

Bringing CLUSTERS 2.0 innovations on the market: approach and business models

Logistics Clusters - Key drivers for the European Green Deal Confirmation

14 July 2020
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Agenda

- › CLUSTERS 2.0 Business Models - Approach
- › Business Models highlights
- › Exploitation plans

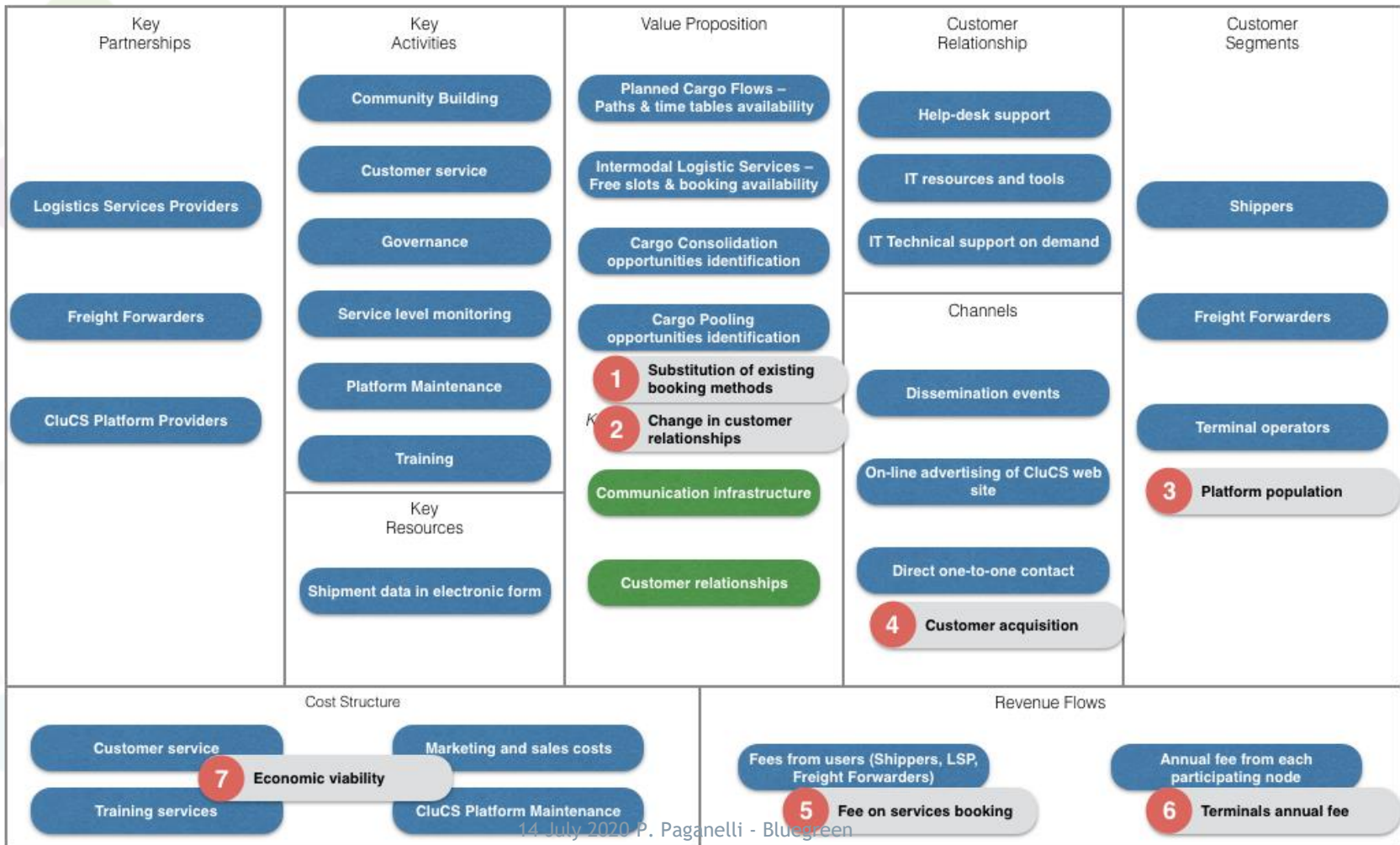
Clusters 2.0 Business Models - Approach

- › Definition of new business models based on Clusters 2.0 innovations,
 - Stakeholders' roles, gains and mutual contributions to value creation.
 - Must be beneficial and economically viable for the different kinds of involved stakeholders, while they pursue their individual objectives.
 - Highlight key assumptions that will drive the exploitation activities.
- › Validation of the new business models in the living labs
 - how resources are shared, value is generated and exchanged, up to the final customer
 - how gains, costs risks and responsibilities are handled in a real implementation.

CluCS Business Model

The Cluster Community System (CLUCS) is a web platform aimed at improving co-ordination and optimisation of logistic resources and infrastructures in the Cluster.

CluCS Business Model - Key Assumptions



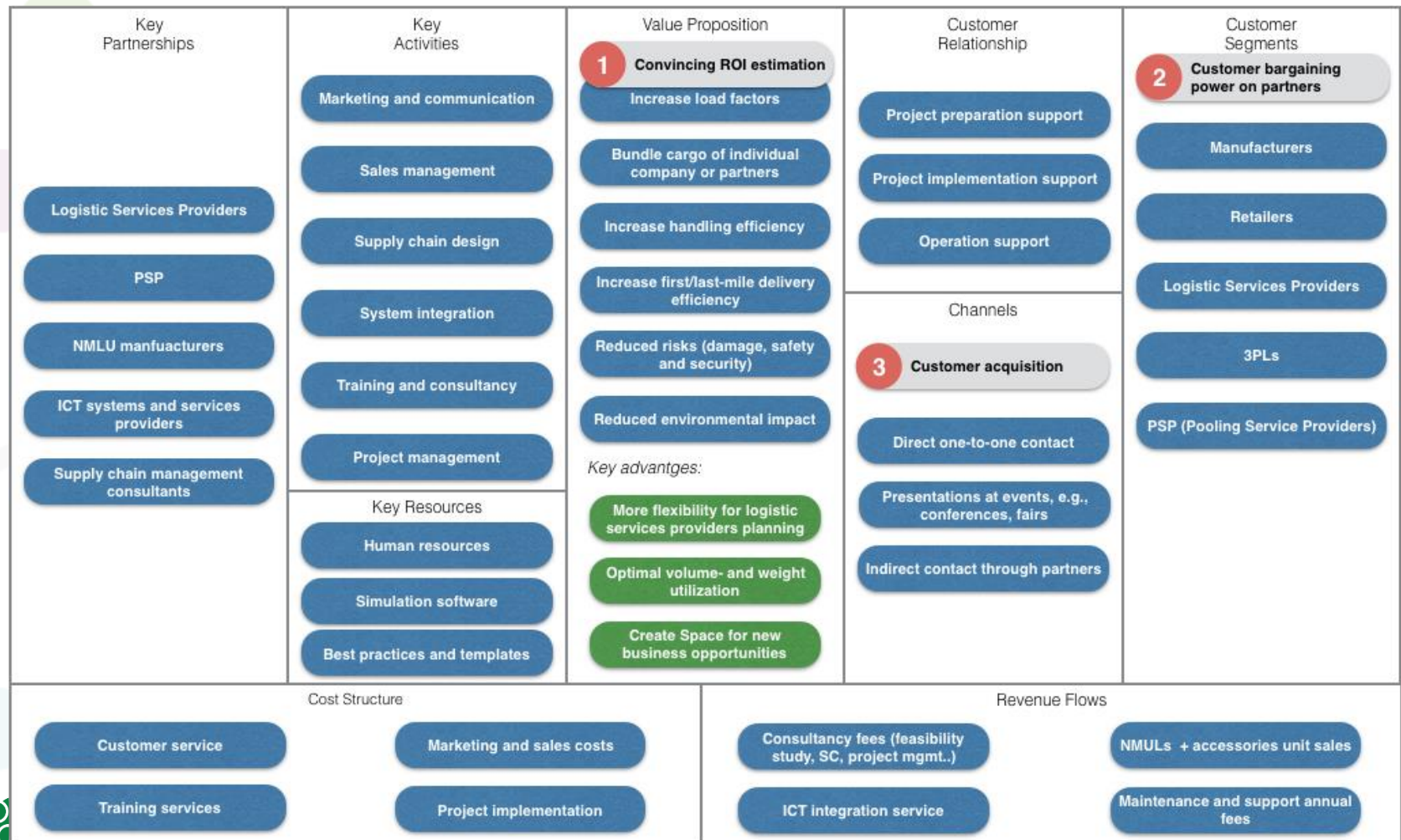
CluCS Business Models - Highlights

- › CluCS will be delivered through a “platform” business model that relies on all key players to be active on the platform (shippers, logistic services providers, terminal managers and operators).
- › Platform’s population is the key assumption, since the value of the platform itself depends on the number of active operators to enable cargo bundling opportunities.
- › The survey carried out on potential target customers has positively confirmed that substitution of existing booking methods is accepted by the largest share of potential users, even those already using IT tools.
- › Change in customer relationships, switching to more short-term relations, seems also not to be a problem for users willing to adopt more agile booking methods.
- › It is recommended that a MVP version of the platform is tested as soon as possible on the open market, to verify the hypotheses on economic viability (now validated on paper) and platform population.

NMLU Business Model

New Modular Load Units increase load factors of boxes, containers and vehicles, allow better fill rate and can be easily combined, loaded and unloaded.

NMLUs Business Model - Key Assumptions



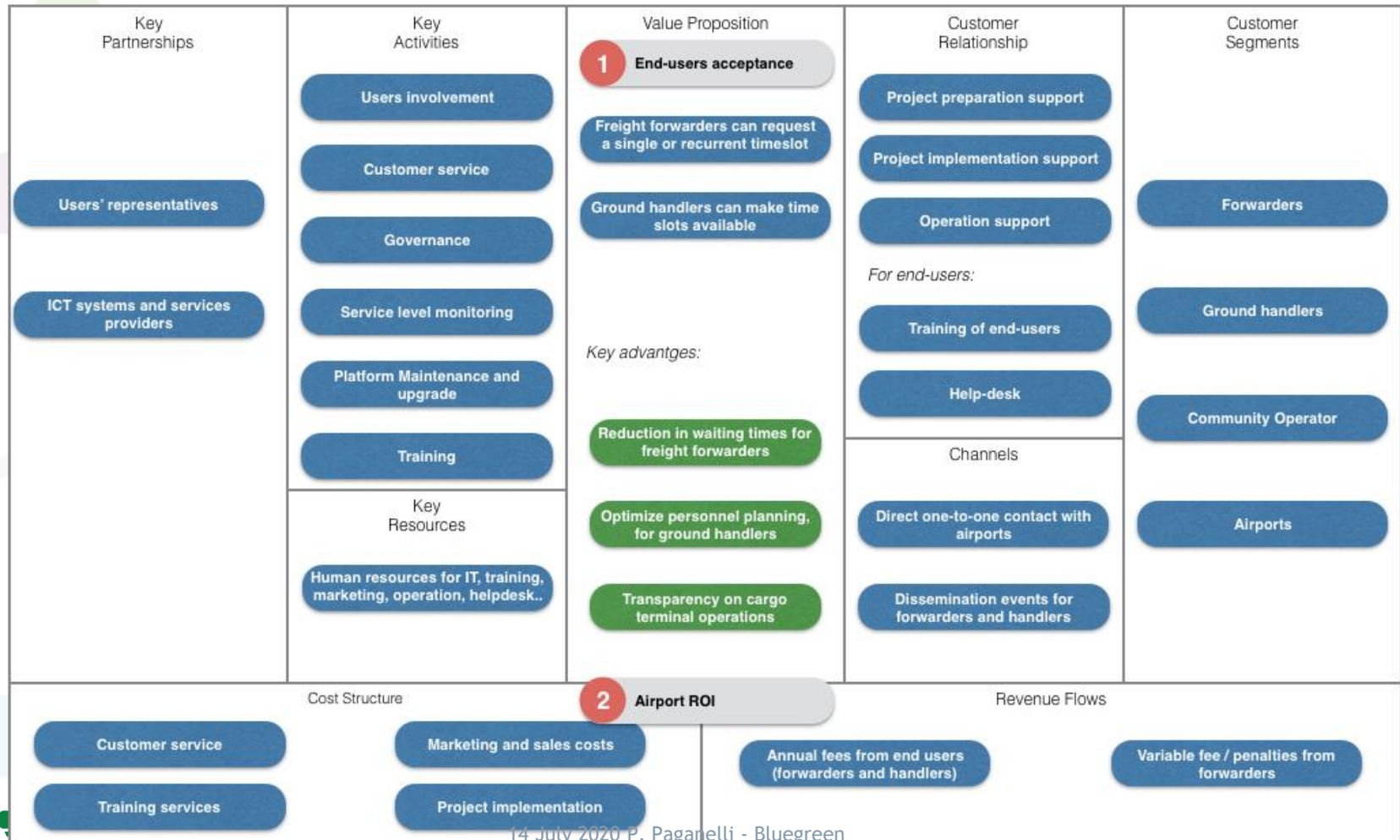
NMLU Business Models - Highlights

- › NMLUs will be offered through a “project” business model. A suitable customer, i.e., a retailer or manufacturer controlling a significant part of the supply chain, will launch a supply-chain redesign project based on NMLUs with a convincing ROI (now validated on paper).
- › ROI has been convincingly validated on data acquired during the test.
- › It is a “shared” ROI, implying shared investments, e.g., on warehouse equipment and trailers.
- › To reach these large and complex target customers, customer acquisition is going to be a quite expensive and long process, and it involves a complex value-chain with a strong leading vendor to “sell” the project to its partners.
- › It is recommended that the interested Clusters 2.0 partners search for suitable industrial partners to set-up such a value-chain.

Slot Booking Business Model

The solution is a web platform working as a central window to book a time slot for freight delivery or pick up at airport.

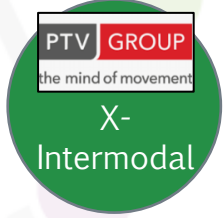
Slot Booking Business Model - Key assumptions



Slot Booking Business Models - Highlights

- › Slot Booking solution is offered through a project business model, for the airport implementing it, and a platform model for the end-users (forwarders and handlers).
- › Validation on the living lab confirms the main assumptions in the business model in terms of end-users acceptance and economic viability (airport ROI).
- › It is recommended to implement strategies to facilitate adoption in the initial stages, when the platform can be offered at no cost for end users without significantly compromising the economic returns of the project

Commercial exploitation - overview



Business Model

Platform (all Cluster stakeholders)

- Adoption critical for success (all or nothing)

Online service

- Needs data providers
- Needs service operator

Consultancy

- Profitable since start
- Difficult to scale

Supply chain redesign project

- Needs strong leading customer
- Hard to sell

Platform (airport)

- Verified airport ROI
- Users willingness to join

Market/Financials

Market = Cluster

Financially viable with users + nodes fee

Large and growing market of intermodal planning

Good EBITDA for technology provided

Large shippers and LSPs

Revenues and margins in line with consultancy businesses

Leading retailers and manufacturers

Positive ROI simulation on test results, but needs sharing among partners

Airports

ROI for airport confirmed

Users adoption confirmed

Developm. stage

TRL 5

TRL 7

TRL 8

TRL 4/5

TRL 9

Next steps

Minimum Viable Product required asap to test adoption.

Further investments needed.

Industrialisation.

Need service provider partners.

Trials with early adopter customers.

Deployment on cloud.

Find industrial partners to complete value chain and to access the market.

Extend to other airports.

New features incremental development.



Clusters 2.0



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