- 34 FV locations in Germany
- Highest FV density in Europe
- Cargo Center Graz and FV Kaluga associated DGG members
- Focus of cooperation:
  - intermodal terminal operation and services
  - new intermodal transport links



Economic effects of FVs

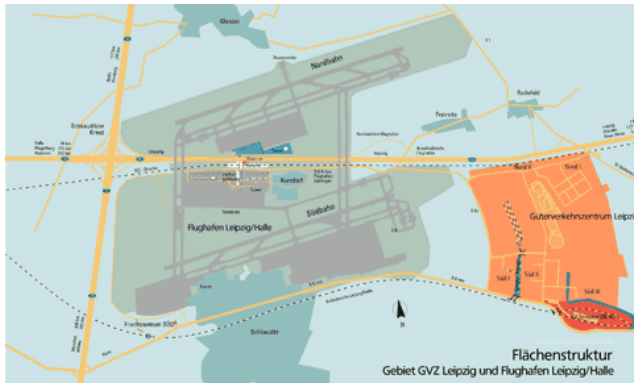
FV area size

FV Herne



23 ha

FV Leipzig



675 ha

Average area

ca. 211 ha

Freight Village Ranking

Germany FV Ranking 2012

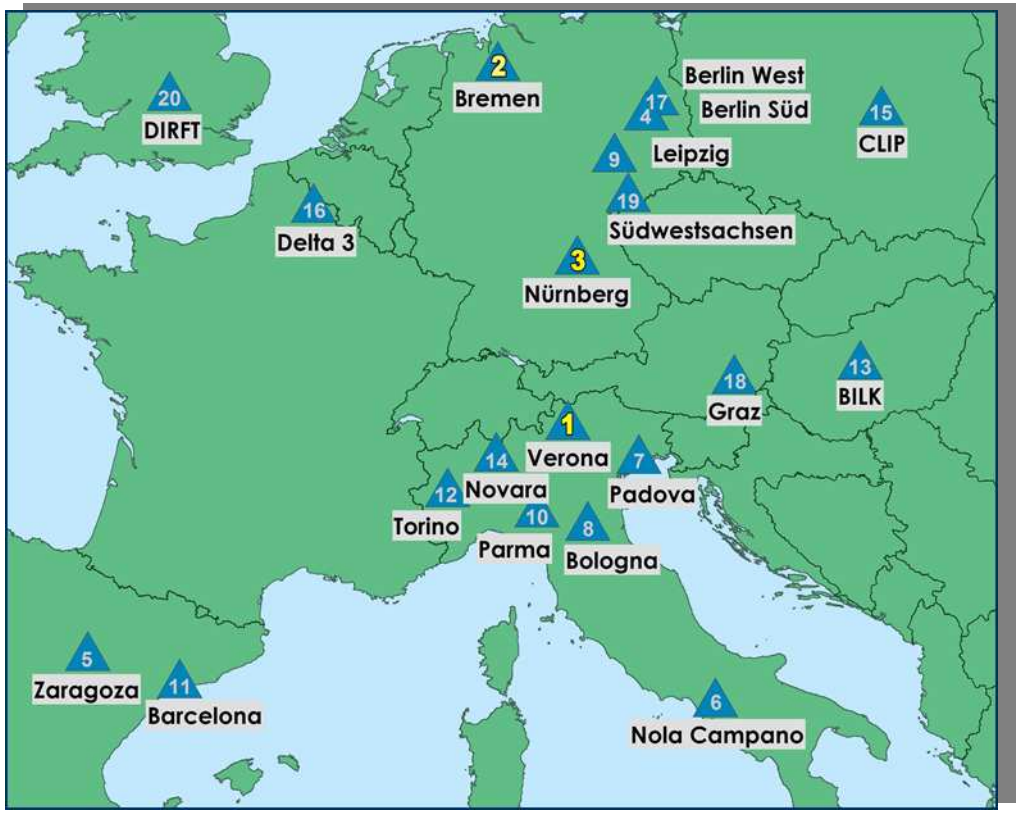
DGG
Deutsche GVZ-Gesellschaft mbH

Platzierung 2012	GVZ	Punkte
1	**Bremen**	**273**
1	**Nürnberg**	**273**
3	**Berlin Süd**	**270**
4	Leipzig	243
5	Glauchau	237
6	Emsland	227
7	Berlin West	215
8	Erfurt	207
9	Europark Coevorden-Emlichheim	201
10	Dresden	199
11	City GVZ Berlin	196
12	Berlin Ost	194
13	Kassel	188
14	Emscher	187
15	Trier	165
16	Augsburg	164
17	Göttingen	161
18	Rheine	153
19	Frankfurt Oder	145
20	Wolfsburg	131

European FV Ranking 2015

Deutsche GVZ-Gesellschaft mbH

1. Interporto Verona
2. GVZ Bremen
3. GVZ Nürnberg
4. GVZ Berlin Süd Großbeeren
5. Plaza Logistica Zaragoza
6. Interporto Nola Campano
7. Interporto Padova
8. Interporto Bologna
9. GVZ Leipzig
10. Interporto Parma
11. ZAL Barcelona
12. Interporto di Torino
13. BILK Logistics Centre (Budapest)
14. Interporto Novara
15. CLIP Logistics (Poznan)
16. Delta 3 Dourges (Lille)
17. GVZ Berlin West Wustermark
18. Cargo Center Graz
19. GVZ Südwestsachsen
20. DIRFT Daventry



Perspectives

Deutsche GVZ-Gesellschaft mbH

Comprehensive results are published in Volume 6 of the DGG series „Macrologistics Nodes“

DGG
Deutsche GVZ-Gesellschaft mbH

Thank you for your attention!

CIMALSA

WORKSHOP ON THE LOGISMED LOGISTICS PLATFORMS

September 2016

CIMALSA
Centres logístics
de Catalunya

Generalitat
de Catalunya

www.cimalsa.cat

Company history

Generalitat de Catalunya

Generalitat de Catalunya
Departament de Territori i Sostenibilitat

CIMALSA
Centres logístics de Catalunya

CIMALSA is a public company of the Government of Catalonia entrusted with promoting, developing and managing infrastructures and centers for goods transport and logistics

CIMALSA designs its centers specifically for logistic and transport activities, offering the maximum standards of accessibility, quality and services both to companies and to workers

CIMALSA's mission is to offer the transport and logistic sectors the best locations for their competitiveness.

CIMALSA includes intermodality as an axis of all new projects.

The centres developed by CIMALSA will promote the creation of 13,000 jobs.

WHAT DOES CIMALSA ?

- Plans

↓

- Implants in the territory

↓

- Promotes

↓

- Manage

Intermodal logistic Centers and infrastructures for transport

COMMON OBJECTIVES

Objective: stimulate the development of The Catalan Economy.

Through

Public and private enterprises

Cimalsa ready to collaborate in initiatives

For to share common objectives

Transport companies concentrated in Poblenou

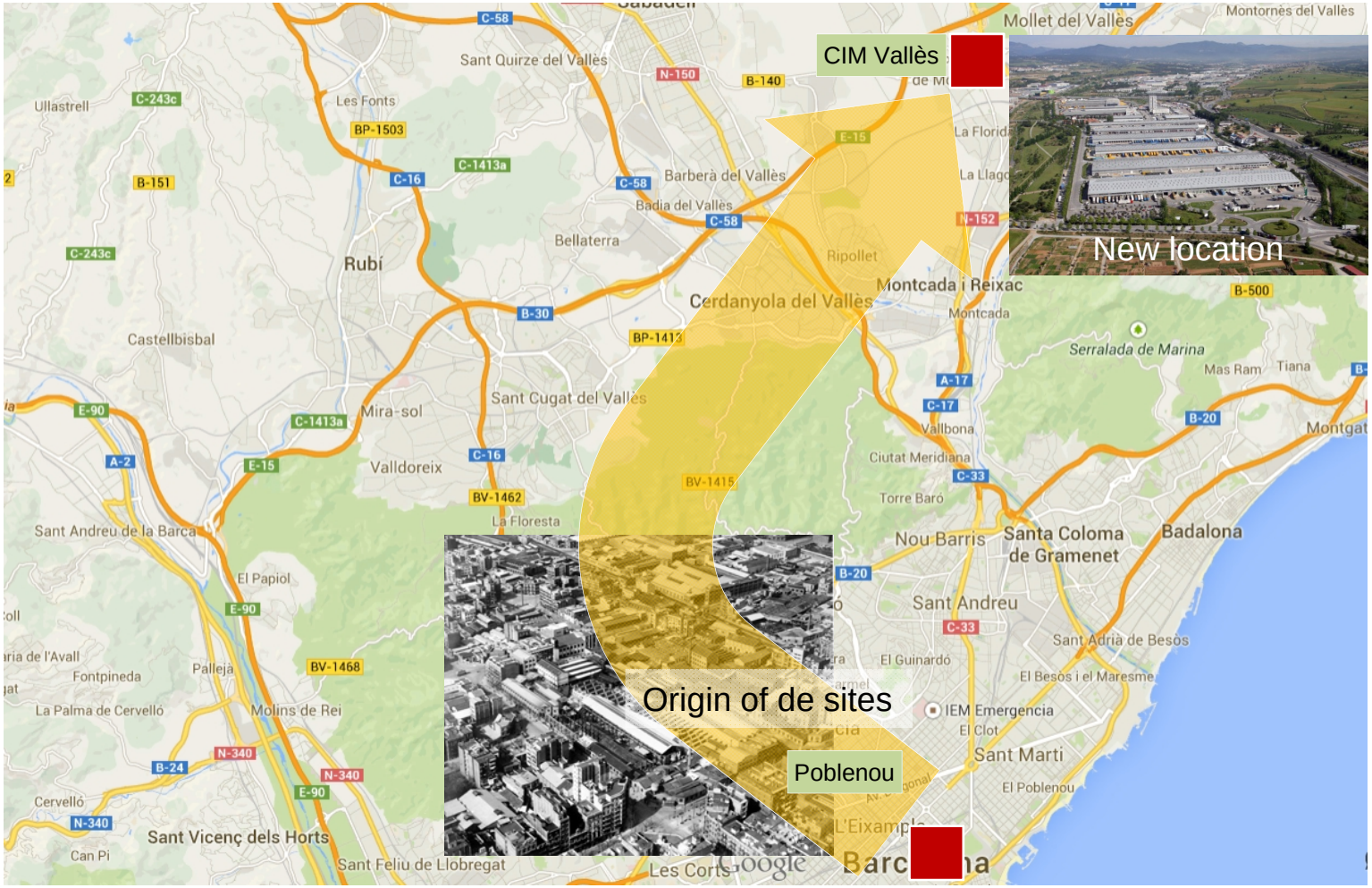
Friday,
October 17, 1986 (13:32 hours)

The President of the International Olympic Committee announces the proclamation of Barcelona 92

PASQUAL MARAGALL i MIRA
Mayor of Barcelona

Olympic Village
Barcelona 92

Transport companies: new destination

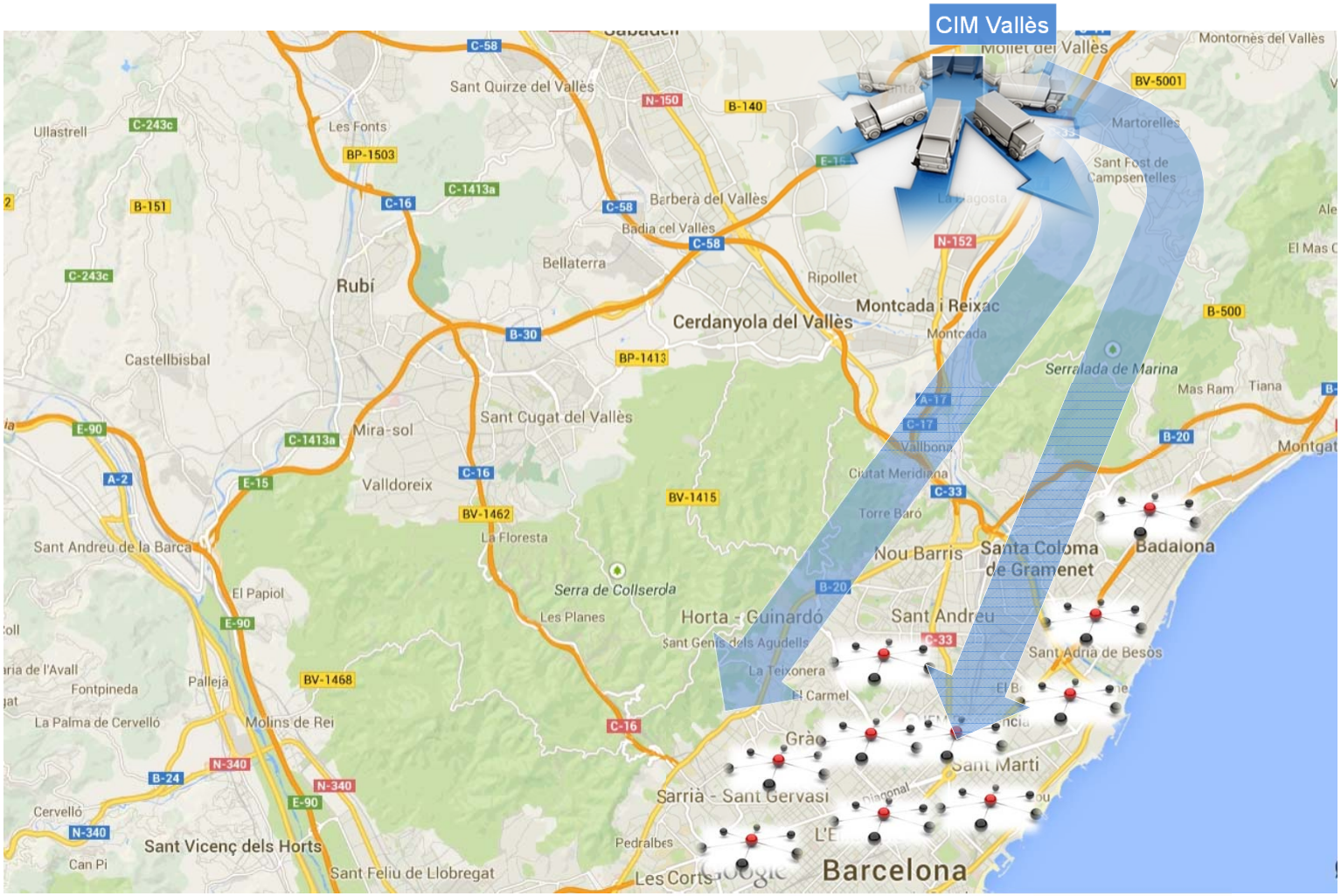


CIMALSA logistics centers

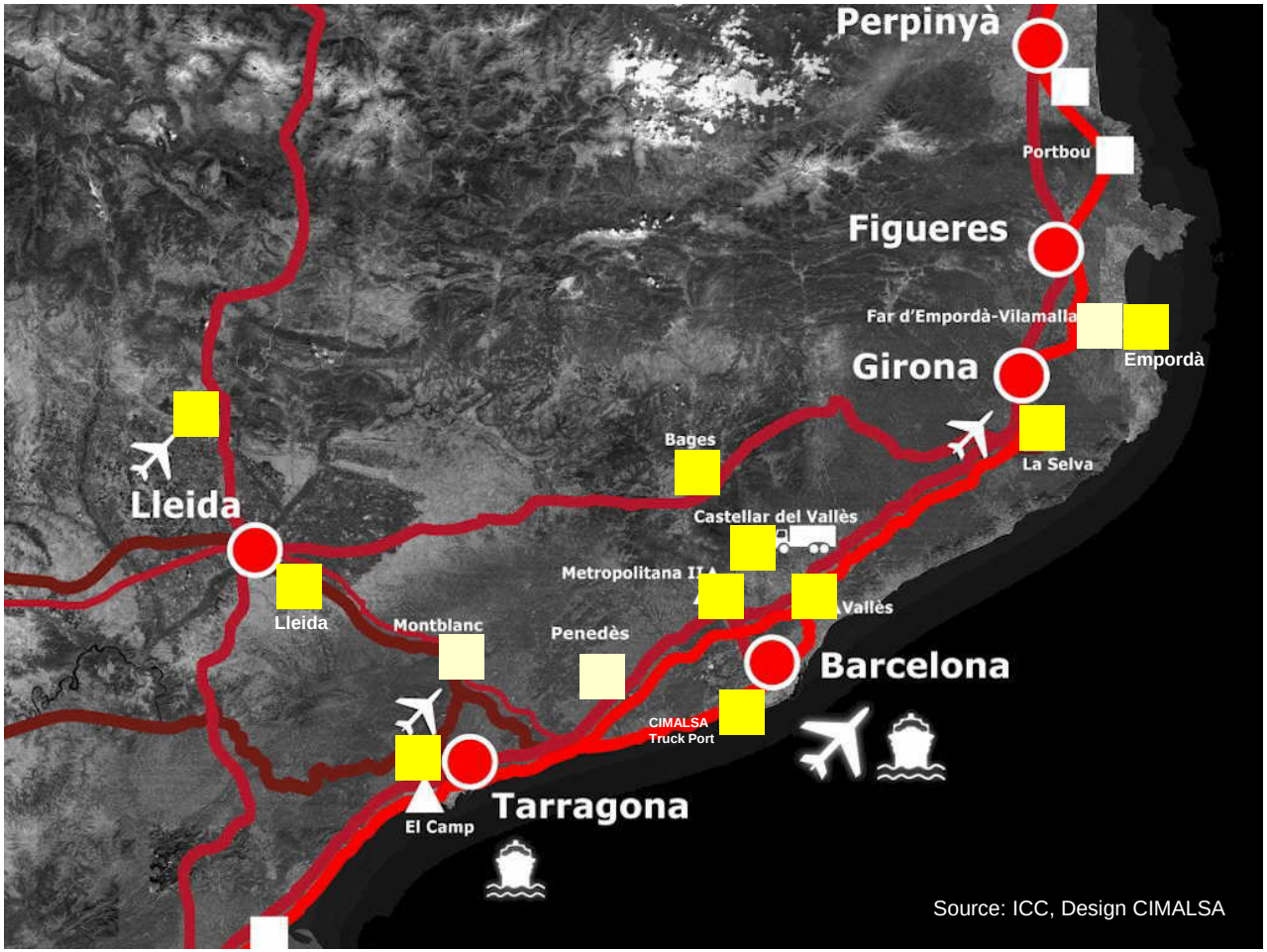
CIM VALLÈS
The North Metropolitan Logistic Platform

Total surface area	44,2 ha
Logistics area	21 ha
Services area	6,8ha
Companies	72
Jobs	2.300

NEW DESTINATION
E-COMMERCE DISTRIBUTION POINTS



Network of logistics centers and infrastructure



- Since its creation, in 1992, CIMALSA has developed over 850 ha of logistics ground and infrastructures.

- CIMALSA is the most important logistics ground promoters of Catalonia

- **CIM VALLÈS**
- **CIM LLEIDA**
- **CIM LA SELVA**
- **CIM EL CAMP**
- **LOGIS BAGES**
- **LOGIS EMPORDÀ**
- **CIMALSA TRUCK PORT (Castellar Vallès)**
- **CIMALSA TRUCK PORT (Barcelona)**
- **AEROPORT LLEIDA-ALGUAIRE**

- *LOGIS INTERMODAL EL FAR D'EMPORDA -VILAMALLA*
- *LOGIS INTERMODAL PENEDÈS*
- *LOGIS INTERMODAL MONTBLANC*
- *CIM LLOBREGAT*

CIMALSA MODEL: EXPERIENCES AND ADVANTAGES

BUILDERS PROMOTERS LOGISTICAL INTERMODAL INFRASTRUCTURES

TRUCK PARKING CASTELLAR VALLÈS

TRUCK PARKING PORT BARCELONA

INTERNATIONAL AIRPORT LLEIDA-ALGUAIRE

VILAMALLA RAIL TERMINAL

LOGIS INTERMODAL EMPORDÀ

LOGIS INTERMODAL PENEDÈS

LOGIS INTERMODAL MONTBLANC

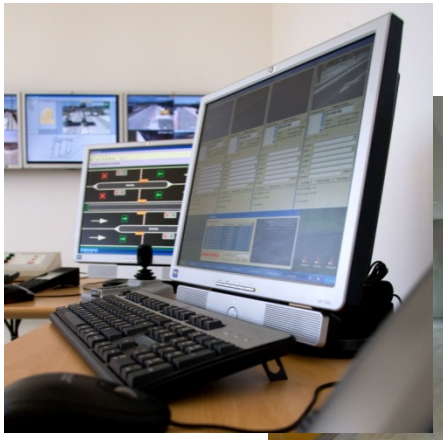
SERVICE COMMITMENT

CIMALSA: Adding value to public initiative logistics centers

Offers full services for vehicles, workers and companies

Quality public services:

- Administration
- Security and surveillance
- Maintenance, cleanliness.
- Gardening
- Optical fiber
- Pipeline fire services
- Permanent service



COMMITMENT TO ENTERPRISES, SERVICES CHARTER

CIMALSA designe a **Services Charter**

Services Charter sets forth principles and commitments to companies.

Owners and users are informed on compliance, quality and cost of services provided

Services

- Information Point.
- Business Companies promotion
- Representation before Government and Authorities
- Central purchasing
- Sustainability actions
- Periodic satisfaction surveys.

COMMITMENT TO ENTERPRISES, SERVICES CHARTER

Sustainability

- Installation of photovoltaic panels on the roof of some of our buildings: CIM la Selva, CIM el Camp and LOGIS Bages
- Energy savings: consumption careful monitoring

ENVIRONMENTAL POLLUTION LIGHT

The Government of CATALONIA promotes new regulations to reduce overall electrical cost and encourage the reduction of light pollution

CIMALSA provides optimal management of the resource to their owners and users

Reduce the final cost
(Consum & Maintenance)

Replacing existing lighting points for highly efficient points

GLP (GAS PETROLEUM LIQUID)
GNV (GAS NATURAL VEHICULAR)

Cimalsa implemented alternative Gas
CIM VALLÈS 2014

GLP 58

Gas liquat de petroli. Se submnistra a vehicles turismes.

GNV GNL 4 GNC 13

Gas Natural Vehicular. Se subministra en estat gasós (GNC) per a vehicles turismes, i en estat liquat (GNL) per a vehicles industrials.

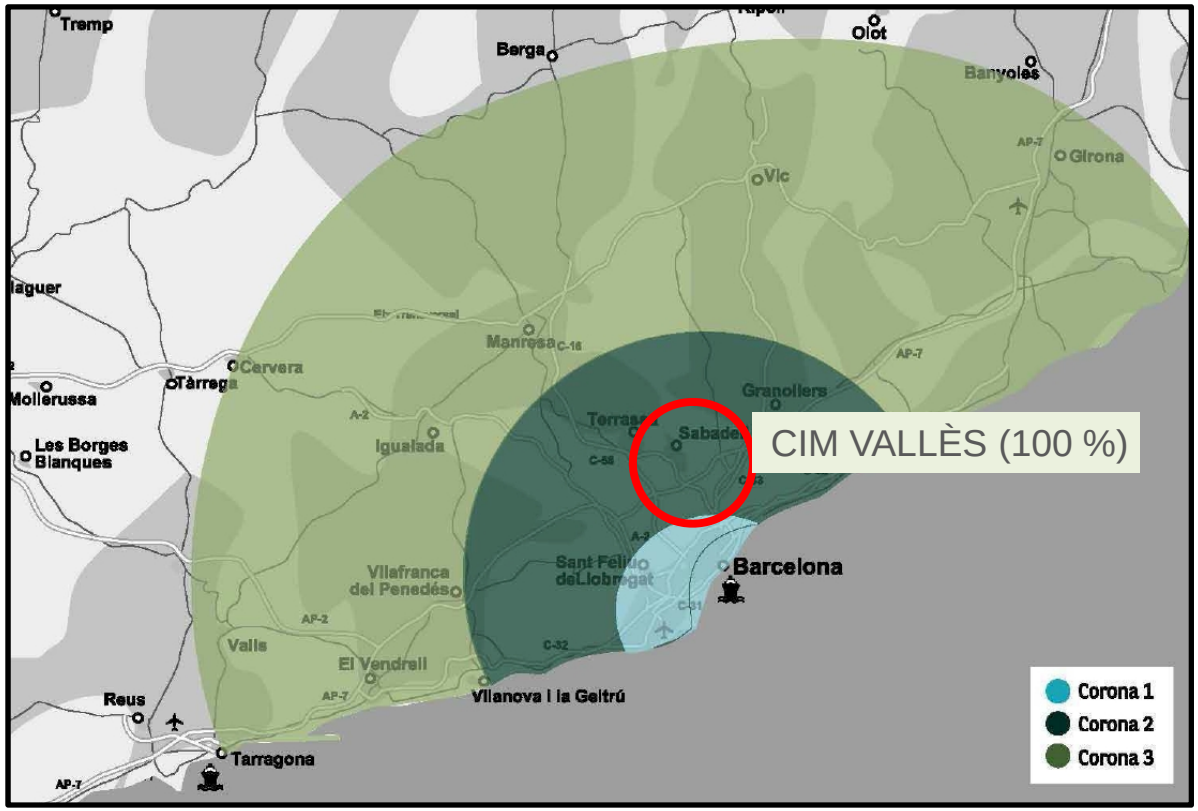
LOGISTICS ZONE IN CATALONIA

CAPACITY (%)

1a ZONE :
82,86%

2a ZONE :
76,13%

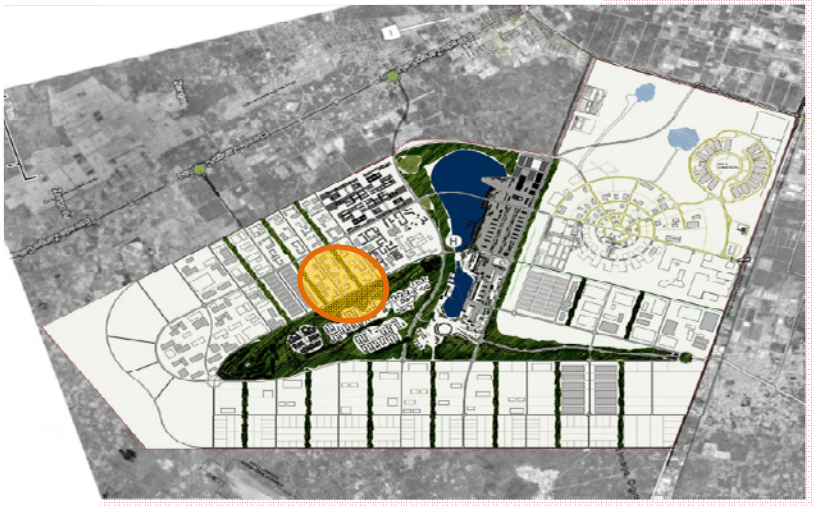
3a ZONE: 66,04%



CIMALSA
INTERNATIONAL ACTIVITY

CIMALSA: knowledge and experiences open to public and private agents worldwide

INTERNATIONAL PROJECTS



MASTER PLAN ECONOMIC & INDUSTRIAL ZONE LUANDA (ANGOLA)

MANAGE PLANNING LOGISTIC TECNOLOGIC -INDUSTRIAL ZONE YACHAY (ECUADOR)

Keys to sustainable mobility

The future is here

XX Century

XXI Century

Transport and sustainable mobility

EV

Urban distribution

CIMALSA

WORKSHOP ON THE LOGISMED LOGISTICS PLATFORMS

September 2016

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Generalitat
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www.cimalsa.cat

Middle East and North Africa Transition Fund

European Investment Bank The EU bank

Guide for the establishment of the Logismed Logistics Platforms (LLPs)

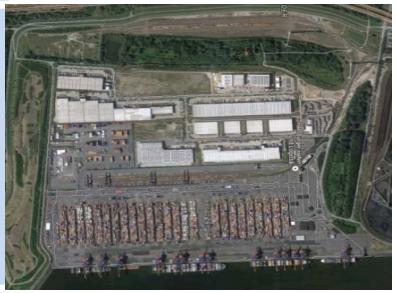
Table of Contents

1. Types and users of the LLPs

Types of logistics platform

Logistics platform types vary widely depending on

→ The scope of its hinterland
→ Degree of intermodality / multimodality
→ Level of specialization.

Distribution logistics platform ▪International ▪National ▪Regional ▪Metropolitan	PLAZA – Zaragoza (Spain)	
Port logistics activity zone	Altenwerder in the port of Hamburg (Germany)	
Air freight centre	Alliance in Fort Worth (United States)	
Logistics centres with rail intermodality (dry ports)	CIM Novara Interport (Italy)	
Agri-food logistics centres ▪Agribusiness platforms (central markets) ▪Agribusiness parks	Central de Corabastos Bogotá (Colombia)	
Border logistics centres	S.L Rio Colorado (Sonora, Mexico)	
Cluster logistics centres	Metal-mechanic cluster, Parque Central (Cartagena, Colombia)	

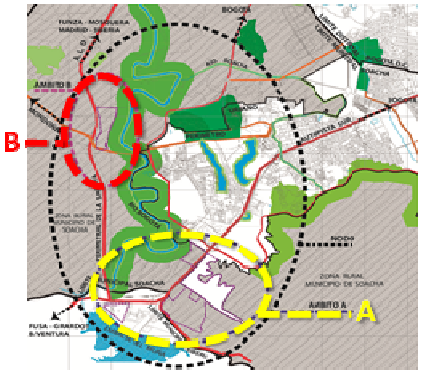
Nature of the users and operators in the LLPs

Contribution of users to the strategic goals of the LLPs					
	Key users with the capacity to make practical improvements to logistics processes	**Users that help disseminate practical improvements to logistics processes on a national/regional level**	**Users that can incorporate the improvements to enhance their logistics processes**	**Users that help support and encourage logistics outsourcing**	**Users that support intermodality**
Users in logistics areas					
Transport operators (1PL)			**Critical**	**Critical**	**Critical**
Storage companies (2PL)	Positive	Positive	**Critical**	**Critical**	Positive
Cross-docking and partial load operators (2PL)	**Critical**	**Critical**	**Critical**	**Critical**	Positive
National and international operators (3PL)	**Critical**	**Critical**	**Critical**	**Critical**	Positive
Shippers and cargo owners				**Critical**	
Users in service areas					
Companies that provide carrier and vehicle services	Positive	Positive			
Container services companies	Positive	**Critical**	Positive		Positive
General services, security and maintenance companies	Positive				
Companies and organizations that provide supply chain and international trade services	**Critical**	**Critical**			Positive
Users in intermodal areas					
Intermodality operators	**Critical**				**Critical**

2. A guide to the technical features of the LLPs

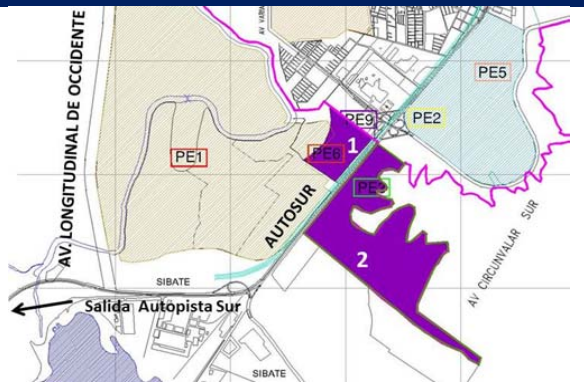
3.3.1. Location of an LLP

Macro-location



Macro-location of Soacha platform, Bogotá (Colombia)

Micro-location



Possible micro-locations of Soacha platform (Colombia)

CRITERIA FOR THE MACRO-LOCATION

- Selection of a territorial hub
- Relationship with planning
- Regional or metropolitan logistics
- Logistics function of the different regional hubs
- Territorial logistics concentration
- Synergies with the environment
- Relationship between functional orientation and land prices

CRITERIA FOR THE MICRO-LOCATION

- Area available
- Land development feasibility
- Environmental feasibility
- Physical characteristics of the land
- Rights-of-way and pre-existing conditions
- Micro-accessibility
- Connections to services
- Land management
- Land prices
- Social and territorial effects

The best platform is not the one that is theoretically most suitable, but the one that is feasible within a reasonable time frame.

Overall pre-sizing of a LLP

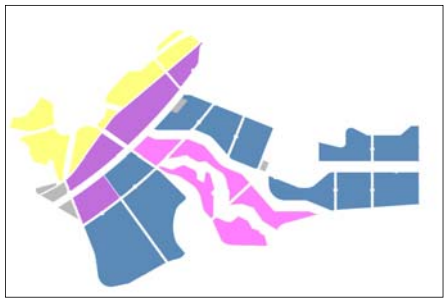
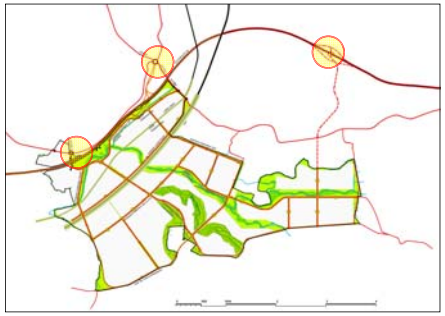
Gross area of the platform (in ha) = T (amount of traffic estimated for the platform, in millions of t/year) x 100 / K (average t/m^2)

Values for K:

- Average value: K = 3.5 t/m2 (gross)
- Value based on a platform with high turnaround: K = 4.5 t/m^2 (gross)
- Value based on a platform with low turnaround: K = 2 t/m^2 (gross)

Pre-sizing a platform is always a complex process: there are insufficient analyses of international standards by type and size of urban nodes.

Structure of the functional layout of the LLPs

Functional areas of the LLP	• **Logistics areas.** • **Service areas.** • **Intermodal areas.**	Functional areas of an LLP 
General systems of an LLP	• **The arterial, high-capacity road system.** • **The system of open spaces (green spaces).**	General systems of an LLP 

Recommendations for the layout

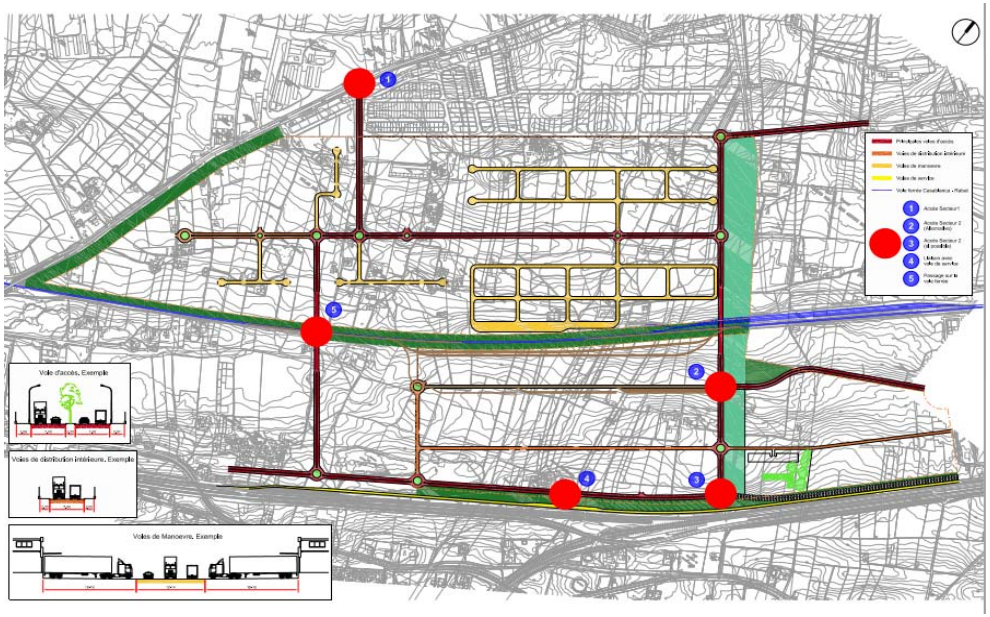
- A main entrance to LLP and a second, emergency access point for platforms of a certain size (e.g. over 40-50 ha).
- Service areas should have a relatively independent location in the entrance area (in operation 24 hours a day).
- Intermodal areas may be incorporated into logistics areas or function independently.
- To consider potential logistics areas that operate independently.
- Open spaces can be used to provide the entire LLP with a common identify through distinctive landscaping.

Il faut distinguer deux niveaux différents de définition lors de la conception d'une PLL :
- **Le plan de conception globale de la PLL.**
- **Et le plan de conception de chacune de ses zones fonctionnelles intérieures.**

Système de voirie interne des PLL

Arterial network: for traffic and general distribution

- No parking of trucks and light vehicles directly on the carriageway.
- No direct access to plots and facilities.
- No left turns that should be facilitated by means of roundabouts.



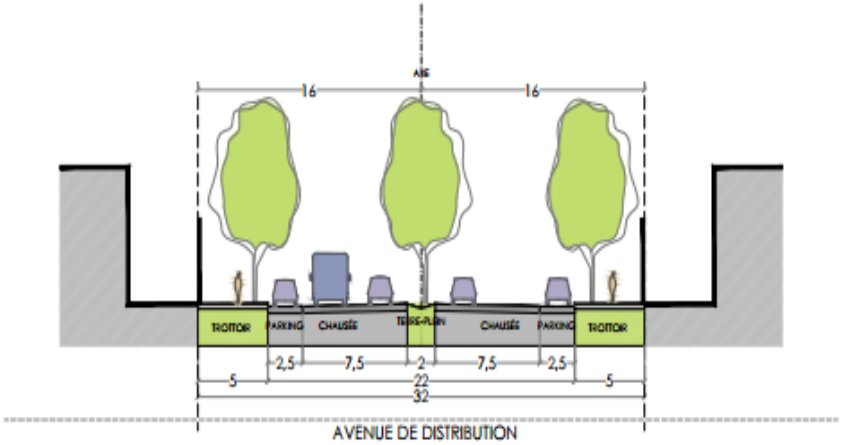
Secondary network

- Local roads.
- Manoeuvring roads.
- Perimeter roads.

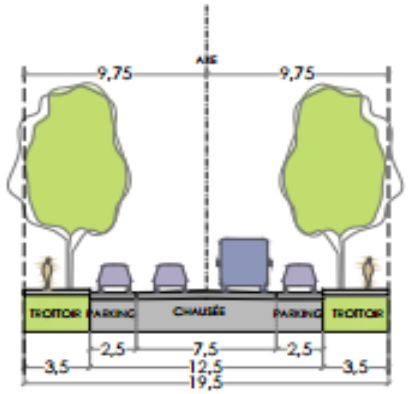
Two different levels in the process to design an LLP have to be distinguished:

- **The overall design plan of the LLP.**
- **And the design plan for each of the internal functional areas.**

Dimensions of the road system



A cross-section of an arterial road system



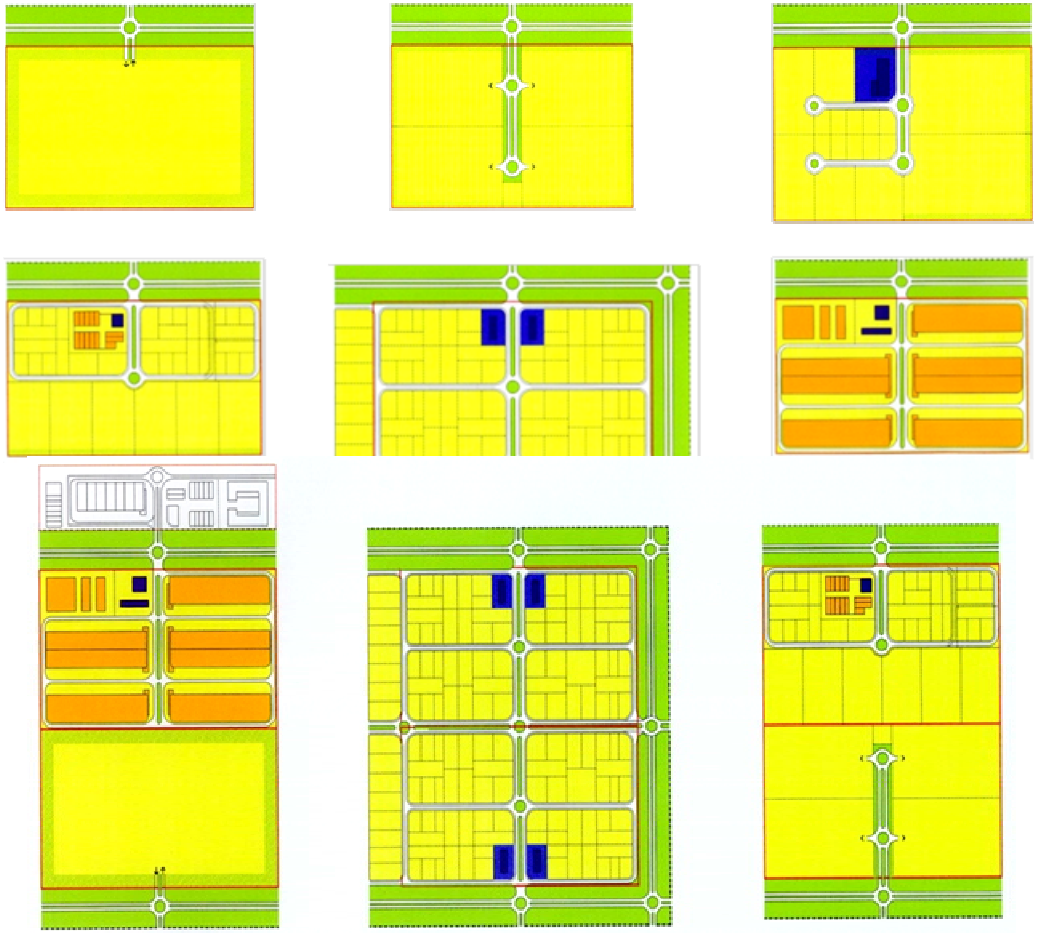
A cross-section of a secondary road system

Type of offer in logistics areas

The concept of superblocks

A superblock is a basic layout macro-unit for warehouses. It has an average size of around 4 to 5 ha and a regular, rectangular shape. Its dimensions allow it to be subdivided in a range of different ways.

- **Multiple plot superblocks,** designed as closed units, with operations carried out inside.
- **Integrated warehouse superblocks** that share turning areas.



Most platforms have short-term demand forecasts, but medium- and long-term demand is much harder to predict. This makes it essential to offer a flexible and versatile layout in logistics areas.

Integrated warehouse types

Type	Description	Examples
Type A: integrated warehouses for high-turnaround activities Warehouses to facilitate the turnaround of goods or cross-docking.	➢ Depth < 45/50 m. ➢ Layout as open as possible. ➢ Loading and unloading on two facades, a maximum number of doors and raised loading docks on the facade. ➢ Clear height up to 7 or 10 metres.	
Type B: Integrated warehouses for low-turnaround activities Very deep warehouses designed for maximum long-term storage capacity.	➢ Depth of warehouse: around 100 metres. ➢ Clear height: 12 to 13m. ➢ One opened facade with raised loading docks. ➢ Standard commercial modulation: 2,000 to 2,500 m2 of warehouse per module.	
Type C: Integrated warehouses with multi-purpose modules In most of the LLPs in developing countries, aimed at small and medium-sized clients, to carry out different activities.	➢ Warehouses with 500 to 1,000 m2, modules that can be grouped together. ➢ Each module has a minimum facade of 12 to 15 metres. ➢ The recommended clear height is 10 to 12 metres.	

This kind of demand, which often represents a very important segment of the local market, should always be directed towards integrated modular warehouses .

Recommended features for a Class-A logistics warehouse

- Minimum clear height of 10 metres.
- Platform with hydraulic lift and height of 1.2 metres.
- Number of loading docks: A minimum of 1 loading dock for every 1,000 m2 of warehouse.
- Truck manoeuvring area of at least 32 metres (in case of exclusive turning area) and 50 metres (for shared areas).
- Land with a load capacity of 5 tonnes/m2, planimetry type TR34FM2.
- Fire protection with NFPA- or F-compliant fire sprinkler system.
- Natural lighting of over 4%.
- Indoor fluorescent or LED lighting with a minimum of 150 lux.
- Concrete area to support trucks.
- Roof: flat, ideally with membrane.
- Insulation: non-flammable, stone wool.
- Security booth at the entrance to the enclosure (in the case of warehouses on independent plots).
- Building frame measuring a minimum of 12 x 24 metres (distance between columns).
- Area for order preparation (20 m), free of columns.
- Battery-charging facility.
- Offices with changing area and showers for workers.
- Compliant with the regulations in force in each country.

Design of service areas

Group of services	Possible service units
Integrated service centre	• Administrative area. • Logistics and transport company offices and business centre. • Restaurant and hotel services. • Complementary commercial services. • Social, religious services, etc.
Vehicle service centre	• Fuel station. • Parking for heavy goods vehicles. • Repair shops. • Technical vehicle inspection services.
Container services (container freight station)	• Container platform. • Container consolidation and deconsolidation facilities. • Container repair shops and services. • Empty container depot.
Customs and foreign trade services	• Customs and custom-related offices. • Tax inspection facility.

The service centre is considered the most valuable and representative area of a logistics platform.

Design of intermodal areas

Its design must correspond to decisions regarding its operation and functioning:

- Step 1: Determine the **functional and commercial needs of the potential operators** of the intermodal area and clients of the associated logistics area.
- Step 2: Define the **operational model** of the intermodal area.
- Step 3: **Detailed layout** of the intermodal area**.**

Freight rail terminal types

- ***Intermodal container terminals***

- ***Specialized non-containerized load terminals***

- ***Dedicated terminals***

Intermodal areas require large spaces with important operational requirements and involve significant investments that are not always recovered through the revenues generated.

Service infrastructure in a logistics platform

Public utilities normally required for logistics platforms:

- Water supply system.
- Irrigation network.
- Fire hydrant system.
- Sanitation: storm drain system.
- Sanitation: wastewater disposal system.
- Electrical power network: medium and low voltage.
- Public lighting network.
- Internal telecommunications network.
- Gas network.
- Installation of services tunnels or buried ducts in logistics platforms.
- Collection of waste from the logistics platform.

Recommendations:

- **Consider international best practices.**
- **Consider national and local regulations.**
- **Specific needs of logistics platforms, with flexibility**

3. A guide to the services in the LLPs

Services in a logistics platform

Essential services → **Logistics services**

Complementary services → **Non-logistics or complementary services**

- ✓Basic services
- ✓General services
- ✓Functional logistics services
- ✓Cluster or value-added services

A logistics platform is a large service centre. The services provided have wide-ranging features and extremely complex flows.

Target logistics services according to logistics platform type

Service types	Service providers	DLP	PLAZ	AFC	DP	AFLC	BLC	CLC
• Long-distance transport and distribution services	• All types of transport sector companies	**CR**	**CR**	**CR**	**CR**	**CR**	**CR**	**CR**
• High-turnover logistics services (cross-docking, parcels)	• Partial load companies, parcels • Logistics operators 3PL	**CR**	D	**CR**	**CR**	**CR**	D	**CR**
• Low-turnover logistics services	• Warehouse companies • Logistics operators 3PL	**CR**	**CR**	CO	D	D	CO	**CR**
• Value-added logistics services	• Logistics operators 3PL • Warehouse companies	D	D	CO	CO	**CR**	CO	**CR**
• Rail intermodality services	• Intermodal rail operators • Logistics operators	D	D	NN	**CR**	NN	D	D
• Port intermodality services	• Shipping/stowage companies • Terminal operators	NN	**CR**	NN	NN	NN	NN	NN
• Air freight services	• Air freight companies • Handling agents • Couriers and groupage operators • Cargo agents	NN	NN	**CR**	NN	NN	NN	NN
• Specialized cluster services	• General logistics operators • Cluster operators	CO	CO	NN	CO	**CR**	CO	**CR**

They are the fundamental basis of the objective of an LLP and are provided by the direct users of the platform to the logistics and distribution companies in their vicinity .

Basic services

Service	Modes of delivery by the LPDS	Level of necessity
Maintenance of infrastructure (roads, pipes, lighting)	• Direct delivery by the platform or indirect delivery (outsourced). • Indirect delivery for maintenance of more specialized infrastructure.	• **Critical**
Security (access control, general security)	• Indirect delivery by specialized services. • Combination of methods.	• **Critical**
Environmental services (including waste collection)	• In general, indirect delivery by specialized companies or public service providers. • Sometimes with a common management company.	• Desirable
Public transport (employee transport to external interchanges, internal transport)	• Generally a public service, sometimes promoted or supported by the platform management company. • In some cases, organization of cooperative transport to interchanges with the general network.	• Desirable

Services that are normally provided by the LPDS by means of different delivery methods: directly provided by the LPDS, indirectly provided or entrusted to the community of co-owners, much like a condominium

General services in the LLPs

Service	Recommendations for delivery of the service	Level of necessity
Integrated service centre		
• Restaurant and hotel services • Complementary commercial services	• In the service centre. • An open, competitive regime.	**CR**
• Administrative area • Offices for logistics and transport companies and business centre	• Range of offices in the service centre. • An open, competitive regime.	D
• Social, religious services, etc.	• Spaces provided by the LPDS. • Provided by public and private third-party companies.	D
Vehicle service centre		
• Petrol station	• Preferably by means of a concession granted to an operating or distribution company.	**CR**
• Parking for heavy goods vehicles	• Preferably by means of a concession granted to a specialized operator.	**CR**
• Repair shops	• Concession granted to specialized companies. • An open, competitive regime.	CO
• Technical vehicle inspection services	• Provided by an authorized operator. • Exclusive concession.	CO
Container services (container freight station)		
• Container area • Container consolidation and deconsolidation facilities • Container repair shops and services • Empty container depot	• Provided by a specialized operator. • As a rule, only one operator.	**CR** D
Customs and foreign trade services		
• Customs and customs-related services, in an integrated manner if possible • Where possible, a favourable tax regime.	• Provided by government departments. • Spaces normally provided by the LPDS.	**CR**
• Companies that provide foreign trade support services (customs agents, etc.)	• In the administration centre or service centre. • An open, competitive regime.	**CR**

They are aimed primarily at the users of the platform, but they may also be aimed at users in transit, visitors,…

Middle East and North Africa Transition Fund

European Investment Bank The EU bank

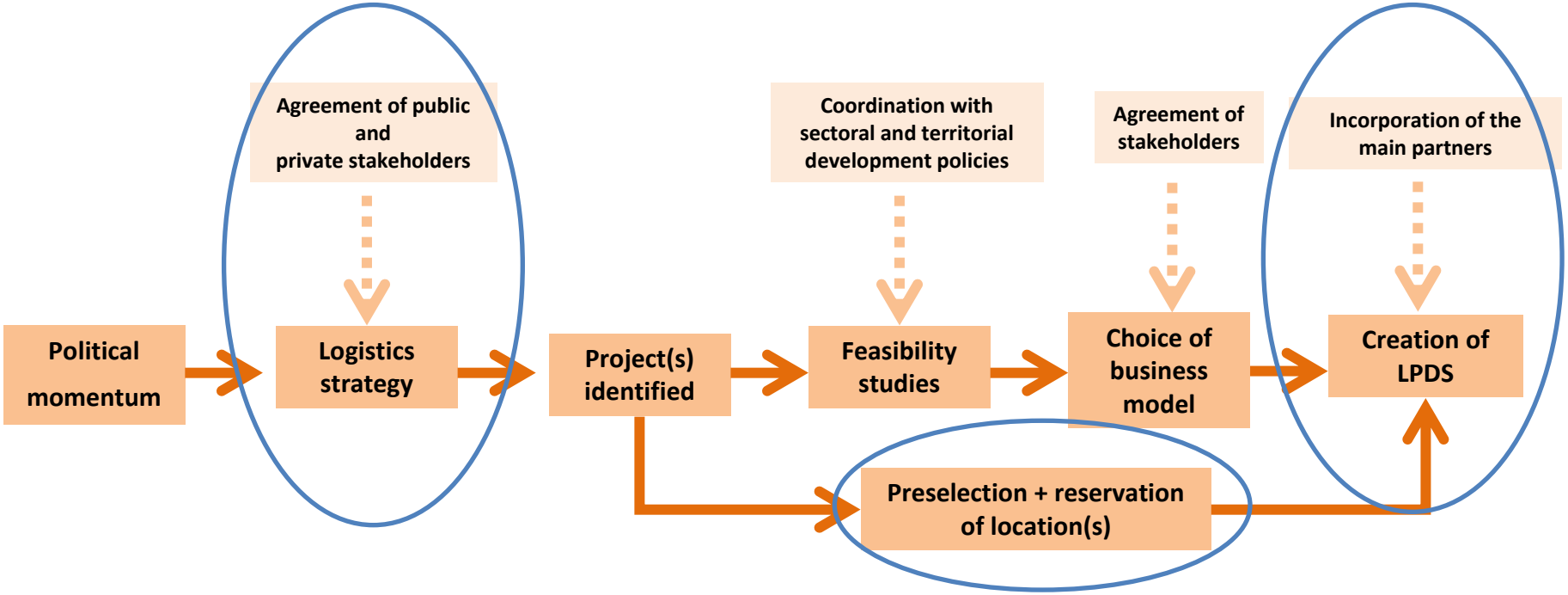
Cluster or value-added services

Service	Specific features and quality levels	Recommendations for providing them	Level of necessity
Strengthening of non-logistics value-added services			
• Centralization of purchases. • Exchange functions and management of human capital. • Practical consulting. • Security services as a cost reduction tool. • Promotion of environmental sustainability policies.	• Public initiative: in some cases, environmental policies. • Collaborative initiative. • Initiative of the LPDS of the LLPs.	• The LPDS should collaborate with the users and external public and private organizations.	CO
Contribution of measures to provide support and facilitate relationships with government departments			
• Simplification of administrative procedures. Single-window system. • Fiscal support relating to logistics and transport activities, primarily in a local context. • Measures to encourage interaction between the companies based in the platform and government departments.	• It is recommended, especially in top-level platforms.	• The LPDS should seek agreements with government departments and industry organizations.	CO
Framework of collaborative logistics initiatives			
• Pooling of services. • Collaborative cluster projects.	• Within this group, the initiative must always be collaborative, supported and facilitated by the LPDS of the LLPs.	• The LPDS should collaborate with the users and industry organizations.	CO
Other value-added services provided by clusters			
• Training. • Framework of logistics development initiatives and projects in the region or country.	• Involving national or regional governments.	• Agreements with government departments and industry organizations.	CO

"Soft" services that help promote platforms as a framework for establishing and concentrating companies.

4. A guide to the institutional models for implementing and managing the LLPs

Start-up phase



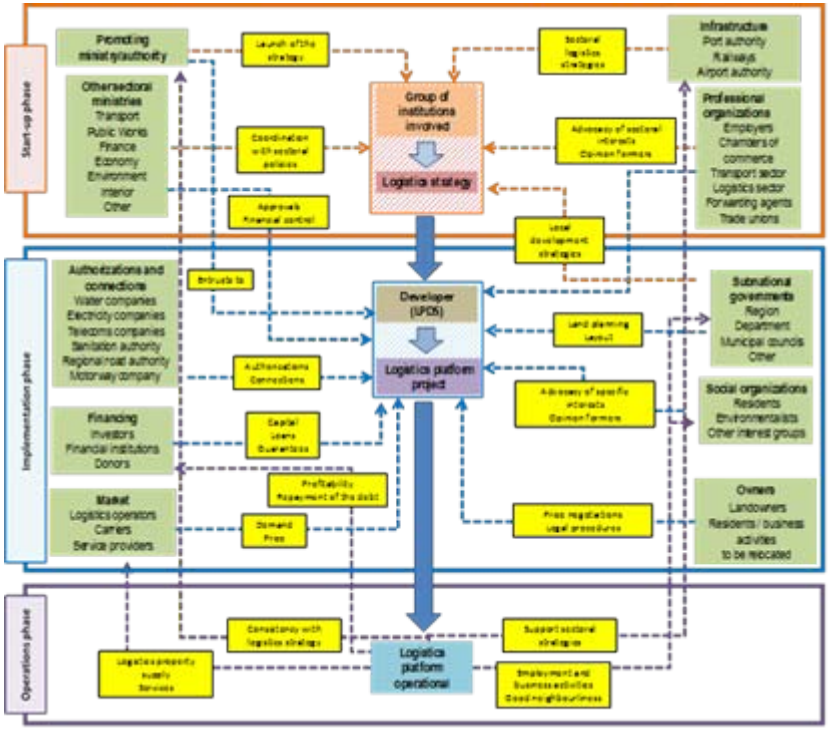
Key activities:

→ Agreement on the strategy .

→ Preselection and reservation of locations (without land there is no project).

→ Existence of an entity that is able to work on the project development.

Stakeholders throughout the project



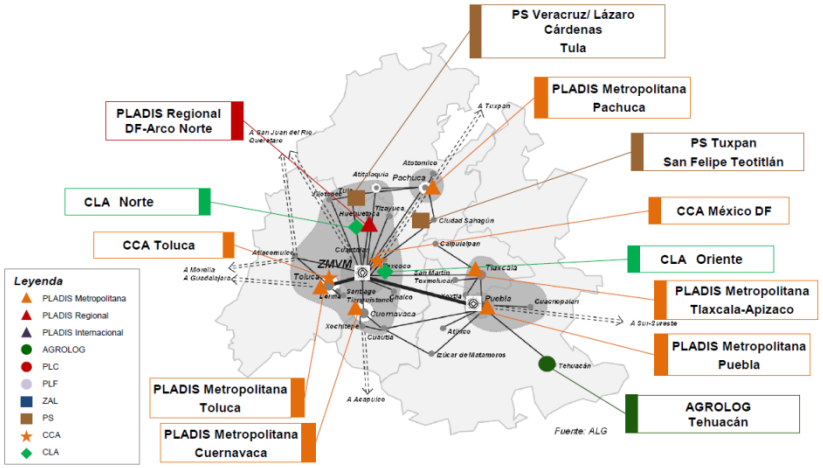
- The start-up and implementation of a logistics platform involve awareness, mobilisation and coordination of a large number of stakeholders.
- Each one will have their areas of intervention, priorities and resources.
- They have sometimes a poor understanding of logistics.

The key to a successful logistics platform project is :

- **Education to explain the project and create a sense of belonging.**
- **Diplomacy to manage the capabilities and expectations of the different stakeholders.**
- **An effective unit to implement it with clear political support.**

Criteria for the definition and preselection of projects

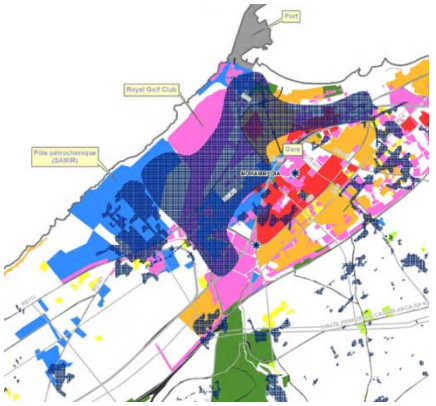
- **Public interest**: Bring benefits to all or most of the potential beneficiaries.
- **Opportunity**: Strengthen other projects and initiatives.
- **Added value**: Offer added value to improve the efficiency and competitiveness of supply chains and logistics operators.
- **Prefeasibility**: Be reasonably achievable.

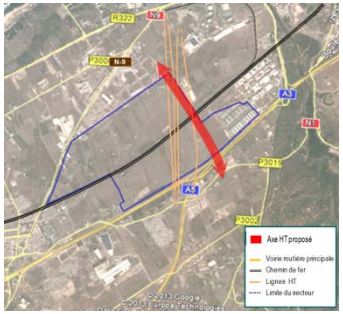


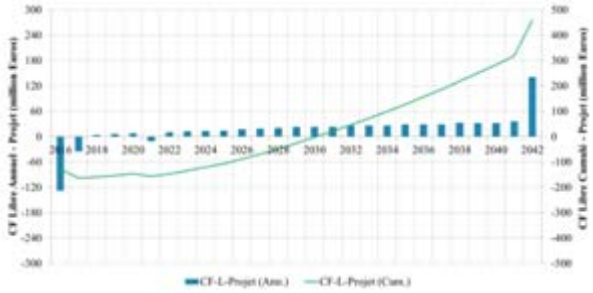
- **Availability**: Check the land and infrastructure required to make the planned project a reality are available at that moment or within a reasonable time frame.
- **Complementarity**: The proposed logistics platforms complement other measures to modernize and upgrade the national logistics sector.
- **Priority**: Evaluate the choice of priority logistics platforms in terms of the expected results and in terms of other projects or measures.

Components of feasibility studies

- The market study.
- The technical feasibility study and pre-project summary.
- The brief environmental and social impact assessment.
- The economic and financial study.
- The institutional framework study.







The outcome of feasibility studies not only indicates whether to continue or halt the project, but to determine the conditions under which the project may become feasible.

Public-private balance

The support and involvement of the public sector is fundamental for launching major projects.

The scale of investment required for major logistics projects and their complexity (in particular if heavy investments on infrastructures are needed) often requires mobilization of public and private resources.

Several models of public-private cooperation are possible. No particular models are advocated.

ZAL, Port of Barcelona (Spain). PPP, port initiative .

Distripark Botlek, Rotterdam (Netherlands), 100% public (Port).

Sogaris, Rungis (France). 100 % public, local initiative.

Center Point Joliet (EEUU). 100 % private. Public investment for preparation of the site.

CIM Interporto Novara (Italy). Joint venture with local and provincial authorities.

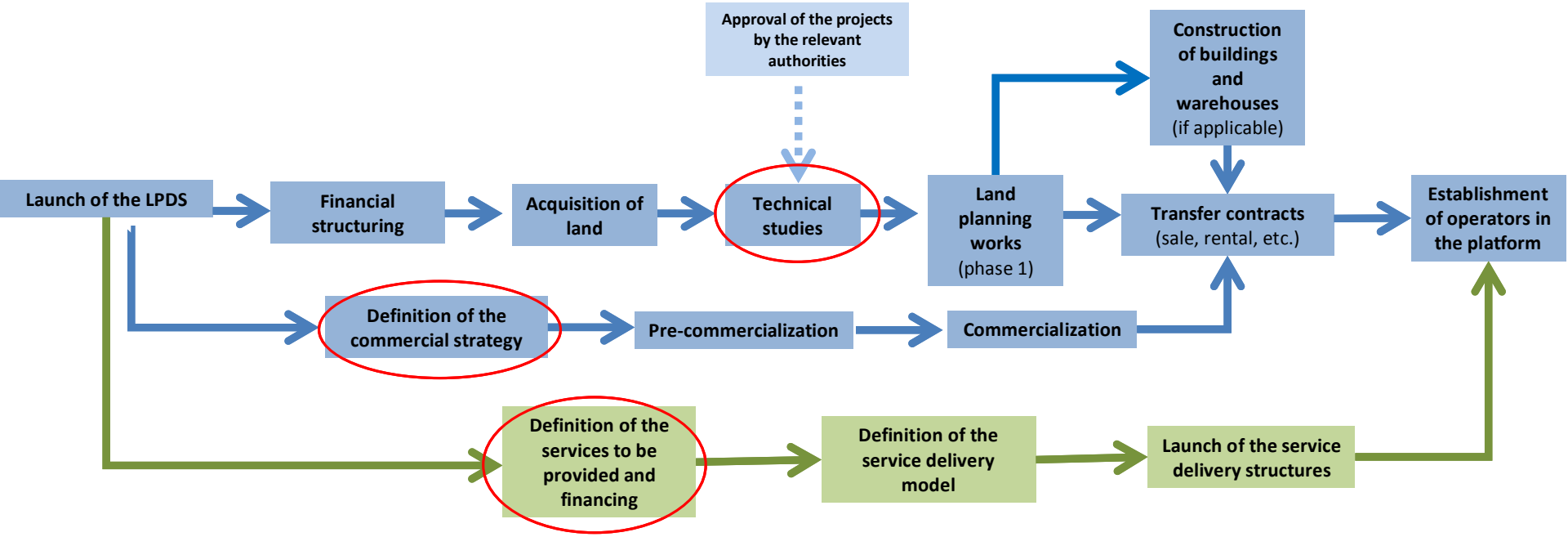
Bayernhafen Nuremberg (Germany), 100 % public to the Bavarian government.

Public-private balance

Recommendations for the public sector:

- To properly evaluate whether it has sufficient financial capacity to implement the project with the proposed model.
- To assess if government departments have the technical capacity required to directly manage the project and to regulate and monitor the activities of private partners in case of public-private collaborations.
- To ensure that public and private partners are on an equal footing to guarantee that the legitimate interests of both sides are treated in a balanced way.

Implementation phase



- A logistics platform is primarily a property project: developed plots, warehouses and premises.
- At the same time what distinguishes a logistics platform from a conventional industrial park are functional design (technical features) and services.
- Project must be feasible and attractive for companies.

Business model of the structure entity in charge of the logistics platform development (LPDS)

Logistics property function: to provide specialized areas and infrastructure for logistics and goods transport.

Main function.

It takes place within a competitive framework.

Principal source of revenues for the LPDS.

Promotional function: to ensure that platforms become hubs for promoting initiatives aimed at modernizing the logistics.

Complementary function.

Public service function.

Generate little revenues, sometimes expenses.

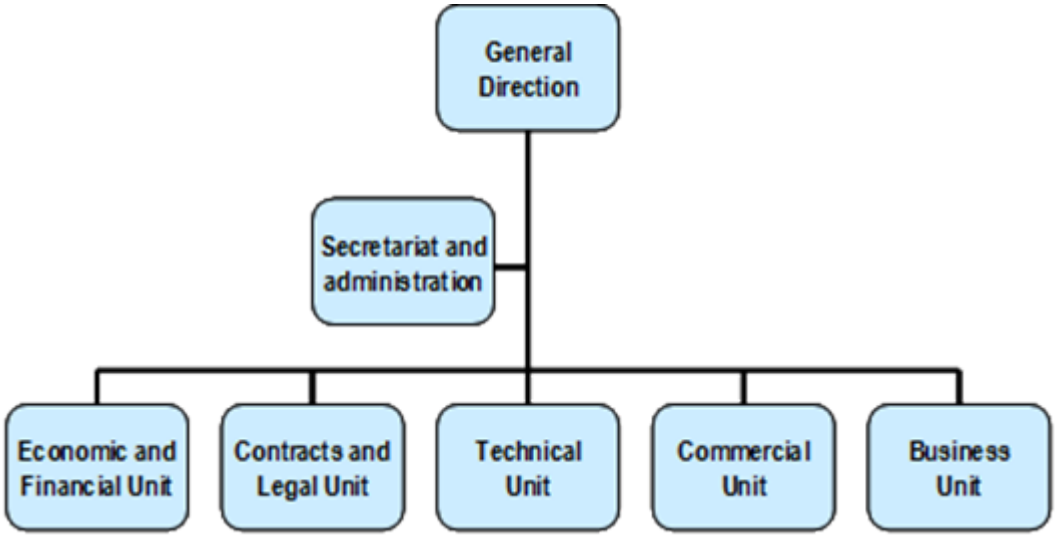
These two functions are different in nature, need personnel with different skills and have different impacts in the turnover.

A balance between the two functions must be achieved within the LPDS.

The logistics developer should create a hub of logistics expertise in its staff and ensure professional respect from sector operators.

Recommendations for the LPDS

- A flexible, professional and result-oriented.
- To establish a framework for good corporate governance.
- To establish a framework for coordination with public bodies which ensures that the project is consistent with the logistics strategy and overriding interests and avoids an excess of interference on operational decisions.



The expertise gained by the LPDS during the development of the first platform project can very often be used to tackle other logistics platform projects.

Acquisition of land and other land-related aspects

Land-related aspects have a huge impact on the project:

- Impact on costs.
- Impacts on the commercialization model.
- Impacts on project management.
- Impacts on the social acceptance of the project.

Planning and acting in advance are key issues to avoiding making the project unfeasible, whether due to high land prices or lack of available land.

Commercialization models and their implications

Sale

- Less funding required.
- A shorter pay-back period.
- Commercialization is a temporary activity.
- No recurring revenues over time.
- More exposure to fluctuations in the property market.
- The developer loses ownership of property assets → Once the plots/premises are sold, the promoter/administrator has less control over the activities and types of companies based in the platform.
- Less exposure to asset depreciation.

Temporary transfer

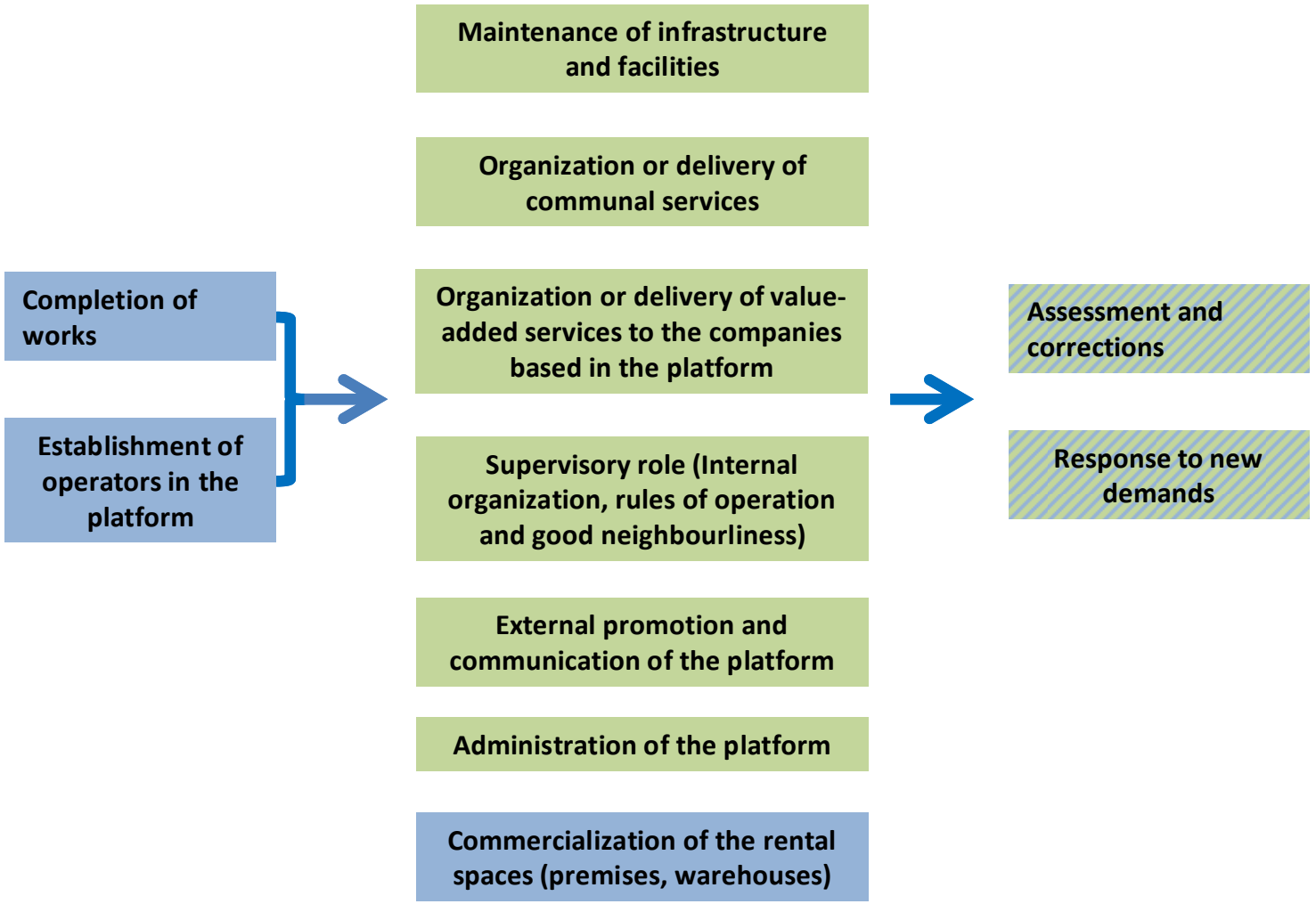
- More fixed assets → more long-term financing needs.
- A longer pay-back period.
- Commercialization activities become a permanent activity.
- source of stable income over time.
- Less exposure to fluctuations in the property market.
- The developer does not lose ownership of plots or fixed assets → more control over the activities and types of companies based in the platform.
- The developer retains responsibility for maintenance and repair of assets.

The construction of buildings, especially logistics warehouses, involves heavy investment that is not always available to public or semi-public logistics developers, even if "built to suit" agreements are increasingly in demand among major international logistics operators.

Recommendations for commercialization

- Where possible, combine sale and rental to respond to different types of operators, needs and procurement capacities.
- Developers retain the property of strategic spaces and/or those fairly unattractive to the private sector.
- Build some warehouses and sometimes the service centre at the start as a proactive way of attracting the interest of operators.
- Build some modular warehouses aimed at small operators as a proactive way of supporting the weakest segments of the logistics sector.
- Always ensure that business strategy does not overload the debt of the LPDS.
- Commercialization must be open to all companies and avoid unjustified special conditions.

Operations phase



Delivery model for services

- Provided directly by the LPDS with its own personnel.
- Provided by the LPDS through outsourcing.
- Provided indirectly by concessionaires under the monitoring of the LPDS.
- Provided by freely competing companies.

- **Ensure that service maintenance and delivery are feasible and their costs are acceptable for companies based in the platform.**
- **Flexibility to adapt to needs of companies based in the platform (e.g. user committees).**
- **Ensure service and quality standards (e.g. charter of commitments for the LPDS).**

Business model during the operational phase

Revenue

- Sale of plots, warehouses and premises
- Concession fees
- Rental of warehouses and premises
- Platform maintenance and administration fees
- Revenue from providing services to the companies in the platform
- Other property income
- Public sector contributions, grants and donations

Expenses

- Structural costs (personnel, fixed costs)
- Repayment of the debt
- Sinking fund for own assets
- Cost of maintaining communal infrastructure and facilities
- Cost of providing services to the companies in the platform
- Cost of activities to promote and stimulate the platform

Profit

- Equity retribution
- Reinvestment in other projects

- Platform must be financially sustainable over time.
- Ensure that reasons of its creation preserve its nature over years.

Environmental and social recommendations

- Promoting the employment of groups with fewer opportunities.
- Support services such as nursery schools, public transport and convenience shops.
- Promoting and offer places for training.
- Good neighbourliness with local public stakeholders and resident groups.
- Environmental programmes and initiatives (e.g. renewable energy, reducing and recycling waste, eco-efficient buildings, etc.).
- Safe driving programmes for carriers.

The most jobs are created by the companies based in the platform, not by the LPDS. An attractive platform to the companies is the greatest contribution of the LPDS to create jobs.

Middle East and North Africa Transition Fund

European Investment Bank The EU bank

Guidelines for the Implementation of the Euro-Mediterranean Logistics Platform Network (EMLPN)

Middle East and North Africa Transition Fund

European Investment Bank The EU bank

Why a Euro-Mediterranean Network of Logistics Platforms (EMLPN)?

Implementing logistics platforms is proving to be a challenging endeavour in the region (as it is in other countries).

Most of the reasons raised by CATRAM-Team Consultants study (2008) for the creation of a EMLPN remain valid but have been refined, integrating lessons from experience along this period and adapting them to recent developments in the region.

The key contribution of the EMLPN to LOGISMED's objectives is its potential for sharing and benchmarking experience, helping stakeholders in Mediterranean Partner Countries overcome the challenges and difficulties found so far to develop and operate logistics platforms.

The main motivation of the EMLPN would be to pool experiences to help developers and stakeholders implement and operate feasible, modern and efficient logistics platforms in the Euro-Mediterranean region.

Areas for sharing experience and disseminating best practice

Implementation-related aspects: lessons from past implementation experience, avoidance of pitfalls, preparation of business and implementation plans.

Technical aspects : technical standards and solutions: e.g. layout, planning, infrastructure and facilities, intermodal facilities, warehouses, etc.

Operational aspects: types of services to be provided, value added, acceptance from companies, business models, outsourcing, costs of services, etc.

Commercial aspects: approach to the different types of customers, lessons from successful (or failed) marketing initiatives, pricing strategies, relations with industry associations, and private developers, etc.

Institutional aspects: institutional models for platform development / operation; relationships between logistics platform developers / operators and other institutions at national, regional and local level, port authorities, infrastructure authorities, etc.

Promotion of advanced logistics policies: Contribution to incorporate advanced logistics trends and paradigms in the agenda of business and government stakeholders: e.g. trade facilitation, logistics outsourcing (3PL, 4PL), intermodality, “green logistics”, efficient urban freight distribution, reverse logistics, e-commerce.

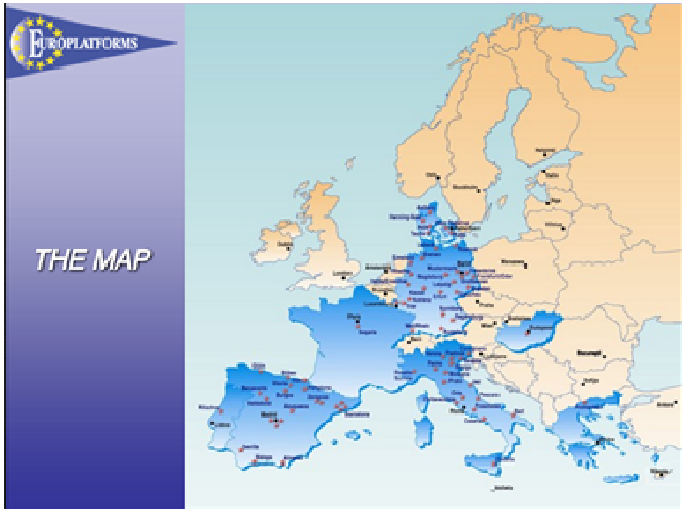
Assessment of possible functions and activities of the network

Type of activities	Examples	Relevance	Operational feasibility	Economic viability
Raising awareness on the role and contributions of LP	General marketing and institutional actions, lobbying.	▪ High-medium (4)	▪ High (5)	▪ High (5)
Exchange of experiences	Seminars, workshops, benchmarks, technical visits, documents and reports, exchanges, common website, input from experts, etc.	▪ High (5)	▪ High (5)	▪ Medium (3)
Representation vis-à-vis stakeholders	Representation at institutional meetings, forums and trade fairs.	▪ High (5)	▪ High (5)	▪ High-medium (4)
Standardization certification	Certification of logistics platforms and warehouses.	▪ Medium (3)	▪ Medium (3)	▪ Medium (3)
Promotion of improvements in logistics	Promotion of associated policies: logistics outsourcing (3PL, 4PL) intermodality, green logistics, urban logistics, reverse logistics, etc.	▪ High-medium (4)	▪ Medium (3)	▪ Medium-low (3)
Common services for members	Central purchasing unit, collaborative services.	▪ Medium-low (2)	▪ Low (1)	▪ Medium-low (2)
Investment and trade promotion	Exploring synergies between companies in the platform and other in their surroundings.	▪ Medium-low (2)	▪ Low (1)	▪ High-medium (4)

Key factors for success

Lessons from other international networks in related fields show that the key factors for a successful launching are:

- Identify a **central core of partners** willing to exercise **leadership**, especially during the initial stages.
- Start with a minimal **critical mass** of initial partners.
- Adopt a **flexible approach** to membership, willing to embrace partners with different characteristics.
- Create a **highly simplified organization**, especially during the start-up and consolidation stages.



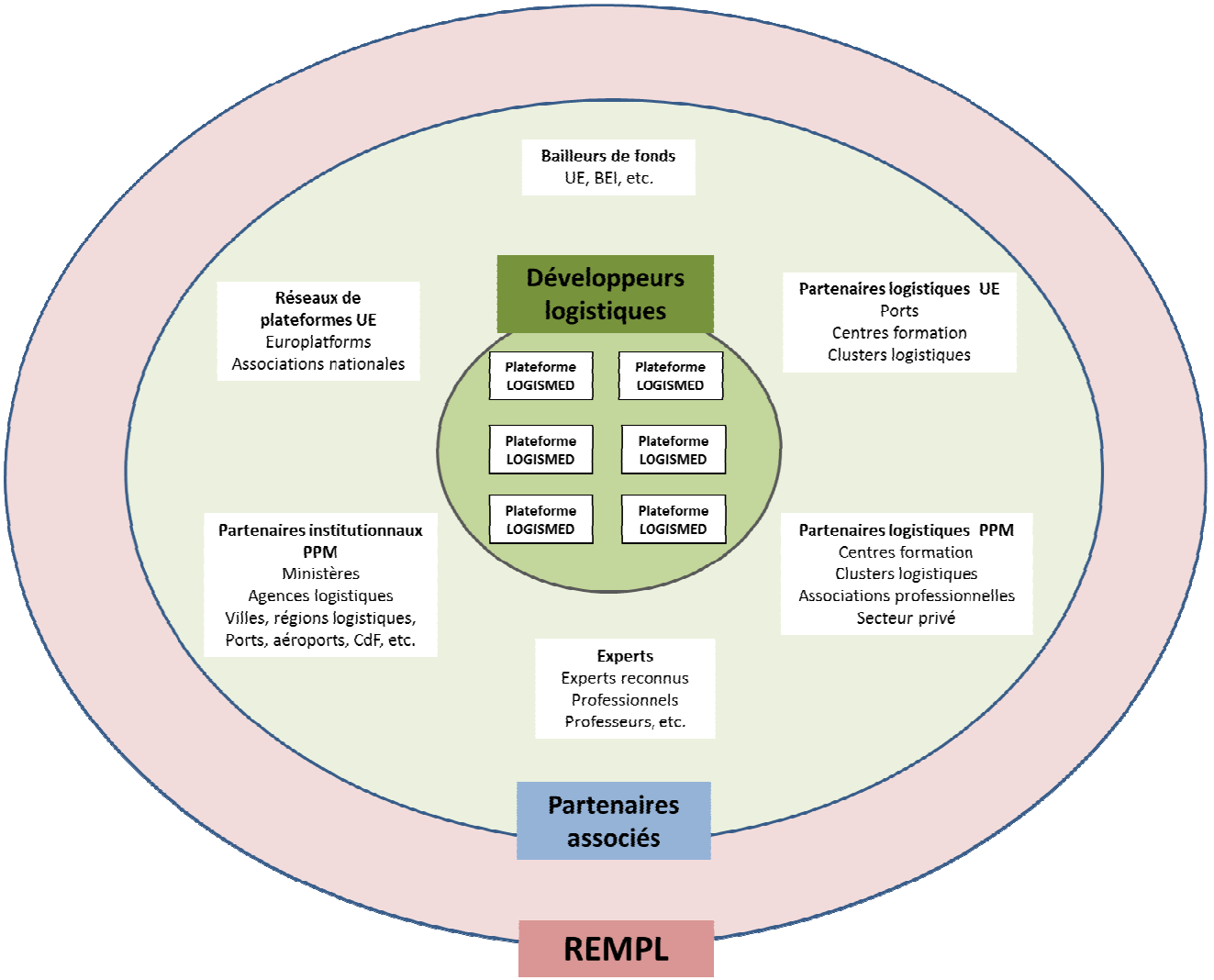
Strategic lines of the proposed network

a.Prioritize support for the implementation of projects, the main topic at present.

b.Put agencies / authorities involved in the development of logistics platforms at the centre of the EMLPN.

c.Create a flexible and scalable network that brings together most stakeholders and projects in the region.

Proposed structure of the network



Indicative list of potential members of the core of the EMLPN

Country	Stakeholder	Platform
Morocco	AMDL	Zenata
	SNTL	Zenata
	ONCF	Mita dry port
	Tanger-Med	Medhub
Algeria	SNTR-LOGITRANS	Rouïba, Oran, Skikda
	Port of Béjaïa	Ighil Ouberouak, Tixter
	SIL	Skikda, Annaba
Tunisia	Ministry of Transport	t.b.c.
	OMMP	Radès
Egypt	GALDP	6th of October City
	Suez Canal Economic Zone Authority	East Port Saïd
Jordan	Ministry of Transport	Aqaba
	Ministry of Transport	Madounah

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Potential associated partners

Contributions	Prospective partners
MPC institutional partners	
• Promotion of logistics strategies and projects. • They become the top-level contacts in the MPCs.	• Ministries, logistics agencies, logistics cities or regions. • Infrastructure operators (ports, airports, railways etc.).
MPC logistics partners	
• These are the operators, clients and beneficiaries of the LLPs.	• Professional associations, logistics training centres, logistics clusters, private sector
EU logistics platforms	
• Exchange of technical experience and expertise. • Study missions, seminars and training. • Possibility of stable partnership in the medium term.	• Europlatforms (European platform federation). • National networks of platforms. • Individual platform management entities.
EU logistics partners	
• Technical experience and expertise in advanced logistics. • Possibility of stable partnership in the medium term.	• Ports, logistics training centres, logistics clusters, other.
Donors	
• Consistency with broad policies in the region. • Contributions to political framework (e.g. EuroMed) • Advisory services • Financing of bankable investments	• EU, EIB, MENA Transition Fund, EBRD, World Bank, AfDB

Middle East and North Africa Transition Fund

European Investment Bank The EU bank

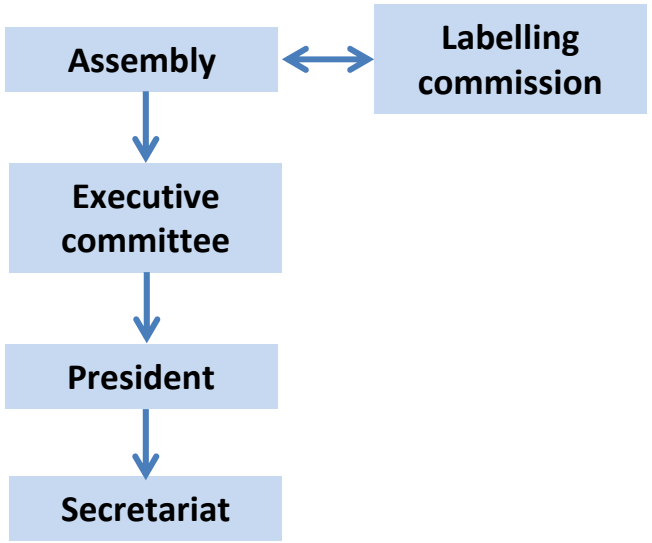
Labelling criteria

	Category	General criteria for all LLPs
1	**Geographic coverage**	• Mediterranean, national, regional, urban (main metropolitan areas) • Desirable: Substantial foreign trade component.
2	**Minimum area**	• Flexible. Recommended threshold of 30 ha gross area.
3	**Infrastructure**	• Road connection to high-capacity routes. • Connection to public utility networks.
4	**Development**	• Layout designed to facilitate logistics operations. • Internal water, energy, communications, sanitation, drainage, signalling, etc. • Desirable: green spaces, public spaces.
5	**Buildings**	• Storage buildings in line with international standards. • Desirable: storage areas for hazardous materials, container depot area.
6	**Environment and landscape integration**	• Wastewater treatment, collection and treatment of ordinary and special waste. • Desirable: Reuse of rainwater, renewable energy, urban landscaping, environmental charter.
7	**Services**	• Access control and security. • Maintenance of facilities, roads, green spaces, lighting, waste collection, etc. • Value-added services for companies, parking areas for heavy goods vehicles and trailers. • Desirable: Catering, transport, truck centre, handling equipment, training.
8	**Operator types targeted**	• Logistics operators. • Desirable: Foreign trade operators , intermodal services, handling services.
9	**Stakeholders involved**	• Agency with the capacities and resources to implement platform projects. • Desirable: other stakeholders involved, port, railways, customs, telecoms, airport, education.

Labelling procedures flexible so as to adapt to the different stages of projects and the different stages of the network's consolidation.

Governance model and start-up

- The most common status for similar entities is that of a **non-profit association**.
- However during the **start-up period** the EMLPN can operate as an informal network similar to other networks for cooperation or research programmes.
- Start-up phase envisaged to last between two and four years. After it, the network should have decided whether to create a formal structure or keep the same modus operandi.



- After start-up period, operating costs should be fully covered by member contributions.
- The most usual option in international networks is that it approves or refuses applications to join. A labelling commission within the network with independent players may facilitate objective assessment. A fast-track procedure for joining in the start-up period could be used: e.g. signing a “Letter of Engagement”.
- Headquarters of the association: need to prioritize operational and practical factors.

Estimation of costs for various models

Assessed models	Cost per year
Model 1: Secretariat (secretary + administrative support) employed on a full-time basis	121.000 €
Model 2: Secretariat (secretary + administrative support) employed on a part-time basis	84.700 €
Model 3: Recruitment of a secretary with administrative support from an existing entity	88.000 €
Model 4: Secretariat (secretary + administrative support) supplied by an existing entity	71.500 €
Model 5: Unpaid secretary with administrative support from an existing entity	51.500 €

- **Models 3 or 4 seem the most appropriate for rapid and economical start-up of the network.**
- **Model 5 could also be possible but full engagement and no conflict of interests of non-paid secretary should be assured**
- **Over time, these models can evolve towards model 2, or eventually towards model 1**

Proposed roadmap for implementation

Activity	Stakeholders involved	Deadline	Result to be achieved
Formulation and validation of the model	Countries	2nd half 2016	The model is adopted by a substantial number of stakeholders in the Logismed steering committee.
Awareness visits	CETMO, EIB	1st half 2017	Engagement of most of the target stakeholders.
Network launching conference	Countries CETMO, EIB	1st half 2017	Organization of the launch conference. Central core of participants take the lead
Preparations for operationalization	Countries CETMO, EIB	2nd half 2017	Consensus on model, location, secretariat and funding.
Network operationalization	Countries CETMO, EIB	2nd half 2017	Constitution, appointment of the president and governance bodies. Existence of headquarters / operational office.
Preparation of the final legal status	Countries	2017 – 2021	Legal status agreed and formal approvals cleared.
Formal establishment as a legal entity.	Countries	2021	Network constitution assembly. Formal election of the governing bodies.

Ammann Nov 15 2016

Questions for discussion

1. Do you endorse the idea of creating a Euro-Mediterranean Logistics Platforms Network?

2. Do you agree on the main objectives and activities proposed for the network?

3. Do you endorse the general approach proposed with a core group of entities involved in the development/operations of logistics platforms and a number of associate members representing other stakeholders engaged in the modernisation of logistics?

4. Do you agree in broad terms with the governance model proposed?

5. Do you agree that in the context of LOGISMED Soft, EIB/CETMO initiate steps with country representatives and/or prospective members so as to raise awareness and start preparatory arrangements for the launch of the network?

6. Could you identify the contact person/Institution that could liaise with CETMO and lead the preparatory arrangements in your country?

7. Could you identify the prospective members of the network in your country (core group and associate members) that could participate in the launching period?

8. What are the main hindrances/pitfalls that you anticipate for launching the EMLPN?

EUROPLATFORMS. E.E.I.G European Economic Interest Grouping

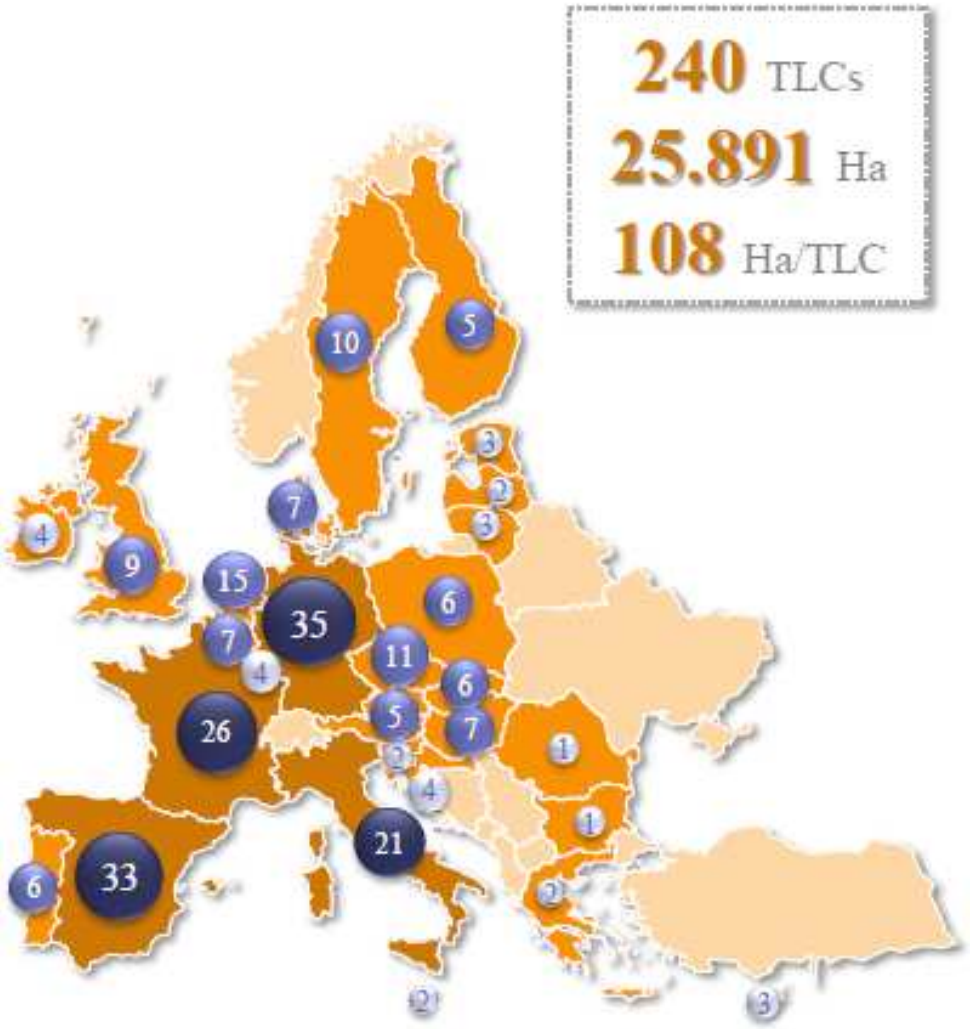
LOGISMED

Barcelona

September 2016

who we are

Federation: joining together national Logistic Platform associations in the European frame.



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main objetive

Represent and defend the European Logistic Platforms' interests in the European Institutions

EUROPLATFORMS

europlatforms members

A.C.T.E.
Asociación de Centros de Transporte de España

FDT

Unione Interporti Riuniti

E.E.ΣΥ.Μ

TVT TERMINAL MULTIMODAL DO VALE DO TEJO S.A.

LIMOWA

DGG
Deutsche GVZ-Gesellschaft mbH

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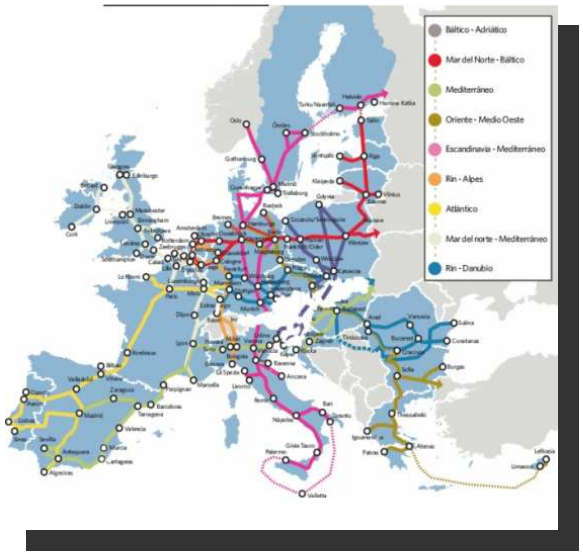
europlatforms representation

90 European Logistic Platforms

Three of the four countries with more numbers of logistic platforms are members of Europlatforms (Italy, Spain, Germany)

Proportionality north-South.

All the European Freight Corridors are represented



why europlatforms has been created

Decisions come from European Institutions

Money in Europe

Lobbies have become settled in Brussels

If you are not in Brussels you don't exist

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european polities priorities

- TEN-T Corridors
- Environmental Impact
- Multimodality
- Intelligent transport Systems
- Urban Nodes
- Connection with 3er Countries

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european polities & logistic platforms

TEN-T Corridors

- We provide similar services along the European Corridors.
- LP are a «perfect link» for the European Corridors.
- LP feed the Corridors and improve the control of goods and documentation.

Multimodality

- Most of the time, LP have been the instrument used to develop multimodality.
- There is no sense talking about multimodality and avoiding the role of the logistic platforms.

Envionmental Impact

- Reducing the transit time, increasing the cargo security, expediting customs formalities and administrative issues, and taking advantage of the synergy created as a result of the concentration of services and companies.
- There is a general administration who entirely manage the logistic platforms.

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european polities & logistic platforms

Intelligent transport Systems

- Cargo follows two routes: the physical cargo and the documentation. In some places these two routes should be coordinated in order to check them. Logistics platforms is a good place to coordinate this. This would result in both improved security and traceability.
- Working on R&I and ITS in order to achieve a more efficient freight transport services, reducing the transit-time, "last mile", etc.

Urban Nodes

- In order to organize the urban freight mobility, logistic platforms which are placed close to cities could make a valuable contribution in organizing the Urban Logistic.

Connection with 3er Countries

- "European Logistic Network" could be extending easily to others countries. It is a win-win relation. We need to extend our influence out of Europe and 3er Countries could take advantage of our knowledge.

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we must focus on

We are logistic platforms, not a "real-estate speculators"

Identifying what a logistic platform is and what it is not. (Input control, 24 hours security, warehouses, general services, garages, fuel stations, etc.).

Classifying the different types of Logistic Platforms (traffic, multimodality, quality of services, etc.).

- 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

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Thank you very much for your attention

3RD WORLD FORUM: CITIES AND LOGISTICS PLATFORMS

Seville, Spain

30th NOVEMBER,1st & 2nd DECEMBER 2016

http://worldforum.omcpl.org/

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