



Ports & Logistics Advisory



Ports & Logistics Advisory, SL

We believe ports can:



provide business opportunities



contribute to sustainable supply chains



be innovation hotspots



enable trade flows



create high productive employment



develop into vital economic clusters

1. About Ports & Logistics Advisory, S.L.

About PLA (I): Mission and Approach



- Ports & Logistics Advisory (PLA) is an advisory company registered in Málaga, Spain.
- Dr. P.W. de Langen started PLA in 2013, after an extensive track record in industry focused research and strategic advisory.
- The PLA mission: to contribute to more efficient and sustainable ports & logistics chains, by providing, inspiring and cutting-edge training, advice and analysis.
- PLA strongly believes in partnerships with customers. PLA aims to make high impact contributions to organisations in the port industry by sharing experiences, inspiring decision makers and helping organisations to realise complex strategic projects.

About PLA (II): Consultants



- Dr. Peter de Langen is the owner and principal consultant of PLA.
 - Peter also holds a part-time position as professor Cargo Transport & Logistics, at Eindhoven University of Technology, since 2009.
 - From 2007 to 2013, Peter worked at Port of Rotterdam Authority, department Corporate Strategy as senior advisor.
- Peter is co-director of the knowledge dissemination platform www.porteconomics.eu, co-organiser of conferences and training events and regular speaker at industry conferences on ports and shipping.
 - Peter is a thought leader in the ports industry, and writes a monthly column in Port Strategy and articles.
 - Peter has worked in the ports industry in over 30 countries, including Canada, US, Brazil, Panama, Netherlands, Belgium, Spain, Portugal, South Africa, Ghana, Kenya, Oman, Saudi Arabia, China and Korea.



- Jordi Caballé is an economist and a consultant of PLA.
 - Jordi is investigating green policies, port concessions, and port strategies as PhD project in Economics and Business at University of Málaga.
- From 2005 to 2009, Jordi worked as an Auditor with a consulting company based in Barcelona, Spain.
 - From 2009 to 2013, Jordi worked as a finance advisor in an international trading company, also in Barcelona.
 - Jordi Caballé has a solid expertise in complex financial projects. His expertise in Ports and Logistics was developed in PLA projects (Port concession training course, European port policy analysis, maritime connectivity indicators).



2. Services

Services: Teach & Inspire, advice & analyse

Teach & inspire

PLA strongly believes in the talent development and aims to transfer knowledge and inspire talented people to build a better port industry, by providing education & training for universities and in-company training.

PLA regularly contributes to post experience educational programs (masters), a.o. at Erasmus University Rotterdam. PLA develops executive education in cooperation with members from www.porteconomics.eu.

PLA has developed specific course material for courses on ports, including management cases and readers for specific topics. These assets help in delivering well evaluated education.

PLA provides in house executive education for professionals in the port industry, amongst others for Port of Rotterdam (2010-2015) and the port authorities in West and Central Africa.

Advice

PLA helps companies in ports & logistics through (boardroom) advisory services.

PLA provides well-prepared workshops and (management) team meetings, for instance in relation to a long term port development plan, goals and performance indicators, commercial strategies and investment projects.

PLA shares a strong set of best practices and lessons learned, developed in past projects, including first hand experience of strategy-making and the company transition of Port of Rotterdam Authority, a benchmark for many port authorities.

PLA brings fresh ideas to companies and public agencies in the port industry, a.o. about business opportunities, new roles, disruptive trends and implications for policies and strategies.

PLA makes high impact contributions with relatively small inputs (in terms of resources), by working closely with customers.

Analyse

Huge investment decisions in ports and logistics require careful analysis, of market dynamics, trends and developments and growth prospects. PLA –often in partnership- can provide rigorous analysis that assists decision makers in public and private sectors.

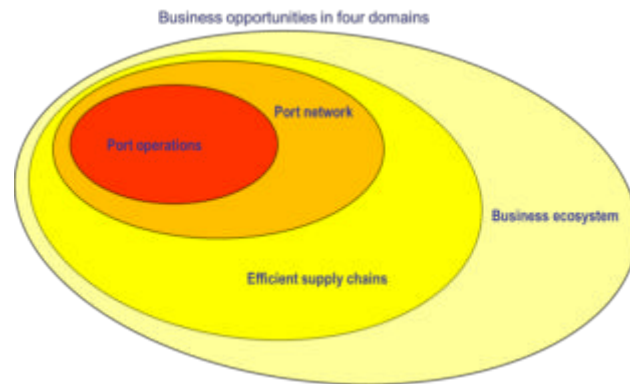
PLA provides ‘outsider opinion’ on important issues such as approaches to granting concessions, forecasts, port development plans, corporate plans and so on.

PLA helps structuring studies. Organisations benefit from advice on how to analyze complex issues such as long term forecasts, industry trends, market dynamics and so on. PLA assists in developing a clear analytical structure.



3. Expertise

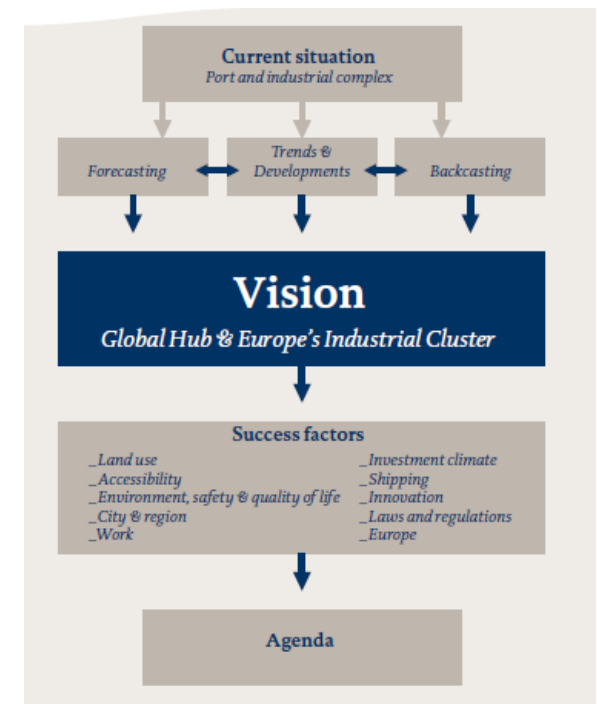
Expertise (I): Entrepreneurial Port Development



- Many port authorities gradually transform to business case driven port development companies.
 - The main elements of this transition are: from publicly funded to business case driven, from reactive to active in business development and from a focus on infrastructure in 'the port territory' to a focus on synergies in clusters and networks.
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- Central in this transformation is the ability to identify business opportunities and translate these into concept and projects with a sound business case.
 - In most cases Port Authorities do (and should) stick to the landlord model, i.e. they leave operations to other companies in the port business ecosystem.
 - Relevant PLA experience includes projects at Port of Rotterdam as well as port the port of New York & New Jersey.

Expertise (II): Port Vision

- Stakeholders are increasingly demanding a comprehensive vision of port development.
- PLA's experience has led to a number of key insights and lessons learned, for instance on
 - the relevance of trends analysis with special attention for *disruptive* trends
 - the need for an inclusive process with involvement of all relevant stakeholders, not the least the business community.
 - the success factors required to achieve the vision, including for instance education, hinterland access and cluster synergies.
 - the challenge to develop a vision that allows for sufficient adaption to changing (market environments).
- This experience can be useful for ports that develop such port development plans. A central challenge often is to move from 'a list of infrastructure needs' to a widely embraced vision.
- Relevant PLA experience includes the port vision project for Port of Rotterdam Authority (2010-2012, see www.portcompass2030.nl), the Brazilian Federal Government (2010-2012), the Port Authority of New York & New Jersey (2012-2013), the Dutch port of Moerdijk (2013-2014) and the Dutch port Zeeland Seaports (2014-2015).



Expertise (III): Strategies and performance indicators for port authorities and ports

- We have applied the strategy map as tool for developing goals and performance indicators, both for port authorities and for ports. This tool can be very useful for workshops of senior managers of port authorities to define and prioritize goals of their organization and select relevant performance indicators, both for the port complex and for the port authority. Some highly relevant indicators that PLA has helped to co-developed include:
 - Connectivity indicators, more specifically maritime connectivity, intermodal connectivity and RoRo connectivity.
 - Indicators of the vitality of a port complex, more specifically investments, new start-ups, an *innovation regime*.
- PLA strongly believes in open strategy formulation processes. Strategies are often developed by a small group, strategy implementation often fails because of lack of commitment in the whole organization. PLA has a vast experience in preparing and moderating interactive strategy sessions.
- Relevant PLA experience includes projects for Port of Rotterdam Authority (2009-2013 -as PoR employee), an European Port Performance project (2010-2012, see www.espo.be/pprism), the ongoing PORTOPIA project (see www.portopia.eu) and a project on performance indicators for the Brazilian ports.

Expertise (IV): Long term cargo forecasting

- Forecasting cargo flows is indispensable in the port / logistics industry.
- PLA has developed first hand knowledge about forecasting, and learned the following insights:
 - Use an approach that combines models with industry analysis.
 - Pay attention to potential disruptive events –the past is never a reliable basis for projecting the future.
 - Be careful for so called ‘GDP-multiplier models’, deeper analysis is required.
- PLA strongly believes in co-creating forecasts with relevant stakeholders as forecasting models cannot capture (disruptive) industry trends.
- The PLA experience includes projects for Rotterdam (2010-2012), the Brazilian Federal government (2012) and the Port of Moerdijk (2013-2014).

Expertise (V): Cooperation between neighbouring ports

- More cooperation between ports located in proximity to each other may be desirable from a societal perspective as well as a business perspective.
- This topic is center stage in a book on Ports in Proximity, co-edited and written by Peter de Langen. Relevant lessons learned of previous experience includes:
 - Often, considerable potential synergies exist (operational, commercial, or through a better joint positioning).
 - De appropriate cooperation model depends on the synergies to be achieved.
 - Commercial cooperation can help realise a shift in focus from 'territory' (the sites available in a certain port) to 'value creation supply chains'.
- PLA has developed expertise on this issue from an in depth study of the success of the only cross border merger in the port industry, between the ports of Copenhagen and Malmo, a project for the ports of Ghent and Zeeland Seaports (2005-2006) and at Port of Rotterdam (2010-2013).

Expertise (VI): Corporatization of a landlord port authority

- There is an ongoing transition in the ports industry towards port authorities that are autonomous, self-financing and in some cases corporatized. This transition has a huge impact on the port authority.
- PLA has in depth knowledge of the transition process of Port of Rotterdam Authority (PoR). PoR's performance has significantly improved following corporatization in 2004, in various aspects. It continues to operate as a landlord, but with an active commercial role.
- The PoR experience has led to important lessons learned concerning transformations of port authorities:
 - Corporatization can have significant benefits
 - Improved control of operational costs is one key potential benefit of corporatization.
 - Corporatization may trigger a transition of the company culture.
- PLA has experience through various projects for Port of Rotterdam Authority as well as projects for Suape (Brazil), the Port Authority of New York and New Jersey and ESPO (the European Seaports Organization).

Expertise (VII): Port policies

- Effective port policies can have a huge impact on the performance of the port sector and thus the role of a country / region in global trade flows. Often, effective policies directly contribute to growing trade flows.
- Port policies need to deal with such issues as:
 - economic impact of ports,
 - public interests in ports,
 - the innovation performance in the port & maritime industry,
 - the international competitive landscape in the ports industry.
 - Granting processes for concessions.
- PLA experience includes projects for the Dutch Ministry of Transport (>5 projects in the period 2001-2006), the development of a joint port policy document of PoR, and the Dutch Ministries of Economic Affairs and Transport (2012-2013), infrastructure policies of the port of Koper (2014), and European policies on port governance (2013-2014).

Expertise (VIII): Hinterland strategies

- The days when ports could afford to be focused on ‘the sea’ (maritime access, sufficient terminal capacity, availability and quality of nautical services) are over. Hinterland access is an increasingly important determinant of port competitiveness. So developing an ambitious hinterland strategy is vital for many ports.
- Our involvement in shaping the hinterland strategy of Port of Rotterdam Authority, and in key academic research in this area has led to expertise that may be valuable for customers involved in hinterland activities. Relevant issues include:
 - Mechanisms to realize a modal shift (from road to rail and barge).
 - Secure integrated development of inland terminals and *logistics parks*.
 - Development of new intermodal services.
- PLA experience includes projects for the Dutch Ministry of Transport (2005-2006, at Erasmus University Rotterdam) and the development of a hinterland strategy for Port of Rotterdam Authority (2010-2012), a strategy for the third largest European inland port (Liege, 2013-2014), a project to increase connections between Rotterdam and Bavaria (called Bayrolo, 2014), and the hinterland activities of Barcelona Port Authority, a best case in the industry (2010-2013).

Expertise (IX): Port, maritime and logistics cluster analysis

- The concept of a port/maritime/logistics cluster is increasingly popular. Mapping such a cluster helps in creating visibility for all port/maritime related activities in a country or region. Furthermore, it may help to enhance innovation and other cooperative projects in clusters.
- Over the years PLA has developed many insights on clusters, including:
 - The central benefits of clusters are cheaper supply of goods, lower transportation costs, a better labour market and innovation performance.
 - Leader firms play a critical role in clusters and
 - Developing effective forms of cluster governance is complex, but crucial for the long term development of a cluster.
- Relevant projects include projects for Rotterdam (2002-2003), Durban (2002) and the Lower Mississippi (2003), (all part of PhD research at Erasmus University Rotterdam) a large research project dealing with Brabant, a key logistics cluster in NL (2008-2012) and a second opinion on a plan for a large scale logistics park in Moerdijk (2013-2014).

Highlights 2013 (PLA established in April 2013)

Teach & Inspire	<p>In-house course at Port of Rotterdam Authority</p> <p>Contribution to MEL's executive education</p> <p>Contribution to NMU's executive education</p> <p>Co-organisator Port Executive Course</p>
Advise	<p>Evaluation of Port of Rotterdam's internationalisation strategy</p> <p>Expert advice to the Ports Regulator of South Africa</p> <p>Second opinion development of a logistics park in North Brabant (Dutch province)</p> <p>Second opinion vision regional masterplan for logistics</p>
Analyse	<p>Analysis of characteristics of seaports & airports in view of EU policy plans, for the European Seaports Organisation.</p> <p>Analysis of role of Netherlands as hub for Argentina's export flows to Europe</p>



Highlights 2014

Teach & Inspire	<p>In-house course on Port Concessions at Abidjan for Port Management Association of West & Central Africa.</p> <p>Contribution to MEL's executive education.</p> <p>Contribution to port development course for Pelabuhan Indonesia I.</p> <p>Contribution to Westhafen conference.</p> <p>Co-organisator Port Executive Course.</p>
Advise	<p>Evaluation of Port of Rotterdam's internationalisation strategy.</p> <p>Advise on implementing a system of Port Performance Indicators for Brazilian ports.</p>
Analyse	<p>Comparison between seaports & airports management, for the Port of Antwerp.</p> <p>Expert analyse on Green Intermodal Freight Transport Project for Port of Koper.</p> <p>Study on business opportunities related too Rotterdam-Liege connection for AWEX-UWE.</p>



Highlights 2015

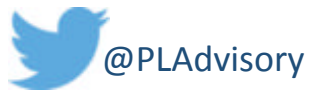
Teach & Inspire	<p>In-house course on Port Concessions at Tema (Ghana) for Port Management Association of West & Central Africa.</p> <p>In-house course on Port Management & Development at Setubal and Sines (Portugal) Setubal Port Authority.</p> <p>Contribution to MEL's executive education.</p> <p>Contribution to Nationale Havenconferentie.</p> <p>Co-organisor Port Executive Course.</p>
Advise	<p>Evaluation of Port of Rotterdam's internationalisation strategy.</p> <p>Advise on implementing a system of Port Performance Indicators for Brazilian ports.</p> <p>Contribution to Zeeland Seaports Masterplan.</p>
Analyse	<p>Comparison between seaports & airports management, for the Port of Antwerp.</p> <p>Expert analyse on Bunkering industry for Port of Tenerife.</p>



Highlights 2016

Teach & Inspire	<p>Contribution to two Dutch post-experience master programs.</p> <p>Contribution to a workshop for Valenciaport master program.</p> <p>Executive education for Port of Rotterdam.</p> <p>Executive education for Maersk Line.</p>
Advise	<p>Consortium-developing a master plan for a zone along the Panama Canal.</p> <p>Development vision for the newly developed inland port Flevokust.</p> <p>Advise on the vision and master plan for the port of Sohar (Oman).</p> <p>Work with the World Bank on port reform in Albania.</p>
Analyse	<p>Assisting port of Tenerife by an in-depth analysis of its position in the bunkering market.</p> <p>A liquid-bulk-terminal benchmarking study in collaboration with Teirlog Ingenieria.</p> <p>Development of a mathematical model to measure Spanish port hinterlands.</p>





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