MARITIME AND PORT AUTHORITY OF SINGAPORE (MPA)

TERM PROJECT

Team E
Deepakrishna
Ilansurya
Krishna Kumar
Tanishq

01

PROBLEM OVERVIEW

How might we leverage digitalization to future-ready and maintain the competitiveness of Maritime Singapore?

AS-IS

Digitalization adoptions by **20 SMEs** facilitated by MPA

Which equates to roughly 0.4% of the total number of SMES

TO-BE

At least **100 SMEs** undertake digitalization adoptions
Cultivate a culture of innovation and future-readiness
(Approx 2% of the total number of SMES by 2025)

- Maritime Singapore contributes to about 7% of our GDP and employs about 170,000 people

- MPA has invested heavily into technology to improve operational efficiency – digitalPORT@SG, digitalOCEANS, digitalSHIP, digital bunkering, electronic navigation charts, JIT arrival & departure, OCEANS-X

- Raised >$68 million investment for R&D through PIER71 startups.

- **MPA aims to incentivize SMEs to adopt technologies to increase productivity by 20% in 5 years.**

SME — Spoke to multiple SMEs that represented the different personas & level of IT/digital maturity

SSA — Spoke with Digitalization Committee Chairperson about his perspective of the current ecosystem and digital transformation efforts

MPA — Consultations with project sponsor and queries regarding industry perspective & resources such as MDP, IDP

02

ANALYSIS

KEY FINDINGS – SHIP AGENTS & SUPPLIERS

RESOURCES

- Lack of a quality technical team with digital transformation capability (Manpower)
- Lack of upskilling opportunities due to time constraints & multitasking (Information/Education)
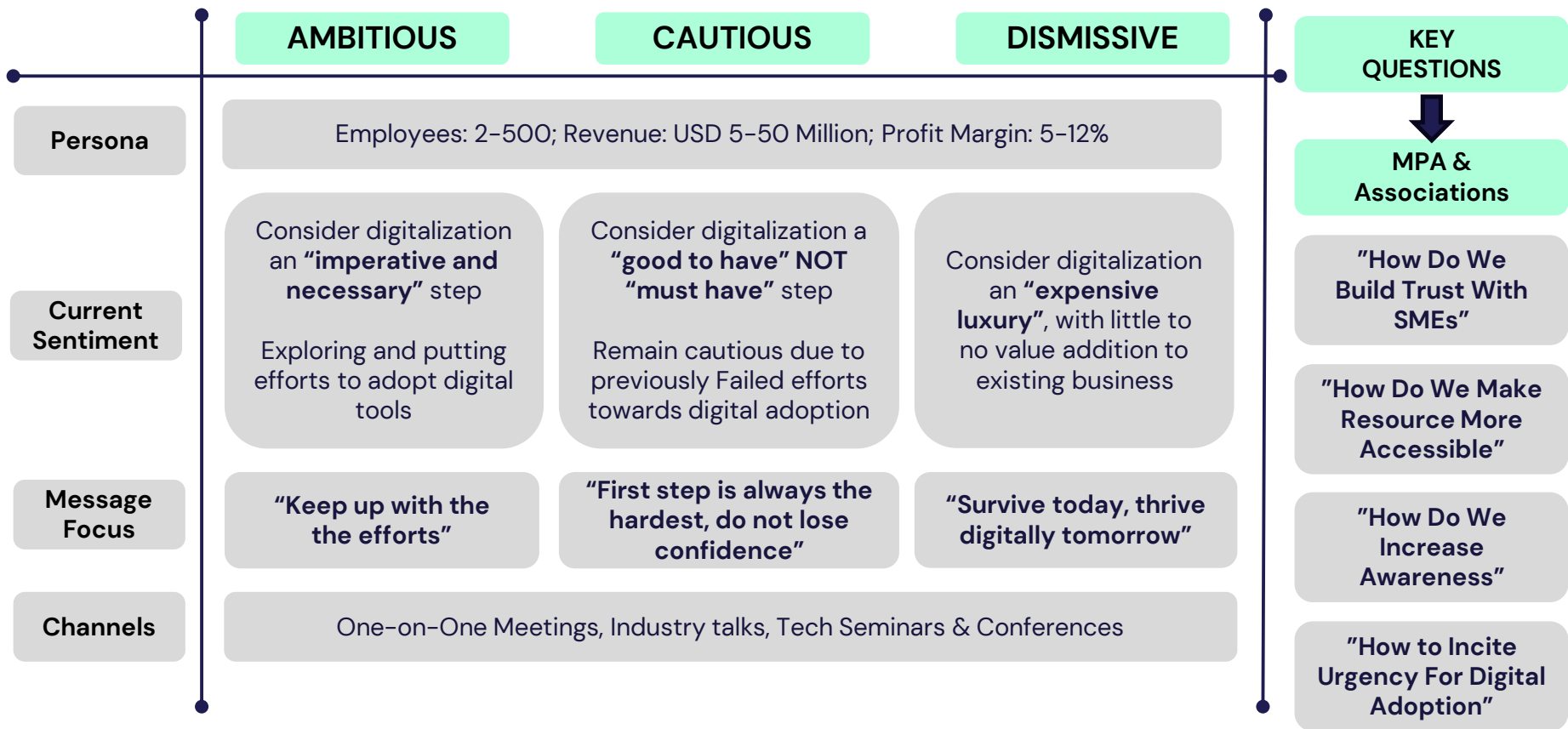- Lack of budget and risk tolerance (Funding)

URGENCY

- "Don't fix what's not broken" and "waiting to see" mindset hinders change
- Marginal gains are seen as insufficient for process changes
- Stuck to legacy processes such as usage of WhatsApp and Email and unwilling to change.

DIGITAL AWARENESS

- Not aware of how to execute on MPA's digital plan
- Lack of understanding of MPA's objectives among management in SME's due to technical capabilities.
- Solutions not customized to business requirements. Lack of understanding on IT Business Strategies

PERSONA BASED COMMUNICATION – SME

	AMBITIOUS	CAUTIOUS	DISMISSIVE	KEY QUESTIONS
				↓
				MPA & Associations
Persona	Employees: 2–500; Revenue: USD 5–50 Million; Profit Margin: 5–12%			
Current Sentiment	Consider digitalization an **"imperative and necessary"** step Exploring and putting efforts to adopt digital tools	Consider digitalization a **"good to have" NOT "must have"** step Remain cautious due to previously Failed efforts towards digital adoption	Consider digitalization an **"expensive luxury"**, with little to no value addition to existing business	**"How Do We Build Trust With SMEs"**
				"How Do We Make Resource More Accessible"
Message Focus	**"Keep up with the the efforts"**	**"First step is always the hardest, do not lose confidence"**	**"Survive today, thrive digitally tomorrow"**	**"How Do We Increase Awareness"**
Channels	One-on-One Meetings, Industry talks, Tech Seminars & Conferences			**"How to Incite Urgency For Digital Adoption"**

03
OVERVIEW
OF SOLUTION

UNIFIED MARITIME PORTAL – DIGITAL WORKPLACE

PRE-IMPLEMENTATION

OUR VISION & MISSION

"To be an integrated maritime hub, through state-of-the-art innovation, while ensuring a sustainable future-ready ecosystem."

"To enhance Singapore's position as a leading global maritime hub, and secure Singapore's strategic maritime goals through digital transformation and integration."

CASE FOR DIGITALIZATION – COMMUNICATING THE URGENCY

CASE STUDY BASED FACTS

Maritime Industry: $5-10 cost saving per document for electronic bill of lading, reduce fuel consumption by 10-20% due to route optimization

Case Study of an organization in the maritime industry: Following the implementation of new digital initiatives, the organization achieved a **15% reduction** in operational costs and a **20% increase in customer satisfaction**

Air Cargo Industry:

- **Cargo Communication Systems:** Connecting stakeholders in the air cargo industry on a common platform. Expected to unlock a value of at least over **$9Bn annually** and save around **120,000 trees** a year
- **Emagic Software:** Read different types of content including emails, text, and images and convert them into instant air cargo quotes. Customers witnessing **54% conversion rate** from this software.
- **IATA's "ONE RECORD" Initiative:** Seamless information flow, real-time visibility, and enhanced collaboration across the supply chain by creating a single record view of each shipment. **Deadline set for airlines to adopt ONE Record by 1 January 2026**

SINGAPORE'S GLOBAL POSITION

Singapore's Position in the Global Market
- World's top maritime centre according to ISCD index for 10th consecutive year
- Fully digitalized and automated port, Tuas Port by 2040.
- Digitalization is key to achieve industry goal of net-zero carbon emissions by 2050
- Market value estimated at $6Bn SGD with estimated annual growth rate of 5%
- In the current global scene, **Digitalization is key to maintain competitiveness and accelerate growth**

THE CASE FOR REGULATORY COMPLIANCE

"PROPOSED DEADLINE TO ONBOARD ONTO DIGITAL WORKPLACE BY 2030"

FORMING COALITION AND ENGAGEMENT STRATEGIES

MPA

MARITIME ASSOCIATIONS

- Singapore Shipping Association
- Singapore Association Of Ship suppliers and Services
- Singapore Shipping Chandlers Association

KEY INDUSTRY LEADERS

MARITIME SME SERVICE PROVIDERS

- Ship Agencies
- Ship Suppliers
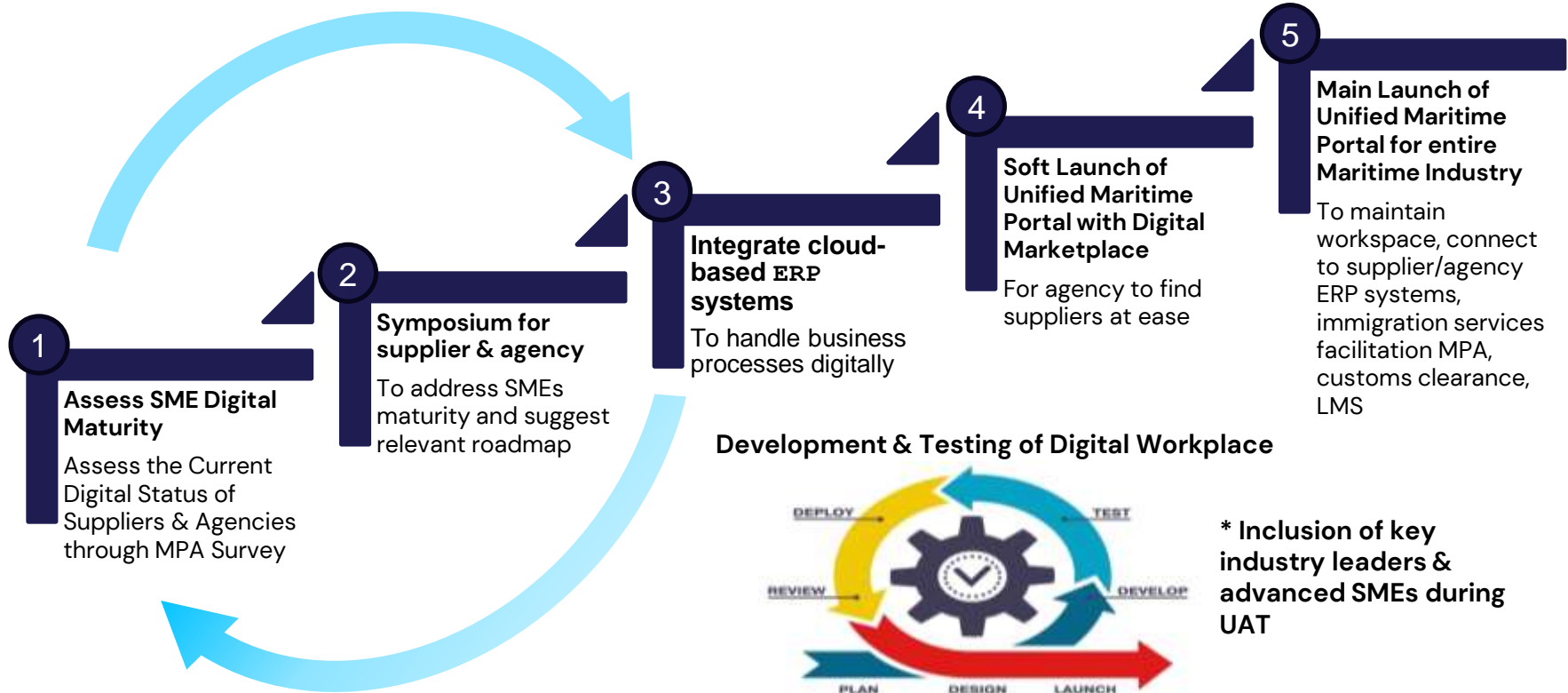- Other SME Service Providers

ENGAGEMENT CHANNELS

ONE-ON-ONE MEETINGS

TECH SEMINARS & CONFRENCES

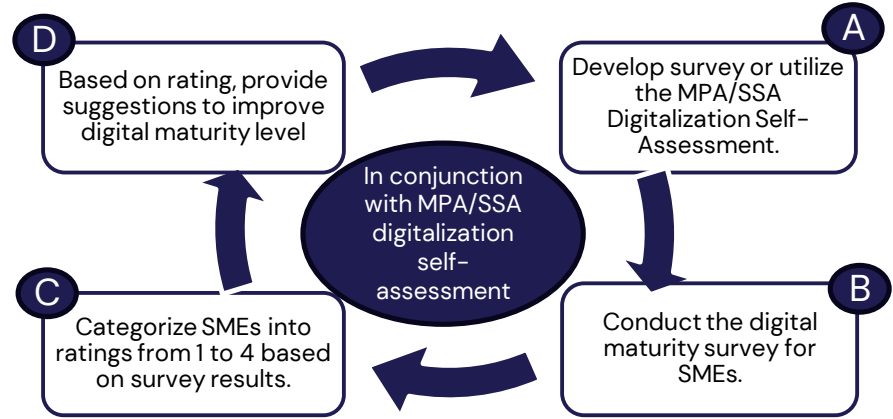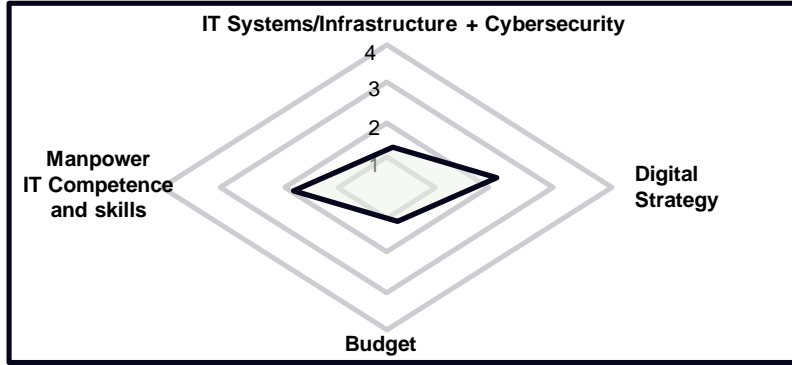INDUSTRY LEADER TALKS

PROPOSED DIGITAL TRANSFORMATION ROADMAP

1

Assess SME Digital Maturity

Assess the Current Digital Status of Suppliers & Agencies through MPA Survey

2

Symposium for supplier & agency

To address SMEs maturity and suggest relevant roadmap

3

Integrate cloud-based ERP systems

To handle business processes digitally

4

Soft Launch of Unified Maritime Portal with Digital Marketplace

For agency to find suppliers at ease

5

Main Launch of Unified Maritime Portal for entire Maritime Industry

To maintain workspace, connect to supplier/agency ERP systems, immigration services facilitation MPA, customs clearance, LMS

Development & Testing of Digital Workplace

* Inclusion of key industry leaders & advanced SMEs during UAT

2025 - 2027

2028

2030

ASSESSING SMEs DIGITAL MATURITY LEVEL

Sample Digital Adoption Maturity Rating

IT Systems/Infrastructure + Cybersecurity

4
3
2
1

Manpower
IT Competence
and skills

Digital
Strategy

Budget

D — Based on rating, provide suggestions to improve digital maturity level

A — Develop survey or utilize the MPA/SSA Digitalization Self–Assessment.

In conjunction with MPA/SSA digitalization self–assessment

C — Categorize SMEs into ratings from 1 to 4 based on survey results.

B — Conduct the digital maturity survey for SMEs.

Rating	Internal IT team	Information Systems	Budget	Cybersecurity	Digital Mindset
1 – Digital Beginner	No inhouse IT team	Manual work Eg: using hardcopies	Very low	Initial	Not digitally aware/pessimistic
2 – Digital Novice	Management team with IT skills	Basic information system Eg: email, excel	Low	Managed	Digitally aware with basic tools & technologies
3 – Digital Native	Vendor IT team	Business process enabled with standalone applications	Medium	Defined	Digitally enabled with basic tools & technologies Digitalized
4 – Digital Expert	Inhouse IT team	Business process enabled with ERP systems	Sufficient	Proactive	Digitalized
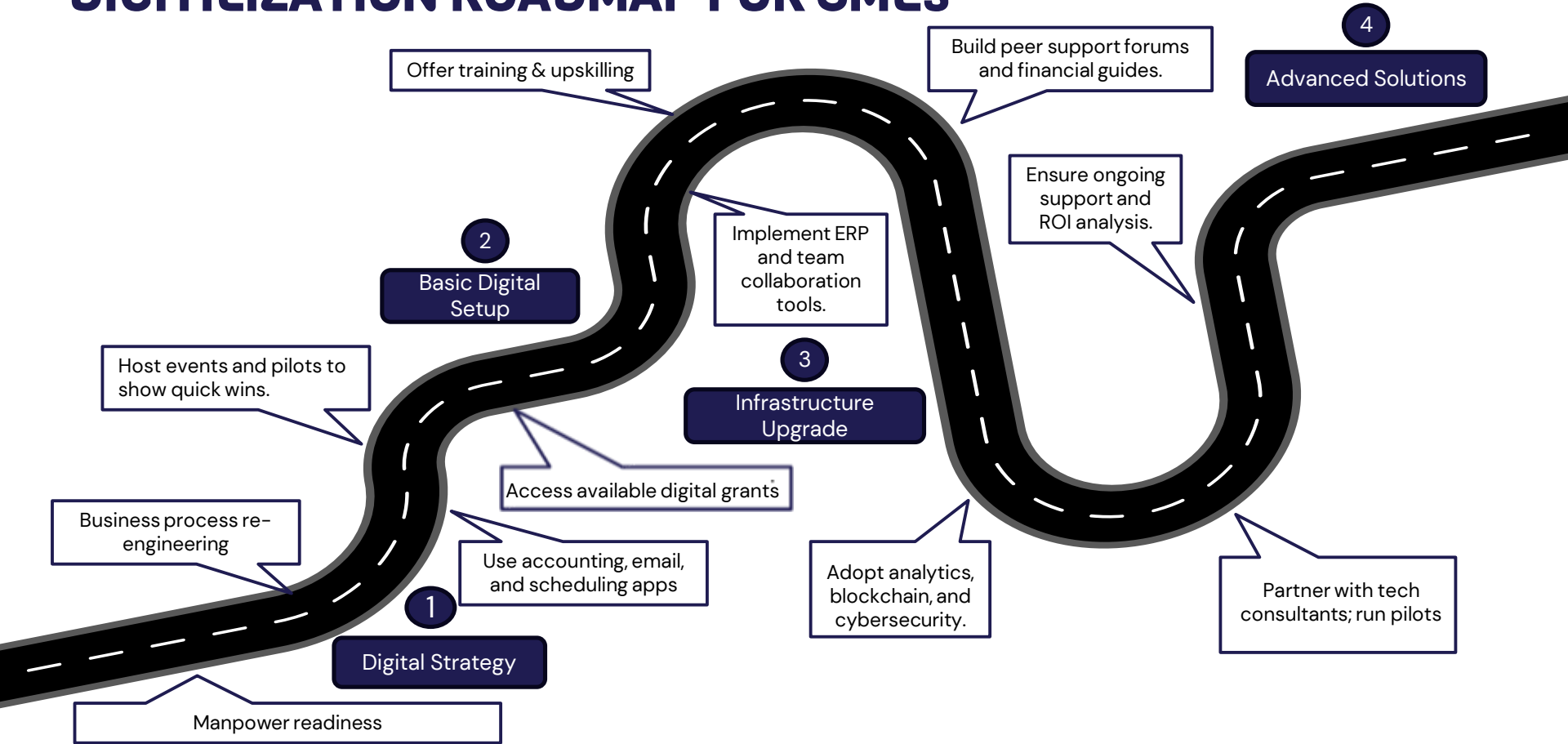
MARITIME TECH SYMPOSIUM

Objective: to bring industry solutions, expert consultants, training and upskilling providers and grants and loans providers to the SMEs

MPA to Discuss SME Digital Readiness & The Need For Digitalization	Facilitate Digitalization Plan For SME' based on their Digital Readiness	Assist In Assessing & Finalising Digital Tool Vendors Based On the Roadmap Created	Gradual Deployment Of Digital Solutions Followed By Regular Review & Feedback
A	B	C	D

SUGGESTIONS BASED ON DIGITAL RATINGS FOR SMEs

RATING 1

Create basic infra – Purpose (Getting Used to Basic Digital Tools)

TECH SOLUTIONS:
- Basic accounting software like Xero or Quick-books
- Basic Email Communication like Zoho
- Digital Scheduling like Google Calendar

EDUCATION AWARENESS & CAMPAIGNS:
- One-On-One Meetings with key industry leaders
- Organize free and low- cost events highlighting the benefits of digital adoption
- Share examples of other industry players who have improved efficiency and profitability through digital tools.

DEMONSTARTE QUICK WINS:
  Pilot Programs:
- risk-free trials of basic digital tools to showcase immediate benefits.
  ROI Illustration:
- show potential cost savings and revenue gains.

SUBSIDIES & GRANTS:
Inform them about government subsidies and grants
- Maritime cluster fund
- Enterprise Development Grant
- Productivity Solutions Grant

RATING 2

Improving infra + adopting ERP

TECH SOLUTIONS:
- Integrated ERP Systems : Solutions like Odoo, Microsoft 365 dynamics and Warehouse Management Solutions.
- Advanced Communication tools: Implement collaboration platforms like Microsoft Teams or Slack

SKILL DEVELOPMENT:
- Training Programs: Provide targeted training to enhance digital literacy and technical skills
- E-Learning Platforms: access to online courses relevant to their industry needs

PEER INFLUENCE:
- Leverage SSA: and other industry influencers or satisfied clients for digital adoption
- Community Building: Create forums or groups where SME's can share experiences and tips

FINANCIAL PLANNING:
- Showcasing the cost benefit analysis to provide detailed analysis to justify investments
- Providing government grants like the Maritime Cluster fund and ESG grant

RATING 3

Advanced Digital Solutions

TECH SOLUTIONS:
   Analytics and AI:
- Tools for demand forecasting and JIT planning – Windward
- Blockchain Technology For secure and transparent transactions – Tradelens, CargoX
- Cybersecurity Measures IDPS, MFA, BITlocker

SKILL DEVELOPMENT:
- Training Programs: Provide targeted training to enhance digital literacy and technical skills
- E-Learning Platforms: access to online courses relevant to their industry needs.

PARTNERSHIP WITH TECH PROVIDERS:
- Co-creation: Work with tech consultants willing to tailor solutions.
- Pilot Projects: Implement small-scale deployments to test effectiveness.

RISK MITIGATION AND FINANCIAL PLANNING:
- Ensure ongoing technical support post-implementation
- Showcasing the cost benefit analysis to provide detailed analysis to justify investments

DIGITAL MARKET PLACE - USECASE

An online platform designed for ship owners to easily connect with agencies and suppliers, providing access to essential services such as bunkering and pilot assistance etc. Users include ship owners, suppliers, and agents, with development managed by a third-party vendor under MPA supervision.

Digital Market Place

SHIP OWNER

- New ship owners can register with a Certificate of Registry.
- Access a list of agencies and suppliers, including service details and costs.
- Post job requirements and choose a vendor.
- Use the payment gateway to pay agents and suppliers.
- Track order status updates.

SHIP SUPPLIER

- Register using [required documentation or registration process].
- View job postings from ship owners and submit quotations.
- Connect with available agents for potential job opportunities.
- Track payments received from ship owners and agents in the payments profile.
- Access order status and provide order updates.

SHIP AGENCY

- Register using [relevant document or registration method, e.g., Agency Certification].
- View job postings from ship owners and submit quotations.
- Access list of suppliers with service details and costs.
- Use the payment gateway to pay suppliers.
- Payments profile to track payments received from ship owners.
- Access order status and provide order updates.

DIGITAL WORKPLACE FOR MARITIME

A unified portal for the maritime industry with unique interfaces for ship owners, agents and suppliers which contains a collection of services that enable new ways of working.

Ship owner interface
- Digital marketplace
- Digital bunkering
- DigiPORT@SG
- Trade-Net
- Port customs clearance
- Berthing arrangements
- Regulatory updates from MPA
- Immigration services

Agent interface
- Access to digital market-place.
- Ship tracking info app
- Integration of Learning Management System
- Regulatory updates from MPA
- ERP Integration

Supplier interface
- Access to digital marketplace.
- Ship tracking info app
- Port customs clearance
- Trade-Net
- Integration of Learning Management System
- Regulatory updates from MPA
- ERP Integration

Regulated by MPA

Developed and maintained by 3rd party vendor

KEY POINTS

Outsource the development and maintenance of Unified portal to external vendor

Portal charges – only for advanced services on modular basis (no charge for basic services)

Unified portal can be accessed using SSO for all users

Cybersecurity team under MPA to regulate data privacy and data security

DIGITAL WORKPLACE - BENEFITS

PRODUCT LEADERSHIP

OPERATIONAL EXCELLENCE

CUSTOMER INTIMACY

SERVICES

Integrated ERP systems (operations, accountancy, scheduling, inventory, supply chain, crm)

Digital Marketplace
DigiPORT@SG

OCEANS-X (API marketplace)

Learning & Development

BENEFITS

Increased Operational Efficiency through cloud-based solutions

Enhanced Collaboration via Digital Marketplace

Sustainability and Green Practices

Improved Compliance and Transparency

Strengthening Competitiveness
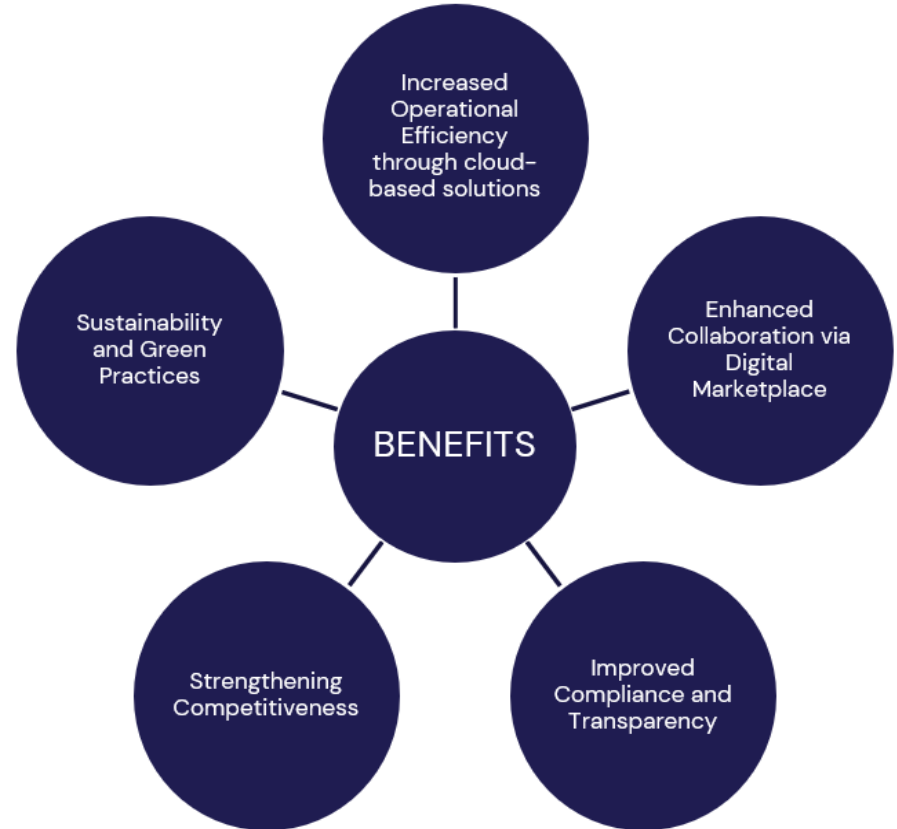
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COST-BENEFIT ANALYSIS
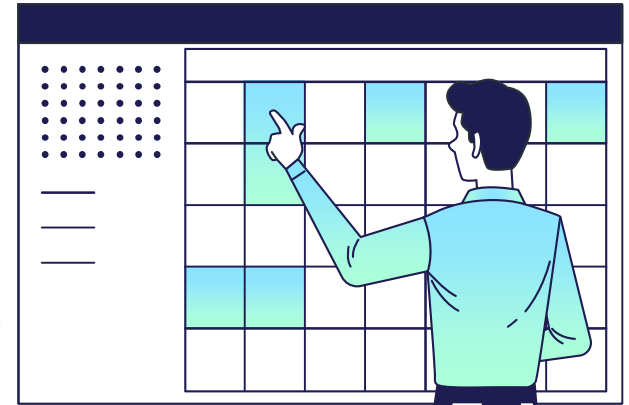
COST FORECASTING

Solutions	Particulars	Costs
Annual Tech Symposium (3 Day Event) (Gathering Size: 100 Companies) (Pax: 200 people)	**Venue Rentals:** (Suntec Convention Centre) – 3x Day X $5000/Day	**$15000**
	Venue Décor & Setup: Technology & Equipment – $2000/Day X 3 Days Maritime & Tech Themed Setup – $1500/Day X 3 Days	**$10,500**
	Speakers & Talent: 3x Industry Leaders X $5000/Speaker X 1 Day 2x Moderators X $1000/Speaker X 3 Day 2x Tech Support/Persona X $500/Person/Day X 3 Days	**$21,000**
	Marketing and Promotion: $5000	**$5,000**
	Food & Beverages: 200x People X $40/Person/Day X 3 Days	**$24,000**
	Total Event Cost	**$75,500**
Unified Portal (12 Months Development)	**Initial Investment:** 1 x Project Manager for $7,000/month 2 x Software Architect for $5,000/month 2 x Data Engineer for $5,000/month 2x Software Developer for $5,000/month **Total Initial Investment:**	$72,000 $1,62,000 $1,20,000 $1,20,000 **$474,000**
	Maintenance & Cybersecurity (Annual) 1x AWS Data Hosting Server for $0.15/GB Data Protection & Encryption Network Admin 1x Software Developer **Total Maintenance Cost:**	$50,000 $18,000 $60,000 **$128,000**

COST BENEFIT ANALYSIS OF SME (SMALL)

Assumptions:

Annual Revenue	<$5 Million	Grants Provided	50%
Employee Size	15-20 People		

Average Order Value	$35,000	
Average Vessel Calls Handled Per Year	100	
%age of more vessel calls handled in 1st Year	5%	
%age of Enhancement in Order Value in 1st Year	15%	

REVENUE METRICS

		Year 0	Year 1	Year 2	Year 3	Year 4	Year 5
New Orders Serviced		0	5	6	7	9	11
Growth Rate				5%	10%	15%	20%
Enhancement in Average Order Value		$0	$5,250	$5,775	$6,353	$7,306	$8,768
Growth Rate				10%	10%	15%	20%
TOTAL REVENUE ENHANCEMENT		$0	$26,250	$34,650	$44,471	$65,754	$96,448

COST METRICS

		Year 0	Year 1	Year 2	Year 3	Year 4	Year 5
Operational Expenditure (%age of revenue)	90%	$0	$23,625	$31,185	$40,024	$59,179	$86,803
Initial Investment		$0	$0	$0	$0	$0	$0
Software Costs (Annually)		$1,000	$3,500	$7,000	$8,750	$11,813	$15,948
Growth Rate			250%	100%	25%	35%	35%
Grants Provided:		$500	$1,750	$3,500	$4,375	$5,907	$7,974
Subsidised Software Cost		$500	$1,750	$3,500	$4,375	$5,907	$7,974
Consulting & Training Cost:							
Training Cost (As a % of Total Cost)	20%	$200	$700	$1,400	$1,750	$2,363	$3,190
Annual Maintenance		$0	$0	$0	$0	$0	$0
Cost optimisation (%age of opex) due to:	5%	0%	0%	5.0%	5.8%	7.2%	9.7%
(i) reduced manual errors							
(ii) better decision making							
(ii) standardised back-end processes							
(ii) Quicker Inventory Turnover							
Growth Rate				10%	15%	25%	35%
Reduction in costs		$0	$0	$1,559	$2,301	$4,253	$8,423
TOTAL COST		$700	$26,075	$34,526	$43,848	$63,194	$89,544

		Year 1	Year 2	Year 3	Year 4	Year 5
TOTAL CASH FLOW		-$700	$175	$124	$623	$2,560	$6,904
WACC	7%						

NPV	$6,501.10
IRR	89%

IRR IS GRRATER THAN WACC

05
RISK
MITIGATION

RISK MITIGATION

Fear of New Technology and Resistance to Change	Cybersecurity Risks	Unemployment and Displacement of Jobs	Fragmentation and Unequal Adoption
Risk • SMEs may resist adopting new digital tools due to concerns over complexity and disruption	**Risk** • Increasing digitization opens the industry to cybersecurity vulnerabilities	**Risk** • The transition to digital could lead to job losses, particularly among workers in ship agencies and smaller maritime SMEs	**Risk** • Different adoption rates across SMEs could create fragmentation, leaving some businesses behind
Mitigation • Offer simple, modular tools that allow incremental adoption. Run training and change management programs that emphasize the long-term benefits of digital adoption	**Mitigation** • Implement industry-wide cybersecurity standards and offer cybersecurity training to all users of the digital workplace. Leverage partnerships with AWS for secure cloud solutions	**Mitigation** • Provide reskilling programs for workers displaced by automation and create new job roles around the digital workplace, such as data analysts and digital engineers	**Mitigation** • Implement a phased approach with clear industry-wide benchmarks and government-led incentives to ensure all players are on board

06
SUPPLY

SUPPLY

TECHNICAL EXPERTISE

ERP Solutions

- SMEs should train select team members in basic technical skills.

- Trained members will facilitate communication with ERP solution vendors.

- Ensures smoother collaboration and implementation of ERP systems.

NON-TECHNICAL EXPERTISE

Symposium

Event and management team under MPA to engage SMEs on the unified portal and digital transformation roadmap.

Maturity Assessment
Management consultants under MPA to develop and conduct SME maturity assessments.

Maturity Categorization Business analysts to categorize SMEs by rating and provide improvement suggestions.

Regulatory Body
MPA team with data governance expertise to oversee the vendor-developed workplace.

OUTSOURCING

Digital Marketplace

Need a vendor with expertise in digital marketplace development to develop and maintain the marketplace.

Digital Workplace

Need a vendor with expertise in digital workplace to integrate the various services under one application.

Thank you

REFERENCES & APPENDIX

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PERSONA BASED CLASSIFICATION

	AMBITIOUS	CAUTIOUS	DISMISSIVE
CURRENT SENTIMENT	• Developed tailor made operational software & implemented an industry recognized software for accounting department • Experimentation of other operational software like email filtering system • Consider technology as a **"must-have"** thing to remain competitive	• Failed implementation of digital solutions like accounting software. Therefore, remain cautious to experiment something new • Self-awareness about their lack of expertise and resources to access latest technologies in the market • Consider digital tools as a **"good-to-have, not a must-have thing"**	• Mostly manual-based business process with no urgency to adopt digital solutions
KEY CONCERNS	• Pre-approved solutions provided by MPA do not fit their business requirements • SMEs not involved in the process of creating the pre-approved solutions • Current workforce already multi-tasking and do not have the bandwidth to experiment new solutions	• Do not have a digitalization roadmap and are not aware of how to proceed with the process of digitalization • Do not have the funds to allocate on an in-house IT team	• Consider it as a "luxury" option to adopt digital solutions as they are very expensive • It would cause extreme disruption to their existing business, for which they believe will not have a significant enhancement

SWOT ANALYSIS

S W O T

	Ambitious	Cautious	Dismissive

Ambitious

- Have basic IT solutions (eg accounting software – Xero)
- Real time experience of how digital transformation can influence business.

- **Unable to catchup with MPA Objectives.**

- Can handle more customers when IT solutions are implemented successfully.
- Become market leader since the processes are optimized.
- Can make business decision based on data analytics.

- Might lose capital if digital solutions doesn't work.
- **Cybersecurity threats for their data since they might not have an cybersecurity team.**

Cautious

- **Have an idea how digital transformation can transform business and can learn from ambitious persona.**
- **Have access to latest IT solutions in the market.**

- Failure in implementing IT solutions.
- Unable to catch up with MPA Objectives.
- Unable to attract talent for digital transformation.
- Cannot pay upfront cost for digital solutions.

- Successfully implementing digital solutions can attract new businesses.
- Can increase customer experience through real-time tracking and updates.

- Might face significant financial losses if digital transformation are unsuccessful.
- Short-term productivity decline during the digital transformation transition phase.

Dismissive

- **Have a solid customer network without use of technology**

- Not aware how digital solutions can influence business.
- Lack of confidence in implementing digital solutions.
- Lack of Funds and lack of transition time.

- Can reduce operational expenses by implementing basic digital solutions.
- Can attract new customers who opt for digitally enabled service providers.

- Might face bankruptcy when digital solutions not implemented successfully due to high cost involved in basic infrastructure setup.
- Might lose business to competitors if they don't implement digital solutions.

PERSONA	AMBITIOUS	CAUTIOUS	DISMISSIVE
What's in it for me? (WIIFM)	- Clarity on better process optimization - Exploration into new and better solutions to replace or complement what has already been adopted - First-hand experience with latest IT solutions in the market or by upcoming start-ups - Training and upskilling support to continue improving operations - Monetary support in terms of grants from MPA, IMDA, ESG, etc.	- Process optimization solutions that are catered well for their business - Training and upskilling support in IT and relevant fields that are necessary to better understand the importance and impact that digitalization offers to the industry. - First-hand experience with latest IT solutions in the market or by upcoming start-ups - Monetary support in terms of grants from MPA, IMDA, ESG, etc.	- Insights and strategies to aid in building and improving on current IT infrastructure. - First-hand experience with industry-recognized ERP solutions that can optimize and bring better value to business operations - Basic upskilling in IT and relevant fields - Monetary support in terms of grants from MPA, IMDA, ESG, etc.
Benefits & Outcomes	- Improved decision-making on available solutions and what will work best for the business - Recognition as industry leaders in terms of current business processes and the opportunity to play a leading role towards digitalization in the maritime industry - Better streamlined processes with increased efficiency and better resource allocation, resulting in reduced operational costs and higher productivity - Opportunities for innovation to create their own solutions and to work with tech firms/start-ups to bring these solutions to life for the industry - Attainment of sustainability goals	- Implementation of solutions that are best fit to the business which will streamline processes, increase operational efficiency and provide better resource allocation - Optimization and Improvement of current business processes to adapt to the evolving industry - Recognition as upcoming and "best-improved" in the industry and can be seen as an example to follow - Upskilling for workers to continue to stay relevant within the industry and the current evolving IT scene - Assurance that they will not be left behind while the industry shifts towards digitalization	- Implementation of basic IT infrastructure and accounting/ERP solutions to kick-start their digital/IT journey and to start reaping the benefits of these solutions. - Improved operational efficiency, lead times, optimization of business processes, reduced operational costs - Setting-up the foundation for continuous improvement and adaptation to the ever-evolving industry - Assurance that they will not be left behind while the industry shifts towards digitalization - Upskilling for workers to continue to stay relevant within the industry and the current evolving IT scene

- Cloud-Based Enterprise Resource Planning (ERP) Services
- Launchpad for start-ups
- Infrastructure support and enhancement solutions
- Eg: Xero, Dynamics

- Training programs
- Information Technology
- Maritime-Specific

Tech Solutions

Upskilling

Grants & Subsidies

Strategic Solutions

- Maritime Cluster Fund
- Singapore Maritime Institute fund
- Enterprise Development Grant
- Productivity Solutions Grant

- CTO as a service
- SME centers
- Thought Leadership

CONSULTS & WORKSHOPS

GRANTS

LEARNING & DEVELOPMENT

Cloud-based ERP and Integration Solutions
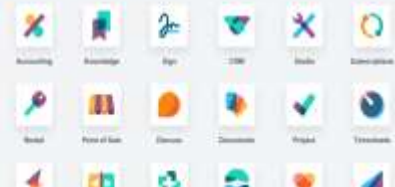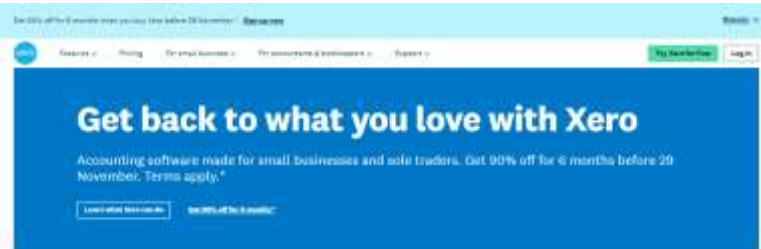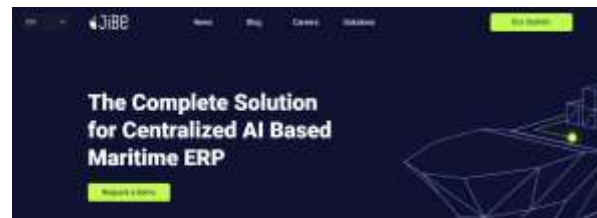
DIGITAL WORKPLACE SOLUTION PROVIDERS RANKED BY GARTNER