

Today's transport sector is facing changing consumer demands and a dramatically shifting global marketplace. Companies need to recognize opportunities while defusing challenges.

FleishmanHillard can help strike the right balance.



3.3 million are employed by the EU's shipping fleet (the world's largest).

By 2030, more people will work in EU aviation than live in Latvia.



5% of the EU workforce works in transport

2012 saw a 10% growth in the EU cruise market



The EU has 100,000km of coastline.

1.5 million more cars are made in Germany & Spain than in the US & Canada



31% of EU-27 energy consumption is attributed to transport

13% of EU household consumption is spent on transport.



**1,107 m passengers London underground per year**

### The UK

Heathrow handled 70 million passengers in 2011.

1,107 m passengers use the London underground each year. Dover handles some 13 m passengers and 2 m road haulage vehicles each year.

The UK has almost 400,000 km of road.

**400,000 km of road**



## BRUSSELS PRIORITIES

- The transport market liberalization agenda - with road, port and rail lagging behind.
- Ambitious (too much so?) environmental protection goals
- Passenger rights as a flagship.
- Keeping competitive in a changing global landscape
- A changing of the guard in 2014.

### The NETHERLANDS

Logistics named a top priority sector for the Dutch economy.

Hosts 57% of distribution for American & Asian companies. Rotterdam is Europe's biggest port and Schiphol is Europe's 3rd largest airport.

**Logistics #1 Priority**

### POLAND

Per person, Poles spend +/- €500 per year on transport (EU average is €1800).

3,997 km of navigable rivers and canals.

412,264 km of public roads, of which 131,863 km are unsurfaced. 254,000 employees in road freight vs 149,000 in road passenger transport.

**412,264 km of road**



### GERMANY

Trans-European hub with nine bordering countries.

Most advanced and diverse infrastructure worldwide.

Every seventh university graduate in Germany begins a career in the German automotive industry.



**2011 goods traffic: 6.5 %**

**4.36 tonnes**



### SPAIN

The Spanish AVE system is the longest high speed rail network in Europe with 2,665 km and the second in the world, after China. - 10th in the world.

There are 1,045 km of waterways, but they have minor economic importance.



**2,665 km of high speed rail**

**681,298 km of road**



### ITALY

46.1 million tourists visit Italy each year, spending €1.47m in 2012.

4 million motorists drive on 3,408km of road. Air traffic increasing for passenger and freight.

Container traffic has decreased in all three southern ports.

**46.1 m tourists/year**

**€1.47m**



## Case Studies

### PRO-RAIL

ProRail, the national Dutch railway infrastructure manager, facing strong public scrutiny, called on FH for reputation management support. FleishmanHillard helped them develop a new corporate messaging platform and launched a campaign to promote positive stories in the difficult winter months. The result has been a positive shift in news coverage to one of ProRail's innovation.

### COSTA CONCORDIA

Following a period of intense scrutiny on the global cruise line sector following a major incident, FleishmanHillard worked with a cruise line company to promote global safety messages through a Passenger Ship Safety Conference.

### GM

FleishmanHillard was called upon to support the successful restructuring of European operations, helping to communicate the need for this restructuring, manage internal reaction, minimize negative coverage & government interference and build positive momentum to re-build the brand moving forward.

### EMIRATES

Since mid-2009, FleishmanHillard has been engaged as the Brussels public affairs agency of choice for Emirates Airline with the specific brief to act as the "eyes and ears" for the company in Brussels. FH Brussels currently advises on a number of critical policy areas for Emirates including environmental policy, competition policy, airline insolvency and consumer protection policy.

# The FH Approach

- a conversation we have with our clients

| What is your goal for the year? | DEFEND                                 | MAINTAIN  | GROW  |
|---------------------------------|--|---|---|
| Product                         | I need to defend my product            | I need to maintain my license to operate        | I need to introduce a new product on the market |
| Organisation or Country         | I need to defend my reputation         | I need to communicate and align internally      | I need to raise my profile                      |
| Marketplace                     | I need to defend my commercial freedom | I need to shape a business-friendly environment | I need to access new markets                    |

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### Global Manufacturing & Industrials Practice

Headed out of multinational Brussels office.  
 Encompassing 12 industrial segments ranging from transport to chemicals, from aerospace to automotive.  
 Broad client service offering, including public affairs, crisis management, restructuring and B-to-B.

## Our Brussels clients past and present:



# Transport Practice

FH Manufacturing & Industrials Team



The transport sector should in many ways see itself as the enabler of the European Single Market.

-the catalyst to a further deepening of trade and economic ties between EU members and beyond.