



**TOP  
DUTCH**

**A good place  
to be great**

# LOGISTICS

**Enjoy effortless access to the European market from your greenfield location in the TopDutch region via the best infrastructure in Europe, and become part of a green, talented and digital ecosystem building the next operating system for logistics.**

**In the 16<sup>th</sup> century, the Dutch crossed the oceans as the world's first multinational and publicly traded company, the Dutch East India Company. We were driven to become one of the largest international traders, and we did so with success. With a world-class infrastructure of seaports, rails, roads, waterways, airports and knowledge of logistical processing, the Netherlands is the best-connected country in the world and the logistical gateway to Europe. Intensifying globalization, travel, trade and e-commerce demands exploration of optimized logistical trade routes and operational excellence for sustained growth. In TopDutch, we are developing the next operating system of logistics. Here, we deliver the future.**

**1. Gateway  
to EU market &  
locations  
available**

**2. Best connected  
country &  
multimodal  
location**

**3. Energy  
Transition  
& Hydrogen  
Capital of  
Europe**

**4. Developing  
next operating  
system for  
logistics**

**5. Excellent  
education  
& access to  
flexible labor**

# 1. GATEWAY TO EUROPEAN MARKET AND GREENFIELD LOCATIONS AVAILABLE

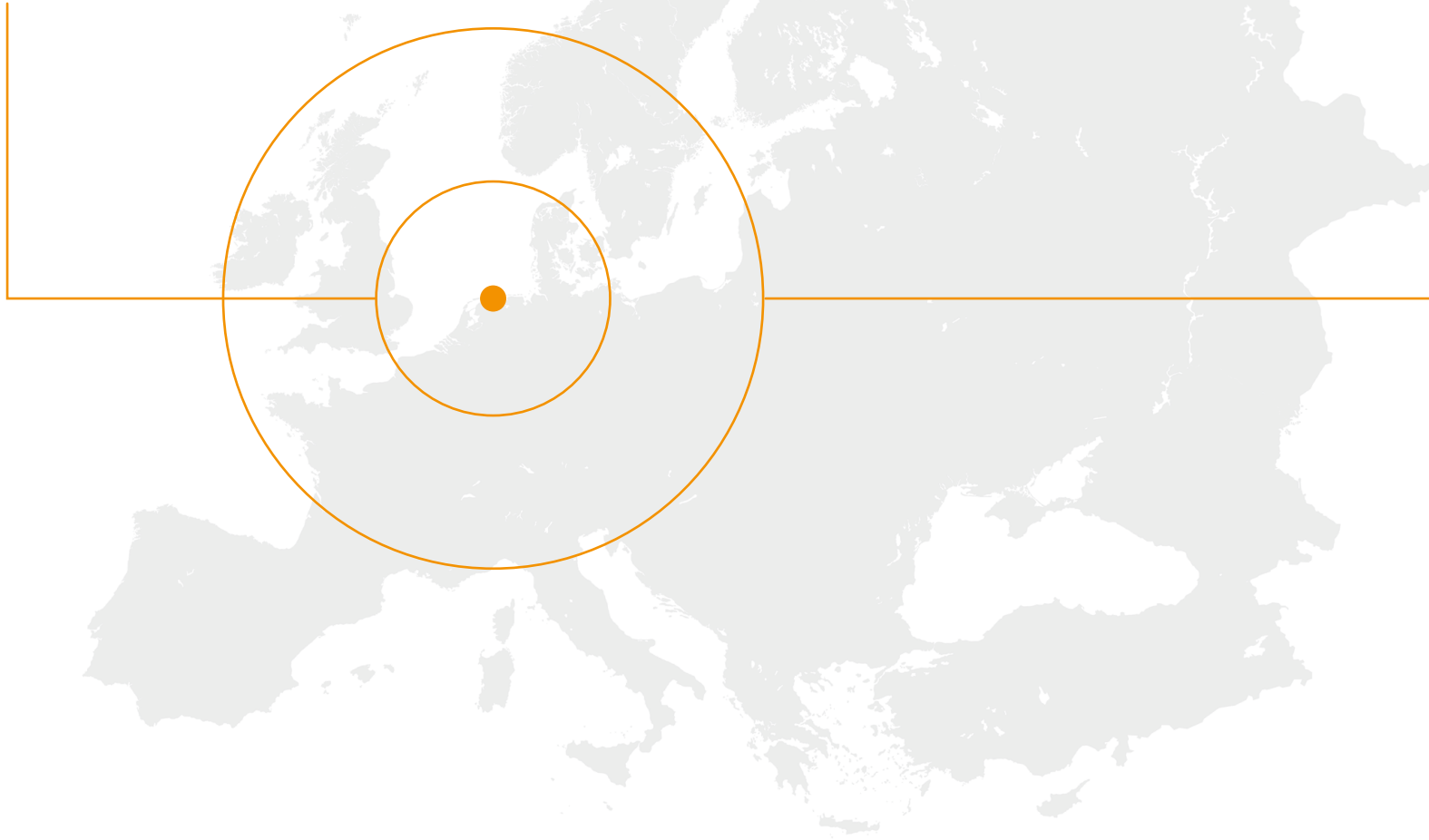
The Netherlands provides **direct access to the European market**, the second largest economy worldwide. The Northern Netherlands has large **greenfield locations** available.





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- A satellite night-time image of Europe, showing city lights and coastlines. Three concentric orange circles are drawn around the Netherlands, indicating the reach of its market. The background is dark, with the landmasses of Europe and Africa visible.
- **Proximity to market with 170 million customers within a 500 km radius**, representing 60% of the EU's purchasing capacity and 244 million consumers within 1,000 km.
  - **The major European economies Germany, France, UK and Benelux are within a day's reach** from the Netherlands, most European countries in 1-3 days travel time with regular road transport.

**170 million consumers**  
**within 500 km**



## Proximity of European demand to the TopDutch region

**244 million  
consumers  
within 1,000 km**

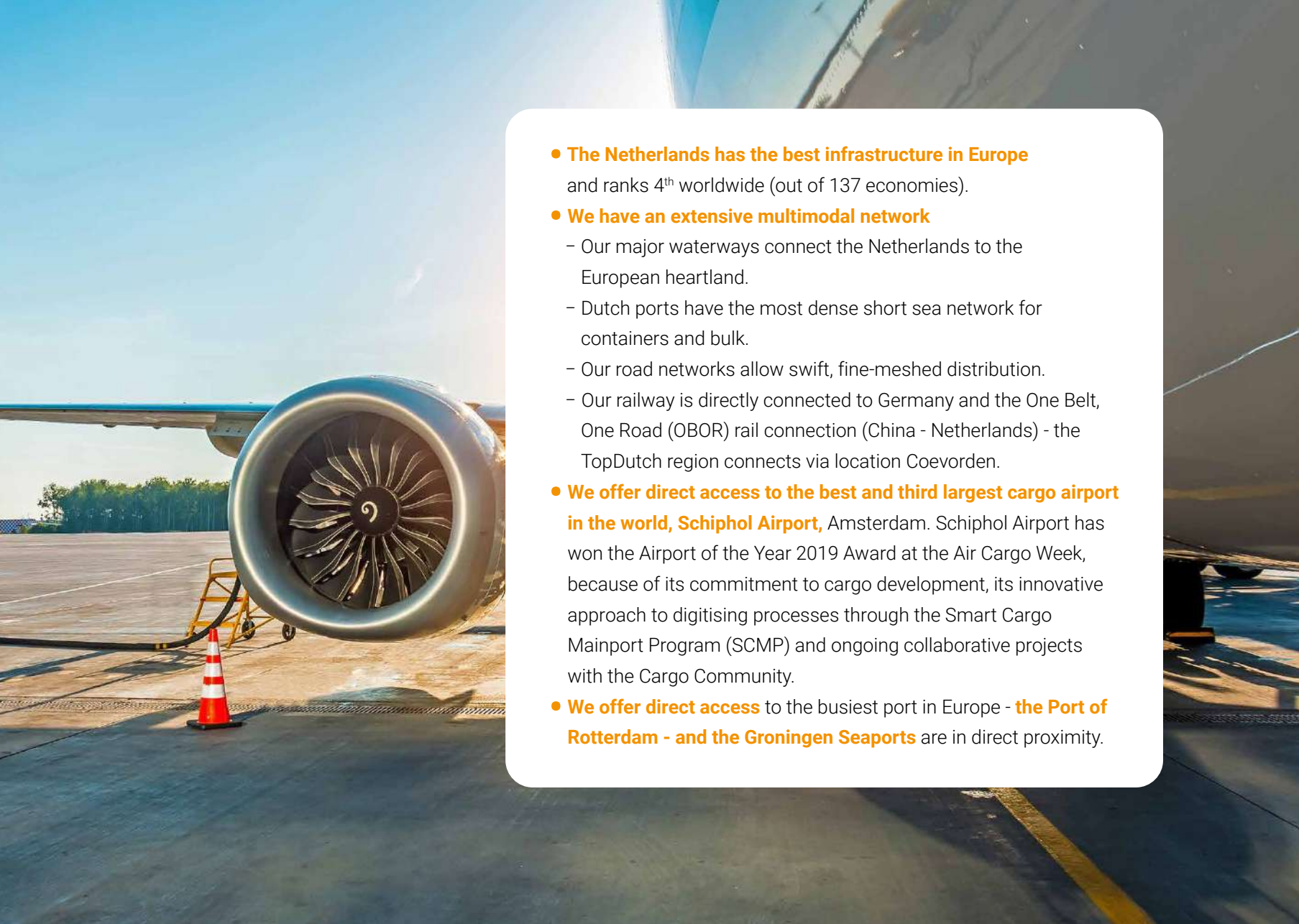
- **We are at the heart of major traffic routes across Europe:** the Netherlands - together with Germany, Belgium, France, and Luxembourg - accounts for 25% of all cross-border traffic in the 28 EU member states
- **A dense highway and railway network** are positioned directly on three out of the nine major corridors of the Trans-European Transport Network and connect the Netherlands to all European markets
- **The Netherlands is the best overall performer in trade facilitation worldwide**, because of its pro-business attitude, and speedy transshipment of goods with low risk of delays. The Netherlands scores 93% on the UNESCAP 2016, compared to the European average of 62%.
- **The Netherlands has the best VAT regime in the European Union.** The Netherlands scores 14/14 on the Deloitte VAT index of 2016. Our companies experience a considerable cash flow advantage and low administrative burden because of the Dutch VAT system offering VAT deferment at import.
- **The TopDutch region has large greenfield locations available at competitive costs** in the generally densely populated Netherlands.

# 2. BEST CONNECTED COUNTRY AND MULTIMODAL LOCATION

**The Netherlands is the world's most logistically connected country. For the fourth time, DHL's 2018 Global Connectedness Index has ranked the Netherlands number one.**



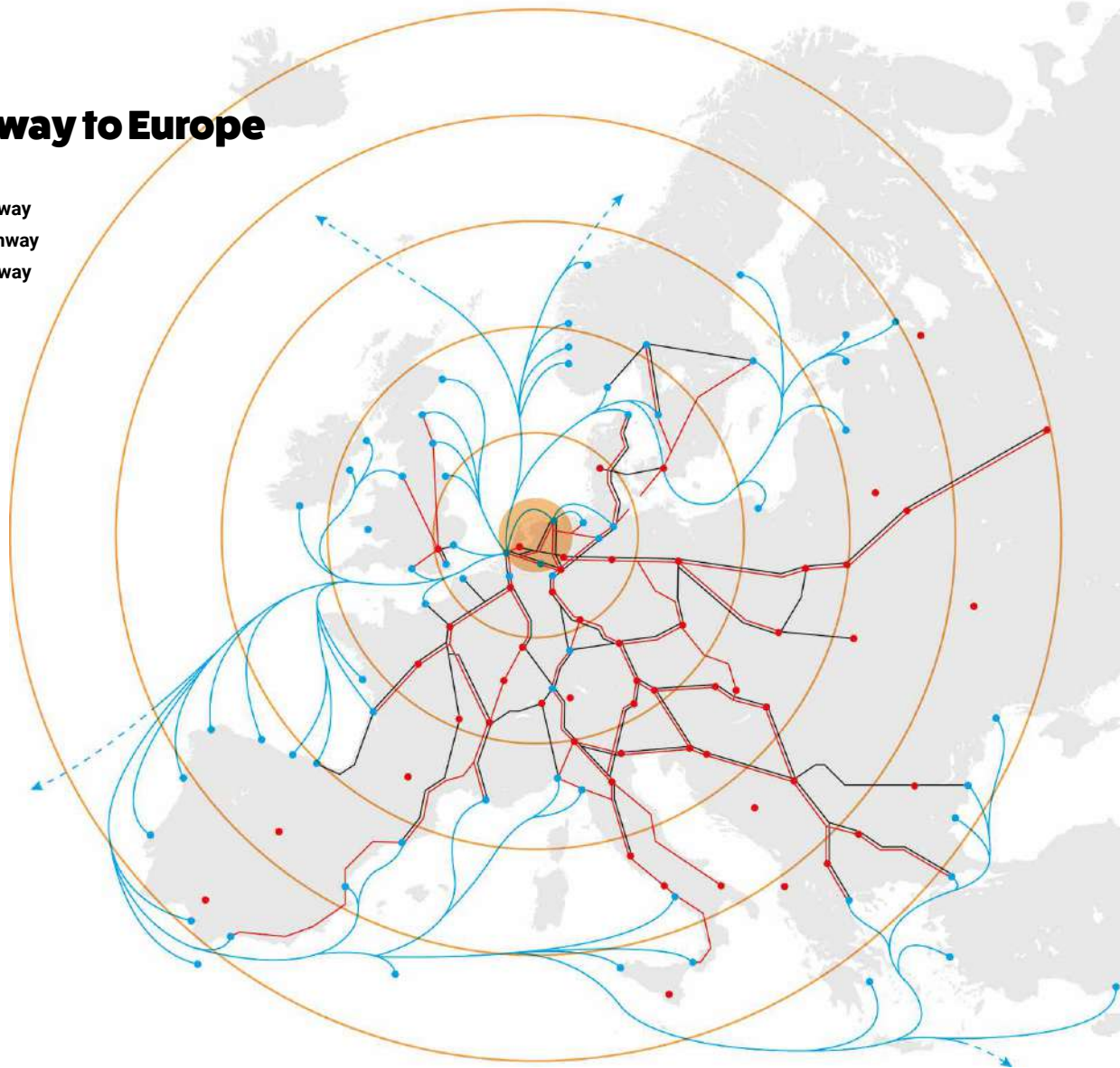




- **The Netherlands has the best infrastructure in Europe** and ranks 4<sup>th</sup> worldwide (out of 137 economies).
- **We have an extensive multimodal network**
  - Our major waterways connect the Netherlands to the European heartland.
  - Dutch ports have the most dense short sea network for containers and bulk.
  - Our road networks allow swift, fine-meshed distribution.
  - Our railway is directly connected to Germany and the One Belt, One Road (OBOR) rail connection (China - Netherlands) - the TopDutch region connects via location Coevorden.
- **We offer direct access to the best and third largest cargo airport in the world, Schiphol Airport**, Amsterdam. Schiphol Airport has won the Airport of the Year 2019 Award at the Air Cargo Week, because of its commitment to cargo development, its innovative approach to digitising processes through the Smart Cargo Mainport Program (SCMP) and ongoing collaborative projects with the Cargo Community.
- **We offer direct access** to the busiest port in Europe - **the Port of Rotterdam - and the Groningen Seaports** are in direct proximity.

# Gateway to Europe

- Seaway
- Highway
- Railway



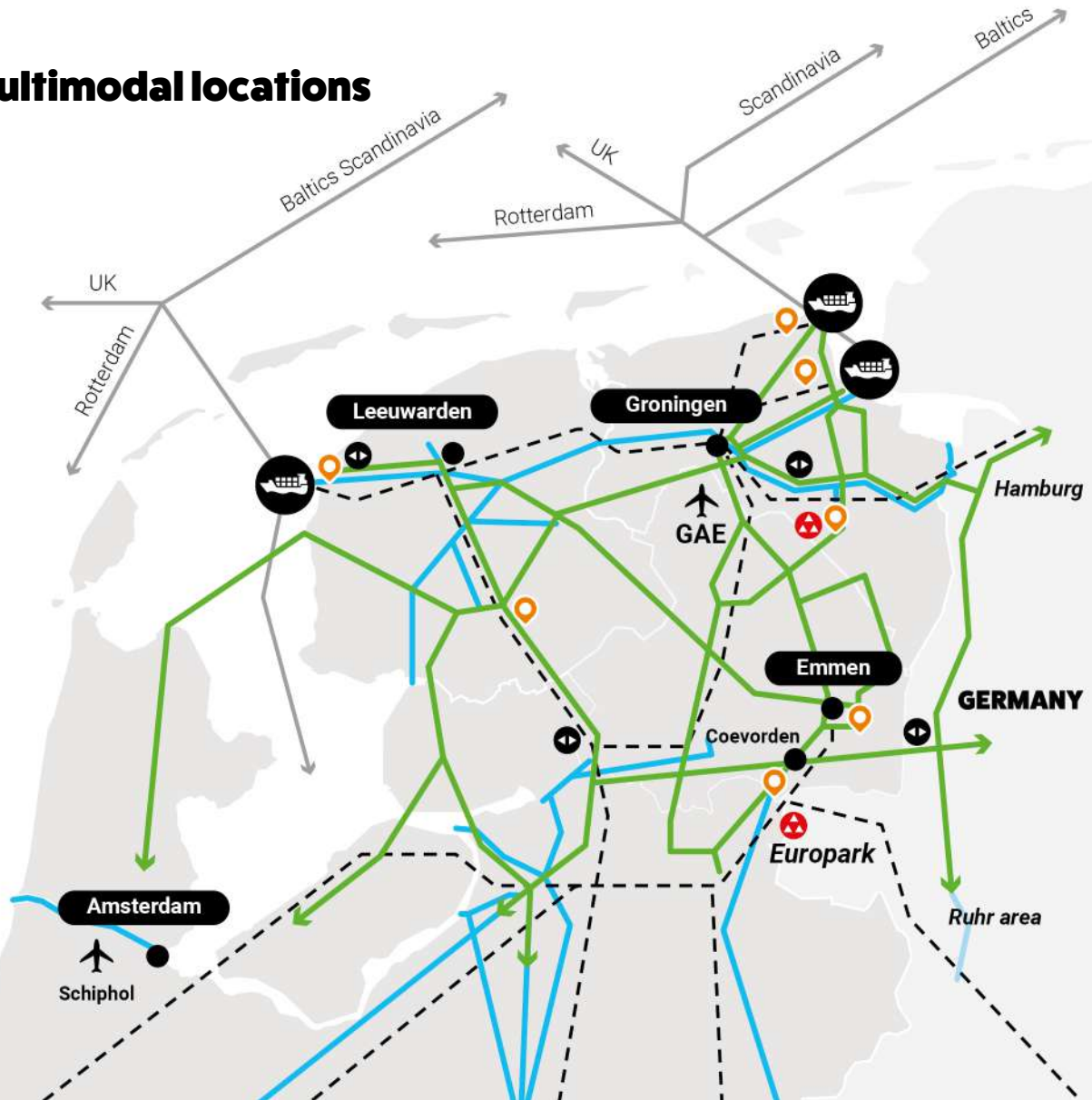
## Europe's most connected countries




Source: DHL connectedness index

# TopDutch multimodal locations

- Highway
- Railway
- Waterway
- Trimodal terminal
- Container terminal
- Airport
- Seaport
- Logistic hotspot





**Our railway is directly connected to  
Germany and China, via the One Belt,  
One Road (OBOR) rail connection.**

# **3. NATIONAL SUSTAINABLE ENERGY TRANSITION & ...**

**... Hydrogen Capital of Europe.**

**The Netherlands set out on June 28th of 2019 the National Climate Agreement, an agreement between more than 100 stakeholders to structurally tackle the energy transition. These targets will drive innovation and market development of emission-free transport and logistics.**





A close-up photograph of the front of a blue car. The car's body is a deep blue color. On the left, there is chrome lettering that appears to say 'Vandero'. To the right, there is a yellow rectangular light, possibly a fog light or a turn signal. The background is slightly blurred, showing more of the car's front end and some white lines, possibly from a road or a wall.

### National Sustainable Energy Transition

- **An overall target to have 49% less greenhouse gas emissions by 2030** versus 1990 levels. International lobby by the Netherlands to further increase the target to 55% by 2030 and climate neutrality by 2050.
- **Mobility target to sell only zero-emission vehicles by 2030** (BEVs or FCEVs) and have 3,000 heavy-duty FCEVs on the road in the **Netherlands by 2025 and to sell only zero-emission vehicles by 2030**. Electricity target of 84 TWh of renewable energy on the grid by 2030, covering 80% percent of today's electricity demand.
- **Strong support for off-grid power purchase agreements** for local industry, if required.
- **Electrolysis target of 3 to 4 GW nationwide by 2030**, enlarging the potential hydrogen supply for hydrogen fueled vehicles.



### Hydrogen Capital of Europe

- **2.5 GW of green hydrogen production capacity by 2030** - and 1 GW by 2023 - together with our 20 industry partners, including Eneco, ENGIE, Equinor, NAM, Gasunie, Nouryon, Vattenfall, Shell and others.
- **A Northern hydrogen transmission pipeline network** from Groningen Seaports to Rotterdam and Limburg will be available by 2021, and will be expanded to Germany's Ruhr district by 2023.
- **100 hydrogen refueling stations across the Netherlands:** 30 to be established by 2023, 8 of which are in the Northern Netherlands.
- **Three hydrogen innovation start-up centers.**



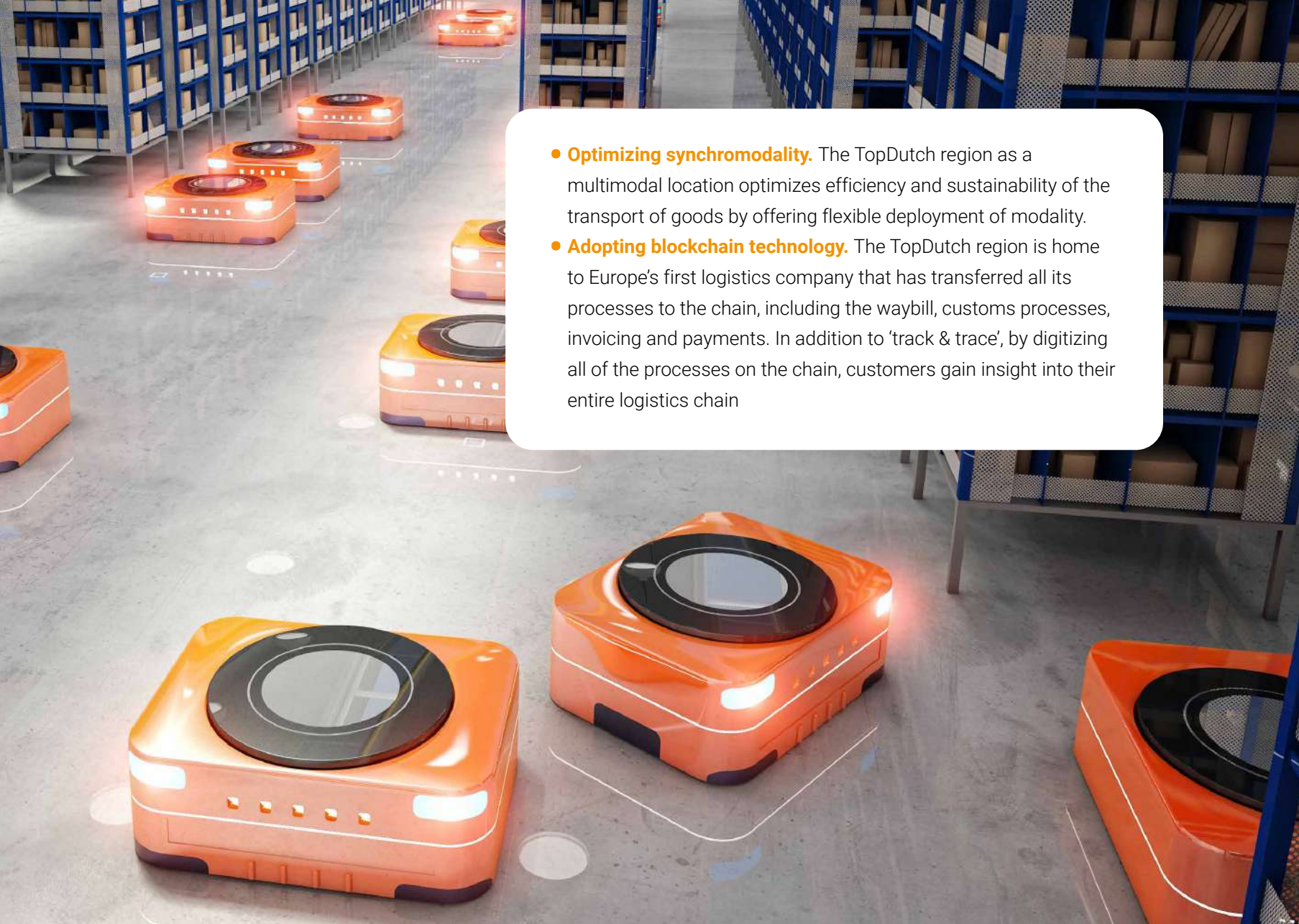


**The TopDutch region**  
is committed to building  
the number one ecosystem  
for green hydrogen in Europe,  
**enabling transport and  
logistics fuelled by green  
hydrogen.**

# 4. DEVELOPING THE NEXT OPERATING SYSTEM FOR LOGISTICS

**The TopDutch region is dedicated to develop the next operating system for logistics; green and digitized.**





- **Optimizing synchromodality.** The TopDutch region as a multimodal location optimizes efficiency and sustainability of the transport of goods by offering flexible deployment of modality.
- **Adopting blockchain technology.** The TopDutch region is home to Europe's first logistics company that has transferred all its processes to the chain, including the waybill, customs processes, invoicing and payments. In addition to 'track & trace', by digitizing all of the processes on the chain, customers gain insight into their entire logistics chain






**FRAGILE**  
Handle With Care  
DO NOT DROP!

**24h**  
IMPACT

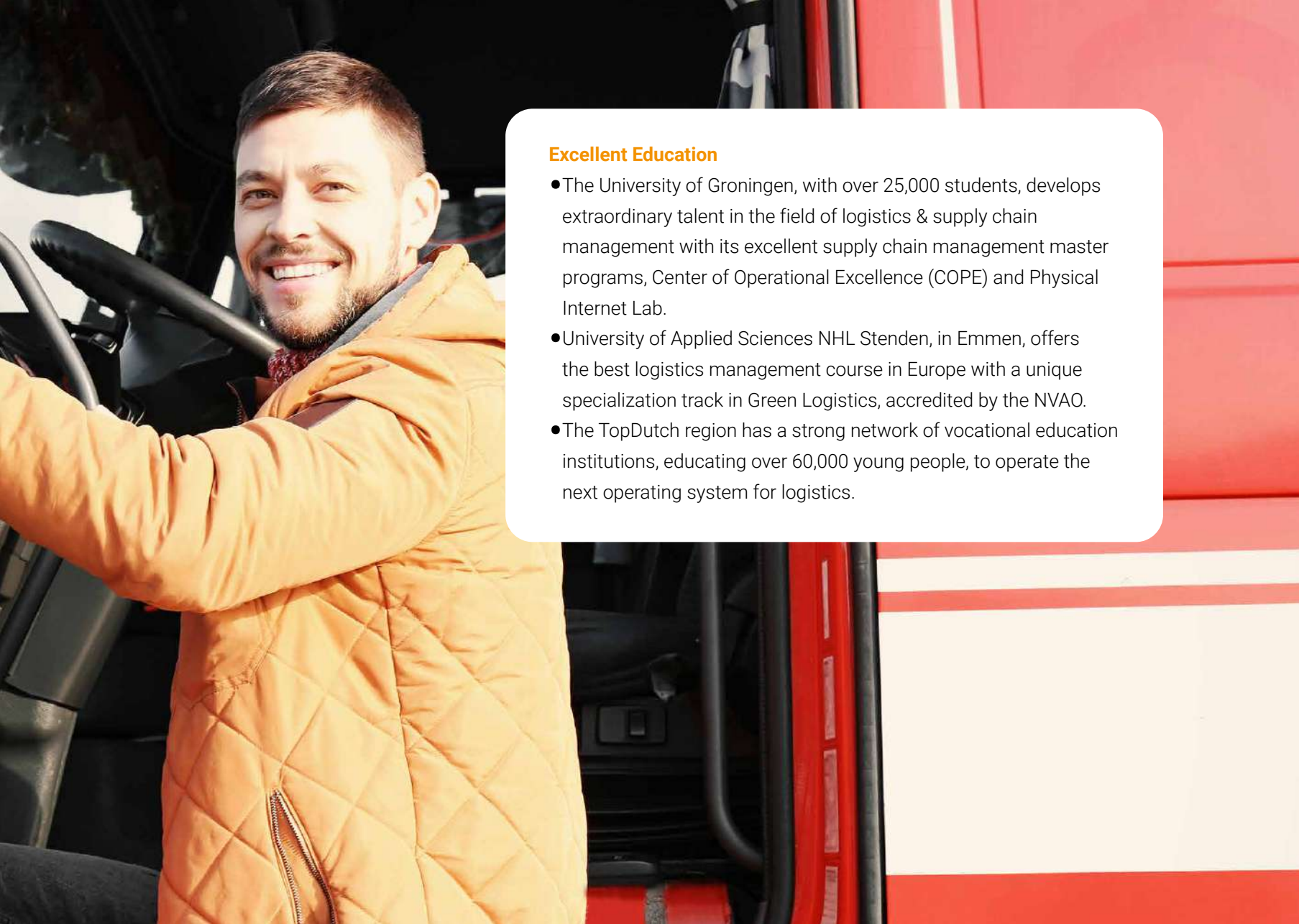


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- **5G living lab improving logistic efficiency.** The TopDutch region is home to the first rural 5G living lab, where autonomous driving and platooning strategies are optimized in order to reduce logistical inefficiencies, created by unnecessary acceleration and braking, movements, distance travelled, etc.
  - **Smart warehousing.** The TopDutch region with its industry network 'Region of Smart Factories', develops shared facilities and smart warehouses that have fully digitized processes and 'employ' robots and stock-counting drones.
  - **Developing new 'greener' fuels.** Cross-linked with our energy industry, we develop new fuels to make transport green in all modalities, including fuels such as biogas, LNG, electrification and green hydrogen.
  - **Developing a fully automatic, self-organized logistics system.** At the Physical Internet Lab from the University of Groningen, researchers, government and industry work together on developing the next operating system for logistics in which means of transport and storage space are shared freely and easily, and goods and packages move through fully open and connected networks.

# 5. EXCELLENT EDUCATION & ACCESS TO FLEXIBLE LABOR

**The Netherlands -and the TopDutch region  
specifically - offers access to talent and a  
flexible labor pool.**





### Excellent Education

- The University of Groningen, with over 25,000 students, develops extraordinary talent in the field of logistics & supply chain management with its excellent supply chain management master programs, Center of Operational Excellence (COPE) and Physical Internet Lab.
- University of Applied Sciences NHL Stenden, in Emmen, offers the best logistics management course in Europe with a unique specialization track in Green Logistics, accredited by the NVAO.
- The TopDutch region has a strong network of vocational education institutions, educating over 60,000 young people, to operate the next operating system for logistics.







### **The Netherlands offers the most flexible labor pool**

- In the Netherlands, employers have to pay no premium for work on night shift, weekly rest day or overtime.
- Low union membership: In 2018 only 20% was unionized and this percentage is decreasing (ETUI, 2018).
- Very low strike record (average days not worked per 1,000 employees is 13, compared to 17 in Germany, 96 in Belgium, 20 in UK, 125 in France, 68 in Spain, 54 in Denmark, 66 in Norway).

### **The TopDutch region offers access to the largest flexible labor pool**

- Our region has the least friction on the labor market within the Netherlands, offering the largest available pool of flexible labor.
- We educate over 85,000 students, many of whom are willing to take on flexible jobs.



**Are you interested in exploring what  
your business possibilities could be?  
Connect with **Wim A.B.**, our Logistics  
expert.**

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## **JOIN TOPDUTCH**

**Want to find out more about what  
makes the TopDutch region a good  
place to be great, or view the digital  
edition? Head over to our website  
[www.topdutch.com](http://www.topdutch.com)**



## The TopDutch collective:

### Economic region



### Executive partners



Ministerie van Economische Zaken  
en Klimaat



Netherlands Foreign  
Investment Agency

### Regional partners



### Knowledge partners



### Industry partners



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