



BNP PARIBAS | **CORPORATE & INVESTMENT BANKING**



The Big Industry Debate

Sponsored by BNP Paribas
Facilitated by BNP Paribas and University of Antwerp



9 June 2011

10 Themes for 10 round tables for the Big Industry Debate

Theme 1 | How will the next generation of ships change the competitive landscape & operational demands in ports and terminals?

Theme 2 | Sustainability & energy efficiency – the next steps

Theme 3 | New operational priorities for container terminals – challenges & responses

Theme 4 | Port competitiveness: what are the critical parameters for success today?

Theme 5 | Port-hinterland logistics integration & multimodality

Theme 6 | Shipping line strategy & its impact on the supply chain.....

Theme 7 | Measure to manage – benchmarks, metrics & KPIs.....

Theme 8 | Finance & valuation for ports & terminals – new approaches for the new challenges

Theme 9 | Partnership & collaboration – how to make it work in practice?..

Theme 10 | Information in the container supply chain: how will cloud computing, mobile computing & other new technologies make a difference?

Moderated by

Christa Sys (UoA)

Valérie Du Bois (BNPP Fortis)

Shane Waldron (BNPP)

Raimonds Aronietis (UoA)

Marjan Beelen (UoA)

Jorge Madorell (BNPP)

Thierry Vanelslander

Michel Jenné (BNPP Fortis)

Roel Gevaers (UoA)

Thomas Vanoutrive (UoA)



Theme 1 | How will the next generation of ships change the competitive landscape & operational demands in ports and terminals?



Christa Sys is director of the Research Centre on Commodity Flows hosted by the Department of Transport and Regional Economics. She jointly graduated as a doctor in Applied Economics at the Ghent University and the University of Antwerp (December 2010). Her doctoral research dealt with the competitive conditions, the concentration and the market structure of the container liner shipping industry. She teaches at the University College Ghent, Faculty of Applied Business (Member of Ghent University Association). Her educational activities focus on the different modes of transport (road-, rail-, air transport, inland transportation and maritime transport).

1. Will the next generation of ships change the competitive landscape? If so, how?
2. YES, the driver will be economies of scale
 - Next generation of ships: what? Even larger, up to 20,250 TEUs
 - Is the landscape competitive?
 - Depends how you define competition
 - In combination with reliability, if they succeed, and yes the landscape is competitive
 - Environmental issue?

3.



Theme 2 | Sustainability & energy efficiency – the next steps



Valérie Du Bois (1968) graduated as Commercial Engineer from Ichech in 1994, and is currently, coordinating the Ports Practice within BNPP. With 15 years of experience in the banking world, Valérie was, within Fortis, Head of the Ports and Logistics division. Her previous responsibilities include Head of Credit Analyst Team, Project Finance Manager, and Export Finance Manager.

1. First need to agree on a definition of sustainability and a way to measure it
2. Initiative to be taken by the port authorities to impose a standard
3. Follow-up by big players to show the example



Theme 3 | New operational priorities for container terminals – challenges & responses



Shane Waldron is based in Singapore at BNP Paribas as Director Ports Practice, since August 2010, following the Fortis acquisition. For the prior 3 years Shane was the Head of Ports and Logistics Asia Pacific for Fortis Bank based in Singapore. Before moving to Singapore and joining Fortis Bank, Shane came from the industry having spent 13 years working for P&O and then DP World. Originally from Australia, Shane has lived in the UK, Dubai and Singapore but worked in all continents either raising financing from the borrowers and more recently lenders side for container and bulk terminal developments.

1. Maintaining revenues- Shipping lines imposing downward pressure on tariff but expect reliability/ productivity => offer additional services and charge per TEU
2. Managing unions strength/ labour force vs managing costs (union strength or skill based)
3. Reliability and consistency of service. Customers expect full service and budget price (including rail connexions, trucking etc...)



Theme 4 | Port competitiveness: what are the critical parameters for success today?



Raimonds Aronietis (1980) is a researcher in the Department of Transport and Regional Economics at the University of Antwerp. His work experience includes 5 years of Transport market analyst work in Road Transport Administration of Latvia. He graduated from Riga Technical University masters programme in logistics entrepreneurship and transport economy in 2004. He obtained his Bachelors degree in Ventspils University College in 2002 with specializations in logistics and finance management. His current research interests include investigation of infrastructure, pricing and regulatory measures as a solution to road congestion problems on port hinterland links.



Theme 5 | Port-hinterland logistics integration & multimodality



Marjan Beelen (°1981) graduated as a transport economist in 2004 at the University of Antwerp. Since then she works as a research assistant at the Department of Transport and Regional Economics. First she did research on home-work commuting for the Belgian Science Policy. Currently she works as a researcher for the Policy Research Centre on Commodity Flows, where her research focusses on freight gateways.

1. Electronic data interchange is crucial in logistics integration and multimodality
2. Ports have an important role in setting up electronic communication systems (independent player,) eg Port of Antwerp
3. Port as a facilitator (bringing together players and volumes) but also a commercial role (eg inland terminals)



Theme 6 | Shipping line strategy & its impact on the supply chain



Jorge Madorell Blasco is director of Ports Practice Euromed Latam.

Jorge has been involved during more than 10 years in the banking industry covering Ports Sector in entities such BBVA, Fortis Bank and BNP Paribas.

Jorge is licensed in Law with a Master Degree in Ports Management from ICADE Business School and Master Degree in Business Internationalization from the Institute of International Economics of the University of Valencia.

Jorge has been involved in Ports Finance project in Spain, Magreb and Latin America.



Theme 7 | Measure to manage – benchmarks, metrics & KPIs



Thierry Vanellander (1975) graduated as a doctor in Applied Economics at the University of Antwerp in 2005. He currently is holder of the BNP Paribas Fortis chair on transport, logistics and ports. Until halfway 2009, he was director of the Research Centre on Commodity Flows hosted by the Department of Transport and Regional Economics, to which he still is a promotor now. In his academic career, he took off as a researcher at the University of Antwerp for several research projects in the field of transport and regional economics. He is currently course co-ordinator for the courses Bachelor Proof, Industry Location, Advanced Transport Economics and Maritime Technology. He is also involved in the Marie Curie and Asia Link training programmes at the Department. His research focuses on business economics in the port and maritime sector, and in land and air transport and logistics. His Ph.D dealt with co-operation and competition in sea-port container handling.



Theme 8 | Finance & valuation for ports & terminals – new approaches for the new challenges



Michel Jenné (1952) holds a Master Degree of Commercial Engineer of the University of Antwerp. He joined one of the composing banks of Fortis Bank 33 years ago and has had several responsibilities in commercial management functions in banking medium-sized enterprises and corporates. For the past 20 years he has been primarily involved with the maritime industry : at first focused on international ship finance, later shifting to ports and logistics. In this function Mr. Jenné has been amongst others instrumental in structuring the large port projects in the port of Antwerp. He was at the basis of the creation of the Global Ports & Logistics sector within Fortis, and as such involved in the arranging of debt finance for ports in various parts of the world.



Theme 9 | Partnership & collaboration – how to make it work in practice



Roel Gevaers (Bornem, °1985) obtained his master's degree as a Transport Economist at the Faculty of Applied Economics (University of Antwerp) in July 2007. Since July 15th, 2007 he works as a Junior Scientific Ph.D. student at the new Policy Research Centre on Commodity Flows (Steunpunt Goederenstromen) of the Department Transport and Regional Economics (Faculty of Applied Economics - University of Antwerp). His research focuses on innovations and innovation policies in logistics and transportation.



Theme 10 | Information in the container supply chain: how will cloud computing, mobile computing & other new technologies make a difference?



Thomas Vanoutrive is researcher at the University of Antwerp, Faculty of Applied Economics, Department of Transport and Regional Economics. He holds a joint Ph.D. in Applied Economics (University of Antwerp) and Geography (Ghent University). He has a background in Geography (2002) and Spatial Planning (2003). Between 2003-2008 he worked at the Antwerp Port Authority on different topics in the field of spatial planning and the environment. His research focuses on ports, transport economics and geography, commuting, mobility management and spatial modelling techniques

1. Thanks to standardisation and ICT- terminal operators can react faster and more flexible to changes (ineg time of arrival)*
2. Thanks to standardisation and easy accessible ICT- APPS, it is easier to enter the market, however, TOC's that offer good applications have a significant advantage.
3. Good apps are easily accessible (info sharing) and mobile (iphone) and provide info also on KPIs
4. In negotiations on terminal and port selections good ICT apps provide on the spot info on KPIs (crane productivity...°
5. -

