

# Sustainable Organisation between Clusters Of Optimised Logistics @ Europe

**SoCool@EU**



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“Support sustainable economic development by boosting the competitiveness of transport-related economy”

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## **B1 Scientific and/or technical quality**

### **B1.0 Executive summary**

The transport and logistics sector continuously faces challenges like increased sustainability demands, diminishing fossil and carbon-based energy dependency, high demands with respect to cost-efficiency, reliability, safety and security, and dealing with accessibility and congestion issues. To face these challenges, innovations are needed of the transport sector itself (logistics concepts, transport modes, infrastructures), of supporting ICT and energy systems, and of legislation, public-private cooperation and governance.

Five European regions will join forces in SoCool@EU to create a platform of EU excellence for research-driven regional clusters, in order to realize an increased European collaboration for more sustainable and competitive freight gateways and hubs, and associated logistical services and (intermodal) transport operations. The five participating clusters represent key areas (deep-sea hubs, airports, land-hubs and short-sea hubs) in all four European directions as well as robust existing triple helix collaborations between regional authorities, knowledge institutes and business entities within the participating clusters.

Based on an in-depth mapping of research agenda's and stakeholders involved, the consortium will create a Joint Action Plan and related support measures. Special attention will be given to mentoring activities, with one mentoring region as part of the consortium and a separate WP dedicated to outlining mentoring support activities. SoCool@EU will contribute to the development of research-driven clusters in transport and logistics, increasing regional development and worldwide competitiveness. Triple-helix collaborations and joint strategies will stimulate R&D investments in the sector. To strengthen the ambition of advancing this project into a European platform of excellence, a detailed dissemination plan will be developed for optimal distribution and valorisation of project results, via numerous events, websites, etc.

### **B1.1 Concept and objectives**

#### **B1.1.1 Concept and main ideas**

Five regions in Europe with a dominant logistics and supply chain research-driven cluster have met and discovered that they share many current issues they are dealing with in their region. The regions are convinced they can improve their performance by joining forces and mutual learning, thus affecting each of these five regions, but also other regions throughout Europe. In four regions a mature research-driven cluster exists, based on strong 'triple helix collaborations'. A fifth region with a developing research-driven cluster has joined the consortium, through already existing collaborations. All five regions accommodate different major European logistical hubs: deep-sea hubs, airports, land-hubs, short-sea hubs, with unique intermodal connections.

Europe has a central and leading position in the worldwide flows of transport, logistics and supply chains. Transport is also an essential component of the European economy, with the industry accounting for about 7% of the EU GDP and 5% of total EU employment. The chain of production and trade cannot operate without the numerous logistical hubs throughout Europe: they are vital to a well-functioning economy.

Global developments in transport and logistics, such as the continuous growth in world trade, the expansion of 'sourcing' areas as well as the economic growth of user' markets alongside the stronger competitive position of emerging markets ask for cost-efficiency, flexibility and agility of the European transport and logistics sector. Within Europe, increasing individual wishes and demands of companies and consumers and the social urge to limit negative external environmental effects, cause an increase in complexity and dynamics in the logistic chains. Thus far, the (conflicting) demands have resulted in a suboptimal European transport system, which is also causing societal challenges, for example:

- sustainability issues, such as noise and CO<sub>2</sub>, aerosols, CxHy, NOx and SO<sub>2</sub> emissions (with global, regional or local environmental and health effects);
- diminishing (fossil and carbon based) energy dependency;
- high (user) demands with respect to cost-efficiency, reliability, safety and security;
- accessibility and congestion, mainly in and around large conurbations adjacent to hubs and gateways;
- decreasing quality of life, amongst others physical safety, hindrance and spatial separation.

To face these challenges, innovations (i.e. really implemented new concepts and ideas) are needed – innovations of the transport sector itself (logistics concepts, transport modes, infrastructures), innovations within supporting ICT and energy systems, and innovations with respect to legislation, public-private cooperation and governance.

The challenges mentioned above have been recognised by Europe as demonstrated by several policy documents such as the White Paper on Transport 2000, the PPP “European Green Cars Initiatives”, the flagship “Innovation Union” and the European strategy for smart, sustainable and inclusive growth - Europe 2020<sup>1</sup>. The new White Paper under preparation will among others focus on a competitive, innovative and environmentally-friendly industry and the removing of bottlenecks and barriers to transport. The *Green Paper on TEN-T* seeks to ensure achievement of White Paper guidelines through technology developments and interconnection and interoperability of, and access to, national networks. It identifies two approaches to realize this goal: a geographically defined priority network approach, with maritime and airports as the main entry and inter-modal connection points; and creation of a conceptual pillar identifying projects, corridors and network parts based on short, medium and long term service needs.

The *Innovation Union*<sup>2</sup> identifies a decoupled economic growth for the use of resources, a shift towards a low-carbon and energy-efficient economy, and a modernization of the transport sector, as some of its objectives. Importantly, it recognizes regions as central players because of their direct link to e.g. universities and education, SMEs and research activities. Studies<sup>3</sup> have shown that a close collaboration between industry, academia and governments will be an important driver to activate new potential in the development of physical and conceptual transport infrastructures, and to boost economic growth. Additional to cross-sector collaborations *within* the region, inter-regional and transnational cooperation is necessary to compare regional strengths, and identify and exploit regional high-value activities for an increased competitiveness.

There are five main approaches to reduce the ecological footprint of the transport industry:

1. Reducing the total amount of goods physically transported, for example by re-arranging supply chains, or redesigning of products.
2. Choosing the most sustainable transport mode for example via ships or railroads.
3. Limiting the travel distance by increasing load factors and by choosing most efficient routes.
4. Minimising the emissions per kilometre driven by implementing new propulsion technologies, new fuels, smart driving and exhaust-emission catalysts.
5. Neutralising emissions and/or reducing the effects of emissions, for example by using emission and sound absorbing asphalt or sound barriers.

Most of the measures indicated above, ask for technological innovations (vehicle technology, ICT), organisational innovations (logistics/supply chain concepts) as well as legislative innovations (incentive structures, regulation), and usually ask for collaboration between public and private parties – assisted by knowledge institutes. The ‘hardware’, ‘software’ and ‘orgware’ aspects of innovations are equally crucial to realizing the goal of a sustainable and competitive transport-related European economy.

<sup>1</sup> COM(2010) 2020 “Europe 2020 – A European Strategy for smart, sustainable and inclusive growth”, European Commission, Brussels 3.3.2010

<sup>2</sup> COM(2010) 546 final “Europe 2020 Flagship Initiative – Innovation Union”, European Commission, Brussels 06.10.2010

<sup>3</sup> Transportation & Logistics 2030 (Vol. 1 and 2)” report, elaborated by the EBS Business School

Innovation in logistics and supply chains is primordial to reaching the policy objectives for green transport and to secure economic growth in Europe. Under the current circumstances, the large scale innovations necessary are not achieved autonomously. Government intervention is necessary because of:

- *Market failure in the chain*

The development of new knowledge and concepts in the logistics and supply chain sector requires cooperation of many parties in the logistics and transport chains. Such cooperation does not come into being spontaneously because the gains of collaboration are not necessarily beneficial for all actors and/or the benefits are for other actors than those who bear the costs, benefits of concepts are long-term and/or societal benefits and do not translate to business gains, successive actors in the transport chain are not necessarily business partners, etc.

- *Lack of cooperation*

Cooperation between parties in the market ('business to business') is hampered by the fragmentation of knowledge and expertise, in combination with the fact that cooperation requires the exchange of proprietary information and the various parties have quite different power positions (large multinationals vs. SME). Moreover there is a gap between industry and academia, and a mismatch in objectives between private parties and public parties. Also, research budgets are fragmented.

- *Valorisation towards SMEs*

A large part of the operations in the logistics and supply chain sector are executed by small enterprises, with a limited innovation capacity due to low levels of professional training and investment capital. The involvement of SMEs in the innovation process requires special attention. At the other end of the spectrum, there are some highly innovation-minded individuals or small enterprises that face problems to implement their concepts at a larger scale and/or that face problems to grow into stable companies.

- *Lack of well-trained supply chain professionals*

In order to support the imperative innovation process, the logistics and supply chain sector is in need of highly trained professionals not available in sufficient quantity at the moment. The existing training capacity at higher education level is not enough to meet the needs in the sector, now and in the near future.

## **B1.1.2 Objectives**

### **Strategic objective**

SoCool@EU is based on the ambition to create an open European platform for EU excellence in sustainable and competitive supply chains and logistics connected with hubs and gateways. This European platform will enable research-driven regional clusters throughout Europe to collaborate and mutually learn to achieve more sustainable and competitive freight gateways and hubs, and associated logistical services and (intermodal) transport operations.

The basis for this platform is the existing strong 'triple helix collaborations' between regional authorities, knowledge institutes and business entities within the participating regions. SoCool@EU will further develop, strengthen and expand the collaboration within the clusters and especially between the clusters on a European level, with the aim to boost knowledge development, transfer, dissemination and sharing, and exchange of best practices and education. The regional clusters will share their respective 'best practices' regarding the 'triple helix collaboration', will inspire each other with experiences in different sub-sectors (deep-sea hubs, airports, land-hubs, short-sea hubs), will share and develop knowledge on cross-sectoral, intermodal approaches, and will further develop concepts for interlinking logistical hubs within Europe. This will contribute directly and unambiguously to improving competitiveness in Europe.

SoCool@EU will connect directly to the priorities and objectives defined at a European level so that it can accommodate itself to new trends within the economy, society, and industry, and insights in environmental and health issues. It will demonstrate public, private and mixed collaborations within and between clusters in all of its aspects: knowledge-sharing, R&D focus, world-class innovation – so that the sector and its actors can be the drivers of European industry's long-term future.

### Operational objectives of SoCool@EU

- ✓ *Fostering trans-national cooperation between research driven clusters as well as mutual learning between regional actors*

SoCool@EU will deal with specific (regional) challenges such as urban freight distribution, re-arrangement in logistic activities due to significant new infrastructures (railway, bridges, ports, etc.) and hub-oriented transport activities and their positive and negative effects in the region. Although the challenges are local or regional, all regions are faced by these problems. They can learn from each other to overcome the problems (sharing experiences). SoCool@EU will contribute to align the regional strategies with the national policies and R&D plans and the European strategy in the area of transport as according to the future White Paper. From previous experience we know that collaborating regions will make better use of available knowledge capacities and resources.

This consortium unites five specialist regions with functioning clusters in logistics and supply chains with significant regional impacts, both positive (economy, labour, availability of goods) as well as negative impacts (environment, space, accessibility). When working together, they will have a pan-European impact, enabling the wide implementation of sustainable transport systems in Europe.

The consortium has chosen the cluster approach to work around the following R&D themes:

- interconnecting major EU gateways and hubs for sustainable intermodal transport;
- mitigate local and regional effects of major hub activities and coordinate involved actors;
- increasing logistics added value without increasing transport and traffic volumes;
- enhancing environmental and economic efficiency of urban freight transport and logistics.

SoCool@EU will provide the necessary framework in the form of a platform with tools, models, instruments and guidelines. The platform will also be a dissemination channel for solutions to tackle the various challenges in the sector. The following solutions/tasks can be identified:

- new types of logistics services e.g. closed loop logistics, reverse logistics, network logistics (that both enhance efficiency for logistics operations and enhance added value without increasing transport volumes);
- better and more efficient use of resources, transport modes and infrastructures: growing smart and greener;
- increased use of environmentally friendly and efficient transport modes including an increased sharing of intermodal transport;
- the format of 'clusters' as an approach to jointly take up the challenges identified: logistics solutions ask for new types of (triple-helix) collaborations that will be implemented within/between logistics clusters;
- approaches in knowledge development, dissemination and application that support actual innovations and transitions (i.e.: really implemented new concepts and technologies).

- ✓ *Improving links between regional authorities, legal entities conducting research and the local business community*

This cluster approach has already turned out to be exceptionally effective and beneficial in the sector of logistics and supply chain management. The complexity of supply chains and the interwoven interests and assets of public and private parties asks for 'triple-helix collaboration' which already has a solid basis in the participating clusters but can be improved further. The knowledge to be developed and shared can be applied directly in regional policy and business strategies. Isolated regional logistics policies are illogical because of the interregional and international nature of logistics and supply chains; only coordinated policies will be effective.

- ✓ *Developing and implementing joint action plans at the European level to increase regional economic competitiveness*

SoCool@EU will develop a Joint Action Plan. The consortium will deal with the challenges described above and importantly, the collaborating regions will avoid parallel developments and will accomplish new



synergies, complementarities and multiplier effects. These actions plans will support and drive the creation of the EU policies within intermodal transportation and co-modality and the creation of knowledge that will allow Europe to increase its economical growth without increasing its CO2 emissions.

✓ *Supporting the internationalization of the regional research-driven clusters*

The clusters united in SoCool@EU already represent a wide geographic and thematic spread but are faced with comparable challenges and the regions have developed similar solution types. Clusters will be able to further develop their interlinking (European) investments in RTD and infrastructures. SoCool@EU is set up as a starting point and will evolve into an open European platform of excellence that will contribute to the internationalization of regional clusters and the importance of research in this context. This strong platform of regional clusters will be capable of coordinating European investments in RTD (FP7, FP8, CIP), infrastructures (TEN-T), not to forget the programs related to services such as Marco Polo (SMEs) and Motorways of the Sea as well as the best use of the new financial instruments created by the European Commission and the European Investment Bank.

✓ *Mentoring regions with a less developed research profile*

The cluster platform will be created by highly developed regions that will offer mentoring to regions with a less developed research profile, share knowledge and provide access to a network of clusters beyond SoCool@EU to support their capacity building. Initially, the project will provide such activities to the Region of Mersin. Other regions will be actively invited to participate in the platform through the various dissemination activities of SoCool@EU. Already during the preparation phase of SoCool@EU several regions have shown their interest to participate, as expressed in various letters of interest supporting this proposal (see Annex 2). Throughout work package 2 an analysis and integration of research agendas will allow the highly developed regions to offer support for the Region of Mersin to analyse the complementarities and the feasibility of the logistics activity, so that it can define its own action plan for the setting up of new regional research-driven cluster.

### **B1.1.3 Regional state of play**

Five regions participate in SoCool@EU: Rijn-Schelde Delta (NL/B), Aragón (ES), Frankfurt/Rhein-Main (DE), Øresund (SE/DK) and Mersin (TU).



Introductory/explanatory note: in collecting key figures for the regions involved, it has proven challenging to gather equivalent and comparable figures to illustrate the regional state of play. One of the objectives of SoCool@EU is streamlining available statistics within and between clusters, for comparative, educational and economic purposes. Mapping the regional situation in the logistics sector will help identify bottlenecks and challenges and will prove a valuable instrument for policymaking.

### Rhine-Scheldt Delta

The Rhine-Scheldt Delta region is located in the south-west of the Netherlands and the north-west of Belgium, at the estuary of the Rhine, Meuse and Scheldt rivers. It hosts the European number 1 and 2 ports - Rotterdam and Antwerp - with surrounding areas that accommodate large volumes of transport into and from Europe, by road, rail and inland waterway. Because the ports are connected to all the main European highways and to a well-developed railway network for passenger and freight transport, European markets and the hinterland including Great Britain can be reached within 24 hours. There is also a connection to the high speed train network between Paris and Amsterdam and a link to London via the Eurostar. With a high concentration of world and intra-regional ports (Rotterdam, Antwerp, Vlissingen, Terneuzen, Dordrecht, Gent, Oostende and Zeebrugge) transportation by ship plays a key role in the region. The Rhine-Scheldt Delta is also very close to the international airports of Amsterdam (Schiphol), Brussels (Zaventem), Oostende and Rotterdam – each of them well-equipped for efficient handling of international air cargo. Many logistic and supply chain enterprises are located in the region.

Key figures in the logistics sector in Rhine-Scheldt Delta

<b>GDP / Turnover</b>	<b>€ 21 615 million</b>	<b>2007, estimated</b>
<b>Foreign direct investment (FDI)</b>	<b>€ 355 million</b>	<b>2009, estimated</b>
<b>R&amp;D expenditure</b>	<b>€ 15 million</b>	<b>2010, estimated</b>
<b>Workforce</b>	<b>274 300</b>	<b>2008, estimated</b>
<b>No. of enterprises</b>	<b>18 000</b>	<b>2009, estimated</b>
<b>No. of start-ups</b>	<b>560</b>	<b>2009, estimated</b>

#### *Potential for increased growth and competitiveness*

60% of the population of the European Union lives within 500 km of the region, which amounts to a market of € 180 million. Brussels, Amsterdam, Paris, Luxemburg, London and the Ruhr area are all located within this area, the economic and political heart of Europe. The strategic location between two world ports and the central position in Europe combined with the multimodal infrastructure make the region very attractive for companies in logistics and distribution. The logistic companies offer a full service package varying from transportation, distribution and storage to "value-added logistics". Through a number of dedicated funding programs, national and regional authorities aim to call for innovative projects in logistics and supply chain management. These calls are aimed at both private and public sector organisations, to develop high-level approaches to sustainable logistics and supply management. As the availability of professionals in the field of logistics and supply chain management is still limited, there is both need and room for professional education in this specific field.

### Aragón

Aragón is located at the convergence of transportation routes which link the most economically vibrant regions of Spain and Southern France. Its position in the South of Europe and just North of Africa, allows for a large area of influence covering the main European capitals and establishing an important communication channel with Africa. A strong logistics tradition and a privileged geostrategic location, reinforced by significant investment in transportation and communications infrastructure, have made Aragón a logistics centre of international stature.

In the past years, the Aragón regional government has been developing the 'Aragón Logistics' program for the development and growth of the regional economy through logistics activities. More than 3000 hectares in Aragón are dedicated to initiatives related with Logistics, from public and private sector, and these initiatives have the main goal of promoting the Logistics Community of Aragón. 4 big logistics platforms use



more than 1700 hectares in Zaragoza, Huesca, Teruel and Fraga. With an area of 12.826.898 m<sup>2</sup>, the Logistics Platform of Zaragoza (PLAZA) is the largest logistics premises on the European continent. The principle characteristic of PLAZA is that it is based on an intermodal transport centre (railways, roads, and air routes as it includes an international airport), a combination which activates capacities which make Zaragoza one of the most important logistical cities in Europe, with connections to the most relevant European production and consumer centres. Examples of other regional initiatives include Mercazaragoza, a logistics platform specialized in food working in a big area with plenty of companies; the Ciudad del Transporte, an industrial park bringing together more than 200 transportation companies; and the modern Parque Tecnológico de Reciclado, a recycling technology park.

#### Key figures in the logistics sector in Aragón

<b>GDP / Turnover</b>	<b>€ 34 088 million</b>	<b>2008</b>
<b>Foreign direct investment (FDI)</b>	€ 60 million	Per year
<b>R&amp;D expenditure</b>	€ 10 million	3% of the total R&D expenditure, 55% of this amount is managed by the industry
<b>Workforce</b>	65 848	2009
<b>No. of enterprises</b>	6 282	2008
<b>No. of start-ups</b>	16	2009

#### *Potential for increased growth and competitiveness*

Thanks to an intense public and private promotion of logistics, Aragón has developed key competencies in this area of activity: for example, it concentrates more than 30% of all logistic surface in Spain, it is home to one of the leading European research and education institutes in logistics (MIT-ZLC), it has developed one of the leading intermodal logistics parks in Europe (PLAZA), and 5% of the GDP already comes from the logistics sector. The region has experienced an increase of 10% in the number of business entities dedicated to the area since the year 2000 and a future yearly increase of 7% is expected. Also, the field of transportation of merchandise has increased a 75% in the period of 2000-2006, which represents an annual growth of 10%, and the sector shows a potential annual future growth of 5%. Finally, the sector of logistics and transportation has created a 6% of all new employments in the region and this growth is expected to continue.

#### **Frankfurt/Rhine-Main**

Overall, the economic situation in the Rhine-Main area can be characterised as highly competitive. Principal factors of the excellent geographic positioning are its function as a gateway, highly developed infrastructures and logistical processes, and an excellent range of knowledge-intensive services with a logistics reference. The region enjoys best accessibility in the centre of Europe, directly at Frankfurt Airport as one of Europe's biggest airports, with ICE and S-Bahn connection, next to the Frankfurt intersection highways A3 / A5 as one of Europe's most frequented traffic hubs. The region benefits from highly developed industry clusters within the range of 200 km that complement one another with their service and product portfolios. The development of employment in logistics is with over 3.5% per year the largest and most dynamic in the leading regional clusters of Rhine-Main. Logistics and transport are known to be the core competencies of the region and Rhine-Main is among the TOP 3 logistics regions in Germany. Logistics and transport have been officially identified as one of the 10 leading and future-oriented sectors in Rhine-Main. According to a study by the Bundesinstitut für Bau-, Stadt- und Raumforschung (BBSR), Frankfurt Rhine-Main is the very leading metropolitan area concerning transport in Europe (difference of the Frankfurt transport index to the second-ranked London: 25 points from 100). In sum, over 330.000 vehicles pass the highway intersection at the Frankfurt airport on a daily basis, with tendencies to go up further. The 4 largest companies of the region (according to employed) have their core competencies in logistics and transport, namely Lufthansa, Deutsche Bahn, Deutsche Post and Fraport. Fifteen out of the global top 100 logistics companies are represented in the region.

The regional policy priorities are aligned with the historically grown economic conditions of the region. The logistics- and transport region of Rhine-Main has a several centuries old tradition as market place and interface for important European trade routes. Frankfurt city, for example, gained trade fair reputation as

early as 1240 A.D. Therefore, transport and trade flows have always been a vital attribute of the region and the political agenda. The Planungsverband is a representative institution of the Rhine-Main-Region. Aiming at regional development, it has identified 10 future-oriented key-markets or leading clusters. Critical aspects of this vision are logistics and transport. The state law concerning the regional funding and the path of development towards strong regional cooperation in the metropolitan area of Frankfurt Rhine-Main ensures that the region has a constant improvement, utilizing regional marketing, funding of economical development as well as regional traffic planning and traffic management.

#### Key figures in the logistics sector in Frankfurt/Rhine-Main

GDP / Turnover	€ 20 000 million	per year
Foreign direct investment (FDI)	€ 2 500 million	per year
R&D expenditure	€ 450 million	per year
Workforce	240,000	
No. of enterprises	13,000	
No. of start-ups	600	

#### Potential for increased growth and competitiveness

The Rhine-Main-Region will remain a logistics and transport hub in Germany. To give an illustrating example, the good flows in the Rhine-Main region in 2006 amounted to around 300 million tons of freight and are expected to reach over 400 million tons in 2030. This indicates a growth potential of over 30%. The volume of through-going traffic in the region will increase from 140 million tons of transit mass nowadays to over 200 million tons in 2030. This is an increase by nearly 50% or a yearly average growth rate of around 1.8%. The airport operator Fraport will invest 7 billion Euros in the development of Frankfurt Airport up to 2016, raising e.g. passenger capacity by more than 20 million p.a. and giving raise to 3,16 million tons of freight volume in 2020 (2009: 2,11 million). Around 20 universities are constantly expanding their logistics- and transport-related study programs in the region and the urban catchment area.

#### Øresund

The Øresund Region is located in the Eastern part of Denmark and the Southern part of Sweden and consists of the Regions of Skåne, Zealand and The Capital Region of Denmark. A quarter of the combined GDP of Sweden and Denmark is generated in the region and there are 175.000 companies present. The Øresund Region is inter-connected by the Øresund Bridge and is the main gateway between Scandinavia and continental Europe for all modes of transportation, as well as a hub for distribution to Scandinavia and the Baltic rim. The dominating ports are Copenhagen Malmö Port (the two ports of Copenhagen and Malmö merged after the construction of the Øresund bridge), Trelleborg and Helsingborg, which all are main gateways in Scandinavia. Furthermore, Copenhagen airport is the largest international airport in Scandinavia for cargo as well as passengers. Logistics generated over € 19 billion turnover in 2003 and there were more than 77.000 employees in the cluster in 2004. Shipping is by far the largest activity on the Danish side of the cluster. Danish companies control around 10% of the global turnover within shipping and the companies present in the cluster include head quarters of major players such as A. P. Møller-Mærsk, Clipper, Norden, Torm and J. Lauritzen. On the Swedish side of the cluster "Freight forwarding, supporting services and goods handling" is the largest activity type followed by "road transportation". Core competencies include packaging and food logistics, with large players as Tetra Pak and Rexam within packaging and Findus, Danisco Sugar, Unilever, Nestlé and IKEA in cooperation with BRING Frigoscandia as major players within food. The workforce in the logistics cluster in the Øresund Region is generally well educated. High costs constantly put the sector under pressure with a demand for efficiency improvements as well as innovations in order to retain competitiveness. A transition towards higher value creation is therefore strongly encouraged by regional policies, which mainly focus on research driven innovation, capacity building of the workforce and increased entrepreneurship.

#### Key figures in the logistics sector in Øresund

GDP / Turnover	€ 19 000 million	2003
Foreign direct investment (FDI)	NA	

<b>R&amp;D expenditure</b>	€ 4 920 318	2005
<b>Workforce</b>	77.148	2004
<b>No. of enterprises</b>	175 000	2010 (all sectors)
<b>No. of start-ups</b>	1 056	2006

#### *Potential for increased growth and competitiveness*

The Øresund region has a strong position within logistics due to its geographical location as the main gate to Scandinavia and the Baltic rim, a high population density, a well-educated labour force and availability of supporting institutions such as universities. The cluster's main challenge is competition from regions with lower costs, especially since salaries are relatively high. In order to develop the logistics cluster, the regional stakeholders are greatly motivated towards promoting policies that increase productivity and create new business activities which replace the ones that are off-shored and outsourced to e.g. Asia. The general perception is that it is necessary to promote bottom-up network oriented collaboration between triple-helix actors in order to create synergy between the central stakeholders in the cluster and thereby increase value creation through areas such as more knowledge, innovation and entrepreneurship. One area which is receiving increased attention in this context is the possibility to decouple CO<sub>2</sub> emissions from freight and thereby differentiate services and reduce the risk of negative economic effects from suddenly increasing fuel prices and energy scarcity. Logistics dependency on fossil fuel is perceived as a risk for future growth, not only within the sector itself but also other industry sectors since logistics constitute the backbone of the economy. In 2020 the Øresund Region will have a direct access to Northern Germany with a fixed link over the Fehmarn belt. This is expected to have very positive effects on the development of new concepts for sustainable co-modal logistics solutions between Scandinavia and continental Europe. Hence, the Fehmarn belt fixed link will further improve the Øresund Region's position as a logistics hub and knowledge region within sustainable logistics in Northern Europe.

#### **Mersin (mentoring region)**

Located at the Mediterranean Coast of Turkey, Mersin has become a highly vigorous trade point of the Mediterranean Region. Mersin has also gained, in today's globalized trade world particularly in the Mediterranean Region, an exceptional fame as trade and logistics centre. The statistical data released in 2007 reveals that Mersin province (region) has 15.000 km<sup>2</sup> surface area with a population of around 1.6 million (region), 66,2 % of whom live in the city centre, is the 9<sup>th</sup> most populated city in Turkey.

In terms of productivity in agricultural and industrial sectors Mersin ranks above the average rates reached in Turkey. In addition to these two major sectors international and domestic trade has a strong infrastructure and a sound basis due to the availability of the Port and the Free Trade Zone and the well established experience (social capital) in foreign trade. In order to contribute to the development of those three sectors, Mersin has considerably strong capacity of logistics operations and potential of development in both foreign trade as well as the domestic market.

In addition, raw materials and semi-products that manufacturing industry demands are provided by logistics infrastructure of Mersin from industrial neighbouring cities, the south eastern part of Turkey and from international markets.

#### Key figures in the logistics sector in Mersin

<b>GDP / Turnover</b>	€ 90 million
<b>Foreign direct investment (FDI)</b>	€ 20 million
<b>R&amp;D expenditure</b>	€ 10 million
<b>Workforce</b>	4.800
<b>No. of enterprises</b>	62
<b>No. of start-ups</b>	7

#### *Potential for increased growth and competitiveness*

Logistics is rather a new sector in Mersin, and it has made progress in recent years. With its suitable location on the Eastern Mediterranean coast, Mersin has been a focal point of sea transportation both for

Turkey and for the countries (EU Countries, Middle-East Countries, and CIS Countries) in the hinterland. Its function for distribution of the unloaded cargo in the land and for collection of the cargo from the land to be shipped by sea has made the city a certain logistics hub for the region and this potential triggered the land (road) and railway transportation, foreign trading and the other sub-sectors of logistics to develop in the city in time. Today, all these services are available in the city at a certain scale.

Another factor which supports and increases the importance of Mersin in terms of foreign trade and logistics is the Mersin Free Trade Zone, located next to the Mersin Port. Mersin Free Trade Zone has its own independent pier (quay) for direct loading/unloading operations from/to ships. With its special legislation (regulations) providing advantages for foreign trade operations, its geographical location, excellent infrastructure and its professional management, Mersin Free Zone employs more than 7.000 staff and is an attractive business environment in foreign trade both for Mersin and its hinterland. However, the Free Trade Zone needs functional and structural transformation in order to sustain its competitive advantages. Improvement of logistics infrastructure and technology will provide reduced factor prices and efficiency. Compared to international market standards, technological capacity of supply chain services in the region are less developed. Hence installation of IT infrastructure and firm based penetration will have noticeable contribution to the regional logistics cluster, and increase value-added services.

#### B1.1.4 Presentation of the clusters

##### Rhine-Scheldt Delta: **Dinalog**

<p><b>Research Entity</b></p> <ul style="list-style-type: none"> <li>• Erasmus University Rotterdam</li> <li>• Technical University of Eindhoven</li> <li>• Technical University of Delft</li> <li>• Vlaams Instituut voor de Logistiek</li> <li>• University of Antwerp</li> <li>• University of Ghent</li> <li>• Avans Polytechnic University</li> <li>• Fontys Hogeschool</li> <li>• InHolland</li> <li>• Military Academy (incl. Logistics)</li> <li>• And 4 others</li> </ul>	<p><b>Regional Authority</b></p> <ul style="list-style-type: none"> <li>• Province of Noord-Brabant</li> <li>• Municipality of Breda</li> <li>• Province of Zeeland</li> <li>• Province of Zuid-Holland</li> <li>• Province of Antwerp</li> </ul>
<p><b>Business Entity</b></p> <ul style="list-style-type: none"> <li>• Unilever</li> <li>• TLN/KNV</li> <li>• Port of Rotterdam</li> <li>• Coca Cola</li> <li>• Jan de Rijk Logistics</li> <li>• Philip Morris</li> <li>• ING</li> <li>• HERO</li> <li>• Dinalog Friends (association of SMEs)</li> <li>• VIL members (252)</li> <li>• And 8 others</li> </ul>	<p><b>Other Actors</b></p> <ul style="list-style-type: none"> <li>• European Supply Chain Forum</li> <li>• Service Logistics Forum</li> <li>• Regional Development Agencies (BOM, EIZ, REWIN)</li> <li>• Bestuurlijk overleg Zuid-West Nederland / Vlaams Nederlandse Delta</li> <li>• Platform Vital Logistics South-West</li> <li>• Flemish Regional Development Agencies (POM Antwerpen, Oost-Vlaanderen, West-Vlaanderen, Vlaams-Brabant and Limburg)</li> </ul>

The Dutch Institute for Advanced Logistics (Dinalog) has been created to unite and coordinate regional efforts to improve the competitiveness of the logistics sector. It was established to unroll the national research and development program for logistics and supply chain management. Through its cooperation with VIL, Dinalog covers the complete Belgian – Dutch region Rijn-Scheldt Delta. Dinalog represents the triple-helix cluster in the region of Rijn-Scheldt Delta as it involves all actors in the region that operate in the sectors of logistics and supply chain management. The institute is firmly based in science but explicitly operates in the cooperation between the triple helix parties: private enterprises (shippers and logistic

service providers), international, national, regional and local public authorities and knowledge institutes. Dinalog has four main tasks: developing knowledge, applying knowledge, stimulating and organising education in logistics and supply chain management and last but not least dissemination of knowledge, especially to SME's, to increase the competitiveness of the logistics companies. The main themes of interest are: Cross Chain Control Centres (4C), Main Ports Control Function, and Service Logistics. Dinalog strives for open innovation. Dinalog is also responsible for development and exploitation of the open innovation campus on logistics and supply chain management, located in the heart of the Rhine-Scheldt Delta (Breda).

### *Knowledge*

Dinalog is the physical and virtual place where public and private sector cooperates with all centers of excellence (the universities and polytechnics) in the region and where post-experience education will be organized. Dinalog builds a strategic cooperation with VIL (Flemish Institute for Logistics). VIL was founded in 2003 as an independent knowledge centre and innovation platform for the logistics sector. In order to do so, VIL is supported by the Flemish government, and more specifically by the Minister of Innovation. The VIL offers the logistics service providers and shippers company-specific research into innovative topics and valorisation of the research results in practice. Flemish companies are encouraged to invest in innovative and sustainable logistics concepts and technological developments. Hereto, VIL delivers financial support, project management and implementation, advice and networking. VIL has three main tasks: developing knowledge, applying knowledge and dissemination knowledge, to increase the competitiveness of the logistics companies. VIL wants to achieve this ambition in three areas: Supply chain organisation, supply chain intelligence and supply chain security. Substance is added to those three areas in a bottom-up process: on the basis of input from brainstorming sessions involving VIL members and others, in combination with company visits, the advisory board (academics and professionals), the board of directors and enhanced VIL expertise.

### *Fit between the cluster and the regional economic policy*

The Dutch Multi-annual Program for Infrastructure and Transport (MIT) 2011 identifies a number of priority themes for the region, among which a sustainable and safe delta, seaports and related activity, knowledge economy, accessibility. Policy aims at strengthening the economic innovative cluster, creating an excellent climate for foreign investments, and improving accessibility by developing multi-modal hubs, among others. Budget has been allocated for expanding existing and creating new highway and rail connections, exploratory studies are scheduled to anticipate capacity bottlenecks for waterway locks. Developing the region into a sustainable, competitive European knowledge region is one of the umbrella ambitions. Regional policy based on the MIT is detailed in concrete plans and project in the individual Provincial Traffic and Transportation Plans. These policy plans are elaborated in close collaboration with cluster members and incorporated into the cluster's implementation plans and activities.

For Flanders, the 'Vlaanderen in actie' (Flanders in action) programme of the Flemish government, the logistics sector has been defined as one of the six most important sectors on which the government will focus. The Flemish part of the Rhine-Scheldt Delta cluster aims to leverage Flanders as a sustainable innovative logistics top region in Europe. To leverage means to create more value for economic operators in Flanders which results in: socio-economical value, financial value of logistical activities, competitive value for Flanders as a top region, etc. VIL writes periodic business plans, including the research strategy, which are evaluated by a board of Flemish and foreign external experts and which has to be approved by the Institute for Sciences, Technology and Innovation. Upon approval, the funding is given. The structural coordination between the research strategy of the research cluster and the regional economic policy is safeguarded via Flanders Logistics. This is an initiative launched by the minister-president of the Flemish government, aiming at coordinating the activities of the different parties active in the field of logistics. The VIL is actively participating in this project. Finally, plans are in progress to capture a more structural cooperation between the regional research entities, business entities and regional authorities involved.

Since early 2009, Dinalog and VIL are intensifying their collaboration, also in close collaboration and with the support of regional authorities in the Rhine-Scheldt Delta.



## Aragón ALIA - Agrupación Logística Innovadora de Aragón

<b>Research Entity</b> <ul style="list-style-type: none"> <li>• Zaragoza Logistics Centre (ZLC)</li> <li>• Aragón Technology Institute (ITA)</li> </ul>	<b>Regional Authority</b> <ul style="list-style-type: none"> <li>• Department of Economy, Inland Revenue and Employment of the Government of Aragón</li> <li>• Department of Science, Technology and University of the Government of Aragón.</li> <li>• Aragón Exterior</li> </ul>
<b>Business Entity</b> <ul style="list-style-type: none"> <li>• Bosal España, S.A</li> <li>• BSH Electrodomésticos España, S.A</li> <li>• Grupo Samca</li> <li>• Grupo Jorge</li> <li>• Pronimetall Corporación Metalúrgica</li> <li>• Imaginarium, S.A.</li> <li>• Carreras, S.A. (Carreras Grupo Logístico)</li> <li>• Taim Weser, S.A.</li> <li>• ARC Distribución</li> <li>• Bebinter, S.A.</li> <li>• And 20 others</li> </ul>	<b>Other Actors</b> <ul style="list-style-type: none"> <li>• Technology Transfer Office at the University of Zaragoza</li> <li>• Technology Transfer Office at Zaragoza Logistics Centre</li> <li>• Council for the Chambers of Commerce and Industry of Aragón</li> </ul>

ALIA is the Association of Innovative Logistics of Aragón. ALIA has been created to unite and coordinate regional efforts to improve the competitiveness of member companies through collaboration and logistics innovation. It represents the triple-helix cluster in the region of Aragón as it involves all actors in the region that operate in the sectors of logistics and transportation, primarily business entities, with the aim of promoting Aragón as an international centre of excellence in the sector and contributing to the economical, social and technological development within the sector and the associated companies. The involvement of the business entities in ALIA offers the private sector the possibility of having a direct involvement in co-defining the regional policy within the area of logistics. The Regional Department of Science and Technology is the executor of the regional R&D policies and the Department of Economy decides upon in which strategic initiatives the region should invest. The connection between ALIA and the Regional Government is guaranteed by Aragón Exterior. Attached to the Department of Economy, Inland Revenue and Employment of the Government of Aragón, Aragón Exterior is the instrument of the Regional Government to support the internationalisation of the Aragonese economy. By this way, Aragón Exterior contributes to put into effect the regional goals in matter of economic development. In addition, regional authorities also have a direct involvement, policy-wise and funding-wise, in all research entities represented in this research-driven cluster, through the Dept. of Science, Technology and University. The Association is promoted by the Technology Transfer Offices at Zaragoza Logistics Centre and ITA and the Council for the Chambers of Commerce and Industry of Aragón. The involved entities have been collaborating for several years and therefore the cluster has demonstrated to be a mature research-driven cluster. All of these members of ALIA have given the authority to ALIA to formally represent all partners for the purpose of this project. This balance of interests ensures a close collaboration among all partners of the cluster and for this reason ALIA wishes to establish a common valorisation and R&D exploitation strategy.

ALIA is financed through mixed funding options. Around 65% of the budget comes from public funding. The Department of Economy of the Regional authorities has provided the initial budget and the Department of Science and Technology has ensured a specific line for the funding of clusters for the upcoming years. Also, ALIA functions as a cooperation enabler to develop innovative knowledge and disseminate research results and it provides information about funding opportunities for research or project programs; especially the programs offered by the European Union, such as Marco Polo. Associated members therefore have the opportunity to become involved in publicly financed projects. The research results that will be generated through these projects will belong to the individual project partners who generated them. Finally regarding private funding the association generates income from membership fees and will offer training courses for which they will require a payment for tuition.



### *Knowledge*

Aragón has a prestigious reserve of researchers and students working in the field of Logistics and Supply Chain Management at the University of Zaragoza and especially in Zaragoza Logistics Centre (ZLC). ZLC is an international centre for education and research in Logistics and Supply Chain Management established by the Government of Aragón in Spain in partnership with the Massachusetts Institute of Technology (MIT) and the University of Zaragoza. The ZLC has developed, in collaboration with the Centre of Transportation and Logistics of MIT, the MIT-Zaragoza International Logistics Program that offers the Master of Engineering in Logistics & Supply Chain Management program, a doctorate degree, and executive education courses. ZLC has also been designated by the Ministry of Education and Sciences in Spain to be the National Centre of Excellence for research in the area of logistics and supply chain management, and it is the coordinator of Logistop, the Spanish Technology Platform in Logistics. The Aragon Institute of Technology (ITA) is a public technological research centre whose mission is to contribute to the promotion and execution of the research and the development orientating its activity to stimulate the technological innovation of the companies. ITA participates in R&D projects which are in the state of the art at international and national level, and then, ITA works closely with regional SMEs and other big companies in order to transform that knowledge in very innovative products and processes. ITA eLogistica is the name of the National Centre of Knowledge in the application of ICT technologies to the resolution of problems in the field of integral logistics (the centre is funded by the Ministry of Industry, Tourism and Commerce, Government of Spain). ITA eLogistica mission is based on the generation, adaptation, transfer and dissemination of knowledge in the application of ICT for the integral logistics, focusing on process optimization and agent's integration along the supply chain in order to develop green and a collaborative logistics. Finally, the research interests of the Research Institute of Engineering of Aragón (I3A) of the University of Zaragoza searches technological solutions for the future by promoting innovation and excellence. The activities of the I3A concerned four areas: research, technology transfer, training and scientific diffusion. With regard to the knowledge valorisation the Technology Transfer Office at Zaragoza Logistics Centre offers the perfect channels for applying the knowledge created in the project in companies, government bodies and individuals. Also, the Technology Transfer Office at ITA assists in technology transfer processes to more than 1.000 national and international companies every year. It also aims to promote technology cooperation processes among companies as a way of achieving a critical mass allowing them to access elite markets with strict requirements difficult for an individual company to meet owing to its modest size.

Among others, ALIA collaborates with the project "Red Aragón 7PM" (Aragonese Network of 7FP), that is financed by the Spanish Ministry of Science and Innovation. This network currently integrates 11 regional entities that include several research and educational entities (ZLC, ITA, University of Zaragoza, etc.), the Business Confederation of Zaragoza (CEZ) and ARES. The objective of this initiative is to create and implement a common regional strategy that strengthens the participation of the different scientific-technological agents in the 7<sup>th</sup> Framework Programme of the European Union. Also, ALIA is working with the Spanish Integral Logistics Technology Platform (Logistop) that was created with the objective of increasing the effectiveness of Spanish logistics activity for Science, Technology and Business System agents. It is a work forum which aims to align strategies and combine forces in order to strengthen this industrial activity in Spain and it aims to promote innovation, encourage cooperation among agents, train and develop qualified personnel and raise awareness of the public administration in aspects relevant to logistics activity, among other objectives, through the generation and distribution of information. In addition, contacts have already been established with other regional clusters such as CAAR (Cluster for regional business entities within automobile industry), IDIA (Cluster for regional companies and institutions within the area of innovation in processes and products) and TECNARA (the Association of Information technology, Electronics and Telecommunications of Aragón).

### *Fit between the cluster and the regional economic policy*

Aragón has executed the 2<sup>nd</sup> Regional Plan for Research Development and Technology Transfer (2005-2010) successfully and is currently working on an Action Plan that considers the R&D perspectives of Aragón in the years 2011-2013. The Regional authorities will therefore intensify the instruments offered so far to

support activities in this area. Also, the European Commission has approved an operational programme for the Aragon region for the period 2007-2013, under the “Regional competitiveness and employment” objective, co-financed by the European Regional Development Fund (ERDF). This programme, with a total budget of approximately €326 millions, aims to improve the mechanisms for technological transfers between public research centres and businesses so as to help the region to better exploit its full potential, through a considerable support for research, technology transfer and innovation. In addition, the Ministry of Science and Innovation in Spain has signed an agreement with the Regional Government of Aragón in October 2010 to expand the National Strategy of Innovation to this region. This Agreement includes a specific line of action that mentions the support, both strategic and economical, to regional clusters; one being ALIA that is dedicated specifically to logistics. Finally, the Aragón Logistics Program, also developed by the Regional Government, aims at an increased growth of the regional economy through logistics activities. The program has already resulted in many wide-ranging private, public and/or mixed projects that have boosted the transport and logistics sector in Aragón. The Ministry of Economy, Inland Revenue and Employment of Aragon has expressed its commitment to ensure that the results of the project So-Cool@EU would be integrated in the regional strategy in a letter sent to the President of ALIA (see Annex 3). This level of endorsement given by the Regional Government is the maximum achievable according to the Spanish laws.

### Frankfurt/Rhine-Main **HOLM - House of Logistics and Mobility**

<b>Research Entities</b> <ul style="list-style-type: none"> <li>• EBS Universität i. Gr. /Supply Chain Management Institute (SMI)</li> <li>• Fachhochschule Frankfurt</li> <li>• Fachhochschule Worms</li> <li>• Fraunhofer Institut für Materialfluss und Logistik</li> <li>• Fraunhofer-Gesellschaft zur Förderung der angewandten Forschung e.V.</li> <li>• Goethe Universität Frankfurt am Main</li> <li>• Hochschule Aschaffenburg</li> <li>• Hochschule Fresenius</li> <li>• Hochschule für Gestaltung, Offenbach</li> <li>• Hochschule RheinMain</li> <li>• International School of Management</li> <li>• Technische Universität Darmstadt</li> <li>• Universität Kassel</li> </ul>	<b>Regional Authorities</b> <ul style="list-style-type: none"> <li>• Hess. Ministerium f. Wirtschaft, Verkehr u. Landesentwicklung</li> <li>• Hessisches Ministerium der Finanzen</li> <li>• Hessisches Ministerium des Inneren und für Sport</li> <li>• Hessisches Ministerium für Wissenschaft und Kunst Landeshauptstadt Wiesbaden</li> <li>• Landeshauptstadt Wiesbaden</li> <li>• Land Rheinland-Pfalz (Ministerium für Wirtschaft, Verkehr, Landwirtschaft und Weinbau)</li> <li>• Planungsverband Ballungsraum Frankfurt/Rhein-Main</li> <li>• Stadt Aschaffenburg</li> <li>• Stadt Frankfurt am Main</li> </ul>
<b>Business Entities</b> <ul style="list-style-type: none"> <li>• Bombardier Transportation</li> <li>• Deutsche Bahn AG</li> <li>• DPD Deutsche GeoPost (DE) GmbH &amp; Co. KG</li> <li>• Gateway Gardens Projektentwicklungs-GmbH</li> <li>• Logistics Council Germany</li> <li>• Rhein-Main-Verkehrsverbund Service-GmbH</li> <li>• Schenker Deutschland AG</li> <li>• ZIV Zentrum f. integrierte Verkehrssysteme GmbH</li> <li>• And 91 others</li> </ul>	<b>Other Actors</b> <ul style="list-style-type: none"> <li>• ADAC Hessen-Thüringen e.V.</li> <li>• Arbeitsgemeinschaft hessischer Industrie- und Handelskammern</li> <li>• Bundesvereinigung Logistik (BVL)</li> <li>• Fachverband Fördertechnik und Logistiksysteme</li> <li>• FrankfurtRheinMain GmbH International Marketing of the Region</li> <li>• Verband Deutscher Verkehrsunternehmen</li> <li>• Wirtschaftsförderung Region Frankfurt RheinMain</li> <li>• And 20 others</li> </ul>

The legal entity that “institutionalizes” the logistics and mobility cluster Rhine-Main is the House of Logistics and Mobility (HOLM) at the Frankfurt Airport / Gateway Gardens, founded by the Federal State of Hessen, the City of Frankfurt, and several business partners. It is a neutral, interdisciplinary cooperation platform bringing together international and national research, business, and public entities under one roof/brand “HOLM” that develops and communicates innovative and future-driven knowledge at the interface of

interdisciplinary logistics and mobility subjects. Its guiding topics are “integration”, “sustainability” and “security” of e.g. supply chains. HOLM will set up a physical Logistics and Mobility Campus Building directly at Frankfurt Airport with about 20,000 sqm until 2013. Currently, the HOLM is embodied in the Gründungsinitiative Frankfurt HOLM e.V. as the founding association with members from research, business, and public institutions and a HOLM Ltd. to set up the knowledge infrastructure (financed by the State of Hessen and the City of Frankfurt) and to organize the content development, marketing, events, and networking.

The total number of professorships within the institutions which are involved from the beginning, Frankfurt University of Applied Sciences, the Goethe University, the European Business School, TU Darmstadt and Fraunhofer IML, is already in excess of 50 – a multi-faceted plurality of competence that’s almost beyond international compare – and of the “critical mass” required to become a focus of gravitation within the international knowledge network and to assume a leading role within it. The knowledge institutes foster the research and education capabilities within the region, by offering and conducting student graduate and undergraduate as well as MBA and executive programs in cluster and competitiveness topics, logistics, purchasing & supply chain management, technology and IT research, network & innovation system research, and cluster research. The “door to door” collaboration in HOLM seeks to combine the existing competencies and accelerate the transfer of knowledge into practice and back to science. In the process, the HOLM sees itself as an inter-university cooperation platform for research and education, closely interlinked with practice. The association already counts 180 members. As an Institution for Collaboration, it is indispensable in uniting business, science, and policy in the regional logistics cluster of Rhine-Main.

Cluster partners work on common projects, such as marketing activities for the region, the development of innovative logistics and mobility concepts, networking events, cluster initiatives, cluster & network research, etc. With entering the HOLM initiative, members have the opportunity to be elected into the board of directors or the advisory council included in the governance structure of HOLM. This depends on activity and (financial) commitment. They are also part of the regular meetings of members and become involved in the numerous research project teams of the HOLM. The City of Frankfurt and the State of Hessen as the initiators and members of the HOLM initiative hold their seats in the board of directors and are part of the HOLM governance and support in funding HOLM infrastructure. Further regional authorities, such as the Hessen Agentur or the Planungsverband, are members of the advisory council, which is involved in the development of the research strategy. So at HOLM, there is regular exchange between the public on the one hand and science as well as the private sector on the other hand. Research results belong to the individual project partners who generated them. The HOLM is the enabler and the cooperation platform to develop innovative knowledge and research results. If project partners are successful in bringing out new results out of research and development activities, patent information centres of regional authorities, such as the one organised by the Hessen Agentur, support the project partners in securing their property rights by giving them legal advice and introducing them to the patent system. This offer especially stimulates R&D efforts in small- and medium-sized enterprises. The cluster uses a mixed financing. Around 50% of the budget comes from public (initial) funding (e.g. EFRE), a 30% originates from private company investments, and 20% is earned through an own marketed product and service portfolio. The Gründungsinitiative Frankfurt HOLM (e.V.) is predominantly financed by an initial funding of the Federal State of Hessen, the City of Frankfurt am Main and 15 private partners. The association furthermore generates income from membership fees. The HOLM is a cooperation platform that provides information about and guidance with funding opportunities, such as research or project programs by the Federal State of Germany, a regional authority, or the European Union. It acts as an agent with research and project proposals. Partners and members have the opportunities to become involved in publicly financed projects or privately funded ventures by business entities or banks present on the platform. Other Rhine-Main cluster platforms, such as the founder’s network “Route 66” by the HOLM Partner University of Applied Science Frankfurt and associates, support young university graduates with their business ideas, among other things in acquiring funding from business contacts or financial institutes.

*Fit between the cluster and the regional economic policy*

Regional priorities are aligned with the historically grown economical, scientific and social situation of the cluster. The logistics- and mobility cluster of Rhine-Main has a several centuries old tradition as market place and interface for important European trade routes. This tradition has to be utilized and expanded towards future endeavours. Mobility and trade flows have always been a vital attribute of the region. The Planungsverband is a representative institution of the Rhine-Main-Region. Aiming at regional development, it has identified 10 future-oriented key-markets or leading clusters. Critical aspects of this vision are logistics and mobility, which continue with the historical core competencies of the region. The state law concerning the regional funding and the path of development to strong regional cooperation in the metropolitan area Frankfurt Rhine-Main ensures that the region has a constant development utilizing regional marketing, funding of economical development as well as regional traffic planning and traffic management. The regional potentials of logistics and mobility shared in scientific and economic institutions are being bundled in one single network HOLM and hence increase productivity and competitiveness of the region. The above-mentioned priorities of regional economic policy are being fully considered and are implemented by the HOLM and the related cluster initiatives. The cluster initiatives jointly bundle the competencies of regional, national, and international partners, both economical and scientific, for logistics and mobility expertise. This process happens under the HOLM brand. Future-oriented knowledge and technologies for logistics and mobility are being supported and, flanked by well aimed location marketing, positioned in the Rhine-Main-Region. Active networks offer access to global know-how, resources and knowledge infrastructure for development and cooperation. The City of Frankfurt and the State of Hessen are initiators and members of the HOLM initiative; hence both are represented in the board of directors and take responsibility in the HOLM governance and in funding HOLM infrastructure. Further regional authorities like Hessenagentur or Planungsverband are members of the advisory council, which is involved in the development of the research strategy. LRM is cofounder and member of the workgroup “logistics-initiatives Germany”. This membership granted the possibility to help developing the master-plan freight traffic and logistics, initiated by the Federal Ministry of Traffic, Construction and Urban Development. Members are e.g. Hamburg, Bremen, NRW or Bavaria. Through the Centre for Cluster and Competitiveness, the HOLM is involved in the European cluster research as part of the EU Cluster Observatory Project.

### Øresund Øresund Logistics

<b>Research Entity</b> <ul style="list-style-type: none"> <li>• Next Generation Innovative Logistics (NGIL)</li> <li>• Lund University / Lund Institute of Technology</li> <li>• Copenhagen Business School</li> <li>• Technical University of Denmark</li> <li>• University of Copenhagen</li> <li>• Roskilde University</li> <li>• Malmö University</li> <li>• Øresund University</li> </ul>	<b>Regional Authority</b> <ul style="list-style-type: none"> <li>• Region Skåne</li> <li>• The Capital Region of Denmark</li> <li>• Region of Zealand</li> <li>• City of Copenhagen</li> <li>• City of Malmö</li> <li>• City of Helsingborg</li> </ul>
<b>Business Entity</b> <ul style="list-style-type: none"> <li>• Alfa Laval</li> <li>• Bring Frigoscandia</li> <li>• DSV Transport</li> <li>• Ericsson</li> <li>• Volvo</li> <li>• Sony Ericsson</li> <li>• Confederation of Danish Industry</li> <li>• 500 companies in the network of Øresund Logistics</li> </ul>	<b>Other Actors</b> <ul style="list-style-type: none"> <li>• Øresund Committee</li> <li>• Danish Technological Institute</li> <li>• Maritime Development Centre of Europe</li> <li>• Femern Belt Logistics Platform</li> <li>• PieP Innovation research cluster</li> <li>• LETS Goods 2050</li> <li>• Øresund EcoMobility</li> <li>• (Danish) Transport Innovation Network</li> <li>• and 5 others</li> </ul>

The cluster is represented by Øresund Logistics in collaboration with Next Generation Innovative Logistics - NGIL (same legal entity) in a close cooperation. Both organisations support the logistics sector in the region and supplement each other. Øresund Logistics is a non-profit cluster initiative which facilitates Swedish and Danish logistics operators and builds on close triple-helix cooperation between 5 universities, 3 regional

authorities and the two main industry organisations in the region. Today the Øresund Logistics network includes about 500 companies. Since 2003 Øresund Logistics has worked as an engine for growth and a catalyst for innovative activities, which include numerous knowledge intensive projects together with companies and universities. NGIL is a VINN Excellence Centre based at Lund University - Lund Institute of Technology providing knowledge, methods, techniques and tools for companies and organizations to increase supply chain visibility and to manage deviation in logistics systems. NGIL unites a long range of members from the industry and from public authorities with three academic divisions at Lund University: Engineering Logistics, Production Management and Packaging Logistics and focuses on the thematic areas of Visibility, Risk and Flexibility.

Øresund Logistics is a part of Øresund Science Region – an umbrella organization and incubator for four triple helix clusters facilitating organizations in the areas of Environment, ICT, Food science and Logistics. Øresund Logistics won the European Commission's RegioStars award in 2008 for "Best Supporting Clusters and Business Network" in the European Union as part of Øresund Science Region.

Apart from knowledge sharing and network activities, Øresund Logistics actively facilitates an open-innovation process for actors in the cluster in order to develop new products, services or projects, which often bridge the gap between research and industry. Through this process, for instance, railway shuttle systems, city logistics services and bio-fuel projects have been established in cooperation between companies and universities. NGIL offers industry driven research through various activities and transfers knowledge to its members. The activities include case studies, workshops, seminars, master thesis, participation in academic work, education activities, newsletters, conferences open to industrial participation, visiting industry research associates and hosting industry PhD students. Øresund Logistics is financed by a mixture of regional and national funding, as well as the 9 member universities of the Øresund University. In addition Øresund Logistics is furthermore financed by a large portfolio of projects which includes both national and regional financing in Denmark and Sweden as well as EU funds. NGIL is financed 70% by VINNOVA (government agency that sponsors research work at universities in Sweden), 20% from industry and 10% from Lund University.

### *Knowledge*

The Øresund Region is highly knowledge intensive. Actors in the cluster include 5 science parks, 2 approved Technological Service companies as well as 9 major universities which account for a total of 150.000 students, 6,500 PhD students and 12.000 researchers. These knowledge institutions offer an extensive portfolio of educations within logistics and conduct research that cover a broad range of thematic areas, such as ICT; mechanics and transport carrier technologies; modelling systems; packaging; Supply Chain Management; city logistics; sustainability and energy carriers. Within Logistics research NGIL plays a central role. Furthermore, the three regional authorities in the Øresund region together with the two main industry organisations and the 9 largest universities have established Øresund Science Region in order to promote knowledge based economic growth in the cluster. Øresund Science Region is a cross border triple-helix cooperation, which includes a specific cluster facilitating platform for the logistics sector (Øresund Logistics).

### *Fit between the cluster and the regional economic policy*

Øresund Logistics cooperates with the three regional authorities in the Øresund Region in order to develop the logistics cluster. This includes identifying issues which are central to address in order to improve competitiveness, as well as to develop concepts and specific projects that can improve conditions within the identified areas. One specific area of cooperation between Øresund Logistics and the regional economic policy makers is the ØRUS, the Øresund Regional Development Strategy. The three regional authorities in the Øresund region have formed the Øresund Committee which also includes 79 municipalities. The Øresund Committee is a political cooperation which provides a strategic framework for the future development of the cross-border region. The Øresund Committee has launched the ØRUS, which sets goals for the development for the region towards 2020. The ØRUS focuses among other things on creating a long term sustainable development and it includes an ambition of becoming a model region within sustainable transport. One of the focus areas is to promote economic growth by creating value from the increasing



amounts of transit transport through the region by e.g. promoting innovative Green Corridor concepts. This is an issue that the Øresund Committee and the participating authorities would like to address through policy initiatives which are developed within the framework of the SoCool@EU project together with Øresund Logistics. At NGIL regional authorities attend dissemination events in order to gain knowledge from the joint research between the university and industry. Furthermore, coordination and collaboration between research actors and the national and the regional economy policy takes place through VINNOVA, the Swedish innovation agency. VINNOVA is active within Regions of Knowledge as well as EIT - KIC activities and other EU programmes which have relation to NGIL's research areas. Øresund Logistics is a neutral triple-helix platform where regional stakeholders can meet and mutually discuss and develop activities which strengthen the cluster. Øresund Logistics functions as a meeting place where knowledge from research is transferred from universities to business and authorities and vice-versa. This takes place through a long range of activities such as workshops, seminars, conferences, reports and projects. By this approach Øresund Logistics facilitates regional policy and acts as an advisor and knowledge provider for various stakeholders in the cluster. Øresund Logistics is at the present involved in facilitating regional strategies within business development, Green Corridors and infrastructure planning.

### **Mersin MTSO - Mersin Chamber of Commerce and Industry**

<b>Research Entity</b> <ul style="list-style-type: none"> <li>• Mersin University</li> <li>• Çağ University</li> <li>• Toros University</li> </ul>	<b>Regional Authority</b> <ul style="list-style-type: none"> <li>• Mersin Governorship</li> <li>• Metropolitan Municipality of Mersin</li> <li>• MTSO</li> <li>• Mersin Chamber of Shipping</li> <li>• State railways</li> </ul>
<b>Business Entity</b> <ul style="list-style-type: none"> <li>• MIP Mersin International Port</li> <li>• Atako Logistics Co.</li> <li>• Intercombi Logistics Co.</li> <li>• Tria Logistics Co.</li> <li>• Önder Gümrük Co.</li> </ul>	<b>Other Actors</b> <ul style="list-style-type: none"> <li>• UND-International Transporters' Association</li> <li>• LODER – Logistics Association</li> <li>• UTIKAD – Freight Forwarders &amp; Logistics Service Providers Associations</li> </ul>

The cluster will be represented by the Mersin Chamber of Commerce and Industry (MTSO). Mersin Logistics Cluster, called "Mersin Logistics Platform", is a voluntary organization established with a mission to overcome and reduce problems of the sector, one of the triggering industries for Mersin and long term road-map of the logistics industry. The platform and its basic cooperation and coordination principles, was established on June 26, 2007 and comprises members from state owned organizations, nongovernmental organizations, and also from private industry. The main objective of the platform is to transform the city into a logistics hub centre appealing to not only in a national scale but also to Middle Eastern countries and Commonwealth of Independent States. Some of the activities and projects of Platform are as follows:

- A short-and mid-run logistic action plan for Mersin has been prepared and put into effect (practice)
- Mersin Logistics Master Plan has been outsourced to and completed by a professional organization
- In order to establish an international logistic centre in Mersin, certain coordinated studies with the Ministry of Industry and Trade have been initiated/started
- A number of reports revealing the present situation of Mersin in logistics have been issued/prepared
- Certain fruitful cooperation has been established with the educational institutions offering education and training in the field of logistics.
- Certain business trips have been arranged in order to analyze certain well-known and established samples for some European logistic cities
- Promotion of logistic investments in Mersin

MTSO has 18.637 members and disposes of Profession Committees of 36 Groups, Council of 82 persons, Administrative Committee of 11 persons, and 8 Services managed with total of 55 staffs.



Tasks of MTSO include registration and cessation procedures in respect of commercial and industrial organizations; determination of capacity of industrial organizations; registration and approval of exports procedures; provision of all other services as may be required by its members; etc. Additionally, MTSO directs industrial and commercial development of the province; conducts studies for integration of the province and its members with the world economy; develops projects in co-ordination with public organizations and NGO's; looks into investment opportunities and informs investors accordingly; conducts sector researches inside and outside the country, as well as studies on the relations with European Union; provides training services in various areas for its members; etc.

Various projects have been offered to domestic and international funding institutions, including:

- RIS Mersin: increase the innovation potential of Mersin in an SME-oriented approach; create a well-functioning regional innovation system with all key actors in order to increase patent applications, spin-offs, employment, etc.
- Entrepreneur 33: raise entrepreneurship of innovative business ideas within the concept of preserving natural resources and sustainable development, and contribute to employment.
- Invest-in-Mersin: realize lobbying activities in public bodies to attract new local and foreign investments.
- Academy Logistics: train 60 young unemployed logistics graduates and provide the opportunity for internships at Mersin Logistics Platform members.

### *Knowledge*

Mersin has three universities with undergraduate and graduate programs as well as scientific research to support regional industrial and commercial development. In recent years, stakeholders responsible for life-long education have devoted much of their effort on trade and logistics by providing learning and training facilities. Trade and logistics programs are maintained at high schools and two-year vocational higher schools in addition to the undergraduate and graduate levels in order to provide skilled employment. In addition, Mersin Chamber of Commerce and Industry, and Mersin Chamber of Shipping carried out some certificate programs and short term training programs. Mersin University, Toros University and Çağ University aim to establish graduate programs on logistics and supply chain management. Students have opportunities to participate to training programs organized by International Transporter's Association (UND) and Ro-Ro Vessel Operators & Combined Transporters' Association (RODER). Once such long-term teaching and training curricula have been prepared and activated, the number of those specialized in international trade and logistics will increase, accelerating the regional progress in these fields.

### *Fit between the cluster and the regional economic policy*

Regional Development Agencies in Turkey are the regional bodies to design the policy papers for economic development. Cukurova Development Agency is the body to cover Adana and Mersin region together. The Mersin logistics sector is noted among the strong sectors in the Cukurova Regional Development Plan. Therefore, the Agency is also represented in the Mersin Logistics Cluster's Management Board. The Mersin Governorship and the Agency are the two major public bodies that mentor the clustering activities in Mersin as a tool to realize the regional economic development plans. The regional economic development plan in Mersin takes its path from the 2006-2016 Mersin Innovation Plans which were carried out as an FP6 Project "RIS-Mersin" completed in 2008. The Mersin Logistics Cluster was also formed in the project and represents the Strategic Goal 3: Exploiting regional potential in key sectors. The strategy puts a specific emphasis on the following sectors which are vital for the economy of Mersin and which have the potential to become more competitive in a shorter period of time through innovation intervention: Tourism, Agro-food and Logistics. To enable these sectors to gain and sustain competitive advantage, the following operational objectives will be reached:

1. Developing long term innovation strategies for each sector
2. Establishing regional, national and global networks, synergies and partnerships
3. Mobilising financial resources for innovation activities of companies
4. Investing in the development of human capital

### *Mersin as mentoring region*

The Mersin region is a major logistics centre in Turkey and its port, transportation and logistics activities give rise to heavy truck traffic and freight movement. Currently, these movements are organized ineffectively and unsustainably, and in Mersin City, growth in all transport modes is inharmonious. This affects the economic and environmental position negatively; traffic congestion, inefficient use of urban space, pollution, etc. In addition to conventional management strategies for efficient handling and movement of goods, the concept of 'green logistics' is applied for efficient use of land, adaptation of environmentally friendly technologies and materials, reduction of emissions, reduction of energy use, reverse logistics and similar efforts. SoCool@EU will provide a substantial contribution to achieving measures of the green logistics concept in Mersin. Sharing experiences and collaboration is the main motivation of the project. In that sense, Mersin Region is eager to adopt know-how that partners have collected. Additional, policies aiming at green logistics, implemented in the world cities can be adapted to partner regions and this innovation oriented logistics cluster. Throughout the project, a research and company audit will be conducted in order to understand adaptation of the policies and systems like environmentally friendly logistics zones/centres; coordinated and multi-modal freight zones; low-emission transport and restricted zones; and time management and delivery schemes. The SoCool@EU consortium will be the main medium of adaption and implementation of such policies and systems in the corresponding regions.

## **B1.2 Contribution to the coordination of high-quality research**

SoCool@EU aims to create a European platform for the logistics and supply chain management sector. This platform can only be realized by a high-level coordination and cooperation between and within regional clusters. As a result, the project will contribute unequivocally to the coordination of high-quality research as well as focused policy and efficient implementation.

### **Importance of the selected regions**

The initial focus of SoCool@EU is on the participating clusters which means that these clusters and their members will contribute to the R&D coordination and cooperation efforts – this is the 'internal effect'. In all participating regions, high ranking research institutes (both universities and other research institutes) collaborate with companies that are knowledge-intensive and invest in R&D themselves and with regional and local authorities that strongly support these initiatives – for example by initiating the creation of innovation parks). However, there is also an 'external effect'. For the project to have contribution at the European level (beyond the regional effect within the participation clusters), the regions involved were carefully selected as they each represent key areas in Europe. The strength of the Rhine-Scheldt Delta lies in the presence of the two largest European sea ports: Rotterdam and Antwerp and the extensive railway and inland waterway connections that link to an extensive northwest European 'hinterland'. Aragón is a major logistical gateway that links the south of Europe to the rest of the world by means of their 'dry port' function. Øresund is a hub for Scandinavia and the Baltic Rim and a gateway connecting the north of Europe, with a great strength in short-sea shipping. Finally, Frankfurt / Rhine-Main in Germany revolves around Frankfurt Airport – the largest airport and airfreight hub in Europe. The mentoring region of Mersin can develop to a linking pin between Europe and the Middle East.

In the future, other European regions can profit from the experiences developed in the clusters: there are various other hubs that are part of the European and global networks that face comparable challenges. The range of activities to be carried out in the framework of the project's work plan will thus have a sufficient broad scope and a strong impact. When drawing up the analysis of (research) agenda's of the relevant stakeholders, this will reflect the state of play within four European key areas, covering all transport modes and associated logistics. When drawing up the Joint Action Plan, the same key areas will benefit from the various measures to be defined to achieve integration, synergies, exchange of best practice, etc.

It must be stressed that the platform to be developed by current consortium partners is ‘merely’ a starting point; it is an open platform accessible for the benefit of each (substantial) logistics cluster in Europe. The role of regions in aligning R&D policies and agenda’s is central – as also underlined in the EU’s Innovation Agenda – and should ultimately have its effects on national and European policy, translated into grant programs like FP7, FP8, TEN-T, Marco Polo and Motorways of the Sea, among others.

### **Contribution of cluster collaborations**

#### ➤ Networking and knowledge-sharing among European regions

SoCool@EU is an instrument that facilitates trans-European cooperation, both between the clusters involved and between the participating cluster members. When it comes to defining regional policy and selecting priorities, regional authorities have to take various considerations into account. These considerations also affect the academic and the industrial world. Considerations include: the types of instruments clusters can apply to promote research and innovation (research subsidies, business participations, regulation, setting up ‘incubators’ for starting business...), the entities involved in research (dedicated organisations, universities, consortia with companies and knowledge institutes), the way research programs are initiated (top down, open calls, industry-demand driven, ...), and the way research funding is allocated. The different clusters within the consortium apply different approaches: this project offers an ideal platform for all partners involved to exchange best practices, learn from experiences in similar situations, circumstances, etc. Additionally, proceedings of this project can be opened up to a wider European audience so that the project cannot only contribute to the project partners but to other external parties as well. This will result in an increased international recognition and a position of leadership towards the rest of the world.

Networking, exchanging best practices, and aligning public and private research policies and agenda’s will contribute directly to a better-coordinated high-level research in Europe.

#### ➤ Addressing needs and weak spots

The first phase of the project focuses on the analysis and integration of the various research and innovation agenda’s of participating clusters. Although the overall research agenda follows from the general aim of making logistics and transport operations more competitive and sustainable, this analysis will highlight the details of specific needs, concerns and weak spots for the different approaches (logistics concepts, technologies, ...) to reach the general aim; all actors should be involved in this analysis. Awareness on the importance of these needs and weak points in both research and innovation, as well as the continuous interaction between key actors in this area, is crucial to the project and will form the basis for development of a Joint Action Plan.

Addressing these needs and weak spots and joint cluster efforts to develop answers and solutions will enhance European coordination of high-level research.

#### ➤ Integrated approach

The transport, logistics and supply chain world has by definition an international character, as is also reflected in the consortium. Various transport modes, an international dimension and a variety of actors and stakeholders involved play an important role and have to be taken into account. Ideally, a coordinated, integrated approach involving all these stakeholders and actors should result in best possible solutions, however, the sheer number of actors and the complexity of their interactions makes the realization of an integrated approach to the challenges faced not obvious. By setting and implementing SoCool@EU, consortium partners attempt to develop an integrated approach starting from (experiences) at a regional scale. SoCool@EU facilitates access to and enables the exchange of knowledge.

By developing an integrated approach to the challenges faced, complementarities can be identified, and new synergies can be created, all for the benefit of increased research coordination in Europe; cooperation

between triple-helix stakeholders can help develop integrated and efficient solutions, while cooperation between clusters/member states can help create synergy and integrate approaches at a European level.

➤ Optimize dissemination of project results

As is demonstrated in WP6, the project cannot have its ultimate impact unless project results and proceedings (approaches) are disseminated. Partners and externals will benefit greatly from the outcome of the analysis, the lessons learned.

A solid dissemination and valorisation plan that will reach a wide trans-European audience will facilitate knowledge transfer and as a consequence contribute to a better coordination of high-level research within Europe.

**Contribution to the coordination of research and innovation in the mentoring region**

In general, the Mersin region is a relatively mature cluster with a clear geographic and trade hub function, both for Turkey and its hinterland countries (EU, Middle-East and CIS). However, the Mersin region has only recently begun to develop itself in the specific area of logistics and supply chain management. The presence of the Mersin Free Trade Zone, existing triple-helix collaborations within the region and a strong partnership with Zaragoza Logistics Centre in the Aragón region, are elements that form a solid basis for Mersin to function as mentoring region and for their further growth in logistics and supply chain management. SoCool@EU will give special attention to this region. The European platform to be developed will be especially significant for Mersin to shape the research agenda and its position within the cluster. The analysis and integration of cluster research agenda's included in the work plan of SoCool@EU will contribute directly to the RTD policy development and to the development, transfer and coordination of knowledge Mersin region. To solidify the role of the project to the mentoring region, guidelines will be drawn up for the Mersin region – and other less developed clusters – that will include information on best practices, lessons learnt, discussions within the project, exchange of models to optimize research potential and infrastructures in Europe by enhancing staff exchange programs and sharing resources, etc.

**Example 1**

*The Region of Aragón is currently considering creating a Technology Park within the areas of Logistics and ICT, using the existing facilities of Aragón (PLAZA, the research entities, etc.). Such a Park would represent an opportunity for the region since it could attract many private companies that could be the consumers of the technology created within the area of logistics. In this case it would be a booster of the Aragonese economy. This project would put an even higher emphasis to the already existing priority of the region of Aragón within the field of sustainable logistics which would provide the Region with another reason for opting for the creation of the Technology Park. Also, the project would be the perfect opportunity to learn from other regions about best practices, sustainability and successful activities that have been carried out in other advanced countries. This would offer the cluster the opportunity to improve its logistics activities and thereby boost the economical activities within this field.*

**Example 2**

*The HOLM works together with its partners on innovative and future-oriented projects, knowledge and research results that are practically relevant for business entities, science and authorities. It concentrates on research and development activities in the respective fields of interest of the project partners and in the guiding topic areas of "integration", "sustainability" and "security". Through focus events and cluster integration activities, it markets the Rhine-Main competencies and multiplies the strength and potentials of the cluster. It improves the links between regional authorities, legal entities conducting research and the local business community. Bundling cluster actors and so representing the cluster, the HOLM will establish itself as the means to foster the trans-national cooperation between research-driven clusters. It supports the internationalization of the cluster by demonstrating the regional expertise in logistics and transport to the international community and acts as a role model for other regions in Germany and abroad.*

## B1.3 S&T methodology and associated work plan

### i) Overall strategy of the work plan

From an overarching perspective, the work plan as a whole has been designated to realise a sustainable Joint Action Plan (JAP) that will support innovation and research policies in transport and logistics, in the years to come. In the scheme above all work packages of SoCool@EU are shown in blue. SoCool@EU will result in the implementation of the JAP (green) which will mostly be financed through other means than this Regions of Knowledge project. Strictly speaking these activities are closely related to the project, but are not part of it.

Work package 2 is the starting point in which the necessary information will be gathered as a basis for this JAP. WP2 will focus on **mapping the research agenda's and the actors involved**. The output will feed into Work packages 3, 5 and 6. For WP3, the analysis results will be the input to start **defining the JAP**; elements of the output from WP1 can already be used for the purpose of knowledge exchange with the mentoring region. To underline the importance of dissemination in SoCool@EU, project results will be disseminated as early as possible within the project. Preliminary results will be distributed internally; the external focus will increase as the project evolves.

Work package 4 will elaborate on **concrete supporting measures** for the implementation of the JAP. As commented above most of the implementation of the JAP will not be part of SoCool@EU itself, but of regional, national and EC RTD programs. The experiences gained in the implementation of the JAP will again feed into WP5 to **support the mentoring region**, as well as WP6 for **dissemination and valorisation of results**.

Work package 1 is the overall Project Management WP that will ensure a solid communication protocol, decision-making procedures, meeting schedules, etc. to monitor progress.



## ii) Timing of the WPs (Gantt chart)

		Year 1												Year 2												Year 3												
		1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	
WP1: Project Management																																						
	1.1 Set up PM team, AB, distribution of tasks/responsibilities																																					
	1.2 Set up communication system																																					
	1.3 Organize meetings																																					
	1.4 Distribution of funds																																					
	1.5 Set up financial planning system																																					
	1.6 Reporting to the EC																																					
WP2: Analysis and integration of research agenda's of actors in regional clusters																																						
	2.1 Statistical analysis state of play																																					
	2.2 Online questionnaire																																					
	2.3 Cluster expert interviews																																					
	2.4 Meta analysis																																					
WP3: Initiatives to improve integration: definition of a Joint Action Plan																																						
	3.1 Cluster conference and workshop																																					
	3.2 Development of Joint Action Plan																																					
	3.3 Business Plan																																					
	3.4 Platform concept																																					
WP4: Measures towards the implementation of a Joint Action Plan																																						
	4.1 Stakeholder identification																																					
	4.2 Knowledge exchange / cooperation																																					
	4.3 Development/definition of joint projects																																					
WP5: Support activities relating to mentoring																																						
	5.1 Needs analysis mentoring region																																					
	5.2 Initiatives to implement mentoring activities																																					
	5.3 Set up accessible platform for mentoring region																																					
	5.4 Company audits / seminars																																					
WP6: Dissemination and valorisation																																						
	6.1 Definition dissemination strategy																																					
	6.2 Dissemination tools/channels																																					
	6.3 Establishment/reinforcement relations policymakers, EC, etc.																																					
	6.4 Set up user groups																																					
	6.5 Seminars, courses, conferences																																					
6.6 Collaboration with cluster-related projects																																						





### iii) Detailed work description

#### 1.3a List of work packages

WP no.	WP Title	Type of activity	Lead participant no.	Lead participant short name	Person months	Start month	End month
1	Project management	MGT	1	DIALOG	43	1	36
2	Analysis and integration of research agenda's of actors in regional clusters	OTHER	2	HOLM	98	1	9
3	Initiatives to improve integration: definition of a Joint Action Plan	OTHER	2	HOLM	62	10	18
4	Measures towards the implementation of a Joint Action Plan	OTHER	4	Øresund Logistics	85	12	36
5	Support activities relating to mentoring	OTHER	5	MERSIN	37	6	36
6	Dissemination and Valorisation	OTHER	3	ALIA	46	1	36
TOTAL					371		

#### 1.3b List of deliverables

Del. no.	Deliverable name	WP no.	Nature	Dissemination level	Delivery date
D1.1	Management Team and Advisory Board	1	O	PU	M1
D1.2	Kick-off meeting minutes	1	R	RE	M1
D1.3	Miscellaneous project meeting minutes	1	R	RE	M1-36
D1.4	Communication system	1	O	CO	M2
D1.5	Financial planning system	1	O	CO	M2
D1.6	Progress and final reports EC	1	R	RE	M12,24,36
D2.1	Cluster data gathering tools	2	O	PU	M1
D2.2	First cluster reports based on data collected and processed	2	R	PP	M7
D2.3	Interpreted/validated data (workshop)	2	R	RE	M8
D2.4	End report	2	R	PU	M9
D2.5	Analysis 'toolset' for other clusters	2	R	PU	M9
D3.1	Cluster conference proceedings	3	R	PP	M10
D3.2	Joint Action Plan	3	R	PP	M13
D3.3	Business Plan	3	R	PP	M16
D3.4	Platform concept	3	O	PP	M18
D4.1	Overview of stakeholders identified	4	R	CO	M16
D4.2	Knowledge exchange activities	4	O	CO	M13-36
D4.3	Portfolio of activities to implement JAP	4	R	CO	M18-36
D4.4	Implementation plan JAP	4	O	PP	M18
D5.1	Needs analysis / SWOT report	5	R	PU	M12
D5.2	Dissemination plan	5	R	PU	M14
D5.3	Accessible platform for mentoring region	5	O	PU	M24
D5.4	Company audits / seminars	5	O	PP	M15
D5.5	Awareness raising activities	5	O	PU	M13-36



D6.1	Dissemination plan	6	R	CO	M2
D6.2	Online web-portal and email address	6	O	PU	M5
D6.3	Seminars	6	O	PU	M6,12,18
D6.4	Executive course	6	O	PU	M8,13,18,24,28
D6.5	Final SoCool@EU conference	6	O	PU	M36
D6.6	SoCool@EU PR materials (brochure, video, CD-Rom)	6	P	PU	M4,34
D6.7	Dissemination report	6	P	PP	M12,24,30
D6.8	Advisory Board proceedings	6	P	CO	M6,12,18,24,30

### 1.3c List of milestones

Milestone no.	Milestone name	WPs involved	Expected date	Means of verification
M1.1	Kick-off meeting and establishment of project teams & Advisory Board	1	M1	Meeting report available
M1.2	Communication and financial plans defined	1	M2	Plans are distributed
M2.1	Stakeholder needs identified	2	M6	Interim WP review meeting
M2.2	Analysis and integration of research agenda's completed	2	M9	Availability of RTD Directory, SWOT analysis and toolset
M3.1	Joint Action Plan outlined	3, 4	M18	JAP available and distributed
M3.2	Mentoring activities identified	3, 5	M14	Integration in JAP
M3.3	Dissemination activities defined	3, 6	M18	Integration in JAP, validation by Advisory Board, integration in Dissemination Plan
M4.1	Key stakeholders identified	4, 5	M16	Overview of stakeholders distributed within consortium
M4.2	Joint projects identified	4, 5	M13	New collaborations initiated; start-up of joint grant proposals
M5.1	SWOT analysis completed	5	M12	Report
M5.2	Access to mentoring region platform	5	M8	Statistics on virtual and physical visits and contacts
M5.3	Effective awareness-raising activities	5, 6	M36	Statistics on materials distributed, contacts and visits realized
M6.1	Dissemination channels identified and developed	5, 6	M13	Overview of available dissemination channels, validated by Advisory Board
M6.2	User groups set-up	6	M6	Validation by Advisory Board

**1.3d Description of each WP**

Work package number: 1						Start date or starting event: M1					
Work package title: Project Management											
Activity type: MGT											
Participant number:		1		2		3		4		5	
Participant short name:		Dinalog		HOLM		ALIA		Øresund		MTSO	
Person month per participant:		43									

**Objectives**

- Establishing and leading the management team
- Scientific and administrative monitoring and reporting
- Financial administration

**Description of work**

**Task 1.1:** establishing the project management team as well as an advisory board which will consist of a central project manager and representatives of each participating cluster. This tasks includes the distribution of project tasks and responsibilities

**Task 1.2:** set up an effective communication system between the management team and the project participants, as well as between the clusters and participants involved.

**Task 1.3:** organise the kick-off meetings and other periodic meetings and events

**Task 1.4:** distribution of funds to consortium partners in accordance with the financial arrangements made

**Task 1.5:** set up a budgeting and financial planning system

**Task 1.6:** administrative, content and financial reporting to the European Commission

Dinalog as project coordinator will be in charge of this WP; other consortium members will invest a limited budget in local project management-related activities.

**Deliverables**

D1.1 Management team and Advisory Board (M1)

D1.2 Kick-off meeting minutes (M1)

D1.3 Miscellaneous project meeting minutes (M1-36)

D1.4 Communication system (M2)

D1.5 Financial planning system (M2)

D1.6 Progress and final reports to the European Commission (M12, M24, M36)

Work package number:		2		Start date or starting event:		1					
Work package title:		Analysis and integration of research agenda’s of actors in regional clusters									
Activity type:		OTHER									
Participant number:		1		2		3		4		5	
Participant short name:		Dinalog		HOLM		ALIA		Øresund		MTSO	
Person month per participant:		15		36		16		13		18	

**Objectives**

- Detailed overview of the state of play per cluster.
- Identification of stakeholder needs.
- Identification of synergies and opportunities for all clusters and partners involved.
- International cooperation strategy.
- Identify benchmarks and weaknesses which can be used for dissemination and mentoring across

## Europe.

### Description of work

#### Task 2.1: Statistical Analysis

Perform a detailed analysis of the state of play of the identified research-driven clusters, of the state of the art of relevant research beyond the clusters, and of additional regional capabilities around which research could be carried out, based on the CCC methodology (Centre for Cluster and Competitiveness, used by HOLM). The analysis shall involve the following elements:

- Cluster mapping including official demarcation and definition of the logistics clusters on NUTS 2 level (cluster identification; regional, national employment share; and dynamics)
- Definition of cluster indicators (e.g. economic and innovation power, company foundation dynamics, science and qualification; if applicable!)
- International comparison with other European metropolitan areas in the European Cluster Observatory
- Data analysis and data presentation according to Clusters of Innovation Initiative and analysis of the Rhine-Main logistics cluster
- HOLM with its subcontracting party, the Centre for Cluster and Competitiveness (CCC) institutionalized at the Supply Chain Management Institute (SMI) at the EBS Business School, defines and analyses the data (using among other things Eurostat), the other clusters complement the data with input from national databases

#### Task 2.2: Construction of an Online-Questionnaire

- Construction of a questionnaire on the competitive situation in the clusters, the state of research and development projects and the identification of future topics and projects to connect the clusters (basis questionnaire of the Global Competitiveness Report, Cluster of Innovation Initiative)
- Pre-test with feedback rounds on the plausibility, understandability and functionality
- Approx. 500 respondents per cluster envisioned (from science, economy including SMEs, and politics)
- Data analysis and data presentation according to Clusters of Innovation Initiative and SMI/CCC analysis of the creative industries in Rhine-Main
- The HOLM (SMI/CCC) constructs first draft of questionnaire and pilots it with the help of the other clusters in their respective regions; the final version of the questionnaire will be drafted by HOLM (SMI/CCC) and locally translated and channelled by the clusters in the consortium.

#### Task 2.3: Cluster Expert Interviews

- Construction of an interview concept sheet (in line with online-questionnaire; basis Clusters of Innovation Initiative)
- Pre-Test with selected industry leaders in the clusters (science, economy, public bodies)
- Telephone interviews with logistics cluster experts and with managers and project developers of cluster initiatives and organizations
- Data analysis and data presentation in line with the Cluster Initiative Green Book
- Data helps to understand the potentials, the challenges and the trends in the respective logistics and transport clusters
- The HOLM (SMI/CCC) constructs first draft of interview guidelines/questions and pilots them with the help of the other clusters in their respective regions; the final version of the interview will be drafted by HOLM (SMI/CCC) and locally translated and implemented by the clusters in the consortium giving protocols and reporting to the HOLM (SMI/CCC).

#### Task 2.4: Meta Analysis

- Construction of cluster templates for the codification of cluster data and information (according to Cluster Templates of the Harvard Business School and the analysis of the creative industry in Rhine-Main)
- Data collection and research on regional documents (e.g. studies, reports, brochures, data bases,

websites, articles etc.)

- Data analysis and data presentation according to Harvard Business School Cluster Mapping Project
- HOLM (SMI/CCC) conducts meta analysis receiving input (documents, information, current and future developments) from the clusters in the consortium

#### Task 2.5: Interpretation and Verification of Collected Data

- After surveying and collecting data through Tasks 2.1 to 2.4 the HOLM (SMI/CCC) will process the data and compile a respective report on the clusters and compared to other clusters in the consortium and Europe. Results treat the competitiveness of the clusters and the identified needs for action.
- Every cluster holds workshops and conducts detailed discussions on the basis of their cluster report (interpretation, verification of data).
- HOLM will prepare a final report which will function as a basis for a Joint Action Plan, to be elaborated after a cluster conference and sessions to develop new topics from the identified needs for action (see WP3).

HOLM is experienced in cluster analysis of available capacities and capabilities. They will coordinate this work package and devote the majority of resources to the implementation of this work. Other partners will each have a roughly equal role in identifying, gathering and analysing the necessary data, exploring opportunities and preparing the cooperation strategy.

#### Deliverables

- D2.1 Cluster data gathering tools (questionnaire, interview thread, statistical data) to be raised by month 2 for implementation (incl. pre-test) (M1)
- D2.2 First cluster reports based on data collected and processed (M7)
- D2.3 Cluster workshops for interpretation/validation of data (M8)
- D2.4 End report (M9)
- D2.5 Analysis 'toolset' for other clusters (M9)

Work package number:		3	Start date or starting event:		M10
Work package title:		Initiatives to improve integration: definition of a Joint Action Plan			
Activity type:		OTHER			
Participant number:	1	2	3	4	5
Participant short name:	Dinalog	HOLM	ALIA	Øresund	MTSO
Person month per participant:	8	22	9	7	16

#### Objectives

- Definition of a Joint Action Plan
- Definition of a Business Plan (incl. identification of funding sources for the JAP)
- Development of a long-term international cooperation strategy on a platform structure

#### Description of work

##### Task 3.1: Cluster Conference and Workshops

A cluster conference will present the central findings from the analysis and the cluster report. The cluster partners and HOLM (SMI/CCC) will go into moderated workshops for discussion and definition of topics along with possible activities to achieve the objectives. HOLM (SMI/CCC) and the partners will filter and process the results and will so lay the foundation for the formulation of a Joint Action Plan.

##### Task 3.2.: Development of a Joint Action Plan (JAP)

Based on Task 3.1 HOLM (SMI/CCC) defines together with the input from the partners a Joint Action Plan describing the overall strategy to drive sustainable economic development through research and

technological development and innovation activities in the identified research project portfolios. In line with the EU 2020 goals of Smart, Sustainable, and Inclusive Growth, the JAP will predictably address the design of:

- Processes, that is e.g., environmentally friendly value chain design, efficient HUB operations, efficient HUB and Hinterland connections, modal shift potentials in the total European transport network, and intermodal security concepts
- Technology, that is e.g., intelligent supply chain management, intelligent transport networks, harmonised information services, and electronic interfaces to other modes of transport
- Standards, that is e.g., project- and partner catalogues, measuring and evaluating sustainability, security standards
- Education projects, that is e.g., a joint learning platform, joint learning programs, etc.
- Cluster management activities

### Task 3.3: Business Plan

Based on the previous tasks in the work package, this activity develops the JAP into a Business Plan with its long-term objectives, project milestones and activities, and funding sources. HOLM (SMI/CCC) will write the Business Plan with the support of the clusters.

### Task 3.4: Platform Concept

A long-term international cooperation strategy and structure will be developed by all participants, with the identification of potential targeted clusters from third countries and of cooperation possibilities in RTD and innovation support services with these clusters. It shall be made with the involvement of local stakeholders concerned as part of the consensus building and dissemination processes around the project. Long-term result of this cooperation strategy is an open, international logistics cluster platform (including cluster event series) that helps improving and sharing RTD infrastructure and other facilities, enhancing skills and knowledge transfer (including technology transfer and intellectual property management) between business entities and between research entities and business entities, in particular SMEs, through networking. It also improves the availability of, and access to, SME and innovation support services, including the facilities provided under Europe INNOVA and facilitates the access to private and/or public funding for RTD and innovation. The platform can act as input supplier for European regional (cluster) policy programs.

### Deliverables

- D3.1 Cluster conference proceedings (M10)
- D3.2 Joint Action Plan (M13)
- D3.3 Business Plan (M16)
- D3.4 Platform concept (M18)

Work package number:		4	Start date or starting event:		12
Work package title:		Measures towards the implementation of a Joint Action Plan			
Activity type:		OTHER			
Participant number:	1	2	3	4	5
Participant short name:	Dinalog	HOLM	ALIA	Øresund	MTSO
Person month per participant:	12	17	19	23	14

### Objectives

- Implementation of the Joint Action Plan

### Description of work

**Task 4.1:** Identification of key stakeholders and establishment of network cooperation's in order to





facilitate implementation of JAP. Key stakeholders include European Cluster and Regions Initiatives, general networks in the clusters, national and international research and innovation cooperation as well as relevant projects. Among the relevant stakeholders are European Cluster Alliance, the European Club of Clusters Managers and the European Innovation Platform for Clusters.

**Task 4.2:** Knowledge exchange and cooperation between triple-helix members of the clusters and between clusters in order to facilitate implementation of JAP

- To organize workshops, seminars, conferences and network events within and between clusters
- Outplacement of executives of the clusters' boards or management structure
- Setting up a knowledge exchange environment for the cluster members
- Short courses , conferences and other dissemination activities in order to create a general consensus among the clusters which facilitates implementing the JAP

**Task 4.3:** Development and definition of joint research, training and innovative projects within and between the clusters (builds on WP3.1). Includes the following activities:

- Identify key areas to be addressed by JAP
- Clarify which stakeholders in the clusters that have cores competencies within the identified key areas and establish consortia for the activities.
- Brainstorming and development of concepts for activities which can facilitate implementing the JAP jointly with the central stakeholders and the established consortia.

**Task 4.4:** Implementation plan of JAP – identification and development of measures and methods

- Best practice within funding of innovation activities in clusters
- Methods and measures for triple-helix knowledge sharing and cooperation within and between clusters in order to promote research based regional development and innovation.
- Measures towards matchmaking between industry and research
- Options within joint recruitment campaigns for staff
- Development of implementation plan for JAP which facilitates the establishment of a permanent platform of EU excellence for research-driven clusters

#### Deliverables

D4.1 Overview of key stakeholders and establishment of network alliances (M16)  
D4.2 Knowledge exchange activities to facilitate JAP implementation (M13-36)  
D4.3 Portfolio of activities to implement JAP (M18-36)  
D4.4 Implementation plan for JAP (M18)

Work package number:		5		Start date or starting event:		6	
Work package title:		Support activities relating to mentoring					
Activity type:		OTHER					
Participant number:		1	2	3	4	5	
Participant short name:		Dinalog	HOLM	ALIA	Øresund	Mersin	
Person month per participant:		3	5	13	2	14	

#### Objectives

- Provide the mentoring region with an exchange platform to help them enrich their knowledge basis, and create and reinforce transnational relationships.
- Equip the mentoring region with tools and methods to contribute to an efficient and sustainable transport-related economy.

This task is intended for the implementation of mentoring actions towards a less developed region from a two-level approach:

- mentoring on decision makers and public organisations
- mentoring on SMEs: dissemination of opportunities for R&D project development using regional and EU funding schemes, use of knowledge and technology transfer tools and participation in targeted events, promotional events for the creation of SME.

### Description of work

**Task 5.1:** perform a needs analysis to identify the strengths and weaknesses of the mentoring region, focusing on:

- lack of policy strategies
- lack of SME groupings
- SME needs for life-long learning
- existing demands with respect to management of logistics
- R&D needs for tools and systems, for sustainable issues, and for safety
- analysis of 'worst practice' cases

**Task 5.2:** initiatives to implement mentoring actions directed towards two target groups:

- mentoring business: exchange opportunities for R&D project development using e.g. regional/national and European grants, application of tools to transfer knowledge, participation in targeted promotional events, etc.
- decision makers in public organizations: visits from and to the Mersin region to teach, share experiences and disseminate best practices

**Task 5.3:** set up an accessible platform for the mentoring region. Disseminate best practices on:

- regional policies investing in logistic platforms and mobility infrastructures
- regional policy models for financing research and innovation particularly
- cluster models for SMEs
- internal company management of logistics in the supply chain
- available technology for tools and systems for sustainable mobility
- Life-long learning programs on Logistics.

**Task 5.4:** organization of company audits and at least two seminars by Mersin, order to identify problems and develop policies

**Task 5.5:** setting up awareness-raising activities on the concept of 'green logistics': publication of project newsletters, guidebooks and press releases to inform stakeholders, target groups and general public.

MTSO -as the SoCool@EU mentoring region- is the WP Leader and will carry out the bulk of the work within this WP, in close collaboration with the other consortium members. These will each contribute to the definition and setting up of the mentoring activities and platform. Company audits and several dissemination events will be held in Mersin order to identify problems and develop policies. This will ensure an awareness rising in the region for both companies and public institutions. In this sense awareness rising and dissemination activities will have noticeable impacts on understanding and implementation of best practices within transport and logistics services. The project staff of MTSO will follow and participate in the planning of the activities, discussions and meetings. Also, the project team will follow the implementation process and adopt the process to the Mersin Region. Therefore, the region will follow discussions, policy making process, planning and implementation process, and be involved in dissemination activities.

### Deliverables

- D5.1 Needs analysis / SWOT report (M12)
- D5.2 Dissemination plan (M14)

- D5.3 Accessible platform for mentoring region (M24)
- D5.4 Company audits / seminars
- D5.5 Awareness raising activities: e.g. SoCool@EU Newsletter (biannual 5 volumes), SoCool@EU Guidebook for Green Logistics

Work package number:		6		Start date or starting event:		1	
Work package title:		Dissemination and valorisation					
Activity type:		OTHER					
Participant number:		1	2	3	4	5	
Participant short name:		Dinalog	HOLM	ALIA	Øresund	MTSO	
Person month per participant:		5	7	19	5	10	

### Objectives

This work package will make an inventory of available dissemination channels and target groups and analyse the channels and tools currently used within and between clusters. It will focus on reaching stakeholders that are as yet external to the consortium and target groups will include private and public professionals, politicians, general public in the region, etc. Continuous dissemination activities will be carried out throughout the project duration, via the channels determined in the inventory.

The specific objectives are:

- Definition of strategy for dissemination of project results.
- Awareness creation within and beyond the clusters involved, of the project and the JAP.
- Establish and reinforce relations with decision makers, with the industry, and with press and mass-media.
- Validate newly generated knowledge and translate excellent research and ideas into practice, resulting in innovation that can be applied in the market.
- Guarantee collaboration and involvement in European cluster initiatives such as the, European Cluster Alliance, the European Cluster Excellence Initiative, the European Innovation Platform for Clusters (Cluster-IP), and the European Cluster Observatory.
- Foster transnational cooperation between regional research-driven clusters in the areas of logistics and supply chain management.
- Provide a specific platform to facilitate and stimulate the dialogue for the development of skills and knowledge

### Description of work

#### Task 6.1: Definition of the strategy for dissemination of project results.

The consortium will draw up a detailed dissemination plan, outlining the various tasks and responsibilities.

#### Task 6.2: Development of new and dedicated dissemination tools and channels.

The consortium will fortify their identity to the external world in the form of a common name and logo. Also, the creation of a project website will be considered as an important channel for the distribution of the information of the project. In addition, it will serve as an internal work tool. Furthermore, dissemination material such as a brochure, newsletter, poster, CD-ROM, video, will also be created. In addition, press releases will be distributed to the mass media.

#### Task 6.3: Establishment and reinforcement of the relations with decision makers, the industry, and the European Commission.

Each regional cluster has networking contacts that will be considered as crucial for widespread dissemination of excellence and knowledge, not only in Europe but also beyond. Other valuable sources of dissemination channels will also be represented by the members of the Advisory Board.

#### Task 6.4: Setting up a user group per region.

In addition to the external advisory board, the group of active project participants outside consortium members will be expanded with user groups to ensure user involvement and input, targeted validation of project results and a wide impact.

#### Task 6.5: Seminars, executive courses and closing conferences.

Several project events will be organized throughout the duration of the project. Also, the consortium members will participate in external events in order to present the activities of the project.

#### Task 6.6: Collaboration with and involvement in the cluster related projects and initiatives, launched by the European Commission.

These initiatives aim at the improvement of cluster policy within Europe and improving the efficiency of existing efforts in cluster management. The project consortium will participate, among others, in the European Cluster Alliance, the European Cluster Excellence Initiative, the European Innovation Platform for Clusters (Cluster-IP) and the European Club of Clusters Managers as an additional support to the dissemination of the project results and implementation of the Joint Action Plan in the future.

Detailed information about these activities can be found in section 3.2.1.

Disposing of a large network, ALIA is knowledgeable in setting up and coordinating this WP. Project partners will each be involved in the definition and implementation of the various subtasks outlined.

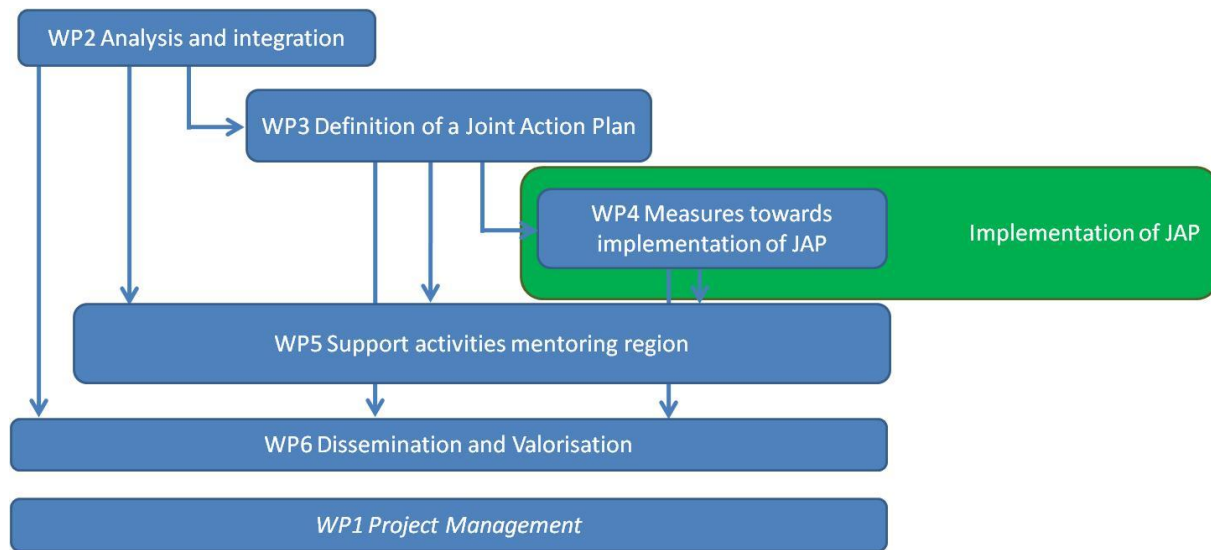
#### Deliverables

- D6.1 Dissemination plan, incl. product roll-out and allocation of resources (M2)
- D6.2 Operational online web-portal and e-mail address for public use and external communication (M5)
- D6.3 Interactive seminars, aimed at regional/European stakeholder participation (M6, M12, M18)
- D6.4 Executive Course for industrial participation (M8, M13, M18, M24, M28)
- D6.5 Final SoCool@EU Conference aiming at high-level participation (M36)
- D6.6 SoCool@EU PR materials incl. multi-language brochure for the life-cycle of the project (M4), multi-language video presenting the project objectives and results (M34) and multimedia collection, promotional materials and findings (M34)
- D6.7 Dissemination report, indicating all promotional and dissemination activities, channels and media (M12, M24, M30)
- D6.8 Advisory Board Proceedings, including meeting minutes (M6, M12, M18, M24, M30)

#### 1.3e Summary effort table

Participant no./short name	WP1	WP2	WP3	WP4	WP5	WP6	Total person months
1. Dinalog	43	15	8	12	3	5	86
2. HOLM	0	36	22	17	5	7	87
3. ALIA	0	16	9	19	13	19	76
4. Øresund	0	13	7	23	2	5	50
5. MTSO	0	18	16	14	14	10	72

#### iv) Pert diagram



#### v) Risks and contingency plans

The target group within the project is quite extensive. The five cluster coordinators are not only responsible for communication and coordination amongst them, but also for communication and coordination with the various participants and stakeholders within their own cluster. The size of this ‘enhanced’ consortium may therefore generate challenges in the overall management and communication. Within WP1, a communication plan will be drawn up to anticipate such issues and to which each cluster will subscribe. Additionally, periodic consortium and/or work package meetings will also serve the purpose of monitoring communication and coordination.

With respect to delivery of the necessary information by various actors to the WP Leaders, delays can occur which may affect the course of the project. This will be anticipated by sending out draft versions of reports well in advance of the relevant deadline(s) and strict coordination by the PM in respecting such deadlines. Also, data can be missing in the analysis because of confidentiality, NDA agreements or availability issues and difficulties may arise in comparing data on different aggregate or content levels. In response to this, when performing the analysis, HOLM will opt for diversified data, that is, different sources, indicators, and aggregate level.

To counter any possible language difficulties, that could render the English questionnaire insufficiently understandable for every European cluster actor, HOLM intends to locally translate the questionnaire (equally the expert interview thread) and will convince cluster actors to participate.

To minimize the risk of project events attracting insufficient interest, partners will combine these events with existing, broader regional events. This will ensure a maximum fall-on effect.

## B2. Implementation

### B2.1 Management structure and procedures

The project includes regional clusters, formed by research centres, companies and regional authorities, from different countries. This diversity requires a special attention to the management and inter-group coordination activities in order to devise an organization that meets overall objectives of the project, with the right balance between rigor and flexibility. Special care has been given to the communication within the regional clusters and well as within the project consortium in order to insure a maximum consistency and

solidity to the project. Also, every work package, as is stated in section 1.3 has a very clear role and clear relationship with the others and with no doubt this will pave the way to, and ease, the management activities.

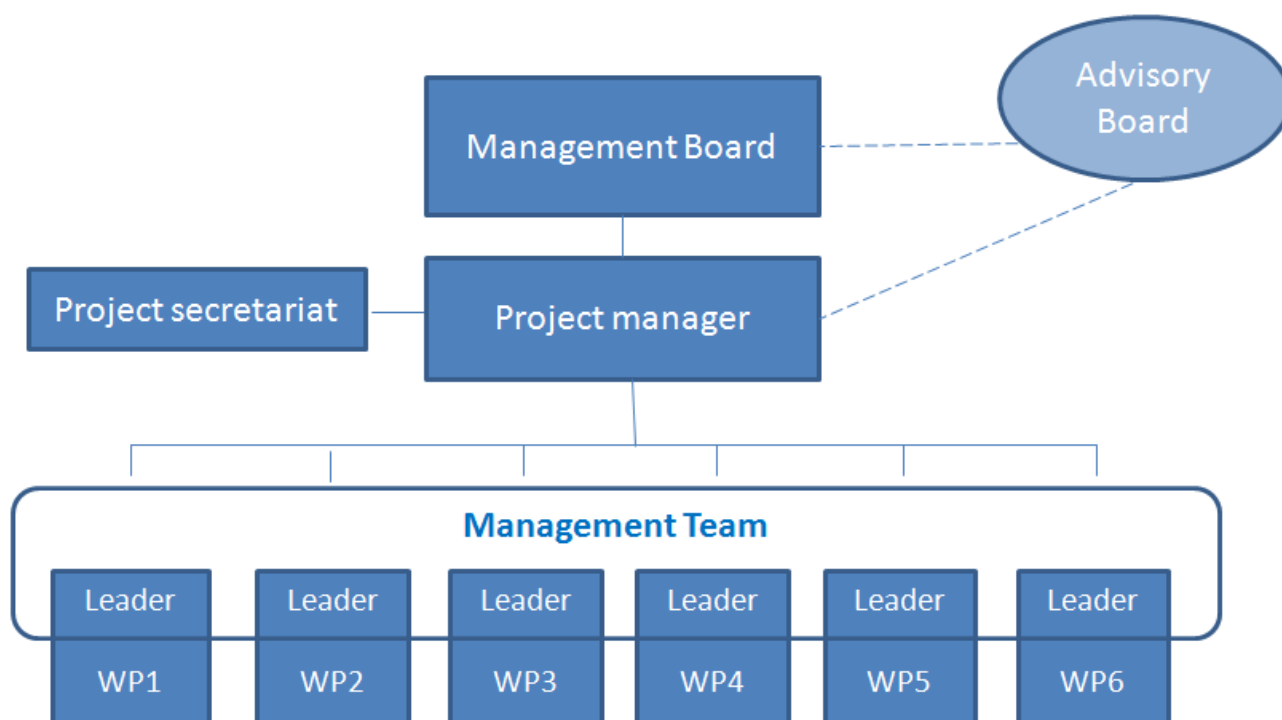
Key features for successful project management are:

- Management organization matched to the project complexity.
- Efficient communication within the organization.
- Clear definition of contractual requirements and relationship.
- Adequate planning and control.

### Management structure and procedures

Project Coordination and management encompasses the following responsibilities: project administration, project organisation, monitoring of progress at the WP, task and activity level coordination with other EU funded projects and other interested parties. Regional coordinators as representatives of the clusters involved, share the additional responsibility of coordinating the contributions of all regional stakeholders. The management of the project is structured in such a way in order to allow the project to address issues swiftly and effectively. The key roles in the project management structure are the following:

- Project Management Board
- Project Manager
- Project secretariat
- Advisory Board
- Management Team (MT) – Work Package Leaders



The structure of the project and the consortium is already quite complex, as so many actors from different fields are represented and to be taken into account. Therefore, the management structure chosen for this project is relatively transparent but very importantly; it is consistent in the composition of the various boards and leadership tasks. Each cluster and/or actor is represented in the necessary structures. The consortium feels that additional boards and subdivisions would not contribute to the effectiveness of the management structure chosen.

### Roles and responsibilities

The clear separation of roles, responsibilities and jurisdiction between the different management entities is mandated for the successful management and coordination of the project.



The **Management Board (MB)** will be composed of the five regional representatives, each from one cluster. The MB is in charge of all strategic and managerial decisions and they will physically meet twice a year. Additionally, conference calls will be set up on an ad-hoc basis to discuss specific issues when necessary. MB members also remain in contact via email and telephone.

Ing. A. van Binsbergen of Dinalog will be appointed as **Project Manager (PM)** to execute the decisions made by the MB and to handle the day-to-day management of the project. The PM is in continuous contact with both the MB and the WP leaders to ensure a smooth management and coordination of the project. Also, the PM will be in charge of the coordination of other stakeholders interested in the So-Cool@EU project and the open platform. The PM and MB will be supported by the **Project Secretariat**.

The various WP leaders will form the **Management Team (MT)**. This team, together with the Project Manager (PM) will be responsible for the coordination and implementation of the work packages. They are in frequent contact with the PM and the MB. The MT will meet on a quarterly basis but will remain in close contact via email and telephone on an ad-hoc basis.

An **Advisory Board (AB)** consisting of potential end-users and experts in cluster management, Logistics and Supply Chain Management fields will be assembled. Its objective is to provide feedback and expert advice to the Project Management Board providing inputs, advices or assessment for the project work in relation to their competences and capabilities. Some entities have already confirmed their participation in the advisory board; others have been contacted or are part of the partners' contact network. The role of the AB (as an independent body) is to validate the project outcomes and to provide the project with relevant feedback. It is anticipated the AB will meet at least 4 times during the lifetime of SoCool@EU. A meeting schedule will be set at the start of the project. The meetings will be organised in conjunction to the project events in order to optimise resources and keep travel cost at the minimum and will facilitate the discussion on the project development and results between the members of the AB and the SoCool@EU core members. The requirements from the Advisory Board will be fully taken into account.

Furthermore the AB can be consulted by the MB in case there is a need for an advice and brain storming sessions may be organised via phone/video conferences in conjunction with important milestones of the projects, in order to keep a constant communication flow with the Board and keep them constantly updated on project developments.

The AB will consist of representatives from the triple helix and will play an important role when it comes to optimizing the impact of the project outside the scope of the consortium.

#### Members of the Advisory Board

Name	Position
<b>Andre Toet</b>	Director Strategy Port of Rotterdam
<b>Peter Schmitz<sup>4</sup></b>	Chief Operation Officer, Fraport (airport operator in Frankfurt)
<b>Mats Boll</b>	Transport Policy Director at Volvo AB and Swedish board member in CSCMP - Council of Supply Chain Management Professionals
<b>Jozef Atat<sup>3</sup></b>	CEO of Atako Logistics and President of Mersin Logistics Platform.
<b>Wando Boeve<sup>3</sup></b>	Director Marketing and Sales ECT, chair Board of EIRAC, member board of Dinalog
<b>Richard Tuffs</b>	Director ERRIN – European Regions Research and Innovation Network
<b>Prof. Dr. Christian Ketels<sup>3</sup></b>	Member of the Harvard Business School Faculty at Professor Michael E. Porter's Institute for Strategy and Competitiveness
<b>Miguel Angel Romeo Marco</b>	Chief Operations WP Paper – SAICA
<b>Ricardo García</b>	Director PLAZA S.A. – Logistics Platform of Aragón

<sup>4</sup> To be confirmed

For each individual work package, a separate **WP leader** will be appointed. These leaders will be chosen by the region in question that is responsible for each work package. They will be responsible for coordinating the work to be carried out in their WP, tackling any problems, and reporting to the PM on the WP progress. Also, the various WP leaders will form the **Management Team (MT)**. The MT will consist of Arjan van Binsbergen (WP1), Jack Thoms (WP2, 3), Mats Johnsson (SP4), Fevzi Filik (WP5) and Francisco Bordejé (WP6). This team, together with the Project Manager (PM) will be responsible for the coordination and implementation of the work packages. They are in frequent contact with PM and the MB. The MT will meet on a quarterly basis but will remain in close contact via email, teleconference and telephone on an ad-hoc basis.

With a consortium of this (indirect) size, it is important to set up an adequate **decision-making mechanism**. The MB will be responsible for all strategic decisions within the project. Each cluster is represented in the MB and all decisions will be taken in consensus. In case of conflict, decisions will be taken on the basis of a majority of votes.

With respect to the below mentioned above, a multi-tier management approach will be followed in order to facilitate the needs of the consortium and ensure proper and efficient management. At the top of the hierarchy, the **Project Management Board** will maintain ultimate authority in the project. This board will be the core organisational and decision-making body. Overall management and administration is undertaken by the **Project Coordinator** who ensures coordination in all different management tiers. He will report back to the Project Management Board for key-decisions that affect the structure and success of the project. Administration and collaborative work tools and instruments are tasks undertaken by the **Project Secretariat**, which comprises of infrastructure and resources as a combination of administration, financial management, project document repository, archive e-mail list administration and project on-line portal which all support the administration. The **Management Team (MT)** will be responsible for the daily activities within each WP and will report back to the Project manager.

The main objective of the **Project Management Structure** is to ensure a fluid communication and that all project related tasks are performed successfully and according to established contractual and technical requirements.

### Communication flow, tools and instruments

All internal project communication such as meeting notes, including financial and technical progress report, a list of decisions taken and a to-do list, will be made available to all partners on the project website. The internal website will also be used as a place for discussion groups for technical issues.

The SoCool@EU management structure will make extensive use of the following tools and instruments in order to facilitate the coordination of the project and enhance the communication between all partners:

- Regional meetings among regional cluster participants.
- Telephone and web calls (Skype).
- Teleconferences.
- MS-Project for time planning and monitoring tasks, issues and deliverables.
- Project Web site. It is the main dissemination and information to the public tool for the project. Furthermore, it will be used as a place for discussion groups for technical issues.
- Meeting notes, including financial and technical progress report, a list of decisions taken and a to-do list, will be made available to all partners on the project website.
- Informal communications via email, bilateral telephone calls, etc. is to be expected in the project. The coordinator will be setting up one e-mail reflectors for communications for every consortium participant and subsequent ad-hoc lists to accommodate work in smaller interest groups.

The project management board will meet every 6 months. All consortium partners shall attend the plenary meetings. In addition, there will be quarterly telephone/web conferences calls and, if necessary, in between meetings or telephone/web conferences for communication within or between the WP's.

## Conflict Resolution

In the case of any conflict, maximum effort will be spent to resolve the situation with informal discussion to find a solution. In an extreme case of no agreements, the Project Manager (PM) will organise a conflict resolution meeting within 30 days following the reception of a written request transmitted by any SoCool@EU partner. The request will include potential solutions and requests an answer within a stated time. All issues (both operational and strategic) will be discussed among the members receiving inputs from task leaders. Decisions are taken at a majority of 6/10 (60%) of the Project Management Board present or represented by proxy. Any decisions so taken are subject to the additional provision that any Member whose work or the time for performance of it are thereby affected or whose costs or liabilities are thereby changed has voted in favour of the decision. In the case of specific strategic issues, the PM may ask the Advisory Board to cast an additional vote (this decision will follow the normal voting procedures).

## Quality Assurance

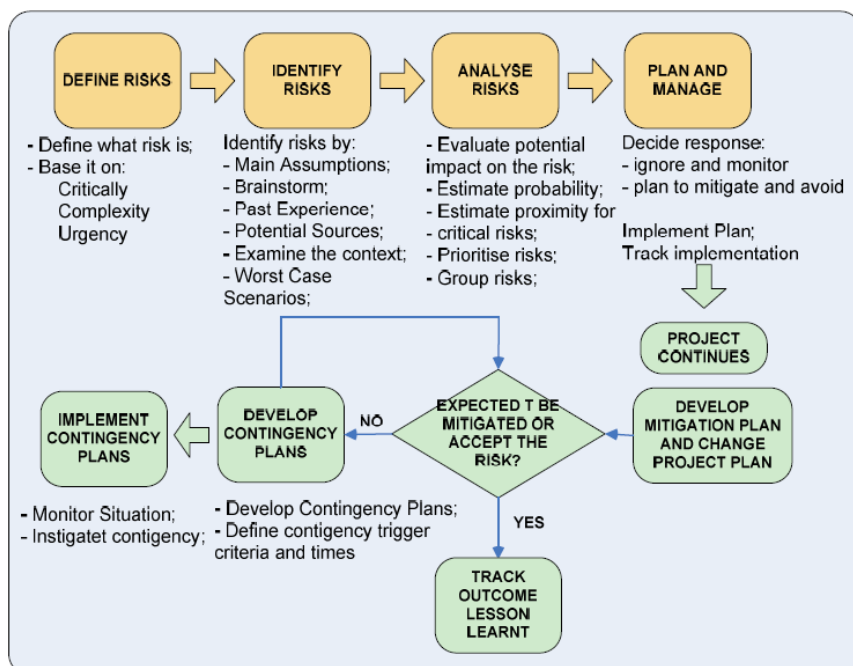
A project quality assurance plan will be established at the kick-off meeting, specifying all critical points and detailing all quality-related activities and methods that are necessary in at Task, WP and project levels. A number of project quality procedures, regarding cardinal issues like documentation control, reporting, validation, assessment, auditing, etc. will be specified. Feedback from Commission reviews will be included in these procedures.

The Management Board will develop **an internal quality audit plan that will assess and verify the achievement of the objectives**. A widely accepted by international bodies methodology for project assessment, the **Logical Framework Method (LFM)**, will be applied safeguarding prudent use of –project internal- resources vis-à-vis achievement of the objectives. Elements of this methodology are the **Objectively Verifiable Indicators (OVIs)**, that describe overall objectives, project purpose, and results into operationally measurable terms (quantity and quality, target group(s), time and place); they should give an adequate picture of the situation and be measurable in a consistent way at an acceptable cost. Operational descriptions give insights into the overall objectives, project purpose and results, enabling us to:

- Check the pertinence and viability of the project purpose and results;
- Monitor progress towards achieving them
- In the most general case, an operational description in the form of an OVI must give answers to the following questions:
  - What is the quality and quantity of the "product" of the project?
  - How is it "paid for" (and distributed)?
  - Who will benefit (target group) from the project results?
  - Over what period of time the will results be available?
  - Where is it produced and consumed?
  - OVIs often need to be specified in greater detail and tailored to the needs of the operation during the implementation phase to allow for effective monitoring.

## Risk Management

An identification of high level risk was performed in B1.3.v "Risks identified and contingency plans" will be applied in order to minimize possible deviations from the expected project results and schedule. **So-COOL@EU** will follow the risk management system represented in following figure.





## B2.2 Individual participants

Description of legal entity	<p>The <b>Dutch Institute for Advanced Logistics</b> (Dinalog) has been created to unite and coordinate regional efforts to improve the competitiveness of the logistics sector.</p> <p>Dinalog was appointed on behalf of all the Triple Helix Partners in the Netherlands in Logistics and Supply Chain Management as the responsible organisation for executing the National Innovation Program on Logistics and Supply Chain Management. Dinalog strives for open innovation that stands right to wide implementation by exploiting SME networks and by anchoring knowledge in curricula of training by three working parties: Academic, Professional and Vocational.</p> <p>Dinalog is also responsible to develop and exploit the National Open Innovation Campus and Innovation Eco System in the Netherlands on Logistics and Supply Chain Management, located in the Rhine-Scheldt Delta region in Breda.</p>
Main tasks attributed	<p>WP leader of the work package 1 “Project management”.</p> <p>Essential role in implementation of WPs 3, 4 and 6.</p>
Previous relevant experience	<p>See also the description above. The collaborating entities and persons involved in Dinalog and VIL have previous experience through previous and current jobs in several national funding schemes such as the national research &amp; development programs ICES-KIS2 Connekt (hub operations), OLS (logistics systems), KLICT (ICT and logistics) and ICES-KIS3/BSIK Transumo (sustainable mobility and logistics) and NGI (infrastructures), participate in the programs ‘Sustainable Accessibility of Cities’ and ‘Sustainable Logistics’. They also participate in programs like ‘Pieken in de Delta’ (logistics innovations), joint university-business programs with the Port of Rotterdam (Port research Centre Delft Rotterdam, SmartPort Rotterdam), and in European projects like in KP7 and Interreg programs.</p>
Short profile of staff members involved	<p><b>Ir. Wim Bens</b> is Managing Director of DINALOG, the Dutch Institute for Advanced Logistics and Strategic Advisor Municipality Breda, Open Innovation Campus Logistics &amp; Supply Chains; previously, Bens was Managing Director of TU/e Innovation Lab (of the University of Eindhoven) and Managing Director of the Knowledge Transfer / Knowledge Valorisation of this same university, chairman of the national network of University Incubators, member of the Innovation Group of the Province North Brabant, member of the advisory council and chairman of the member council of Rabobank Eindhoven-Veldhoven, member of the evaluation board of the Ministry of Economic Affairs regarding SME Innovation Policy. Bens holds several positions as trainer, coach and advisor of the management / board of industrial companies and small start-ups.</p> <p><b>Prof. dr. Henk Zijm</b> Dr. Henk Zijm is Scientific Director of DINALOG; Zijm is professor at the University of Twente and member of several national and international organisations (Netherlands and European Societies on Operations Research, International Society on Inventory Management, Institute for Operations Research and Management Science, Production and Operations Management Society, European Operations Management Association, International Institute for Production Engineering Research). Prof. Zijm is also Vice-chairman of the Board of Directors of OOST (the Development Agency East Netherlands). Previously, prof. Zijm was Rector Magnificus of the UTwente, Member of the Strategic Advisory Council of TNO-Industry and Technology, of the Advisory Board of the joint UT-TU/e Research School BETA, of the Board of the International Society of Inventory Research and Member of the Executive Board of the Netherlands Technology Foundation STW.</p> <p><b>Dr. Arjan van Binsbergen</b> is International Project Coordinator for DINALOG and also project leader and associate professor at Delft University of Technology. Previously, Van Binsbergen was managing and deputy scientific director of the Netherlands postgraduate Research School on Transport, Infrastructure and Logistics, member of the management team of the Netherlands Transumo R&amp;D Program and manager of the ‘Transport Research Centre’ of TU Delft.</p>
Description of legal entity	<p><b>ALIA</b>, the Association of Innovative Logistics of Aragón, involves all actors in the region that operate in the sectors of logistics and transportation, primarily business entities, with the aim of promoting Aragón as an international centre of excellence in the sector and contributing to the economical, social and technological development within the sector and the associated companies.</p>
Main tasks attributed	<p>WP leader of the work package 6 “Dissemination and Valorisation” and first contact for the mentoring region, mainly through work package 5.</p>

<p><b>Previous relevant experience</b></p>	<p>The collaborating entities of ALIA have a wide experience within the European Framework Programme that reaches a total of 19 approved projects. ZLC has a total of 3 approved projects, within the areas of ICT, Security and Green Logistics. ITA has participated in the 5th, 6th and 7th Framework Programme with a total of 16 approved projects, two as coordinators, within the areas of ICT, NMP and collaboration with Small and Medium Enterprises. Both entities have also participated in several projects financed through national funding schemes, such as GLOBALOG, CENIT SPHERA, Intelligent Supply Chain Labs, ITCHAIN, STIPP, SIT, GlobalSIM, OpenBIP, SemTOUR, AIMTRAFFIC, ES-WAMAR, PEDIFER, Nano-TPE, MULFATER, PROVIFE, SYPPRA, IE-VULTUS and RAAP. Finally on a Regional level the institutions have participated in several multidisciplinary projects financed by the Regional Government of Aragón.</p> <p>Due to its members' wide experience with international collaborations and its past contact with the Region of Mersin, ALIA will be the project partner that leads the contact with the mentoring region. Also, the members of ALIA have a wide experience in the organization of successful dissemination activities and events such as courses, workshops, round tables, summits, conferences, etc. As examples of the experience in the organization of events we wish to mention the Crossroads 2007: Supply Chain Innovation Summit, the ZLC PhD Summer Academy, the MIT-Zaragoza Speakers Series, the Global Health Supply Chain Summits and the 1<sup>st</sup> National ICT for Logistics Conferences. Furthermore, both research entities of ALIA offer educational and executive courses in various logistics and supply chain management-related disciplines. In the case of the specific collaboration of Zaragoza Logistics Centre the organization of this kind of educational and dissemination events could go under the umbrella of the MIT-Zaragoza International Logistics Program.</p>
<p><b>Short profile of staff members involved</b></p>	<p><b>Mr. José Luis Carreras Lario</b> is the President of ALIA as well as the current General Director of the division of transportation at Carreras Grupo Logístico. Furthermore, he is a member of the Board of Directors of the Chamber of Commerce of Zaragoza.</p> <p><b>Mr. Francisco Bordejé</b> is the ALIA's coordinator. Prior to joining ALIA, he carried out a 5 year career in project management in the renewable energies sector and he also has experience in Sales and Production Management.</p> <p><b>Mr. Ignacio Martínez de Albornoz</b> is the Director of Internationalization at Aragon Exterior (AREX). He coordinates the regional activities directed to help private companies and public bodies in the process of internationalization. Given the close ties between internationalization and innovation, he has actively involved AREX in the foundation of innovation clusters (such as ALIA), in the regional network of promotion of the 7FP, and in several European innovation networks. He is a previous Strategy manager at the consulting firm Accenture.</p> <p><b>Dr. David Gonsalvez</b> is a Professor at Zaragoza Logistics Centre and prior to joining ZLC, he carried out an over 20 year career with General Motors. Dr. Gonsalvez has a Ph.D. in Operations Research from the Ohio State University.</p>
<p><b>Description of legal entity</b></p> <p><b>Main tasks attributed</b></p> <p><b>Previous relevant experience</b></p>	<p>The HOLM is an open, neutral, and interdisciplinary platform for cluster actors from the economy, science and politics. As an Institution for Collaboration directly at Frankfurt Airport in the Gateway Gardens (physical building will be finished until 2013), it is committed to interdisciplinary, practice-relevant research, student and executive education, as well as to the development of innovative concepts, products, and business ideas in the sector of logistics and mobility. The HOLM functions as a marketing platform for the region and the location advantages for logistics in Germany.</p> <p>WP leader of the work packages 2 "Analysis and integration of research agenda's of actors in regional clusters" and 3 "Initiatives to improve integration: definition of a Joint Action Plan".</p> <p>The "Centre for Cluster and Competitiveness (CCC)" of HOLM in collaboration with the Supply Chain Management Institute (SMI) at the EBS Universität i. Gr. has driven forward research activities in the logistics area, such as logistics clusters, logistics within industry and service clusters, as well as global networking of logistics-related cluster activities, and is thereby working on an existing gap in research. It is part of the global Research Network "Microeconomics of Competitiveness" (MOC) of Prof. Michael Porter and his "Institute for Strategy and</p>





<p><b>Short profile of staff members involved</b></p>	<p>Competitiveness” at the Harvard Business School. The CCC is also host to the cluster initiative Logistik Rhine-Main as the knowledge initiative active in the regional cluster management and aiming to enable the generation and dissemination of logistics knowledge in the region, by connecting local cluster actors.</p> <p>HOLM-/ SMI-Research has verified within the scope of research work and acknowledged cluster statistics that there is a positive connection between cluster presence and regional success. For example, with every percentage point of cluster presence, the regions’ productivity increases by 44 eurocent per person and hour, the patent rate rises by 2.73 patents per 100,000 inhabitants and the average employee remuneration by € 302.</p> <p><b>Prof. Dr. Stefan Walter</b> has been Junior Professor for Logistics Management at the Supply Chain Management Institute (SMI) with the EBS European Business School. He is the Managing Director of the House of Logistics and Mobility (HOLM) and has an interest in cluster and competitiveness research.</p> <p><b>Dr. Jack Thoms</b> is Senior Manager for Marketing/Sales and Research/ Education at the HOLM. He completed his dissertation in logistics at the Technical University of Berlin. Dr. Thoms is instructor for cluster courses in the Master’s degree of the EBS European Business School.</p> <p><b>Dr. Falk Raschke</b> is the Managing Director of the Centre for Cluster and Competitiveness at the SMI/HOLM. He wrote his dissertation by analyzing the competitiveness of the Rhine-Main logistics cluster. Dr. Raschke is the scientific head of the cluster initiative Logistik RheinMain.</p> <p><b>Mr. Pascal Huther, M. Sc.</b> is project manager in the Centre for Cluster and Competitiveness. He did his Master’s degree in cluster analysis and strategy development for Rhine-Main Logistics. His interests are clusters, innovation networks, and regional competitiveness.</p>
<p><b>Description of legal entity</b></p> <p><b>Main tasks attributed</b></p> <p><b>Previous relevant experience</b></p> <p><b>Short profile of staff members involved</b></p>	<p><b>Øresund Logistics</b> is a non-profit cluster initiative in the Danish-Swedish cross border Øresund Region, which builds on close triple-helix cooperation between 5 universities, 3 regional authorities and the two main industry organisations. Øresund Logistics has a network including around 500 companies and has since 2003 worked as an engine for growth and a catalyst for innovative activities. Activities include numerous knowledge intensive projects together with companies and universities.</p> <p>Øresund Logistics will carry out the activities in the project in a close cooperation with Next Generation Innovative Logistics – NGIL (same legal entity). NGIL is a VINN Excellence Centre based at the Lund Institute of Technology of Lund University. NGIL provides knowledge, methods, techniques and tools for companies and organizations to increase supply chain visibility and to manage deviation in logistics systems. NGIL unites a long range of members with three academic divisions at Lund University; Engineering Logistics, Production Management and Packaging Logistics and focuses on the thematic areas of Visibility, Risk and Flexibility.</p> <p>WP leader of the work packages 4 “Measures towards the implementation of a Joint Action Plan”.</p> <p>Øresund Logistics has been (and still is) actively developing the logistics cluster strategy for the Øresund Region in a close cooperation with the divisions for regional development of the Regions of Skåne, The Capital Region of Denmark and Region of Zealand. The focus is on identifying and developing new growth areas through projects within topics such as City logistics, Humanitarian logistics, sustainable logistics and Green Corridors, as well as increasing the capacity level among the work force in order to retain competitiveness in the cluster within areas such as Shipping, EcoDriving and entrepreneurship. Øresund Logistics has since 2003 developed knowledge intensive projects within logistics for a total value of more than 45 million €. The present project portfolio includes funding from FP7, Marco Polo, Interreg 4A, Interreg 4B, Centre for Grøn Transport and Vækstforum (national Danish funding).</p> <p>At NGIL: FP6 and FP7, Leonardo, Active Labour Force, Civil Society Dialogue projects have been implemented.</p> <p><b>Mr. Patrik Rydén</b>, is the managing director of Øresund Logistics. He holds a Master of Science in Civil Engineering and Industrial Economics and has been responsible for managing Øresund Logistics since 2003. His work has included carrying out the platforms strategic decisions as well as identifying, initiating, managing and participating in a vast amount of logistics related knowledge</p>





intensive activities, such as projects, regional strategy development, network activities, workshops, seminars, conferences and branding activities. Patrik is furthermore member of the Board of directors of NGIL and a member of several advisory boards within innovation and transport.

**Mr. Urban Björn** has been the logistics manager at Volvo Car responsible for logistics worldwide. Urban is now chairman of NGIL (VINNEXCELLENCE centre at Lund University) and is also project leader for setting up a logistics programme at Campus Helsingborg, Lund University.

**Mr. Mats Johnsson** Associate professor at Div of Packaging Logistics, Lund University and Managing Director of NGIL. He is also responsible for the new Logistics Service programme at Campus Helsingborg, Lund University. His area of research and special interest is how to utilise the unit load in a better way to increase the supply chain efficiency.

**Mr. Jan Boyesen** is Development Manager at Øresund Logistics and holds a BSc and MSc in Technological and Socio-Economic Planning. His main responsibility is to develop and initiate logistics related projects that cover areas such as cluster development, city logistics, sustainable logistics and shipping innovations.

Description of legal entity	<p>Mersin Chamber of Commerce and Industry <b>-MTSO-</b> performs the following functions as made incumbent upon it by law:</p> <ul style="list-style-type: none"> <li>• Registration and cessation procedures in respect of commercial and industrial organizations,</li> <li>• Determination of capacity of industrial organizations,</li> <li>• Registration and approval of exports procedures,</li> <li>• Procedures related with TIR certificates,</li> <li>• Provision of price indexes, preparation of expertise reports</li> <li>• Provision of all other services as may be required by its members,</li> </ul> <p>In addition to the above functions that are required by law:</p> <ul style="list-style-type: none"> <li>• Directing industrial and commercial development of the province,</li> <li>• Conducting studies for integration of the province and its members with the world economy,</li> <li>• Sponsoring social and cultural activities in the province,</li> <li>• Developing projects in co-ordination with public organizations and NGO's,</li> <li>• Preparation of commercial documents,</li> <li>• Provision of consulting services,</li> <li>• Looking into investment opportunities and informing investors accordingly,</li> <li>• Conducting sector researches inside and outside the country,</li> <li>• Conducting studies on the relations with European Union,</li> <li>• Provision of training services in various areas for its members.</li> </ul>
Main tasks attributed	WP leader of the work package 5 "Support activities relating to mentoring"
Previous relevant experience	FP6 and FP7, Leonardo, Active Labour Force, Civil Society Dialogue projects have been implemented
Short profile of staff members involved	<p><b>Mr. Fevzi Filik</b> is the Coordinator of Logistics Platform (Initiative) which is established through Mersin Chamber of Commerce and Industry. He is also in charge of Projects as Manager in the subject of Logistics in Mersin Chamber and has been working in cluster and competitiveness research of Logistics Sector in Mersin region. He graduated with a bachelor degree in Industrial Engineering and Master's degree in Logistics Management in Istanbul Okan Faculty of Logistics.</p> <p><b>Mr. Fikret Zorlu</b> is the Deputy Dean of Faculty of Architecture in Mersin University. He is the Logistics Platform's President's Advisor on Logistics Sector. He graduated with a degree of Regional &amp; Urban Planning from Middle East Technical University and continued his education and research successfully with a doctorate degree in the subject of Urban Planning &amp; Development through Logistics in Global Civilization. He was in charge as the Advisor of the Turkey's first Regional Innovation Strategy project and in ongoing of the project in Mersin which is financed through the 6<sup>th</sup> Framework of EU Commission.</p>

**Mr. Erdem Yarkin** is graduated from University of Central Missouri in 2002 with a Bachelor of Science in Business Administration majoring in Management with Computer Information Systems. He worked as the Regional Marketing Assistant in the company of Cydcor Platinum Marketing in Washington, DC. He worked as a Foreign Trade Manager & Logistics Specialist in Ota-Net Ltd Co. in Ankara and Panatel in Istanbul. Currently, he is working as a Project Manager in Mersin Chamber of Commerce and Industry. He is also the Network Director of Mersin Business Angel Network to support the Investment promotions of Logistics Sector.

## B2.3 Consortium as a whole

The consortium is inclusive and highly complementary at various levels.

Firstly, partners represent all European directions: North (Sweden), East (Turkey), South (Spain) and West (Then Netherlands and Germany). This geographical coverage is an excellent starting point for the current project but also for future clusters that will join the platform as each direction in Europe will have its own 'representative'.

Secondly, nearly every transport focus is present within the consortium: sea ports, dry ports, airports, short-sea shipping, rail and road connections. There is a limited overlap between partner foci and activities which means that new synergies can be created and sector-specific experiences and best practices can be exchanged. Also, the European platform will be accessible to all types of clusters; not only from all regions but also with a thematic focus – the platform will have the knowledge and expertise available to service a wide range of cluster-types.

Thirdly, different partners have different strengths and needs, as reflected in the table below.

Research strengths	Partner interested in gaining this knowledge
Dinalog	
Fully integrated supply chain networks (4C) Planning of (intermodal) transport chains, integrated hub operations Forefront transport services and technologies (service logistics)	ALIA HOLM Øresund
Øresund	
Total value chain: visibility, risk sharing / contracting, secure logistics, packaging logistics, traceability Warehouse management and operations research: optimization, storage dimensioning, storage for spare parts, city logistics Food logistics: auto ID, smart packaging	Dinalog MTSO ALIA
ZLC	
Intermodality / co-modality Green logistics, green corridors Urban logistics Financial aspects of operations decisions Transport planning	MTSO Dinalog Dinalog
HOLM	
Strategy development: logistic service provider, green transport Interdisciplinary research Social, economic and ecological sustainability Management of processes Risk management and sustainability Future studies	ALIA Øresund Dinalog ALIA
MTSO	
Intermodality / co-modality Logistic service provider Integrated hub operations	ALIA HOLM

The consortium partners have already collaborated in several occasions and through these activities they have demonstrated a sustainable collaboration network. These initiatives involve both training, research and coordination activities and they are oriented at creating a European Excellence Network within the area of logistics and supply chain management. Currently, they are participating in three other proposals; one within the 7FP (Transportation), another in the IV Interreg Programme and finally one in the Lifelong Learning Programme.

Each partner plays a unique role in the consortium and is indispensable in the team. Furthermore, the complementary nature of partners, their individual strengths and their eagerness to further develop and grow will generate synergies that would not have been possible within a consortium of a different composition, with a limited geographic and thematic scope.

#### i) Subcontracting

The consortium to execute SoCool@EU is composed of the legal entities representing the regional clusters. In order to keep the management of the project as simple as possible, we have opted to keep as little partners as possible. Each cluster organisation unites all three types of legal entities of the 'triple helix', the cluster as a whole is represented through one legal entity.

However, these cluster organisations are not very large organisations. They only employ a few people. Consequently, each representing organisation will not be able to execute all the tasks identified in the project: analysis, definition of Joint Action Plan, measures towards the implementation of the JAP. Such representing organisation can rely on the effort of several partners from the cluster to execute these tasks.

We have allocated the budget to execute the activities of SoCool@EU to each of the legal entities representing the research-driven clusters. Where necessary this central legal entity can allocate budgets (subcontract) to the activities and the parties actually executing the activities. Executing the studies necessary for the analysis for example, could be subcontracted to the most suitable parties.

However the FP7 rules leave an option that perfectly applies to our situation: third party carrying out part of the work. A set of special rules apply to this situation. Since the work of our project will be carried out by legal entities that are part of a cluster, these legal entities can be considered to be third parties linked to the beneficiary (= the legal entity receiving EC grant).

#### ii) Other countries N/A

#### iii) Additional partners N/A

### B2.4 Resources to be committed

The SoCool@EU project participants have calculated the necessary effort at a work package level and then aggregated it to obtain a total estimation of manpower of 348 person months. The overall budget of SoCool@EU reaches a total of € 2.823.097 with an equivalent requested 100% EC contribution. This coordinating action will last 36 months, where management, coordination and other activities (dissemination, networking, etc.) will take place.

	Name	Total	Dinalog	HOLM	ALIA	Oresund	MTSO
1	Coordination	€ 450.132	€ 430.132	€ 5.000	€ 5.000	€ 5.000	€ 5.000
2	Analysis	€ 774.630	€ 148.302	€ 298.423	€ 138.672	€ 149.993	€ 39.240
3	JAP	€ 432.082	€ 79.094	€ 162.706	€ 78.538	€ 79.993	€ 31.750
4	JAP implementation	€ 613.632	€ 118.642	€ 118.393	€ 110.809	€ 242.248	€ 23.540
5	Mentoring	€ 202.690	€ 29.660	€ 34.255	€ 67.143	€ 29.532	€ 42.100
6	Dissemination	€ 304.860	€ 49.434	€ 48.813	€ 122.783	€ 52.430	€ 31.400
		<b>€ 2.778.026</b>	<b>€ 855.265</b>	<b>€ 667.591</b>	<b>€ 522.944</b>	<b>€ 559.196</b>	<b>€ 173.030</b>

10% of the budgets described will be reserved for communication purposes such as travel, teleconferences, etc.

Personnel costs and rates vary between universities, authorities, institutions and enterprises but also between different partners, including costs which are in overhead or identified by cost item. The average person month rate is calculated on the basis of gross monthly salary costs per function level and excluding overhead. Different levels of tariffs for different qualified persons will be used, varying from rates for assistant technical and secretarial work to senior project managers.

Travel costs are calculated on a set of regular flights for each participant, which are only for meetings. Costs are – based on earlier projects, estimated at € 1.000 per meeting per partner. € 250 is calculated per day at the meeting place (2 days per meeting: all costs: consumables incl. hotel). Flight costs amount to € 500 on average per person, per meeting. An estimated 2 meetings per year will take place per partner.

For specific non-core tasks within the Work Packages, external experts will be subcontracted. This only relates to aspects which are not within the common expertise of project partners, like fiscal / legal aspects of the structure, advantageous financial structure (related to fundraising strategy) or benchmarks for which specific expertise is required. Subcontractors will be selected by the economically most beneficial offer.

Based on the personnel costs (average over the participants) the average overhead is calculated at a maximum of 7% of the basic salary costs.

The own resources of each region will be committed to this project for the implementation of the JAP (e.g., R&D, mobility, infrastructure, skills enhancement, access to finance, etc.). The regional authorities have clearly stated and demonstrated their commitment to include the expenses of the activities to be carried out in the planning of the future budgets.

## B3. Impact

### B3.1 Expected impacts listed in the work programme

1) *“Developing and integrating research-driven clusters across Europe in order to promote regional economic development and worldwide competitiveness”*

Project partners are strategically spread with respect to their geographic location and thematic focus. With Dutch / Belgian, German, Spanish, Swedish / Danish and Turkish clusters SoCool@EU has a true European coverage. Additionally, there is a differentiation in focus and strengths which ensures a wide thematic scope from sea ports, airports and ‘dry ports’ to short-sea shipping. This unique combination will enable the clusters involved to benefit from each other’s experiences and best practices, create a dedicated and sustainable approach towards business, policy and research. These elements will form the basis for a solid economic and scientific impact, and an optimal utilization of the existing potential for growth as described under B1.1.3. Economically, the collaboration will help increase cost-efficiency within each cluster, generate a GDP growth, result in more jobs, etc. Scientifically and educationally, the project will contribute to a better alignment between research and practice/implementation. Also, the knowledge institutes in this consortium, in close collaboration with private sector, aim to start up a dedicated Master Course in logistics and supply chain management. This will create a new generation of high-level professionals that are well-equipped for employment in the logistics sector, making the sector more specialized, proficient and ultimately more competitive.

Within logistics, most added value is created in managing the supply chain (brains) and not in the actual physical movement of the goods (hands). Since the organization of a supply chain is essentially foot loose, future development of the supply chain sector can benefit or harm Europe. In case Europe succeeds in

attracting the organization of major supply chains, this high added value will be generated in Europe. However if we do not succeed in attracting the organization of major supply chains, Europe will increasingly lose this added value which will damage economic growth in Europe. Strong regions with a clear focus on supply chains are key to create a competitive environment to attract the direction of supply chains to Europe. Highly qualified professionals, working in an environment with easy access to knowledge and inspiring business contacts will be attracted by such strong regions with a clear focus on sustainable supply chain management. The partners in SoCool@EU have the ambition to create such regions in Europe.

Within the logistics sector, innovation is restrained by the accession of new players willing to operate below cost price. Actually this phenomenon is most visible in the market of road transport. Drivers from Eastern European countries are prepared to operate at very low income levels. As a consequence road transport is very cheap. There is too little incentive in the market to increase efficiency in the supply chain, because of these actual low costs of road transport. However this situation is not sustainable in the long run: with the aging of the European population, within a few decades we will no longer dispose of enough labour to continue the current logistics sector. Furthermore the dominant road transport results in undesirable effects like too high energy consumption, pollution and congestion. Within regions and between regions, public authorities need to collaborate to create an innovation friendly market. SoCool@EU will stimulate this interregional cooperation, thus contributing to increase the efficiency of the supply chain and diminishing the negative effects of logistics. Directly and indirectly this will boost Europe's competitiveness.

Logistics performance is a key element of competitiveness of all industry of physical goods. Improving sustainable logistics performance in Europe will thus have a direct impact on the economy as a whole. Big industrial players are capable of optimizing their supply chains themselves. SMEs however depend on logistics service providers. There still is an enormous potential to boost competitiveness in Europe by facilitating the access to supply chain knowledge by SMEs. It is our strong conviction regional knowledge based clusters are essential to provide companies and especially SMEs access to this knowledge. In this field business and societal interests go hand in hand: improving logistics performance serves the interest of companies by increasing profitability and the interest of society at large by reducing negative side effects like high energy consumption, pollution and congestion.

The consortium sees SoCool@EU as a starting point. The partners aim to create a European logistics platform, open to logistics clusters and actors throughout Europe. The initial impact will already be substantial because of the extensive geographic/thematic spread of project partners. Once the platform is up and running, the effects will be multiplied in many other European regions. In summary, the project will start off having a regional impact which will then be multiplied into a national, transnational and European impact.

2) *"Delivering more effective investments in R&D at regional level through the definition and implementation of regional strategies based on business needs or the reinforcement of private and public partnerships"*

Knowledge institutes, regional authorities and business are interlinked in the sense that research plays a crucial role as instigator of policy and business. Knowledge generated by academia needs to be converted into products or processes that companies can market. Regional authorities define policy based on market demand. In most clusters, regional policy with respect to logistics and supply chain management is already drawn up in collaboration with relevant stakeholders, such as local universities and (representatives of) the private sector. Additionally, several clusters have initiated new public-private partnerships or they will work to reinforce existing collaborations.

By analysing existing research agenda's, a detailed overview will be obtained of the state-of-play within each cluster. Based on the results of this analysis as well as the identification of all relevant stakeholders and their needs, the consortium will map and (further) implement future public-private collaborations and they will use the results to further strengthen the existing research policy agenda's. This will not only result in a regional policy and strategy that is well-aligned with academic resources and business needs, but it will

also exploit new synergies, develop new collaboration strategies and ultimately improve logistic performance.

The partners in SoCool@EU have the conviction that strong logistics regions will play an increasing important role in setting the policy agenda at national and European level in the field of investment in knowledge and infrastructure. The partners in SoCool@EU have the ambition to build a European platform of logistics regions, that will become a major discussion partner in the decisions on national and European (TEN-T, FP7 - 8, CIP) investments in sustainable knowledge and infrastructure. At national level the regions already play an important role in spatial planning (infrastructure). Policies on knowledge development at regional level can be improved, as well as the explicit influence of regions in European investments in infrastructure.

3) *"Including more regions into the "Regions of Knowledge" action, into the knowledge economy and the ERA, especially through the mentoring of regions with a less developed research profile"*

As described before, the project aims to generate a European platform for logistics and supply chain management. This platform is initially set up and run by the current partners, following their current situation, needs and requirements. However, the platform must be seen only as a starting point. What consortium partners aim to achieve is the creation and functioning of an international and dynamic platform, open to participation from clusters in all European countries and evolving with the developments, needs and requirements that exist in each sector in these (new) clusters: public, private, academic, commercial, etc.

No such platform exists to date. There are various collaboration mechanisms in the field of logistics and supply chain management throughout Europe. However, none of these initiatives incorporate such wide focus and comprehensive approach when it comes to geographic scope and thematic strengths. As the current and future clusters represent the triple helix of regional authorities, knowledge institutes and business entities, the project will have a direct impact on research, policy, education, innovation and competitiveness.

### **Need for a European approach**

Logistics and supply chain management by definition require a transnational approach for several reasons

- Transportation flows most of the time cross borders. This means that the project by nature also requires a European approach.
- The analysis and integration of current research agenda's, stakeholder needs and complementarities between partners would have little effect if it were done at a national level. The results of the analyses will have a European dimension so that the output can also be used by other European countries.
- Operations in a particular region may have an impact on the global logistics and supply chains.
- Also, sustainability of transportation and supply chain management as an important European challenge needs to be developed on the basis of standard characteristics and tools that can be interpreted and used in any European region or country.
- Other elements include joint efforts such as staff exchanges, research plans, training and innovation activities. Existing collaborations and exchanges within clusters will be further developed and enhanced, but more importantly; new training and exchange plans will be set between clusters so that partners can teach and learn from each other how to strengthen their own cluster, based on best practices from other clusters. All partners and specifically the mentoring region will benefit from such a transnational approach.
- A strong global competitiveness of Europe can only be achieved by promoting and aligning (regional) innovation policies, and providing a platform for regions to collaborate and exchange experiences.
- Finally, dissemination of project results will be one of the ultimate benefits of SoCool@EU. All results will be secured and distributed to a wide audience via various dissemination channels as described in WP6.



European added value can only be created by incorporating clusters spread across Europe in the project – the five countries of this consortium to begin with. The platform created will then be expanded by as many European clusters/region as interested in participating.

With the SoCool@EU project as a starting point, the platform will offer many benefits with a clear European dimension.

### **Other activities taken into account**

Parallel and in connection with the current project clusters, various related initiatives are taking / will take place. Within the Dutch region for example, the interregional collaboration network DeltaNet aims to promote knowledge exchange between European delta areas i.e. estuarine areas where urbanization, economic activity (ports) and nature development are an issue. The Aragón region has several networks and platforms that will provide useful connections to this project, such as the Mercazaragoza – a logistics platform specialized in food. In the Rhine-Main region in Germany, several other highly-developed clusters are operational, such as the automotive cluster; HOLM will ensure active links with these clusters in order to benefit from their experiences and best practices. Øresund region has close ties among others with the Femern Belt Logistics Platform which functions as a catalyst for new logistics projects and initiatives and the Femern Belt connection. Mersin will collaborate closely with the Agforise initiative, funded under the 2008 FP7 Regions of Knowledge call. This project targets at creating a common sustainable dialogue platform and joint action plan among agrofood clusters, to maximize research capacity and infrastructure. The ambitions of SoCool@EU are linked to some extent with these other activities but remain unique in the sense that the project will create something that non-existent: an open and accessible European platform for research-driven regional clusters that will realize an increased European collaboration for more sustainable and competitive freight gateways and hubs.

Natural links with these activities are already present through dual/joint membership of cluster partners in both SoCool@EU and these other projects. However, SoCool@EU intends to activate these links by giving them a more active role in the project; most importantly, in the dissemination of project results.

### **Assumptions / external factors**

The strengths and weaknesses identified in WP2 will be registered in a general database available to European organisations upon request. The extent to which this tool will be accepted, will determine its usefulness and the impact of the analysis in the relevant sector. A factor that may influence the project's proceedings is the number of existing projects, organisations and networks that are approached by the partnership as well as the external organisations that expressed might express their interest in being involved in SoCool@EU actions. They will bring in additional expertise, knowledge and complementary competencies. The impact on economic competitiveness is also determined by the specific support actions that are necessary to meet the needs determined by the analysis and that may be implemented at a later stage.

## **B3.2 Dissemination and/or exploitation of project results and management of IP**

The dissemination and validation of the project results of SoCool@EU will be carried out under the WP6 described in the Work Plan section. An optimal effect of dissemination activities will be enhanced also through and individual regional dissemination that will take place in the other works packages through regional meetings. This section describes the general actions and strategies to be undertaken in order to ensure an efficient dissemination of project results. SoCool@EU will develop a detailed plan for dissemination to stakeholders, policy makers at European, national and regional levels, and to the general public. SoCool@EU will also include a 'conversion factory' as a mechanism to validate newly generated knowledge. It will be an instrument that will translate excellent research and ideas into practice, resulting in innovation that can be applied in the market. For this purpose, the platform will focus on, and facilitate the creation of new companies / start-ups as generators of innovation, to function as 'conversion factories'. Innovation must remain user-driven; research agenda's will be drawn up based on input from the triple helix – industry, academia and regional authorities.

The objectives of the dissemination activities of SoCool@EU are:

- Establish and reinforce relations with decision makers, with the industry, and with press and mass-media.
- Create a framework that will stimulate existing and new companies and clusters to join the network and share knowledge, thus increasing the (European) added value of the logistics platform.
- Validate newly generated knowledge and translate excellent research and ideas into practice, resulting in innovation that can be applied in the market.
- Create awareness of the existence of SoCool@EU.
- Enable and ensure that there is an on-going reporting and presentation of the work and results of the SoCool@EU project to all the relevant stakeholders, rather than one set of reports with no continuous follow-up.
- Guarantee collaboration and involvement in European cluster initiatives such as the, European Cluster Alliance, the European Cluster Excellence Initiative, the European Innovation Platform for Clusters (Cluster-IP), and the European Cluster Observatory.
- Ensure that the suppliers of research and innovation are more easily able to communicate the value of their products and services to the industry and regional authorities.
- Ensure that the relevant European Union institutions and regional authorities that are in a position to allocate funds to programmes or to projects are aware of and give some priority to research applied to the sectors to which this project is focused on.
- Set up a public support for innovation and research in the sector, produced by an enhanced awareness in the regional, national, and European media of the importance of the sector from a socio-economic standpoint, and of the existence and work of SoCool@EU.
- Ensure that the priorities of the private and R&D sectors are considered relevant by the regional authorities for the establishment of the regional strategic plans.
- Increase the integration of SMEs in research driven initiatives facilitating knowledge sharing and business model awareness raising.
- Foster transnational cooperation between regional research-driven clusters in the areas of logistics and supply chain management.
- Provide a specific platform to facilitate and stimulate the dialogue for the development of skills and knowledge.
- Support research entities and SMEs to maximise the effectiveness from EU best practices projects and other national and international success stories and business models.

### ***3.2.1 Dissemination, Valorisation And/Or Exploitation Of Project Results***

The SoCool@EU dissemination policy will be naturally oriented towards the natural end-users of the project results that in this case involve R&D centres, SMEs and regional authorities. Other European groups will also be considered and targeted. These include European cluster initiatives and potential partners. A dynamic and interactive web-site will be used to boost information flow between all entities with an interest in the project. It will also be used to disseminate relevant information to targeted parties, including policy makers. All of the consortium members will take an active participation in the dissemination activities and ALIA will be the coordinator of all of the activities. The main means to ensure the effectiveness of the dissemination and exploitation (inside and beyond the consortium) are the following:

#### **➤ SoCool@EU Dissemination Plan**

The activities will include the tactical, strategic and operative elements of the dissemination, promotion, networking, valorisation of results and awareness raising. Result of this action will be a dissemination plan, which will detail the content and timing of the various dissemination activities, which will be pragmatically identified. These include also distribution channels, organisations and persons. The objectives will be to determine the target and the best ways to disseminate the project and its result and the best strategies to exploit and valorise the outputs of the project. The dissemination plan will also include structures for the

dissemination and information actions. It will be regularly updated to integrate new actions and objectives and for this reason its duration will be equal to the whole duration of the project.

➤ **SoCool@EU Web site**

The project will have a web-site which will use open source portal technologies to make statement and announcements and support dissemination of project deliverables, newsletters, brochure etc. by electronic methods such as PDF (Portable Document Format) documents as well as public online moderated discussions and internal project management and reporting. Consortium partners will be granted unlimited access to project insides and to confidential project material. Public web-site areas will be utilized to develop the user community and discussion and debate around wider topics addressed by the project. Hence, in addition to its pro-active internal communication role between the members of the project; its external role will be uniquely effective. The website will include:

- General and public information on the project activities and structure accessible to the general public: project abstracts, main results and news, which will also be sent in email newsletters to registered users.
- More detailed and regularly updated information based on project progress will be accessible by Advisory Board members. This includes detailed reports prepared by the consortium and the latest developments. It will be complemented by a special Advisory Board newsletter.
- Contact points of the entities involved: consortium members and all organisations involved.
- Links to web sites of interest to the project (companies, institutions, complementary work, other national and European initiatives connected to SoCool@EU) as well as a SoCool@EU literature database.
- Reference material and results produced within the project itself, including public deliverables.
- Calendar of important events (e.g. conferences, seminars, workshops and meetings) with related presentation material.

Other considerations about the website's functionalities are the following:

- Relevant stakeholders will be able to access to wider information (i.e. library, company information, links to services) by logging in. This log in process will be user-friendly.
- Before obtaining the user ID and password, users have to fill in a form with their personal details. This mechanism will allow the creation of a database, which will be used by the web administrator to disseminate the project activities and provide 'ad hoc' services to the different category of participants.
- Classified approach and appropriate mean of information flow will allow to give a clear message to each individual and to make the dissemination more effective as it will equally reflect and cover the need of various stakeholders both private and public.
- The intention is that the website will have a lifetime longer than the project life time.
- All information in the website will be disseminated in an understandable and attractive manner in order to ensure a wide participation of the market players and the research community.

➤ **Events**

During the lifetime of the project we will organize different types of events with the objectives of exchanging knowledge, networking and disseminating the results of the projects.

○ **SoCool@EU Seminars**

In our organised SoCool@EU seminars we will transfer the practical gained knowledge to a setup of a combination of interested R&D providers, SMEs in the logistics and transportation sectors and regional authorities. These small workshops are aimed to present and discuss real-life problems within the intermodal transportation and logistics processes to identify the necessities of every stakeholder. Also, these events will create the opportunity to inform the stakeholders about the European strategies in these sectors and to learn about the experiences of other regional clusters. At least two of these seminars will take place in the Region of Mersin in order to provide an ideal framework for mentoring. A total of 3 seminars will be organised and at least one will take place in the Mersin Region in order to assure the maximum involvement of the mentoring region.

- **SoCool@EU Executive courses**

Several of the consortium members have a wide experience with executive courses in a range of areas of logistics, supply chain management and transportation. These courses will be directed towards industry participants that will be crucial to guarantee the success of the implementation of the Strategic Action Plan. One executive course will be carried out in each region.

- **SoCool@EU Conference**

A closing event will be organised, bringing together stakeholders, experts, academics, etc. in the logistics and supply chain field, and educating this audience about the experiences of SoCool@EU and sharing the lessons learnt.

Also, the consortium members will participate in external events in order to present the activities of the project, such as the Rotterdam “Port Days”, HOLM Forum, the annual “Mersin International Logistics Conference PILOT, INFORMS, POMS etc. Finally, considering the fact that the EC will not fund Open business partnering events under this call the consortium will collaborate with the Europe INNOVA to take advantage of the opportunities offered by this initiative.

➤ **Advisory Board**

An Advisory Board will be created and managed throughout the whole project duration. It will consist of a number of high level representatives from the transport and regional development sector, organisations, platforms, etc., and involves members from both public and private sectors to secure endorsement of the activities and to strengthen the dissemination impact. The members of the AB will be informed ad hoc via tailored made papers in order to facilitate their participation and understanding of the project development. Also brain storming sessions will be organised via phone/video conferences in conjunction with important milestones of the projects, in order to keep a constant communication flow with the Board and keep them constantly updated on project developments.

➤ **Participation In European Cluster and Regions Initiatives**

Close consultation with relevant regulatory bodies as well as relevant public and private interest groups within the EU will be carried out, to ensure that the Framework of SoCool@EU is promoted as effectively as possible and that opportunities for knowledge transfer into related activities are achieved. This will be particularly relevant during the implementation of the Joint Action Plans. The European Commission has launched a number of cluster related projects and initiatives aiming at the improvement of cluster policy within Europe and improving the efficiency of existing efforts in cluster management. The project consortium will become part of the **European INNOVA** community through their participation in the **European Cluster Alliance**, the **European Cluster Excellence Initiative**, the **European Innovation Platform for Clusters (Cluster-IP)** and the **European Club of Clusters Managers** as an additional support to the dissemination of the project results and implementation of the Joint Action Plan in the future. Also, it will liaise with relevant cluster partnerships under the **European Innovation Platform for Clusters** established and provide project descriptions and relevant data to be collected in the framework of the **European Cluster Observatory**. Dinalog, ALIA, Øresund Logistics and HOLM (through the Centre for Cluster and Competitiveness) are all participating in this observatory. Also, through the participation in the AB and the involvement of the Region of Aragón in the **European Regions Research and Innovation Network (ERRIN)** the project cluster will have a voice in their debates with EU institutions and participates in EU policy consultations. In addition, the already established collaboration with the **European Road Transport Research Advisory Council (ERTRAC)** and the **European Intermodal Research Advisory Council (EIRAC)** will provide the opportunity to participate in the debates about the continuing challenges of road transport and European competitiveness and the EIRAC Strategic Intermodal Research Agenda (SIRA).

In order to achieve any effective impact from the project, the So-Cool@EU consortium believes that it is necessary to communicate and collaborate closely with appropriate and recognised European bodies. It is obvious that the Advisory Board will serve in this respect, because of their previous experience in dissemination activities and their relevant contacts and links with other representative entities.

➤ **REGIONAL USER GROUPS**

A group of active project participants outside consortium members and on a regional level will be expanded with user groups to ensure user involvement and input, targeted validation of project results and a wide impact.

➤ **General Networking**

The satisfactory quality of the activities and outcomes will be ensured by the partners involved in the international and regional clusters, who, in addition to their technical capabilities, have wide networking contacts, experience and know-how in dissemination and awareness raising activities. A key value of the relationships of the consortium partners is the multiplier effect that can be achieved through their respective networks. These contacts will form the basis for a widespread dissemination of excellence and knowledge, not only in Europe but also beyond. Other valuable sources of dissemination channels will also be represented by the members of the Advisory Board. The project partners all have a significant experience in working with SMEs which allows the project to directly involve end-users. Also, the support demonstrated by the Unioncamere Piemonte (see support letter) who forms part of the European Enterprise Network allows the project to interact with the community of the European SMEs from the beginning of the project.

Other networks and platforms available for dissemination are:

❖ **Dinalog**

Dinalog itself is set up in order to transfer knowledge to logistics industry (including SME) throughout the Netherlands via regional activities (workshops, lectures, etc). Additionally, Dinalog closely collaborates with Dutch line organisations and SME networks, such as NDL/HIDC (Holland International Distribution Council, TLN (Transport and Logistics in the Netherlands), KNV (Netherlands organisation for transport companies), EVO (organisation of shippers), and with the Flemish 'Vlaams Instituut voor Logisiek' (Flemish institute for logistics) that organises 250+ member companies. The links are at an operational level, but are secured via the membership of lead players of these organisations in the board of Dinalog.

❖ **HOLM**

By its size and number of members HOLM has gained national and international attention. HOLM therefore is closely cooperating with other national logistics and supply chain platforms such as Logistics Council Germany (LCG), Bundesvereinigung Logistik (BVL), Deutsches Verkehrsforum, Deutsche Verkehrswissenschaftliche Gesellschaft (DVWG) and others more. HOLM is represented in a number of national and international transport related fairs and conferences such as transport logistic in May in Munich and the German Logistics Conference in Berlin in October. Furthermore HOLM collaborates with the Council of Supply Chain Management Professionals (CSCMP), the Asia Pacific Logistics Institute in Singapore, CEIBS China and the Indian Institute of Management in Bangalore in setting up conferences and fairs. At the Frankfurt Airport HOLM runs the HOLM Forum, a permanent forum for the presentation and discussion of logistics and transport topics that is open to the public, to experts and to international delegations. The annual ZEIT Conference Logistics & Mobility which is organized by HOLM and the weekly newspaper DIE ZEIT is the most renowned conference on that topic in Germany. In September 2010 Prof. Christian Ketels (Harvard Business School), Prof. Prashant Yadav (MIT Zaragoza) and Prof. Robert de Souza (Asia Pacific Logistics Institute) discussed the role of logistics clusters for the world economy at the ZEIT Conference.

❖ **ALIA.**

ALIA is inscribed in the European Cluster Observatory and will be collaborating with other regional clusters such as CAAR and IDIA. Also, the individual participants of ALIA have established connections that will be of importance for the dissemination of the CO-COOL@EU project both on an individual level as well as through their collaborative projects. One of the sponsors of Zaragoza Logistics Centre (ZLC) is PLAZA, S.A. that establishes the connection to the logistics community of the Region of Aragón and to the other Logistics Platforms of the region, and private initiatives such as Mercazaragoza,



Ciudad del Transporte, Parque Tecnológico de Reciclado, etc. Furthermore, ZLC is the headquarters of the Spanish National Centre of Excellence in Logistics, CNC-LOGISTICA, established by the Spanish Ministry of Science and Education and the coordinator of Logistop, the Spanish Technology Platform in Logistics, Intermodality and Mobility. Through these initiatives the centre has established a connection with a wide range of R&D centres, companies, universities, etc. on a national level. Also, both CNC-LOGISTICA and ZLC have a wide network of European contacts in the area of transport due to their participation in the European Intermodal Research Advisory Council (EIRAC) and CNC-LOGISTICA participates actively in the Spanish Forum for the European Road Transport Research Advisory Council (ERTRAC) and in work groups for ERTRAC Europe. Also, on a European level the ZLC as well as the City Hall of Zaragoza are members of the CIVITAS Network which includes cities that are committed to introducing ambitious, clean urban transport strategies. On a global level, ZLC belongs to the MIT Global Scale Network. This unique Network will allow faculty, researchers, students and affiliated companies from all participating centres to pool their expertise and collaborate on projects that will create supply chain and logistics innovations with global applications. Also, several researchers of ZLC are members of the international Council of Supply Chain Management Professionals (CSCMP). - . AREX has wide contacts with local SMEs as well as with European SME associations. Also, through the establishment of their office in Brussels has a big network of connections within the European Commission. ITA pertains to several regional clusters such as TECNARA and IDIA .

Finally, Red Aragón 7PM are members of ERRIN, the European Regions Research and Innovation Network, which is a dynamic network of more than 90 EU regions and their Brussels-based offices.

#### ❖ **Øresund Logistics**

Øresund Logistics is a network based cluster organisation which acts as a platform for knowledge sharing and cooperation among the stakeholders in the region. Knowledge sharing and disseminating activities include workshops, conferences, seminars, publication of reports and establishing projects which focus on knowledge gathering and dissemination. One of these projects is Øresund EcoMobility, in which more than 40 experts work in knowledge sharing networks within the thematic areas: city transport, long distance freight and sustainable energy carriers (see [www.oresundecomobility.org](http://www.oresundecomobility.org)). Øresund Logistics cooperates closely with the Øresund Committee which is a political cooperation between the 3 regional authorities and 79 municipalities in order to foster the Øresund Regional Development Strategy (ØRUS) within the area of Green Corridors. Øresund Logistics is lead partner of the newly established Femern Belt Logistics Platform (see [www.femernlogistics.org](http://www.femernlogistics.org)), which is a triple-helix cluster organisation for the Danish-German Femern Belt Region, which will be strengthened with the establishment of the Femern Belt Link in 2020. In this context Øresund Logistics cooperates with the Femern Belt Business Council (see [www.FBBC.eu](http://www.FBBC.eu)) and the STRING cooperation ([www.balticstring.net](http://www.balticstring.net)) in order to promote sustainable and efficient logistics in the STRING axis between Northern Germany and Scandinavia across the Femern Belt (Green Corridors). Øresund Logistics is partner in the TransBaltic and Scandria projects, which both aim at promoting sustainable freight and have a huge amount of partners from northern Europe and the Baltic sea area (See description below). Øresund Logistics is furthermore a part of Øresund Science Region – an umbrella organization for four cluster organizations in the areas of Environment, ICT, Food science and Logistics, which all have extensive triple-helix networks within their thematic areas.

#### ❖ **MTSO**

As Mersin Logistics Platform is the first logistics initiative of the Turkey region to increasing the capacity of Mersin to its potential logistics sector by using clustering policies with the support of Undersecretaries of the Prime Ministry for Foreign Trade, Ministry of Transport, International Transport Association, Logistics Association which are among the key actors of logistics sector in Turkey. Therefore, the outcomes and knowhow of project will be easily disseminating through the assistance of listed organization in all over Turkey. Additionally, knowledge sharing and disseminating activities include workshops, conferences, seminars, publication of reports, logistics companies visit and establishing projects which focus on knowledge gathering and dissemination to the logistic



industry and sector. Therefore MTSO itself is set up in order to transfer knowledge to logistics sector (including SME) throughout regional activities (workshops, lectures, etc).

Also, the consortium will consider the following European projects dealing with Logistics, Supply Chain Management, Intermodal Transportation and/or regional development for clustering purposes (among others):

- **bestLog** - The European Platform for Supply Chain Management Best Practice. Since the official end of the bestLog project in May 2010 bestLog is run by the European Logistics Association through ELAbestlog. [www.bestlog.org](http://www.bestlog.org)
- **PROMIT** is a European Coordination Action (CA) for intermodal freight transport initiating, facilitating and supporting the coordination and cooperation of national and European initiatives, projects, promotion centres, technology providers, research institutes and user groups related to this most complex transport form. <http://www.promit-project.net/>
- **TransBaltic** – Towards an integrated transport system in the Baltic Sea Region – is a transnational project and it has been granted a strategic status by the authorities of the EU Baltic Sea Region Programme 2007-2013. The overall objective of this project is to provide regional level incentives for the creation of a comprehensive multimodal transport system in the BSR by means of joint transport development measures and jointly implemented business concepts. <http://transbaltic.eu/>
- **CADIC**. Based on the IC flow model, the CADIC framework provides methods and tools to support IC-based collaboration between SMEs, including a training programme for the roles Cluster Facilitator (cluster-level) and Cluster Manager (company-level) supporting catalyst SMEs in managing cluster activities.
- **FREIGHTWISE**, an IP project on Management Framework for Intelligent Intermodal Transport. <http://www.freightwise.info>
- **CAESAR**, a Coordination Action for an Intermodal strategic research agenda. Establishment of EIRAC. <http://www.eirac.eu>
- **NeLoC**, Networking Logistics Centres in the Baltic Sea Region. The principal aim of this project funded by the Baltic Sea Region INTERREG III B programme is to promote networking of existing and planned logistics centres in the Baltic Sea Region (BSR). <http://www.neloc.net>
- **STARNETregio** has been conceived to increase the overall capacity of regional players in the regions Friuli Venezia Giulia (Italy), Slovenia and the County of Rijeka (Croatia) to invest in RTD and carry out research activities concerning the marine industry, in specific the shipbuilding and port equipment, intended to strengthen and develop the sector. <http://www.starnetregio.eu/>
- **AGroFOod** clusters platform with common long-term research and innovation strategy towards economic growth and prosperity. Coordinated by the Mersin Region. <http://www.foodclusterinitiative.eu>
- **Scandria** is a cooperation of 19 partners from Germany and Scandinavia which works towards developing a green and innovative transport corridor between the Baltic and the Adriatic Sea as well as to promote a new European economic core area ([www.scandriaproject.eu](http://www.scandriaproject.eu)).
- **EWTCII** - East West Transport Corridor II is an international cooperation that aims at developing efficient, safe and environmentally friendly handling of the increasing amount of goods going east-west in the south Baltic region ([www.eastwesttc.org](http://www.eastwesttc.org)). Øresund Logistics is partner in the TransBaltic and Scandria projects and cooperates with EWTC II project in the framework of the joint cooperation between Scandria, TransBaltic and EWTCII within Green Corridors.
- **CODE24** intends the interconnection of economic development, spatial, transport and ecological planning along the trans-European railway axis (TEN-T) no. 24 from Rotterdam to Genoa. Corridor 24 covers a number of the most important economic regions in Europe. CODE24 aims at a coordinated transnational strategy to support the improvement and the development of the corridor. The major European north-south transport axis across the Netherlands, Germany, Switzerland and Italy is linking the North Sea port of Rotterdam and the Mediterranean port of Genoa. Its catchment area comprises 70 million inhabitants and operates 50% (700 million tons/year) of the north-south rail freight. The opening of the Lötschberg Tunnel in 2007 and the Gotthard Tunnel (expected in 2017) and the parallel

expansion of the feeders will further improve the importance of Corridor 24 (<http://www.code-24.eu/>).

- CASTLE was born to answer regional needs to improve SMEs logistics policies. It relies on a solid past cooperation among ten partners in Italy, Poland, Greece, Slovenia, Spain, Germany, Hungary & Austria, especially developed in Interreg initiatives. The Acronym CASTLE stands for “Cooperation Among SMEs Toward Logistic Excellence”. The CASTLE objectives and ratio are rooted in past research & study activities on the regional logistics EU status and perspectives, which elected SMEs logistics networking as a priority intervention area for public policies (<http://www.castle-project.eu/>).

### ➤ **Other Dissemination Channels**

**Brochure.** The project brochure will be multilingual, written in major EU languages. It will specifically draw readers to the SoCool@EU’s activities and web site. Since the brochure is to have a lifespan that will encompass the whole duration of the project it will be written in an open style, such that it is fresh and appealing even after one or two years. It will also be available in PDF format and downloadable via the web site.

**Newsletters.** An informative newsletter detailing the project will be produced. The newsletter will be distributed by mail and email to the database maintained by partners. It will also be available as a compact Adobe Acrobat (i.e. PDF) format for download from the portal. It will offer the mean to report unfolding developments during the course of the project. Its aim will be also to maintain interest in the topics related to logistics, supply chain management, clusters and regional development by highlighting “hot” news from SoCool@EU emerging during the interim, rather than concentrating in technical details only. It will contain amongst other things:

- SoCool@EU versions of project press releases
- Announcements of progress by single partners or workgroup collaborators
- Reports on conferences and meetings
- News of milestone achievements
- Personnel announces
- Information about forthcoming events
- News on research and pragmatic developments in manufacturing related issues from all over the World

**Poster.** SoCool@EU posters will be used to provide an eye-catching and thought-provoking presentation, and to include contact or website details giving ready access to further information. It will be printed and used at exhibitions, conferences, fairs and public meetings. It will be also available in PDF format and downloadable via the web site.

**CD-ROM/DVD.** The project’s public deliverables will be available on CD ROMs providing HTML based navigation. A multi-media DVD based presentation of the project and its results will be developed towards the end of the project. It will provide a summary of the project’s findings and include video clips from the cases and music as appropriate and will be designed to support as wide a range of operating systems. It will be handed out at conferences and workshops, and be posted on the website.

**Video.** The project will be enriched with a short video which will be widely disseminated via different channels including web streaming. The video will be produced in different formats so to ensure the most effective dissemination and the highest quality.

**Mass media.** The project will make use of the mass media to share the relevant information of the project. The editorial coverage in the press, or on TV and radio, reaches very large audiences and the consortium partners will make use of regional, national and European media. The consortium will make use of the media mailings lists of the EC and will get in contact with the Information and Communications Unit of the EC that invites journalists to frequent thematic press briefings.

**External websites.** The SoCool@EU project activities will also be distributed through external websites to improve the communications. The consortium members will submit press related to the project to the



European Commission's information service on European research and innovation activities in order to have them published in the CORDIS Wire, AlphaGalileo, EurActiv.com websites. Also, regional sites, such as Aragón Investiga, etc. will be taken into use.

### **3.2.2 IPR Management**

The leading principle concerning Intellectual Property Rights (IPR) will be that all partners will retain IPR over their own work and innovations before joining the SoCool@EU consortium and a formal Consortium Agreement covering general collaborative agreements and ownership of results will be signed by all SoCool@EU partners, both international as well as regional. The IPR part of the Consortium Agreement will describe:

- Procedures for the ongoing identification, tracking and registration of knowledge as it is produced.
- Measures for the adequate and effective protection for knowledge that is capable of industrial or commercial application.
- Procedures for publications of knowledge produced by the project to ensure that it will not affect the protection of that knowledge.

If required for the progress of the development of the project local interim licensing agreements will be put in place between partners should the need arise to exchange software. These Licensing agreements will cover the exchange of specific versions of developed software at zero license fees, the use of databases as compiled by individual partners, and access to all data for the purpose of validation. The aim will be to ensure that no impediment exists to the development and validation of the methodologies and software.



## B4. Ethical issues

Research on Human Embryo/Foetus		YES	Page
	Does the proposed research involve human Embryos?		
	Does the proposed research involve human Foetal Tissues/ Cells?		
	Does the proposed research involve human Embryonic Stem Cells (hESCs)?		
	Does the proposed research on human Embryonic Stem Cells involve cells in culture?		
	Does the proposed research on Human Embryonic Stem Cells involve the derivation of cells from Embryos?		
	I CONFIRM THAT NONE OF THE ABOVE ISSUES APPLY TO MY PROPOSAL	X	

Research on Humans		YES	Page
	Does the proposed research involve children?		
	Does the proposed research involve patients?		
	Does the proposed research involve persons not able to give consent?		
	Does the proposed research involve adult healthy volunteers?		
	Does the proposed research involve Human genetic material?		
	Does the proposed research involve Human biological samples?		
	Does the proposed research involve Human data collection?		
	I CONFIRM THAT NONE OF THE ABOVE ISSUES APPLY TO MY PROPOSAL	X	

Privacy		YES	Page
	Does the proposed research involve processing of genetic information or personal data (e.g. health, sexual lifestyle, ethnicity, political opinion, religious or philosophical conviction)?		
	Does the proposed research involve tracking the location or observation of people?		
	I CONFIRM THAT NONE OF THE ABOVE ISSUES APPLY TO MY PROPOSAL	X	

Research on animals		YES	Page
	Does the proposed research involve research on animals?		
	Are those animals transgenic small laboratory animals?		
	Are those animals transgenic farm animals?		
	Are those animals non-human primates?		
	Are those animals cloned farm animals?		
	I CONFIRM THAT NONE OF THE ABOVE ISSUES APPLY TO MY PROPOSAL	X	

Research Involving ICPC Countries		YES	Page
	Is the proposed research (or parts of it) going to take place in one or more of the ICP Countries?		
	Is any material used in the research (e.g. personal data, animal and/or human tissue samples, genetic material, live animals, etc): a) Collected in any of the ICP countries? b) Exported to any other country (including ICPC and EU Member States)?		
	I CONFIRM THAT NONE OF THE ABOVE ISSUES APPLY TO MY PROPOSAL	X	

Dual Use		YES	Page
	Research having direct military use		
	Research having the potential for terrorist abuse		
	I CONFIRM THAT NONE OF THE ABOVE ISSUES APPLY TO MY PROPOSAL	X	

## B5. Consideration of gender aspects

The world of transport and logistics is traditionally a “man’s world”, which results in a comparable representation of women in the consortium. However, there are several examples of female leadership in the various clusters: the Deputy Chairperson, the Cluster Manager Logistics and an engineer in Transport Planning and Traffic Engineering at HOLM; the Financial Controller at Dinalog; six researchers and professors and 3 PreDocs at Zaragoza Logistics Centre; and three professors in the NGIL Board are female professionals that will play a valuable role in implementing the SoCool@EU project. Special attention will be given to inviting female future members of the Advisory Board.

### Gender within the project

Transport and logistics is one of the sectors with very few female employees (14-20%). This is mostly the result of irregular working hours, distance from home/family, and an environment that is not very woman-friendly. However, in The Netherlands and Belgium, this employment number rose to 22% in 2008 – most likely because of an increase in transport-related activities which are confronted less with difficult working hours or problems of distance and working environment. Research<sup>5</sup> has shown that actions are necessary to achieve more gender equality in the sector. Mixed gender teams have proven to perform better in cooperation. To encourage women to go for a career in logistics, companies should focus more attention on their own profile, and they could give more support to existing female employees and their career prospects. Educational institutes could play a bigger role in promoting the logistics sector, since they can be influential to some extent in the career choice of their students. The partners will promote gender equality within the frame of the project to address the EC goal of reaching a 40% participation of women at all levels, in research programmes. Particularly, in the Joint Action Plan to be drawn up, consortium partners will pay attention to the gender aspect and incorporate a focus on a better gender balance where there is an opportunity.

The project will therefore be gender-neutral (without any reason to discriminate any gender) and gender-equality rights are in focus. Our project is therefore on line with the EU policy to leverage the equality between men and women and to give the same job opportunities for men and women, based on their competencies and skills and without any segregation of sex issues. In particular, the Project Management Committee, which is in charge of monitoring the progress of the overall project, will also have the task of solving any gender-related issue:

- Address the involvement of women, as much as men.
- Adopt the appropriate measures encouraging women participation in the management of the project, in order to achieve a balanced representation.
- Support the implementation of the recommendations produced by the European Technology Assessment Network (ETAN) as well as by the “Helsinki Group” on the development and production of statistics and indicators, about the situation of women in scientific research.
- Ensure balanced representation of female/male in all images and visuals used in dissemination material (DVD, website, flyers, presentations etc.)

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<sup>5</sup> Europhia Consulting Global Logistics HR Survey Series. April, 2008



## Annex 1. Letters of Intent – Advisory Board

**ERRIN** European Regions  
Research and Innovation Network



Sustainable Organisation between Clusters Of Optimised Logistics @ Europe  
“SO-COOL@EU”

### *Letter of Intent*

The SO-COOL@EU project combines the strengths of five EU regions and aims to create an open European platform for EU excellence in sustainable and competitive supply chains and logistics connected with hubs and gateways.

I hereby express my intention to actively participate in the Advisory Board of the SO-COOL@EU project by providing input, feedback and expert advice for the project implementation.

Name : Richard Tuffs

Organization : ERRIN (European Regions Research and Innovation Network)

Function : Director

Signature :

[www.errin.eu](http://www.errin.eu)





## EXPRESSION OF INTEREST

### Sustainable Organisation between Clusters Of Optimised Logistics @ Europe "So-Cool@EU"

**From:** Prof. Christian H. M. Ketels,  
Member of the Faculty, Harvard Business School  
Principal Associate, Institute for Strategy and Competitiveness;  
Senior Fellow at the Center for Strategy and Competitiveness at the Stockholm  
School of Economics

**Date:** December 3, 2010

**To:** Prof. Dr. Stefan Walter  
House of Logistics and Mobility (HOLM)  
Jean-Gardner-Batten Straße 8  
D-60549 Frankfurt am Main/Gateway Gardens

Dear Prof. Walter,

I hereby express my personal interest in the So-Cool@EU project which is proposed by your organization and consortium within the 7<sup>th</sup> European research and technological development framework programme.

My research focus lies on the relationship between company strategy and location and on competitiveness at different geographic levels, especially in Europe. I participate in clusters and competitiveness activities all over the world, as a leader of cluster-related projects, a member of advisory boards, and author of thematic documents and articles on economic and cluster policy issues, and as a speaker on competitiveness and strategy. My expertise and experience can be rewardingly integrated in the So-Cool@EU project.

Should the proposal be successful, I would like to constitute a member of the Advisory Board and receive regular information about the progress of 'So-Cool@EU' results and events. I would also consider the possibility to involve myself in the project, e.g. through contributing scientific content in forums, events, discussion groups, and decisions.

Yours sincerely,

Prof. Dr. Christian Ketels

Sustainable Organisation between Clusters Of Optimised Logistics @ Europe  
**"SO-COOL@EU"**

***Letter of Intent***

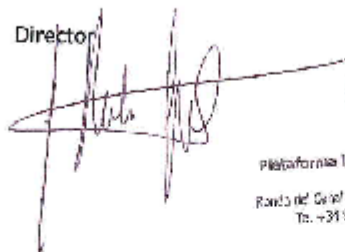
The SO-COOL@EU project combines the strengths of five EU regions and aims to create an open European platform for EU excellence in sustainable and competitive supply chains and logistics connected with hubs and gateways.

I hereby express my intention to actively participate in the Advisory Board of the SO-COOL@EU project by providing input, feedback and expert advice for the project implementation.

Name : Mr. Ricardo García Becerril  
Organization : Plataforma Logística de Zaragoza – PLAZA, S.A.

Function : Director

Signature :



Plataforma Logística de Zaragoza, PLAZA, S.A.  
CIF: A-09091012  
Ronda del Canal Imperial de Aragón, 61-1 50197 ZARAGOZA  
Tel: +34 976 20 50 30 - Fax: +34 976 40 51 79



Sustainable Organisation between Clusters Of Optimised Logistics @ Europe  
"SO-COOL@EU"

***Letter of Intent***

The SO-COOL@EU project combines the strengths of five EU regions and aims to create an open European platform for EU excellence in sustainable and competitive supply chains and logistics connected with hubs and gateways.

I hereby express my intention to actively participate in the Advisory Board of the SO-COOL@EU project by providing input, feedback and expert advice for the project implementation.

Name : Miguel Angel Romeo Marco

Organization : SAICA

Function : Chief Operations WP Paper  
Logistop Board Member

Signature :



**Sustainable Organisation between Clusters Of Optimised Logistics @ Europe  
"SO-COOL@EU"**

***Letter of Intent***

The SO-COOL@EU project combines the strengths of five EU regions and aims to create an open European platform for EU excellence in sustainable and competitive supply chains and logistics connected with hubs and gateways.

I hereby express my intention to actively participate in the Advisory Board of the SO-COOL@EU project by providing input, feedback and expert advice for the project implementation.

Name : **Mats Boll**

Organization : **AB Volvo**

Function : **Transport Policy Director**

Signature : 

## Annex 2. Letters of Interest



### EXPRESSION OF INTEREST

Sustainable Organisation between Clusters Of Optimised Logistics @ Europe  
"So-Cool@EU"

**From:** Belgrade Chamber of Commerce  
Marija Aukovic Matic  
ul. Kneza Milosa 12 (Ileandarija 211, II sprat)  
11000 Belgrade - Serbia

**Date:** December 2, 2010

**To:** Wim Bens  
Dutch Institute for Advanced Logistics – Dialog  
Prinsenhageaan 13  
4815 DA Breda - The Netherlands

Dear Mr. Bens,

We, hereby express our interest on behalf of the Belgrade Chamber of Commerce in the So-Cool@EU project which is proposed by your organization within the 7<sup>th</sup> European research and technological development framework programme.

The Belgrade Chamber of Commerce has successfully participated in several the EU funded projects, that are relevant for the So-Cool@EU project:

- **NEW MODELS OF CLUSTER DEVELOPMENT IN THE BALKANS** – (Law 84, financed by the Italian Government). Belgrade Chamber of Commerce was the only partner from Serbia (other partner countries – Romania, Montenegro). The aim of the project was transfer of know-how about clusters in wood and textile industries and establishment of cooperation between Italian and Serbian companies from these industries.
- **ADRIANET** – Adriatic Network for Institutional Cooperation (INTERREG III A / CARDS). The general objective was the exchange of best practices aiming at the systems harmonization between different local management systems. Institution building was enhanced through the promotion of a structured process of cooperation within entities acting in the different geographic areas. The sectors involved were transportation and SMEs.
- **CO&CO CHAMBERS** ( INTERREG III A/ CARDS), realised in cooperation with Italian partners. Its main goal was internationalisation of Serbian SMEs.



Therefore, should the proposal be successful, we would like to receive regular information about 'So-Cool@EU' results and events. We would also consider the possibility to involve our members in the project as external parties, e.g. through forums or discussion groups.

Yours sincerely,

Belgrade Chamber of Commerce  
Marija Askovic Matic  
Deputy Secretary of the Transport and Telecommunications Association





## EXPRESSION OF INTEREST

### Sustainable Organisation between Clusters Of Optimised Logistics @ Europe "So-Cool@EU"

**From:** Institute of Logistics and Warehousing (ILIM)  
Dr. Grzegorz Szyszka  
Director  
ul. E. Estkowskiego 6  
61-755 Poznan - Poland

**Date:** December 3, 2010

**To:** Wim Bens  
Dutch Institute for Advanced Logistics – Dinalog  
Princenhagelaan 13  
4813 DA Breda - The Netherlands

Dear Mr. Bens,

I hereby express my interest on behalf of ILIM in the So-Cool@EU project which is proposed by your organization within the 7th European research and technological development framework programme.

The Institute of Logistics and Warehousing is a market-oriented research and development unit which functions as a competence centre in logistics and e-economy. We develop, promote and implement innovative solutions for logistics in key business processes, thus increasing the functional effectiveness of companies and complete delivery chains. The Institute assists in obtaining subsidies from, EU funds for the projects which are serviced by the Institute, as it is accredited in the area of consulting services centre of the National System of Services for the programmes aimed at small and medium businesses. Also, since 1990 we have been managing the Global System EAN.UCC in Poland as the national organisation EAN POLSKA. The Institute is the founder of ECR Polska Club which associates companies creating common standards and solutions aiming at improving the effectiveness of customer service in delivery chains. The Institute initiated the foundation of the Logistics College (Wyższa Szkoła Logistyki). We also deal with the Certification of Logistics Specialists in Poland on the Junior and Senior level as the only representatives of the European Certification Board for Logistics - ECBL. The publishing activities of the Institute serve the purpose of the popularisation of logistics and introducing innovative logistics solutions in companies. The Institute publishes the magazine LOGISTYKA, and the publication series BIBLIOTEKA LOGISTYKA (LOGISTICS LIBRARY).

Therefore, should the proposal be successful, we would like to receive regular information about 'So-Cool@EU' results and events. We would also consider the possibility to involve our members in the project as external parties, e.g. through forums or discussion groups.

Yours sincerely,

Dr. Grzegorz Szyszka  
Director  
Institute of Logistics and Warehousing



## EXPRESSION OF INTEREST

### Sustainable Organisation between Clusters Of Optimised Logistics @ Europe "So-Cool@EU"

From: Spanish Technology Platform on Logistics, Intermodality and Mobility, Logistop  
Fernando Liesa  
Calle Bari, 55  
Edificio Náyade, Bloque 5, PLAZA  
50197 Zaragoza (SPAIN)

Date: December 3, 2010

To: José Luis Carreras Lario  
Agrupación Logística de Innovadora, ALIA  
Pasco Isabel La Católica nº2  
50009 Zaragoza (Spain)

Dear Mr. Carreras Lario,

We, hereby express our interest on behalf of the Spanish Technology Platform on Logistics Intermodality and Mobility, Logistop, in the So-Cool@EU project which is proposed by your organization within the 7<sup>th</sup> European research and technological development framework programme.

Logistop is recognized by the Spanish Ministry of Science and Innovation. It is a network of main stakeholders (580 members), including companies (44%): 3PLs, Retail, ICT, Freight and Passengers Transportation in all modes, Logistics Infrastructure such as ports, airports and other freight terminals, Manufactures and Shippers; R&D organizations, universities, research and technology centers as well as public administration in R&D, transportation, mobility and cities. In this regard, Logistop can actively contribute in the dissemination of the results of this project.

Should the proposal be successful, we would like to receive regular information about 'So Cool@EU' results and events. We would also consider the possibility to involve our members in the project as external parties, e.g. through forums or discussion groups.

Yours sincerely,



logistop

PLATAFORMA TECNOLÓGICA EN LOGÍSTICA INTEGRAL,  
INTERMODALIDAD Y MOVILIDAD  
Calle Bari, Edificio 5 (Náyade) - PLAZA  
50197 Zaragoza (SPAIN)

Spanish Technology Platform on Logistics Intermodality and Mobility, Logistop  
Fernando Liesa  
Coordinator



## EXPRESSION OF INTEREST

### Sustainable Organisation between Clusters Of Optimised Logistics @ Europe "So-Cool@EU"

From: City of Niš  
Office for Local Economic Development  
Ms. Stela Jovanović  
Republic of Serbia, 18 000 Nis  
Obrenoviceva 38 1st floor

Date: December 2, 2010

To: Wim Bens  
Dutch Institute for Advanced Logistics – Dinalog  
Princenhagelaan 13  
4813 DA Breda - The Netherlands

Dear Mr. Carreras Lario,

We, hereby express our interest on behalf of the City of Nis in the So-Cool@EU project which is proposed by your organization within the 7th European research and technological development framework programme.

The City of Niš is the crossroads of the most important Balkan and European traffic routes. The territory of the City is intersected by three important directions of international road and railway traffic – several roads that connect the Balkans with Central and Western Europe, including Corridor X, and the axis which connects the Adriatic, Aegean and Black Sea intersect the territory of City of Niš.

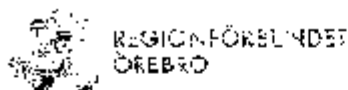
The Office for Local Economic Development has identified in their Agenda 21 Development Strategy the areas of transportation and inter-modality as relevant for their region. Also, They have participated in a project for regional development funded by the European Commission - EU Region EUROBALKANS.

Therefore, should the proposal be successful, we would like to receive regular information about 'So-Cool@EU' results and events. We would also consider the possibility to involve our members in the project as external parties, e.g. through forums or discussion groups.

Yours sincerely,



Ms. Stela Jovanović  
City of Niš  
Office for Local Economic Development



## EXPRESSION OF INTEREST

### Sustainable Organisation between Clusters Of Optimised Logistics @ Europe "So-Cool@EU"

From: Regionförbundet Örebro  
Örebro Regional Development Council  
Mr. Berndt Arvidsson  
Development Manager - International strategy Infrastructure  
701 83 Örebro - Sweden

Date: December 2, 2010

To: José Luis Carreras Lario  
Agrupación Logística de Innovadora, ALA  
Paseo Isabel La Católica nº2  
50009 Zaragoza (Spain)

Dear Mr. Carreras Lario,

We, hereby express our interest on behalf of the Örebro Regional Development Council, in the So-Cool@EU project which is proposed by your organization within the 7<sup>th</sup> European research and technological development framework programme.

In 2006, Örebro County Council, Regional Development and the Association of Local Authorities in Örebro County, together with all 12 municipalities in the county, set up Örebro Regional Development Council as a municipal council for regional development. The overall task of this Council, is to gather Sweden's resources in regional politics into an effective, democratically controlled organisation. The purpose and task of the organisation is to improve conditions for sustainable growth and to contribute to the best possible quality of life throughout the whole of Örebro County. Also, the Regional Council is the members' body for co-operation in regional development issues and for securing democratic acceptance of the regional development work. The Council works to ensure that the organisations in Örebro County that are working with regional development issues co-ordinate their activities. In this context the Council will organise arenas where different regional players can meet to develop Örebro County and to introduce new discussion and meeting forms that stimulate creative problem-solving. The Council will also conduct external monitoring and examine the development of know-how in the areas for which the Council is responsible. The other tasks of the Council include, from 2007, taking over state tasks which today are handled by the county administrative board. This applies, for example, to formulating programmes for the development of the county which the municipalities and the county council intend to run in co-operation with other parties and to co-ordinate development in the county in order to implement the programme. The Regional Council will also decide on the use of certain government funds for regional development and on prioritisation among infrastructural measures etc. when drawing up county plans for the regional infrastructure.



REGIONFÖRBUNDET  
ÖREBRO

Should the So-Cool@EU proposal be successful, we would like to receive regular information about 'So-Cool@EU' results and events. We would also consider the possibility to involve our members in the project as external parties, e.g. through forums or discussion groups.

Yours sincerely,

Örebro Regional Development Council  
Mr. Berndt Arvidsson  
Development Manager - International strategy Infrastructure



## EXPRESSION OF INTEREST

Sustainable Organisation between Clusters Of Optimised Logistics @ Europe  
"So-Cool@EU"

From: Coordinator of TransBaltic Project  
Mr. Wiktor Szydlowski

Date: December 3, 2010

To: Wim Bens  
Dutch Institute for Advanced Logistics – Dinalog  
Prinsenhageaan 19  
4812 DA Breda - The Netherlands

Dear Mr. Bens,

We, hereby express our interest on behalf of the consortium of the TransBaltic project in the So-Cool@EU project which is proposed by your organization within the 7th European research and technological development framework programme

TransBaltic – Towards an integrated transport system in the Baltic Sea Region – is a transnational project and it has been granted a strategic status by the authorities of the EU Baltic Sea Region Programme 2007-2013. In that way the decision makers acknowledged the role of TransBaltic in fostering the sustainable development of the Baltic Sea Region, the project's wide geographical coverage, deep focus on implementation and the strong political backup at the national level. The overall objective of this project is to provide regional level incentives for the creation of a comprehensive multimodal transport system in the BSR by means of joint transport development measures and jointly implemented business concepts. The project wishes to address this key challenge by complementing actions taken by the national authorities within the framework of the EU Baltic Sea Strategy. The envisaged action plan will contain measures, which will address internal connectivity, interoperability and intermodality constraints of the Baltic Sea Region from the sustainable regional development perspective. The plan will also feature regional preparedness measures for the increasing intercontinental transport flows to unlock investments serving better external accessibility of the Region.

Therefore, should the proposal be successful, we would like to receive regular information about "So-Cool@EU" results and events. We would also consider the possibility to involve our members in the project as external parties, e.g. through forums or discussion groups.

Yours sincerely,



Mr. Wiktor Szydlowski  
Coordinator of TransBaltic Project

1



Oresund Region, Denmark  
and Sweden December 2016



## Joint Letter of Intent from the triple-helix actors in the Oresund logistics cluster in the Oresund Region to So-Cool@EU project

*This letter of intent expresses triple-helix commitment for the So-Cool@EU project from the stakeholders in the Oresund logistics cluster.*

*The collaborating partners from the Oresund Region support the So-Cool@EU project and would like to actively participate in the development of a Joint Action Plan which improves competitiveness and economic development within sustainable logistics in the cluster. The ambition is to foster a strategy based on best practice in cooperation with the other regions participating in the project consortium.*

*The collaborating partners furthermore wish to work towards establishing a European platform of excellence for research driven clusters within sustainable transport. This platform can help to boost the innovation capacity in the Oresund Region through measures such as increased education, technology development, research and entrepreneurship.*

*This Letter of Intent includes the following stakeholders:*

*Region of Skåne*

*Region of Zealand*

*Capital Region of Denmark*

*Chamber of Commerce and Industry of Southern Sweden*

*Confederation of Danish Industry – Transport*

*NGU – Next Generation Innovative Logistics (Halm University)*

*Copenhagen Business School*

*Roskilde University*

*Technical University of Denmark*

www.socool.eu



**Joint Letter of Intent from the triple-helix actors in the  
Øresund logistics cluster to So-Cool@EU project and  
Øresund Logistics**

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*Region of Skåne*

*Monika Yngvesson, Director of Regional Development*

Signature

*2010-12-07*

Date

**Joint Letter of Intent from the triple-helix actors in the  
Øresund logistics cluster to So-Cool@EU project**

---

*Region of Zealand*

*Tonni Kragh, Head of Regional Development*

Signature

*9/12 2010*

Date

**Joint Letter of Intent from the triple-helix actors in the  
Øresund logistics cluster to So-Cool@EU project**

---

*Capital Region of Denmark*

*Joost Nielsen, Director for Regional Development*

Signature

*9 december 2010*

Date

**Joint Letter of Intent from the triple-helix actors in the  
Øresund logistics cluster to So-Cool@EU project and  
Øresund Logistics**

---

*Chamber of Commerce and Industry of Southern Sweden*

*Henrik Andersson, Chief Analyst*

Signature

*2010-12-07*

Date



**Joint Letter of Intent from the triple-helix actors in the  
Øresund logistics cluster to So-Cool@EU project and  
Øresund Logistics**

---

*Confederation of Danish Industry – Transport*

*Michael Svane, CEO DI Transport*

Signature

Date: 7. December 2010

**Joint Letter of Intent from the triple-helix actors in the  
Øresund logistics cluster to So-Cool@EU project and  
Øresund Logistics**

---

*Lund University- NGIL- Next Generation Innovative Logistics*

*Mats Johansson Managing Director NGIL*

Signature

2010-12-06  
Date

**Joint Letter of Intent from the triple-helix actors in the  
Øresund logistics cluster to So-Cool@EU project and  
Øresund Logistics**

---

*Copenhagen Business School - Department of Operations Management*

*Prof. Britta Gammelgaard*

Signature

8. 12. 2010  
Date

**Joint Letter of Intent from the triple-helix actors in the  
Øresund logistics cluster to So-Cool@EU project and  
Øresund Logistics**

---

*Roskilde University – Dept. of Environmental, Social and Spatial Change*

*Per Højrup, Director of Environmental Studies*

Signature

6-12-2010  
Date



**Joint Letter of Intent from the triple-helix actors in the  
Øresund logistics cluster to So-Cool@EU project and  
Øresund Logistics**

---

*Technical University of Denmark – Department of Transport  
Prof. Steen Lelund*

Steen Lelund December 7, 2010  
Signature Date



## EXPRESSION OF INTEREST

### Sustainable Organisation between Clusters Of Optimised Logistics @ Europe "So-CooL@EU"

From: Unioncamere Piemonte  
Via Cavour, 17  
10123 Torino - Italy

Date: December 2, 2010

To: José Luis Carreras Lario  
Agrupación Logística de Innovadora, ALIA  
Paseo Isabel La Católica nº2  
50009 Zaragoza (Spain)

Dear Mr. Carreras Lario,

We, hereby express our interest on behalf of the Unioncamere Piemonte in the So-CooL@EU project which is proposed by your organization within the 7<sup>th</sup> European research and technological development framework programme.

Unioncamere Piemonte promotes and supports the institutional activities of the Associated Chambers (the Union of Chambers of Commerce of Piedmont), that includes the eight Chambers of Commerce of the region. It coordinates the activities of these, their own centres and their special companies. It is also the hub of an increasing network - there are 102 Italian Chambers of Commerce associated with the Union of National Chambers of Commerce, their centres and special companies, Eurochambers and the 62 Chambers of Commerce abroad, represented by Assocamere. They are the institutional voices of a system of approximately 400,000 enterprises, including over one and a half million employees.

Furthermore, it is a Contact Point of the Enterprise Europe Network that is a key instrument in the EU's strategy to boost growth and jobs and that brings together more than 580 business support organisations from 47 countries. Their member organisations include chambers of commerce and industry, technology centres, research institutes and development agencies. As members of the Enterprise Europe Network they are linked up through powerful databases, sharing their knowledge and sourcing technologies and business partners across all Network countries. Also, they are closely linked with the European Commission, which enables them to keep abreast of EU policies and to feed small companies' views on them back to Brussels.

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UNIONE CAMERE COMMERCIO INDUSTRIA ARTIGIANATO AGRICOLTURA DEL PIEMONTE  
Via Cavour 17 – 10123 Torino – Tel. 011 5669201 Fax 011 5119144 – [www.pie.camcom.it](http://www.pie.camcom.it) - C.F. 80091380016  
Ufficio di Bruxelles: Rue du Trône 62 – 1050 Bruxelles – Tel. 0032 2 550.02.50

### Annex 3. Letter of Commitment – Dept. of Economy, Government of Aragon



Minister of the Department of Economy, Inland Revenue and Employment  
Government of Aragon



03 DIC. 2010

Mr. José Luis Carreras Larín  
President  
Asociación Logística Innovadora de Aragón (ALIA)

ENTRADA N.º  
SALIDA N.º 1102

Zaragoza, December 3, 2010

Dear President,

The Logistics sector is unanimously considered in Aragón as a key element for the economic development of our region. Therefore, the Government of Aragón puts in an important effort to promote this sector by supporting the investment in infrastructures, the development of research and educational centres in logistics, and the logistics activity of the companies that operate in Aragón.

We consider that the Association of Innovative Logistics of Aragón (ALIA) constitutes a solid support for the regional strategy, both public and private, for promoting the competitiveness, the innovation and the internalization of the logistics sector. We also believe that the participation of ALIA in the proposal for the Regions of Knowledge Project for the call of the year 2011, named "So-Cool@EU", is a great opportunity.

From the Department of Economy, Inland Revenue and Employment, as the transversal responsible for the promotion of the economic development of the region, we consider that this project will provide us with a marvellous opportunity to align our regional strategy with the social, economic and environmental objectives that the European Union wishes to achieve. We will therefore integrate the results of the mentioned project when we elaborate the proposals for the economic policies of the sector.

Best regards,



Alberto Larraz Vilela  
Minister of the Department of Economy, Inland Revenue and Employment  
Government of Aragón