



ONBOARDING INTRODUCTION

Global Corporate Human Resources

01

COMPANY OVERVIEW



ICTSI Profile

About ICTSI



Born with a drive to provide positive and sustainable growth in ports worldwide

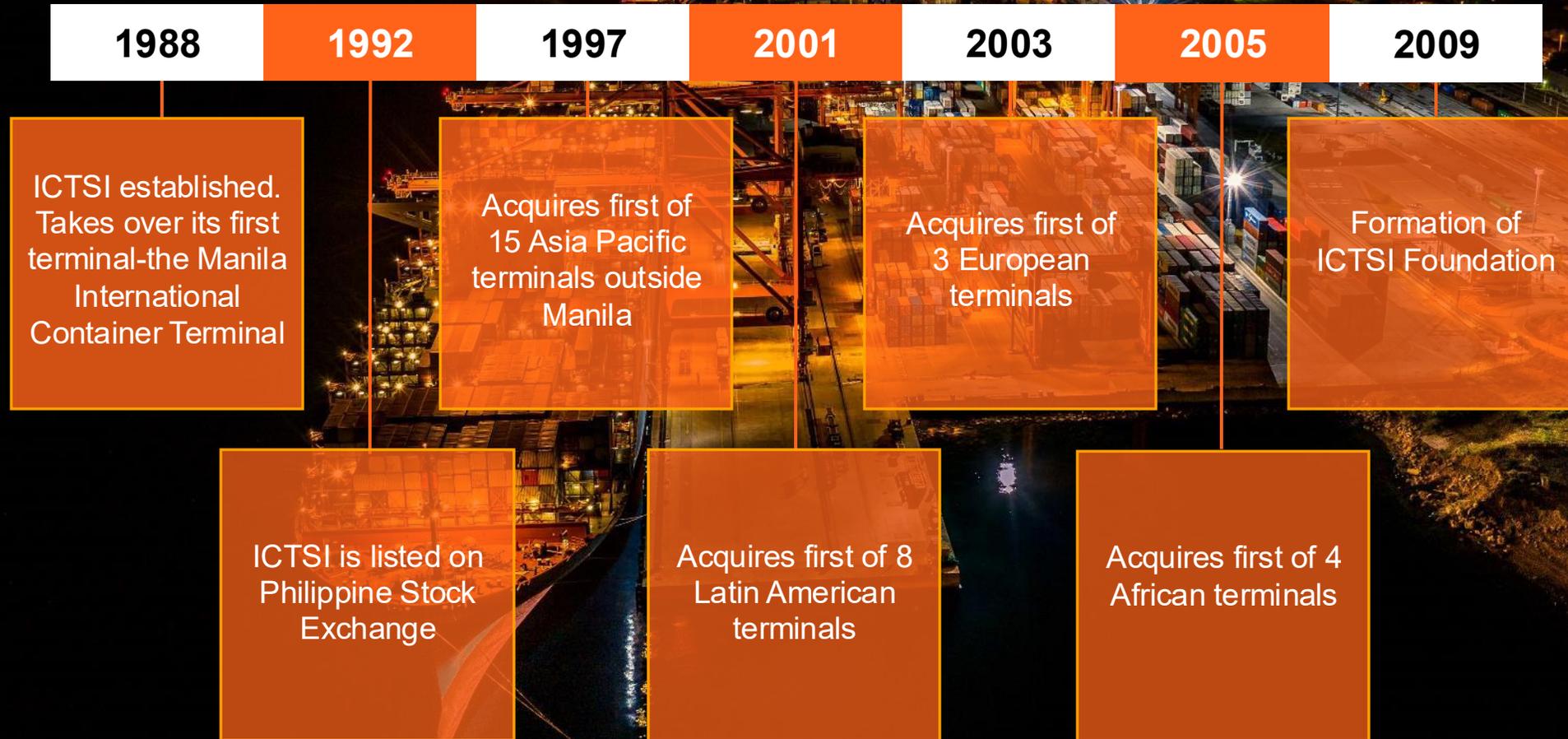
Founded in 1988 to operate the Manila International Container Terminal, we have grown from a one-terminal Philippine company to an industry-leading global port operator valued at over USD8.1 billion with 34 terminals in 20 countries.



Timeline



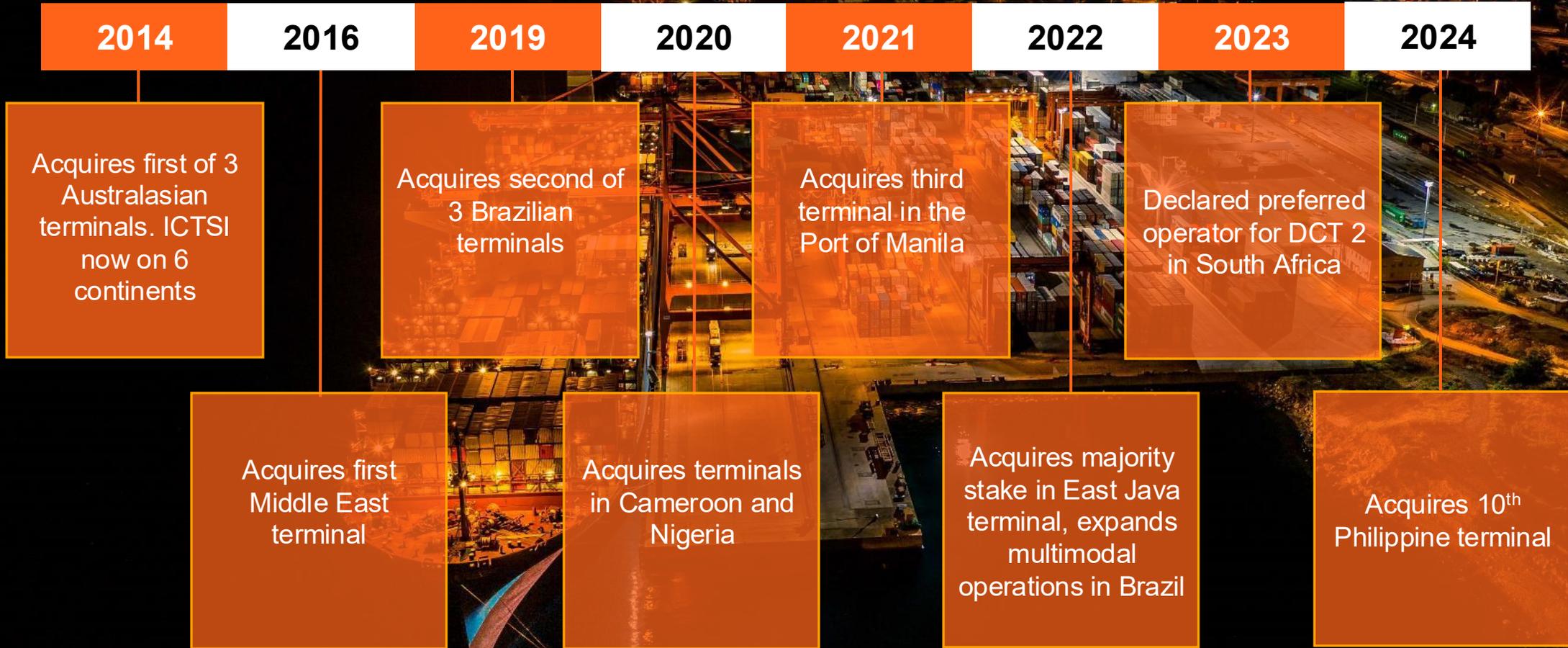
ICTSI was among the first terminal operators to roll out its expertise abroad, capitalising first on PPP opportunities and in more recent years also taking advantage of private acquisition opportunities, focusing on gateway terminals.



Timeline



ICTSI has grown over the years operating on a truly global basis and winning widespread acclaim as one of the world's leading international terminal operators.

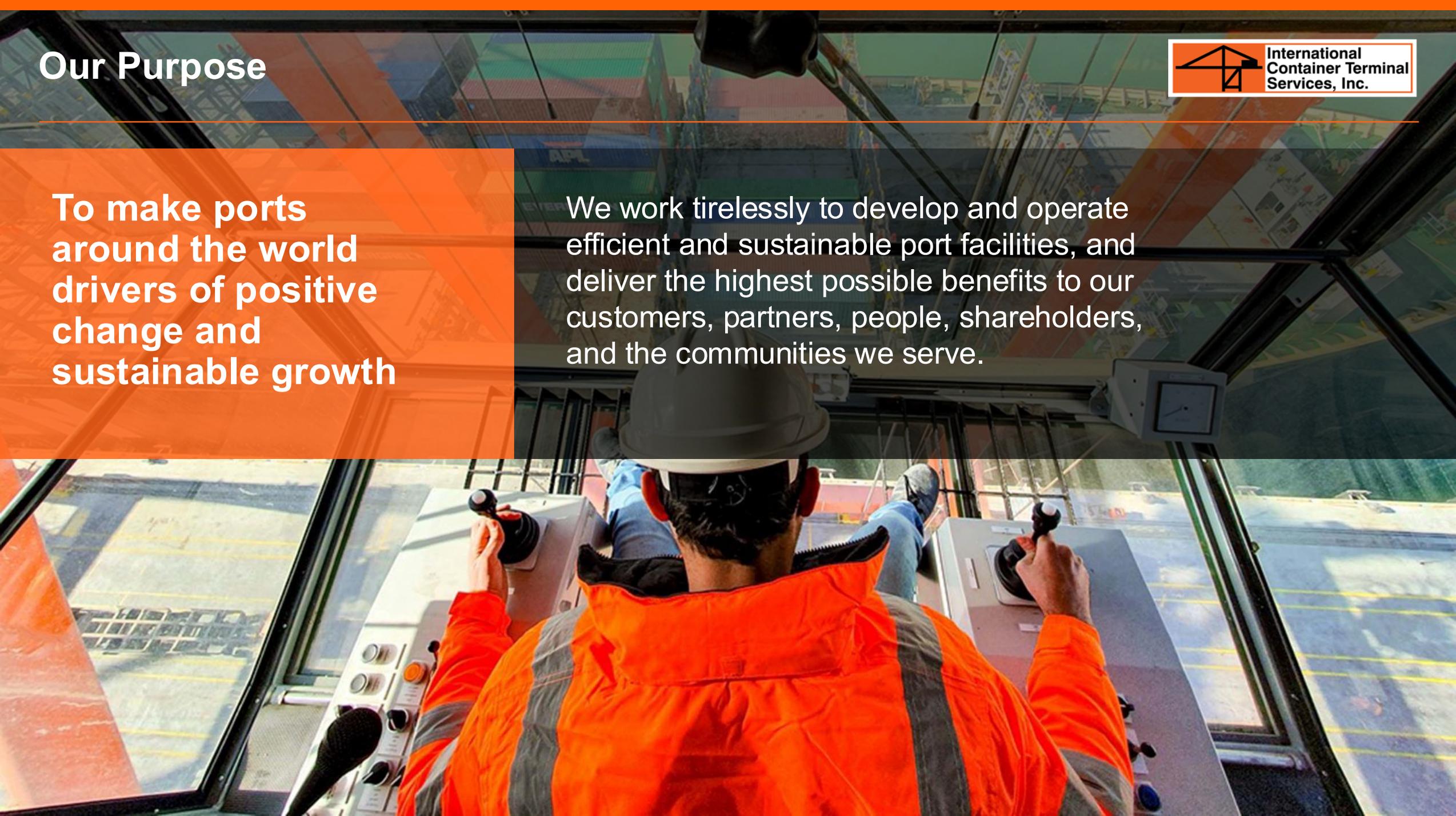


Our Purpose



**To make ports
around the world
drivers of positive
change and
sustainable growth**

We work tirelessly to develop and operate efficient and sustainable port facilities, and deliver the highest possible benefits to our customers, partners, people, shareholders, and the communities we serve.



Our Values



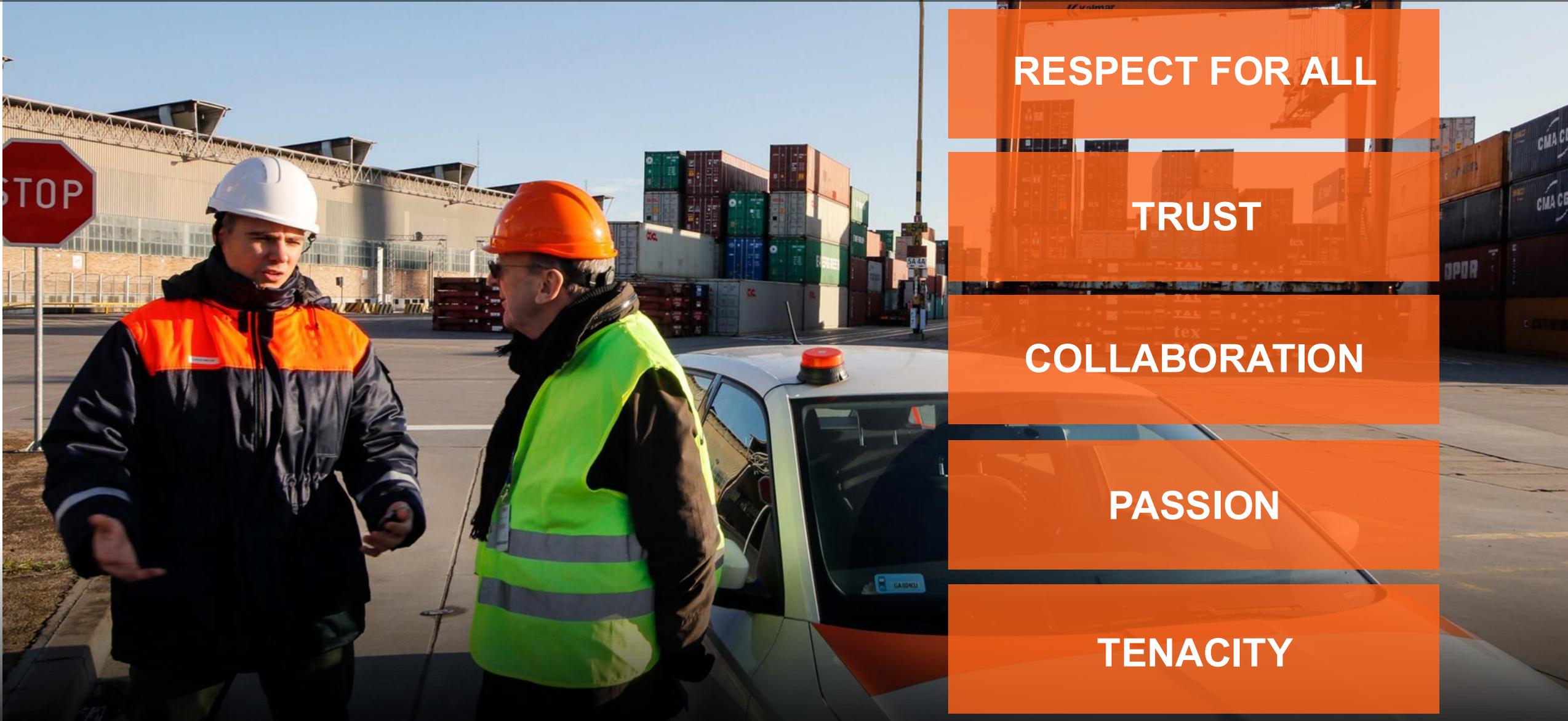
RESPECT FOR ALL

TRUST

COLLABORATION

PASSION

TENACITY



Our Values



RESPECT FOR ALL

We place the utmost importance on safety, community and diversity. The wellbeing and health of all our stakeholders is our number one priority. We strive to have the highest standards in place to ensure our people and stakeholders are safe, respected and treated fairly.



Our Values



TRUST

We lead with integrity, respect and compassion for our people, partners and communities, and our environment. We take great pride in working responsibly to earn trust and to keep it.



COLLABORATION

We are a diverse and inclusive company working together and exploring new ways of doing things to deliver the best possible outcome for all our stakeholders. As a responsible business, we embrace equality of opportunity and empower all our people to adapt, collaborate and innovate across borders.



Our Values



TENACITY

Our people work tirelessly with the utmost determination to achieve their goals and deliver on commitments to partners, stakeholders, host communities and the environment.



Our Values



PASSION

We are pioneers in an industry with deep linkages to the host economies and communities in which we operate. Our people relish the challenge of exploring new opportunities, operating terminals, creating sustainable benefits for our host communities and protecting the environment while also delivering returns to our stockholders.



**Socially responsible
in our involvement
with the economy,
environment,
government,
customers and the
vulnerable**

We are resolute in our commitment to develop and operate efficient and sustainable ports to create not only profitability but also social value and progress. We imbed sustainability, ethical and moral standards into all facets of our operations. Sound corporate governance, adherence to government regulations and industry standards, a code of conduct for and collaborative engagements with all stakeholders, inclusivity, practicable work solutions to protect the environment, health and occupational safety, and community involvement – all guide our day-to-day business. We commit to net zero GHG by 2050.

Our People



**Culturally diverse,
united by a common
goal**

We have a diverse 11,000 strong workforce across six continents – each individually unique and singularly qualified for the task – working together to uphold our values and purpose. We hire locally and have one of the lowest attrition rates in the industry. Across race, beliefs, disciplines, gender – we embrace diligence, compassion, accountability and teamwork to promote inclusive growth. Our global team is held together by an equally diverse leadership that promotes equal opportunities for personal growth and work.



Operational integrity and continuity through first-rate health, safety, security and environmental performance

We maintain growth and quality in an accountable manner by deliberately adhering to only the highest health, safety, security and environmental standards for our staff and stakeholders in all aspects of our operations. HSSE systems – communicated, understood, implemented and regularly reviewed – ingrained in everyone in the organization promote safety while minimizing the risk to our operations. These mechanisms allow us to establish a culture of proactivity and continuous improvement.



Corporate Philanthropy



Sensitive and responsive to the urgent needs of the marginalized and the environment

The ICTSI Foundation, the implementing unit for the philanthropic initiatives of the ICTSI Group, is driven by two pillars - youth development and environment protection. With programs catering to the youth of our host communities and hinterlands, the Foundation contributes to address gaps on education, health, sports and social development. Working on the premise of zero harm to the environment, we implement developmental and sustained programs to revitalize the environment.



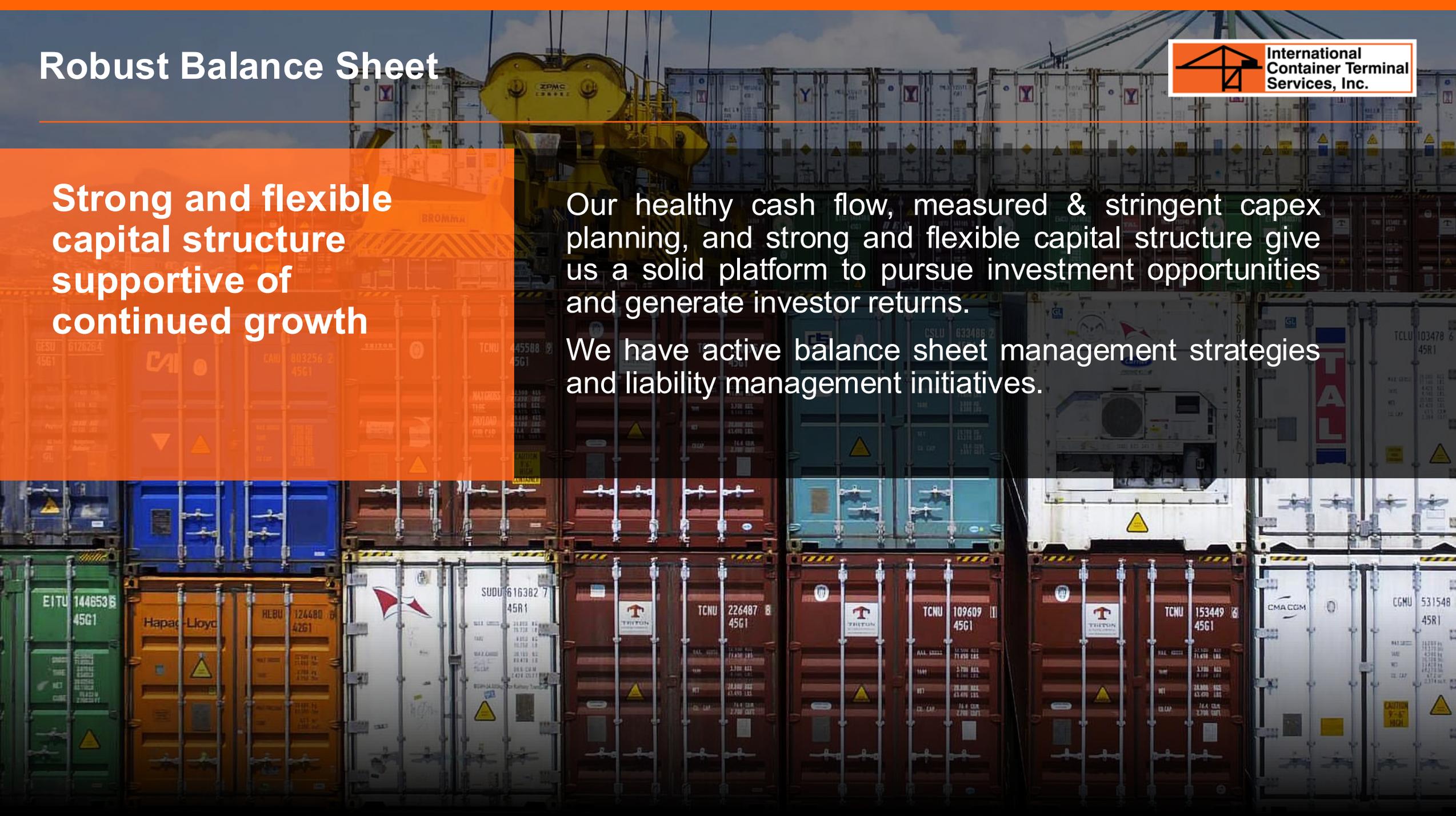
Robust Balance Sheet



Strong and flexible capital structure supportive of continued growth

Our healthy cash flow, measured & stringent capex planning, and strong and flexible capital structure give us a solid platform to pursue investment opportunities and generate investor returns.

We have active balance sheet management strategies and liability management initiatives.



Commercial Solutions



We create value to give our clients a competitive advantage

We serve the 12 largest global shipping lines across strategic and growth areas across six continents. Our individual gateway terminals serve many of these global carriers as well as many active regional lines. We constantly improve all our terminals to service clients efficiently.



Continuous Growth

Over the years, ICTSI has continuously strengthened its terminal portfolio through acquisition and development of new and greenfield terminals, expansion of current facilities and investments on additional terminal handling equipment.

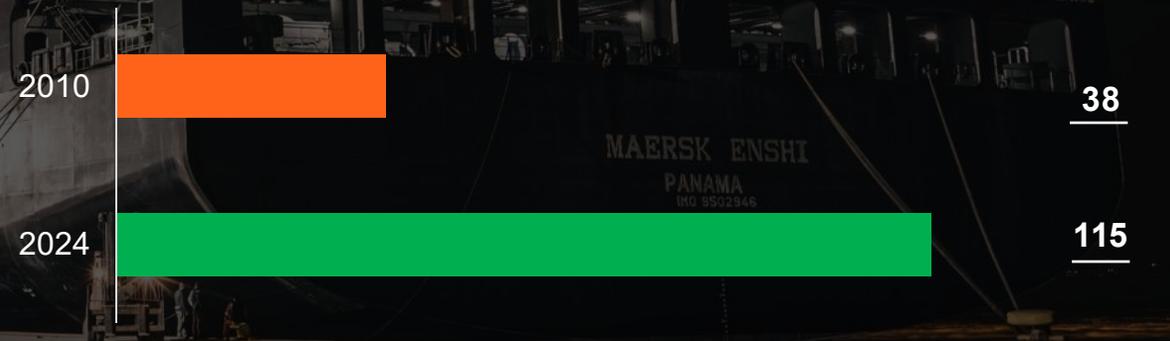
Group Volume
(in TEU)



Group Capacity
(in '000 TEU)



Group Cranage



Driving positive and sustainable growth in ports worldwide

We operate a container terminal portfolio across six continents including the world's most advanced automated terminal.

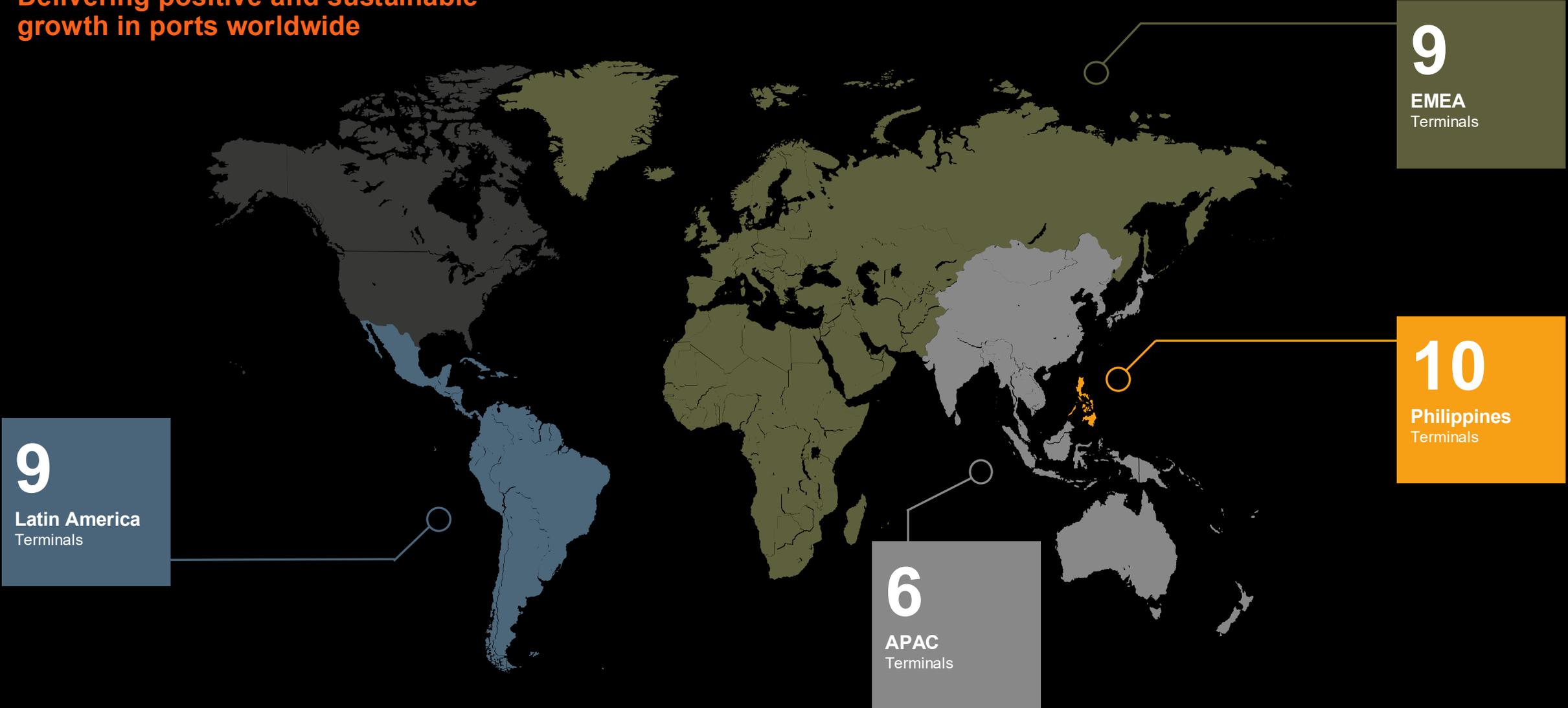
Our facilities feature a strong focus on small to medium throughput terminals in emerging markets where ICTSI is the unrivalled market leader, a provider of critical infrastructure where it is needed most, and a driver of sustainable economic growth.



The ICTSI Global Portfolio



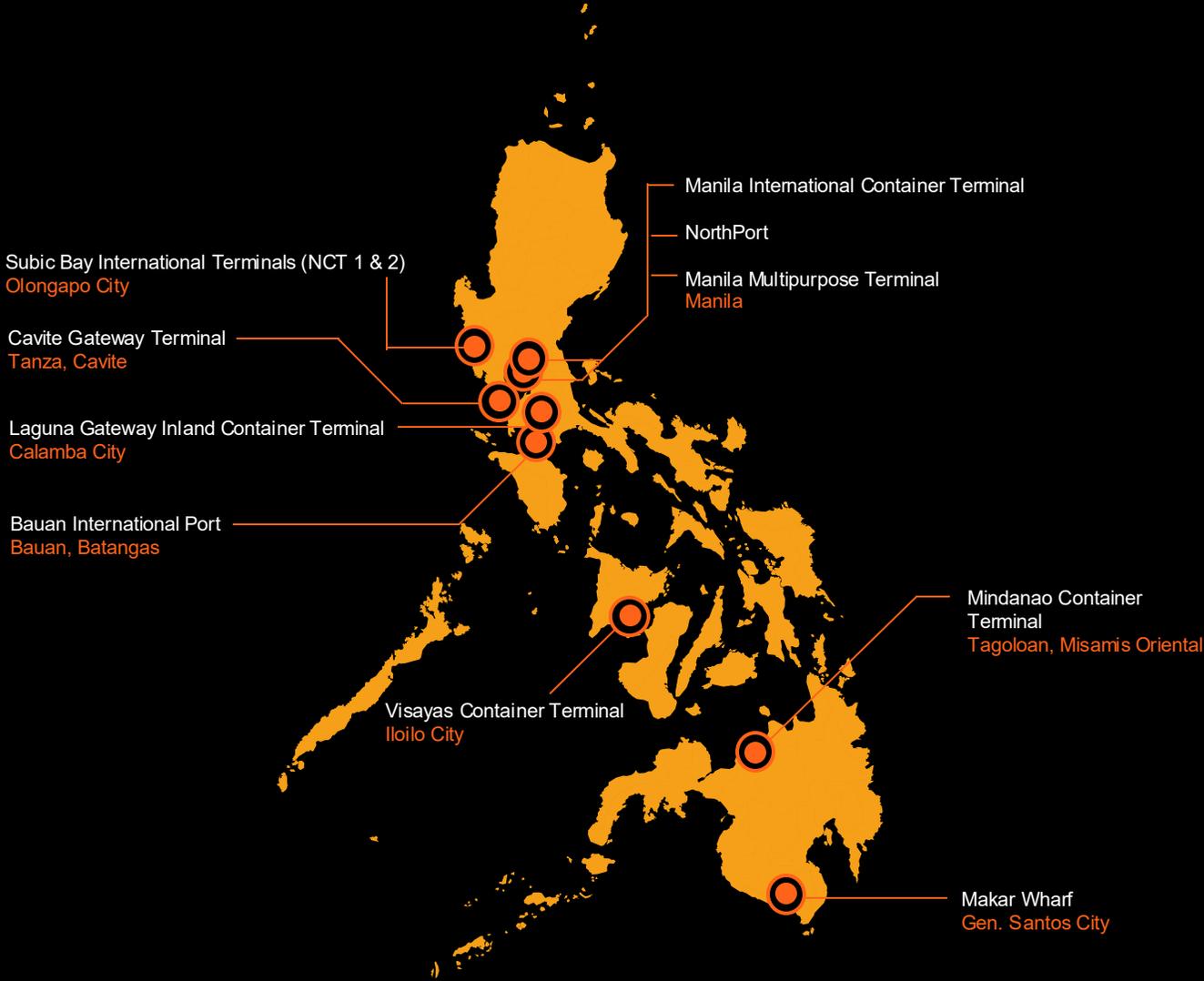
Delivering positive and sustainable growth in ports worldwide



Terminals in the Philippines



10
Philippines
Terminals



Terminals in APAC



6
APAC
Terminals

China
Yantai International Container Terminals
Shandong

Papua New Guinea
South Pacific International Container Terminal
Lae
Motukea International Terminal
Motukea

Indonesia
East Java Multipurpose Terminal
Lamongan
Batu Ampar Container Terminal
Batam

Australia
Victoria International Container Terminal
Melbourne

Terminals in Latin America



9
Latin America
Terminals

Terminals in EMEA



Poland

Baltic Container Terminal
Gdynia

Georgia

Batumi International Container Terminal
Adjara

Croatia

Adriatic Gate Container Terminal
Rijeka

Nigeria

Onne Multipurpose Terminal
Port Harcourt

Cameroon

Kribi Multipurpose Terminal
Kribi

D.R. Congo

Matadi Gateway Terminal
Kongo Central

Iraq

Basra Gateway Terminal
Umm Qasr

Madagascar

Madagascar International
Container Terminal
Toamasina

South Africa

Durban Gateway Terminal
KwaZulu-Natal

9

EMEA
Terminals



ICTSI Global Academy Framework for Successful Employees



**Technical
Competence**



**Knowledge of
Terminal
Fundamentals and
Management**



**Leadership
Capabilities**



**Safety
Mindset &
Practices**



**Customer
Service
Mindset &
Practices**

02

The Container Terminal

The Container Terminal

CONTAINER TERMINAL

Facility to facilitate the exchange of import and export containers to and from international ships and the domestic economy.



The Quay

QUAY

Planning and activities associated with the vessel and loading and unloading.



The Yard – The “Lungs” of the Terminal

YARD

Planning and activities associated with storing and loading and unloading containers to/from the vessels or outside trucks.



Why do we need a Container Yard?

Buffer

- Acts as a buffer for containers moving Ship-to-Ship (Transshipment) and Ship-to/from-End User (Import/Export)
- Import/Export operations (Discharging/Loading) cannot be dependent on third parties
- Terminal and End users have different working hours and different priorities

Storage of Containers

- Waiting for the "2nd Carrier"
- Waiting for Customs procedures to be completed
- Ability of importers to received goods into store in their working hours
- Management of empty containers

Operational Requirements

- Import Containers arrive quickly (discharged) but delivered slowly
- Export Containers arrive slowly but loaded to ships quickly

The Yard Operations

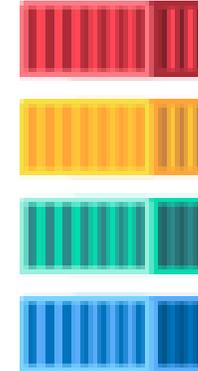
Container Profile

- Origin and Destination (O & D)
- Transshipment



Container Status

- Imports - Exports - Tranship
- Reefers – Imports and Exports
- Empty Containers
- Customs Inspection



Mode of Transport

- Road
- Rail
- Barge



Yard Function:

- Transport (Marine to Landside etc.)
- Storage Facility for Laden containers
- Storage Facility for MT containers (MT Pool)
- Facility for Pack – Unpack containers



The Gates

- The Gates provide the operational check point to ensure the legitimacy of all containers entering and existing the terminal.
- It is also the publicly visible image of the efficiency and effectiveness of the terminal.



Importance of the Gates

Gates - External Measure of Efficiency

Perceptions Created - First Point of Contact for Many Customers

- Queues of trucks at entrance
- Queues of truck drivers waiting to process paperwork
- Queues of trucks trying to leave
- Truck time arrival to departure measured in hours (even days in extreme cases)

**Efficiency
Rating by
Lines and
End Users**



03

Container Terminal: Types of Equipment

Types of Equipment

Quay Crane

- Dockside container crane used for loading (to vessel) and unloading (from vessel) intermodal containers
- Also known as ship-to-shore (STS) crane



Rubber Tired Gantry (RTG) Crane

- Container crane used to load and unload containers from yard to truck or mobile equipment



Types of Equipment

Terminal Tractor (Prime Mover)

- A kind of semi-tractor used to move containers within a cargo yard, warehouse facility, or intermodal facility



Empty Stacker (Side Lifter)

- A purpose built semi-trailer, on which a specially designed set of cranes are mounted to lift and transport empty containers



Types of Equipment

Forklift

- A powerful industrial truck used to lift and move materials (cartons, pallets, etc.) over short distances
- Mostly used during stripping, loading and unloading cargo from the container



Reach Stacker (Loaded Stacker)

- A purpose built semi-trailer, on which a specially designed set of cranes are mounted to lift and transport loaded container



04

Terminal Customers and Stakeholders

Terminal Customers

Shipping Lines (Carrier)

Entity who undertakes to perform, directly or indirectly, the carriage of cargo normally under a contract of carriage

Cargo Owners (Importers / Exporters)

An entity or organization who brings goods or services into a country from abroad (import) or out to another country (export) for sale

Customs Brokers

Entity or organization who is licensed/authorized to deal directly with Customs, for and behalf of another person/entity, relating to the importation, exportation, movement, and storage of goods

Trucking Partners

Entity/organization employed by the cargo owner or representative to transport the goods by truck

Terminal Stakeholders



Philippine Ports Authority – handles and controls the different ports in the Philippines



Bureau of Customs (BoC) – handles the collection of duties, taxes, and other customs payments of all Incoming and Outgoing cargo/containers



Philippine Coast Guard (PCG) – enforces laws within the Philippine waters, conducting maritime security operations, safeguarding life and property at sea, protecting marine environment and resources



Maritime Industry Authority (MARINA) – under the Department of Transportation, responsible for integrating the development, promotion, and regulation of the maritime industry



Department of Agriculture (DA) – responsible for promoting and regulating agricultural and fisheries development for growth. Under this department are the Bureau of Animal Industry (BAI), Bureau of Plant Industry (BPI), and Bureau of Fisheries and Aquatic Resources (BFAR)

05

Terminal Key Performance Indicators (KPIs)

Overview of Terminal KPIs



Key Performance Indicators

Help to understand how well the terminal is performing. Use of **GROSS** and **NET** outputs may need variation in calculation rules depending on the audience

Assist benchmarking against other terminals to determine performance compared to other terminals

Used to create trend lines over a period of time – is the KPI showing improvement, no change, or going backwards?

Vessel Performance

- Vessel Productivity
- Berth Productivity
- Crane Density

Equipment Productivity

- Quay Crane
- RTG
- PM

Truck Dwell Time

- Gate In to Last Execution
- Last Execution to Gate Out
- Gates Processing Time

Container Dwell Time

- Container Age
- Container Dwell Time

06

Terminal Systems and Technology

Terminal Systems and Technology

<p>Navis (N4) and Sparcs</p> 	<p>Software used for vessel and yard planning, administrative processes, data storage, and invoicing</p>
<p>ABB (GOS)</p> 	<p>Automated gate operating system used to manage and facilitate truck transactions and gate processes</p>
<p>1Stop (TABS)</p> 	<p>Vehicle booking system for trucks entering the terminal</p> <p>TABS - Terminal Appointment Booking System</p>
<p>IGO</p> 	<p>System that provides data and reports on container terminal productivity and operational efficiency</p>
<p>ACTS (Advanced Customer Transaction System)</p>	<p>System for customers to process transactions with the terminal</p>

Terminal Systems and Technology

teklogix



Microster



	Provide precise and reliable tracking and help in faster data transmission of wireless software and rugged mobile devices like netbook
NCOS	Port traffic management system that utilizes high performance, cloud-based environments to resolve vessel motions and forces
	System for manpower resource, manning and dispatch
	Power business solution tool for managing admin financials, HR admin, and



Thank you.