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## PORT OF KOPER AS KEY COMPANY OF THE SLOVENIAN TRANSPORT LOGISTIC CLUSTER

### ABSTRACT

*Today, the countries of Central and Eastern Europe (CEE) have developed into a fast growing and promising part of Europe. The vision of the management of the Port of Koper is to become the most important logistic centre for these countries. In the future the North Adriatic region will have to cope with further challenge, i. e. an increasing presence of the Asian Pacific economies on the European continent and in the CEE countries in particular. For the traffic flows from this source, the North Adriatic is, from the geo-transport aspects the most convenient seaway/ route.*

*It was for this reason that the Port of Koper as the key company joined a pilot project - STLC (Slovenian transport logistic cluster) as a stakeholder. The main purpose of the STLC is to promote the Slovenian transport route using the Port of Koper as the focal point.*

*This paper aims to: (I) review the current state of the development of Slovenian transport logistic cluster, (II) assess the potential benefits of such a cluster for the Port of Koper (III) introduce initial presentations, experiences and results.*

### KEY WORDS

*transport logistic cluster, Slovenia, Slovenian transport route, Central and Eastern European markets, Port of Koper.*

### 1. INTRODUCTION

Clusters definitely represent a novelty to the Slovene economy, yet in other parts of the world clusters are known as important stimulation factor in the field of development. Hence they enabled the assertion of competitive advantages, which led to their international prevalence.

In order to form a cluster, the partners who carry out team projects need to come up with a common strategy. Further, if the latter is to be successful, there needs to be high level of confidence among the partners, which is also of crucial importance for the successful development of the cluster. At the same time the cluster needs some kind of relatively independent organisational form, which should enable the partners

to give support to certain joint activities and which is to be financed by the system partners, though the state as financier is not unwelcome in the initial stages of the procedure. A cluster cannot be established by force; it is rather a spontaneous process that proceeds gradually and in line with the interests of the associate partners as well as with the pressures from the market. Should at any stage knowledge, innovation, and long-term development orientation be implemented, the chances for success are great.

Transport and logistics are the fields of business where company cooperation represents a base for solid and effective functioning. Normally, the initiator of a cluster would be the holder firm (in our case the Port of Koper): the firm with the necessary financial background, high value added (above the branch level), access to foreign markets, development potential, highly educated employees, and focused development strategy. In such case the company cooperation represents the key to the realisation of the set goals and fusion into a cluster represents the chance for the company to enlarge its own competitive advantage.

### 2. DEVELOPMENT AND THE CURRENT STATE OF SLOVENIAN TRANSPORT LOGISTIC CLUSTER

The accession to the EU represents a number of difficult questions for Slovenia, be it in the field of industry, be it in the field of the particular branches of industry, and last but not least, in the field of the companies themselves. The uncertainty surrounding the question of how to successfully protect national interests and thus enable the prospective business branches to assert themselves is progressively moving into the centre of attention.

A decision made by the Ministry of Economy regarding the encouragement of the clusters to boost the competitiveness of the national business and thus preserve certain strengths within Slovenian business branches is definitely to be praised. The question

posed here is whether the Slovenian economy is ready to accept such an initiative and use it in an optimally developmental way. Companies should not perceive the cluster opportunity as a short-term state funding; rather they should use the funds as a strategic incentive for the long-term quota/share/contribution. The state does not dictate clusters; it advises them and supports them. Considering the fact that clusters are open and thus adaptable organisation forms, where everyone has the right to find his or her suitable working conditions, the duty of the Slovenian clusters is precisely to find their own model and content and then bring it into life. The goal here is namely to enable the cluster members to pursue their business objectives by cooperation and at the same time raise the competitiveness of the cluster as a system. The members themselves find a reason to join the cluster and on the basis of their interests form strategies. In the process of joining the cluster they do not abandon their company's strategies, for the cluster represents merely the support, the new tool, with which the members complement their primary strategies, which is the case in every company. Clusters are not merely a capital linkage. Clusters can also be used to boost the synergic effects that alone the companies would not achieve. Scientific and research institutions can play an important role in the process, for it is up to them to make sure that the step from theory into practice runs smoothly, which is a great advantage for the effects of innovation.

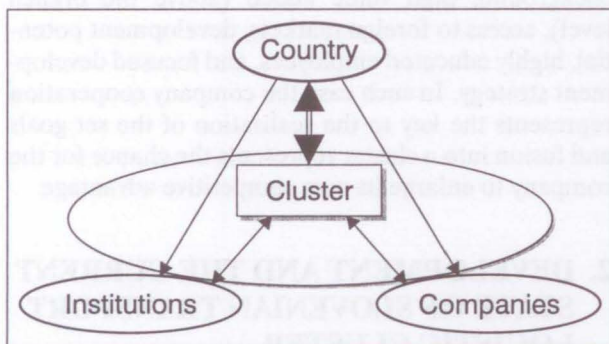


Figure 1 - The advantages of the cluster concept

Source: ITEO Counselling

In the year 2000 the Ministry of Economy of the Republic of Slovenia carried out a public tender for the choice of a pilot project of the cluster development in Slovenia. The purpose of the public tender was to test the interest as well as the abilities of the currently functioning production and service systems for carrying out the pilot cluster development project in Slovenia. The project was carried out in the years between 2001 and 2003. Six applications were handed in. Based on the commission's delivery the Ministry accepted the qualifications of three of the applicants and thus enabled them to carry out the pilot cluster devel-

opment project in Slovenian industry, among which the Port of Koper is to be highlighted. The qualified applicants were asked by the Ministry to present the bidding to carry out the project. The year 2001 witnessed the development of the following clusters: the transport-logistic (TLC), automobile (SAC), and tools cluster (SOC). The state also decided that the three qualified applicants should be entitled to a certain budget that should cover up to 40% of the costs of the actual establishment of the clusters and the costs of the joint projects.

In order to start operating the TLC needed to decide upon the right strategic goals that would reflect the wishes and expectations of all the cluster members. We say that the common future of a cluster is possible only if the goals are clearly set and each member finds its role in it. Future activities and development of the cluster as well as its organisation need to adjust to this.

The STLC pilot project was divided into three phases:

- July - December 2001 => identification of the cluster-oriented working model, forming of a common vision and strategy, defining further development projects.
- January - December 2002 => final establishment of the cluster as a system, project activities.
- January - December 2003 => work on the individual projects that enable the growth and development of the cluster and use its infrastructure optimally so that each member has a more competitive market presentation.

The goals of phase one were the following:

- Forming of a common strategy.
- Conclusion and determination of the members.
- Establishing of an organisational model for the proper functioning of the cluster.
- Highlighting future common projects.
- Sharing of expertise and information.

Results of phase one:

- Defining the common vision for the cluster - offer a complete transport-logistic service:
  1. Freight-forwarding services;
  2. Shipping agent services;
  3. Port terminal management;
  4. Storage, loading and other extra activities;
  5. Operating distribution net of road and railway transports.
- Good preparation of the basic orientation for future activities and work of the cluster.
- Promotion of STLC at the Conference in Tel Aviv (Israel) and the making of the first joint STLC brochure.

The first phase has prepared the ground and the action plan for further cluster work. The action plan,

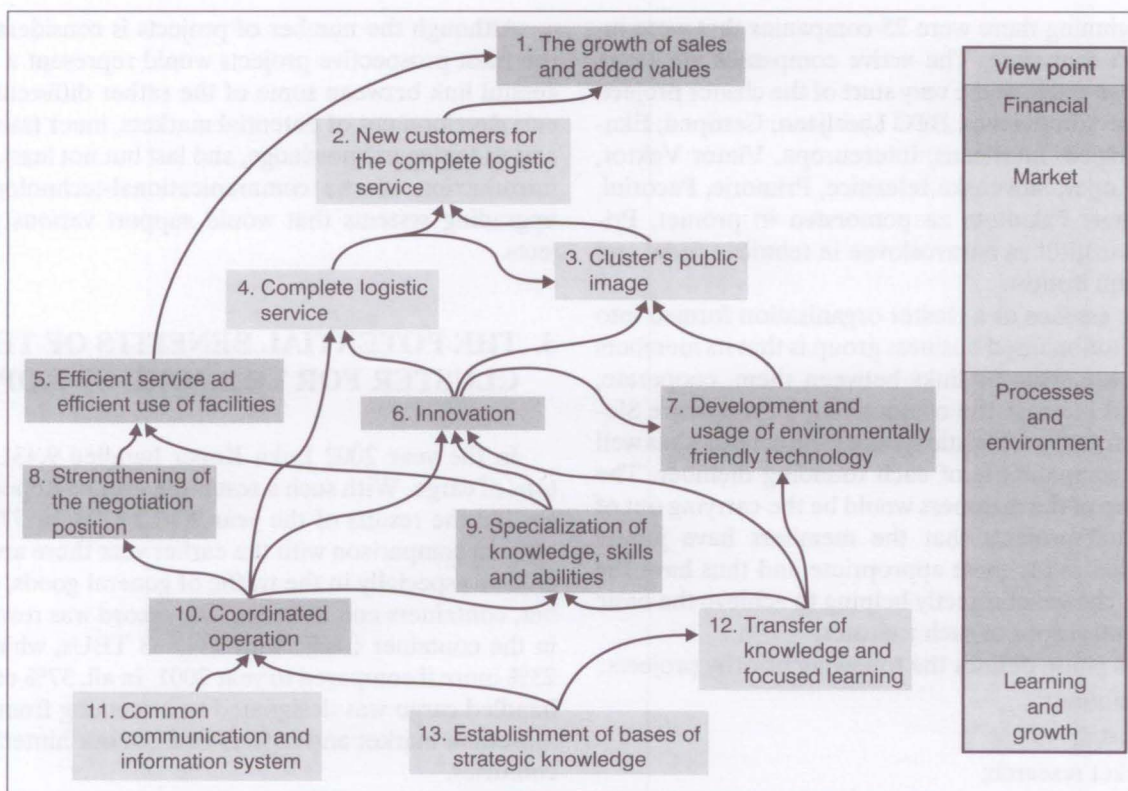


Figure 2 - Strategic TLC folder

Source: ITEO Counselling

and that of future activities, is in line with the strategic orientation with which they agree and which is then confirmed by all the cluster members. Further, other projects were highlighted, i. e. projects that are currently being carried out now and are supplemented by their own supporting companies, the duration of the procedure, individual activities, and anticipated costs.

17<sup>th</sup> April 2002 was the day when the representatives of the STLC cluster, which up to that point had

functioned on the initiative of the Ministry of Economy merely as a project, closed a deal on the establishment of a business interest group called GIZ TLC (Transport logistical cluster GIZ). A group of that kind appeared necessary, since the large number of cluster members called for a more institutionalised form, which would be able to meet the needs for an intensive connection among the founders of the GIZ TLC. There are 15 members of the cluster, whereas at

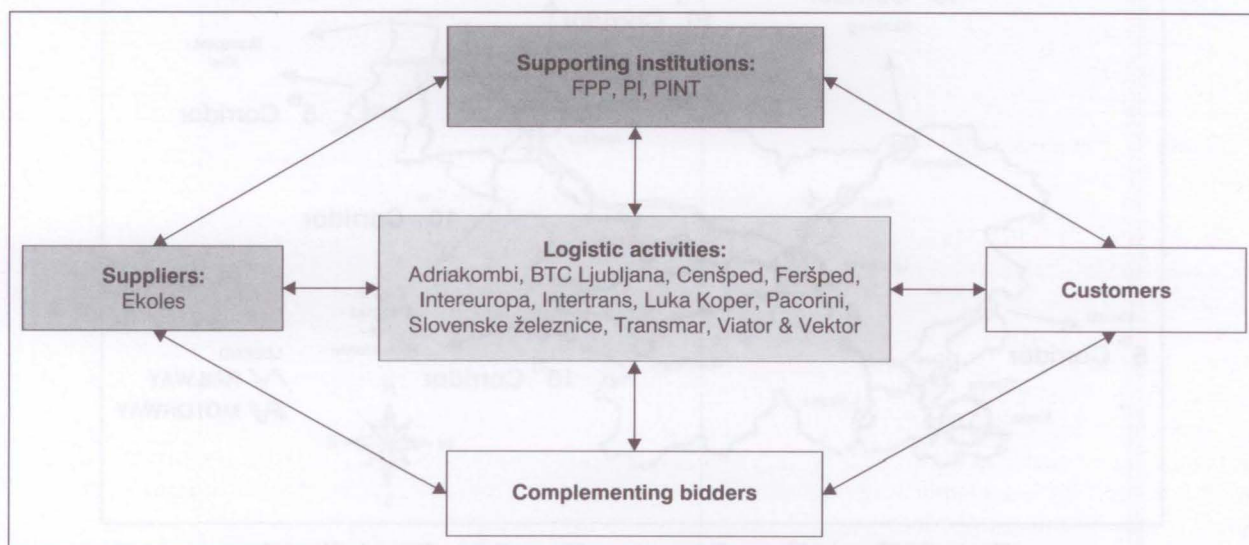


Figure 3 - A study of the TLC membership and their position in the cluster

Source: ITEO Counselling

the beginning there were 25 companies that were invited to cooperate. The active companies are those that were active at the very start of the cluster project, such as: AdriaKombi, BTC Ljubljana, Cenšped, Ekoles, Feršped, Intertrans, Intereuropa, Viator Vektor, Luka Koper, Slovenske železnice, Primorje, Pacorini, Transmar, Fakulteta za pomorstvo in promet, Primorski inštitut za naravoslovne in tehnične vede, and Prometni inštitut.

The essence of a cluster organisation formed into an institutionalised business group is that its members grow even stronger links between them, cooperate, and thus increase the compatibility of the entire Slovenian transport-logistic system (and activities) as well as the compatibility of each founding member. The next step of the members would be the carrying out of individual projects that the members have jointly identified as the most appropriate and thus have the biggest chance of directly helping to achieve the basic goals and visions of such a cluster.

This phase defines the following priority projects:

- Promotion;
- E-portal;
- Market research;
- Knowledge management;
- E-exchange of transport services.

Other projects:

- Distribution centres at locations in: Koper, Maribor, Novo mesto;
- Joint supply;
- Goods tracking;
- Package distribution;
- Air quality measurements;
- Optimisation of technology.

Although the number of projects is considerable, the most prospective projects would represent a successful link between some of the rather different areas: development of potential markets, inner training and widening of knowledge, and last but not least, the introduction of the communicational-technological upgrading systems that would support various projects.

### 3. THE POTENTIAL BENEFITS OF THE CLUSTER FOR THE PORT OF KOPER

In the year 2002 Luka Koper handled 9,431,496 tons of cargo. With such a result the Port of Koper exceeded the results of the year 2001 by 1% or 77,500 tons. In comparison with the earlier year there are increases especially in the traffic of general goods, timber, containers and alumina. The record was reached in the container traffic with 114,863 TEUs, which is 23% more if compared to year 2001. In all, 37% of the handled cargo was designated to or coming from the Slovenian market and 63% to or from our hinterland countries.

A larger volume of transport and consequently better exploitation of the Port of Koper and the railway have depended and will depend in the future on the increased transit. The Port of Koper envisions its possibility of further development in highway and railway connections in the direction Ljubljana - Maribor with a branch to Austria and Hungary. Taking all that into consideration, the geo-transport position requires a more rapid construction of the highway and railway network, chiefly in the main transit connections through Slovenia – the 5<sup>th</sup> and 10<sup>th</sup> Pan Euro-

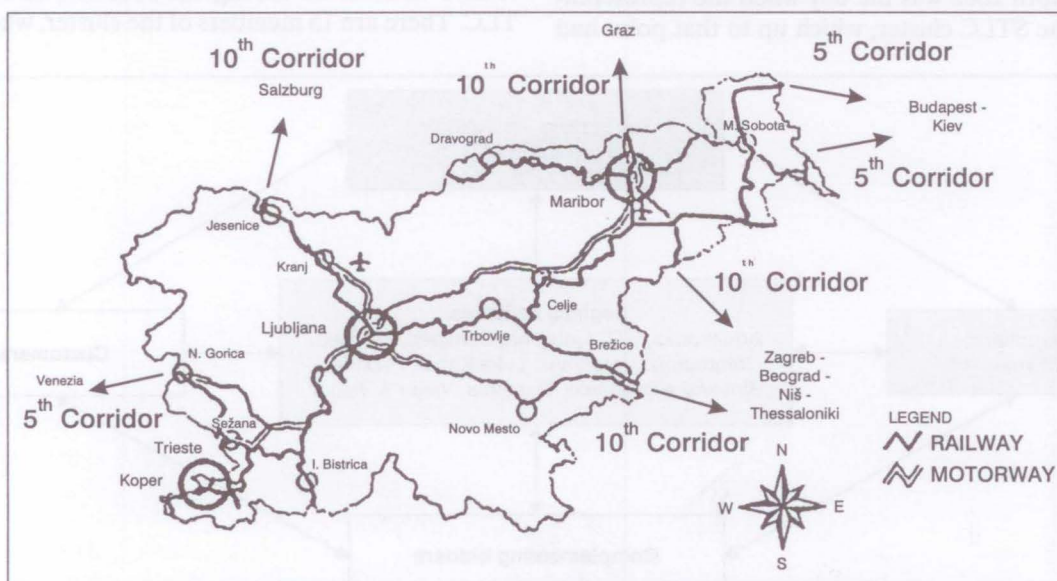


Figure 4 - 5<sup>th</sup> and 10<sup>th</sup> pan-European traffic corridors through Slovenia

Source: Traffic Institute of Ljubljana

pean traffic corridor (Fig. 4) for which also the European Union is interested (and also prepared to provide the funds for the construction). The Slovenian traffic cross comprises two legs: Šentilj/Spielfeld - Maribor - Ljubljana - Koper, with branches towards the Hungarian border and in the South West to Nova Gorica; then direction Jesenice - Ljubljana - Dobova towards Zagreb. The first leg signifies the connection with the international line Barcelona - Milan - Ljubljana - Budapest - Kiev (5<sup>th</sup> corridor); the second leg denotes further connection with Zagreb - Belgrade - the Balkan states - the Near East (10<sup>th</sup> corridor).

The geo-transport position requires also more rapid acceleration of development of interports in Ljubljana and Maribor as well as the Port of Koper (Fig. 4). The said interports and the Port of Koper should completely fulfil their functions as an organic complex of integrated structures and services with the aim of transporting cargo combining various kinds of transportation, which includes the railway discharging yard capable of making up and receiving complete train compositions, including piggyback ones. This yard should be connected with seaports, airports and large communication networks. Simultaneously, the respective subcentres of interports will have to be developed (Fig. 4).

Ljubljana and Maribor are the most important national and also relevant international E-transport hubs of Slovenia. The Port of Koper is one of the most relevant generators of the development of transport. The economic effects of port activity are multiply reflected in direct surroundings and wider environment. These effects are most visible in the activities of mari-

time, road and railway carriers, in freight forwarding, agencies, and in trade, catering, tourist, financial and other services. Per one unit of generated value in a direct port activity, eight additional value units are generated in the whole Slovenian economy.

### 3.1. The Port of Koper

The Port of Koper is a public limited company and operates as a holding.

The Port of Koper will try to assert itself as an international commodity centre. The strategy of the port company, as well as the changes in functional policies should contribute to build up higher competitiveness and a more efficient operation.

The strategy of the Port of Koper should be based on the following basic directions:

- the universality of the range of port services offered at the highest quality level;
- the Port of Koper company ('Luka Koper') - a commodity distribution centre;
- an efficient information network and logistical connection with the world;
- stability and profitability of the operation in the long run.

The strategic goal of the Port of Koper is to become one of the best ports in the southern Europe, to develop from a handling port into a commodity distributional centre (in view of attracting also the economies of the Far East, such as India, Indonesia, Australia, Korea, Japan, China, Africa, America, etc., in addition to the European ones).

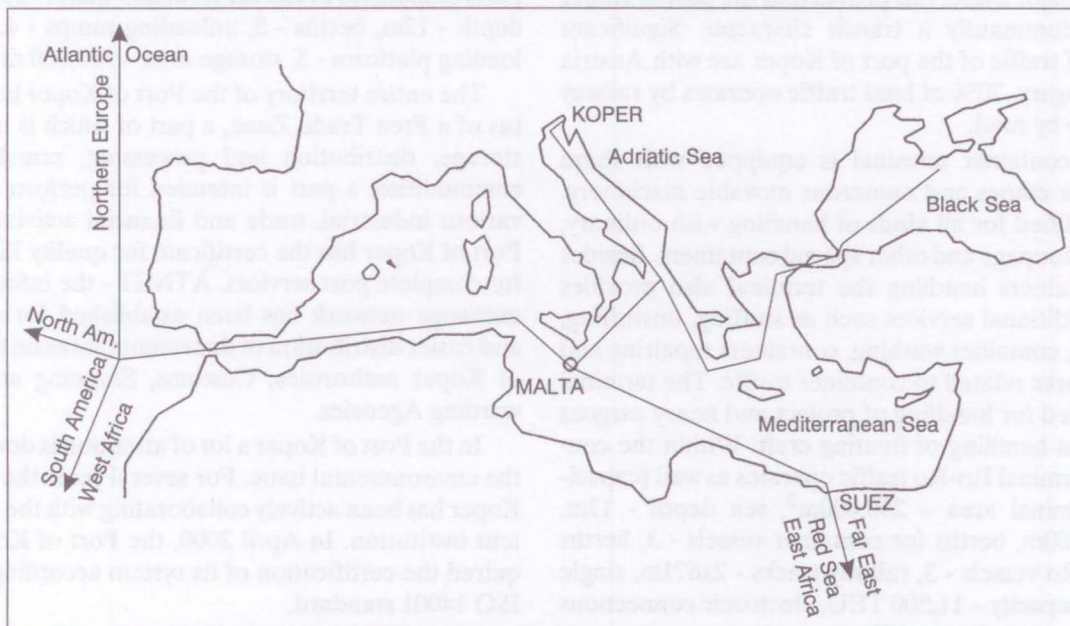


Figure 5 - Maritime connections of the Port of Koper

Source: Port of Koper

Today the Port of Koper performs most of its services for hinterland countries such as Austria, Hungary, the Czech Republic, Slovakia, Poland, southern Germany, Italy, Switzerland, Croatia, Bosnia and Herzegovina, Yugoslavia and also for Macedonia, Albania, Bulgaria, Ukraine and Russia.

From Koper there are regular and reliable shipping container lines to all the major world ports. Land transport from Koper by road and by railway to the main industrial centres in Central Europe is approximately 500 km shorter than from North European ports.

The entire area of the Port of Koper including the development area extends over 1,600 hectares. The Koper port is designed for the handling of various types of goods such as general cargo (coffee, cacao, metals & non-metals, iron, paper, wooden products, fruits and light-perishable goods, etc.) livestock, containers, cars & Ro-Ro, timber, dry bulks, ores & coal, liquid cargo, alumina, cereals. The basic activities are performed by eleven specialised and highly efficient terminals, i. e.: Container and Ro-Ro Terminal, Car Terminal, General Cargo Terminal, Livestock Terminal, Fruit Terminal, Timber Terminal, Silo Terminal, Bulk Terminal, Alumina Terminal, Terminal for Soya, fertilizers and other bulk cargoes, Liquid cargoes Terminal, Multi-purpose Terminal. All terminals are located alongside the berths and are equipped with up-to-date loading, transport and storing technology. At each terminal special warehouse facilities are available: silo, shore-tanks, air-conditioned and deep-freezing storage areas. All of them are directly linked with railway.

Exports and imports through the Port of Koper represent a minor share, whereas the traffic in transit has the major share: this proves that the port of Koper has predominantly a transit character. Significant shares of traffic of the port of Koper are with Austria and Hungary. 70% of land traffic operates by railway and 30% by road.

The container terminal is equipped with shore container cranes and numerous movable machinery. It is qualified for all kinds of handling with ordinary, reefer, groupage and other special containers. Besides the containers handling the terminal also provides other additional services such as stuffing, unstuffing, cleaning, container washing, containers repairing and other works related to container traffic. The terminal is qualified for handling of project and heavy cargoes as well as handling of floating craft. Within the container terminal Ro-Ro traffic operates as well (capacities: terminal area – 250,000m<sup>2</sup>, sea depth - 12m, quays- 500m, berths for container vessels - 3, berths for Ro-Ro vessels - 3, railway tracks - 2x671m, single storing capacity – 11,500 TEU, electronic connections for reefer containers - 175).

In addition to investments in technological modernisation, in connection with further development of

container services, the preparations for the construction of a new container terminal on Pier III will be accelerated.

The port of Koper will be profiled as a feeder port. It looks like Europe will need large container ports (intercontinental hub-ports) for intercontinental transports, and minor ports for an environmentally friendly intra-European transport.

The transport of vehicles is increasing from year to year (ca. 300,000 in 1999). The increase in the volume of car cargo was matched by an increase in warehouse capacities, which has already exceeded 566,000 m<sup>2</sup> and currently allows for the warehousing of 37,000 vehicles. In 1999, the open warehouse areas were complemented with a parking house for 3,350 vehicles.

The Port of Koper is qualified for import and export car-handling operations. Besides quick and quality car handling performed by a skilled group of drivers, the Car terminal offers the car storage at controlled asphalted and fenced areas illuminated at night. The high level of security is guaranteed 24 hours per day by an integrated video-system. The operational work is supported by a fully computerised system. The storage area is linked by two railway tracks with wagon ramps.

Modern workshop is properly equipped for performance of deconservation and conservation of vehicles, PDI service, optional equipment of vehicles upon the customers' request, various repairing - mechanical, paintwork car-body repairs - of damage incurred during the transport. Close by the terminal roofed warehouses are located, offering the possibility of spare parts storage, disassembling and packing of car parts (capacities of the car terminal: quays - 500m, sea depth - 12m, berths - 5, unloading ramps - 4, wagon loading platform - 5, storage area – 500,000 m<sup>2</sup>.)

The entire territory of the Port of Koper has a status of a Free Trade Zone, a part of which is used for storage, distribution and processing, remaking of commodities, a part is intended for performance of various industrial, trade and financial activities. The Port of Koper has the certificate for quality ISO 9002 for complete port services. ATNET - the information exchange network has been established for support and easier distribution of documents between the Port of Koper authorities, Customs, Shipping and Forwarding Agencies.

In the Port of Koper a lot of attention is devoted to the environmental issue. For several years the Port of Koper has been actively collaborating with the competent institution. In April 2000, the Port of Koper acquired the certification of its system according to the ISO 14001 standard.

On the basis of survey results, the management of the company decided to initiate a project for establishing a system of human resources development. A spe-

cial place in the Port of Koper is dedicated to the development of programmes to further innovation: a substantial rise in innovation can be attributed to that policy. The innovations concerned have contributed to enhancement of productivity, improvement in the quality of services, or savings in material or time, safety at work improvement, or ecological friendliness, respectively.

The Port of Koper co-operates with the following educational institutions and provides assistance, as follows:

- with the Faculty of Economics and Business Administration in Ljubljana (Protocol on co-operation),
- the Port is the founding member of the Studies and Development Fund with the Faculty of Economics in Ljubljana,
- co-financing of various studies and researches,
- organising of professional visits to the Port of Koper,
- assistance in the preparation of study projects, diploma theses and seminars.

### 3.2. Prospects of the Port of Koper

The year 2003 is going to be a pretentious year for business, especially due to the uncertain international economic situation and the events in the Middle and the Near East. Nevertheless, the Port of Koper plans to increase the quantity of handled cargo to 10 millions tons. However, to acquire new cargo, the mere installation and modernisation of the port infrastructure and improvement in the quality of services may not be sufficient.

Today, the Port of Koper must direct its efforts more to the hinterland and to the foreland to initiate and organise various participants. Operational efficiency of the transport-logistics cycle affects all actors involved: linear companies port authorities, stevedores, forwarders, agents, as well as hinterland transportation modes.

Therefore, the management of the Port of Koper as the key company of the STLC believe that STLC should play an important role in introducing organisational innovations, promoting the Slovenian transport route, assuring the possibility of introducing an increase in the quality of services offered by the members and in respecting the environmental safeguard regulation as well as transmission of knowledge.

## 4. INITIAL PRESENTATIONS, EXPERIENCES AND RESULTS

The geographic location of the Port of Koper represents an important advantage in the trade between Eastern Mediterranean, Middle East, Far East and Central-Eastern Europe.

### 4.1. Slovene Transport Logistic Cluster in Israel

Approximately 500,000 tons of different cargoes, equably divided in both directions are handled in Luka Koper for the countries of Eastern Mediterranean yearly. For Luka Koper goods from Israel market represent a big potential in import direction (fruit and vegetables, chemicals, minerals), as well as in export direction (raw materials for domestic industry: iron and steel, cellulose and paper, timber, goods in containers and cars). Regular line services provided by international ship-owners ZIM and Maersk, linking Israel and Koper, allow the Port of Koper to be an important spot on the transport route linking Middle East with Central and Eastern Europe.

In November, 2001 a delegation of 16 representatives from Luka Koper, Slovene Railways, Ministry for Transport and Communications and some members of Slovene Transport Logistic Cluster (STLC) - Adriakombi, Censped, Intereutropa, Intertrans, Transmar and Viator-Vektor took part in a joint presentation conference entitled "Slovene Transport Route - Southern European Alternative" in Israel. This was the first presentation of the Slovene Transport Cluster in a foreign country. Israeli transport minister attended the opening of the Conference for which considerable interest was shown, with more than 80 registrations of the Israeli companies (forwarding agents, agents, port representatives and representatives of export companies). The purpose of the joint presentation in Israel was particularly the acquisition of new potential cargoes, at present directed through Northern European ports to Central and Eastern Europe, conclusion of business with new partners and strengthening of existing sea connection. During the Conference the members of the GIZ TLC explained the details related to inland and maritime connections, to custom procedures and the quality of services, which are granted on the route via Koper.

Short after organising the business Conference in Tel Aviv the Business Interest Association Transport Logistic Cluster (GIZ TLC) arranged another business meeting with the Israeli delegation (26 members) in Koper. Both sides agreed that the good relationships must continue especially as the Slovenia transport route represents an important gateway for the Israeli goods bound for Central and East European markets

### 4.2. Slovene Transport Logistic Cluster in Turkey

On 24<sup>th</sup> September 2002, 10 Slovenian companies, members of the Transport Logistic Cluster (TLC) presented in Turkey some business opportunities offered

by the Slovenian transport route. The companies Adriakombi, Censped, Fersped, Intereuropa, Intertrans, Luka Koper, Pacorini, Slovenske železnice, Transmar and Viator & Vektor, organised in Istanbul together with the biggest Turkish associations of forwarders, ship-owners, road and railway carriers a business Conference for the Turkish potential partners. Beside a great number of businessmen, there were both the Slovenian Ambassador in Turkey, the Turkish Ambassador in Slovenia, who are at the same time presidents of the Slovenian-Turkish Business Council, there was a representative from the Chamber of Commerce and Industry of Slovenia, the representative of the Ministry of Economy and one of the Ministry of Transport of the Republic of Slovenia.

The Slovenian companies presented their activities jointly. The emphasis was not on each singular company, but on the complete offer (service): road, railway, maritime and intermodal transport, port operations as well as forwarding services.

#### 4.3. Port of Koper - Hyundai's gateway to Europe

In the near future the STLC should present itself in Korea. For the Port of Koper the distribution of cars is important. The first vessel with cars entered the port of Koper in April 1990. From that time the vessels have been arriving regularly and they brought to the Port of Koper in total more than 150.000 Hyundai cars. Vessels built in Hyundai's shipbuilding yard in Ulsan, specialised in the transportation of cars can accept around 4,000 and 6,000 cars. The voyage from Ulsan to Koper takes only 25 days.

For the year 2003 the Hyundai Motor Company foresees bigger use of the port of Koper as an increase in the production of their factory based in Turkey is planned. At present, two of the models produced in Turkey are being distributed on the European market exclusively via port of Koper because this represents the fastest and cheapest transport route. Koper is 2000 nautical miles nearer if compared with the maritime routes to the North European ports and the fact is that all the biggest Central and Eastern European markets can be reached in 24 hours. There are also the possibilities to further strengthen the mutual cooperation - foremost on the field of the distribution of containerised goods for the Central and Eastern Europe and also export of containerised goods in the opposite way.

## 5. CONCLUSION

To what extent the Port of Koper will exploit its good geographic transport position will depend on a cluster of circumstances. The importance will also be

laid on how the Port of Koper will present itself and what it will offer to Europe and the rest of the world. The Port of Koper could become the main gateway primarily for the countries of Eastern and Central Europe.

Consequently, the Port of Koper management has a clear strategy of development, and the company's cooperation with the STLC represents the key for the realisation of that strategy. Conferences organized by the STLC, had an important role and strengthened the relationship with the existing and potential customers. The planned presentation of the STLC on important markets such as those of China, Japan, and Korea are future steps to be made; the cluster's growth and its links with other clusters are to be brought into line with the common strategy. Moreover, the cluster is then to join the international networks.

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### POVZETEK

*Danes se države Centralne in Vzhodne Evrope (CEE) razvijajo v hitro rastoči in obetaven del Evrope. Vizija vodstva Luke Koper je postati najpomembnejši logistični center za te države. V prihodnosti se bo severno-jadranska regija srečala z izzivom vse večje prisotnosti azijsko-pacifiških gospodarstev na evropskem kontinentu in posebno v CEE državah. Za blagovne tokove iz tega vira je severni Jadran glede na geo-transportni položaj najugodnejša pot.*

*To je tudi razlog, da se je Luka Koper kot ključno podjetje priključila pilotnemu projektu STLG (slovenskemu transportno logističnemu grozdu). Poglavitni razlog obstoja STLG je predstaviti slovensko transportno pot skozi Luko Koper.*

*Članek ima namen prikazati: 1) stanje in razvoj slovenskega transportno logističnega grozda, 2) potencialne koristi grozda za Luko Koper, 3) začetne predstavitve, izkušnje in rezultate.*

### KLJUČNE BESEDE

*Transportno logistični grozd, Slovenija, slovenska transportna pot, centralna in vzhodna evropska tržišča, Luka Koper*

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