



ANNUAL REPORT 2016

The European Freight and Logistics Leaders' Forum



CONTENT-BASED, SHIPPER-LED INTERNATIONAL FORUM FOR BUSINESS LEADERS

A strong and well-connected community delivering value into the future, F&L is a non-profit international Forum which brings manufacturers and supply chain professionals together to share knowledge and learn. Members across Council of Europe 47 bring expertise across a range of industries to debate issues with supply chain specialists. F&L's focus is to connect people, encourage communication and support collaborations.



F&L PRESIDENT THEO ZWIJGERS

Dear F&L members,

F&L continued to make significant strides forward in 2016. Our membership increased. We had 2 excellent conferences; June in Vienna, hosted by LKW Walter and supported by CHEP, with some great discussions and debates on climate change, artificial intelligence, and the potential impacts on our respective businesses.

Then followed Baveno in November, supported by Hannibal/Conship, Zunarelli, Fercam, BLS Cargo and Arcese. This second conference focused on crossing the alps, looking at the competitiveness of the different modes of transport and points of entry of imported goods into Europe. And not to forget Gavin's excellent interview with Romano Prodi with member Andrea Giardini. We can look back on this year as a highly successful year for F&L. Of course our success in F&L comes from its members, the active participation at our conferences and debates for which my sincere thanks.

For 2017 we will be in Glasgow 18-19 May followed later in the year with a second conference in Belgium 9-10 November. I hope we can also in 2017 count on your presence and contribution.

For most of us, 2016 should have been a decent business year with some improvements over 2015. The two big surprises were the referendum outcome in the UK, so-called Brexit, and the new President-Elect USA, Donald Trump. And we will have in 2017 elections in a number of countries in Europe, which could lead to some more surprising outcomes. Doesn't seem we will get bored with too much of the same.

As most of you have seen in the separate announcement, I will be moving on, relocating early February 2017 to the Sultanate of Oman. This will make it impossible for me to continue my present role in F&L but we will stay in touch. In the meantime, wish you all the best, keep F&L strong.

Theo Zwiigers



Debate + Connect + Accelerate

All industries | All modes | Non-lobby | International (Council of Europe 47) | Forum for Business Leaders | Non-profit



“Members, friends,

“F&L is an exception in a world of uncertainty; we know where we are at and have a clear vision for the future. Our unique formula, think tank, non-lobby, non-profit, Council of Europe base, relationships and links to global Institutions and leaders of the European Commission, all make the Forum what it is. A network unparalleled in Europe, Chatham House rules drive free discussion in our debates and most importantly we are independent of any other body with two conferences per year across the whole of the European geography. Our goal for 2017 is to expand the F&L dynamic into Central and Eastern Europe”.

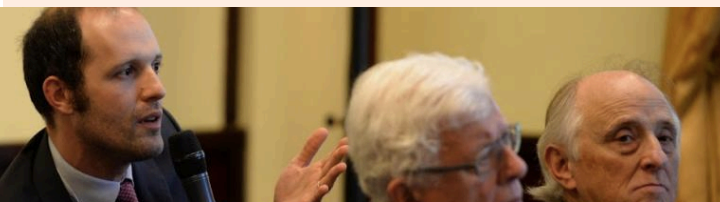
2016 had its challenges but highlights for me were meeting people from different sectors and countries especially in the light of the Brexit vote. Europe working together has been one of the achievements of my generation and whatever emerges from negotiations I hope we can maintain the principles of co-operation and collaboration at all levels. Geography and common interests of security, wealth creation and high standards of public services, after all, unite us.

For logistics, Europe must act as one for transport systems, environment, climate change and to roll out new technology. We must maximise our common potential, capacity and reach of multimodal transport regardless of political borders and we must strive to remove barriers from outdated enterprises who try to hold on to what they have without looking at what we need to achieve. The European Union Agency for Railways is an excellent example of the need to integrate railway systems and networks across Europe; Ralf-Charley Schultze and I serve on the Management Board.

As we approach 2017 significant changes will occur for F&L. We will enter what I call the 4th era. *An era is defined "a span of time marked by character, events, and changes on earth".*

F&L Era One: Very much led by our founder in 1994, Franco Castagnetti, an enthusiast for work, never gives up and very persuasive with institutions to see his point of view. These were excellent credentials to establish F&L, the aim being to create a forum where logistics leaders from manufacturing and transport supply across Europe could meet to review and embrace best practice. Founder member countries Austria, Belgium, Finland, France, Great Britain, Germany, Hungary, Ireland, Italy, Netherlands, Poland, Portugal, Spain, Sweden and Switzerland. Some of our founding Fathers included Horst Kubek, Antti Vehviläinen, Ivan Fuller, Wibo Aris, Emilio Fernández, Rune Svensson, Armand Toubol, Bertil Hastéus, Wout Pronk and then Johannes Fritzen came soon after. Franco passed the presidential baton to Wout Pronk and Wibo Aris for Dublin/Amsterdam 2004.

F&L Era Two: Emilio Fernández became President prior to the Glasgow conference in May 2005. Emilio is a gentleman, calm at all times but with a razor type focus on bringing rail freight into the modern world. In Spain he knows everyone. Johannes Fritzen took over at the Marseille meeting in Nov 2008, certainly a dry sense of humour (he must have had one to appoint me) and a steely determination to get things done. Marseille was hosted by Armand Toubol. This is also the year when our redoubtable Treasurer Harald Bortolotti from Austria joined the Board. Harald has been a consistent strength to F&L, giving Audrey and I consistent challenges but strong support. The Fernández-Fritzen era brought even stronger links with the rail and automotive sectors and with the EU Commission, and our conferences took us to UK, Austria, Hungary, Spain, Finland, Portugal, Poland, France, Germany, Belgium, Italy and Switzerland. No wonder F&L is unique, given this exposure to markets and country priorities in infrastructure and freight service provision.





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CONTINUED - F&L Era 2

It was during the Fritzen Presidency that Audrey and I were brought on board. We planned the November 2010 meeting in Antwerp in short order and Antti Vehviläinen as senior VP of F&L was 'Godfather' for the meeting to ensure that Audrey and I did not break any F&L rules. A very clever fellow, which is probably why he is now running the Finnish Transport Agency. This began a chapter which has resulted in the most stimulating and exciting appointment of my career. Audrey, now the conscience and spirit of F&L, has a major impact on building and strengthening vital close links with members and insists on nothing less than excellent in everything that we do.



F&L ERA 3: Brought us Frank Arendt of Procter and Gamble as President following the Lucerne meeting in May 2012. Frank represented a new generation of thinkers, a dynamic influence in the modern world of logistics and the supply chain. At the London meeting he showed his commitment for the environment by riding a Boris bike into the venue, and it was during this era that we forged links with OECD (International Transport Forum) and established a working group and subsequent paper on Efficient and Sustainable Supply Chains which was presented by his successor President Zwijgers at the annual ITF Leipzig event in May 2014. Frank gave F&L the shipper-led focus that we still have today and was very persuasive in getting new shipper members on board.



Theo took over in Rotterdam November 2013, a thinker, and a clear vision of how the world worked - specifically in the context of the supply chain. Content in F&L agendas was his key demand.



I had the privilege of serving F&L as Press Officer at the end of the first era and into the second, and as Secretary General in eras 2 and 3. I owe specific thanks to Lord Tony Berkeley who introduced me to my first F&L conference in Gothenburg in May 2001 - Tony had me on his UK Railfreight Group Board, saw me as an energetic trouble maker and suggested 'F&L would be good for you'. I also thank Wibo Aris who was at that time Chairman of the working groups. He asked if I would chair a group on the 'location of intermodal terminals 2015', I called the group "Project Pendolino" and never looked back. Losing Jörg Sanders of Krone has been my low point - Jörg was an amazing man, boundless energy, exceptionally well connected globally and one of the people who really made an impact. We must rejoice that we had Jörg for the time we did - he added something to everyone he met and knew.





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So now to ERA 4.....



Theo has accepted a major role in the Sultanate of Oman. He will use his extensive global logistics experience in a new part of the world and therefore departs as President, thank you Theo. John Riley of CHEP (Brambles Group) now takes the reins as our new President; John is a walking dynamo with a passion for technology and new ideas - an ideal person to guide our Forum to new horizons.

We are looking for a successor for me - someone with industry credibility, an excellent sense of humour, someone who is motivated by new challenges, who wants to travel to meet members current and future in their own backyards, and someone who will refuse to accept F&L delivering anything but the best to its members.



I will take on a new challenge as your 'Ambassador at Large'. This gives me more time for my video interviews with the great and the good (we now have an F&L youtube channel so you can watch at your leisure - did you know?). I am already working on getting an interview with the World Economic Forum supply chain experts as well as with some African contacts and several other interesting links.

I will continue to cause trouble at F&L meetings, to learn and pass my learning on to you, and I will keep promoting collaboration and working together for common gain. Please note Audrey's role, involvement and commitment will not change in any way; indeed, she is looking forward to broadening our F&L team. I plan to lay down a few challenges for my successor, which will either be approved prior to publication by the President or changed and highlighted in red. Thank you all for your support and encouragement.



Challenges to New Secretary General in Era 4:

- Expand membership in CEE, Norway and Baltic countries. Utilise support of members in these areas.
- Maintain strong links with the TEN-T coordinators in Brussels; we have had 4 of 9 attend our meetings.
- Re-visit links with Utikad in Istanbul.
- Maintain links we have built with global institutions. ITF, European Investment Bank, OPEC, the Commission and - when politics allows - resurrect our annual breakfast meeting with the Transport Committee of the European Parliament. I would also maintain links with the Chinese Silk Route representatives, London Shipping Week, Munich and even further afield. Targets might include IMF, the World Bank, NATO (freight aspects) and the International Energy Agency in Paris.
- We steer clear of other associations in Brussels who wish to invade our borders.
- Maintain links with academia; Gordon Wilmsmeier (Kühne) and Rolf (OnCampus) will assist.
- Maintain and develop intern policy; this preserves our links with future generation.
- Consider how the working groups relate to the work of the Think Tank.