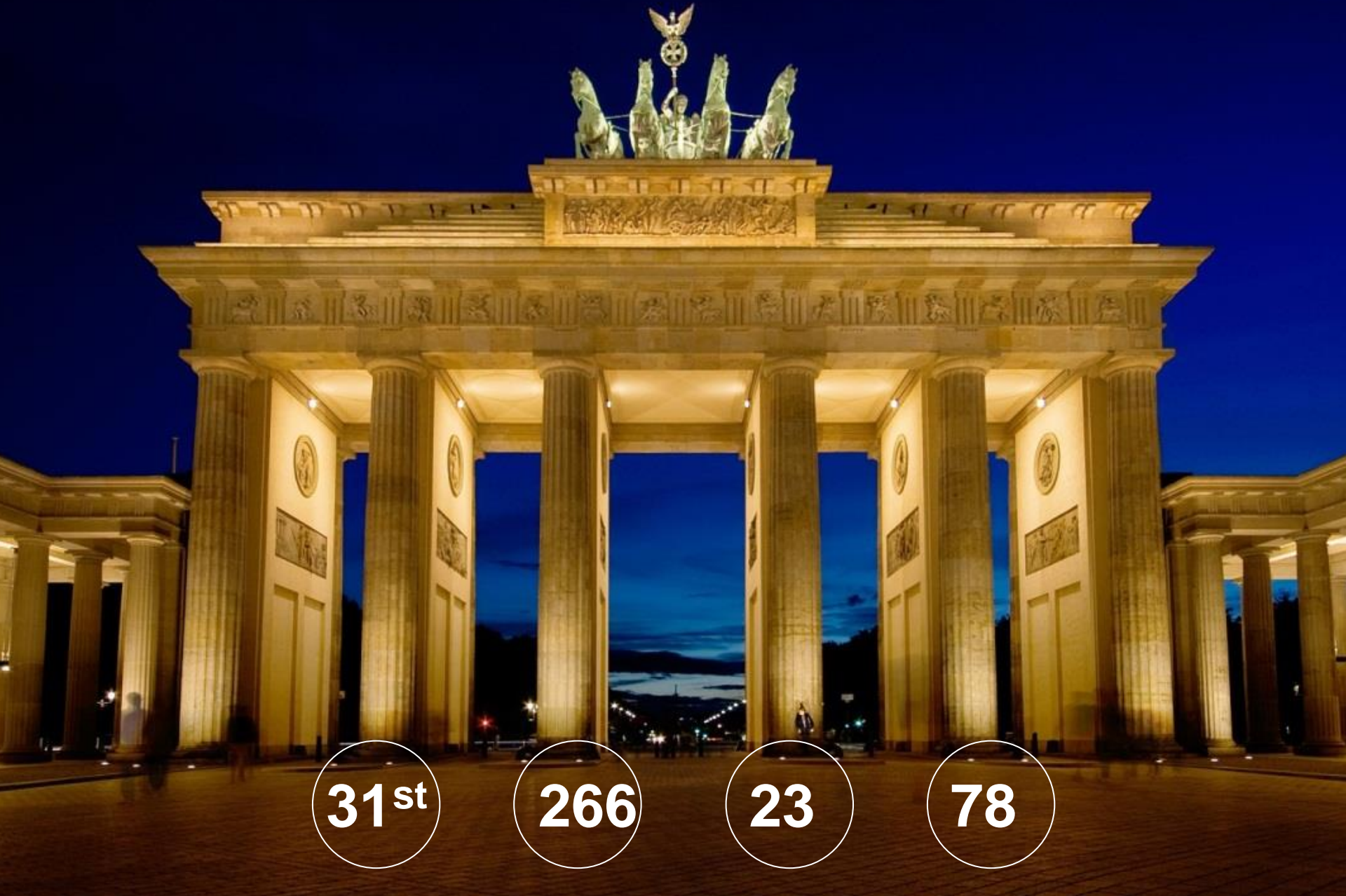


## ESTA Business Conference 2015



# Welcome to Berlin



31<sup>st</sup>

266

23

78

## Berlin a dramatic history

- Classic historic ground – a symbol of the entire Europe
- The division of Europe  
“Checkpoint Charlie” a block away
- The way back to unification – a symbol of hope
- First time for ESTA in Germany



*The Noble Price winner Willy Brandt, former Mayor of Berlin, quote "Friedliche Koexistenz", is a good statement for an industry evolving to create value*

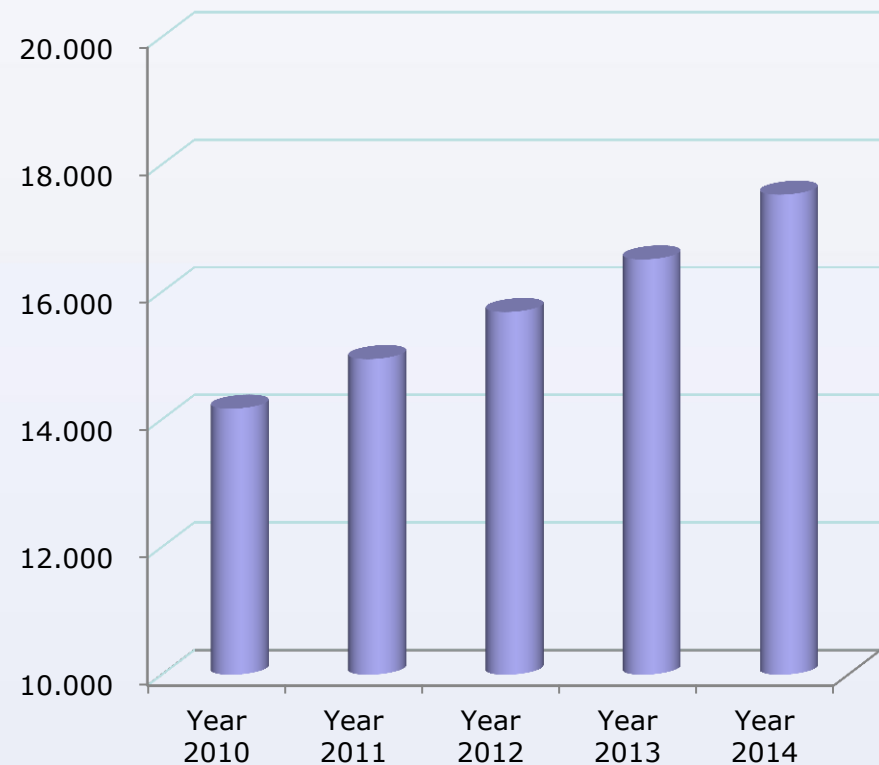
## Theme 2015: Change

- A typical post crisis – the need and willingness to change
- The Cash Management Companies need to constantly adapt to new conditions and circumstances
- We will listen to various case studies in how to create value – customers and suppliers



## General trends

- With some exceptions, the level of cash in total, is still stable or even increasing in Europe
- Cash handling is still rather labor intensive, and there is a clear evolution towards more automatization and recycling
- As a consequence of the reduction in number of bank branches, the cash flow and distributions channels through Retailers tends to increase



Euro banknotes – Outstanding  
5% year on year growth



## Continuous development

- Services and business solutions offered within our Industry are becoming more diverse and professional
- Security levels have improved as the Industry as a whole have improved
- New business opportunities and growth particular in the retail business
- General trend – **from CIT to CMS**



## Continuous challenge

- Security levels, requirements and regulations still varies quite a lot within Europe
- A more common industrial standardization towards specific licensing would both increase security and efficiency - cross border
- Industrial development in the direction of Payment Service Provider (PSP) is more likely to become a natural development for ESTAs members



## ESTA's Vision keywords

### **Safety (or Risk)**

- Continuously improved safety in the cash cycle
- Publish risk analysis to include banks, ATMs and retail
- Share good practices and suggest improvement
- Liaise with LEAs

### **Availability and Efficiency**

- Sustaining access to cash for all in Europe & social inclusion
- Coordination within the industry's stakeholders for cash relevant issues
- Point of call for technical issues
- Continuously optimize the cash cycle; share best practice and define best-in-class standards

### **Recognized Industry Voice**

- ESTA must be the "go-to-body" on European cash cycle matters
- In a competitive environment like ours, having a trusted and recognizable voice like ESTA's is critical
- We restore the truth and provide essential facts and data on cash



## ESTA directors

### Executive committee:

- **Jarl Dahlfors**, CEO Loomis
- **Thierry Lebeaux**, Secretary General
- **Luis Oro**, Director CIT Prosegur
- **Carlo Weisen**, SVP EMEA Brinks
- **Róbert Juhos**, Regional MD  
Central/Northern Europe

### Other directors:

- **Paolo Spollon**, CEO Battistolli
- **Peter Wesenberg**, EVP Cash Handling NOKAS
- **Patrick Lagarde**, President & CEO France Brinks
- **Steve Gilberg**, Director, Strategic Development  
& SafePoint Europe
- **Kenneth Hogman**, Regional President N EU,  
Loomis
- **Gonzaga Higuero**, MD Cash Worldwide (excl  
South America), Prosegur
- **Colin Woodland**, COO Europe Region  
(Cash Solutions), G4S

### Absent board members:

- Gert Askes**, CEO Netherlands G4S  
**Georges Lopez**, Reg President S EU Loomis

## Thank you to our Sponsors



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Geld- und Wertdienste



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# Thank You To Our Exhibitors



Thank you and welcome to  
ESTA Business Conference 2015!

## Introduction of Next Speaker

**Mr. Michael Mewes**

Chair of BDGW