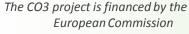


Horizontal Collaboration: A New Logistics Paradigm



World Forum Lille, October 25th 2013

Sven Verstrepen – TRI-VIZOR N.V.













- World's First Cross Supply Chain Orchestrator[™]
- Since November 2008
- Neutral and independent
- Spin-off of the University of Antwerp
- Strategic Advisory Board with captains of industry





SEVENTH FRAMEWORK

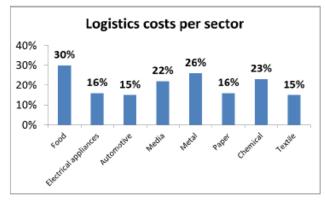
Member of the "CO3 Consortium"





Why should you care about Logistics?

- Logistics industry in Europe → 14% of GDP¹. Six countries out of the global top-10 logistic performers are from the EU in 2012²
- Transportation is responsible for around a quarter of EU greenhouse gas emissions³
- On average, logistics costs account for 10-15% of the final cost of the finished product⁴.



High potential **contribution** to **European competitiveness and sustainability targets** (Cost, CO₂ and energy savings)

¹ COM(2007) 607 final. "Freight Transport Logistics Action Plan" European Commission, Brussels, 18.10.2007

² Worldbank.org "Connecting to Compete 2012" http://siteresources.worldbank.org/TRADE/Resources/239070-1336654966193/LPI_2012_final.pdf.

- ³ http://ec.europa.eu/clima/policies/transport/index_en.htm
- ⁴ European Logistics Association (2007)

The CO3 project is financed by the European Commission

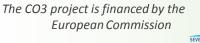




World Economic Forum Supply Chain Study 2009

- 24% of freight vehicles in the EU are running empty
- = Average loading of the rest is 57%
- = Overall efficiency: **43%** ③
- Flow imbalance can only explain half of this loss

How long can this continue?









How to react?

- Regulation
- Innovation & Technology
- ≡ Multimodality

E Horizontal collaboration

- **Requires** = New type of co-operations (co-opetition)
 - New logistics actors: trustees, orchestrators
 - New type of multilateral contracts
 - ≡ Trust
 - Know-how
 - ICT and technology





A 10% to 30% fficiency in EU logistics sector = € 100 – 300 billion cost relief for European industry

Make European industry resilient by a true "people, planet, profit" oriented logistics and supply chain sector.

A sector that is economically, environmental and socially sustainable contributing to both industry competitiveness and the EU policy targets



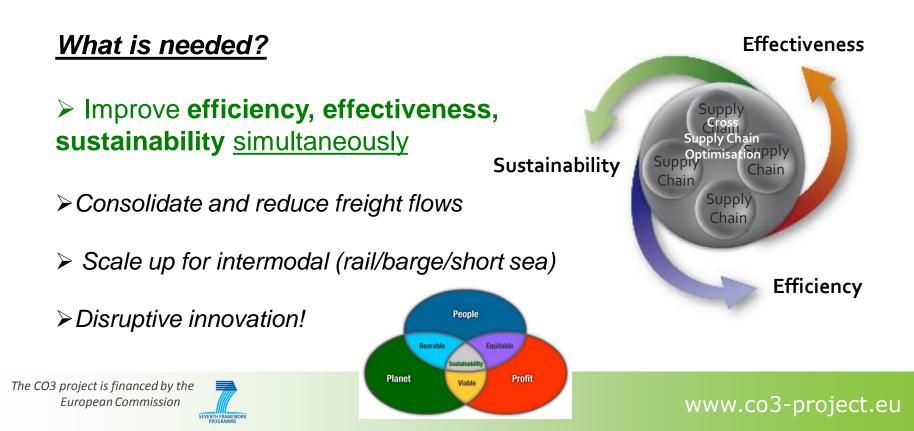




Future EU Strategy

EU Transport Policy Vision (EC 2011):

- Reduce Europe's dependence on imported oil
- Cut carbon emissions in transport by 60% by 2050
- ➤ Modal shift: 30% off road by 2030 50 % by 2050
- Multi-modal: European corridor network (low carbon/green)





The new logistics paradigm



Peter Drucker: Cooperation, Coordination and Communication (1993)

Welcome to the age of « co-opetition » !

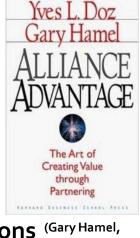
- Vertical collaboration (1980- ...):
 - **E** Between subsequent actors in the *same supply chain*
 - E Between suppliers, manufacturers and customers
 - ≡ EOQ, outsourcing, VMI
 - E Driven by ICT (extended enterprise)



Michael Porter: Clusters and the New Economics of Competition (1998)



- ≡ Horizontal collaboration (2006 -...):
 - **E** Between companies in the *same market*
 - Alliances, partnerships, clusters, network organisations (Gary Hame 1998)
 - E Collaborate in some markets, compete in others
 - ≡ "New frontier" or "paradigm shift"





WWW.CO

Co-loading between JSP – Hammerwerk Net cost reduction -10% ; carbon footprint -30%





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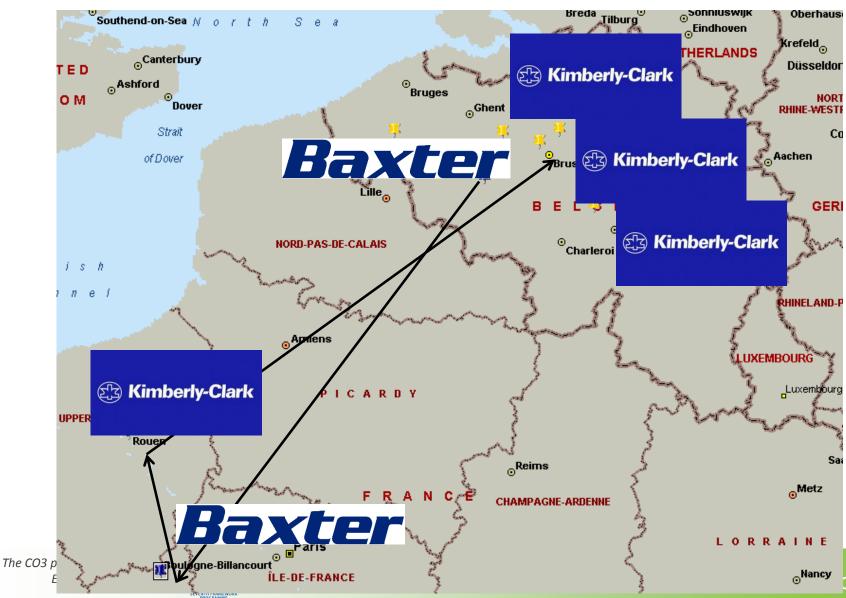








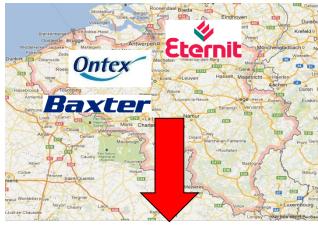
Healthcare – FMCG roundtrips -13% cost reduction



ct.eu



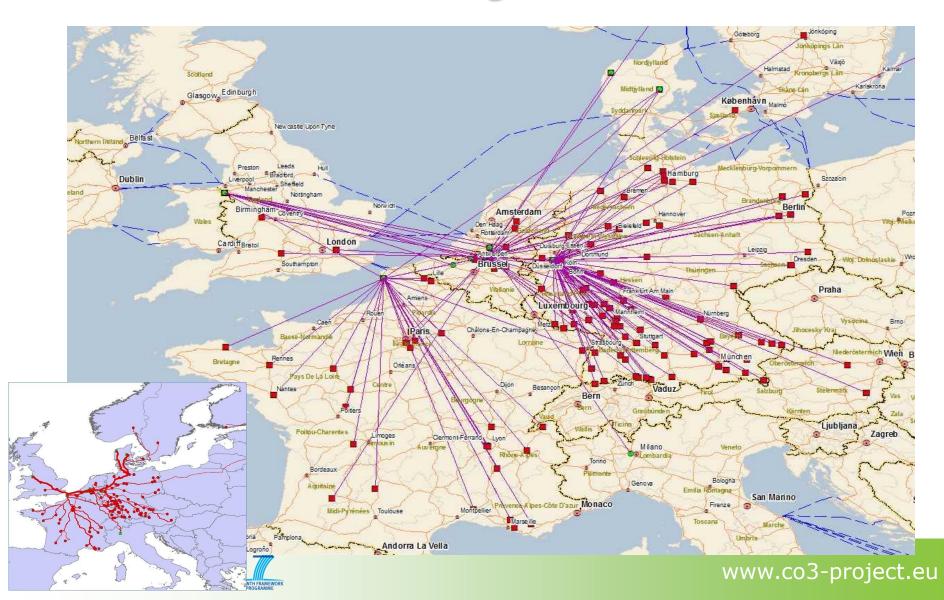
North – South Closed Loops -30% carbon footprint reduction







Critical mass: creating a Critical mass: creating a Universal" freight flow database





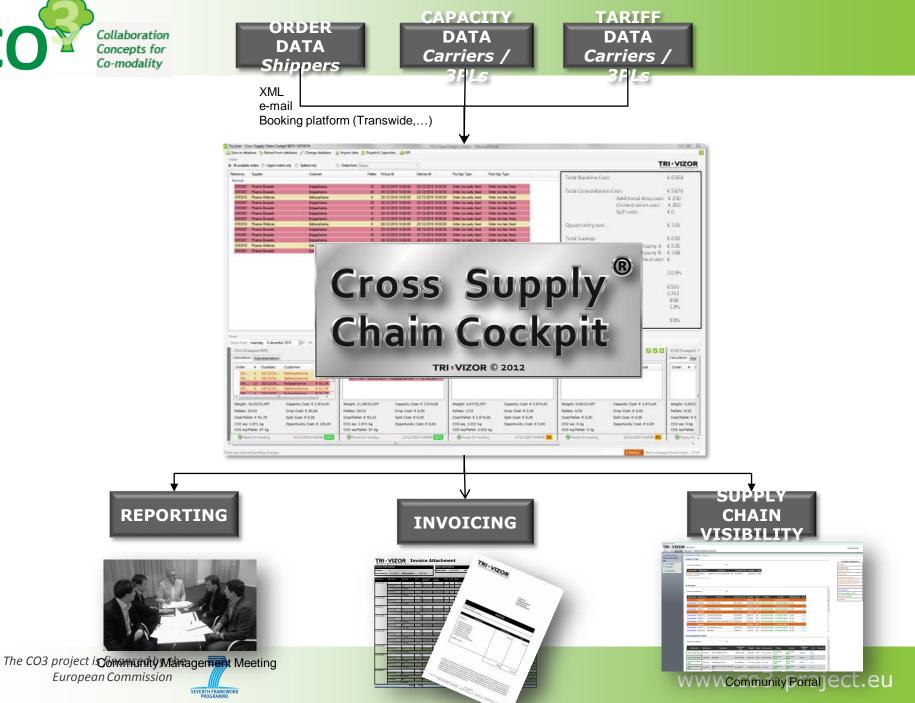
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- The old logistics paradigm is no longer working
- = Horizontal collaboration is the "next big thing"
- EU law permits competitors to work together
- But... pay attention to legal aspects (anti-trust)
- E Neutral facilitator/trustee is essential
- E Big data analysis, methodology and ICT are key
- Start small, then scale up







Thank you QUESTIONS ?

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The CO3 project is financed by the European Commission

