

Barcelona Treball

Land transport

Sector Report 2013

With the collaboration of:
Associació de Prevenció d'Accidents de Trànsit

Co-financed by:

The 10 keys to understanding the sector

Growing commuting needs, globalisation of trade, environmental awareness and the increasing cost of fossil fuels create a scenario for change as well as good prospects for the land transport sector.

The sector

Land transport encompasses long-distance, urban and international carriage of goods and people by rail and road.

Main areas of activity

The land transport sector includes rail and road transport of people and road and rail freight.

Trends

In terms of the movement of people, public transport will be boosted mainly due to technological and infrastructure improvements that are being introduced combined with its critical role in sustainable mobility. As for freight, globalisation of trade and the implementation of efficient inventory management systems are crucial to the evolution of the sector in the near future.

Economic importance

The land transport sector, according to the Annual Survey of Services INE, had in 2010 a turnover of €45.593 million, representing 11,3% of the turnover of the whole services sector in Spain.

In Catalonia, the land transport sector has a considerable economic weight, and it is one of its the most important productive sectors; in fact, business volume is €9.954 million, representing 21,8 % of the turnover of the sector in Spain and 43,8% of the turnover of the transport industry (land, maritime, air, postal activities and storage) in Catalonia.

Regarding the volume of tons of freight moved by land transport in Catalonia by area of activity, rail transport increases its prominence between 2010 and 2011 (22% increase in the volume of tonnes moved), while road transport down 7% between these two years. Thus, regarding road transport, between 2007 and 2011, the volume of goods moved (internal in Catalonia and the rest of Spain) has dropped 40%.

The Metropolitan Transportation Authority estimated at 472 million the number of trips made in the area of Barcelona in the first half of 2012 (1,9% lower than in 2011), most of which by rail system (64,1%). The reuptake made by ATM integrated system was €361 million in the first half of 2012; Barcelona Metro is generating more revenue (34% of the total).

Employment

The current economic situation is affecting the use of land transport sector in a negative way, and between the third quarter of 2008 and third quarter of 2012 employment has fallen by 100.800 people, representing 16,2 %.

Land transportation in Spain (according to 2012) is the most important between the different kind of transport industries (land, maritime and air), because employs 1 in 9 workers in the transport industry as a whole.

Regarding Catalonia, according to the latest data available from 2010, the land transport sector employed 110.171 persons (73.311 employees and 36.860 self-employed), which represents around 96% of people working in transport sector in Catalonia and 19,6% of employment in the land transport sector in Spain (2010 data).

Professional profiles most in demand

Apart from some highly qualified technical profiles, especially in railways, the land transport sector mainly requires people with mechanical and automotive training and special driving licences.

Occupations most in demand

There is significant demand in the rail sector for highly qualified people with engineering training, for instance railway signalling engineers, and people with basic and vocational training, for example rail vehicle drivers. Passenger transport will continue to generate jobs if companies and government remain committed to sustainable mobility, which will include bus drivers for example.

Future scenarios

Catalan and metropolitan transport and mobility plans, as Transport Infrastructure Plan of Catalonia 2006-2026, secure the groundwork in the medium term for the development of road and rail networks and therefore the conditions for improving public carriage of people and goods.

Weaknesses

The development of the passenger land transport sector is extremely dependent on continued public investment in building and maintaining road and rail networks, while freight transport is highly subject to fluctuations in the global economy, something which is very relevant in a context of crisis.

Opportunities

The future development of the Mediterranean Corridor, recent investments in improving railway transport (high-speed train, commuter trains, etc.) and the extension of efficient inventory management systems will facilitate the setting up of new logistics parks and the establishment of new businesses and activities in Barcelona and Catalonia.

01 Introduction to the sector

The land transport sector has always played a strategic role in the economic and social development of states and nations and land transport of people and goods is an absolutely essential activity in developed and diversified societies with a wide division of labour.

However, the various types of land transport have different degrees of importance and technical, economic and social specificity.

The land transport sector consists of three main areas of activity: passenger transport by rail (in trains, metros, trams, etc.), passenger transport by road (urban and intercity buses, etc.) and the carriage of goods by road or rail. In addition, this sector also includes other transport-related activities such as removals services, warehousing and storage and other ancillary activities.

Furthermore, the residential model implemented over recent years throughout the Barcelona metropolitan region has led to increased commuting (mostly from the Barcelona metropolitan region into Barcelona). By contrast, growing environmental awareness in recent times and the rising cost of fossil fuels are making the use of private vehicles for habitual trips increasingly less viable. This means that mass passenger transport is becoming more and more important not only in terms of intra-urban journeys but also for ones between urban areas.

Finally, increased international trade in products and improvements in logistics system have transformed and boosted the carriage of goods.

02

Main areas of activity

Rail passenger transport

The Spanish and Catalan territorial model is characterised by a concentration of population in major metropolitan areas. In addition, many of the people living in less populated areas have to commute to these areas to work. Consequently a powerful rail infrastructure network is required that can absorb the volume of people who need to commute on a daily basis. The main purpose of rail passenger transport is carrying people from one place to another along a system of railways. Furthermore, rail travel is not restricted to urban or intercity journeys but also includes trips abroad.

This business area thus encompasses rail infrastructure development, train maintenance and the provision of rail services which may be short, medium or long distance.

Road passenger transport

Just like rail transport, the purpose of road passenger transport is to take people from one place to another, mainly to work and back, in wheeled vehicles on asphalt or dirt roads.

Unlike its rail counterpart, however, road passenger transport can be divided into two main groups: private and public transport. The former is limited to use by their owner while the latter can be used by anyone if they pay the fare. This report will mainly examine public road passenger transport in economic and employment terms.

This business area thus encompasses road infrastructure development, road maintenance and the provision of transport services using buses, coaches and taxis which may be short, medium or long distance.

Carriage of goods

Carriage of goods includes those activities purely related to the movement of goods (foodstuffs, domestic electrical appliances, cars, fuel, etc.) from different logistics or business points in Spain or between different countries either by road or rail. The transport of goods by road has greater economic and employment importance than the transport of goods by rail, although the two types are complementary; for instance in the carriage of a product from one continent to another it is highly likely to have to use a number of means of transport which might include trains, trucks, etc.

Powerful, open and competitive freight services, whether by road or rail, may well be a key factor in turning Spain and Catalonia into something more than just a tourist destination and thus increasing the strategic options of economic development by boosting exports and becoming an international logistics hub.

03

Sector trends

The progressive improvement of road and rail infrastructure, coordination of public transport services, globalisation of the carriage of goods and implementation of efficient inventory management are some of the keys to success for the development of the sector.

Coordination of rail and bus services and setting up an integrated public transport system in Catalonia

Increasing the efficiency of the public transport system involves boosting complementarity and coordination between different means of transport. The Catalan Passenger Transport Plan 2008-2012 is based on viewing the country as a network and therefore one of the main scenarios for the future is full coordination between buses and trains that will encourage multimodal travel and enhance people's quality of life.

Hence the Catalan Passenger Transport Plan 2008-2012 seeks to drive complementarity and coordination of bus and train services and urban and interurban transport services. To this end it proposes to reduce maximum waiting time between bus and rail to 10 minutes, set a maximum distance of 300 metres between bus stop and train station and promote the implementation of interchanges. The Plan also provides for establishing agreements between the various urban and interurban transport stakeholders to streamline resources and improve efficiency.

Moreover, the new orthogonal bus network model is gradually replacing the current radial model with another, more decentralised one that fosters intermodal transport and coordination. This model was first introduced in Barcelona in 2011 and completed in October 2012. The orthogonal model consists of five new bus routes connecting the city in a straight line with an orthogonal.

Infrastructure development and mobility improvement

The main actions in budgets for 2011 to develop transport infrastructure and improve mobility in Catalonia include:

- Budget allocation to the Metropolitan Transport Authority to improve public transport in Barcelona, Lleida, the Camp de Tarragona and Girona.
- Investment in work on the Barcelona Metro Line 9.
- Extension of the Government of Catalonia Railway (FGC) to Terrassa in the Terrassa-Rambla/Can Roca tunnel section and building of interchange stations between RENFE national railway stations and Rambla/Can Roca.
- Road maintenance work.
- Investment in logistics hubs.
- Work on a bus/carpool lane on the C-58 motorway.
- Funding to local authorities and private companies to improve transport lines and renew rolling stock.
- Increase power on Barcelona Metro Line 5 so as to bring new trains into service.
- Improved accessibility and remodelling of the FGC Gràcia station.

These actions are designed to develop an integrated infrastructure network, equip Catalonia with an adequate road and rail network to ensure accessibility throughout the country and promote integrated public passenger transport. Investment will come to €2.2 billion.

Improved commercial speed of public transport

Encouraging the use of public transport at the expense of private transport involves raising awareness about the importance of sustainable mobility. However, awareness is not enough if service quality is not tailored to the needs of people who have to use it. It is essential to increase the commercial speed of mass transport to make it attractive to users and competitive with private transport.

State-of-the-art means of transport and technologically advanced infrastructure are needed to achieve this increase in speed, while existing services also have to be ramped up with express or semi-fast routes and by increasing the number of connections. In both scenarios considerable capital and human resources will have to be invested.

Besides extending the high-speed train from Barcelona to France, there are also plans to implement new express bus services with no intermediate stops involving nineteen new non-stop connections between major cities in Catalonia, improvements to existing connections, eight new semi-fast connections between important population centres (such as Manresa, Sabadell and Terrassa) and the upgrading of four services to express ones.

Reduction of transport externalities

Mass transit systems (buses, trains, etc.) save on energy use per person and reduce greenhouse gas emissions. For example, carbon dioxide emissions per passenger on a bus or train are one third of those emitted by a car. This ratio decreases even more when it comes to other harmful gases like carbon monoxide or nitrates: in these cases, public transport does not reach even 10% per passenger of the pollution from a car. In aggregate terms, external costs of transport in Europe account for 7.3% of total EU GDP, a figure that in the case of Spain rises to 9.8%. 83.7% of this cost comes from vehicular traffic, with two thirds resulting from passenger transport and one third from freight.

Thus it is essential to encourage public transport use in order to minimise energy consumption, increase use of renewable and clean energy, achieve legal air quality standards and reduce greenhouse gas emissions. Improving public transport should help to increase the number of its users compared to private vehicles while at the same time reducing energy use, emission of particulate pollution, road congestion and accidents.

Thus in 2010 public transport operator Barcelona Metropolitan Transport (TMB) bought four new hybrid buses that combine electric and diesel engines, a technology that reduces fuel consumption and pollutant emissions by up to 30% and noise pollution by up to 50%. Hybrid buses are also used elsewhere, for instance in el Baix Llobregat where eight of them have been brought into service.

Improvement in information systems for public transport users

Improving service quality involves more than just increasing the speed and frequency of public transport since the public also need to know about timetables, frequency, information about incidents, information updates, etc.

Implementing a first-class information service involves having in place a system for maintaining timetable information in all stations and an efficient system for updating information over the Internet. It also means renewing the routes tool on transport website www.mobilitat.net, publishing new transport guides and improving the provision of information using remote media that must be accessible before and during the trip (website, panels in stations, mobile applications, etc.).

Improving information systems has resulted in a range of specialist IT posts being created in the industry in addition to more traditional jobs such as in engineering and road and rail maintenance. The TMB has already developed several mobile applications so passengers can find out about maps, waiting times and efficient routes among other information useful for getting around town. Thus public transport needs to enhance communication channels and deploy new applications so that information is available 24 hours a day, seven days a week.

Globalisation and offshoring of trade in goods

An increasingly important part of the products that are consumed on a regular basis come from all over the world, which means that road and rail freight is a particularly active business. Consequently logistics services for the carriage of goods have to address this global scenario: international transport costs can make products or materials from emerging countries and commodity producers in different areas around the world competitive. Similarly, Catalan products can reach any market in the world and compete with local products.

According to the Spanish Confederation of Business Organisations' *Memorandum: the transport sector in Spain*, a study is needed to describe amongst other things all the players involved in the transport sector, the type of companies that make it up, their size, main customer activity sectors, the functions of these companies and the level of brokering required to improve sector efficiency and productivity. More immediately the *Memorandum* suggests policies to encourage the acquisition or renewal of fleets with greener vehicles, the introduction of new technologies and levelling company payroll taxes down to the EU average, as they are much higher in Spain.

Flexibility and speed of business procurement systems

Over many years companies have met changing market requirements flexibly and promptly, which means inventories in warehouses have been cut down to essential technical minimums. Hence the constant supply of products that had previously been stored calls for flexible and efficient freight services.

The Mediterranean Corridor

The Mediterranean Corridor means the high-speed train lines that are to connect Algeciras with France via cities such as Murcia, Valencia and Barcelona. The corridor is planned as a high-performance line delivering competitive carriage of people and freight.

Although the Corridor has yet to be developed, its implementation is backed by a number of national and regional voices calling on the European Commission to include the Mediterranean Corridor as one of the priority routes in the TEN-T Core Network and view it as a strategic factor for connections and internal territorial cohesion in the European Union.

The execution of the works on the Mediterranean Corridor would be a source of economic growth and employment in the areas which it goes through, which are home to 40% of the Spanish population and account for 40% of Spanish GDP. This growth would take place both in land transport and also in all economic sectors, since the provision of a direct line to connect Africa with Europe would be an incentive for companies to set up in the area.

04

The sector in figures

Economic data

- According to the Market Observatory of road freight transport¹, march 2012, prepared by the Ministry of Development, the transport sector as a whole (land, maritime and sea) represented, in 2008, 4,1% of the national Gross Value Added (GVA). The main contribution of this sector is made by land transport (road and rail) with 57,6%.
- According to the Annual Survey of Services 2010 (latest data available), prepared by INE, the turnover of the sector is €45.593 million, representing 11,3% of total business service sector in Spain. In concrete, 5.1% corresponds to the volume of business generated by transport companies intercity passenger and freight rail, 19,8% to other companies in land transport of passengers by road and 75,1% to companies transporting goods by road, moving services and pipeline transport.
- In Catalonia, according to the latest data from the Annual Survey of Services 2010, the turnover of land transport sector companies is €9.954 million, representing a 21,8% of the transport turnover in Spain and 43.8% in Catalonia.
- The operator RENFE moved, in 2011, 17 million tonnes of cargo, representing a 7,9% increase over 2010, but still far away from the 22 million tons moved in 2008.
- The latest data available for transport of goods by road (INE) indicates a clear negative trend. Thus, in 2010, Spain moved by road 1.135 million tonnes, representing 7,3% less than in 2009 and 23% less than in 2008. Tons moved to Catalonia, according to the same source, in 2010 were approximately 20% of Spain's total.
- In Catalonia, according to the Observatory of Catalonia Logistics², the volume of freight moved by road has dropped by 7,7% between 2010 and 2011. Specifically, the internal volume in Catalonia fell by 9% and the exchange with Spain by 5%, while international road transport increased by 22%. If it is considered the 2007-2011 period, the reduction of freight internal transport operations by road in Catalonia and the exchange with Spain fell by 40%. This fact is explained mainly by the collapse of the construction, which accounted for 50% of transactions in 2007.
- The number of tons moved by rail transport in Catalonia between 2010 and 2011, according to the Observatory of Catalonia Logistics had increased by 22%. The increase was widespread, and the internal flows in Catalonia increased by 11% between 2010 and 2011, trade with Spain by 30% and international trade by 21%. It is necessary to emphasize the role played by the Port of Barcelona, because the rail transport of containers has increased by 146% between 2010 and 2011.
- RENFE, according to the Ministry of Development, in 2011, moved 468 million passengers, representing a 3,1% increase over 2010. It should be noted that 2006 was the year in which the number of passengers was higher: 516 million (9,4% more than in 2011). As for the different kind of rail transport, in 2011, 88% of passengers moved by local trains, 5% by conventional middle-distance trains, 1% by high speed middle-distance trains and 4% by long-distance high speed trains. Traveller provisional data in 2012 (from January to August) are very similar to 2011, maintaining the trend of improvement (but without a significant rise).
- In Spain, according to the Ministry of Development, there are 2.559,5 km of toll motorways (2012).
- The budget for the Metropolitan Transportation Authority of the Barcelona (ATM) for 2012 is €1.098,58 million (3,6% more than in 2011): €502,5 million will be current transfers to other organizations, and €1.162.700 will be real investment in infrastructure.
- In 2012, the ATM integrated fare system consist of 707 transport lines: 7 metropolitan subway lines, 102 line buses, 2 railways from the Government of Catalonia (Barcelona-Vallès and Barcelona-Anoia), 6 local railwals (Renfe), 6 metropolitan tram, 107 ATM buses, 358 buses form ATM General Secretary and 119 buses line corresponding to other urban buses. During the first half of 2012 there were 472,2 million travels in this

¹ These data come from the National Accounts of the National Institute of Statistics (INE).

² Logistics Observatory. Indicators of competitiveness of Catalan logistics system. 7th edition (2012). Department of Territory and Sustainability of the Government of Catalonia, and Logistics Centre of Catalonia (CIMALSA). Produced by the Institut Cerdà.

transport network (1,9% below the same period of 2011³): 64,1% in rail mode (2,1% less demand in comparison to 2011) and 35,9% in bus mode (1,6% less than in 2011). The reuptake of ATM integrated lines integrated during the first half of 2012 was €361,19 million (in 2011 was €681,46 million, therefore, 2012 values are similar to 2011). The Barcelona Subway is generating more revenue than other kinds of transport (€123 million during the first half of 2012), representing 34% of the revenue.

- According to ATM, the traffic light in Barcelona Metropolitan Area has also declined during the first half of 2012: 8,2% in toll roads over the same quarter of 2011, and 3,4% at the entrances of Barcelona.
- The family budget survey of INE states that, in the whole state, the average expenditure per person in rail transport (train, metro, tram) in 2011 was €23,26 (3,3% higher than in 2010) and in road transport was €43,62 (2,2% higher than in 2010).
- As for Catalonia, the family budget survey of INE reports that the average cost per person for transport by rail in 2011 was €28,71 (12,4% more than in 2010) and by road transport €27,32 (15% higher than in 2010)
- The 2012 budget of the Generalitat of Catalonia allocated €441 million to road infrastructure, €1.081 million to rail infrastructure, €1.422 million to support projects in public passenger transport infrastructure and €38 million in passenger road transport infrastructure.

Employment data

- In the third quarter of 2012, the land, air and sea transport sectors provided 3,3% of employment in Spain, of which 90% was in the land transport sector, with around 518.700 people, 1,8% higher than the same quarter of 2010.
- The evolution of employment in Spain in the land transport sector is negative since the beginning of the crisis. Thus, between the third quarter of 2008 and third quarter 2012 employment has fallen by 100.800 people, representing 16,2%.
- In Catalonia, according to the latest data available from the National Survey of Services INE 2010, the land transport sector has 110.171 employed people (73.311 employees and 36.860 self-employed), which represents around 96% of people working in the transport sector in Catalonia and 19,6% of employment in the land transport sector in Spain (2010 data).
- The Central Business Directory of INE reports that in 2012 there are 184.760 companies in land transport (2,3% less than in 2011): 65% are companies freight transport by road and removal services. The trend in recent years is clearly negative, and between 2008 and 2012 have disappeared 26.497 companies, representing 12,7%.
- In Catalonia, according to the Central Business Directory of INE, there are 36.347 land transport companies, 19,6% of companies in the sector in Spain. The evolution in the number of companies from the beginning of the crisis is also negative. Thus, between 2008 and 2012, 5.622 companies have disappeared (13,4% reduction).
- According to the data above, the type of company in the transport sector in Catalonia is microcompany, with an average of 4,3 employees per company.

Sources: Latest data available: INE; Ministry of Development; Renfe; TMB; Idescat; Barcelona Metropolitan Transport (TMB); Government of Catalonia Railways (FGC); Catalan Commuter Railways; Market Observatory of the transport or goods by road, Annual Survey of Services 2010 INE; Observatory of Catalonia Logistics; and Department of Economics and Knowledge. Budget 2012 Government of Catalonia.

³ In 2011, according to ATM, was registered the maximum number of travels in the public transport system in the Barcelona area.

05 Professional profiles most in demand

Most highly qualified professional profiles

Training profile

The most highly qualified professional profiles are mainly to be found in rail and freight transport.

In the case of rail transport, people with engineering training are primarily required. In general, training is needed in telecommunications and industrial engineering which provide specialised instruction in areas such as signalling, remote control, rail infrastructure and rolling stock.

Turning to freight, the highest qualifications are needed in planning. Candidates will preferably have postgraduate qualifications (master's degrees, etc.) in business logistics.

Between two and five years' experience in a similar post is also usually essential.

Skills profile

These professional profiles normally occupy positions of responsibility in which they have to make strategic or specific decisions that directly affect project execution. It is imperative that people should be methodical but also able to put forward solutions to unforeseen problems.

Professional skills most in demand for these profiles are initiative and being proactive, dynamism, teamwork, the capacity to organise their own work and the ability to achieve objectives.

Examples of jobs in the web Barcelona Treball directory

- ✓ [Rail network maintenance engineer](#)
 - ✓ [Rolling stock maintenance engineer](#)
 - ✓ [Traffic manager](#)
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Less qualified professional profiles

Training profile

As in other sectors, in principle there is no minimum training required beyond compulsory formal education (called ESO in Spain). In the rail maintenance and automotive field it is very important to have electrical and automotive vocational training to qualify for many jobs in the sector (electro mechanic, vehicle mechanic, etc.). Furthermore, increased technical expertise in the sector will mean that people seeking employment in it will have to do specialised technical courses in addition to formal basic or vocational training.

Moreover, doing customer care or service courses is advisable for people who want to work in rail or road passenger transport.

Skills profile

The skills required will depend on whether the person concerned is working in passenger or goods transport. In the case of passenger transport, in addition to technical competencies employees will also need customer service skills for posts in which they have to deal with the public. In the case of freight transport, patience is a virtue as road trips are long and are usually performed alone, for example as a truck driver. However, in general it is important to have the ability for and an interest in working in teams and to be dynamic and proactive. Moreover, the nature of the sector's business activities means being able to work at night, at the weekend and on public holidays is a plus.

Examples of jobs in the web Barcelona Treball directory

- ✓ [Railway train driver](#)
 - ✓ [Revenue protection inspector](#)
 - ✓ [Train maintenance operator](#)
-

06

Future scenarios

Weaknesses

- Professionals working in the land transport sector, and especially in road carriage, are usually self-employed which means that they have had to make a major initial capital investment to buy at least their own means of transport (e.g. taxi drivers or truck drivers). This need for initial investment may prevent qualified people from entering the sector.
- Freight transport is subject to fluctuations in the global economy, which is significant in times of crisis as it may lead to lower public and private investment, less use of transport by private users and companies, etc. Thus, specifically, in Catalonia during the period 2007-2011 transport operations to internal road freight exchange with Catalonia and Spain fell by 40%. This fact is explained mainly by the collapse of the construction, which accounted for 50% of transactions in 2007.
- The development of transport critically depends on continued public investment in building and maintaining roads. A slowdown in investment may lead to an economic and employment recession in the sector.
- The poor quality of customer service offered by medium and long-distance public rail transport operators means users are less likely to travel by the service.
- Catalonia has to receive from the Spanish state €3.648 million to invest in local trains. It is a service that in recent years has had many inefficiencies, delays and problems which have generated many complaints from the public. The Generalitat of Catalonia assumed the management of the service in 2010.
- Excessive fragmentation in the sector adversely affects its interests, i.e. there are no business structures in place with sufficient strength and solidity to pass their problems on in product prices. For instance, many carriers cannot transfer fuel price increases to the cost of the service they deliver and consequently have to cut their margins.

Threats

- Inadequate investment in public transport improvements may lead to a sustained increase in the use of private transport which is polluting and unsustainable and will lead to congestion on the roads.
- The decrease in interurban passenger transport is conditioned by the demographic trend of population return in the urban areas which provide most of the jobs on offer. Similarly, the rise in unemployment reduced intercity travel because there is less need for mobility.
- Economic players in the land transport sector do not perceive the training needs of their workers and do not associate training with the continuous improvement of competitiveness and service quality. This failure to approach training as an adjunct to enhance the profitability and competitiveness of the sector becomes a threat; 50% of companies provide very little or no training.
- The sector has low staff turnover and an average age of around 50 for the self-employed and around 45 for salaried employees, which means it has an aging workforce. Combined with insufficient emphasis on training, this can impede the quick and efficient inclusion of new technology in the field.
- The lack of intermodal integration (between different types of transport) may hinder the sector's development and lead to stagnation in the number of people and goods that can be carried.
- Poor service quality (slow speeds, uncompetitive prices, failure to keep to timetables, etc.) may increase the number of people who utilise private rather than public transport.
- Adaptation to a globalised market allows competing multinational transport companies to enter Europe and Spain, which entails the development of more accurate and efficient management techniques.

Strengths

- Transport is a sector of increasing strategic importance, not only because it contributes to improving the competitiveness of the country but also because it supports other productive sectors such as industry, retail and tourism. In this sense, the proliferation of online sales channel generates land freight distribution needs.
- The development of mass passenger transport is now compatible with sustainable mobility, i.e. the current infrastructure network is extensive enough to become an alternative to private transport.
- Catalonia has a powerful industrial and service network that requires large and constantly evolving goods and passenger transport services.
- The technological evolution experienced by the sector has not lead to the destruction or replacement of jobs. In fact, the sector has provided work for a constant volume of people as approximately 4.5% of people working in Spain do so in the land transport sector and this figure has remained stable over the past 30 years.
- The smooth running of freight at the Port of Barcelona has contributed to increase rail containers transport by 146% between 2010 and 2011.
- The proper application of European Union free competition law will help create a framework of equal opportunities and conditions for the development of land transport in all Member States.

Opportunities

- The extension of efficient inventory management systems will mean that the business prospects of logistics centres and freight will remain good in the future.
- Transport and mobility plans for Catalonia and the metropolitan area, as Transport Infrastructure Plan of Catalonia 2006-2026, will ensure the basis for the development of road and rail networks in the medium term and therefore the conditions for improved public transport and freight carriage.
- Recent investment in improved rail transport (high-speed train, upgrading Barcelona commuter train services) has increased the competitiveness of this means of transport after a number of years of major crisis.
- The future rail development of the Mediterranean corridor (with standard gauge lines) that the European Union may include in its strategic transport infrastructure planning will facilitate the creation of new logistics parks and the establishment of new enterprises and logistics activities in Barcelona and Catalonia.
- The use of new management and administration methods and new technology in land transport has streamlined and automated processes and made it possible to offer new services with greater added value. The progressive inclusion of these methods and technologies is a key factor both for the sector's development and also for overall economic development.
- The European Union has spent a lot of money on R&D for clean vehicles, which is an opportunity to apply new technologies to land transport.
- The addition of new countries to the EU means an increase in the number of people who can travel freely around Europe, with the opportunities that this presents in terms of increasing passenger numbers and trade in goods.
- The availability of integrated and intermodal transport cuts transport times and costs and improves service quality.
- The development of new technology for transport systems, new engines and the use of biofuels bring environmental benefits in the shape of lower CO₂ emissions.

07

Useful links

Spanish organisations

National Transport Committee (CNT)

<http://www.fomento.es/>

Renfe

<http://www.renfe.es>

Barcelona Metropolitan Transport (TMB)

<http://www.tmb.cat>

Government of Catalonia Railways (FGC)

<http://www.fgc.cat/>

Catalan Commuter Railways

<http://www.rodaliesdecatalunya.cat>

International events (fairs, conferences, etc.)

International Week of Transport and Logistics (SITL, France)

<http://www.sitl.eu/index.php?Lang=FR&argRedirect=FR|ECO>

Trade fair for materials handling and logistics (ProMat, USA)

<http://www.promatshow.com>

Specialised Logistics and Goods Haulage Fair (Logis Expo, Spain)

<http://www.logisexpo.es>

International Railway Technology Fair (Rail Spain, Spain)

www.feriazaragoza.es/rail_spain.aspx

Spanish events (fairs, conferences, etc.)

International Logistics and Transport Conference

<http://www.silbcn.com/cat/>

International themed portals

European Transport Portal

http://europa.eu/pol/trans/index_en.htm

Spanish themed portals

Transport

<http://www.transportes.com>

Logistics and transport (L&T)
<http://www.logisticaytransporte.es/>

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