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Third Annual Stakeholders' Conference

30th November 2017, Brussels

Maritime logistics chains and the “perfect storm”



How can EU companies be the “winners” in the new world ?

Boris Wenzel

Managing Director **TERMINAL LINK**

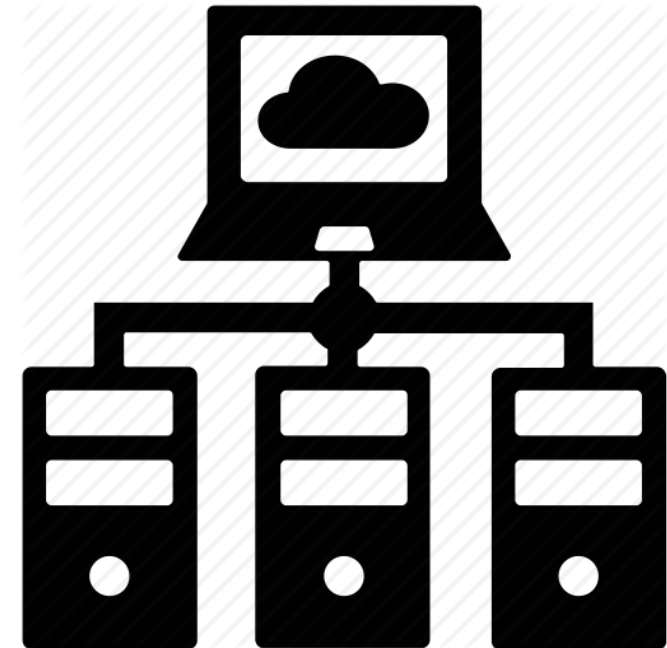
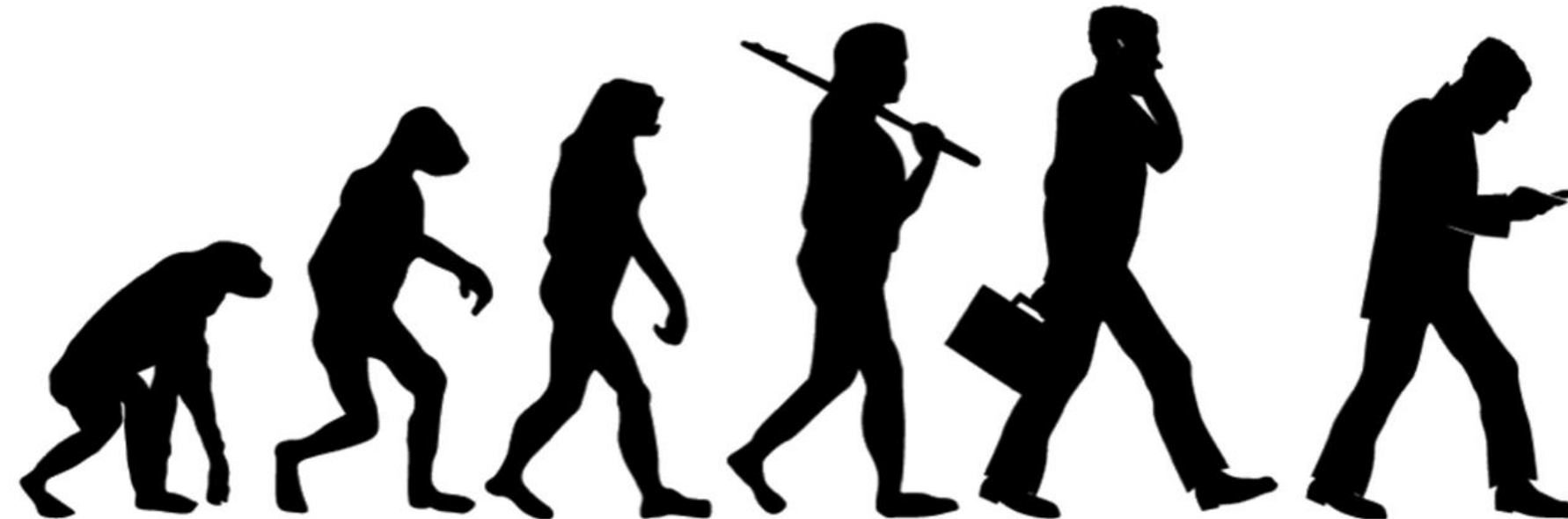
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TERMINAL LINK
A joint venture of CMA CGM and CMPORT

The evolution theory

| | Year: Before 1900s | 1900-2000 | 2000-2020 | 2020-2040 |
|-----------------|--------------------|-------------------------|--------------------------|----------------------------------|
| Equipment: | Manual | Machining | Automated-PLC | Autonomus-BigData-IoT-Cloud |
| Intelligence: | First in First Out | Logic rules (order by) | Algorithms 2-3 Variables | Machine Learning 4-200 Variables |
| Goal: | Move the cargo | Don't lose-stop process | Optimize Local Cost | Optimize global cost |
| ManPower: | 100% | 30% | 15% | 5% |
| Intelligence: | 5% | 10% | 30% | 100% |
| System Agility: | 100% | 60% | 30% | 80% |



New **bussiness** models?

TODAY

Left Side Clients:

Oligopoly 4-5
Mid term contracts
12-24h exchange information

Right Side Clients:

Atomized
On demand
0-3h exchange information

Suppliers:

1 Main equipment + 1 Main Software +
lots of smalls.

TOMORROW

Left Side Clients:

Oligopoly 2-3
Long term contracts
24-48h exchange information

Right Side Clients:

Atomized
On demand
3-24h exchange information

Suppliers:

1 Main equipment + Software + lots of
smalls.

DAY AFTER TOMORROW

Left Side Clients:

Monopoly
Long term contracts
Live Real time exchange ALL information

Right Side Clients:

Oligopoly + Atomized
Online Contracts
Live Real time exchange information

Suppliers:

Renting-Leasing Autonomous equipment +
lots of smalls.

Software e-intelligence inhouse.

Assets vs e-companies companies?

The Autonomous
Equipment
Company

The e-logistic
Company

Civil infrastructure
Porth Authority

Old Jobs vs **New Jobs**: the real problem

Who are **WE**?



Who are **WE** going to be?



Who should **WE** be?

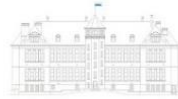




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Thank YOU!



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