

2017 FALL MEMBER FORUM

FORCES OF CHANGE: New Directions in Transportation

NOVEMBER 6 & 7, 2017

The 2017 Fall Member Forum features leading experts on a number of longer-term global issues that are proving to be a force of change in our industry.

Each force has the potential to impact how we think about the future of our organizations and how we execute plans as executives, policymakers and labour leaders. Speakers will examine how technological, economic, political and social issues are influencing and changing the business of freight transportation.

Identified 'forces of change' topics include:

1. **Shipping industry transformations:** at sea and onshore
2. **China's One Belt One Road:** will it reshape global trade?
3. **Future of work:** automation, technology and social policy
4. **Business beyond the market:** a social and political agenda

The limited number of speakers and topics will allow for more in-depth exploration and roundtable discussions of the impacts on global, national and regional markets as well as on the local communities in which WESTAC members operate.

WESTAC Leaders Council takes place November 7. This portion of the event is limited to the senior-most participant from each member organization. Please ensure you have representation at this conversation.

FORWARD THINKING. TRANSPORTATION.





VENUE

Sheraton Suites Calgary Eau Claire

255 Barclay Parade SW Tel: 403.266.7200
Calgary, AB

Meeting Rooms

Meeting Rooms – all meetings and meals take place in the Wildrose ballroom on the mezzanine level.

SCHEDULE

Monday, November 6, 2017

8:30 am	Hot Buffet Breakfast
9:15 am	Welcoming Remarks
9:45 am	Working Sessions begin
10:45 am	Break
11:15 am	Working Sessions cont.
12:15 pm	Lunch with Presentation
2:00 pm	Working Sessions cont.
3:30 pm	Break
4:00 pm	Working Sessions cont.
5:15 pm	Working Sessions end
5:30 pm	Reception

Tuesday, November 7, 2017

8:00 am	Buffet Breakfast
8:30 am	WESTAC Leaders Council*
10:30 am	Board of Directors Meeting
12:00 pm	Lunch for Directors

* Open to **ONE** senior-most participant from each member organization.

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Monday, November 6, 2017

8:30 am **Buffet Breakfast**

9:15 am **Welcoming Remarks and Introductions**

Hon. David Marit, Minister of Highways and Infrastructure, Government of Saskatchewan and Chair, WESTAC

Oksana Exell, President and CEO, WESTAC

9:45 am **SHIPPING INDUSTRY TRANSFORMATIONS: AT SEA AND ONSHORE**

“The recent wave of carrier consolidation will continue into 2018 and its effect on the supply side of the market will be felt ever more strongly for several years to come. At the same time, demand is expected to continue growing at a healthy pace. That is why... in tomorrow’s market the balance of power between shippers and carriers may shift.”

– Stijn Rubens, *Drewry Reefer Club Combats Freight Rate Uncertainty*, PortTechnology.org

The maritime industry has undergone significant change over the past five years. This session will explore the cause of some of these changes, the current state of the industry and impacts on the supply chain, gateways and shore-based stakeholders worldwide and in Western Canada.

Stijn Rubens, Senior Advisor, Drewry Supply Chain Advisors

Roundtable discussion

Monday, November 6, 2017

10:45 am **Break**

11:15 am **ONE BELT ONE ROAD: WILL IT RESHAPE GLOBAL TRADE?**

“I think the Chinese have realized they’re the major beneficiary of globalization. If the U.S. ducks out, China will take over the leadership role in globalization. People don’t seem to realize how important [OBOR] is, a (freight) train is already running between London and China!”

– Pieter Botellier, *China Eyes Global Economic Leadership as U.S. Turns Inward*, USA Today

In 2013, China announced One Belt, One Road (OBOR), an infrastructure initiative that is the modern version of the ancient East-West trade route between China and Europe. Launched with \$40 billion of initial investment, it entails construction of new or reinvigorated railways, ports and roads that will link key cities as well as hundreds of projects designed to enhance capacity within the OBOR area. This session will shed light on the geopolitical, economic and operational impacts of this ambitious initiative.

Pieter Botellier, former Chief of World Bank office in Beijing and former Professor, China Studies at Johns Hopkins School of Advanced International Studies

Roundtable discussion

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Monday, November 6, 2017

12:15 pm

Lunch with Presentation

THE CANADIAN INFRASTRUCTURE CHALLENGE

“The country needs more infrastructure, but we’re not having the right conversations. We’re too focused on individual projects or various pain points. We need to take a step back and say, ‘What do we need to do to really move the needle?’”

– Keith Halliday, Director of the BCG Centre for Canada’s Future

Canada is a nation built on transformative, nation-building infrastructure projects. Many believe we have lost our way by no longer appreciating the true value of these projects to our sense of national pride, our economy and our ingenuity. The Boston Consulting Group is leading the charge to build excitement around the tremendous opportunity transformative national infrastructure represents within Canada. The goal is to provide a platform to get Canadians thinking about, discussing and ultimately supporting infrastructure. Today’s session will outline the initiative and will bring together a panel to talk about nation-building infrastructure – past, present and future.

Warrick Lanagan, Partner & Managing Director (Toronto), The Boston Consulting Group

Darwin Smith, Partner & Managing Director (Calgary), The Boston Consulting Group

MEMBER PANEL

Jean-Jacques Ruest, Executive Vice President & Chief Marketing Officer, CN

Hon. Wally Schumann, Minister of Industry, Tourism and Investment & Minister of Infrastructure, Government of the Northwest Territories

Robin Silvester, President & CEO, Port of Vancouver

Monday, November 6, 2017

2:00 pm

FUTURE OF WORK: AUTOMATION, TECHNOLOGY AND SOCIAL POLICY

“Potentially unlimited output can be achieved by systems of machines which will require little cooperation from human beings. The result would be massive unemployment, soaring inequality, and, ultimately, falling demand for goods and services as consumers increasingly lacked the purchasing power necessary to continue driving economic growth.”

– Martin Ford, *Rise of the Robots: Technology and the Threat of a Jobless Future*

Martin Ford explores the ways in which rapid developments in AI and automation (aka, “robots”) are replacing humans in a growing range of sectors, from education to law, agriculture to healthcare, management and beyond. He offers a realistic view of what the future of work – and your place in it – will look like.

Beyond pragmatic concerns, Ford addresses the bigger issue of whether accelerating technology will disrupt our entire economic system to the point where a fundamental restructuring is required? This exciting talk is both an exploration of new technology and a challenge to address its implications and the role of companies and governments in ensuring a smooth transition for displaced workers.

Martin Ford, Futurist, New York Times Bestselling Author, Keynote Speaker and Silicon Valley Entrepreneur

Roundtable discussion

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Monday, November 6, 2017

3:30 pm **Break**

4:00 pm **BUSINESS BEYOND THE MARKET: A SOCIAL AND POLITICAL AGENDA**

“Markets do not exist in a vacuum; they are surrounded by social, political and cultural spheres. What happens within this nonmarket environment inevitably shapes dynamics within markets. What exactly is this nonmarket environment of business?”

– David Bach, *What Every CEO Needs to Know About Nonmarket Strategy*, MIT Sloan Management Review

Finding solutions to challenges is what business leaders do every day, yet corporations have traditionally left government to address social and political issues outside of the marketplace. Over the past decade, however, concerns about global economic inequality and the ineffectiveness of globalization and capitalism have become key drivers behind the polarization of public opinion and political uncertainty.

Consequently, today’s consumers, workers and citizens trust government less while expecting more out of corporations and institutions. As detailed in this presentation, some believe that corporate leaders can no longer afford to be observers and must step up to address some of the problems and help shape a more prosperous future for all. This new strategic perspective may be challenging but those who “refuse to get political” risk losing market share.

David Bach, Deputy Dean & Professor in the Practice of Management, Yale School of Management

Roundtable discussion

5:15 pm **Working Sessions End**

5:30 pm **Reception**

6:30 pm **Reception Ends**

Tuesday, November 7, 2017

8:00 am **Buffet Breakfast (open to all participants)**

WESTAC LEADERS COUNCIL – CONTINUING THE CONVERSATION

8:30 am Each forum concludes with an **in-camera**, frank discussion among the most senior representatives of member organizations. Participation is limited to **one person** per member organization and excludes external speakers and non-members. No reporting will take place.

THE LONG VIEW – The Future of Transportation in Canada

– a discussion with **Mike Keenan, Deputy Minister, Transport Canada.**

Building on what was heard about transformative infrastructure and potential forces changing how we operate, this Leaders Council will tackle a big question: **What is the next iteration of nation-building infrastructure and where should we focus our limited resources in this vast region?**

Members are asked to think about the competitiveness of the current western system and what is needed for the next phase of an integrated infrastructure and supply chain strategy.

10:15 am Meeting adjourns

10:30 am **Board of Directors Meeting**

12:00 pm **Lunch for Directors**

GUEST SPEAKERS



STIJN RUBENS

Senior Advisor

Drewry Supply Chain Advisors

Stijn joined Drewry in 2014 with 15 years' experience in shipping and logistics, ranging from advisory projects, break-bulk and chartering as a third party agent to controlling the European inland operations for a major container line.

At Drewry, Stijn has looked after and expanded the scope of some of the spot freight rate research products and contributed to several projects through both desk based research as well as field trips in Europe, the Middle East and Africa.

He is a regular speaker at international conferences and brings distinctive insight into freight rate trends, inland supply chain processes, hinterland strategies and multimodal transport solutions.

Stijn holds an M. Sc. in Transport Economics and an executive MBA in general management from the University of Antwerp Management School.



PIETER BOTTELIER

Former Chief of World Bank office in Beijing and former Professor, China Studies at Johns Hopkins School of Advanced International Studies

Pieter Bottelier, an economist and China scholar, is the author of many articles and book chapters on China's economy. He is a visiting scholar at Johns Hopkins University School of Advanced International Studies, where he served as senior adjunct professor. He also served as a senior adviser on China to The Conference Board; and visiting scholar at the Carnegie Endowment for International Peace since 2009. He also served as adjunct lecturer at Harvard University and Georgetown University.

Bottelier spent nearly 30 years at the World Bank, as senior adviser to the vice president for East Asia; chief of the World Bank's Resident Mission in Beijing; consecutive directorships for Latin America and North Africa; division chief for Mexico; resident chief economist in Jakarta, Indonesia; and handling various assignments as desk economist for East and West African countries.

Prior to the World Bank, Bottelier was employed as chief economist and marketing director of the (then) Zambian state-owned copper company (Lusaka); consultant to UNCTAD (Geneva) on the global market for virgin and scrap nonferrous metals; adviser, Ministry of Finance, Zambia (Lusaka); and at Amsterdam University.

Bottelier attended the University of Amsterdam, from which he received a Drs. degree (M.A. equivalent). He was also a guest scholar at MIT.

His new book *Economic Policy-Making in China, 1949-2016. The Role of Economists* will be released in 2018.



WARRICK LANAGAN

Partner & Managing Director (Toronto)

The Boston Consulting Group

Warrick Lanagan is a core member of The Boston Consulting Group's Industrial Goods and Operations practices. Since joining BCG in 2008, Warrick has worked extensively with clients in mining and metals, as well as in engineering, procurement, construction, and construction management. He has acquired extensive experience in large-capital projects, has led end-to-end project optimization programs, and designed and implemented major-project management approaches.

Warrick is also a core member of BCG's Centre for Canada's Future, which works to move Canada forward by providing insight and expertise on issues key to Canada's growth, and by calling on leaders from business, government, and nonprofits to work together to achieve impact.

Warrick's consulting experience includes supporting the development of a \$12 billion greenfield mining project in Canada, supporting the development of a \$15 billion port and rail development in Australia, and leading an operational improvement program for the Australian division of a global aluminum producer. He has also worked on numerous cost-reduction programs, capital estimate reviews, and feasibility studies.

EDUCATION

MBA, Finance and Private Equity, London Business School

Bachelor of Science degree, Curtin University



DARWIN SMITH

Partner & Managing Director (Calgary)

The Boston Consulting Group

Darwin Smith is a Partner in BCG's Calgary Office. He has been involved with all aspects of growing its presence in Western Canada, and is a core member of BCG's Center for Canada's Future which is the driving force behind the CanInfra Challenge. He works primarily with clients in BCG's energy practice – spanning utilities through to oil and gas companies. His functional focus is around corporate development, strategy, and transformative change.

Prior to BCG, Darwin worked in the upstream oil and gas industry. He held positions of increasing responsibility in Yemen, Canada, and the United Kingdom, where his most recent role saw him supervising an offshore drilling rig off the coast of Scotland.

Darwin holds a Bachelor of Science degree in Mechanical Engineering (with Distinction) from the University of Calgary and a Master of Business Administration degree (with distinction) from the Richard Ivey School of Business at the University of Western Ontario where he was first in his class.

GUEST SPEAKERS



MARTIN FORD

Futurist, New York Times Bestselling Author, Keynote Speaker and Silicon Valley Entrepreneur

Martin Ford is the founder of a Silicon Valley-based software development firm and the author of two books: New York Times bestselling *Rise of the Robots: Technology and the Threat of a Jobless Future* and *The Lights in the Tunnel: Automation, Accelerating Technology and the Economy of the Future*. *Rise of the Robots* received the Financial Times/McKinsey Business Book of the Year Award and was named one of Business Insider's Best Business Books of the Year.

He has over 25 years of experience in computer design and software development, and holds a computer engineering degree from the University of Michigan, Ann Arbor and a graduate business degree from UCLA. He has written for publications including *Fortune*, *Forbes*, *The Atlantic*, *The Washington Post*, *Project Syndicate*, *The Huffington Post* and *The Fiscal Times*. He has also appeared on numerous radio and television shows, including programs on NPR and CNBC, appeared at this year's TED 2017 conference.



DAVID BACH

Deputy Dean & Professor in the Practice of Management

Yale School of Management

David Bach is Deputy Dean & Professor in the Practice of Management at the Yale School of Management. An expert in political economy, his research and teaching focus on business-government relations, nonmarket strategy, and global market regulation. At Yale SOM, he teaches a core MBA course on State & Society as well as an elective course on Nonmarket Strategy.

As a member of Yale SOM's senior leadership team, Dean Bach directs the school's Executive MBA and the newly established Master in Advanced Management; spearheads engagement with the 29-school strong Global Network for Advanced Management; catalyzes curricular innovation in the area of global business; guides online education initiatives; and oversees Yale Center Beijing.

A winner of multiple teaching awards, Bach was named one of "40 under 40" business school professors by Poets & Quants, one of the "Top 50 business school professors on twitter".

Bach is frequently quoted on topics including the international economy, financial markets, business-government relations, and innovation in management education in outlets such as the *Financial Times*, *The Economist*, *New York Times*, *L.A. Times*, *BBC*, *Reuters*, *Times of India*, and *South China Morning Post*.

A native of Germany, he received his PhD and MA in Political Science from the University of California, Berkeley, and holds a BA magna cum laude in Political Science and International Studies from Yale University.

PARTICIPANTS

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2017 FALL MEMBER FORUM PRESENTATIONS

Instructions for accessing presentations and meeting materials online will be emailed by November 20, 2017.

EVENT CALENDAR

WESTAC SPRING MEMBER FORUM

May 3 & 4, 2018

Fairmont Winnipeg

Winnipeg, MB

NOTES