



Kale Logistics

Technology that Transforms



ClearView

A Kale Thought Leadership Summit for Air Cargo

Bangkok, Thailand | November 2018

Key Excerpts from the Summit



Synopsis

Dear Industry Colleague,

Greetings!

It was an immense pleasure to have you at the 'CLEAR VIEW – A Kale Thought Leadership Summit for Air Cargo' on 22nd and 23rd November 2018 at Royal Orchid Sheraton Hotel & Towers in Bangkok, Thailand. This exclusive summit (by invitation only) has been a distinguished gathering of more than 30 CXOs from Air Cargo Ground Handling, leading Airlines, renowned consultants and representatives from international trade bodies like TIACA and IATA.

This year's edition of CLEAR VIEW focused on Air cargo handling infrastructure, Regulatory and industry initiatives, Trade Facilitation, e-Commerce & Air Cargo Handling and New markets and new horizons for Air Cargo.

The first and second edition of CLEAR VIEW summit took place in Dubai and Athens which were a great success, with top executives attending from IATA, leading Airlines, Cargo Handlers, Industry Associations, Regulators and prominent Industry Consultants from North America, Europe, Africa and Asia. The summit had four power-packed and focused discussions which yielded some very meaningful insights into the present and future Air Cargo industry trends. The summit sessions were designed to benefit the Cargo Ground Handling Agents (GHAs), Airlines and their ecosystem with an intent to raise discussions revolving around Innovation, Measuring performance for transformation, The Modal Shift, e-Commerce and Digital Disruption. This summit for the Thought Leaders of the Air Cargo industry is a platform to share their experience and knowledge around a focused discussion, where we go beyond the issues and seek to identify real-world solutions. We gather not to follow everyone's agenda but to exchange views and key learnings that drive value for the Future of the Air Cargo Industry.

It was a pleasure meeting you at the Air Cargo Thought Leaders' Summit in Bangkok, as we continued the journey with the objective to provide the industry with a 'CLEAR VIEW.'

Best regards,

Amar More
Director



Vipul Jain

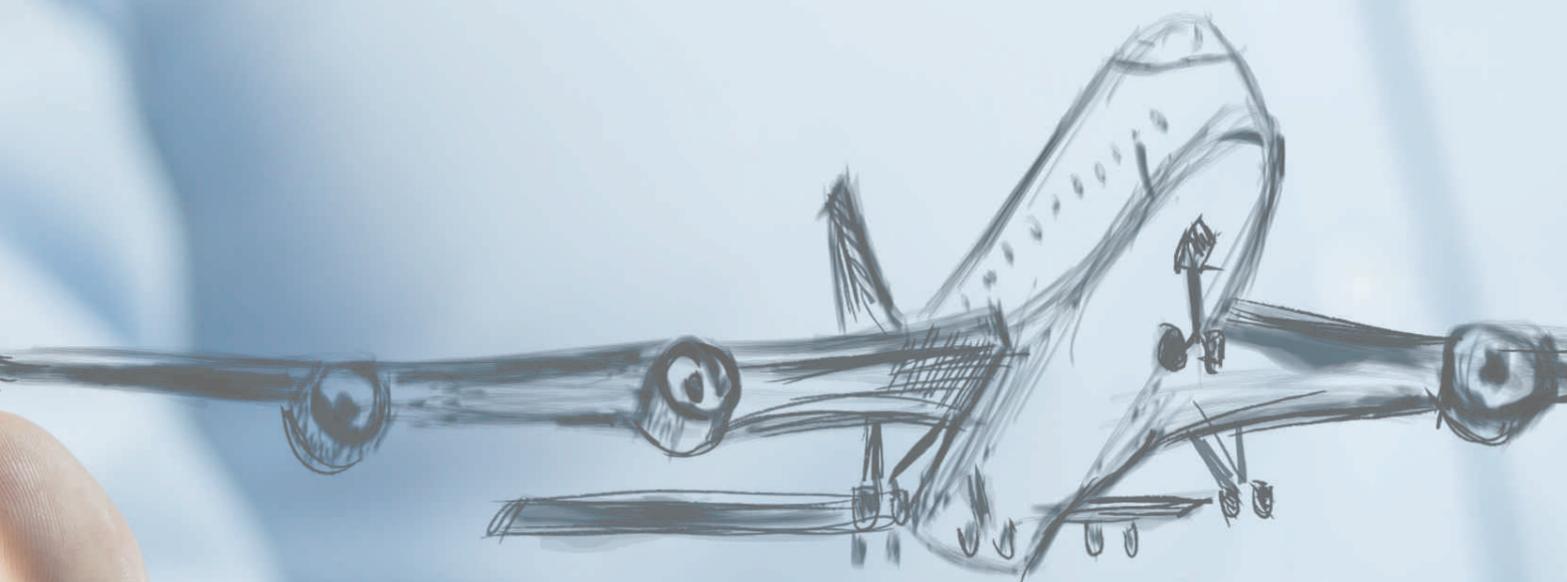
Chairman, Kale Logistics Solutions

The air cargo industry has grown by leaps and bounds in the last year. And the projections for the future are quite promising. There is a lot to gain from paperless air cargo, for all stakeholders of the air cargo value chain. A cohesive logistics system empowers collaboration and visibility, significantly decreases potential errors in planning and implementation, and leads us to the required goal: a fully data-driven industry. It is a known fact that the industry's supply chain is disjointed and siloed; assimilating processes and data, along with standardising and automating key procedures will present an attractive value proposition. e-Air Waybill streamlines the process, aims to enhance accuracy of data, safeguard confidentiality, minimise paper handling costs, and accelerate delivery times. Data-driven decision making takes the process a step further and enables the entire supply chain to access data required to optimise efficiency. So, going forward, each player in the value chain needs to become an active participant and evangelist for paperless logistics.

The next level of growth for the industry will necessarily include the development of cross-border paperless trade systems, which will empower electronic exchange of data and documents amongst stakeholders situated in different countries in the end-to-end value chain.

The journey forward for the air cargo industry, will likely be an amalgamation of trade facilitation and digitisation with paperless logistics setting the stage for the next growth trajectory. As always, technology has been and will continue to be an enabler in this process. Buzzwords such as Blockchain, Big Data and Internet of Things are now an integral part of the technology adoption plans of most air cargo players in the industry.

The clear objective of CLEAR VIEW 3.0, with industry experts and opinion leaders like you, is assessing and debating the scope of the challenges and opportunities facing the air cargo industry today and going a step ahead and charting the next growth curve. A unique platform such as CLEAR VIEW, gives us an access to decoding the air cargo sector in its entirety. If you were to glance at the CLEAR VIEW agenda, the sessions are designed to address the challenges and possibly create a knowledge bank. It aims to focus on global issues, come up with possible solutions, recognise opportunities and assess their potential repercussions. The ultimate goal of this summit is to gather industry insights to build a future-ready model after weighing in the present and future trends of the global air cargo industry.



SESSION 1: Air cargo handling infrastructure: looking back and ahead

Synopsis

The air cargo industry is facing serious challenges as it struggles to keep surging volumes flowing through its airports. The air cargo industry has not changed much in the last 40 years, it has remained static. Not only are many airports operating close to capacity with congested airfields, many of the existing facilities are ill-suited to the requirements of modern cargo traffic. The surge in traffic during the peak season overwhelmed airports, including some of the large gateways, exposing inadequate cargo capacity. Even the warehousing facilities are insufficient. With demand forecast to remain strong, the pressure will only increase in the near future.

IT and automation has had low adoption in the industry, proven IT systems to handle operations are missing. Along with lack of processes, there is insufficient and incorrect data available in the systems, which are complicating the operations. This is coupled with lack of interest by the airport. Locating cargo is big issue.

Another perspective is getting the right alignment in the supply chain and optimising of the existing facilities to derive value. Improve productivity and process efficiency to ensure utilisation of infrastructure to the maximum. A planned collaboration with the air cargo stakeholders along with proper mandates is the need of the hour.

However, the challenge goes beyond putting up additional square footage to accommodate larger volumes. Much of the existing air cargo infrastructure is inadequate to process the types of traffic that have risen to prominence lately, notably temperature-sensitive shipments and e-commerce. As an industry, we need to move ahead and respond to special business needs like pharma and e-commerce. Some of the way forwards are; change of stakeholder mind-sets, need for investments in technologies, stricter enforcement and higher standards from regulating bodies. The Air Cargo industry does not need a change but a revolution.





Vineet Malhotra

Director, Kale Logistics Solutions

Moderated by

Q

How important is the infrastructure and the concept of a modern warehouse?

A

Maarten Klijnstra: From an African perspective, during the peak seasons warehouses become chaotic, particularly at the higher demand cargo airports and, as more and more capacity is deployed, this becomes an increasing problem. It time to set-up new facilities. Asset utilization is the key here and we should look at smart cargo where we are able to handle volumes in and out in a very efficient way.

Kai Domscheit: In Frankfurt we have 9 different facilities with unique identities, some are new. For the old ones it is very challenging to put new technology and automation and is also inefficient to put money in them. The new warehouses have facilities like cross-dock and automation and were thought through while building. The other major challenge is resources using the facility, the warehouse is built with modern technology but the people operating it lack skills to run it efficiently.

P Balasubramanian: from an Airline perspective, a warehouse is a place where my cargo needs to spend the least time either receding from shipper to aircraft or aircraft to customer. It is not a money-making place, but a transit place for an airline. From a modernisation point of view as long as the efficiency the warehouse would offer at the equitable cost, the airlines would be convinced to pay the cost asked happily.

Q

How will Cargo look in 10 years from now?

A

Tushar Jani: We need to debate on the vision of how cargo will be handled 10 years from now. This industry has been influenced by many external sources; like the integrators, who showed how to handle IT, cargo and deliver it from point to point very effectively. Then there is e-commerce which is impacting the industry and may commoditise air cargo soon. Maybe in future, one could book airfreight from Amazon and get it delivered anywhere in the globe. Keeping all this in mind, we need to collectively ask 'What should be the infrastructure?'

In India there is a debate on cargo to be away from the airport where space is premium. There are examples from Hong Kong who is doing monthly cargo volumes which are equal to India's yearly volumes in built-up pallets. We need to analyse if that is a solution for developing countries. Changi airport of Singapore is putting up an airport terminal where only human being one will see is the Customs officer. Does this raise the question of ground handling business being finished? We need to devise a model for developed countries, developing countries and underdeveloped countries. Let's take a full view about the future; robotics, RFID or moving cargo away from the airport.

Steven Polmans: From the last 30 years nothing has changed much in the industry. We really need to change drastically, it just not digitizing the papers but digitizing everything possible we are doing today. We need to look at the entire supply-chain ecosystem and change how we work with it in isolation.

Q

What is the Freight Forwarders think about infrastructure?

A

Anusorn Lovichit: As a freight forwarder, we are more keen on the costs associated and I think it is the land-owner (airport authority) who controls the entire cargo community. As they are only landlords, they don't want to change. It is important for this authority to have the right vision to change.

Q

Is change really needed or are we doing fine?

A

Massimo Roccasecca: Despite of our greatest effort and intention to develop and revolutionise the industry, we are sitting in the same position as 20-25 years ago. I would love to see a revolution but in practice I have my concerns, our industry as compared to the integrators is more complex, every stakeholder addresses different customers; for an airline it is the freight forwarder, for an airport it is the airline, for the handler it is the airline and forwarder. Working in silos is a constraint of this industry, but there no escape as everyone has his own interest. I agree that airports should not be constructing a cargo building, but at the end, it is the airport who is making the investment and they build this infrastructure, which do meet the demand of the market.

Denny Fikri: Airports do not have the expertise on the flow of the cargo. As we are amidst building a new terminal, there is a lot of thought around e-commerce and integrators. Integrators are getting powerful; they are collaborating with airports and airlines. We are planning to give them dedicated lines, facilities outside the terminal and direct access to the terminal. E-commerce, pharma, perishables, high-value cargo are very important for us, as they are getting bigger.

Key takeaways:

- Collaboration required amongst supply chain members and sharing of data
- Changing the attitude of people
- Role of regulators to mandate standards and processes
- Optimal utilization of existing resources with IT and automation

SESSION 2: Regulatory and industry initiatives: Taking stock

Synopsis

The Air Cargo Industry has a reputation for reacting very well to regulations imposed by regulators. It does not do so well in non-Regulatory process improvements. Like, in 2011 when the EU ICS / ECS ACI went into effect. There was a very short implementation timeframe. In spite of it, all Supply Chain Members were ready and successfully implemented the program, on-time.

At the recent IATA Digital Conference held, the main theme was, connect, collaborate, modernise. Focus was placed on; e-freight - to go paperless, One Record - to move to smart data sharing, Interactive Cargo - to make cargo talk, and Cargo Connect - to simplify air cargo connectivity. Discussions on Blockchain, Artificial Intelligence and Machine Learning were also held.

The industry is also proactively taking initiatives on e-freight, e-CSD, digitisation, interactive cargo. IATA announced that the electronic Air Waybill (e-AWB) will become the "default contract of carriage" for all air cargo shipments on enabled trade lanes effective 01 January 2019. This directive encourages all air cargo industry stakeholders to switch to e-AWB at the earliest unless a paper air waybill may still be required due to applicable international treaties, national law, or as bilaterally agreed between the parties.

Regulatory challenges have long been felt in the air cargo industry, with overzealous rules and laws hampering profitability and a maze of varying standards throughout the world complicating communication and compliance. Yet the call today is for smarter regulations – not necessarily stricter or more prevalent.

The industry is truly at a crossroads be it from the industry perspective or the regulatory perspective. The key question is do we (as an industry) have a say with the true regulators? From the regulatory involvement, initiatives, collaboration point of view, they (the regulators) need to see this industry as an important industry, one that contributes to the GDP.

Regulatory changes are now starting. The industry must be ready as compliance will be A Must.



Hans van der Zwet

Director, Sweet Hill Consultants

Moderated by

Q

Are we XML ready?

A

Patrick Murray: No, we are not. Moving from Cargo-IMP to XML is a huge task which requires investment, but mostly airlines are still communicating via Cargo-IMP. We have to get there. Our industry is excellent in moving forward when there is a mandate and there is a consequence for not following the mandate. For our industry to move forward collectively we do need that bite, do need that threat behind. Standards are there, advantages are there, but the airlines and forwarders really need to push to get there.

Q

What does it take as a group to really push this forward?

A

Sam Okpro: The WCO have now accepted Cargo XML as the means. We also have IT suppliers who can help small and medium forwarders with whatever system that they have and convert it into a message that can be sent and received by anybody else. We will be getting there slowly, although it will not be as easy as we all think it should be.

Maarten Klijnstra: The capabilities are there. It will take as long as we allow it to take. If we require it to take four years before severe consequences, it will take four years. But it could be done in twelve months.

Q

Are handling companies here preparing budgets for this? Are you doing anything actively in this area, besides your normal day-to-day business activities?

A

Claudia Weidenbusch: No, honestly not, because we are waiting for this ability brought by IATA. For example, with some companies/airlines I can earn more money by making copies than handling. In my opinion, it's not just important to build within this network of cargo business but also within governance. You have to talk to the governments in your country otherwise without pressure by law or the governments we will never change anything.

Palaniappan: We all very well know the airlines are not providing enough information to Cargo-IMP or XML. So, we are trying to mandate it with the support of customs. We are trying to regulate an it by mid of next year. We expect everybody to provide information and we also give an alternate method where they can go to a community portal and capture that information which can be disseminated to all the parties. So today we need to provide an alternate means if we really want to get the information out.

Q

How are you dealing with this in India? Is Kale instrumental in getting this information from the forwarders?

A

Tushar Jani: I want to compliment Kale. They developed the first EDI platform with ACAA in 1990. It didn't go further, still struggling. But now we are at number 6 with e-AWB. That's a very good position as far as India is concerned. The government is now energising to build a community platform. The government has set up a logistics department. They are going to come up with a national portal of logistics. We are all now energised that we don't need the papers. We are getting there slowly.

Amar More: As Tushar Jani said ACAA tried doing this in 1990, it didn't go much distance. But then we tied up with ACAA in 2010, at that time India was ranked at 170 on e-AWB, now India is at number 6. So, it varies every month between 6 and 8 depending upon the number of shipments but in terms of adoption of technology it is much better than what we ourselves expected. And the big push came from the regulators. It was not Indian regulators but what happened in EU when this ENS and AMS started moving we saw the adoption moving 8 times in just a few months. So, it is definitely happening. In fact, it's a case study in Kellogg Business School's Supply Chain Management book, how it transformed from a typewriter-based market to a fast-growing e-freight market.

Key takeaways:

- Standards are there, advantages are there, but the airlines and forwarders really need to push to get there in being XML ready.
- It will take as long as we allow it to take. If we require it to take four years before severe consequences, it will take four years. But it could be done in twelve months.
- You have to talk to the governments in your country otherwise without pressure by law or the governments we will never change anything.

The implementation of the WTO Trade Facilitation Agreement (TFA), which entered into force in February 2017, is expected to generate reductions in trade costs of between 12% and 18% for countries and provide a much needed boost to global growth which should continue in 2018. The World Trade Organization (WTO) Trade Facilitation Agreement (TFA) is an instrument that promotes enhanced international trade through simplification of border management complexities whilst promoting the enhanced use of technology by customs administrations including the provision of advanced air cargo information to facilitate effective supply-chain security compliance. Air cargo will be a key beneficiary of an initiative looking to support developing countries implement the World Trade Organization (WTO) trade facilitation agreement.

The industry should recognize that transformation and industry success and sustainability can only be achieved through collaborative efforts. The implementation of Advance Cargo Information in over 60 countries has set the ground for better collaboration between states and regions. Initiatives such as Trade facilitation agreement aims to simplify the process for the air cargo supply chain. However, what other initiatives on the national, regional or local level could help facilitate trade? Trade single windows, Blockchain, Big Data are poised to enable collaborative cross-border trade. Aligning regulation and procedures with global standards and best practices has the potential to deliver major efficiency gains. That's the aim of the WTO Trade Facilitation Agreement which presents a great opportunity for our industry to reduce these delays and costs, particularly in developing countries.





Amar More

Director, Kale Logistics Solutions

Moderated by

Maarten Klijnstra: Markets are very much controlled by various regulatory organization especially the perishables. So, there is not really a e-marketplace between Africa and European countries. However, with technologies like Blockchain, common virtual interfaces, there is a good chance for multi-national e-marketplaces between Europe and Africa.

Key takeaways:

- One of the key challenges the industry is facing is of the mindset. If submission of document is digital, then there is no need to go face-to-face. When a person files export manifest in one country, the same info is filed in destination country, which creates duplicity. Digital Corridor negates this, smoothens the trade process, and brings transparency in place.
- All countries will have to put measures in place to improve the cargo flow to their course in a time-bound fashion. Measuring the efficiencies in airports, connecting the communities and eliminating the inefficiency we can achieve milestones in trade facilitation with support from governments and regulatory organisations.

Q

How Trade Facilitation can help facilitate trade across the world?

A

Tushar Jani: In logistics industry, we have 3PL,4PL, 7PL and now they are talking about 12PL. So where lies the challenge in digitalisation? Everyone agrees that in operations digitalization will help. All we need is a semi-integrator because if an integrator comes in picture he will charge \$5/kilo. So, somebody needs to step in and integrate all the information and give it to the customer, create a margin (10-20 cents per kilo), reduce the cost for the consignee down from \$5- \$10, it may not be next day morning, but it may be next day evening. The kind of freight cost it will save will be tremendous.

Dr. Emre Serpen: Moving forward, in air cargo industry, in terms of benefits, if we see at relationships of trade volumes and GDP numbers, one thing is very interesting, there is a new phenomenon, the relationship of traditional tracking and trade volumes have changed. In the global scenario, trade volumes are changed, if we compare 2017 to 2014, 100 points has increased. So that's the opportunity, when you get into that sphere, then we have different dynamics, in terms of pricing, terms of value, etc. In future, I see there is a great opportunity.

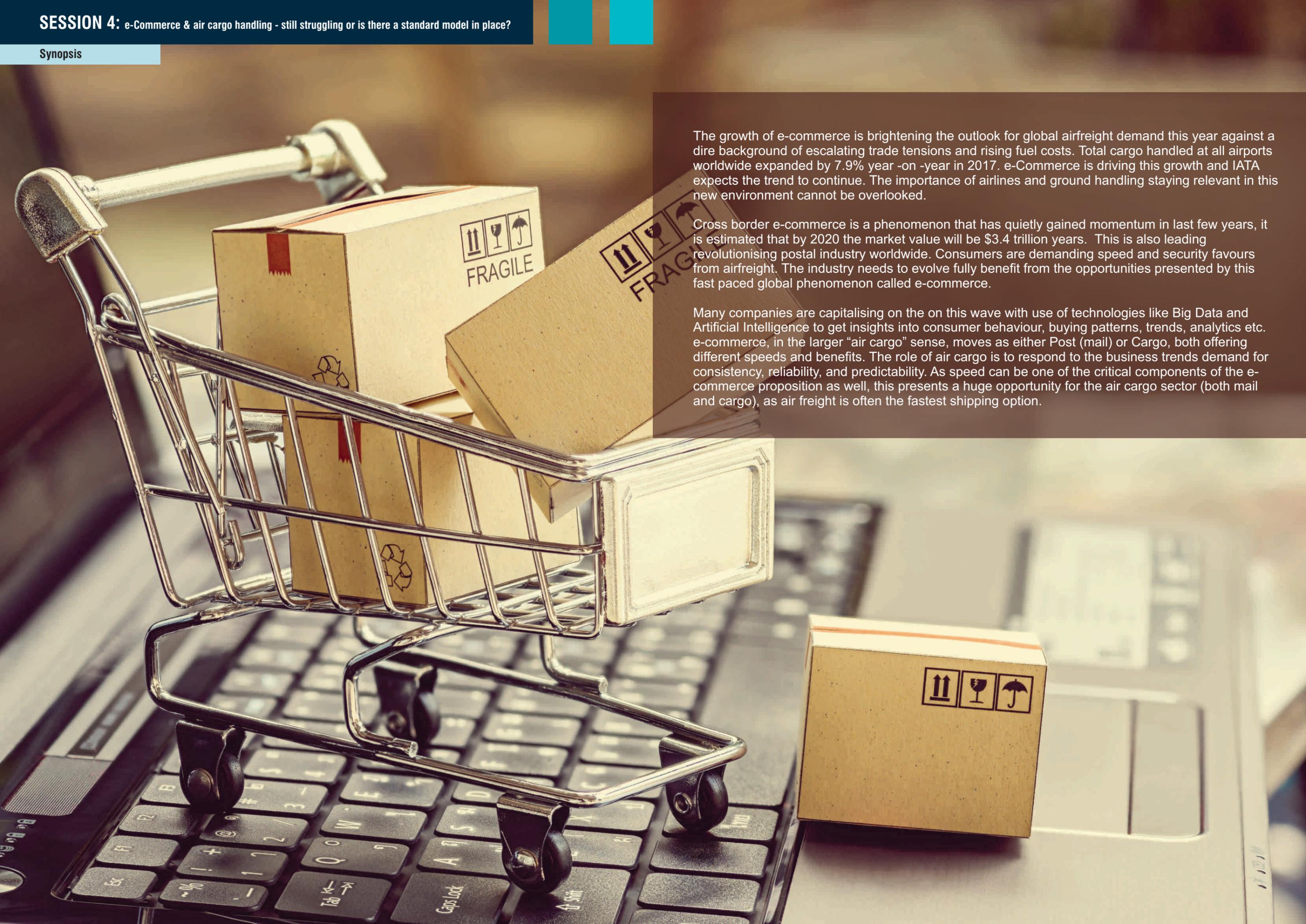
Q

How do we see Air Cargo Industry 10 years from now? What kind of technologies can impact and facilitate trade?

A

Tushar Jani: There will be e-marketplaces, like between exporter to importer, there will be e-Marketplaces (like Alibaba, Amazon). If such marketplaces come in place, then it will increase the industry size. The regional e-marketplaces e.g. Sri Lanka, Bangladesh, Bhutan don't have payment facility in Foreign currency to go out, if in SAARC, India can set up e-marketplace, the goods can go out of India to these countries with FTA would go on zero value. Following SAARC, ASEAN can follow the same. Monopolies will not survive if these regional e-marketplaces come into existence.





The growth of e-commerce is brightening the outlook for global airfreight demand this year against a dire background of escalating trade tensions and rising fuel costs. Total cargo handled at all airports worldwide expanded by 7.9% year-on-year in 2017. e-Commerce is driving this growth and IATA expects the trend to continue. The importance of airlines and ground handling staying relevant in this new environment cannot be overlooked.

Cross border e-commerce is a phenomenon that has quietly gained momentum in last few years, it is estimated that by 2020 the market value will be \$3.4 trillion years. This is also leading revolutionising postal industry worldwide. Consumers are demanding speed and security favours from airfreight. The industry needs to evolve fully benefit from the opportunities presented by this fast paced global phenomenon called e-commerce.

Many companies are capitalising on the on this wave with use of technologies like Big Data and Artificial Intelligence to get insights into consumer behaviour, buying patterns, trends, analytics etc. e-commerce, in the larger "air cargo" sense, moves as either Post (mail) or Cargo, both offering different speeds and benefits. The role of air cargo is to respond to the business trends demand for consistency, reliability, and predictability. As speed can be one of the critical components of the e-commerce proposition as well, this presents a huge opportunity for the air cargo sector (both mail and cargo), as air freight is often the fastest shipping option.

Steven Polmans

Head of Cargo & Logistics, Brussels Airport Company / TIACA

Moderated by



Q

Air Cargo & GHA – what is the potential, and can we transform fast enough?

A

Håkan Nilsson: Things are changing very fast, the user experience in e-commerce is now moving to Augmented Reality. The user experiences a very good buying experience on the virtual world which can be a threat to the brick and mortar stores.

Dr. Emre Serpen: Some of the numbers for e-commerce are \$3.4 trillion market size, 22% of all trade is cross-border. However, the upside potential is that 25% integrators business DHL, is e-commerce and 3% of all the cargo is via e-commerce, is getting charged at general cargo fares. The cross-border e-commerce growth is 20% YoY. The expectation from Amazon is max 8 hours and some 2 hours to clear the cargo on the airport. General GHA doing massive things in current environment.

Michael Mackey: In China the trend is that the huge shopping malls that they are now building have fewer and fewer retail shops and more entertainment and dining facilities. One of China's giant e-commerce company JD.com are developing a new model where they are setting up stores where one can go, try and order online from the store and the goods are delivered within 2-4 hrs. This will complicate the last mile delivery.

Q

Is it enough to just do a regular job of a GHA and customs clearing? Do you think growth will not be that strong in years to come?

A

Tushar Jani: Air cargo get in partnerships with other players and transform business and manage information like DHL and then rise up to Amazon's. Partnering and corporation deals with last mile partners. There is lack of collaboration in airlines and handlers. Last mile delivery is a huge challenge. There is going to be compartmentalized e-commerce – high value, low value. E-Commerce will get regionalized. Distribution has to be cost-effective. Time sensitivity – Time to clear the goods from customs and get it on the ground for delivery is essential. Thirty-two percent items come back to e-Commerce – big challenge and big cost. Cheaper and cheaper supply chain solutions with margins of 1 or 2 percent are available. Country to country, continent to continent there are different ways to handle.

Growth will be challenged by supply chain cost. They will also face supply chain problems which will eventually come down to having regional warehouses/ distribution centres from where the last mile delivery will happen. Average value of products shipped is lower. Last mile delivery – all postal office attacking this business. The big companies are opening distribution centres that covers one big nations.

Q

What is the work that Alibaba is doing on ocean cargo?

A

Linda Wang: Alibaba has e-commerce platform around the world and a logistics platform. This logistics platform supports the business across the globe on the fulfilment, delivery network and customs clearance which cover 224 countries and their regions. We have cross-border partners. We have the eWTP initiative, which is an electronic world trade platform, and we would like to have e-hubs. Our first e-hub is developed in Malaysia. We are also actively working on Ali-express and B2B Alibaba.com. We have challenges on visibility, data accuracy, data unavailability, no real-time data. We have initiated a task force in October 2018 along with IPCSA.

Q

What is the role of stakeholder in e-commerce?

A

Amar More: Technology needs to support the supply chain. Developing new digitization strategy is of utmost importance while the e-commerce business keeps growing. A 360-degree approach is required to leverage this growth of e-commerce for the Air cargo industry. To clear the goods from an airport for a GHA takes long hours versus a big integrator like FedEx or DHL, the customs clear the goods in 2 hours.



Air cargo represents more than 35% of global trade by value. Despite being a costlier mode of transportation, the growing demand for perishables, chemicals and valuables, and the rising demand for just-in-time production of goods has created a massive demand for airfreight services. Today, airfreight is being impacted by the rise of e-commerce from both B2B and B2C perspectives. The evolving e-commerce has put pressures on sales channels for faster delivery and optimum supply chain. This scenario brings opportunities for the third-party logistics and warehousing services to integrate with the air e-commerce channel. Furthermore, cargo airlines plan to tie up with logistics service providers to create an efficient supply chain regarding freight forwarding, storage capability, and customs clearances. Businesses, such as pharmaceuticals, perishables and high-value goods are also turning out to be new opportunities as they depend on air transport for its speed in delivering high-value, time-sensitive, and temperature-controlled products.

The future of air transport will be driven by a digital transformation it will increase the value proposition by bringing in innovation and new solutions. By embracing the Internet of Things and connecting everything across the industry the industry will produce more data which can be used with Artificial Intelligence to create valuable insights and expose new ways of working. Over the next 20 years, this use of digital technologies to improve service, operations and efficiency will have profound effects on the air transport industry.

Understanding the trends and opportunities of the air cargo industry will be the key to maintaining stability in the future.



Kai Domscheit

CEO, CHI Deutschland Cargo Handling GmbH

Moderated by

Q

We saw the case in India where the country improved its ease of doing business ranking from 170 to 77. In Africa one of the key priority is to improve ease of doing business. Will any of the African countries come to India to seek assistance to improve their ranks?

A

Maarten Klijnstra: According to me, this may not work, because a lot that goes into this is the inter-governmental cooperation. For example, in Kenya 66% of GDP is tied up in debt that goes to China for infrastructure, therefore Kenya is in a desperate need to export products to China.

Vineet Malhotra: The answer is both yes and no, in a continent of 54 countries some may want to do. A small country Lesotho wants to improve their rank. As part of the WTO trade negotiations, there needs to be a nodal officer who looks at all of this. South Africa ranks below than most of the countries and smaller ones like Mauritius is much higher in ranking and they work with Indians. This is due to geopolitical reasons like infrastructure help from China, soft infrastructure from India, donation from USA and Europe.

Q

Where do you see the next big evolving market for the industry from the airline perspective.

A

Murat Yalçın Kırca: We are improving our Africa network which is in our future growth scope. We are also buying new wide-bellied aircraft and would be tapping North and South American destinations along with South Asia. We want to target the niche markets.

Q

What are the innovative technologies you provide cost effectively for us and where do you see your customers/prospects render your services?

A

Amar More: We don't have any organized forum where we formally hear from our customer how they want to take things differently. We all have our own vision of our air cargo industry and we are moving our products towards it. It encompasses technologies like blockchain, IOT, AI. We would also like to prepare our customers on the regulatory changes that are coming, as some of them could have disruptive impact and also on the trade facilitation front. We would like to encourage data re-usability and eliminate paper-based transactions. We shall go to all our handling customers with community systems which would sit on their enterprise systems and operate more efficiently.

Vineet Malhotra: We all are the mirror image of ourselves there is no cross-pollination from the adjacent domains like Maritime and other sectors. There are other good things happening at that side too. Even outside the industry there are many good practices happening, if we can bring some of those elements in, this would benefit us to a great extent.

Q

How is Kale as a technology company overcoming challenges of dealing with decision makers who are 45-50+ who do not understand the underlining technology?

A

Vipul Jain: If we can collectively think beyond eAWB, and think about Trade Facilitation to make trade simpler, how do we channelize information and movement of cargo simpler, how all the players are able to access and send the information needed in a simpler way. We want to do that and for that, we have to spread out to the large players. We are going in that direction by regulating it because the customer today is pushing us. There are many service providers and the customers will choose their own way. Which system which are not on the top will not only facilitate but are pretty disruptive too unless we start competing with the players in the ocean trade. We are working towards and how you can help is to look and embrace digitization of data, enterprise automation, differentiate the service. Beyond that we all have to move for, not one person can mandate it except for Government. Nine percent to Ten percent growth is complete with land and ocean freight cut across the value chain, so collective effort is needed to introspect how we can work for our value chain and look for solutions.

Key takeaways:

- Africa is an emerging market for the air cargo industry with demand being boosted by strong growth in Africa-Asia trade.
- Customs and government department needs to automate their processes to be efficient and swift.
- African countries are very keen to improve their ease of doing business ranks with World Bank. They should seek assistance and help from other countries who have improved their ranks in a short span of time.
- New technologies need to be taught to the industry.
- The air cargo industry needs to do good PR to attract new talent.



Tushar Jani
Chairman
CSC



Dr. Emre Serpen
Executive Director
Saudi Arabian Airlines



Denny Fikri
President Director
Angkasa Pura Kargo



Massimo Roccasecca
Cargo Director
Aeroporti del Garda



Henry Christopher
Chief Operating Officer
Oman Air Sats



P Balasubramanian
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Air Cargo Week



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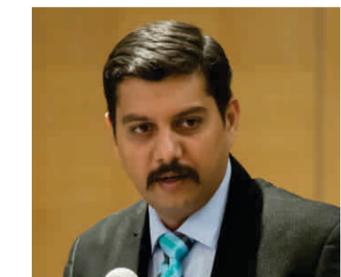
Vineet Malhotra
Director
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Session 1 - Air Cargo Handling Infrastructure: looking back & ahead

- To set-up KPI's and communicate best practices across the Air Cargo industry
- Assess quality with some matrix to ease movement of cargo
- To look at the CSQ by TIACA and circulate the same to the group
- Reference to IATA's Smart Facility – Take few points from it and map it with Air Cargo Handling Infrastructure session

Session 2 - Regulatory and industry initiatives: taking stock

- What are the differences and timelines for ACI initiatives (harmonization of ACI data in different countries)
- How do regulators plan to handle the 'Not Ok to Board' shipments

Session 3 - Trade Facilitation – unlocking value from the air cargo supply chain

- Find out best practices on Trade Facilitation carried out in other countries
- Mapping CSQ with trading across borders, Logistics Performance Index (LPI) by world bank

Session 4 - e-Commerce and air cargo handling - still struggling or is there a standard model in place

- To gather information on exact need from e-commerce companies in terms of air logistics
- To check and define expectations from the GHA's to better facilitate the e-commerce business
- Opportunities – What's in it for the GHA's and airports: How the need and expectations can be leveraged and turned into opportunities

Session 5 – New Markets and new horizons for Air Cargo

- Research and action around attracting young talent in the industry

“ CLEAR VIEW brings together industry leaders, sharing their views and vision on industry relevant trends and challenges. The setup allows for in-depth discussions and are concluded by defining action points.

– Steven Polmans, Head Of Cargo and Logistics at Brussels Airport Company and Member of the Board at TIACA **”**

“ This event exceeded my expectations. The value brought by the discussions was immense. The call for action can become a force to reckon with. All of us have an opportunity and bounden duty to bring the industry to that level so that the baton is passed on in the right manner. Then, of course, it is for the next generation to run with it and make it even better. That's the way I see it. So a very big thank you and congratulations to Kale Logistics Solutions for bringing in such a focussed place where experts can really exchange ideas and that seed can be germinated and that can turn into a specific idea, a workable idea. I am very happy about that. Thank you.

– P. Balasubramanian, Founder & CEO, ACCIS (Air Cargo Consultancy International Services) **”**

“ First of all I would like to thank Kale Logistics Solutions for inviting us here. What is most important is change of mindsets. Before investing you have to change the mindset of the people involved and then it is meaningful to make the investment. This was my first time at CLEAR VIEW. Most of the attendees here are leaders in the industry, so I think forums like this one have the potential to increase the potential of the entire industry. CLEAR VIEW is a great asset for everybody.

– Murat Yalçın Kırca, Turkish Airlines/Turkish Cargo, Vice President of Cargo (Operations) **”**

“ It's been great sessions attended by industry professionals. Thank you.

– Dr. Emre Serpen, Executive Director, Strategy and Business Transformation, Saudia Cargo **”**

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'Jack the Pirate' theme

This year the theme for Clear View 3.0 was 'Jack the Pirate.' Jack added an interesting dimension and a dash of much-needed humour to the intensive presentations and discussions at the summit. The theme continued well into the dinner cruise and the delegates sportingly donned pirate caps and eye-patches and got in the spirit of the theme.