



**CLUSTER
FOR
LOGISTICS**
LUXEMBOURG
ADDING VALUE IS THE KEY.



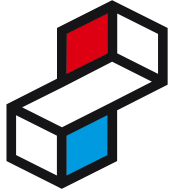
THE GOVERNMENT
OF THE GRAND DUCHY OF LUXEMBOURG
Ministry of the Economy

C4L Member Survey on Digital Transformation in Transport and Logistics

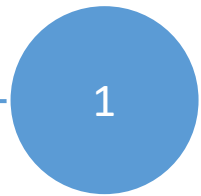
C4L Spring Conference
June 2022
Cluster for Logistics Luxembourg

ADDING VALUE IS THE KEY.

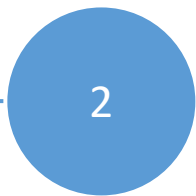
SINCE 2009



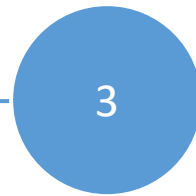
Agenda



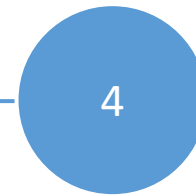
Key data
of the survey



Internal implementation
of digitalization processes



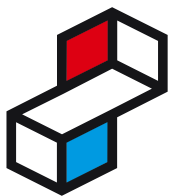
Handling and
processing of data



Excursus: Electronic
delivery notes



Key Results & Action
Points



1. Key data of the survey

Survey period | Company size | Company activities



Key data survey

Survey period:

01/02/2022 to 04/03/2022

Pool of participants:

Members of the C4L (n=92)

Participants:

39 Companies (n=39)



Key survey topics

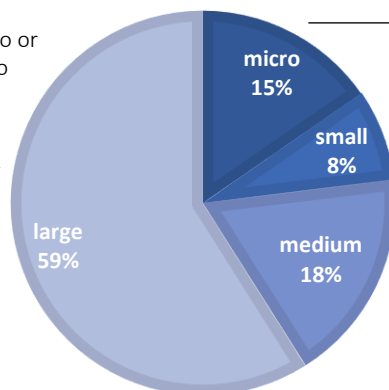
1. Internal implementation of digitalization processes
2. Handling and processing of data
3. Excursus: Electronic delivery notes



Company size

Headcount and turnover or balance sheet

HC: >250;
TO: >50 million euro or
BS: >43 million euro



HC: <10;
TO: ≤2 million euro or BS: ≤2 million euro

HC: <50;
TO: ≤10 million euro or BS: ≤10 million euro

HC: <250;
TO: ≤50 million euro or BS: ≤43 million euro

n = 39

HC: Headcount

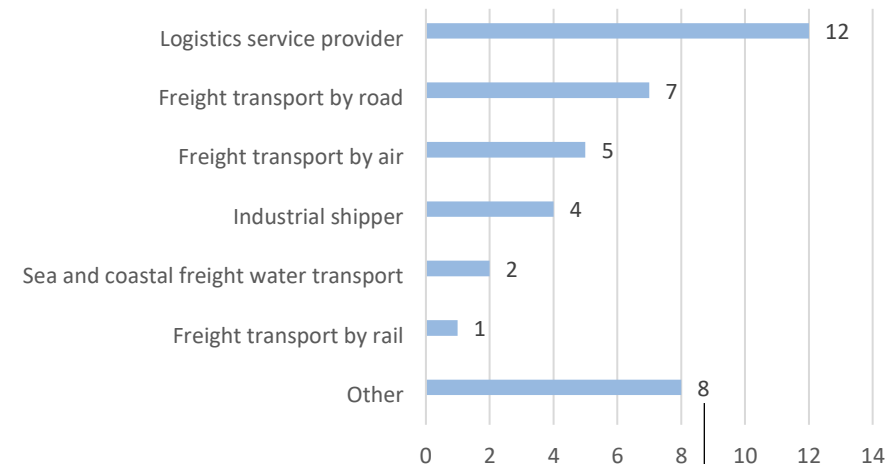
TO: Turnover

BS: Balance sheet



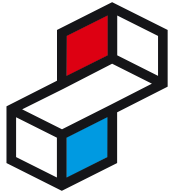
Company activities

NACE CODE



n = 39

Other: e.g., ground handler, warehouse construction, last mile, consultancy, platform provider, etc.



2. Internal implementation of digitalization processes

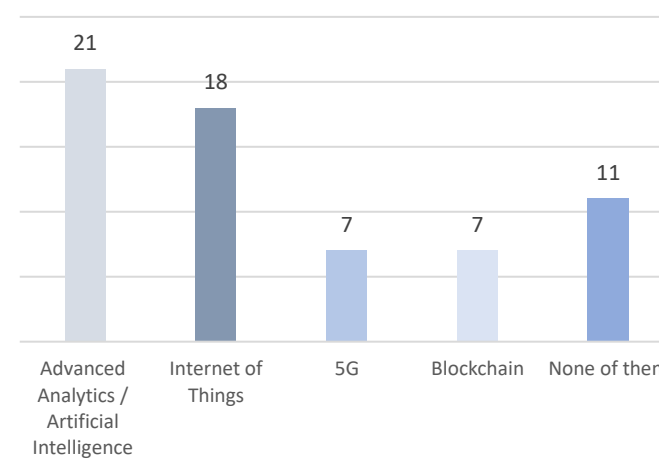
Main Use Cases | Investigated Technologies | Maturity of Projects

Which of the following do you consider as the main use case(s) for the digital transformation of your transport and logistics processes?



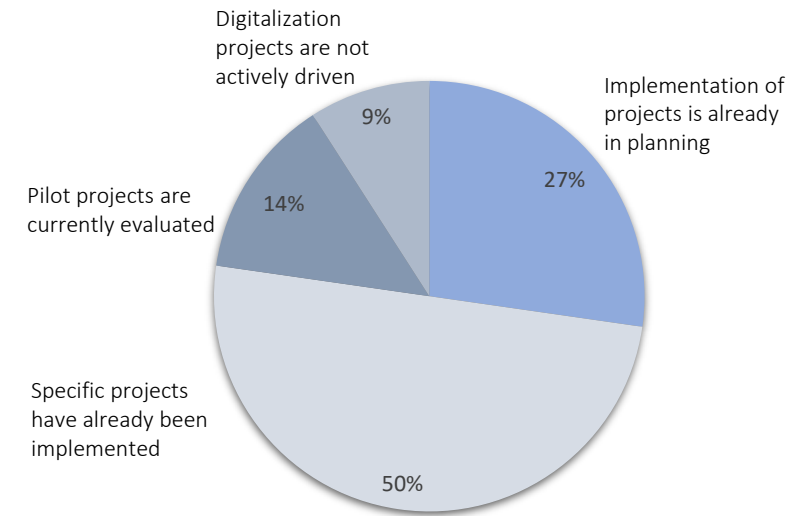
n = 39
Multiple answers were possible

Have you investigated one of the following technologies in the context of the digital transformation of your transport and logistics processes?

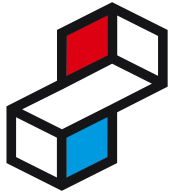


n = 39
Multiple answers were possible

How would you rate the maturity of your company's digitalization projects?



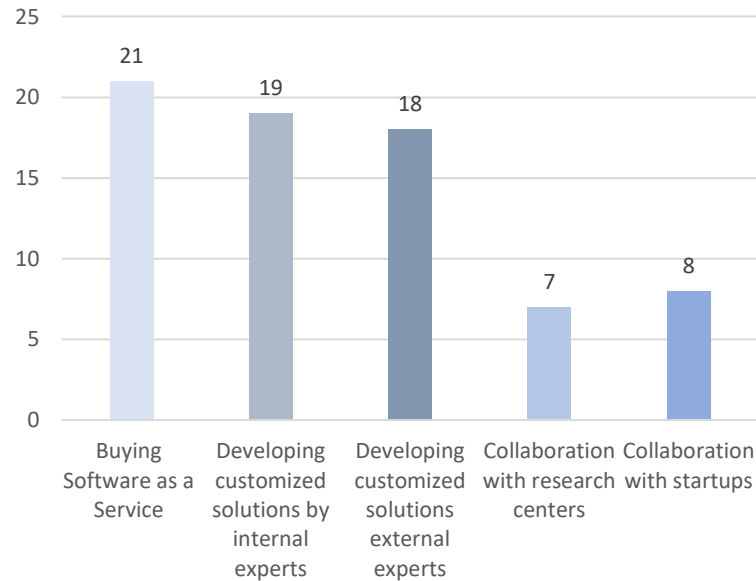
n = 39
Only a single answer was possible



2. Internal implementation of digitalization processes

Development of Projects | Barriers to Innovation | Skill & Talent Challenges

How does your company proceed to put digitalization projects into practice?



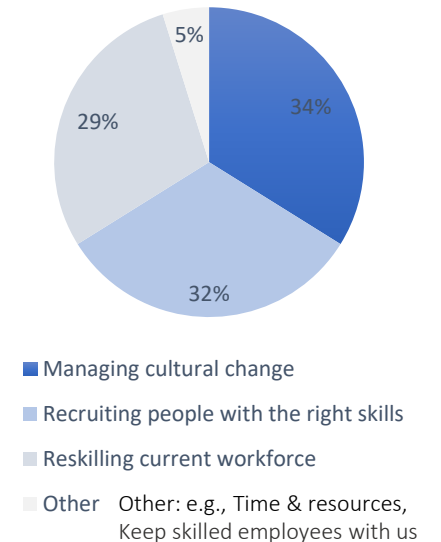
n = 39
Multiple answers were possible

What is the main barrier for driving digital transformation processes in your company?

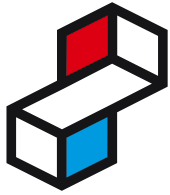


n = 39
Multiple answers were possible

What are in your view the main challenges with respect to skills/talents regarding the digital transformation of your company?



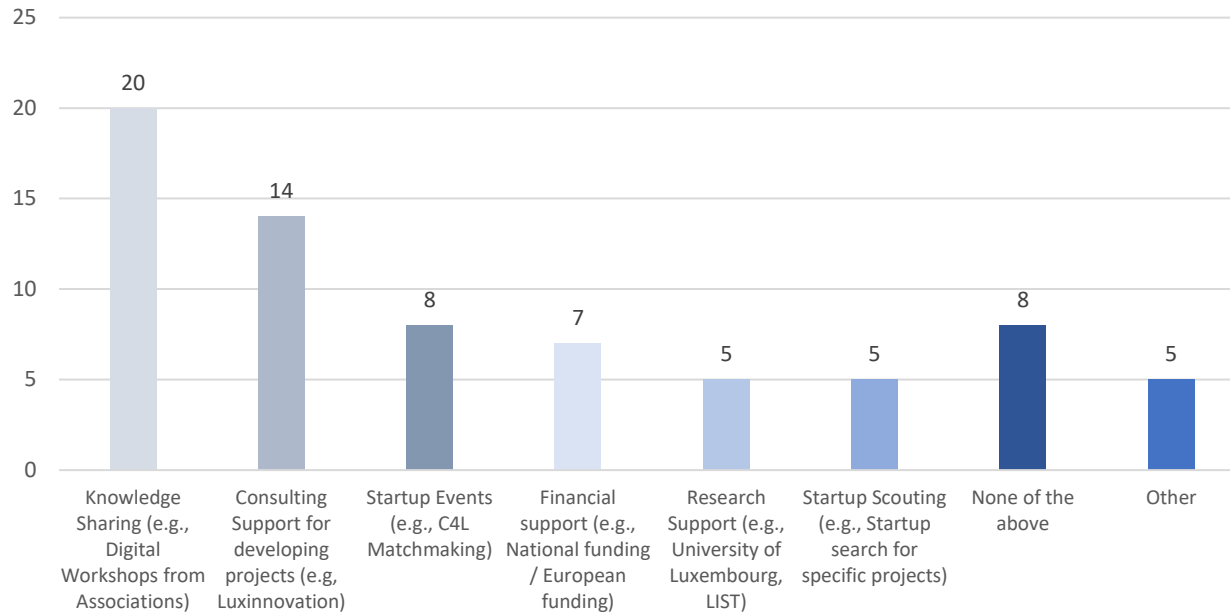
n = 39
Multiple answers were possible



2. Internal implementation of digitalization processes

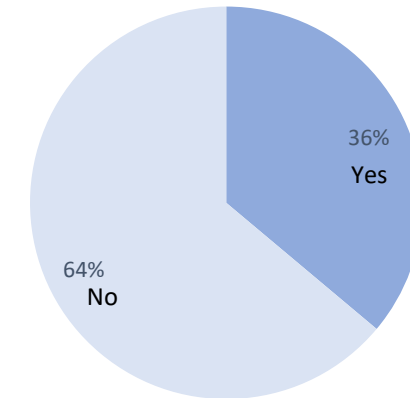
Support Initiatives | Percentage of Participation | Percentage of Participation

What kind of support would you need for moving forward in your digitalization efforts?



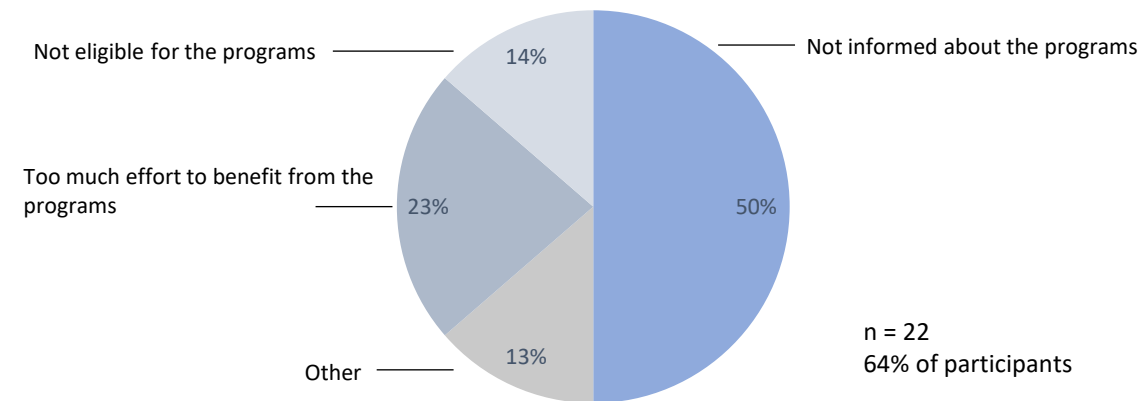
n = 39
Multiple answers were possible

Has your company already benefited from support initiatives offered in Luxembourg?

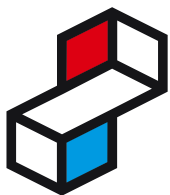


n = 36

If not, why has your company not benefited from such a support initiative(s) yet?



n = 22
64% of participants

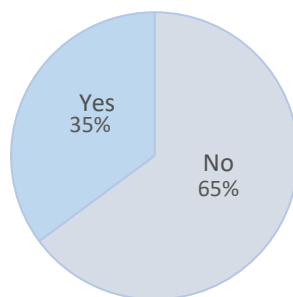


3. Handling and processing of data

Data Strategy | Sharing Data Key | Challenges of Data Collection

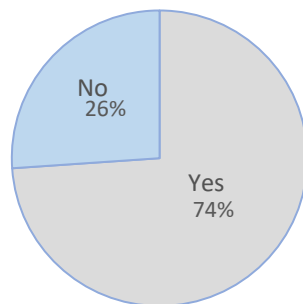
Does your company systematically collect and process data in order to evaluate and predict certain operational processes?

n = 37

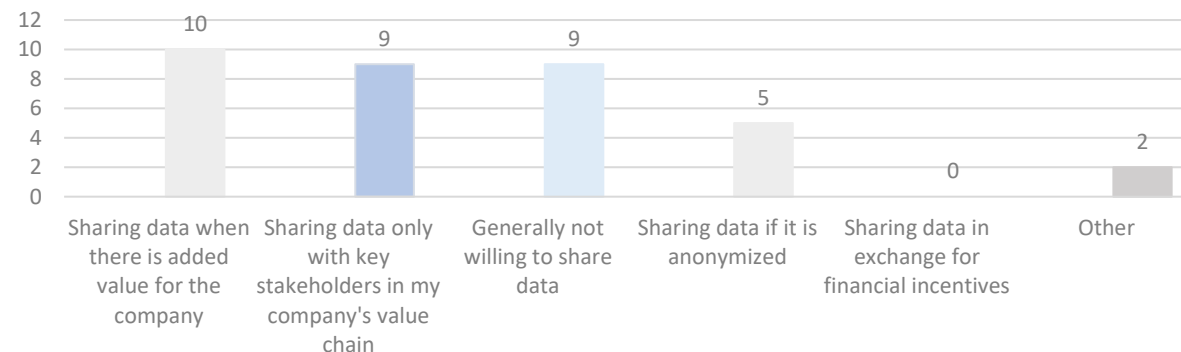


If so, has your company a defined data strategy to ensure the collection, use and governance of data?

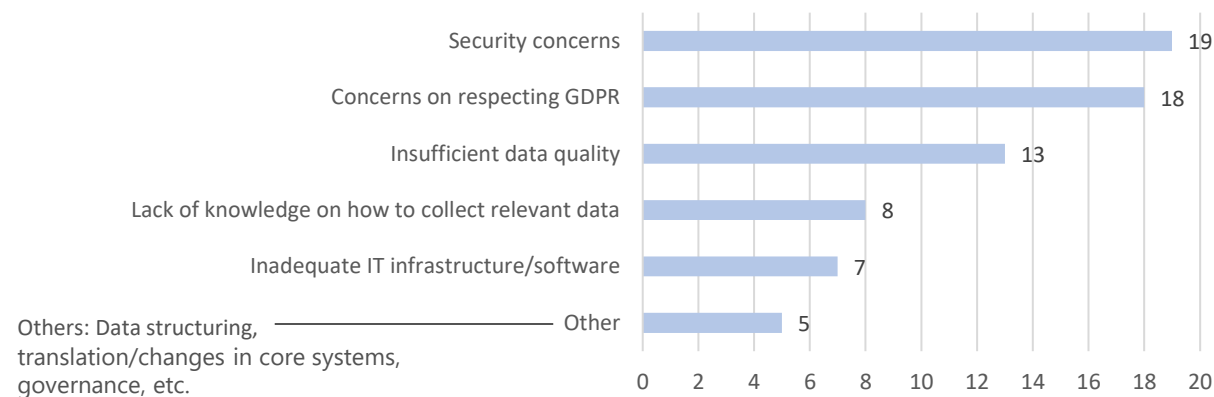
n = 23



How do you rate your company's willingness to share data?

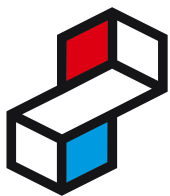


What do you see as the key challenges around data collection and processing?



n = 34

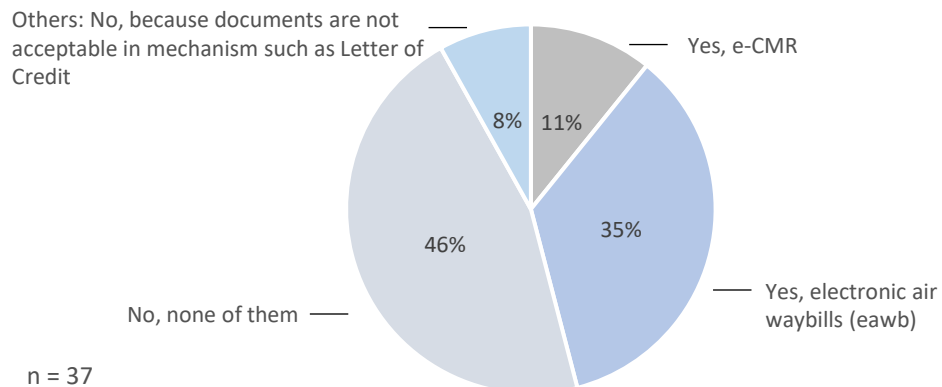
Multiple Answers were possible



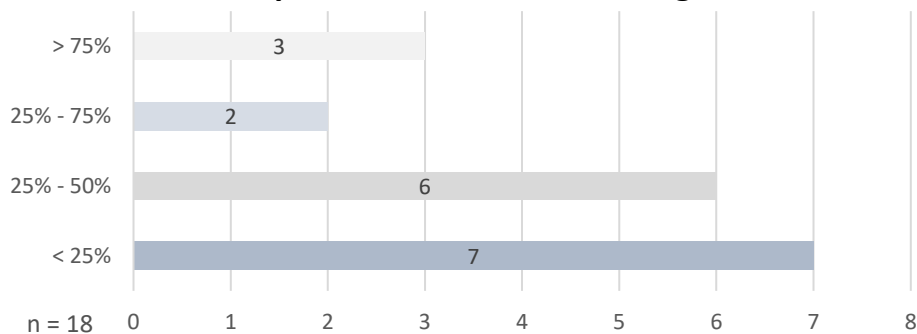
4. Excursus: Electronic delivery notes

Usage of Electronic delivery notes

Does your company already work regularly with electronic delivery notes?

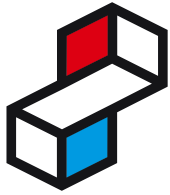


If so, how large is the share of electronic paperless freight documents compared to conventional freight documents?




If not, why are digital delivery notes not yet being used by your company?






5. Key Results & Actions from the Digital Transformation Survey

A = Action




91% actively drive digitalization projects

- 50%** have already implemented specific digitalization projects
- 27%** are planning the implementation
- 14%** are evaluating pilot projects



Main Use Cases

Operational Efficiency	Transportation Planning Processes (28) Digital Freight Documents (21) Warehouse operations (12)
Service Quality	Tracking & Tracing (27) Customer Service (17)



Main Technologies

AI	Advanced Analytics and Artificial Intelligence Solutions (21)
IoT	Internet of Things based Solutions (18)
None	Some companies seem to look at technologies they develop themselves (11)



Main barriers of driving digitalization projects

- 66%** Indicate having a lack of time or conflicting priorities
- 33%** Indicate having a lack of internal expertise
- 1%** Indicate having a lack of financial expertise



Action: Provide tailored support to our member companies regarding identified digitalization priorities to save the time of own research.



Action: Integration of digitalization expertise into school education DT Logistics, Bachelor in Logistics, etc.



Top priorities of support initiatives for C4L members

- 51%** Knowledge sharing organized by industry associations (e.g., Digital Workshops, Conferences, etc.)
- 36%** Consulting Support for developing digitalization projects (e.g., Luxinnovation)
- 21%** Startup Events (e.g., C4L Matchmaking Events)



Action: Organize digital workshops with experts on hot topics of digital transformation in logistics Knowledge sharing in our Podcast & Newsletter



Action: Maintain and extend startup matchmaking events to the needs of our members



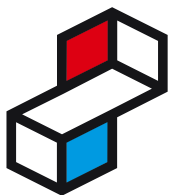
64% have not benefited from support initiatives

- 50%** have not been informed about existing initiatives
- 23%** too much effort to benefit from initiatives



Action: Develop joint information campaigns about support initiatives in the ecosystem MECO, Luxinnovation, C4L, etc.

CLUSTER FOR LOGISTICS



C4L Members and Partners

CHAMBER OF COMMERCE LUXEMBOURG
POWERING BUSINESS

CLC
commerce transport services

Cluster Maritime
Luxembourgeois

FEDIL
The Voice of Luxembourg's Industry

LUXEMBOURG INSTITUTE OF SCIENCE AND TECHNOLOGY | **LIST**

LUXINNOVATION
TRUSTED PARTNER FOR BUSINESS

UNIVERSITÉ DU LUXEMBOURG

ARTHUR WELTER

ASTRON

cargolux

CFL multimodal

lux airport

CHAMP

DB SCHENKER

Luxair CARGO

LUXPORT LORANG THESILUX
LUXPORT GROUP

Post LUXEMBOURG

SOURCIFY

TRANSALLIANCE

enovos

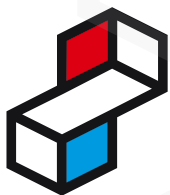
SINGLE WINDOW FOR LOGISTICS LUXEMBOURG

LE GOUVERNEMENT DU GRAND-DUCHÉ DE LUXEMBOURG
Ministère de l'Éducation nationale, de l'Enfance et de la Jeunesse

THE GOVERNMENT OF THE GRAND DUCHY OF LUXEMBOURG
Ministry of the Economy

LE GOUVERNEMENT DU GRAND-DUCHÉ DE LUXEMBOURG
Ministère de la Mobilité et des Travaux publics
Département de la mobilité et des transports

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