



Intelligence, Technology & Advice

Company Profile

Hamburg, October 2008

Agenda

- ☒ **Company Profile**
- ☐ **Consulting Services**
- ☐ **Solutions**
- ☐ **Market Intelligence**
- ☐ **Contact**

Overview

ITA Consulting is a rapidly expanding consulting and development firm specialized in the field of Logistics...

Approach

- Based and active in Hamburg in 1995, ITA Consulting **combines industry-specific managerial experience and consulting competence** with extensive **process-, technology- and practice know-how**. Consequently, we are able to **advise** our clients **throughout the entire value chain**, from market analysis, strategic development to process optimization.

Key Competencies

- The **key consulting competencies** prevalent at ITA Consulting are in the fields of **Corporate Strategy, Mergers and Acquisitions, Business and Market Intelligence, Product and Price Positioning**, as well as **Transport and Supply-Chain management and optimization**.

References

- **International logistics service providers** like **DHL, La Poste / GeoPost and TNT** as well as **large retail, industry and service corporations** such as **Arvato, Infineon and KNV** rely on our competence. **Numerous successfully completed projects** illustrate our **broad experience** in planning and implementing the solutions proposed by our experts.

Entrepreneurial Spirit

- **ITA Consulting** takes **entrepreneurial initiative** when it identifies unsatisfied market demand and new business opportunities. **In 2001, ITA launched the first neutral eShipping platform** for sourcing and fulfillment of transport services in Europe **LetMeShip** and in 2005 developed the news and market intelligence portal **CEP-Research**, specialized in the global Express and Postal Industry.

Activities Overview

ITA operates 4 business streams:



Consulting

Management Consulting

- Strategy and Management
- Mergers & Acquisitions
- Business Intelligence
- Process Optimization
- Supply Chain Management
- Sourcing & Procurement
- IT-Strategy
- Commercials

Solutions

IT Solutions

- Transport Management
- Shipping Solutions
- Business Intelligence
- Content Management Systems
- Supply-Chain
- Individual Development
- Technology Consulting

CEPRESEARCH

Market Intelligence

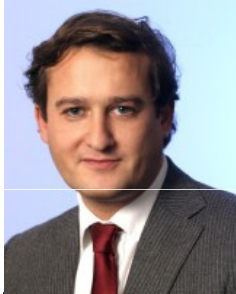
- Industry reports
- Country reports
- Price-benchmarking
- Market overviews
- Market research
- CEP-Newsletter
- Customer-specific newsletters (competition-watch, evaluation of current market developments)
- Conferences

LetMeSHIP

Retail

- Online-Booking for B2C and B2B clients
- Online price-comparison (costs, delivery time, products)
- Shipping Optimization
- Central Clearing
- Cost Optimization
- Business Service

Management Team



Boris Winkelmann

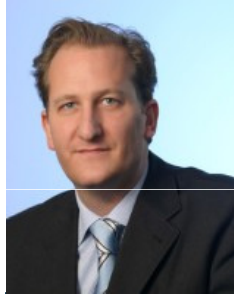
- ▶ Managing Director
- ▶ M&A, Strategy, Consulting
- ▶ Age: 38
- ▶ Phone: +49 (0)40 380 879 12
- ▶ Email: BWinkelmann@ita-consulting.com

Boris Winkelmann is a graduate of the European Business Program in Bordeaux and Münster, and also holds a Master of Finance degree from the ICADE University, Madrid. His career began in 1994 in the marketing department of the TNT Express Worldwide corporate headquarters in Amsterdam.

In 1997, he took on his first operational post as General Manager for Greece and the Balkan states. At the beginning of 2000, he moved to France's La Poste to assist in the internationalisation of the express and parcel division GeoPost with responsibility for Mergers & Acquisitions. He was involved in the acquisitions of Deutscher Paket Dienst (DPD) as well as numerous joint ventures and strategic alliances in Germany and Europe until 2001.

At the beginning of 2002 Boris Winkelmann moved to ITA Logistics as Managing Director to advise and develop business consulting. He manages the Strategy and M&A consultancy activities and is responsible for the development of the company.

Boris Winkelmann holds board membership positions at Secur (Spain), Sodexi (France) and Yurtici Kargo (Turkey).



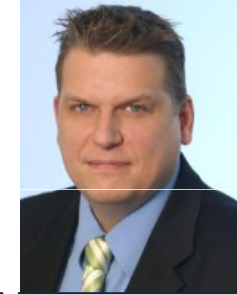
Mark Winkelmann

- ▶ Managing Director
- ▶ Consulting and Research
- ▶ Age: 35
- ▶ Phone: +49 (0) 40 380 879 10
- ▶ Email: MWinkelmann@ita-consulting.com

Mark Winkelmann is a graduate of the European Business School. His professional career began in 1996 in the corporate headquarters of DHL Worldwide Express in Brussels in the international strategic planning and market research department.

From 1998 onwards, as intranet manager, he took responsibility for the development of eShipping solutions for major clients of the firm. In 1999 Mark Winkelmann moved to ITA Logistics as Managing Director and developed "LetMeShip", the first business model and multi-carrier web-shipping system. In 2004, the development of "CEP-Research", the news and information platform about the courier, express and postal market, followed.

Mark Winkelmann manages the Consulting and Research activities focusing on the CEP (Courier, Express and Post) market and is responsible for the daily operations of ITA Logistics.



Peter Weber

- ▶ Managing Director
- ▶ IT Solutions, Freight & Logistics
- ▶ Age: 40
- ▶ Phone: +49 (0) 40 380 879 30
- ▶ Email: PWeber@ita-consulting.com

Peter Weber studied IT at the University of Paderborn. His professional career commenced as a freelance software developer for Bertelsmann Distribution GmbH in Gütersloh. The main focus of his activities was the development and implementation of Track & Trace and Transport Management solutions.

After holding different positions as project and development leader at the MRU consultancy and Active Logistics, the freight forwarding software developers, he joined ITA Logistics in the middle of 2005.

Peter Weber manages the IT Solutions, Logistics and Freight consultancy activities and is responsible for technology and transport management solutions.

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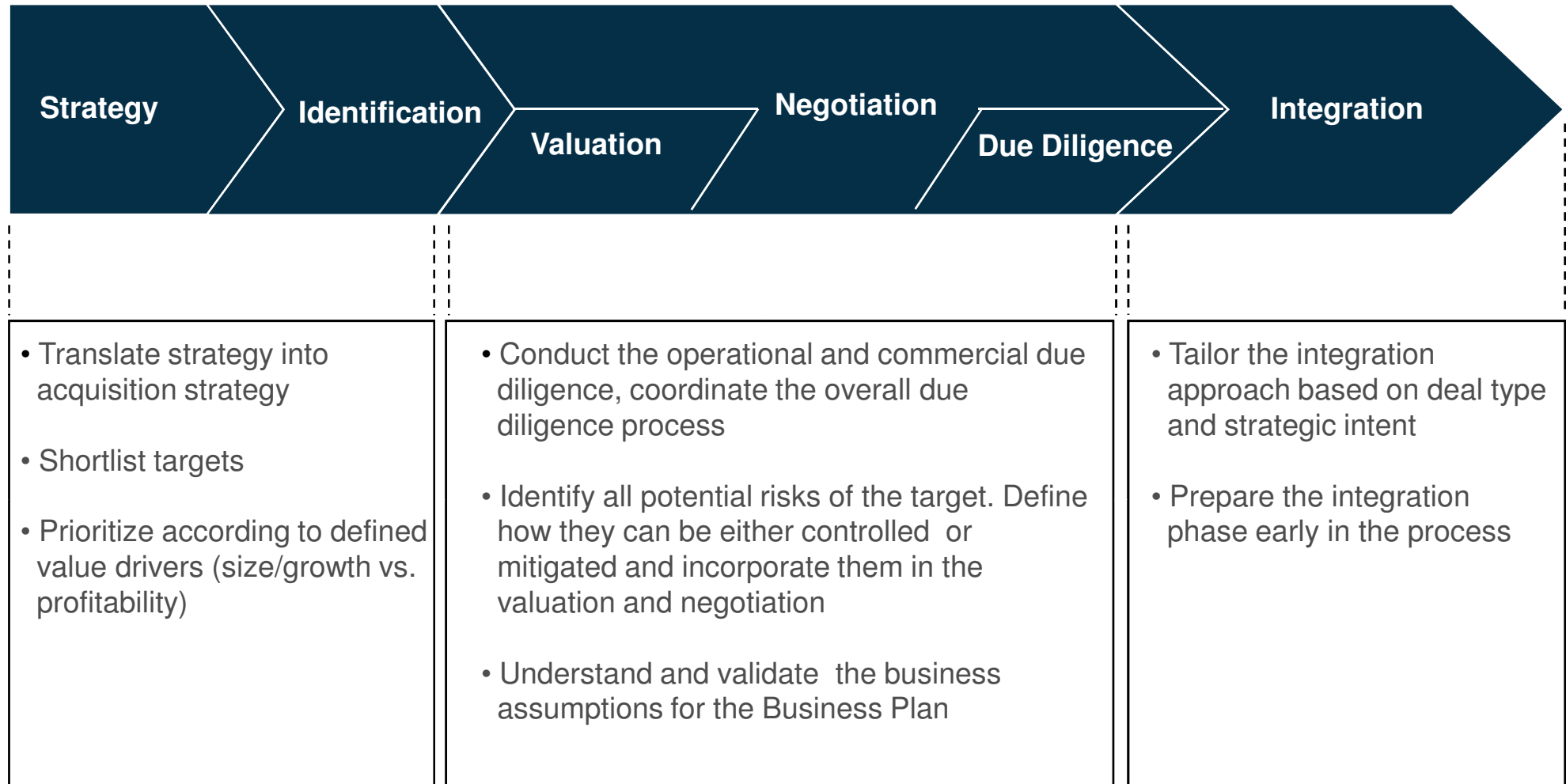
Consulting Services

The ITA Consulting Team is an international, flexible task force of Logistics specialists

Know-How	More than 30 experienced experts combine strategic skills of classic management consulting with the industry-specific know-how of the logistics sector .
Focus	<p>The Consulting focus is on:</p> <ul style="list-style-type: none">• Strategic and operational development of logistics service providers as well as the optimization of their organization and processes• Optimizing of logistic processes of Retail and Industrial companies on the other hand
Topics	<p>The emphasis of consulting services comprises:</p> <ul style="list-style-type: none">• Strategy and development• Mergers & Acquisitions• Business Intelligence• Organization• Process-Optimization• Network Optimization• Supply-Chain Management• Inventory Management• Sourcing and Procurement• Transport Management
International Scope	Despite its German home base , ITA has successfully lead projects in a variety of countries in Europe such as France, BeNeLux, Switzerland, Balkans as well as Emerging markets such as Russia, Ukraine, India, China, and Turkey.

Selected Competences - Mergers & Acquisitions

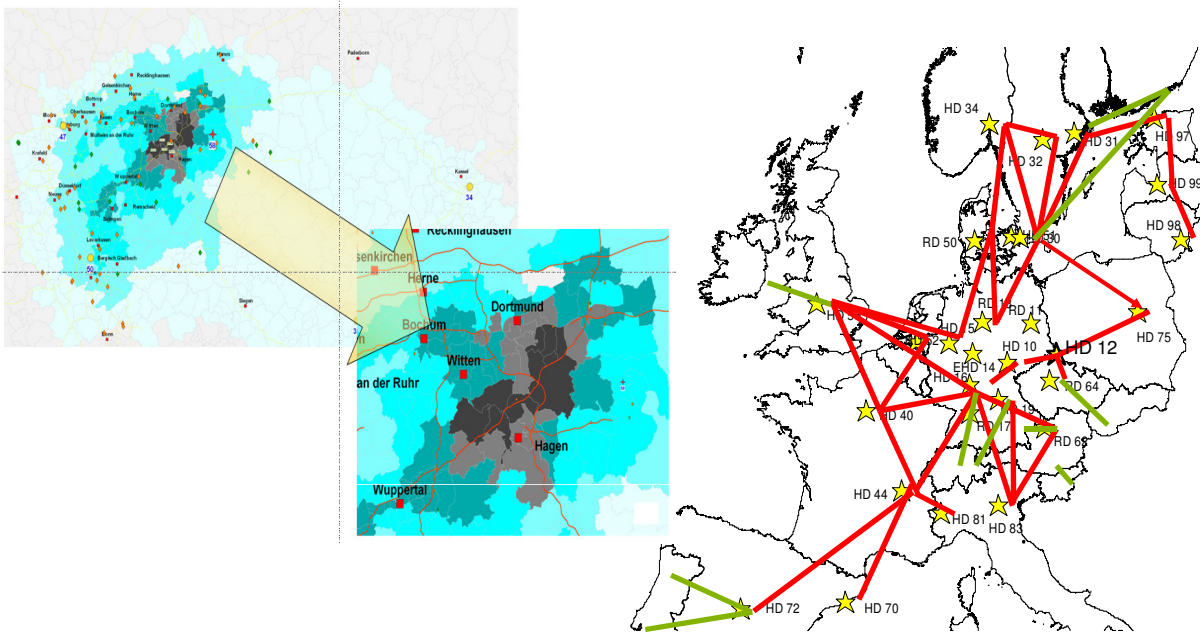
ITA Consulting can assist clients throughout the entire M&A process...



Selected Competences - Network Optimization

Assists in improving the efficiency of distribution networks...

Network Optimization



Expertise

► Network Optimization

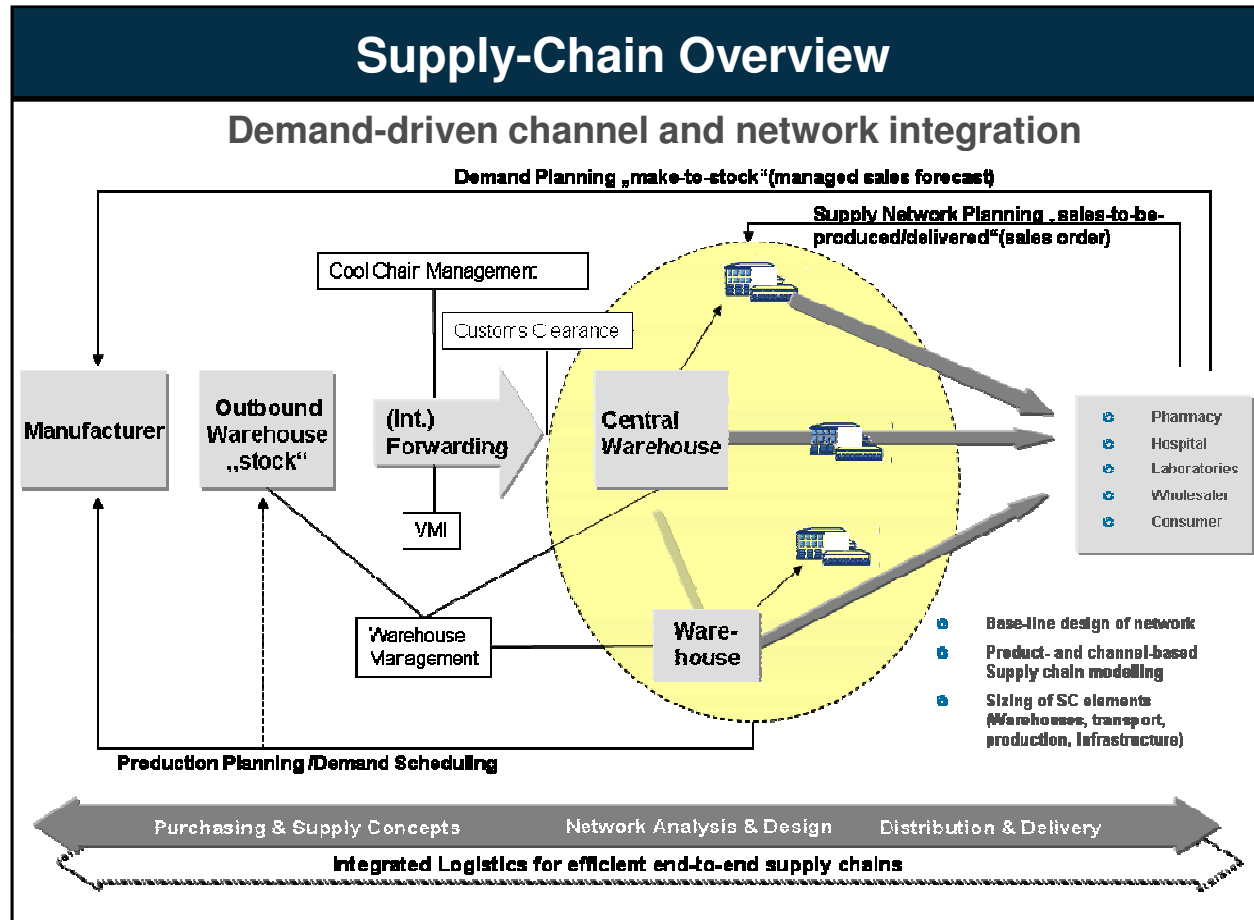
- Depot structure and planning
- Cut-off times
- Location planning
- Process optimization
- Network efficiency analysis
- Iterative methods to facilitate capacity peaks
- Loading Capacity/ utilization

► Network Redesign

- International Network management
- Capacity management
- Loading grid optimization
- Contribution management

Selected Competences - Supply Chain Management

Provides expertise to optimize the Supply-Chain management



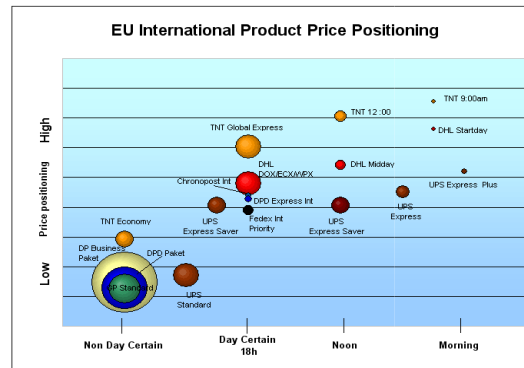
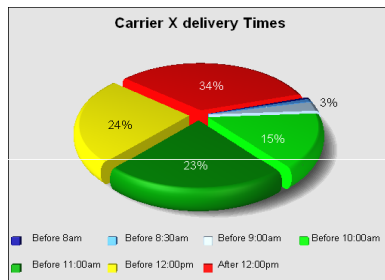
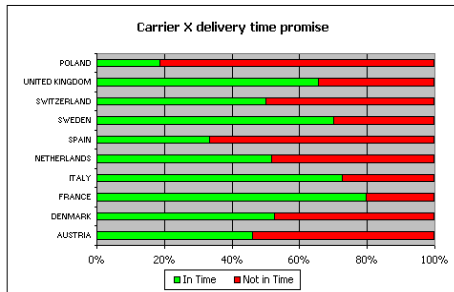
Expertise

- ▶ **Forecasting and demand-planning**
 - Volatility, Accuracy, Error handling
 - SOP-Consolidation and Execution
- ▶ **Operational integration for efficient distribution networks**
 - Purchasing / Production
 - Warehousing
 - Distribution
 - Point-of-Sale / Consumer
- ▶ **Integrated supply concepts: Efficient operating models through standardization of key-processes**
 - Channel based delivery
 - Regional distribution networks
 - KANBAN
 - Just-in-time
 - VMI

Selected Competences – Commercial Disciplines

Provides advice on pricing policy and service quality analysis...

Commercial Disciplines



Expertise

- ▶ **Price and product competitiveness**
 - Product feature analysis
 - Pricing analysis
 - Overall product positioning on the market
- ▶ **Revenue Management**
 - Discount policy evaluation
 - Modelling of discount discipline impact
 - Risk evaluation
 - Conversion methodology design and recommendation
- ▶ **Service Quality**
 - Analysis and comparison of the actual transit times with the listed transit times.
 - Analysis of the success rates of "On Time" deliveries

Project References

La Poste: Commercial Due Diligence PIN AG



- ▶ Operational analysis
- ▶ Identification of commercial risks and opportunities
- ▶ Conceptual framework design for potential future operational model
- ▶ Evaluation and ranking of regional group companies
- ▶ Preparation of recommendation study

DHL Germany Regionalization



- ▶ Logistic Strategy and Development
- ▶ Identification of synergies in merged business units
- ▶ Introduction of a regional structure for enhanced communication and synergies
- ▶ Implementation of Service levels

GeoPost Acquisition of Armadillo Zao



- ▶ M&A consulting and strategy
- ▶ Market analysis
- ▶ Business plan validation
- ▶ Due diligence supervision
- ▶ Target valuation (DCF, sensibility analysis)
- ▶ Negotiation of material agreements

Kantonsspital St Gallen Restructuring SCM processes



- ▶ Hospital logistics & Pharmacy
- ▶ Design of supply and distribution networks for medical devices, generics, RX and OTC
- ▶ In-house distribution
- ▶ Integration of in-house distribution with supplier networks
- ▶ Integrated forecast and automated material planning

Millitzer & Münch Turnaround EMEX Russia



- ▶ Freight Forwarding/ Parcel
- ▶ Process reengineering and redesign of organizational structures
- ▶ Financial and operational analysis
- ▶ Formulation of recommendation catalogue
- ▶ Implementation of restructuring plan
- ▶ Coaching & Handover

DPD Network Monitoring



- ▶ Strategy Consulting and IT solutions
- ▶ Optimization of data flows within the European parcel network
- ▶ Implementation of a pan-European network monitoring tool
- ▶ KPI formulation for performance measurement

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Services – ITA Solutions

ITA Solutions offers a wide range of services around the evaluation and implementation of IT solutions

Know-How

ITA Consulting advises its customers in all their challenges regarding the **evaluation and implementation of IT solutions**. The solutions team combines deep logistics know-how with long experience in IT business.

Focus

The focus is on the **optimization of client processes** in order to **cut costs and secure competitive advantages**.

Topics

The solution team competences in sourcing, developing and implementing IT-Solutions cover the following areas:

- Business Intelligence Solutions
- Transport Management Systems & Supply Chain Solutions
- Online Shipping Solutions
- Content Management Systems
- Sourcing and Procurement
- Technology Consulting

Selected Project References

KNV Lead Logistics Provider



- ▶ Lead Logistics Provider
- ▶ Development and implementation of an integrated transport management solution (KNO shipper)
- ▶ Assessment of existing tools for the intern forwarding agency, subsequent benchmarking and selection

Infinion AG Track and Trace



- ▶ Implementation of the "tracking and tracing" module
- ▶ Design and integration of the "tracking translator" to simplify interpretation of tracking data
- ▶ Reporting tools

Arvato Transport Management



- ▶ Conception and implementation of vva-info.de "tracking and tracing" system for Bertelsmann Vereinigte Verlagsauslieferung
- ▶ Conception and implementation of arTIS (arvato Transport Management Information System)
- ▶ Integration of customers on arTIS (Vodafone, Microsoft, ...)

DHL Freight Germany Yield Management



- ▶ Support of yield management by developing suitable KPI's regarding customer profitability
- ▶ Consolidation of operational data streams
- ▶ Enabling of adhoc analysis on the basis of hard (profit margin) and soft indicators (network implications)

GeoPost Germany Customer Profitability Mgt.



- ▶ Co-development of a business intelligence solution
- ▶ Analysis of customer and product profitability
- ▶ Identification and allocation of actual cost
- ▶ Analysis of network implications

DPD Online shipping



- ▶ Conception and implementation of "Online ordering" portal "DPD Onlineversand"
- ▶ Efficient online solution for adhoc customers
- ▶ Automation of decentralized business processes
- ▶ Hosting and technical support

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CEP-Research

Intelligence and Facts for the Courier, Express and Postal Industry

CEP-Research

- ▶ Launched in 2005 as the first Europe-based internet portal specialized in the worldwide Courier, Express and Postal market
- ▶ Online information & research platform for the worldwide CEP market
- ▶ > 2500 customers have easy access to the most relevant information and reports about the Courier, Express and Postal market



Editorial

- ▶ Daily News on CEP-Research website
- ▶ Daily and weekly newsletters
- ▶ Breaking News
- ▶ Exclusive Briefings
- ▶ Customized news products designed and produced in line with customer requirements containing news, analysis, exclusive added-value contents and special features.
- ▶ Product examples:
 - Weekly news compilation and analysis
 - Monthly news compilation and analysis
 - Quarterly industry / market trends and analysis
 - Annual industry / market trends and analysis

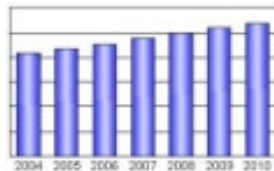


CEP-Research

High qualitative, specialized Market Intelligence

Market research

- ▶ Market Studies
 - German postal market before liberalisation
 - Internet Service Analysis of Major CEP Companies
 - Product & Price Positioning Studies
- ▶ CEP Market Fact Sheets
 - CEP Market Analysis
 - Product offering
 - Company profiles
- ▶ Customised Market Research
 - Primary and Secondary Research
 - Market Analysis
 - Competitor profiles
 - Mystery Shipper
 - Trade Lane Report
 - Competitor Benchmarking



Reference Projects

- ▶ Analysis of a competitor market entry
- ▶ CEP market for small and medium sized companies: market analysis & competitor benchmarking
- ▶ Survey and analysis of intercontinental good flows
- ▶ Volumetric weight analysis
- ▶ Trade lane Europe to US
- ▶ Detailed market size / shares in various CEP Markets
- ▶ National postal companies of certain core markets – profiles, descriptions of alliances, assessments of strategic developments
- ▶ Strategies of universal service providers and integrators
- ▶ Providers of in night services – profiles and contacts
- ▶ Deep profiles of certain transport companies as a preliminary stage for the initiation of partnerships
- ▶ Customer interface and customer-related performance benchmarking

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