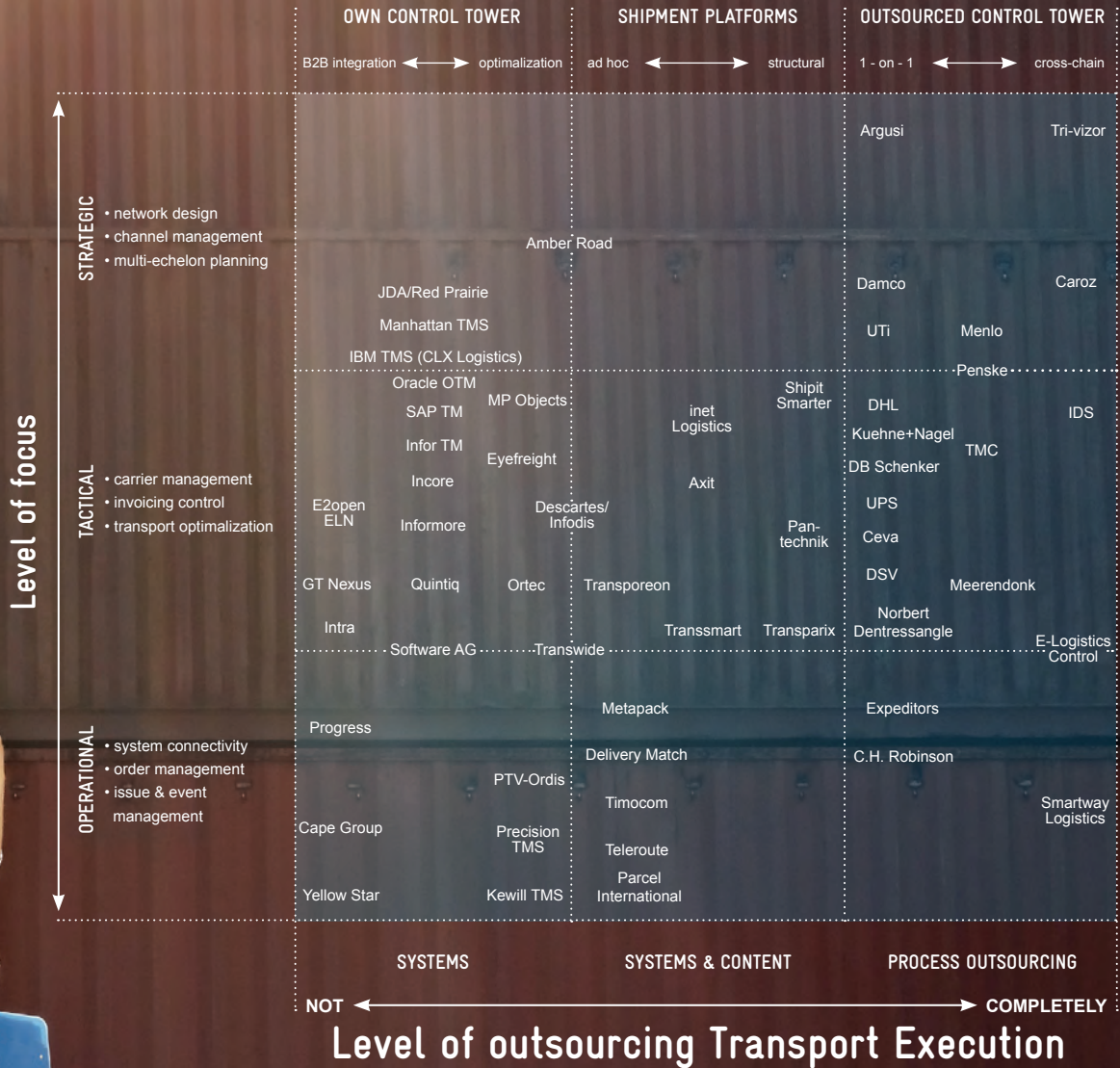


Transport Control Tower Solutions 1.1



Source: Supply Chain Movement (2013)

Many shippers are in the process of centralising their international transport due to increasing globalisation and the associated complexity of their supply chains. The question is, whether these companies intend to set up their own control tower for transport management or whether they are planning to outsource the activity. This matrix features a wide range of companies operating in The Netherlands in the field of transport execution & visibility.

The horizontal axis shows the extent to which transport management is outsourced. Companies can opt to implement systems themselves (left-hand side of the horizontal axis) or to outsource the activity to logistics service providers. In the middle are the platforms that enable shippers to arrange their own transport, aided by IT systems containing details of potential carriers and their rates. When outsourcing, companies can choose between logistics service providers who manage transport for each customer individually, and cross-chain orchestrators who do not have their own trucks and warehouses but instead bundle various shippers' freight flows.

The vertical axis of the matrix represents the company focus. The top-left corner shows major software suppliers such as SAP, Oracle and Manhattan who, in addition to having transport solutions which cover the lower levels, also have other strategic products in their portfolios.