

# PROJECT JOURNAL 2

NOVEMBER 2025 - APRIL 2025

## Ecosystem Mapping & Digitising Urban Logistics

Interreg  
North Sea



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GLEAM NSR

### INTRODUCTION

As the GLEAM NSR project enters its second year, momentum is building across our consortium of partner cities, knowledge institutions, and private sector actors. Having laid the groundwork by mapping urban logistics ecosystems and identifying key policy instruments, we are now shifting our focus toward **engaging stakeholders, testing digital tools, and preparing for city dialogues** that will shape the future of just and green logistics.

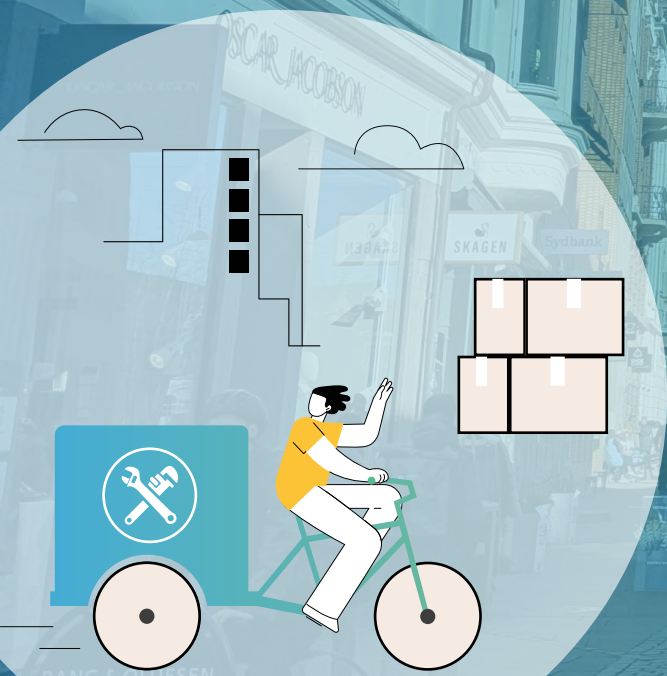
This project journal captures the highlights from the last six months, a period marked by dynamic exchanges, learning, and progress. It includes insights from our November Lunch & Learn session, where cities shared their experiences with **ecosystem mapping**; the findings from our in-depth **report on digitised urban logistics**; and a recap of our latest **partner meeting in Aarhus**. We also take a look at the preparatory steps underway for the upcoming City Dialogues—an essential step in ensuring that the policies we co-develop are grounded in real-world needs and inclusive of the perspectives of small and medium-sized enterprises (SMEs), often underrepresented in policy design.

The stories and developments shared here reflect the diversity of approaches across our cities, as well as the shared ambition that unites them: **to build effective, inclusive, and climate-resilient urban logistics systems.**



MAILING LIST  
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**gleam nsr**  
Green logistics for a just net zero carbon  
economy in the North Sea Region





## EVENT HIGHLIGHTS

In addition to regular online meetings, GLEAM NSR partners came together for two key events that advanced our collective understanding and collaboration.

### Lunch & Learn - November 14

Our second Lunch & Learn focused on **urban logistics ecosystem mapping**. Cities shared methodologies and early findings:

- **Rotterdam** detailed how it combines vehicle data with targeted outreach to SMEs ahead of its low-emission zone.
- **Aarhus** presented insights from national vehicle registration data, identifying SME fleet profiles and emissions exposure.
- **Leuven** introduced its logistics segmentation approach, highlighting high-impact sectors like catering and construction.

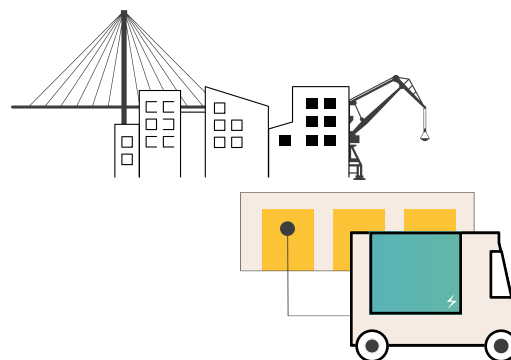
The session underscored the value of diverse mapping strategies and the need for tailored engagement.

### Partner Meeting - Aarhus, April 1-2

Held in Aarhus, this in-person meeting allowed partners to:

- Reflect on the **Digitised Urban Logistics report** and its policy applications.
- Plan the upcoming **City Dialogues**, brainstorming methods for meaningful stakeholder inclusion, specifically with SMEs.
- **Share experiences** on data collection and use, service logistics, communication strategies, and the reality of SMEs in Europe.
- Learn about the **city of Aarhus** and visit local initiatives showcasing Aarhus' commitment to green mobility and climate resiliency.

Together, these events strengthened peer exchange and prepared all partners for the next project phase.



Partner Meeting 3 - April 2025, Aarhus



# DIGITISING URBAN LOGISTICS: FINDINGS

In January, the University of Groningen carried out comprehensive research on Digitised Urban Logistics as part of GLEAM NSR's Work Package 1. Stay tuned for the final report, currently under development, that will provide a critical snapshot of how cities are using data to shape more effective, sustainable, and inclusive logistics policies.

## Why Digitisation Matters

Urban logistics operates at the intersection of city planning and commercial delivery. Managing this complexity requires detailed insights into vehicle flows, stakeholder behaviors, and infrastructure needs. The report highlights how cities can leverage both static data (e.g. traffic counts, surveys, vehicle registration) and dynamic data (e.g. ANPR cameras, GPS vehicle tracking) to better inform policy decisions.

## Key Findings from Across the GLEAM NSR Cities

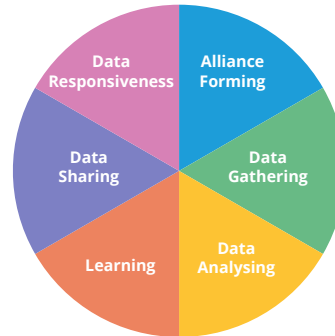
### 1. Data Sources and Usage

- Cities reported between **11 and 50 distinct data sources**, including internal administrative records, national databases, and third-party tools.
- **Floating car data** (e.g. TomTom GPS traces) and **automated license plate recognition (ANPR)** are used in 4 of the 5 cities, although GDPR restrictions can limit how they are used.
- **Rotterdam and Aarhus** combine national vehicle registration data with local traffic counts to identify logistics activity by company size and fuel type.

- **Leuven** uses simulation tools to estimate delivery flows by sector—showing that **catering and construction logistics produce disproportionately high emissions**, even with a lower share of total kilometers driven.

### 2. Digital Capacities and Gaps

The report introduces the Data-Driven Urban Logistics Policymaking Wheel, a self-assessment tool used by cities to evaluate their capabilities across six core areas:



Each area is broken into sub-dimensions and scored using a red–amber–green system. Initial results showed:

- Most cities excel in **static data gathering** (e.g., location of loading zones, vehicle types), but struggle with **making data actionable** or using it to adapt policies.
- **Data sharing internally** within city departments is often stronger than external sharing with stakeholders or the public.
- **Privacy laws**, especially under the GDPR, were identified as a **major barrier** for using high-resolution logistics data in Belgium.

### 3. Simulation and Modeling

- **Rotterdam's Tactical Freight Simulator (TFS)** is a standout example of advanced modeling. It simulates

freight flows at the shipment level using real-world trip diaries and can test future policy scenarios like zero-emission zones, micro-hubs, or road pricing.

- **Leuven and Le Havre** are similarly developing or accessing models to evaluate logistics by sector and anticipate future vehicle demand and emissions patterns.
- Modeling helps cities explore **"what-if" scenarios**—e.g., estimating CO<sub>2</sub> reductions from modal shifts or fleet electrification before implementation.

### 4. Data-Driven Engagement

- Cities like **Rotterdam** use data to **target SMEs** most affected by upcoming emissions regulations, offering tailored outreach and incentives.
- **Aarhus** identified that **SMEs own 48% of the city's commercial vehicles**, many of which are vans in smaller companies and trucks in medium-sized ones. 99% of these vehicles run on fossil fuels, underscoring the urgency for tailored support in the green transition.

## Takeaway Messages

- Data is **not just technical—it's strategic**. Cities need to match their ambitions with the right combination of data, skills, and partnerships.
- There is **no single model**: some cities thrive with limited but well-used data, while others leverage advanced simulation tools.
- Even basic datasets, if used creatively and collaboratively, can lead to more **targeted, inclusive, and impactful urban logistics policies**.

The report sets the stage for cities to integrate these insights into stakeholder dialogues and upcoming policy planning phases.



# CITY DIALOGUES: PREPARATION PHASE

City Dialogues are the next milestone in GLEAM NSR, offering a platform for cities to engage local stakeholders — especially SMEs — in shaping sustainable, inclusive, and effective policy solutions and frameworks.

## Why SMEs Matter for Urban Logistics

With over **25.8 million SMEs in Europe**, including **24.2 million micro-enterprises**, SMEs are essential to Europe's economy and the logistical backbone of cities. They:

- Operate a large share of urban delivery and service vehicles.
- Face mounting challenges: inflation, energy prices, and regulatory burdens.
- Often lack the capacity or resources to adapt to rapidly changing urban logistics policies.

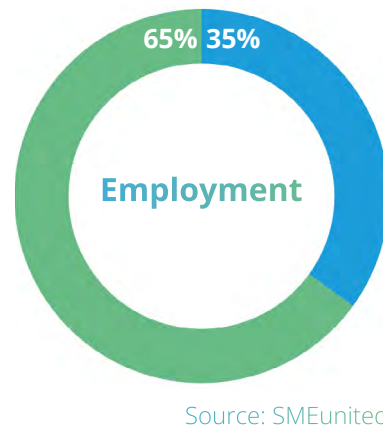
Despite their key role, SMEs are typically **underrepresented in policymaking** around digitalisation, zero-emission zones, and logistics restructuring. Ensuring their voices are heard is essential for both the effectiveness and fairness of new measures.

## Preparatory Work Underway

In light of this, partner cities are actively preparing to:

- **Mapping key SME actors** using prior data collection efforts. Certain cities are going farther and targeting specific sectors, like construction in Leuven and Mechelen.
- **Tailor engagement strategies** to address capacity constraints and communicate policy changes in clear, actionable terms.
- **Building on local initiatives** (e.g. Logistiek 010 in Rotterdam, Sustainable Logistics Covenants in Mechelen) to anchor participation.

The dialogues aim to turn policy ambitions into shared solutions—by listening, co-designing, and ensuring that no business is left behind in the green transition.



## WHAT'S NEXT

Looking ahead to mid-2025, the GLEAM NSR consortium is entering a pivotal stage of the project. Upcoming milestones include:

- Hosting **City Dialogues** in each partner city.
- Supporting cities as they begin co-creating **action plans** or policy roadmaps with stakeholders.
- Continuing **Lunch & Learn** webinars - stay tuned for more info!
- Evaluating how **digital tools and data strategies** are being integrated into real policy development processes.
- A training session with the City of Rotterdam focused on learning about their **cargo bike logistics simulation model**.