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Introduction & Objectives

- Introduce moderators & ELUPEG
- Hear from two current EU projects
  - **FREIGHTWISE** (framework architecture, internet for freight). Freightwise plays a key role in relation to the EU Commission's Freight Logistics Action Plan and is the basis for eFreight communication architecture-- DG TREN
  - **EURIDICE** (data acquisition, data analyses,)--DG INFSO
- Share a vision of **"What could be"**
- Facilitate an interactive discussion of the commercial imperatives & opportunities of an e-Freight Roadmap (Break out groups)

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Introduction and objectives of workshop

The commercial conditions and opportunities of eFreight

***e*-Freight** denotes the vision of a paper-free, electronic flow of information associating the physical flow of goods with a paperless trail built by information and communication technologies

It includes the ability to track and trace freight along its journey across transport modes and to automate the exchange of content-related data for regulatory or commercial purposes.

Standard interfaces within the various transport modes needs putting in place so that interoperability across modes is assured, e.g. a standard data set to describe freight including regulatory requirements and standardisation for electronic descriptions of services offered by freight transport operators.

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"Creating an e-Freight Roadmap for Freight Transport Logistics",

Moderators- Professor Alan Waller & Brian Bolam
ELUPEG™Limited

17 February 2009- Brussels

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The commercial conditions and opportunities of e-Freight

- Consensus is needed on open, robust data architecture for business-to-administration and administration-to-administration data and information flows
- Logistics operations involve a range of different actors: suppliers, customers, freight forwarders, transport operators, infrastructure managers and the public authorities and are the principle area of application for information and communication technologies.
- Improving the flow of information across logistics processes will make these more efficient, can help capacity planning and reduce congestion.
- It can encourage customer trust in multi-modal operations through enhanced, real-time monitoring capabilities.
- Finally, it can help implement an integrated approach to supply chain security.

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"Creating an e-Freight Roadmap for Freight Transport Logistics",

"Freightwise"

Jan Tore Pedersen

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"Creating an e-Freight Roadmap for Freight Transport Logistics",

“Euridice”

Paolo Paganelli

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"Creating an e-Freight Roadmap for Freight Transport Logistics",

Background & Statistics

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Quarterly Road Freight 2002-2007

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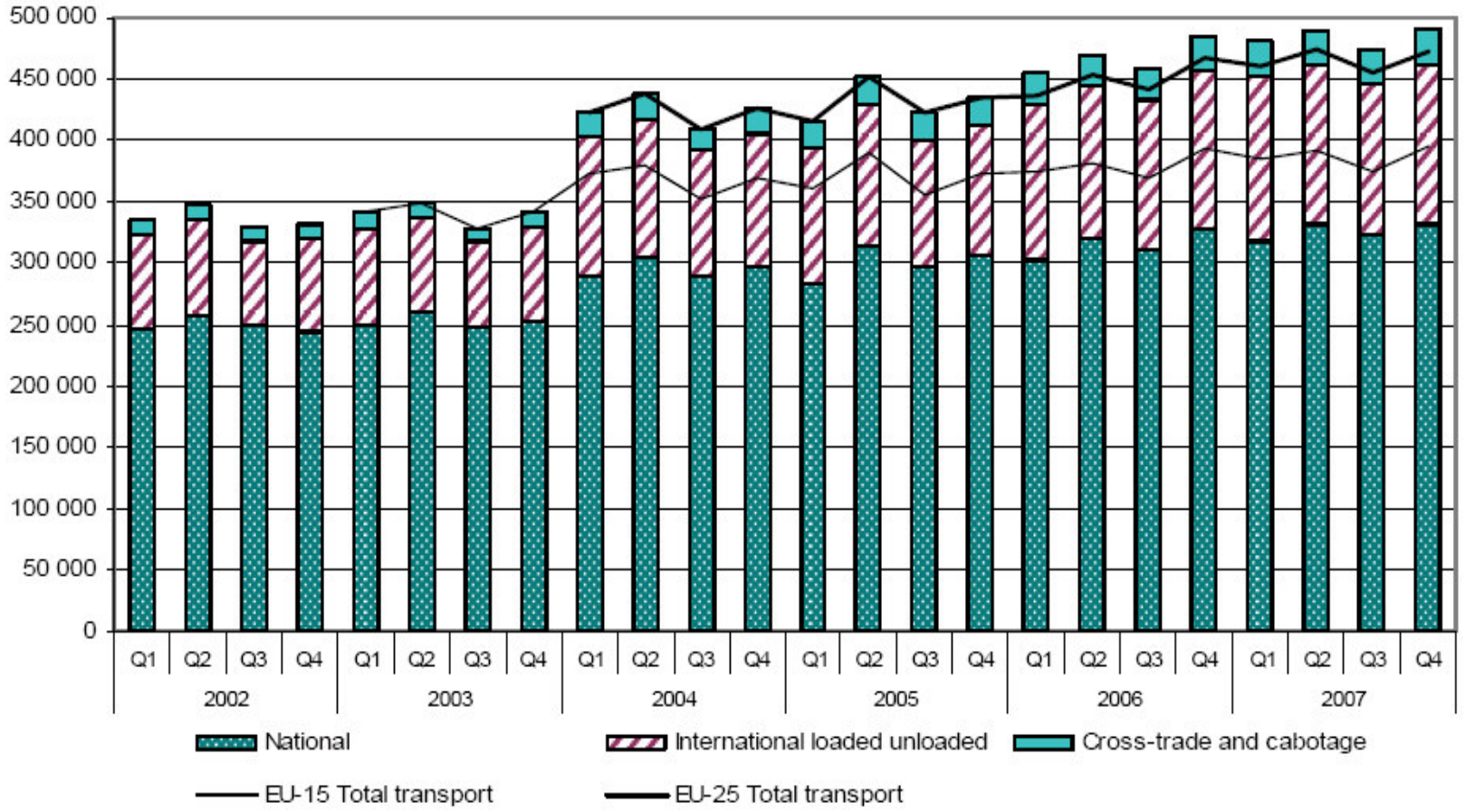
Figure 1: Quarterly road freight transport, 2002-2007 - million tkm



EU Ton/Km 2006/7

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Table 1: National, international loaded and unloaded, cross-trade and cabotage transport in 2006 and 2007 - million tkm and percentage change

	2006					2007					Chage 2006-2007 (%)				
	National	International	Cross-trade	Cabotage	Total	National	International	Cross-trade	Cabotage	Total	National	International	Cross-trade	Cabotage	Total
BE	19 615	18 974	2 877	1 552	43 018	19 650	18 090	2 815	1 529	42 084	0.2	-4.7	-2.2	-1.5	-2.2
BG	5 806	6 368	1 387	204	13 765	5 890	6 834	**1 822**	**78**	14 624	1.4	7.3	31.4	-61.8	6.2
CZ	16 082	25 475	8 733	86	50 376	15 831	23 849	8 214	248	48 142	-1.6	-6.4	-5.9	188.4	-4.4
DK	11 495	9 151	370	239	21 255	11 800	8 468	400	293	20 961	2.7	-7.5	8.1	22.6	-1.4
DE	251 379	67 671	8 693	2 273	330 016	261 440	70 717	8 743	2 546	343 446	4.0	4.5	0.6	12.0	4.1
EE	1 979	2 869	598	102	5 548	1 942	3 558	754	163	6 417	-1.9	24.0	26.1	59.8	15.7
IE	13 832	2 624	564	434	17 454	14 428	3 731	443	418	19 020	4.3	42.2	-21.5	-3.7	9.0
EL	26 137	7 680	96	89	34 002	21 729	5 895	102	65	27 791	-16.9	-23.2	6.3	-27.0	-18.3
ES	174 588	64 465	1 882	854	241 789	190 611	65 547	1 892	825	258 875	9.2	1.7	0.5	-3.4	7.1
FR	182 753	27 440	729	523	211 445	191 388	26 478	777	569	219 212	4.7	-3.5	6.6	8.8	3.7
IT *	*160 000*	*30 000*	*800*	*1 100*	*191 900*	*160 000*	*30 000*	*800*	*1 100*	*191 900*	:	:	:	:	:
CY	1 145	20	-	-	1 165	1 184	17	-	-	1 201	3.4	-15.0	-	-	3.1
LV	2 718	5 459	2 547	30	10 754	3 006	6 644	3 514	39	13 203	10.6	21.7	38.0	30.0	22.8
LT	2 232	8 917	6 920	66	18 135	2 704	9 465	8 041	69	20 279	21.1	6.1	16.2	4.5	11.8
LU	544	2 522	3 608	2 133	8 807	548	2 638	4 129	2 248	9 563	0.7	4.6	14.4	5.4	8.6
HU	12 425	14 019	3 954	80	30 478	13 186	15 897	6 597	126	35 806	6.1	13.4	66.8	57.5	17.5
NL	31 009	41 001	9 012	2 172	83 194	30 686	37 830	7 407	1 999	77 922	-1.0	-7.7	-17.8	-8.0	-6.3
AT	14 437	18 254	5 780	717	39 188	14 744	17 172	4 800	686	37 402	2.1	-5.9	-17.0	-4.3	-4.6
PL	59 420	50 198	17 425	1 273	128 316	65 769	62 424	21 589	1 098	150 880	10.7	24.4	23.9	-13.7	17.6
PT	17 540	22 945	3 636	714	44 835	18 319	23 368	3 589	927	46 203	4.4	1.8	-1.3	29.8	3.1
RO	22 723	34 406	144	14	57 287	23 932	35 479	51	61	59 523	5.3	3.1	-64.6	335.7	3.9
SI	2 279	7 189	2 380	264	12 112	2 573	7 608	3 303	250	13 734	12.9	5.8	38.8	-5.3	13.4
SK	5 203	10 230	6 654	125	22 212	5 617	13 085	8 241	216	27 159	8.0	27.9	23.9	72.8	22.3
FI	25 465	4 052	110	88	29 715	25 956	3 624	84	147	29 811	1.9	-10.6	-23.6	67.0	0.3
SE	35 474	3 776	503	164	39 917	36 395	3 563	430	152	40 540	2.6	-5.6	-14.5	-7.3	1.6
UK	154 473	11 063	170	230	165 936	160 425	10 574	194	285	171 478	3.9	-4.4	14.1	23.9	3.3
EU-25	*1 222 224*	*455 994*	*88 041*	*15 308*	*1 781 567*	*1 269 931*	*470 242*	*96 858*	*15 998*	*1 853 029*	3.9	3.1	10.0	4.5	4.0
EU-27	*1 250 753*	*496 768*	*89 572*	*15 526*	*1 852 619*	*1 299 753*	*512 555*	*98 731*	*16 137*	*1 927 176*	3.9	3.2	10.2	3.9	4.0
LI	:	80	241	18	339	:	80	235	23	338	:	0.0	-2.5	27.8	-0.3
NO	15 310	4 025	33	19	19 387	15 427	3 869	37	42	19 375	0.8	-3.9	12.1	121.1	-0.1

National Transport 1999/2007

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Table 2: National transport - million tkm

	1999	2000	2001	2002	2003	2004	2005	2006	2007
BE	15 758	19 754	20 565	20 392	19 584	19 416	19 283	19 615	19 650
BG	:	:	:	:	:	:	:	5 806	5 890
CZ	:	**15 986**	**16 082**	**17 411**	17 362	16 046	15 518	16 082	15 831
DK	10 421	11 000	10 887	11 057	11 012	10 538	11 058	11 495	11 800
DE	226 887	226 529	230 016	225 474	227 205	232 303	237 617	251 379	261 440
EE	:	:	:	:	1 568	1 478	1 847	1 979	1 942
IE	7 737	8 337	9 122	10 731	11 935	13 216	13 983	13 832	14 428
EL	:	:	:	:	15 276	31 745	19 610	26 137	21 729
ES	98 134	106 936	114 004	129 510	138 413	155 014	166 386	174 588	190 611
FR	159 026	163 163	168 572	169 742	170 896	179 183	177 331	182 753	191 388
IT*	151 967	158 250	154 749	160 082	143 184	158 172	171 587	*160 000*	*160 000*
CY	:	:	:	1 286	1 370	1 102	1 374	1 145	1 184
LV	:	:	:	1 967	2 365	2 380	2 734	2 718	3 006
LT	:	:	:	:	1 958	2 213	2 137	2 232	2 704
LU	377	415	487	583	565	549	494	544	548
HU	:	:	11 835	11 166	10 670	10 977	11 394	12 425	13 186
NL	32 682	31 538	31 000	30 257	31 785	33 938	31 827	31 009	30 686
AT	12 280	12 389	12 454	12 663	13 036	12 376	12 514	14 437	14 744
PL	:	:	:	:	:	58 825	60 940	59 420	65 769
PT	14 309	14 220	16 351	14 916	14 199	17 435	17 445	17 540	18 319
RO	:	:	:	:	:	:	:	22 723	23 932
SI	:	:	1 927	1 945	1 995	2 267	2 361	2 279	2 573
SK	:	:	:	:	5 204	5 422	5 621	5 203	5 617
FI	25 806	27 717	26 678	28 071	26 896	27 331	27 815	25 465	25 956
SE	30 422	31 451	29 967	31 836	31 467	32 691	34 701	35 474	36 395
UK	149 019	150 337	149 760	150 920	153 933	154 157	154 396	154 473	160 425
EU-25	:	:	:	:	:	1 178 774	1 199 973	*1 222 224*	*1 269 931*
EU-27	:	:	:	:	:	:	:	*1 250 753*	*1 299 753*
NO	11 742	12 114	12 392	12 721	13 522	14 453	15 352	15 310	15 427
LI	:	:	:	:	:	:	:	:	:

** IT: 2006 and 2007 data have been estimated by Eurostat; UK: 2005 data under revision.*

International Transport 2006/7

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Table 3: International transport loaded and unloaded - million tkm

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2007** - share in total		
										International intra-EU27	CC and EFTA	Other international
BE	17 250	25 320	26 501	25 160	23 867	22 113	19 555	18 974	18 090	98.9%	1.1%	0.0%
BG	:	:	:	:	:	:	:	6 368	6 834	86.2%	5.7%	8.1%
CZ	:	20 528	**22 202**	**23 946**	26 025	25 620	21 810	25 475	23 849	95.3%	2.6%	2.1%
DK	12 276	12 166	10 510	10 895	11 208	11 763	11 643	9 151	8 468	86.7%	13.2%	0.1%
DE	45 652	48 684	52 150	52 174	56 068	62 938	62 545	67 671	70 717	94.0%	5.7%	0.3%
EE	:	:	:	:	2 215	3 424	3 122	2 869	3 558	72.5%	2.6%	24.9%
IE	1 699	2 650	2 295	2 680	2 927	3 069	3 017	2 624	3 731	99.6%	0.4%	0.0%
EL	:	:	:	:	3 973	4 924	4 050	7 680	5 895	97.6%	0.7%	1.7%
ES	35 066	40 472	45 323	52 353	51 515	62 707	63 662	64 465	65 547	98.8%	0.8%	0.4%
FR	41 975	37 863	35 917	32 673	31 316	31 334	26 745	27 440	26 478	96.9%	3.0%	0.1%
IT*	24 465	25 742	30 553	31 400	29 510	36 861	37 871	*30 000*	*30 000*	95.7%	3.1%	1.2%
CY	:	:	:	37	30	17	19	20	17	100.0%	0.0%	0.0%
LV	:	:	:	3 142	3 360	3 809	3 839	5 459	6 644	74.1%	3.1%	22.8%
LT	:	:	:	:	6 295	6 656	7 700	8 917	9 465	77.9%	2.2%	19.9%
LU	1 461	1 529	2 009	2 358	2 487	2 460	2 412	2 522	2 638	98.7%	1.3%	0.0%
HU	:	:	6 324	6 298	7 086	8 210	11 237	14 019	15 897	96.4%	1.8%	1.7%
NL	41 005	37 876	37 470	36 782	37 517	42 138	40 788	41 001	37 830	96.4%	3.2%	0.4%
AT	15 653	16 712	18 623	19 002	19 777	19 915	17 802	18 254	17 172	96.5%	3.3%	0.2%
PL	:	:	:	:	:	38 495	39 588	50 198	62 424	92.3%	2.0%	5.6%
PT	10 990	11 792	12 135	12 870	11 212	19 278	20 701	22 945	23 368	98.7%	1.2%	0.1%
RO	:	:	:	:	:	:	:	34 406	35 479	98.3%	1.6%	0.1%
SI	:	:	4 399	3 989	4 289	5 348	6 400	7 189	7 608	88.7%	4.1%	7.2%
SK	:	:	:	:	8 816	8 994	11 043	10 230	13 085	95.8%	1.1%	3.2%
FI	3 712	3 977	3 671	3 708	3 907	4 806	3 909	4 052	3 624	70.5%	8.1%	21.4%
SE	2 721	3 732	3 681	4 080	4 294	3 666	3 193	3 776	3 563	56.5%	43.2%	0.3%
UK	16 905	14 951	13 208	12 816	12 873	13 246	12 608	11 063	10 574	95.9%	2.4%	1.7%
EU-25	:	:	:	:	:	441 791	435 259	*455 994*	*470 242*	94.3%	3.2%	2.5%
EU-27	:	:	:	:	:	:	:	*496 768*	*512 555*	94.5%	3.1%	2.4%
LI	:	:	:	:	:	:	86	80	80	100.0%	0.0%	0.0%
NO	3 074	2 953	2 722	2 652	2 971	2 951	2 852	4 025	3 869	98.4%	0.6%	1.0%

** IT 2006 and 2007 data have been estimated by Eurostat; ** IT: 2005 data; UK: 2005 data under revision.*

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"Creating an e-Freight Roadmap for Freight Transport Logistics",

An Introduction to ELUPEG

Professor Alan Waller O.B.E.- Chairman ELUPEG

17 February 2009- Brussels

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ELUPEG Mission and Objectives

- "To be the catalyst and provide the forum, environment and access to tools to facilitate Pan European supply chain collaboration".
- "We aim for all supply chain stake holders to generate greater collective commercial, economic and social benefit than ever previously imagined, by identifying and acting upon opportunities to work together more easily and more effectively."

ELUPEG Progress
Established Working Groups

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- High Tech / Electronics
- Automotive-Inbound/Aftermarket/Finished Vehicles
- CPG / FMCG
- Roadmap for Collaboration
- Chemical / Industrial
- Returns and Recycling
- Bulk/Block Trains
- Intertrade Ireland
- Russia
- Carbon Footprint

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ELUPEG Code of Conduct

- No selling – (but it might happen).
- No criticism of competitors.
- No breach of confidence.
- Open discussion.
- Be constructive.
- Promote the group.
- Share learning.
- Network with other networks.
- Ensure fair play.
- Get results – Win / Win / Win.

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ELUPEG Contacts

Steering Board

- **Chairman-Alan Waller**
- **Secretariat**-Caren Tomkins (Bisham Consulting)
- Derek Bell (Bisham Consulting)
- Brian Bolam (OmPrompt)
- Malcolm Pope (Premier Foods)
- Peter Surtees (Kimberly Clark)
- Buddug Williams (Legal)
- Tim Bett (Bisham Consulting)
- James Dinsdale (CHEP)
- **Website – www.elupeg.com**

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"Creating an e-Freight Roadmap for Freight Transport Logistics",

A Vision of a Technology Enabled European Freight Network

Brian Bolam-Director ELUPEG

17 February 2009- Brussels

A Vision of "What Could Be"

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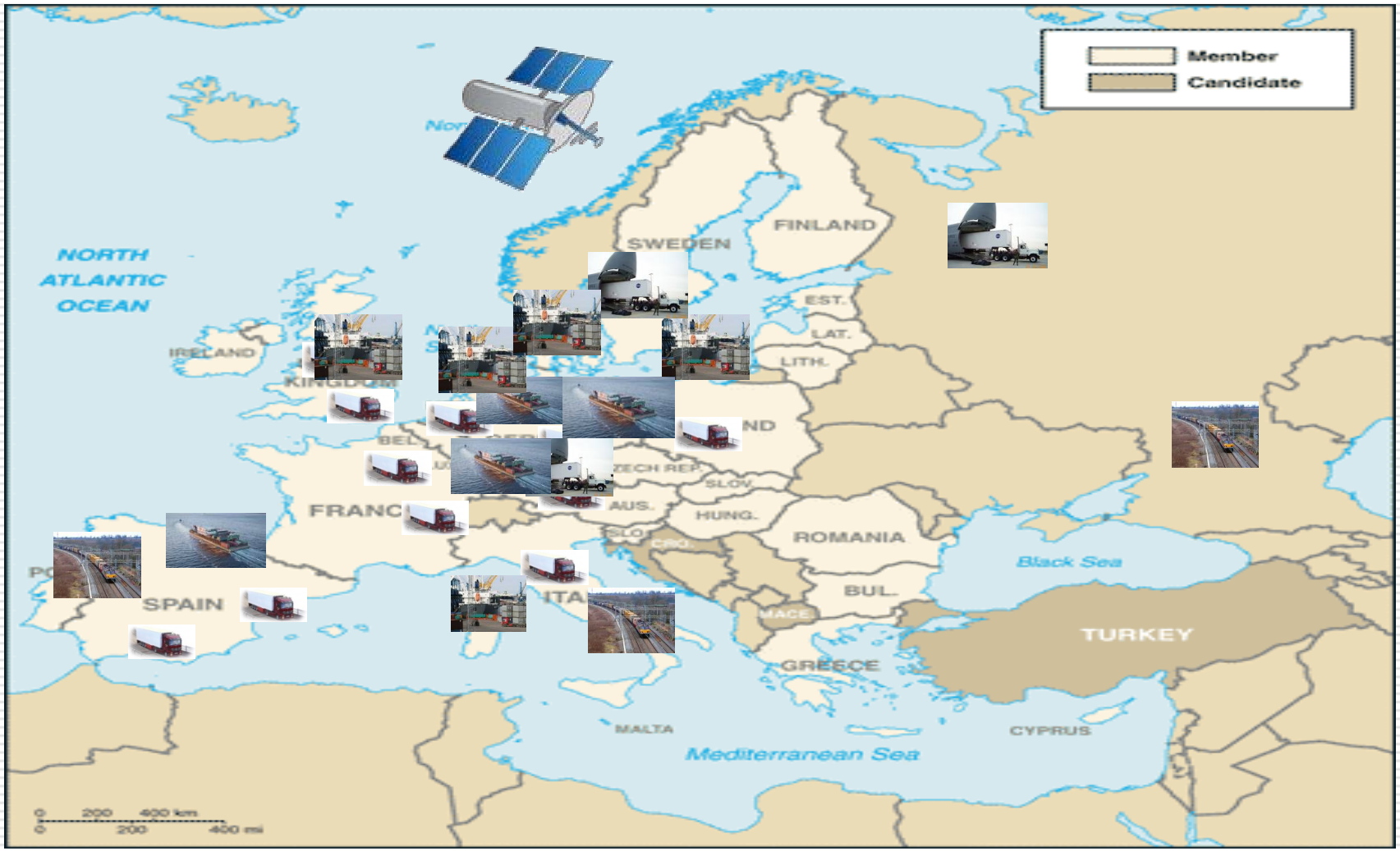

A Vision of "What Could Be"
E-Freight Europe

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- Intermodal Exchange
- Connectivity Platform
- Port/Nodes/Intermodal
- Real Time Visibility
- Asset Pooling
- Traffic Status reporting

A Vision of "What Could Be"

TRANSNET-EURO

- Data Interchange
- Freight Exchange
- Real Time Visibility
- Mega-Truck stops
- 12 Nodes
- 24/7/365 Ops*
- Clean City Trucks
- Hotels
- Fuel
- Trailer pool(s)
- Pallet Exchange(s)
- Maintenance
- Secure parking
- Transhipment
- X Docking

* Where allowed

A Vision of "What Could Be"

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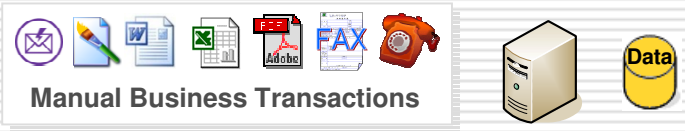
- **Freight Exchange**

- **Connectivity platform**



- **Asset Tracking**

30% Improvement (reduction) in empty running = 26M tonnes CO2

Workshop 1 Working Groups

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- Group A- Professor Alan Waller
  - What are the principal barriers to an integrated E-Freight network? (& how can they be overcome).
- Group B- Brian Bolam
  - Why should European Freight Logistics Stakeholders proactively support an E-Freight Network?
- Group C- Peter Klein
  - What are the commercial implications of adopting an E-Freight Network for Shippers & Logistics Services Companies (respectively)?

Group D – Graham Ewer

- How do we reconcile the greater good which Inter/Co-modality offers with delivering value to the service providers?

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Possible Breakout Group Questions

- **Q:** When have the modes effectively cooperated outside the important niche market for combined transport operations?
- **Q:** Is this assumed necessity for openness, transparency and risk sharing naïve?
- **Q:** Can it be assumed that the market will ensure cooperation between rail, road, SSS and IWW transport systems and practices so that all will be engaged in eFreight communication?
- **Q:** Should the Commission legislate and if so for what, e.g. System architecture and communication protocol?
- **Q:** Is the lack of a standard liability regime in Intermodal transport so big an impediment to effective Intermodal transport that eFreight can only have success within but not across transport modes?

Workshop 1 Feedback Gp A Barriers

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- **Group A- Professor Alan Waller**

  What are the principal barriers to an integrated E-Freight network? (& how can they be overcome).

  - Competitive positioning
  - Responsibility/power of decision makers
  - Varying levels of urgency
  - Relevance to me!
  - SME solution required
  - Standards-Physical/ICT

Workshop 1 Feedback Gp A Solutions

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- Develop Community interest
- Raise level of decision making
- Make benefits visible to company
- Need a paradigm shift
- KISS
- Interpret vision for a business (in it for me?)
- Plug the positives not problems
- Clarity of Vision
- Price of doing nothing

Workshop 1 Feedback Gp B

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- **Group B- Brian Bolam**

  Why should European Freight Logistics Stakeholders proactively support an E-Freight Network?

  - **Because if we don't get our house in order, Legislators will (& we probably won't like it**
  - Strategic view at 3 levels (strategic,business,technology)
  - Perception of "theoretical solutions"
  - I-Freight or E-Freight?
  - Eat Elephant one bite at a time
  - Network of Networks
  - Different processes for marketing advantage versus compliance
  - You can't please all of the people all of the time
  - ICT in support of "all processes" is commercial communism
  - Charge for empty trucks
  - E0freight is too admin focussed-need to look at operational improvement
  - Incentivise "mind change"
  - Consumers to drive

Workshop 1 Feedback Gp C

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- **Group C- Peter Klein**

  that are the commercial implications of adopting an E-Freight Network for Shippers & Logistics Services Companies (respectively)?

  Benefits

  Shippers

  - Reliability/visibility
  - Competitive pricing
  - Cost reduction
  - Environment

  LSP's

  - Cost Reduction
  - Mutimodal integration
  - IT Implementation efficiency
  - Environment

Workshop 1 Feedback Gp 4

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Group D – Graham Ewer

- How do we reconcile the greater good which Inter/Co-modality offers with delivering value to the service providers?
- **How?**
- Convince people
- What is the greater good-define & communicate
- Competency by mode
- Demonstrate it can work-reliability, service,cost
- Measurement & language-e-freight
- **Service to delight the customer**

Workshop 1 Feedback

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