



Sayı : 38591462-720-2023-34

05.01.2023

Konu : 11Th Biennial International Conference On Ports,
Shipping And Logistics 2023

Sirküler No: 5

Sayın Üyemiz,

Ticaret Bakanlığı Uluslararası Hizmet Ticareti Genel Müdürlüğü'nden alınan 30.12.2022 tarihli yazıda;

2023 yılı Mart ayının üçüncü haftası veya Nisan ayının ikinci haftasında düzenlenmesi planlanan ve Bombay Ticaret ve Sanayi Odası'nın ev sahipliğini yapacağı "11th Biennial International Conference on Ports, Shipping and Logistics 2023" etkinliği hakkında bilgi verilmektedir.

Söz konusu etkinliğe Hindistan'ın ulaşım, ticaret, demiryolları, liman ve lojistikle ilgili resmi kurum ve Bakanlıklarının yanı sıra, ülkenin önemli limanları ve lojistik şirketlerinin üst yöneticilerinin katılmasının beklendiği, Hindistan'dan ve yurtdışından denizcilik sektörü profesyonelleri, politika yapıcıları, imalatçıları, ihracatçıları/ithalatçıları, lojistik operatörleri, e-ticaret profesyonelleri ve yatırımcılarını bir araya getireceği, ABD, Fransa, Hollanda, Kore, Almanya, Japonya gibi ülkelerden konuşmacı ve katılımcılar beklendiği ve bu anlamda ülkemiz kamu ve ilgili sektör temsilcilerinin ilgili panellerde konuşmacı ve katılımcı olarak yer almalarını ve organizasyon kapsamında ortaklıklar kurmayı talep ettikleri belirtilmektedir.

Bilgilerinize arz/rica ederim.

Saygılarımla,

e-İmza

İsmet SALİHOĞLU
Genel Sekreter

Ek:

- 1- 30.12.2022 tarihli ve 5178 sayılı yazı. (1 sayfa)
- 2- Brief Information (3 sayfa)
- 3- Report (46 sayfa)

Dağıtım:

Gereği:

- Tüm Üyeler (WEB sayfası ve e-posta ile)
- Türk Armatörler Birliği

Bilgi:

- Yönetim Kurulu Başkan ve Üyeleri

Bu belge, 5070 sayılı Elektronik İmza Kanuna göre Güvenli Elektronik İmza ile İmzalanmıştır.



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- GİSBİR (Türkiye Gemi İnşa Sanayicileri Birliği Derneği)
- VDAD (Vapur Donatanları ve Acenteleri Derneği)
- TÜRKLİM (Türkiye Liman İşletmecileri Derneği)
- KOSDER (Koster Armatörleri ve İşletmecileri Derneği)
- UTİKAD (Uluslararası Taşımacılık ve Lojistik Hizmet Üretenleri Derneği)

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T.C.
TİCARET BAKANLIĞI
Uluslararası Hizmet Ticareti Genel Müdürlüğü

Ek-1

Sayı : E-45864022-724.01.03-00081422564
Konu : 11Th Biennial International Conference On
Ports, Shipping And Logistics 2023

DAĞITIM YERLERİNE

Mumbai Başkonsolosluğu Ticaret Ataşeliği'nden iletilen bir yazıda, 8 Aralık 2022 tarihinde Bombay Ticaret ve Sanayi Odası tarafından Ataşeliğimize gerçekleştirilen bir ziyarette liman, deniz taşımacılığı ve lojistik sektörlerine yönelik 2023 yılı Mart ayının üçüncü haftası veya Nisan ayının ikinci haftasında düzenlenmesi planlanan “11th Biennial International Conference on Ports, Shipping and Logistics 2023” etkinliği hakkında bilgi verildiği, Bombay Ticaret ve Sanayi Odası'nın ev sahipliğini yapacağı söz konusu konferansa Hindistan'ın ulaşım, ticaret, demiryolları, liman ve lojistikle ilgili resmi kurum ve Bakanlıklarının yanı sıra, ülkenin önemli limanları ve lojistik şirketlerinin üst yöneticilerinin katılmasının beklendiği, Hindistan'dan ve yurtdışından denizcilik sektörü profesyonelleri, politika yapıcılar, imalatçıları, ihracatçıları/ithalatçıları, lojistik operatörleri, e-ticaret profesyonelleri ve yatırımcılarını bir araya getireceği belirtilen konferansa ABD, Fransa, Hollanda, Kore, Almanya, Japonya gibi ülkelerden konuşmacı ve katılımcı olarak katılım sağlanacağı, anılan konferansa ülkemiz kamu ve ilgili sektör temsilcilerinin katılmasını, katılımcılarımızın ilgili panellerde konuşmacı olarak yer almalarını ve organizasyon kapsamında ortaklıklar kurmayı talep ettikleri ifade edilmektedir.

Bu itibarla, bahse konu konferansa ilişkin olarak kuruluşunuza üye firmaların, birer örneği ekte yer alan dokümanlar uyarınca, bilgilendirilmelerinin yararlı olacağı mütalaa edilmektedir.

Bilgilerini ve gereğini rica ederim.

Dr. Yusuf KARAKAŞ
Bakan a.
Genel Müdür Yardımcısı

Ek:

- 1- 11th Biennial International Conference On Ports Shipping and Logistics 2023 Brief Information
- 2- 11th Biennial International Conference On Ports Shipping and Logistics 2018 Report

Dağıtım:

İMEAK Deniz Ticaret Odasına
Mersin Deniz Ticaret Odasına

Bu belge güvenli elektronik imza ile imzalanmıştır.

Belge Doğrulama Kodu: D9B0AFFA-3368-4E27-BF31-791060D40AB0

Adres: Söğütözü Mah. 2176. Sk. No:63 06530 Çankaya Ankara

Telefon No: 03122049420 Faks No: 03122048637

e-Posta: ucary@ticaret.gov.tr

İnternet Adresi: www.ticaret.gov.tr

KEP Adresi:

<https://www.turkiye.gov.tr/ticaret-bakanligi-ebys>

Ayrıntılı bilgi için:

Yasemin Şükran UÇAR

Ticaret Uzmanı

Telefon No: 03122049420



Brief Information about upcoming Conference by Bombay Chamber

11th Biennial International Conference on Ports, Shipping and Logistics 2023

Proposed Theme: Envisioning Future of Logistics @2047

Proposed dates for the Conference: March third week Or April 2nd Week subject to the consent of Hon'ble Minister for Shipping and Minister for Commerce

Venue: Mumbai

Objectives:

- 1) Raise customers' issues and demonstrate possible solutions through the use of technology
- 2) Showcase and Examine Global Best Industry Practices for consideration/adoption
- 3) Explore future opportunities & market possibilities

Proposed Sessions and Subtopics:

1. Customer Centricity
2. Changing Business Models and Innovation in Logistics
3. Sustainable Logistics and Green Initiatives
4. Infrastructure for Seamless Logistics
5. Port-linked Industrialization (Sagarmala, Modernisation and Integration of ports with SEZs, Port based Smart Cities, Industrial Parks, Warehouses, Logistics Parks and Transport Corridors.)
6. Building Resilience in the Modern Supply Chain through Risk Management

Chief Guest & Guest of Honour (Proposed):

- Shri Nitin Gadkari, Hon'ble Minister of Road Transport, Highways
- Shri Piyush Goyal, Hon'ble Minister of Minister of Commerce & Industry
- Mr. Shri Ashwini Vaishnaw, Hon'ble Minister of Railways
- Shri Sarbananda Sonowal, Hon'ble Minister of Ports, Shipping and Waterways
- Shri Suman Bery, Vice Chairperson, NITI Aayog

Confirmed Advisory Board Members for the year 2023:

1. Mr. Rajiv Jalota, IAS, Chairman, Mumbai Port Authority
2. Mr. Sanjay Sethi, IAS, Chairman, Jawaharlal Nehru Port Authority
3. Mr. Ritesh Ramakrishnan, Joint Managing Director, Transworld Group of Companies
4. Mr. V S Parthasarathy, Vice Chairman, Allcargo Logistics Limited
5. Mr. Anil Radhakrishnan, Co-founder, Accex Supply Chain & Warehousing Pvt Ltd
6. Mr. C. R. Nambiar, CEO, Seahorse Ship Agencies
7. Mr. Nilesh Shah, MD, Kotak Mahindra Asset Management Co. Ltd



Bombay Chamber
of Commerce & Industry

8. Mr. Ritesh Tiwari, Executive Director - Finance, Hindustan Unilever Limited
9. Capt. Ram Iyer, Member - Advisory Board and Country Convenor

Some of the organisations we are approaching to increase the reach of the Conference:

- Baltic and International Maritime Council (BIMCO)
- Mumbai and Nhava-Sheva Ship-Agents Association (MANSA)
- Association of Multimodal Transport Operators of India (AMTOI)
- Federation of Freight Forwarders Association in India (FFFAI)
- Container Shipping Lines Association (CSLA)
- Indian Private Ports & Terminals Association (IPPTA)
- ICC Shipping association
- The Foreign Ship-owners Representatives and Ship Managers Association (FOSMA)
- Container Freight Station Association of India (CFSAI)
- Women's International Shipping & Trading Association (WISTA)

We will also have Print Media Partners, Online Media Partners, Knowledge Partners.

Confirmed Knowledge Partner: Ernst & Young, India

Expected Participation from following Countries (speakers+participants):

Turkey, UAE, US, France, Latvia, Netherlands, Denmark, Sweden, Korea, Belgium, Mauritius, Germany, and Australia, Japan, Greater Mekong subRegion, Indonesia

Expected Participation of Government Agencies:

Ministry of Ports, Shipping and Waterways
Ministry of Road, Transport and Highways
Ministry of Commerce
Ministry of Railways
Ministry of Micro, Small and Medium Enterprises
Mumbai Port Trust Authority (Confirmed)
Jawaharlal Nehru Port Trust Authority (Confirmed)
Directorate General of Shipping
Directorate General of Foreign Trade
Maharashtra Maritime Board
Mumbai Metropolitan Region Development Authority (MMRDA)
National Institute of Urban Affairs

Expected size of audience: Upwards of 250



Profile of Audience:

C-1 and C-2 level executives across industry sectors & Foreign Representatives, minimum 50% customer participation.

Stakeholders at the Conference

Over 30 national & international speakers, 4 guests of honour and 250+ participants are expected to participate. This conference shall bring together :

- Policy Makers
- Technocrats
- Manufacturers
- Banks & NBFCs
- Exporters and Importers
- Private equity & Venture Capitalists
- Ports
- Technology and IT service providers
- Maritime Boards
- E-commerce professionals
- Shipping Lines
- Foreign Trade chambers and councils
- Logistics operators
- Consulting Firms
- Infrastructure companies
- Investors from India and abroad

Media Coverage: Print Media, National dailies, Social Media, Online News platforms

Stakeholder Consultation : Personal interviews of about 20 Industry Leaders

Post event Advocacy and Consultation

- Release of Strategy Paper
- Post event consultation with relevant Ministries
- Wide publicity to output of stakeholder consultation
- B2B/ B2C Consultation Meetings for Key Partners

Organiser



10th Biennial International Conference Ports, Shipping & Logistics 2018

Official Support



Ministry of Shipping
Government of India
EK-3

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Photo Courtesy
JNPT

Next Generation Shipping & Logistics Relevance of Process Re-Engineering

16th Feb, 2018, Costa Neoclassica (Cruise ship), Mumbai



INDIAN PORTS, SHIPPING & LOGISTICS 2018

REPORT

Sincere Thanks

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Knowledge Partner



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To The Members of Maritime Industry,

Since the year 1998, Bombay Chamber has been organising biennial maritime conferences on various themes aligned with global trends.

In line with our tradition of deliberating on growth and regulation, the 10th Biennial International Conference on Port, Shipping and Logistics 2018 was focussed on the 'Next Generation Shipping & Logistics – Relevance of Process Re-Engineering'. Major areas of discussion were: **(a) Customer Centricity (b) Infrastructure for Seamless Logistics (c) Changing Business Models & Innovation in Logistics**

The Conference offered some important insights. First, the Logistics industry is expected to witness a regulatory push. Second, the focus will change from supply chain to value chain, thereby resulting in a change in the traditional role of stakeholders. Third, technology and innovation will no longer be perceived as an alternative; it will be a necessity for survival and growth.

Bombay Chamber thanks all the Financial Partners, Non-Financial partners, the Advisory Board members, Bombay Chamber Board members and the participants for making this event a real success.

Special thanks are due to our Chief Guest, Dr. Malini Shankar, IAS, Director General of Shipping; Chairman of the Advisory Board for the Conference, Mr. Sanjay Bhatia, IAS, Chairman, Mumbai Port Trust; Mr. Neeraj Bansal, IRS, Chairman-In-Charge, JNPT; Mr. P. K. Das, Member - CBEC and Mr. Noel Tata, MD, Tata International Ltd. and other senior members of the industry who spoke at the Inaugural session and Panel Discussions.

We are grateful to Costa Cruise India for supporting the novel initiative of holding a business conference aboard a cruise ship in Mumbai.

Looking forward for your continued engagement,

With Best Regards,

Vijay Srirangan
Director General



10th Biennial International Conference Ports, Shipping & Logistics 2018

PROGRAMME SCHEDULE

Introductory Remarks	Mr. F. N. Subedar , President, Bombay Chamber
Setting the Theme	Mr. Sanjay Bhatia , IAS, Chairman, Mumbai Port Trust and Chairman, Advisory Board for Port Shipping & Logistics Conference 2018
Key Observations and Recommendations from Industry Survey	Mr. Manish Saigal , MD, Alvarez & Marsal, India
Plenary Session	
Address by Guest of Honour	Trade Perspective Mr. Noel Tata , Managing Director, Tata International
	Trade Facilitation and Future of Customs Shri. Pranab Kumar Das , Member (Customs), CBEC
	Dynamics of Containerization Mr. Neeraj Bansal , IRS, Chairman-In-Charge, JNPT
Address by Chief Guest	
Vision for Seamless Logistics	Dr. Malini Shankar , IAS, Director General of Shipping, Govt. of India
Summary and Vote of Thanks	Mr. Anil Radhakrishnan , Co-Chairman, Advisory Board for Port Shipping & Logistics Conference 2018
Individual sessions	Future of Shipping and Logistics - Global Trends Dr. Yann Alix , Secretary General, Sefacil Foundation
	Digitally Reimagining Next Gen Ports Mr. Himanshu Shekhar , Product Head, Ports and Cargo Business, Tata Consultancy Services Ltd.
	Sustainable Logistics and Green Initiatives Mr. Sebastien Roux , Manager International Development, HAROPA Ports
	Defense Logistics Rear Admiral Sudarshan Y. Shrikhande , AVSM, Indian Navy (Retd) Dr. (Cdr.) Arnab Das , Director, Maritime Research Centre, Pune
	Maritime Safety & Related Risks in Shipping & Logistics Capt. Ashok Mahapatra , Ex-Director, International Maritime Organization Mr. Sanjiv Singh , DGM, New India Assurance Ltd.
Panel Discussion 1	Customer Centricity
Session Chairman and Moderator :	Mr. Deepak Shetty , Retd. IRS, (C&CE-Retd.), Former Director General of Shipping & Secretary to the Govt of India
Panelists:	1) Mr. Prem K Verma , Project Leader - Logistics Strategy, Tata Motors Ltd. 2) Mr. Umashankar Vadarahally , Asst. Vice President Terminal Operations, South Asia TOTAL Oil India Pvt. Ltd. 3) Capt. Swaminathan Rajagopalan , Commercial Director, CMA-CGM 4) Mr. Zarir Langrana , President - Global Chemicals Business, Tata Chemicals Ltd.

* Unable to Participate



Panel Discussion 2	Seamless Logistics through Infrastructure
Session Chairman and Moderator: Panelists:	Mr. Manish Saigal , MD, Alvarez & Marsal, India 1) Mr. Steve Felder , Managing Director South Asia, Maersk Line India Pvt. Ltd. 2) Mr. Mahmood Al Bastaki , Chairman, Dubai Trade, Chief Operating Officer, DT World; DP World 3) Mr. Gurpreet Singh Gill , Regional Head - Supply Chain & Logistics Solutions, Samsung SDS
Panel Discussion 3	Changing Business Models & Innovation in Logistics and Maritime Sector
Session Chairman and Moderator: Panelists:	Mr. Anant Swarup , Joint Secretary (Logistics), Ministry of Commerce, GoI 1) Mr. Sanjay Tiwari , Global Head of Sales, Maersk Trade Finance 2) Mr. Sourav Sadhukhan , Head of Cranes Centre of Competence & Vertical Manager- Ports, Siemens Ltd. India 3) Capt. Nikunj Parashar , Founder, Sagar Defence Engineering 4) Mr. Gem Beemsterboer , Director of Operations, Port of Amsterdam 5) Mr. Sudeep Mehrotra , Senior Director, Alvarez & Marsal India
Summation of the Proceedings	Mr. S. Hajara , Ex-CMD, Shipping Corporation of India
Vote of Thanks	Mr. Vijay Srirangan , Director General, Bombay Chamber



Speakers Profile



Mr. Noel N. Tata

Mr. Noel N. Tata is currently the Managing Director of Tata International Ltd. and Chairman of Trent Ltd. He has earlier worked with Nestle and Tata Exports Ltd. He is also the Chairman of Voltas Ltd, Tata Investment Corporation Limited and Tata Africa Holdings Ltd. Besides this, Mr. Tata is a Director of Titan Industries Ltd. and on the board of Kansai Nerolac Paints and Smiths Plc.



Mr. Pranab Kumar Das, IRS

Mr. Pranab Kumar Das Indian Revenue Service, 1983 Batch, is Special Secretary to the Government of India & Member (Customs), Ministry of Finance, New Delhi. He has worked in several capacities at various Customs formations in a career spanning 34 years. In 2014 he received the Presidential Award for specially distinguished record of service in the year 2014.



Dr. Malini Shankar, IAS

Dr. Malini V. Shankar, IAS, is currently posted as the Director General Shipping, Government of India. She has had an illustrious career spanning over 3 decades both at the field and at the policy level. Her key assignments have been in industry, electricity and water sectors. Prior to the current posting, she was Additional Chief Secretary to Government of Maharashtra. Her earlier postings include Commissioner of Industries, and Collector of Nagpur District.



Mr. Neeraj Bansal, IRS

Mr. Bansal is an officer of Indian Revenue Service with around twenty years of experience across the country in Direct Tax Administration, Investigation, Tax-payer Service, Vigilance, and Legal & Co-ordination. From 22nd August 2014, he is serving as Chairman-in-Charge at Jawaharlal Nehru Port Trust.



Mr. Sanjay Bhatia, IAS

Mr. Sanjay Bhatia is a Maharashtra Cadre IAS Officer in the rank of Chief Secretary with 32 years' experience in serving at various senior levels in Government of India and Government of Maharashtra. He is presently working as Chairman, Mumbai Port Trust. He has held a number of positions like Vice Chairman & Managing Director, CIDCO, Commissioner, Sales Tax, Chairman, Maharashtra State Electricity Board.



Mr. Anant Swarup

Mr. Anant Swarup, belongs to the 1992 batch of the Indian Railway Personnel Service. He has a rich experience in Railway logistics and trade. He has served on very important assignments like the Executive Director in the Railway Minister's office and the Permanent Mission of India to the WTO in Geneva. He has also handled important territorial divisions like NAFTA, Latin America and ASEAN.



Mr. Deepak Shetty, IRS

Mr. Deepak Shetty, an Indian Revenue Service (I.R.S.-Customs & Central Excise) officer had served as a career civil servant in the Govt. of India for over 36 years. He has eventually retired as the Director General of Shipping & Secretary to the Govt. of India in November 2016. He is, reportedly, only the second officer of the I.R.S. (C&CE), ever, to have been appointed in the rank and pay of full Secretary to the Govt. of India.



Capt. Ashok Mahapatra

Capt. Ashok Mahapatra has been serving as Director, Maritime Safety Committee at the International Maritime Organisation since October 2015. He is the first Indian to be appointed to this post. He has been with IMO since 1998. Before Joining IMO he has worked with organisations such as Scindia, South India Shipping Corp, Directorate General of Shipping.



Rear Admiral Sudarshan Y. Shrikhande

Admiral Shrikhande's early sea tenures were in Ships Taragiri, LCU-L32, Rajput torpedo. He served as ASWO/Ops officer of INS Ranvir for nearly four years wherein some new steps were initiated in combat effectiveness of some ASW systems and in ASW tactics. Further service at sea was in command of INS Nishank, XO of INS Delhi and CO, INS Kora.



Dr. Yann Alix

Since 2011, Dr. Yann Alix is the General Delegate of the Foundation SEFACIL which aims to set up and lead a unique international think-tank around prospective analysis on themes related to the future of Maritime Transport, Ports & Logistics. In the past 4 years, Prof. Alix was the Director of IPER (Port Training & Research Institute). He is also an Associate Researcher for Logistel in Portugal and collaborates actively in different training & engineering projects in Africa for the Port Authority of Le Havre.



Mr. Steve M. Felder

Mr. Felder currently holds the position of Managing Director – South Asia for Maersk Line. He leads the businesses in India, Sri Lanka, Bangladesh, Nepal, Bhutan and Maldives. Steve's career spans various industries, including retail, financial services and shipping. Prior to this appointment, Steve held various executive positions within Maersk Line in Nairobi, Israel, Canada and the USA.



Mr. Sebastien Roux

Mr. Sebastien Roux has taken up the role of Manager International Development, HAROPA Port Le Havre since 2016. He has 20 years' experience within the transport & logistics sector in France. In his new mission at HAROPA, he is in charge of Coordination of international representatives network and promotion and development of the HAROPA's international offerings to customers and stakeholders.



Mr. Mahmood Al Bastaki

Mr. Mahmood Al Bastaki is currently CEO of Dubai Trade; leading Dubai Trade to become an innovative trade and supply chain e-hub. An expert in e-commerce solutions, Al Bastaki served as the Chief Information Officer (CIO) of Dubai World Corporate Departments before taking up his current position. He is also the former Acting Director of E-Services of Dubai E-Government where. He is a Member of The UAE National Committee of World Trade Organization.



Mr. Sanjay Tiwari

Mr. Sanjay Tiwari is the Global Head of Sales for Maersk Trade Finance as well as the CEO of 21CC Education, a skill development company for the logistics industry. He has worked in India as Head of Sales for Maersk Line, in the US and The Netherlands for KLM Cargo and in Singapore and Malaysia for Van Leeuwen Pipe and Tube.



Mr. Prem Kumar Verma

Mr. Prem Kumar Verma is Project Leader – Logistics Strategy at Tata Motors. Prior to moving to this assignment he spent almost 25 years in Sales & Marketing in various capacities handling different product lines ranging from consumer products in Hindustan Lever, Lighting products and consumer electronics in Philips, Commercial Vehicles in Tata Motors Limited and was CEO of TML Distribution Company Limited.



Mr. Sanjiv Singh

Mr. Sanjiv Singh joined the New India Assurance in 1984 as a Class 1 officer and is currently working as Deputy General Manager of Marine Cargo Department. He's an associate of Insurance Institute of India, and has edited and published widely acclaimed book called ' Guide book on Marine Cargo insurance'.



Mr. Himanshu Shekhar

Mr. Himanshu Shekhar is Product Head, Ports and Cargo Business at Tata Consultancy Services; where he is leading ideation, design and development of innovative Business capabilities, for Sea Ports and Terminal, leveraging Digital Platforms like Cloud, IoT and Artificial Intelligence. Himanshu has worked for over more than 20 years in Logistics, Shipping and Port business playing various leadership roles in strategic Business and IT transformational initiatives.



Dr. (Cdr.) Arnab Das

Dr. (Cdr.) Arnab Das is a retired naval officer with over two decades of active service spread over sea tenures, R&D assignments, training duties and dockyard exposure. He has done his Master's and PhD from IIT Delhi and has over fifty papers and a book on underwater technology and maritime strategy to his credit. He has founded his own start-up and the Maritime Research Centre for underwater technology development in the Indian Ocean Region (IOR).



Capt. Nikunj Parashar

Capt. Nikunj Parashar is the founder of Sagar Defence Engineering, which has been recognised by Ministry of Electronics as one of the ten Best Start Up in the country in Electronic System design and Manufacturing in Strategic Electronic sector (Unmanned vehicle systems). He has 14+ years of work experience in Shipping Operations, Ship construction, Cargo & Port Operations and Safety Management.



Mr. S Hajara

Mr. Hajara was the President of Indian National Shipowners Association (INSA) for 5 consecutive years. He was also Director & Vice President of the International Shipping Federation. He is credited with SCI's foray as the first Indian shipping line in the niche area of liquefied natural gas transportation. He served at SCI as CMD from 2005 to 2012.



Mr. Anil Radhakrishnan

Mr. Anil Radhakrishnan is the Chief Executive Officer & Director of Adani Logistics Limited where he is responsible for the Business and infrastructure growth. He is also Board member at Bombay Chamber and Co-Chairman of the 10th International Conference on Port, Shipping & Logistics. He has more than 24 years of experience in Logistics, Shipping, Supply Chain and Consumer Industries where he has held various senior executive positions.



Mr. Manish Saigal

Mr. Saigal is a Managing Director with Alvarez & Marsal and he heads A&M's corporate solutions practice in India. He also leads the Transport & Logistics vertical for the firm in Asia, ME and India. He has as over 18 years of experience in management consulting, policy review, PE investment and M&A in the Indian transport & logistics sector.



Mr. Sudeep Mehrotra

Mr. Sudeep Mehrotra works as a Director in India office and he brings in over 10 years of experience in advising companies in areas such as- strategy and business planning, commercial due diligence, sales and operations improvements in logistics and infrastructure Industry. Prior to joining A&M, he worked with APM Terminals where he served as Head, Business development and Projects, Inland Services, South Asia.



Mr. Zarir N. Langrana

Mr. Langrana is currently the President – Global Chemicals Business of Tata Chemicals Ltd. where he has served for over 30 years, and is responsible for its operations and growth across four continents. In addition, he heads the Nutraceuticals and the new Advanced Materials businesses for TCL. He also serves on the Boards of the Company's International subsidiaries.



Mr. Gem Beemsterboer

Mr. Gem Beemsterboer is Director of Operations at Port of Amsterdam International. In March 2015, he started working as Project Leader at PoAI, where he identified commercial opportunities, initiated international port management and consultancy projects. Since Sep 2016, he has been responsible for overall growth and success of international projects and long-term partnerships of Port of Amsterdam around the world.



Mr. Umashankar Vaddarahally

Mr. Umashankar Vaddarahally is Asst. Vice President Terminal Operations, South Asia at TOTAL India. He has Over 27 years of experience in Operations, projects & HSE in cryogenic/LPG industry. Under his leadership, Total's Mangalore Maritime Terminal has won over 23 awards pertaining to HSE from Govt. of Karnataka & National Safety Council.



Mr. Gurpreet Singh Gill

Mr. Gill is leading the strategic expansion plans for Samsung SDS, the global supply chain arm of Samsung group in India. He has over 13 years of experience in supply chain and logistics management with expertise in cross functional roles. In early 2015 he moved to Samsung SDS and took stage among the specialists to set up Samsung SDS in India as a logistics organization.



Capt. Swaminathan Rajagopalan

Capt. Rajagopalan is currently Serving as Commercial Director - CMA CGM India. He started his career sailing on various vessels like Dry Bulk, PCTC, etc. for 17 years. Being a link in the chain of the entire transport industry in 2007, he came ashore and joined MSC Agency India, to explore the entire logistics, supply chain industry.



Mr. Sourav Sadhukhan

Mr. Sourav Sadhukhan joined Siemens Ltd., India in 1995 where he started his career in Service Department for Industrial Drives & Automation products. In 1999 he went to Siemens Germany for a special assignment and on returning took over responsibility of designing, commissioning and training on Cranes Application. Since, 2006 Mr. Sourav moved to Head office in Navi Mumbai and in 2010 he took over as Head of Cranes Application in 2010.



Mr. F. N. Subedar

Mr. Farokh Subedar has been with the Tata group for over three decades and functioned as Chief Operating Officer & Company Secretary of Tata Sons. Currently, Mr. Subedar is associated with Tata Sons as Senior Advisor working closely with the Group Chairman and Group CFO. He is also President of The Bombay Chamber of Commerce & Industry for the year 2017-18.



Mr. Sunil Mathur

Mr. Sunil Mathur is the Managing Director and Chief Executive Officer of Siemens Ltd. since 2014. He is currently a Member of the Global Leadership Team of Siemens. Prior to 2014 he was the Executive Director and Chief Financial Officer of Siemens Ltd from 2008 responsible for the same countries. He has been with Siemens for over 30 years, holding several Senior Management positions.



Mr. Vijay Srirangan

Mr. Vijay Srirangan took over as the Director General of Bombay Chamber of Commerce & Industry in February 2016. Prior to this he had spent thirty six years with the Tata Group as a part of the Tata Administrative Services (TAS) focused in TCS. He has had a wide spectrum of responsibilities which includes Training, Applied Technology Research, International Sales, Turnkey Engagements as well as Systems Integration.



Introductory Remarks by Conference Chairman



Mr. F. N. Subedar,
President, Bombay Chamber

Welcome Address by Mr. F. N. Subedar, President, Bombay Chamber* Distinguished Guests, Distinguished Speakers, Advisory Board, Ladies and Gentlemen, a warm welcome to you all at the 10th Biennial International Conference on Ports Shipping & Logistics 2018, being organised on this wonderful cruise ship.

At the outset, I would like to brief you about Bombay Chamber.

Bombay Chamber has been playing a proactive role in India's development for the last 181 years. The Chamber serves as an effective vehicle of communication between regulatory bodies, the corporate world and society at large. I have the privilege to mention that of its several thousand members encompassing a wide spectrum of industry houses, one-third represent large corporate and the remaining two-third represent the SME sector. It is very interesting to note that more than a dozen of the large corporate have been our members for more than 100 years.

The Chamber's Unique Selling Point is the intellectual capital inherent in its membership. We, therefore, concentrate on promoting good governance and ethical conduct in business and

public life, in addition to ensuring equitable and balanced industrial growth of the country.

I have the proud privilege to mention that the Chamber, playing the role of "Corporate as a Citizen", has undertaken and very actively engaged in activities, to name a few :

- Working along with Bombay High Court for setting up of a mediation Centre;
- Tying up with BEST for creating world class maps for BEST bus routes;
- Working along with USAID for sustainability-related training programs;
- Undertaking studies and research projects for the betterment of the city as well as its economy under the two Trusts of the Chamber i.e., BCPRF and BCTEMS.
- Engaging with educational and training institutes for facilitating industry academia collaborations.

It is my privilege to bring to the kind attention of the dignitaries and guests that with the help, and very largely at the dictation and instigation of the Chamber, the developments not only in Mumbai but also at the national level, have transpired uninterruptedly up to the present day. To name a few,

- (i) Chamber's relentless advocacy of an efficient nationwide postal system and standardised postal rates led to the passing of the Classic Indian Postage Act of 1854.
- (ii) Setting up of machinery for arbitration of commercial disputes as early as 1880, when it established customs of trade and gave decisions regarding weather-working days at the Bombay Port – activities which continue even to this day.
- (iii) Presentation of accounts in published form was first done by the Bombay Chamber in 1860-61 and the Chamber was the first organization in the country to have its annual

accounts audited by a professional firm of auditors in 1881-82.

- (iv) The Bombay Chamber secured in 1929 the recognition of private provident funds conducted on prescribed lines and their exemption from income-tax and thereby the removal of a disability under which private provident funds had suffered as compared with Government and quasi-Government funds.

For the first time, Bombay Chamber is organising such a conference on a Cruise Ship. The objective of the 10th edition of our flagship conference is to examine solutions for improving efficiency of “End-to-End Logistics” in India, keeping “Customer” in focus ; by deliberating on areas such as Digitisation, Infrastructure

Investment and Ease of Doing Business for Customer Centric Maritime services.

The conference will see Industry Stalwarts bring their diverse perspectives to the Panel discussions and facilitate an enriching experience.

I would like to thank you all for taking time from your busy schedule and joining us today.

Now, without further ado, I would like to request Mr. Sanjay Bhatia, Chairman, Mumbai Port Trust & Chairman of this 10th International Conference, to set the theme of today’s proceedings.

*(Edited transcript of the Speech)





Theme Setting by Mr. Sanjay Bhatia



Mr. Sanjay Bhatia

**Chairman, Mumbai Port Trust &
Chairman, Advisory Board at the 10th Biennial
Conference on Ports Shipping & Logistics**

Mr. Sanjay Bhatia commenced his address by sharing a remark by Prime Minister Narendra Modi, Hon'ble Prime Minister had stated that there are hardly any passenger cruise ships along the Indian coastline. For this purpose, Hon'ble Minister for Shipping, Mr. Nitin Gadkari identified five major ports and created a special task force to develop tourism along these Indian ports through International cruise ships. The Tourism and Shipping Secretaries together created a set of standards such as Standard Operating System (SOP) I and II, and Exemption of Biometric Enrolment for cruise passengers, to help cruise tourism and subsequent revenue. SOP-I is for simplification in immigration, customs and port procedure, and security through Central Industrial Security Force (CISF). There are additional 10 points in the checklist laid down in SOP-II. All the five ports have adopted these standards and the results are already showing visible signs of improvement.

Exemption of biometric enrolment for cruise passengers is also considered a game changer. Biometric enrolment of passengers is required at the port of the first arrival for immigration

clearance under E- Visa. Generally, there are roughly 3000 passengers on every cruise ship. Each passenger takes 6-7 minutes for biometric enrolment. But now the government has exempted e-visa holders from biometric enrolment for a period of three years until December 31, 2020. This exemption will facilitate expeditious immigration clearance of cruise passengers with e-visa, enabling them to spend more time on the shore. The exemption of biometric enrolment on arrival of ships is an important criterion for cruise liners to include a destination in their itinerary. Ports have also reduced ship related charges for a cruise ship. Consequently, the cruise business at major ports in India is set to get a major boost with the introduction of these facilities.

He further mentioned that according to an international consultant appointed by Mumbai Port Trust, there will be 4.2 million cruise passengers in near future. Out of that Mumbai port will get around 3 million passengers. The priority of Mumbai Port is shifting to cruise from cargo. Two cargo sheds have been removed from the cruise terminal. Mumbai Port plans to construct a new international cruise terminal similar to domestic airport. The objective is to make India attractive to cruise passengers and to promote cruise tourism in the country. Costa Cruise, Royal Caribbean Lines and some other cruise liners have shown interest in making Mumbai their home port as well.

Sagarmala Project to transform the Maritime Sector in India.

There are 500 projects under the Sagarmala umbrella with a total investment is Rs. 8 Lakh crores. Out of 500 projects, 225 projects have already been started. Huge employment is estimated to be generated through the Sagarmala project. This whole project is based on four pillars namely,

- Efficiency Improvement and Capacity Addition

- Port Community System
- Port Lead Industrial Development
- Community Development

New Technology and New Security system to be installed.

Mr. Bhatia emphasized that port access system and port security are very important. New technologies are being incorporated in Radar, submarine equipment, and Internet-based integrated software. Indian Navy has already deployed new technologies in security systems. Mumbai Port is also moving forward in this direction and has initiated talks with the Maharashtra Government in this regard.

Cooperation between Ports to save Logistics Cost.

Mr. Bhatia also said that all of Mumbai's cargo containers are discharged at JNPT. Presently import containers go to Bhiwandi from JNPT and from there they come to Mumbai city. This transport pattern creates huge congestions on road and also cost more for a Mumbai based importer. Therefore MbPT is in collaborative talks with JNPT, in order to bring these containers from JNPT to Mumbai Port by sea route for further clearance.





Key Observation and Recommendations from Industry Survey



Mr. Manish Saigal
Managing Director, Alvarez & Marsal, India

Mr. Manish Saigal appreciated the idea of holding a maritime conference on a cruise ship. He explained his approach towards Logistics industry. It is not about only problems, issues and challenges of logistics industry but to think about the Indian economy in general and logistics sector in particular. It's about how driving infrastructure growth will take to the country to the next level. The attempt is to foresee possible achievements in the logistics sector in the next 10 years.

Earlier, we used to talk about ports, railways, and roads separately. But now for the first time, we are bringing all these under the common umbrella of logistics. The landscape of logistics sector is visibly changing.

High Logistics Cost in India

The logistics industry is a 40 million dollar industry. But currently it is a very unorganised sector with only 10% of organized activities. Therefore, efficiency cannot be maintained. This inefficiency is the biggest cause of inflated logistics costs. Our logistics cost currently is 16% of the GDP. This cost is much higher than other countries. China on the other hand has one of the lowest logistics costs in the world. It provides for an interesting and commendable case study.

Three Pillars of Logistics Industry

The logistics industry stands on the three pillars of SIT **1) Scale 2) Integration and 3) technology**

1) Scale - Economies of scale is plaguing the logistics industry. Average size of our warehouses is roughly 10,000 square feet compared to 40,000 square feet in some other countries. Similarly, our Multi-modal Logistics parks are spread over 30-35 acres of land whereas China has facilities spread over 250 acres of land. The scale of operations needs to be beefed up, only then will we benefit from economies of scale and lower per unit costs. Hence the focus should be on working towards creating infrastructure at par with global standards. We need an ecosystem that will look at large Multi-Modal Logistics Parks leading the operations, and eventually graduating to Integrated Logistics and Manufacturing Zones.

2) Integration - We have already adopted an integrated approach towards the maritime and logistics sector. Sagarmala project is the best example of this concept. We will see increased rail-road connectivity for the hinterland with ports, thereby reducing transportation time and costs, while generating huge employment potential.

3) Technology -Technology is critical in the Logistics sector today. Large physical transporters who run their business on offline models will be replaced with those who provide quick and seamless online services. The role of Artificial intelligence, IoT, machine learning, Big Data Analytics, use of robotics in warehouse management and cargo aggregation are the way forward. Only those freight forwarders that provide integrated online service at every stage; will sustain themselves and exist. On the back of improved technology, a three fold growth is expected in logistics sector within next five years.

Plenary Session

Address by Guest of Honour - Trade Perspective



Mr. Noel Tata
Managing Director, Tata International Ltd and
Chairman Trent Ltd.

Mr. Tata expressed his happiness on Indian economic growth is being given due recognition universally. He mentioned that infrastructure will be a key factor for achieving rapid growth in trade and manufacturing.

Efficiency of Indian ports

India has 12 major and 200 minor ports along its vast coastline. Apart from this, 6 more mega port projects under Sagarmala are coming up. Indian ports have handled 1130 Million tons of cargo during 2016-17, which is 5.7% higher than the earlier year. Indian ports and shipping sector have a vital role in facilitating trade and commerce.

The performance of domestic ports has improved substantially. The turnaround time at Indian major ports has reduced to 3-4 days currently from 7 days earlier. However India still need to match up to the global average of 1-2 days. Indian ports have to adopt new technology for automation, electronic data entry, vehicle monitoring and documentation with minimum manual handling. Port capacity needs to upgrade. PPP agreements help with the operational matrix and also help keep logistics cost low. Efficient Logistics chain is a manufacturer's "Bible".

Problems of Port Projects

Mr. Tata further stated that there are many green field projects planned along the Indian coastline. However executing these projects is challenging. There are four important elements of all port projects namely:

1) High Cost of Projects -The capital investment in India in projects is very high compared to the rest of the world, which makes it difficult to obtain financing through international institutions.

2) Coastal Regulation Zone (CRZ) policy - Some of the port projects are held up due to the Coastal Regulation Zone Act, which does not clearly list the policy restrictions.

3) Land acquisition - Productive land is a very valuable asset in India. The landowner should be properly compensated in such acquisitions and wherever possible, port projects should be relocated or planned on not so productive land parcels.

4) Delay in project execution - Port projects are delayed due to various reasons such as corruption, political backlash, inefficiency and so on. Such projects reach saturation point within few years of commencement. The government needs to remove these bottlenecks to encourage more participation.

Inland Waterways

Mr. Tata opined that an inland waterway is a low cost and environment-friendly mode of transport. Europe has a good network of inland waterways. India has made an agreement of 375 million USD with the World Bank to improve our inland waterways system. The first move in this direction is the setting up of the Jalmarg Vikas project from Varanasi to Haldia along the river Ganga.



Maritime Economy

In his concluding remarks, Mr. Tata added that India has a 5717 km vast coastline, with 95% of cargo by volume and 70 % of cargo by value passing through our ports. Therefore, the contribution of ports is tremendous. The Indian

government is setting up 14 coastal economic zones and also introducing maritime clusters. All these significant maritime developments will help generate huge employment and will boost local economy along the coastline.

Trade Facilitation and Future of Customs



Mr. Pranab Kumar Das

Member, Central Board of Excise and Customs,
Ministry of Finance, Government of India

Mr. Das began his address stating that Customs has a crucial role to play in cross-border trade, as it can lead and facilitate trade in India by way of simplification of its procedures. In this regard, the Customs is actively marching ahead to implement a procedure by which there is mutually recognized agreement between two countries for the purpose of cargo clearance.

Trade Facilitation Agreement of WTO

The World Trade Organization (WTO) has laid guidelines for Agreements on Trade Facilitation in 2017. According to this agreement, every member country has to provide easy access to cross-border trade. Earlier there were high tariff rates and Non Tariff Barriers (NTB). But now the world is moving towards lower tariffs, simplification of customs procedures, standardization of tariffs, faster clearance system and minimum interference. The World Customs

Organization (WCO) and Central Bureau of Excise and Customs (CBEC) are adopting many systems and processes to match the Trade Facilitation Agreement of WTO.

Simplification of Procedures

Many Government agencies are involved in cross-border trade. Out of those six agencies have come together to set up a common electronic platform in a bid to facilitate trade activities under a single window clearance system. This SWIFT-Single Window Interface for Facilitating Trade Clearance commenced on 1st April 2016. Fifteen more government agencies are expected to come under the ambit of the SWIFT network very soon.

The Customs Authority has introduced 'ICEGATE' under its EDI (Electronic Data Interchange) system to process documents electronically. They wish to remove unnecessary restrictions, contact points and have risk-based minimum interference in trade activities. Shipping lines will also issue E- delivery orders in near future. The Customs Authority has also introduced a consignment based self-assessment system which is based on client trust. Ports have also introduced PCS (Port Community System) where the Customs forms an integral part of the value chain.

Accredited Client Programme (ACP)

The Customs is serving exporters and importers who have robust frequent consignments transported under Direct Port Delivery (Import) and Direct Port Entry (export). In an attempt to promote seamless global trade,

Indian ACP clients who register themselves as AEO (Authorized Economic Operator) will be served worldwide and can operate hassle free at an international level.

Authorized Logistics Operator (ALO)

Many logistics service providers such as Custom House Agents, Freight Forwarders, Seaports, Airports, ICD's, CFS, Foreign Post Offices are involved in cross-border trade. They have to register under the Customs Act they have certain obligations and responsibilities towards trade. This promotes greater transparency, efficiency and coordination.

Pranab Kumar Das, Member, CBEC hence focused on the Role of Customs in Trade Facilitation. He explained the initiatives of Customs in simplifying procedures related to cross border trade. He also emphasized the need of Authorized Logistics Operators (ALO). He advised Indian ACP (Accredited Client Programme) operators to switch to AEO (Authorized Economic Operator) at an international level. He also suggested having a mutually recognized agreement between two countries for cargo clearance. According to him, all these efforts would support global supply chain management, e-commerce and the trade.

The Dynamics of Containerization in India



Mr. Neeraj Bansal, IRS
Chairman-in-Charge, JNPT

Mr. Neeraj Bansal began his address stating that containerization is the biggest disruptive technology and out of box idea which has transformed the maritime sector. Earlier, Mumbai Port was the preferred port for break bulk cargo with a 30,00 plus workforce. However with the coming in of containerization, many port operators have switched from bulk cargo terminals to container terminals. One of the main issues of containerization in India is that the capacity is not fully realized and growth is very

slow. India handles 14 million TEU of container volume annually while the global estimate is 600 million TEU. Shanghai Port alone handles 35 Million TEU's per year. In India five to six major ports handle about 80% of the containerized cargo volume. Containerization has not fully penetrated the economy.

Global issues

Issues in container transport witnessed globally include Empty Repositioning of containers and Less than Container Load (LCL). Traders have to pay heavily to ship empty containers back to the shipping line after their consignment is delivered, which inflates logistics costs. Industry experts and consultants are already working on finding solutions to this. Also, the cargo handling cost of Less than Container Load (LCL) is three times more than that of Full Container Load (FCL), even though the container operations for both are the same. If these two points can be tackled then it will be a big game changer for the maritime transport sector.

Measures taken by JNPT

Mr. Bansal shared his views on some of the major initiatives taken up by JNPT.



1. Efforts to facilitate Cargo Aggregation

In India, there is a huge concentration of SME's and agricultural enterprises who do not necessarily have the capacity to ship full container loads. Therefore, JNPT has planned to set up four dry ports in Maharashtra which will serve as cargo aggregation centers, to help optimise the benefits of containerization and help exporters cut their logistics costs. JNPT has already set up an Inland Container Depot at Wardha in Maharashtra. This will provide better last mile connectivity and will help local manufacturers adhere to 'Just in Time' delivery along their supply chain.

2. Trade facilitation

JNPT has already introduced Direct Port Delivery (DPD) system for import containers and Direct Port Entry (DPE) for export containers. This system helps importers and exporters reduce cargo handling costs at the port. Currently 70% of importers use DPD and they save roughly Rs 8000 per TEU. On the other hand, when a FCL export container comes to the terminal through Buffer yard, the exporter has to pay Rs 3000 as handling charges. But currently the export container comes directly to the port under Direct Port Entry, thereby saving time and costs.

3. Boost to exports

JNPT has also set up a port-based SEZ in JNPT

to provide manufacturing, warehousing and other value added facilities to the trade community. This is expected to give boost to the manufacturing sector and increase exports.

4. New IT based transportation system for goods

JNPT is planning to introduce an Internet-based transportation system like 'Uber' that will make available trailers and trucks for container repositioning. Under this system, the exporter will take the container to the shipping lines' yard and an importer will use the same truck to take his incoming consignment to his facility. When this new model, 30% of the trucks are expected to reduce from roads. This system is expected bring down transaction costs and ease congestion.

5. Collaboration between JNPT and Mumbai Port Trust

Containers belonging to Mumbai city are currently discharged at JNPT. These containers then go from JNPT to Bhiwandi for warehousing, and from there come to Mumbai city. The present traffic pattern (JNPT-Bhiwandi-MUMBAI) leads to huge congestion on roads and extra cost to the Mumbai based importer. But now with the new arrangement, import containers of JNPT will come to Mumbai Port via sea route. Importers can take delivery of their containers at Mumbai Port itself. This will not only decongest roads but also reduce transit time and cost.

Conclusion

Mr Bansal concluded by saying that new generation reforms will help fully realise the economies of scale and potential of containerization in India. This would be a great step towards providing relief to trade and the common man.

Address by the Chief Guest Vision for Seamless Logistics and Maritime Infrastructure in India



Dr. Malini Shankar, IAS
Director General of Shipping,
Government of India

Logistics process

In the beginning of her speech, Dr Malini Shankar explained that Logistics is the process of planning, control and implementation of goods and services from point of production to the point of consumption. There are two elements in logistics 1) Customer and 2) Service provider Each element has its own perspective. The customer expects delivery of goods within the agreed time, minimum cost and due care. The logistics service provider expects procedural simplification and an efficient and cost effective delivery model. The common objective is the same, which is to achieve minimum cost and enhanced efficiency. With the view of meeting the above objective, Directorate General of Shipping is reviewing the Multi-Modal Transportation of Goods Act 1993.

Review of Multi-Modal Transportation of Goods Act (MMTGA)

She informed the audience that the Directorate General of Shipping (DG Shipping) is reviewing two aspects of this act -

(a) Transforming charges levied by service provider & Multimodal Transport Operator(MTO)

(b) Registration and conduct of MTO. The DG Shipping has also undertaken the amendment of the Multimodal Transport Act, 1993 to facilitate and resolve stakeholder grievances. The amendment is currently at the draft stage and we are seeking suggestions from stakeholders to make the process simpler and bring everything on the online platform.

Customs House Agents, Freight Forwarders, Transporters, Warehouse operators, Container Freight Station Operators, Customs and Port Authorities, ICD operators and Shipping Lines have to come gather to process relevant documentation to reduce logistics cost by efficiency enhancement.

Integrity in Logistics Sector

The government is dedicatedly working towards developing the logistics sector in India. A separate Logistics Department has been created in the Ministry of Commerce to carry out reforms in this sector. Simplification of Port-Customs and Container Freight Station (CFS) procedures have already been launched. The review of Merchant Shipping Act 1958, Major Port Trust Act 1963 and Multi-Modal Transportation of goods Acts 1993 are being thoroughly reviewed as part of 'Ease of Doing Business' initiatives in India.

India's Strong Maritime Sector

India has 7517 km long coastline and 20,000 km inland waterways in navigable rivers. Apart from this, India has more than 200 major and minor ports located along Indian coastline. Indian ports have handled 1,758 Million Metric Tonnes cargo with 8% growth per year. India also has 28 shipyards to meet the requirements of ports and shipping industry; and 145,000 skilled seafarers and various dedicated Maritime Universities for professional development.

Traditional ship Building

Dr. Shankar shared that in the past, Indian

sailing vessels were used by Oman and the Middle East to ferry passengers and cargo. These ships were being built in traditional shipbuilding yards located along our coastline. Indian traditional boat builders were a highly skilled workforce. Traditional wooden shipbuilding along Indian coastline is a maritime heritage. Therefore, the Indian industry may look at its preservation too.

Sagarmala is a flagship programme of the government and one of the key focus areas is the development of the community. Hence there is an opportunity to connect traditional boat building industry with coastal shipping.

Reforms in the Maritime Sector

Dr Malini Shankar highlighted the initiatives of the Ministry of Shipping. There is a huge opportunity for investment in the shipping sector with the introduction of the following reforms:

- Approval of 100% FDI in the shipping sector
- Exemption from Section 3 of Competition Commission of India Act 2002 for vessel-sharing arrangement of

Shipping Lines

- Cabotage relaxation to foreign flag vessels such as passenger cruise ships and specialized vessels
- Rebate of 30% allowed for Major ports for Port charges charged to Cruise ships
- Exemption in Customs import duty and Excise duty on fuel, for a ship which carries import-export and empty containers between two Indian ports

DG Shipping has also taken various initiatives for simplifying procedures and bringing them on the digital platform, some of them are:

- Online permission for Ship Chartering
- Online payment facilities
- Application for Multimodal Transport Operator (MTO) License
- Online Ship registration

In her concluding remarks, Dr Malini Shankar appreciated the efforts of Bombay Chamber and Mumbai Port Trust for organising the Maritime Conference on a Cruise ship, thereby promoting new avenues for ports through cruise tourism.



Vote of Thanks in the Inaugural Session



Mr. Anil Radhakrishnan
Board Member, Bombay Chamber

Mr. Radhakrishnan appreciated the efforts of Bombay Chamber's team members in organising the event. He specially thanked core members of the Advisory Board; Mr. C.R. Nambiar, Capt. R..R. Iyer and Mr. Vijay Srirangan. He also thanked Mr. F. N. Subedar, President, Bombay Chamber for his continuous support and guidance without which this event would not have been possible.

Mr. Radhakrishnan extended his regards to Mr. Sanjay Bhatia for supporting the idea of conducting the conference aboard a cruise ship.

He expressed his sincere regards to Mr. Noel Tata for throwing light on the need for infrastructure development to augment capacity. Mr. Tata had mentioned about key elements of the maritime and logistics sector such as high cost of projects, land acquisition policies and delay in project execution.

Mr. Radhakrishnan thanked Shri. Pranab Kumar Das, Member (Customs), CBEC, for highlighting the initiatives of the Customs in improving and facilitating trade activities.

Mr. Radhakrishnan offered special thanks to Mr. Neeraj Bansal, IRS, Chairman-In-Charge, JNPT for being a part of our event and explaining how we can derive maximum economic benefit from containerization.

He expressed his sincere gratitude to Dr. Malini Shankar, IAS, Director General of Shipping, who spoke about the need for seamless movement of goods, which is the core of logistics

While concluding his speech, Mr. Radhakrishnan thanked all the participants who made the event a great success.





Future of Shipping and Logistics - Global Trends



Dr. Yann Alix
Secretary-General, Sefacil Foundation

Dr. Alix commenced his presentation by stating that the key trends of the container shipping industry in current times and in future would be - mergers, acquisitions and strategic alliances. In a bid to capture global trade, ninety-six percent of cargo movement between Asia & Europe today is controlled by fleets who are products of shipping alliances. There are four major shipping lines today dominating two-thirds of freight volume on the Asia-Europe route.

These four major shipping lines have their own business strategies. Earlier, their strategy was to cut costs, but now the focus is to provide service quality that differentiates them from the rest. Over the years they have reduced transportation & transaction costs by deploying the strategy of geographical concentration. When a large french shipping conglomerate started its operations, there was no geographical concentration advantage, however with collaborations they have achieved this. The aim for shipping lines now is to provide premium service while maintaining costs.

Indian shipping industry

Since there is no large Indian container shipping line which operates globally, innovative thinking and capital infusion is required to put

India on the global map.

Transportation structure of India

Many countries use inland waterways extensively. But India still majorly depends upon road transportation. As per the World Bank report, two-third of India's inland cargo is being transported by road. 65% of cargo is transported by road and only 27% and 0.5% by rail and inland waterways respectively. As a result, Indian roads are congested with goods traffic. One of the biggest opportunities for India is to fully utilize waterways and plan in advance on how to handle future capacity.

The international shipping sector has changed with the entry of e-commerce players like Amazon and Alibaba. Amazon alone shipped 1 billion shipments in the United States last year. India is expected to handle around 100 Million TEU in next two decades. Will India be in a position to tackle such volumes efficiently? That needs to be planned today. There are new technologies emerging in containerization. CMA-CGM has started new ships with 20,000 TEU capacity that run on LNG. India has to prepare a strategic plan on how to accommodate such big vessels in its terminals. There are also other technological changes taking place such as automated tracks at terminals, green barges, and electronic ships. Anticipation and planning of next-generation shipping is essential. India's Sagarmala project should bridge the gap between present and near future.

Integration of value chain and digitised processes

There are many stakeholders across the global value chain in maritime trade such as freight forwarders, Customs, terminal operators and Multimodal transporters. Highest efficiency can be achieved when all these stakeholders are integrated and brought together on a common platform. Port Community System (PCS) is one such example of integration. All stakeholders

have to exchange information with each other to streamline procedures.

Anticipation & increased cooperation is the way forward

Dr. Alix concluded that India needs to look at

the mid term and long term perspective from a global standpoint for its maritime industry and focus on developing a system that will allow stakeholders to cooperate, collaborate, co-share and co-initiate.

Digitally Reimagining Next Gen Ports for Enhancing Stakeholder Experience



Mr. Himanshu Shekhar
Product Head, Ports and Cargo Business,
Tata Consultancy Services

Mr. Shekhar, through his presentation, described the direction of technological growth today which is moving from pure technology solutions to enhancing user experience. He highlighted TCS's experience in ports and shipping solutions since the inception of Business 4.0 platform, which is custom designed for the maritime industry to help organisations scale up to the next level.

He explained how digital platforms can be leveraged to help transform businesses, expand capacity and improve key performance indicators (KPIs). Solutions such as Business 4.0 incorporate artificial intelligence, machine learning, IOT and robotics to cater to the rapidly changing business environment. These platforms cater to the business problem and business value challenge, while enhancing experience for stakeholders at

all levels. In short they bring people, process and technology together.

Digital platforms need to factor in the characteristics of the ecosystem around us. For example, if one start using fully automated vehicles on Indian roads, the technology will not yield effective results as the ecosystem is not mature enough to handle such changes presently.

New areas of focus also include port inclusive development and smart port cities. Smart Ports have become the new norm for the shipping industry. Smart cities operate on port community systems which integrate processes and yield measurable results. A port qualifies as a smart port if it fulfills the following criteria: Sustainability, Future Readiness, Resilience, Responsiveness /Agility & Ability to Capture Data.

He informed the audience that TCS is experimenting with automation of port terminals in a pilot project. Some of the breakthroughs include automatic communication between equipments for higher productivity in terminal operations. For example, a container will communicate with the quay crane, the ship will communicate with the shore cranes, rubber tyred gantry cranes and so on. Other experiments include container damage recognition, drones, inventory reconciliation and remote controlled equipments.

Mr. Shekhar concluded that India needs to learn from global initiatives to identify what it takes to harness a digital platform and grow to the next level of digital ports.



Sustainable Logistics and Green Initiatives



Mr. Sebastien Roux
Manager International Development,
HAROPA Ports Le Havre

Mr. Roux, during his presentation highlighted the efforts taken by HAROPA Ports in the areas of sustainable development and green initiatives.

HAROPA is a multi-purpose port handling different types of cargo, from RoRo to containers to break and liquid bulk. The port has witnessed 14% growth in cargo traffic this year and a 7% increase in container traffic to and from India. As one of the largest European port systems, HAROPA has about 500 hectares of available land and estate reserves along the Seine corridor. It helps its customers in setting up and managing a competitive and sustainable logistics system to serve the European consumer basin that has 25 million inhabitants.

HAROPA follows an integrated sustainable policy of development which is based on three factors: Social Development, Economic Development and Environmental Development

Environment Friendly policies

By law, French ports are required to mandatorily practice sustainable development. All the stakeholders are also required to work jointly and take equal responsibility towards

There are many port projects coming up in India. However, some projects get stuck up due to environment clearance issues or objection from local communities. Considering this backdrop, Mr. Sebastien Roux, explained some strategies help to overcome such issues and how ports can take green initiatives. His views may also help in analysing the socio-economic cost-benefit for port projects in India

sustainable practices.

HAROPA is currently investing in infrastructure activities like multimodal facilities, new rail connections, developing new waterway connections and green technology. When working on developmental projects, they consider the following:

- Environmental impact of the new project in terms of emissions and carbon footprint.
- Operational impact due to increased traffic.
- Benefit to the customer and scope for customised services.
- Reduction of inconvenience that may occur to the inhabitants affected by the project.

They have a very efficient cargo delivery system created by SOGET, which is fully paperless and facilitates full custom clearance within five minutes. With this integrated platform they have brought together port authorities, industrial bodies, customs authorities, public administration bodies, regulators, freight forwarders and customers.

Green initiatives

HAROPA aims to be a stimulator for green initiatives and is making continuous efforts to reduce emissions and manage waste.

Major chunk of container traffic is transported by inland waterways instead of roadways to avoid congestion. HAROPA also generates clean energy through offshore windmills. They encourage environmentally responsible behaviour amongst shipping lines by giving financial rewards and subsidies to the shipping line with least emissions. They also encourage cruises and shipping lines to use bio-diesel.

In his concluding remarks, Mr. Sebastien Roux said that HAROPA is also taking all efforts to improve its image amongst the society at large. This image helps provide various environment-friendly and customised logistics solutions to their customers. Indian ports may follow some of these practices and thereby achieve a competitive advantage.

Defense Logistics



Rear Admiral Sudarshan Y. Shrikhande
AVSM, Indian Navy (Retd)

Rear Admiral Sudarshan Shrikhande initiated his address by stating that as a naval officer, he enjoyed a career filled with adventure and uncertainty. He shared some highlights of his dynamic career at sea and furnished insights about the unique nature of defence logistics.

He mentioned that the Indian navy uses facilities of commercial ports and the coast guard, wherever a naval base is not available. Similarly, Indian naval ships visit foreign countries and explore the opportunity of cooperation in international waters. Recently, Oman had given access to the Indian Navy to use its Duqm port. This is India's strategic reach in the Middle East in order to protect its interest in the Indian Ocean. By having more such alliances, the Navy has been able to combat pirates in the Indian Ocean region

as well. He also gladly mentioned that the Navy is proud of its alliances with Ports and can always count on the Indian Maritime sector for their support.

He further added that like a serpent, an army moves on its belly. A robust supply chain is the belly of the army. For any defence force, strategy determines the end goal to be achieved and logistics enables the means to achieve this.

Defence forces undertake huge logistics tasks to sustain themselves. For them fuel, lubricants, rations, medical aid, spares, repairs, weaponry and mules all form part of logistics. Their requirements need to be made available through jungles with heavy rain, deserts, freezing mountainous regions, terrain devoid of roads and tracks, as the case may be. For example in a war there may be sudden need for replenishing weapons, rescue vehicles, additional forces, food supplies and so on.

He added that there are certain unique characteristics that govern defence logistics:

1. Can do approach' to problem solving
2. Prompt response in humanitarian assistance and disaster relief
3. Replenishment of stocks of perishables and essentials in good time in an emergency
4. Uncertain and unpredictable working environment
5. Inventory management and control



6. Reduction of logistics cost and wastage
7. Use of Data for decision making

He concluded his speech by stating that defence logistics is much more complex than commercial logistics as it cannot be anticipated in advance. Defence forces cannot rely on any other source and has little luxury of just- in- time delivery. Defence logistics is also the heart of any battle which can determine victory or defeat.



Dr. (Cdr.) Arnab Das
Director, Maritime Research Centre

At the outset Dr Das. reinstated certain points brought out by Admiral Shrikhande. He then commenced his presentation by mentioning that new guidelines have been laid out to protect the Indian Ocean under the 'SAGAR' (Security And Growth For All In The Region) framework. Under this framework, security is given prominence and recognition is given to the strategic importance of logistics in the Indian Ocean Region (IOR).

Earlier, internal and external security was handled separately by various departments at various levels. Under SAGAR, these would get merged with each other and be regulated by a new entity namely, Ministry of National Security. The merging of internal and external security for enhanced coordination is critical.

He also focussed on the geopolitical aspects

and implications of SAGAR. Geopolitics and terrorism are posing major hurdles for the defence forces. Defence budget is also not going to increase substantially in the years to come. Hence there is a need for more efficient utilization of available resources. Earlier, new technology came from defence forces. But today Google, Amazon and various other organisations are providing novel technology in logistics.

Technology & Artificial Intelligence are globally acknowledged game changers. However migrating to these new platforms will require massive infrastructure investment and skilled man power across sectors. One way to deal with this is consolidation across agencies and functions for information exchange. An example of rapid technological advancement is Israel, which is the first country to use fully automated robots and defence vehicles.

The government has also taken initiatives to encourage Public Private Partnerships to boost maritime infrastructure. GST has been the most significant structural transformation in recent times.

He concluded by mentioning that India has a roadmap in place but having a roadmap is not enough , there needs to be implementation and evolution in order to facilitate a defence ecosystem.

Maritime Safety and Risks in the Logistics and Maritime Sector



Capt. Ashok Mahapatra
Ex-Director,
International Maritime Organization

Capt. Mahapatra initiated his address by throwing light on the initiatives of the Maritime Safety Committee within the International Maritime Organisation (IMO). This committee has been drafting guidelines for the safety of seafarers, cyber safety, safety of marine environment and future safety preparedness. There is always a certain measure of risk associated with maritime activities and these can be minimized by preventive safety measures.

Cyber Crime and Safety

Recently Maersk line was under cyber attack from hackers who disrupted their entire global operations. Cyber crimes are rampant across sectors. Solutions to such issues need to come from the industry rather than regulators. To avoid cybercrime, one requires quality assurance and quality audits of the IT systems used.

Another innovation known as Global Maritime Distress and Safety System (GMDSS) has been released recently which is modernising the way Big Data moves across the shipping world. All information and communication is routed through International Maritime Satellite Navigation (INMARSAT). This system will process

e-data across globally and help to make prompt decisions. A sub-committee of IMO is drafting new guidelines for GMDSS.

IMO is also looking to standardise the reporting systems for Port Community Systems and e-solutions. This will be a boon for seafarers as it reduces their administrative burden and allows them to concentrate on safety.

Regulations for Safety

Capt. Mahapatra further added that IMO has been working on Regulation on Marine Oil Pollution (MORPOL), Ballast Water Management and Climate Change.

Autonomous shipping is slated to become future of the maritime industry. However there are few elements associated with unmanned ships:

- 1) Regulations for autonomous ships operating in the same environment as manned ships
- 2) How will unmanned ships respond to emergency situations and unforeseen circumstances at sea?
- 3) How will the settlement of liability happens in case of collision in international waters?

IMO is working towards bringing 170 member countries together to draft common ground rules for maritime safety for autonomous ships.

With those insights Capt Mahapatra concluded his presentation and urged the audience to visualize the future of maritime safety and ascertain the direction that it would take.



Mr. Sanjiv Singh
DGM, New India Assurance Company Ltd.

Mr. Singh raised the importance of risk management and the quantum of losses that may arise out of such risks. He focussed on how risks can be minimized and adequately covered. Maritime safety is an essential preventative measure, but what happens when peril strikes at sea. He sighted the example of Costa Concordia, the Italian cruise ship that capsized after striking an underwater rock. The collision resulted in thirty two deaths and caused two billion dollars in liabilities and losses. Risks of such magnitude would have led the cruise company to go bankrupt had their risks not been covered.

There was a lightning some months back at Jawahar Dweep island. Hundred crores worth of property and goods were destroyed. There was also a collision between two vessels in Chennai port which resulted in a hundred and sixty crore loss to the damaged bunker.

Types of risks that covered under marine insurance

Mr. Singh classified the types of risks covered:

- 1) Physical loss of property and belongings
- 2) Contingent Losses
- 3) Third Party Liability

All the terms and conditions of coverage need to

be understood by the insurers in order to have a seamless cover that takes care of all contingencies. He cited the example of another collision between two vessels MV Chitra and Khalija, wherein the Indian exporter lost his money as the foreign buyer refused to accept cargo that had been subject to an accident. The exporter didn't have a seller's interest cover which led to huge losses.

Maritime sector to see a new sunrise

Mr. Singh expressed that the government is showing great enthusiasm in a 'Blue revolution'. There are massive investments to the tune of Rs 8 lakh crores in ports, shipping and logistics sector. Some of these initiatives include Sagarmala, promotion of inland waterways, Bharatmala, Make in India, Digital India, infrastructure augmentation, setting up of a separate logistics division under the Ministry of Commerce and so on. All these initiatives carry risks associated with them and the Insurance sector will be present to cater to these risks during this period of revolution and beyond.

New IMO guidelines a boon for the insurance sector

Mr. Singh concluded by mentioning how the new IMO guidelines would help to reduce risks and the liability of insurers. Carriers mandatorily weigh goods and take a declaration of the nature of goods (whether hazardous or not). Finally he said that the insurance industry is able to cover risks at reasonable costs, thereby preventing businesses from getting crippled.

Panel Discussion on 'Customer Centricity'



Panelists (from left to right):

Mr. Deepak Shetty, Retd. IRS, (C&CE-Retd.), Former Director General of Shipping & Secretary to the Govt.

Mr. Prem K Verma, Project Leader - Logistics Strategy, Tata Motors Ltd.

Mr. Umashankar Vadrahally, Asst. Vice President-Terminal Operations, South Asia, TOTAL Oil India Pvt. Ltd.

Capt. Swaminathan Rajagopalan, Commercial Director, CMA-CGM

Mr. Zarir Langrana, President - Global Chemicals Business, Tata Chemicals Ltd.

The Panel discussion on "Customer Centricity" was chaired by **Mr. Deepak Shetty**, Retd. IRS, Former Director General of Shipping & Secretary to the Govt of India, who flagged off the discussion by highlighting the various components that constitute a customer centric ecosystem.



According to Mr. Shetty, we are in the midst of a knowledge explosion. The new digital economy is shaping the world and the way we conduct business. He stated that the customer is God, therefore when it comes to service delivery standards, organisations must not only preach but practice excellence. There needs a focus on maintaining service timeliness and scaling up operations, which will bring with it a host of benefits.

He further explained that there are two critical elements of a customer centricity - passion towards one's own staff and value creation for all stakeholders. Adoption of such ethos and sustainable business practices will lead to a dedicated and motivated workforce and increased value for the organisation.

He also pointed out that we are highly cost ineffective as a nation. According to a



government report, our logistics cost is around 14.4% of GDP as compared to 8% logistics cost in China. We need to work smartly and effectively to reduce this cost down to 10% by 2020. For this, we need to be fully aware of new disruptive technologies around us. In the near future there will be three new paradigms for logistics namely electronic vehicles, personalised rapid transport (PRT's) like hyperloop and smart shipping management. One needs to run a simulation of what the future holds and how the financial architecture would evolve. It will help to understand if we are poised to take on future challenges and help prepare an action plan at micro and macro level.

Mr. Prem K Verma focused on the Indian automobile industry, and the issues arising from associated logistics cost and GST.



He said that the contribution of the automotive sector towards industrial GDP is 27% while contribution to manufacturing GDP is 50%. This sector currently employs 2 million people directly and 30 million people indirectly. India already has an Automotive Mission Plan (AMP) in place by which it plans to be 3rd largest automotive country in the world and create 65 million jobs. However, this plan has its own challenges and opportunities. Indian automobile sector has been hugely dependent on its internal consumption story so far. If India needs to grow then we need to become a manufacturing hub and have mass exports worldwide.

Earlier Indian automobile manufacturers were quizzed on their capacity to deliver scale and quality . However, today this Impediment has shifted from quality and capacity to logistics which means costs and timelines. Logistics cost is high in India because of wastage of resources along the supply chain. Multimodal transport is also not the way it should be in India. Multi modal also includes what we do for the first mile and last mile.

The multi-modal transport system should be an integrated business process that incorporates end to end service beginning from the first mile to the last mile in trade. However there are multiple GST rates for such transport operators.

GST on first mile of transportation is charged anywhere between 5 -12 %, storage and handling at the port charged at 18%, ocean freight is charged at 5%, while the last mile is pegged at 12%. It is difficult for a Multi-Modal Operator to adjust with this variable GST, thereby reducing efficiency. Mr. Verma presented an industry perspective of the the Indian automobile industry as a customer of the maritime services sector.

Mr. Umashankar Vadarahally, highlighted the importance of safety mechanisms at ports while handling hazardous cargo. According to him, while infrastructure development, port connectivity and seamless logistics are important, we also have to plan for emergency situations while handling hazardous cargo, on priority basis.



New types of hazardous cargo are being imported and exported everyday. LPG imported into India is roughly 11 million metric tonnes per annum. The question remains “Are we prepared to handle such volumes safely?” Even though the manufacturers and importers are aware of the perils of such cargo, port authorities and port staff is not fully trained to handle emergencies. Having attended emergency drills at ports, he felt that the port staff continue to deploy traditional techniques to battle emergency irrespective of the nature of cargo. There is need for adequate training to enhance safety preparedness at ports. Such measures will only lead to sustainable practices at par with international standards.

Capt. Swaminathan Rajagopalan, focused on why shipping lines need to differentiate their products and offerings from others.



He said that presently the global shipping industry is witnessing huge consolidations with many shipping lines opting for mergers and acquisitions. Some examples are the takeover of United Arab Shipping by Hapag Lloyd, the Hamburg Sud-Maersk alliance and so on. Almost every shipping line has entered into vessel sharing agreements (VSA's) with its competitors to share its services and achieve operational efficiency.

Service level is one of the most important factors as far as the transportation industry is concerned. In a standardised operating environment, how does one shipping line

differentiate its offerings from the others. The only way is to offer value added services based on customers needs. Digitisation is a must in order to grow and sustain. Digitisation is present in every step right from generating quotations to bill of lading to issuing the delivery order. Another focus area could be to achieve energy efficiency and productivity by adopting new technologies and larger size of vessels.

Essentially, shipping lines have to go beyond just serving traditional maritime scope of activities. They would have to evolve and cater to first and last mile connectivity, protection of cargo, personalised services and so on in order to become a fully customer centric organisation.

Mr. Zarir Langrana shared interesting insights about the Indian chemical industry. He stated that the Indian chemical industry today is a 150 billion dollar industry and the third largest in Asia. It is slated to grow upto 400 billion dollars by 2020.

International trade in and out of India is estimated at 65 billion dollars. Currently this ratio is skewed towards imports which continues to grow at 10-12% per annum. Increased international trade will demand more deliverables from its supply chain and logistics infrastructure, which will need to be more cost effective and efficient.



From a customer standpoint, there are some key parameters that lead to a great customer experience.



They are:

- Simplification and transparency of procedures
- Exceptional service at low costs
- Agility and speed, in terms of movement of goods, transmission of data, processing of documentation and so on
- Value added services as a part of the core product offering going forward

- Safety of health & environment across a highly fragmented value chain

These parameters can be achieved by four platforms namely integration, innovation, technology and sustainability. India needs to look ahead and prepare for the future rather than closing existing gaps.

Key Takeaways

- Logistics cost needs to come down to 10% by 2020.
- There is a huge scope for customer centricity through digitization.
- Shipping lines needs to focus on energy efficiency and productivity.
- Value added services would be part of core offerings going forward.



Panel Discussion on ‘Seamless Logistics through Infrastructure’



Panelists (from left to right):

Mr. Manish Saigal, Managing Director, Alvarez & Marsal, India

Mr. Steve Felder, Managing Director- South Asia, Maersk Line India Pvt. Ltd.

Mr. Mahmood Al Bastaki, Chairman, Dubai Trade, Chief Operating Officer, DT World; DP World

Mr. Gurpreet Singh Gill, Regional Head - Supply Chain & Logistics Solutions, Samsung SDS

The panel discussion on “Seamless Logistics through Infrastructure” was chaired by **Mr. Manish Saigal**, Managing Director, Alvarez & Marsal, India. In his opening remarks he stated that in today’s world every customer is looking at three expectations from service providers namely : 1) Speed 2) Reliability and 3) Lowest possible cost. Integration plays a key role in optimising the balance between these three expectations.



India has had a history of cumbersome tax regimes and inadequacy in road, rail and port infrastructure. Infrastructure needs to be designed in a manner that will provide solutions to these objectives. A customer does not bother about which mode of transportation is used. He is concerned about cost, safety and timely delivery of goods. It is often seen that the ‘last mile’ cost in India is equal to the ‘port to port’ cost. The delays happen at the point of handover when switching from one mode of transportation to another. Multimodal logistics parks and integrated technology would probably reduce the issue of handover wastage. For this to happen the role of logistics companies needs to evolve and they need to start operating as a single window offering end to end connectivity. He stated that with proper planning and foresight these gaps can be bridged.

He then invited the panel members to express their views on the subject.



Mr. Steve Felder initiated the discussion by suggesting a few pointers to alleviate the bottlenecks in both physical and digital infrastructure in India.



He stated that logistics will always be crucial as it is a key enabler of international trade. International trade contributes to 60% of global GDP. He pointed out that India's share in global trade is only 6% and per person TEU is quite low considering that India comprises 15% of the total world population. This represents huge potential for India to increase its share in global trade. If logistics cost in India can be reduced by 10%, then it would free up 5.5 billion dollars of capital and help increase trade by 5-8%.

Some factors that hinder seamless logistics are inadequate road and rail network, bureaucratic delays, inadequate last mile connectivity out of ports and a fragmented industry. These issues can be addressed by holistic planning, fast tracking infrastructure projects and digitization.

Mr. Felder further said that industry should partner with the government to push for swifter implementation of projects like Dedicated Freight Corridors, Sagarmala and Bharatmala. Rail-road connectivity should be a priority for seamless logistics. Deepening drafts at major Indian ports is also critical for accommodating large sized vessels. Vessels with 22,000 TEU capacities have already been introduced in Europe. The main benefit of such mega ships is economies of scale and when such ships meet

optimal demand, the benefits of lower costs can be passed on to the importers and exporters.

There is a need for mega data that everyone subscribes to including government authorities, shipping lines, logistics players and customers. For this purpose Port Community Systems need to be expanded to include all stakeholders. He quoted the example of the Maersk-IBM partnership, by which they plan to digitise their global trade through blockchain and cloud technology.

He concluded by saying - India can provide efficient logistics infrastructure by leveraging both physical & digital infrastructure. India needs to push a series of incremental improvements to make a quantum leap in this direction.

Mr. Mahmood Al Bastaki stated that India has everything to be the next superpower and that India already knows what it needs to do. Only question is how to do it and who will do it.



He mentioned that the UAE government is presently making big investments in India. Foreign trade between the two countries couple of years back was close to 60 Billion USD and this figure is estimated to touch 100 billion by 2020. Recently, Indian Prime Minister Mr. Narendra Modi had visited UAE whereby he mentioned that there should be minimum government and maximum governance for seamless logistics to occur. There should be an emphasis on minimizing the touchpoints and documentation for customers along the supply chain.

For India to go to the next level, it needs to create an empowered entity that can orchestrate seamless logistics. The entity should be empowered enough to alter the current processes by eliminating and merging procedures wherever possible. Seamless logistics should not be restricted to an IT project. It's a business transformation which involves re-engineering and change management.

An integrated logistics system is also essential to reduce the blame game, whereby terminal operators blame shipping lines, shipping lines blame Container Freight Operator (CFS), CFS blames the freight forwarder and so on. India may consider making some bold changes and eliminate certain stakeholders along the value chain for larger good.

He concluded that the Customs has a very valuable role in facilitating trade in the country. He mentioned that he liked the name given by Customs to its internet-based cargo processing system called "ICEGATE". Its a unique name and as the name suggests, the Customs should be 'an ice melter and not an iceberg', thereby paving the way for future international trade.

Mr. Gurpreet Singh Gill started off his presentation by defining the problem statement which focuses on "how to optimise infrastructure and what goals need to be set in order to compete in the the international market".



He added that there is a lack of communication between infrastructure oriented parties

due to non-integration because of which, goods do not reach the right place at the right time. This in turn impacts customer's buying decisions and business profitability. There is also no uniformity in infrastructure facilities throughout the country. Some ports are well developed while some still operate on outdated business models. Some locations have great warehousing facilities whereas some areas lack basic storage. He expressed the need for a more balanced outlook and plan.

Today, most organisations work on Electronic Data Interface (EDI) information for decision making. EDI is becoming primitive as it gives information pertaining to single cases. Blockchain technology is the way forward and is a new integrated version of EDI and IOT. This common digital platform integrates all related parties such the shipper, third party logistics, Customs, port authorities and so on. Blockchain technology uses a unified ledger to store data and information. This ledger is open to all stakeholders and accessible by importers and exporters. Such a system leads to more effective decision making and resource management.

He also highlighted that a consortium of 41 global organisations has been formed and they have been successful in running blockchain powered services. It is a proven concept now but needs to be explored more. Though the blockchain model for supply chain & logistics will be a private consortium (where one defines who is supposed to share how much information), it will still be a challenge to get organisations to share information. However by establishing trust and a secure digital environment, he hopes to see the widespread use of blockchain technology in the maritime sector, leading to seamless logistics.

Panel Discussion on 'Changing Business Models and Innovation in Logistics and Maritime Sector'



Panelists (from left to right):

- Mr. Sanjay Tiwari**, Global Head of Sales, Maersk Trade Finance
- Mr. Sourav Sadhukhan**, Head of Cranes Centre of Competence & Vertical Manager Ports, Siemens India
- Mr. Anant Swarup**, Joint Secretary (Logistics), Ministry of Commerce, Govt of India
- Capt Ram Iyer**, Senior VP, Seahorse Ship Agencies Pvt Ltd.
- Mr. Sudeep Mehrotra**, Senior Director, Alvarez & Marsal India
- Capt. Nikunj Parashar**, Founder, Sagar Defence Engineering
- Mr. Gem Beemsterboer**, Director of Operations, Port of Amsterdam

This panel discussion was chaired by **Mr. Anant Swarup**, Joint Secretary Logistics, Ministry of Commerce, Government of India. In his opening remarks he mentioned that this is the first time the government has realized the importance of logistics and has created an exclusive new department within the Ministry of Commerce for integrated development of the logistics sector in India.

He further explained that there are four 'I's in logistics and these parameters will lay down the guidelines for the Logistics Department :

- **Infrastructure** - This includes integration of physical and digital infrastructure. He highlighted that the Logistics Department is preparing an action plan to meet growing demand for the next 10 years.
- **Interconnectivity** - Seamless logistics will not just include seamless movement of goods but also include seamless movement of documents and processes.



- **Intelligent System** - Government will create a single portal, like an e-marketplace to cater to all logistics needs in the country. They will also have data centers that will capture data and help in decision making.
- **Innovation** - Use of innovative tools to solve logistics problems in India.

Mr. Swarup further believed that the above mentioned 4 “I”s are not possible without a fifth ‘I’ which is “involvement”. The involvement of the government, academia, public sector, corporate and various other stakeholders is also a critical factor for success. With these words, he opened the panel discussions and invited the panel members to provide their inputs on the subject.

Mr. Sanjay Tiwari initiated the discussion by referring to opinions of earlier panel members. He mentioned that the earlier panel members focused on international trade and structural changes in the shipping business.



He said that there needed a shift from focussing on supply chain to value chain. Value chain is more selective and requires more thought as roles in the value chain are changing dramatically in today’s times. Organisations such as Amazon and Google have very successfully created exceptional value chains. Amazon may become a shipping line or an airline in future. It already leases 23 airlines to fly its cargo.

Organisations are expanding to various roles.

Maersk which is traditionally a shipping line, now provides trade finance to bridge the funding gap. By doing so, they are increasing value to their customers.

He then concluded by saying that a demographic shift is already taking place in India, which will lead to a huge shift in economic power in future. He feels that this is a very exciting time to do business and also for professional growth.

Mr. Sourav Sadhukhan shared with the audience the new innovations in material handling.



He stated that a number of intelligent “Ship to Shore” operating systems have evolved at container terminals, which give consistent performance with minimal scope for error. Siemens has already entered into digitalization. The automated terminal operating systems operate without any human intervention by analysing past patterns through AI and machine learning. The system captures all this information on Cloud platforms for effective decision making. For example Quay Cranes handle skewness of cargo, load, location of cargo without any operator assistance. They are also able to place the containers on the truck and guide trucks to the docking point. Only in case of deviation in pattern does the machine ask for operator assistance.

In India, DP world has adopted a remote controlled operating system, wherein real time information is available on the desk and all safety parameters are taken care of. Mr. Sadhukhan



concluded by adding that scaling up Indian ports must be a top priority and Siemens is equipped to help to Indian container terminals adopt to new technology, at par with global ports.

Capt. Nikunj Parashar pointed out that ports-shipping, aviation, road, rail, multi-modal transport are all part of logistics. However the maritime side of the logistics chain is very different. This industry is more conservative and does not change at the pace of the aviation sector for example. Today, logistics costs have come down but we do not exactly know if this is because of larger size of vessels or reduced oil prices. The customer only looks at the value derived from the supply chain.



Larger sized ships carry five times more cargo than normal ships. Huge money has been invested in launching numerous such ships into the market and they will remain in operation for the next 20-30 years. As terminals get automated, how does one bridge the gap between the existing ships and advanced futuristic terminals. This is where Sagar Defence engineering comes into picture. They have developed a technology by which they can convert existing vessels into autonomous ships, and bridge the technology gap whenever required.

Mr. Gem Beemsterboer mentioned that India could certainly use the experience of the Dutch and other European countries in the maritime space. The Dutch ports have to constantly strive to develop smarter and greener

port infrastructure in order to keep their operating licenses valid. Dutch ports are the drivers of the Dutch economy and they take steps to ensure their continuous growth.



Dutch ports invest heavily in technology and renewable energy. They have solar panels and windmills to produce energy. They also try to use waste to generate power for their plants. They have come up with the decision to host technology startups in the port premises in order to find hi-tech solutions to efficiently handle present and future capacities. They have used AI to predict when a ship will enter & leave the port, for triggering safety alarms when required, detecting where maintenance is required and so on. AI and machine learning is also used to analyse data to improve service to customers.

He expressed the willingness of the Port of Amsterdam in sharing it's experiences and lessons in areas of port planning with Indian Port operators.

Mr. Sudeep Mehrotra highlighted that there are lot of discussions in boardrooms regarding the latest changes in the maritime industry. The pace at which these changes are happening are rapid and faster than ever. There are also debates as to what changes are relevant to their organisations and what is the cost of transformation and learning.

The informed that the road transport industry is currently a 80 billion dollar industry. The biggest load aggregators these days are not



fifty year old established companies, but new companies that are not more than 3-5 years old. These companies are employing latest technology to reduce costs and to increase their speed and productivity. Innovation in the road transport segment, which is the largest logistics

segment in India, is already witnessing a transformation.

He also stated that presently India has a capacity of 600 million square meters of warehouses out of which 150 million square meters are already nine meters high. Total of 300 million square meters of warehouses are expected to be nine meters in height within the next three years. This means more use of automation and Warehouse Management Systems (WMS).

He concluded by stating that the choice for organisations today is between acquiring new technology or losing out on market share. As more and more infrastructure gets added, the business model that will stand out and survive is the one that can successfully integrate logistics with value added services.

Takeaways

- There are five I's for logistics Improvement : Infrastructure, Interconnectivity, Intelligent Systems, Innovation and Involvement.
- Innovation is no longer a choice but a necessity.
- Focus will shift from supply chain to value chain.
- Business models that will survive will be the ones that can successfully integrate logistics with value added services.

Summary of the proceedings and Vote of Thanks



Mr. S. Hajara

Ex-CMD, Shipping Corporation of India

Mr. Hajara summarised the conference deliberations that occurred during the course of the day.. He underlined the importance of supply chain and logistics as “Logistics is the engine oil for growth of the world”. He further added that the point of origin and point of consumption of goods and services are miles apart in majority of the cases. An effective supply chain is integral in connecting demand and supply, and also in making the world a smaller place today. He listed some of the key takeaways such as scale of operations, integration of platforms, relevance of re-engineering, technological advancements, change management and talent management amongst many others.

On behalf of the Bombay Chamber and Advisory Board for the Conference; Mr. Hajara thanked all the partners, specially MbPT and Costa Cruise for making the event a great success.

He proudly reinstated that shipping is an integral part of logistics and without shipping, we would not have the world that we live in today.



Plenary Session



(L to R)- Mr. F. N. Subedar, presenting memento to Mr. Neeraj Bansal, IRS.



(L to R)-Mr. F. N. Subedar,presenting memento to Dr. Malini Shankar, IAS



(L to R)
Capt.Avinash Batra, presenting memento to Mr. Sebastien Roux



(R to L) - Mr. S. Hajara presenting memento to Mr. Himanshu Shekhar



Audience of Port, Shipping and Logistics Conference 2018



(L to R)
Mr. Manish Saigal, Mr. F. N. Subedar,
Dr. Malini Shankar, IAS



Employees of Bombay Chamber of Commerce and Industry

About Bombay Chamber

The Bombay Chamber is one of the oldest industry associations in the Indian Sub-Continent. The membership consists of wide spectrum of industries. The Chamber closely associates itself with various industry bodies across the globe. It advocates for various regulatory and growth related issues and provide a vibrant platform for trade and business development. A robust and objective consultation is at the heart of Chamber's advocacy.

The Bombay Chamber of Commerce & Industry was the first to organize an International Conference in India dedicated to maritime fraternity. We maintain our tradition of focusing on business growth and regulatory aspects.

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ORGANIZING TEAM:

(L to R)

Mr. Pravin Rane

Deputy Director, Bombay Chamber

Ms. Minal Khadilkar

Executive, Bombay Chamber

Ms. Anisha Raju

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