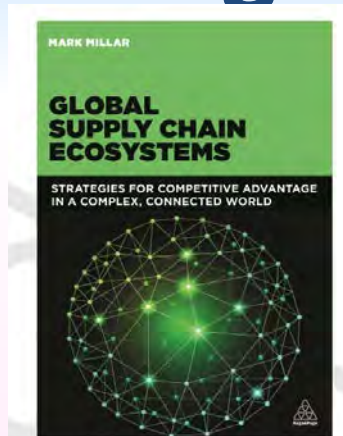




8th Philippine Ports and Shipping 2015

# “Developing Efficient & Effective Logistics Networks in ASEAN”



Manila, February 2015

**Mark Millar**, MBA, FCILT  
[mark@markmillar.com](mailto:mark@markmillar.com)



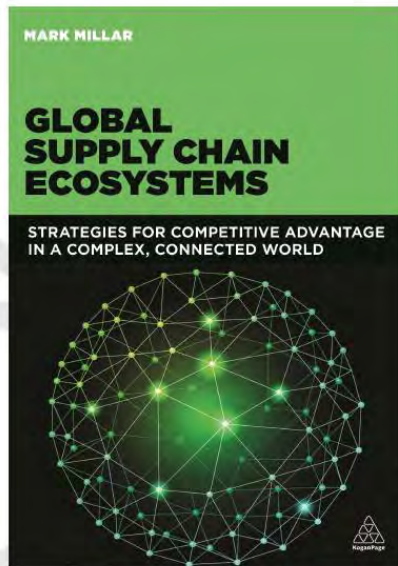
# Global Supply Chain Ecosystems

Strategies for competitive advantage in a complex, connected world



**A ground-breaking new book by Mark Millar**

Published 3rd June 2015



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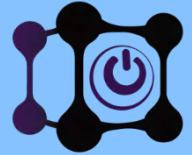
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# Mark Millar

MBA, FCILT, FCIM, FHKLA, GAICD, SCOR-P  
Managing Partner, M Power Associates



**Mark Millar** provides value for clients with independent, external and informed perspectives on their supply chain strategies in Asia.

Acknowledged as an engaging and energetic presenter that consistently delivers a knowledgeable, professional and memorable impact, Mark has completed over 350 speaking engagements at corporate events, client functions and industry conferences across 23 countries.

Recognised as a leading industry expert, Mark leverages over 30 years of global business experience to deliver practical knowledge and educated insights that help companies navigate the complex landscapes in Asia, develop new business opportunities, improve the efficiency of their supply chain ecosystems and make better informed business decisions.

Author of “**Global Supply Chain Ecosystems**” from Kogan Page, Mark is a Visiting Lecturer at Hong Kong Polytechnic University.

He is recognised as one of the “China Supply Chain Top 20” and listed in the USA 2014 “Top Pros-to-Know in Supply Chain”.



[Mark@MarkMillar.com](mailto:Mark@MarkMillar.com)

# Developing Efficient & Effective Logistics Networks in ASEAN



1

Why?

2

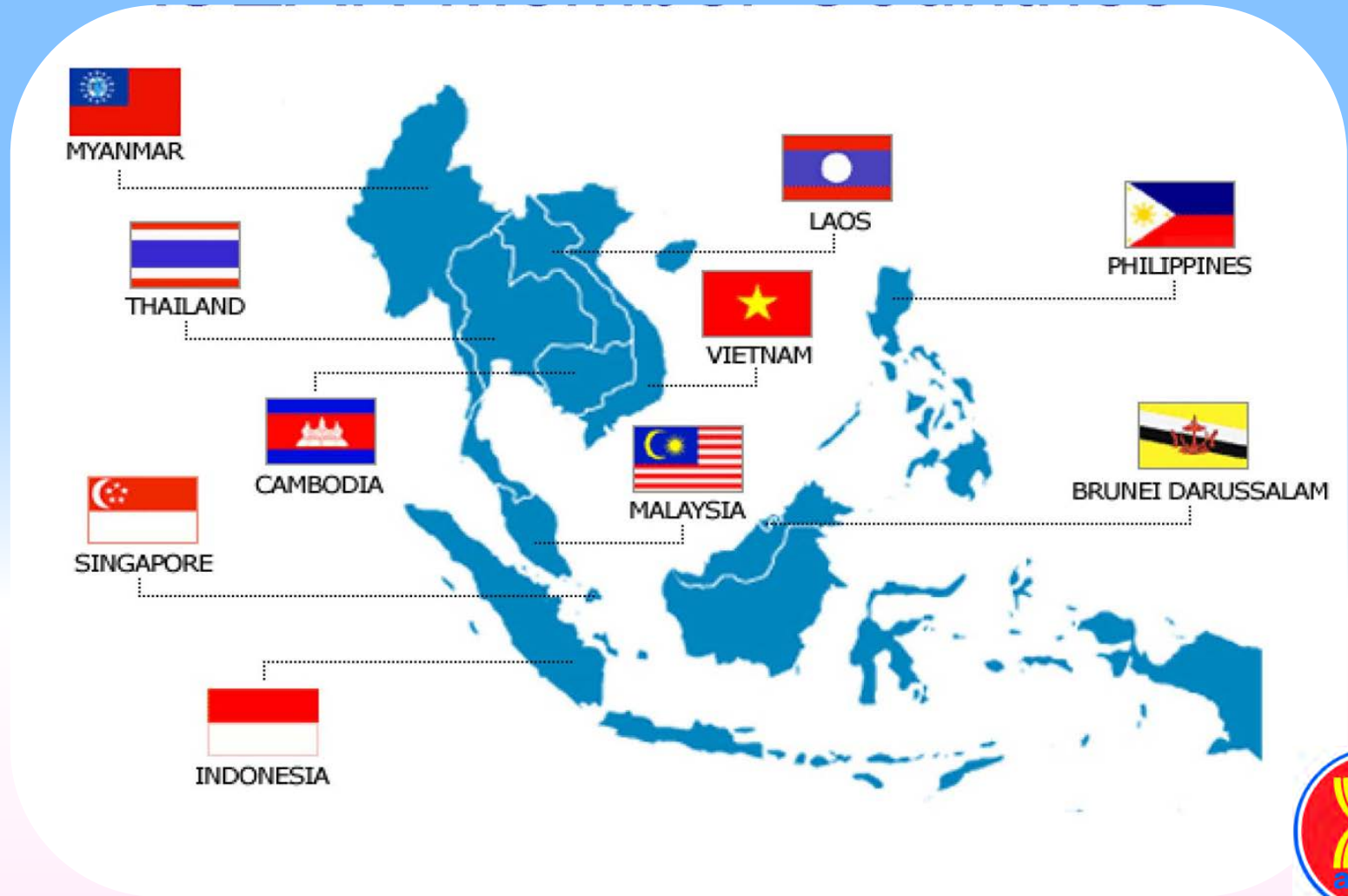
What?

3

How?



# WHY? Develop Efficient & Effective Logistics Networks in ASEAN

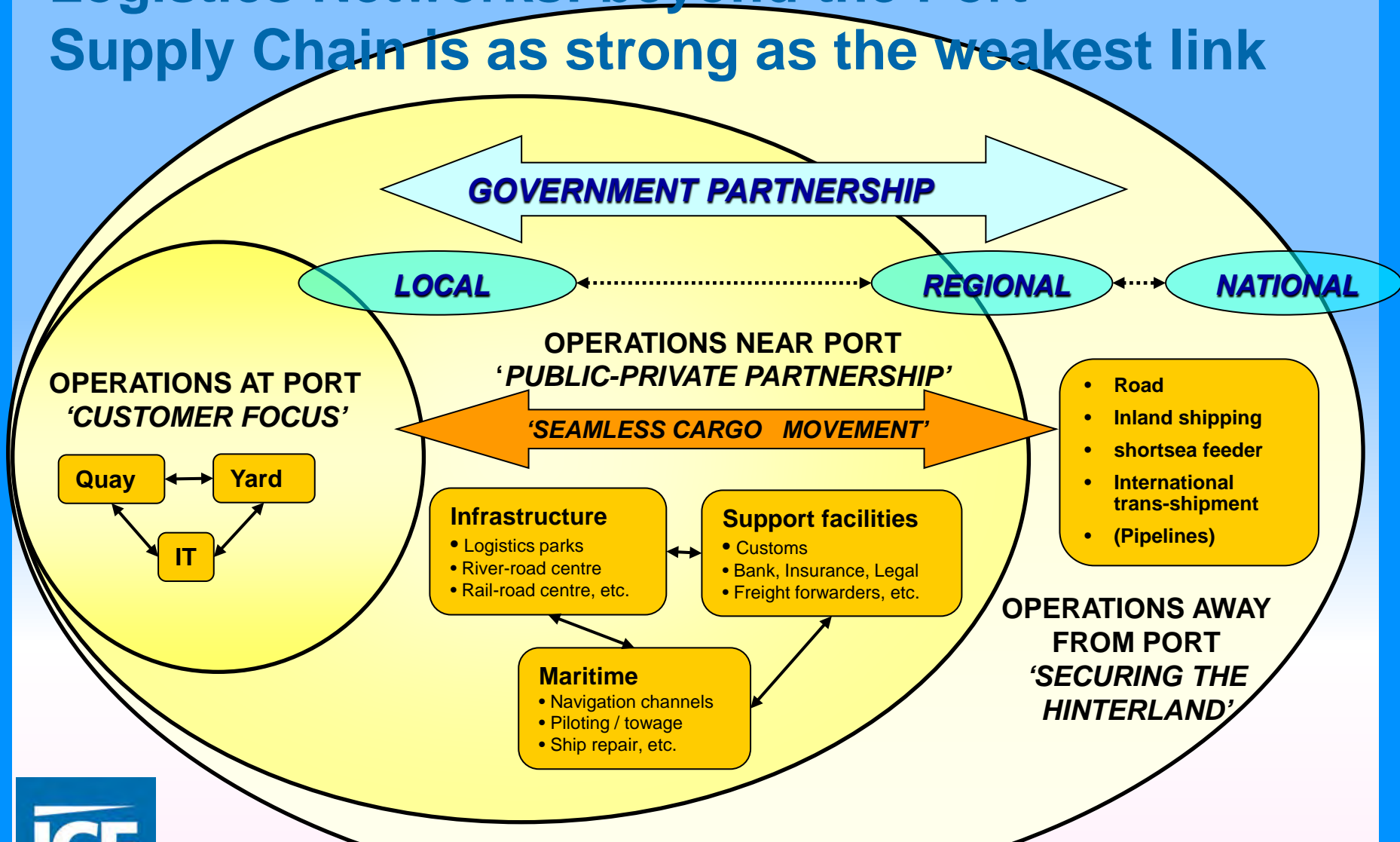


# Logistics Networks: empower and enable Supply Chain Ecosystems Every Business, everywhere, uses Logistics . . .



## The Business of Logistics . . . .

# Logistics Networks: beyond the Port Supply Chain is as strong as the weakest link



# Logistics Networks:

- Create Jobs across the Spectrum



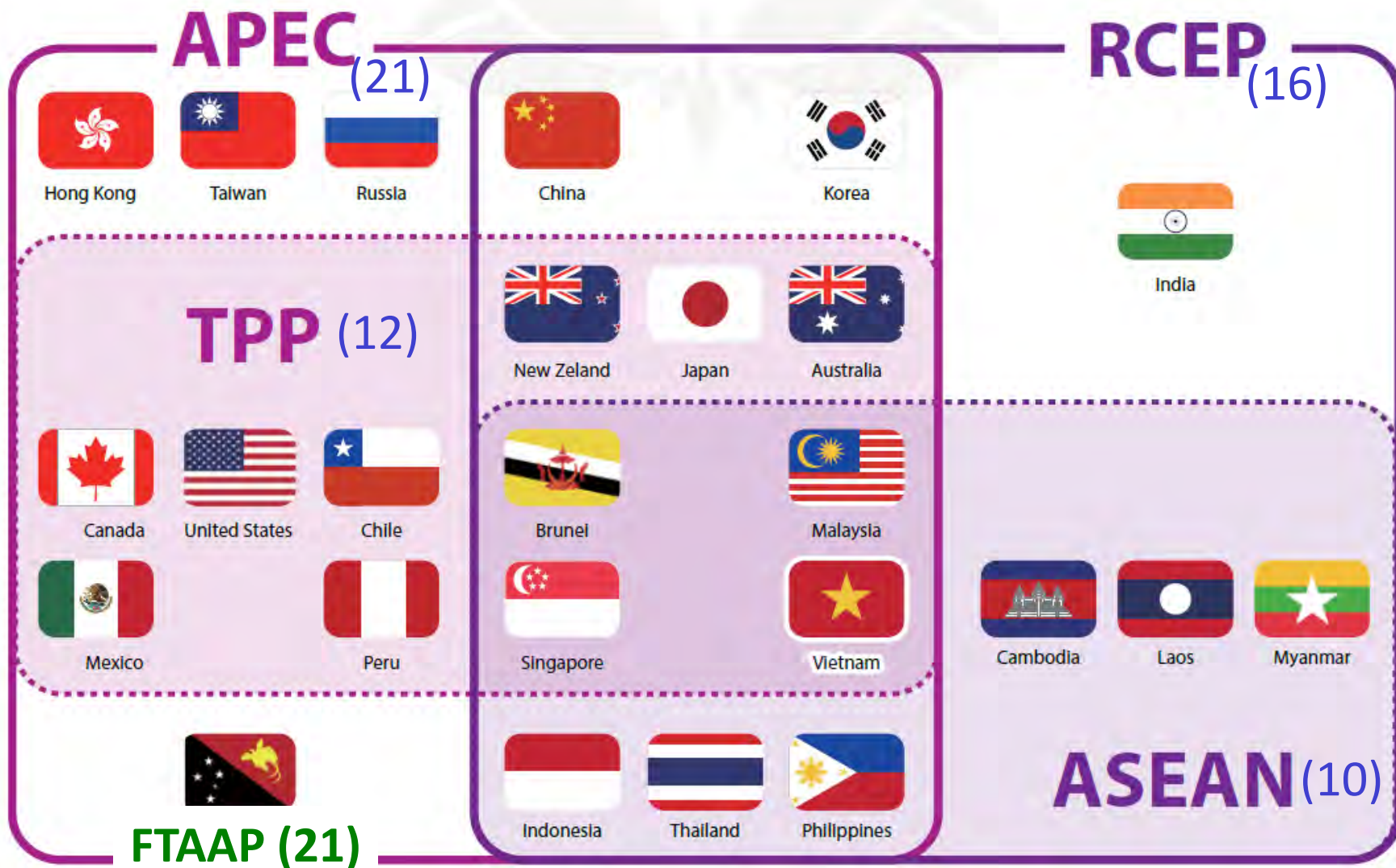


# Logistics Networks:

## - Attract Extended Economic Activities



# Logistics Networks: Serve increasing cross border trade flows



# WHAT? Develop Efficient & Effective Logistics Networks in ASEAN





COMMITTED TO  
IMPROVING THE STATE  
OF THE WORLD

Insight Report

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# The Global Enabling Trade Report 2014

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# Overcoming Supply Chain Barriers to Trade

Definition: Lack of Infrastructure, institutions, policies and services facilitating the free flow of goods over borders

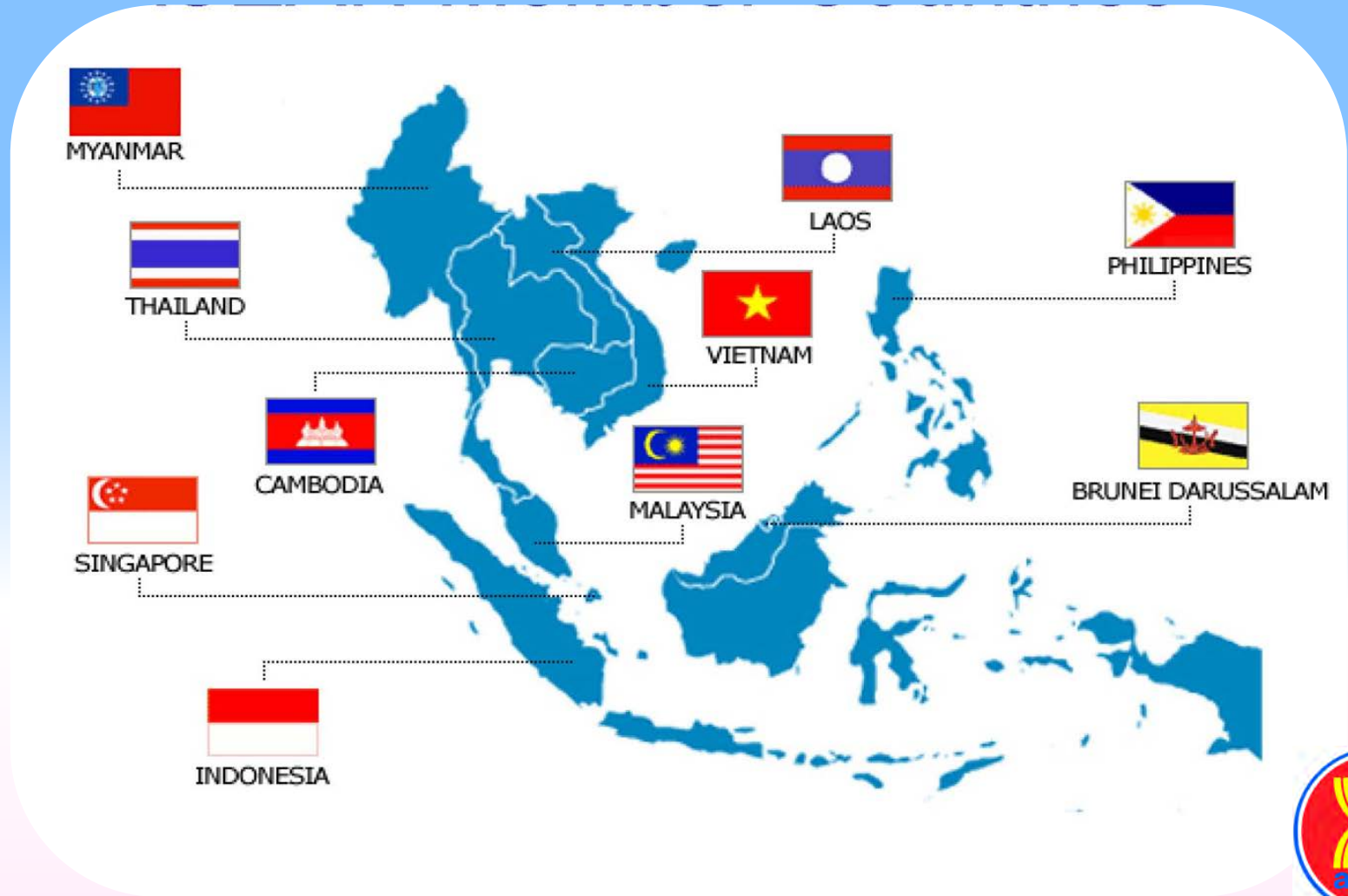
Market access	Border administration	Telecom and transport infrastructure	Business environment
<p><b>1. Domestic and foreign market access</b></p> <ul style="list-style-type: none"><li>- Quotas</li><li>- Import fees – not tariffs (e.g. tax schemes)</li><li>- Local content requirements</li><li>- Rules of origin</li><li>- Technical, sanitary and phytosanitary measures or other requirements</li><li>- Import/export licenses</li></ul>	<p><b>2. Efficiency of customs administration</b></p> <p><b>3. Efficiency of import-export procedures</b></p> <p>(e.g. coordination between border agencies; administration burden of complying with standards)</p> <p><b>4. Transparency of border administration</b></p> <p>(e.g. facilitation payments)</p>	<p><b>5. Availability and quality of transport infrastructure</b></p> <p><b>6. Availability and quality of transport services</b></p> <p><b>7. Availability and use of information and communication technologies</b></p> <p>(e.g. tracking, electronic-tolls, communication)</p>	<p><b>8. Regulatory environment</b></p> <ul style="list-style-type: none"><li>- Investment policy</li><li>- Hiring foreign workers</li><li>- Other regulatory environment issues (including trade finance)</li></ul> <p><b>9. Physical security</b></p>

# Enabling Trade Index: ASEAN

ASEAN Rank	Economy (total 138)	Global Rank	Score 1-7	Market Access	Border Admin	Infra-structure	Operating Environment
1	Singapore	<b>1</b>	5.9	2	1	1	2
2	Malaysia	<b>25</b>	4.8	40	33	23	27
3	Thailand	<b>57</b>	4.2	51	56	46	75
4	Indonesia	<b>58</b>	4.2	20	69	64	61
5	Philippines	<b>64</b>	4.1	11	71	89	82
6	Vietnam	<b>72</b>	4.0	34	86	60	81
7	Cambodia	<b>93</b>	3.7	36	108	101	74
8	Laos	<b>98</b>	3.6	39	114	115	68
9	Myanmar	<b>121</b>	3.2	25	117	136	134

Philippines ETI Progress: 2010 92, 2012 72, **2014 64**

# HOW? Develop Efficient & Effective Logistics Networks in ASEAN



# Logistics Networks: critical enablers that empower supply chain ecosystems

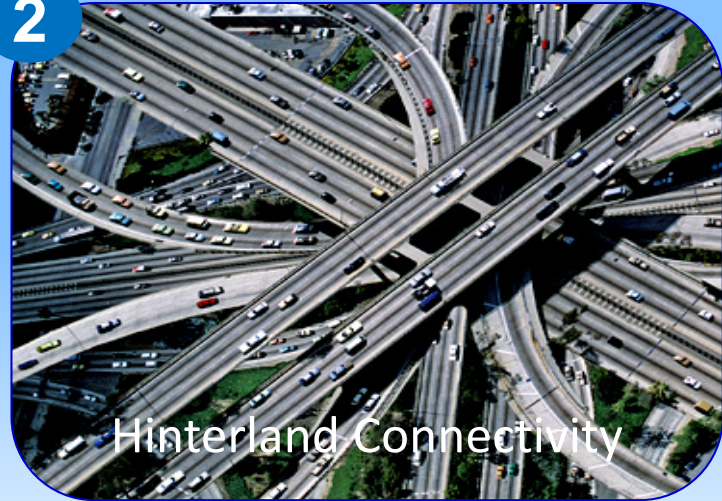
1

Infrastructure



2

Hinterland Connectivity



3

Regulatory



4

Talent





# Logistics Networks: Infrastructure & Connectivity

## - Asia Road Networks



# AEC 2015

## Maritime ASEAN RO-RO Network



# Integrated Logistics Hubs

eg HKIA unique, on-airport Logistics Hub



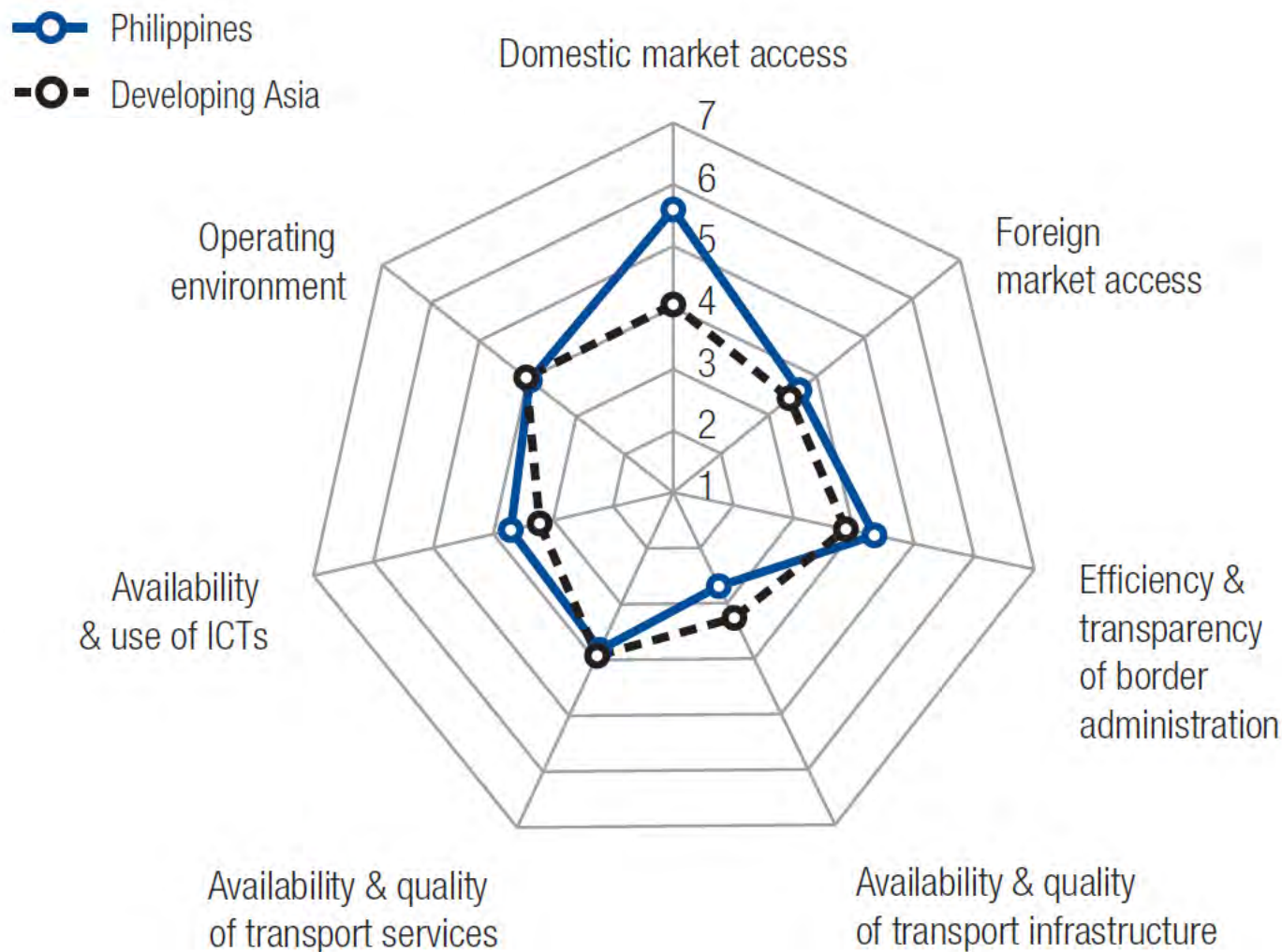
Regional Distribution  
Centre (RDC) and  
Logistics Hub  
30,000 sq m

HK Airport – 2 mins  
HK Port – 20 mins  
China SZ – 40 mins



# Enabling Trade Index 2014

PH improved to 64 in 2014 (92 in 2010)



# Efficient Logistics Practices can drive 20-40% more trade – three approaches

**Reduce**

**1**



**Admin Burdens**

**Reform**

**2**



**Customs, Security**

**Focus**

**3**

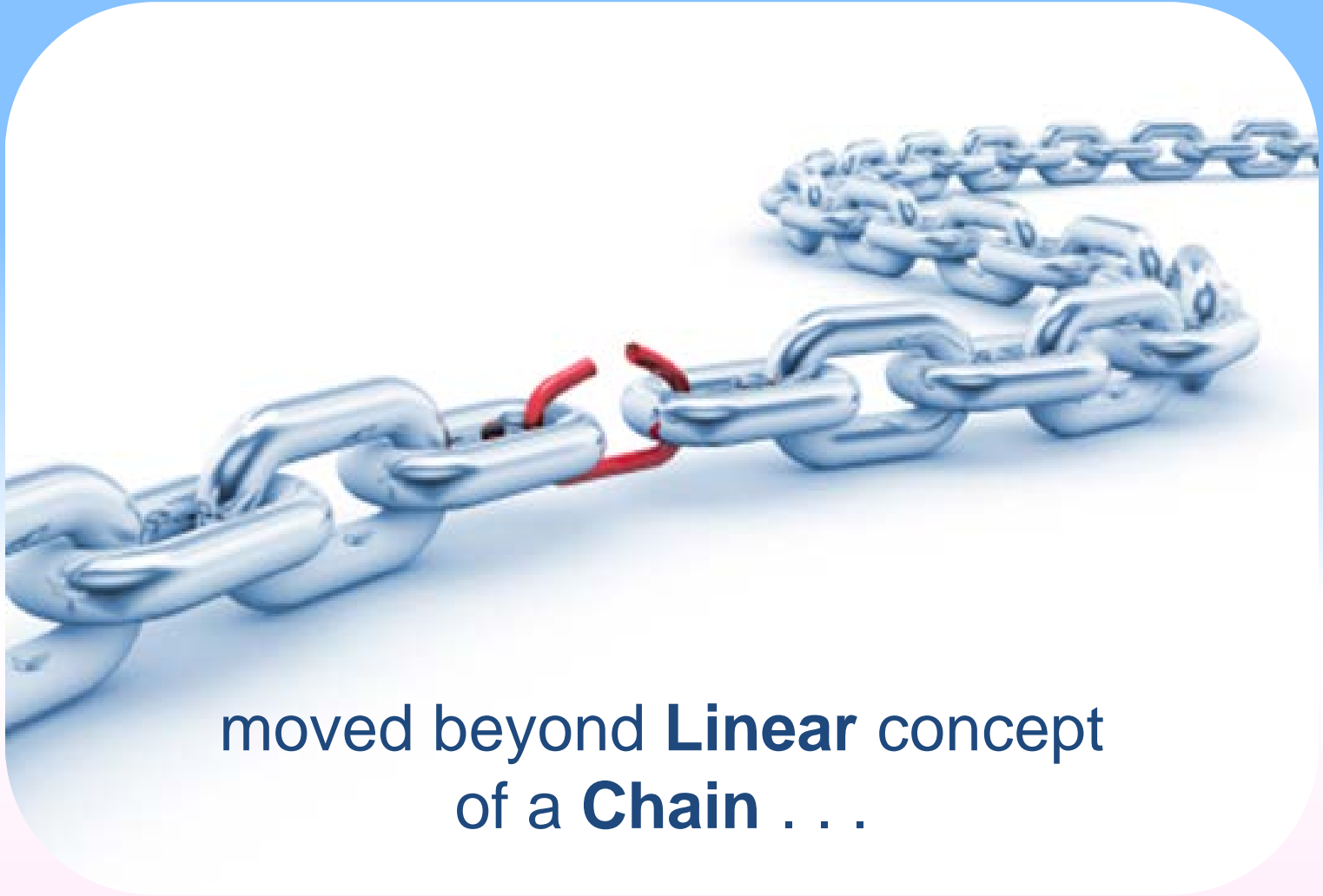


**Infrastructure**

“High paperwork requirements post challenges that push complexity in logistics procedures; Administration can often be the most time consuming element in the life of a shipment” CEO of DHL Global Forwarding

# Supply Chain

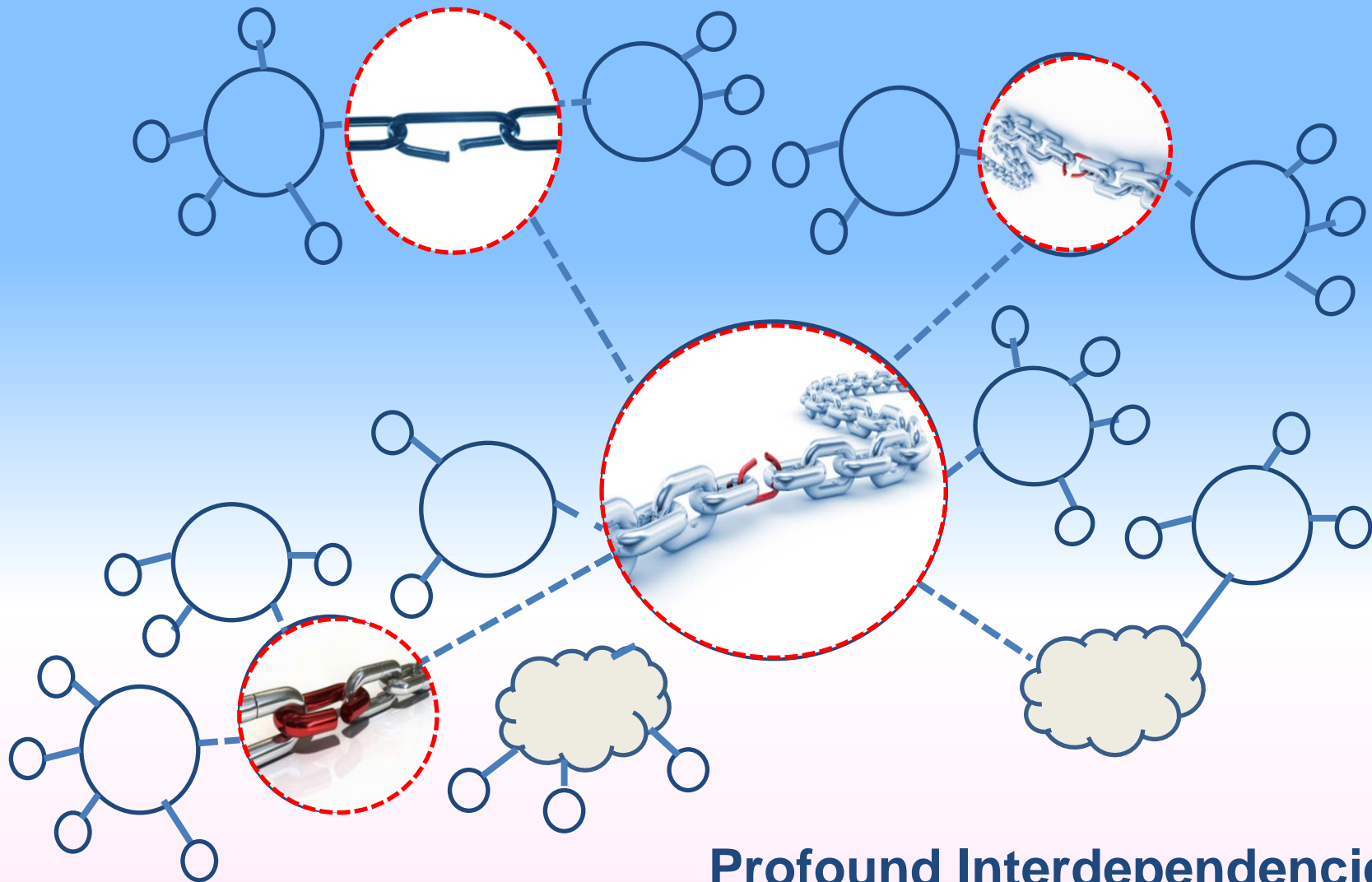
- is as strong as it's Weakest Link



moved beyond **Linear** concept  
of a **Chain** . . .

# Supply Chain Ecosystems:

- **Complex, Interconnected, Vulnerable**



**Profound Interdependencies**

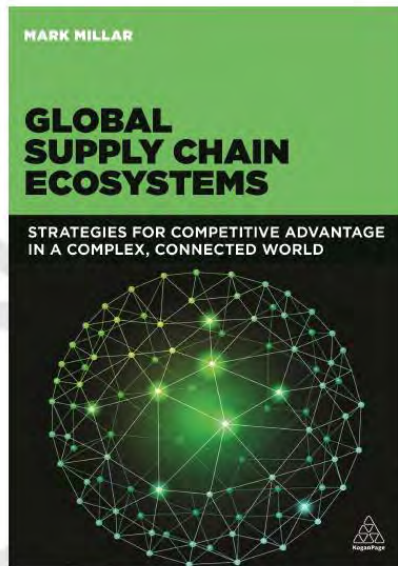
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*"a truly inspiring Speaker" "his engagement with the audience is second to none"*

Mark Millar is Managing Partner of M Power Associates Limited in Hong Kong



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Gain access to a network of experts with  
over 100 years' experience in Asia



Mark Millar

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### **Infrastructure Master Planning**

Strategic planning & economic analysis for ports, airports and logistics parks

### **Sustainable Supply Chains**

Environmental programs that reduce costs & enhance carbon footprint

### **Market Research and Intelligence**

Expert research and analysis on all aspects of the global logistics industry

### **Logistics Outsourcing**

International best practices in benchmarking, evaluation and selection of your 3PL

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M Power Associates is your gateway to empowering superior performance in supply chain and logistics, through an exclusive network of best-in-class business partners  
**Contact Managing Partner, Mark Millar on [enquiries@mpowerassociates.com](mailto:enquiries@mpowerassociates.com)**

