LOGISTICS FOR EUROPE

SUMMARY

CLECAT ESC

SECURING GLOBAL SUPPLY CHAINS: FROM RISK AWARENESS TO RESILIENCE

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The fourth edition of *Logistics for Europe*, co-organised by CLECAT and the European Shippers' Council (ESC), gathered freight forwarders, shippers and other stakeholders of Europe's logistics community at a moment when supply chains are again at the center of political and economic debate. The event focused on trade, transport and customs policies to support more agile and secure supply chains.

In his opening remarks, **CLECAT President Dimitri Sérafimoff** welcomed the continued cooperation with European shippers, underlining that resilience, economic security, trusted data and strategic autonomy have become essential elements of the transport and trade discussion. Dimitri noted referred to the European Commission's call to act on competitiveness, drawing on the momentum of the Draghi report. Yet he also stressed that progress on reducing administrative burdens remains slow, decision-making processes are still lengthy, and implementation often lacks transparency and predictability for businesses. He also pointed to a recent Clingendael survey on economic security, which shows that while most companies recognise growing geopolitical and supply-chain risks, far fewer are taking concrete steps to address them. This gap between awareness and action, he noted, remains a challenge for Europe's competitiveness.

Roman Stiftner, President of the ESC, underlined that trade and logistics are firmly back on Europe's political agenda. Resilience, economic security, trusted data and strategic autonomy now shape policy discussions, and logistics professionals have moved from the background to the forefront of geopolitical developments. Just-in-time and single sourcing are no longer unquestioned principles; as supply chains grow more complex, the sector's visibility and strategic importance have only increased.

He stressed that global networks remain essential; COVID-19 showed that when supply chains stop, everything stops and that Europe must continue adapting, diversifying and innovating. Innovation goes beyond digitalisation: while AI will strongly benefit the sector, operational, organisational and infrastructural innovation are equally vital. He also noted that businesses are navigating a growing list of compliance obligations, which reinforces the need for clarity and consistent implementation across Member States. At the same time, reducing bureaucracy remains slow, though co-legislators are working toward simplification and a shift from crisis response to long-term preparedness.

Both presidents emphasised the need for stronger cooperation among industry stakeholders and with policymakers to reinforce the resilience and competitiveness of Europe's supply chains.

Luuk van Middelaar, **Founding Director of the Brussels Institute for Geopolitics,** highlighted that Europe has entered a new geopolitical era in which the familiar rule-based international order now coexists with power politics. He described the current moment as a historic turning point, marked by a fundamental shift in Europe's security environment, including the weakening of long-standing U.S. security guarantees. He argued that this new reality leaves Europe somewhat disoriented, because the EU was originally built against the idea of geopolitical power. Yet today, Europe must prepare for a world shaped by strategic competition, contested trade flows, and shifting alliances and must decide whether it needs stronger autonomy or new forms of collective capacity to defend its interests. Luuk emphasised that this shift places the logistics sector directly at the centre of geopolitical risk: supply chains will increasingly feel the impact of great-power politics, and policymakers and industry need to adapt accordingly.

Building on this geopolitical framing, **Professor Indra Vonck, Partner at BDO Belgium** responsible for transport and logistics, turned to today's economic realities. He showed that while Europe's macroeconomic indicators appear relatively stable on the surface, they mask significant structural fragilities. External trade accounts for 22.4% of EU GDP, making the Union acutely exposed to global instability. He demonstrated how a sequence of shocks, from the financial crisis to COVID-19, Russia's invasion of Ukraine, rising energy prices and U.S. trade measures, has created an environment that is "more uncertain than at any time in recent decades."

Indra highlighted how these shocks interact with deeper forces: demographic decline, labour shortages, regulatory pressure, technological acceleration and massive investment needs linked to the green transition. An industry that sees technology as a solution rather than a disruptor has the right approach in his view. He emphasised that geopolitical disruption is now the single largest threat to Europe's transport system, not only because of direct disruption but also because of the regulatory and economic consequences it triggers. His message to industry was that the era of reactive crisis management is over. Logistics companies and policymakers must shift toward proactive, long-term strategic planning, a holistic approach, breaking down internal silos, strengthening cooperation across the chain, and preparing their organisations for a world in which volatility is the norm rather than the exception.

ADAPTING TO THE NEW GLOBAL LANDSCAPE

The first session explored how the logistics sector can adapt to an increasingly volatile global environment shaped by geopolitical tension, trade uncertainty and structural economic shifts.

René Buck, CEO of Buck Consultants International, examined how companies are restructuring their global value chains in response to rising risk. Drawing on BCI's Integral Risk Assessment Method, he showed that risk levels are increasing across multiple dimensions – geopolitical, economic and financial, transparency, natural disasters, labour markets, energy security, supply chain and carbon. In parallel, trade policy interventions have surged, with a sharp rise in discriminatory measures for

reasons ranging from macro-economic objectives and industrial policy to national security and foreign policy.

He then zoomed in on the current US tariff environment with tariffs on all imports, varying between 10&% to nearly 50%. In this context, many firms are moving towards what he called "DE-strategies": de-coupling from China, de-risking supply chains, de-single-sourcing, decentralising production and advancing decarbonisation.

Using BCI survey data, René showed that almost half of companies have already adjusted their manufacturing footprint in the last three years, and a clear majority is expected to do so in the coming three years. Significant volumes are being shifted away from China and wider Asia, with companies assessing different strategies: staying China-centric, adopting a "China + 1" model in Southeast Asia, or pursuing onshoring and nearshoring to Europe and its neighbouring regions. He compared the pros and cons of these options in terms of cost, tariff exposure, supply-security risk, labour markets and CO_2 emissions. He noted that although there is a trend towards moving from "global to local", this does not mean the end of global value chains. The survey results indicate that firms which have started decentralising production report shorter lead times, more resilient supply chains, lower total landed costs and reduced dependency on long-distance transport – in many cases performing as well as or better than expected. At the same time, they face real barriers: finding cost-effective locations, building a capable supplier base, and managing investment and operating costs. Preferred near-shoring destinations to serve the European market include Central and Eastern Europe, Spain and Portugal, Turkey and parts of North Africa, reflecting a clear move towards more regional industrial footprints. These shifts will gradually change how and where cargo flows enter and move through Europe with more regional production and distribution, and new opportunities for logistics hubs and intermodal networks in the European hinterland. Regionalisation of value chains is being accelerated by policy, and even with the recent uncertainties posed by US tariff changes, companies have already begun to act. They are seeking new markets and suppliers, and the EU must offer a favourable investment climate, together with reliable energy availability and competitive prices, to make the most of the opportunities ahead.

Maria Martin-Prat, **Deputy Director-General for Trade and Economic Security at the European Commission**, addressed how these shifts shape the EU's external trade strategy. She emphasised that Europe remains one of the world's most open and interconnected economies, with 60% of global trade involving the EU, either as importer or exporter. This openness is not only a defining feature of Europe's model, but also a competitive asset: access to global markets, critical raw materials, and key technologies is essential for Europe's economic strength.

In today's geopolitical environment, however, openness must increasingly be balanced with economic security and resilience. Although economic security can feel elusive at EU level, it can be translated into a few clear strategic aims: reducing exposure to decisions taken by third countries, keeping EU imports competitive, and managing major external influences such as China. When assessing China, we must also recognise that, beyond its control over the extraction of critical raw materials and rare-earth magnets, the country has also established a dominant position in their processing and in the technologies that rely on them. This significantly increases the complexity of any effort to de-couple from China.

Maria highlighted that Europe is moving from a model focused on efficiency alone to one that incorporates resilience through risk assessments, diversification of supply chains and closer monitoring of strategic dependencies, particularly for critical raw materials, semiconductors and sensitive technologies.

She underlined that strengthening Europe's competitiveness requires advancing free trade agreements with partners such as Mercosur, Mexico and Indonesia, while continuing negotiations with Malaysia, Thailand and India. These agreements help diversify markets, reduce vulnerabilities

and support European industry in a rapidly evolving global landscape. In the meantime, export controls help to prevent the spread of sensitive technologies to Russia and to curb Chinese influence. Maria considers transport and logistics service providers to remain crucial for enabling trade, and DG Trade also recognises the importance of the sector. The WTO is not "dead", despite what many claim; the GATT still stands, as does the need for multilateralism and stability. It may take Europe some time to regroup, revive and modernise, and in the meantime we should also consider moving towards more privileged bilateral agreements.

The next session was moderated by **Anne Kerriou, market analyst at Upply**, the digital platform known for its freight benchmarking and market intelligence tools. Under her moderation, the discussion focused on how companies are adapting to the new market realities, shifting customer expectations, and increasing regulatory and geopolitical pressures. She was joined by **Nanne Schriek, Project Manager Supply Chain Management at evofenedex**, who brought insights from Dutch shippers and the "Supply Changers" community, and by **Jens Roemer, Regional Managing Director at a. hartrodt** and FIATA Senior Vice President.

Nanne Schriek emphasized that traditional risk management remains necessary for dealing with known and predictable risks. However, its value is limited when it comes to the unexpected and unforeseen disruptions that increasingly characterize today's volatile environment. This is precisely why evofenedex advocates investing in five resilience capabilities: redundancy, collaboration, visibility, agility, and flexibility. These capabilities enable shippers not only to withstand unexpected shocks but also to adapt and even emerge stronger than their competitors. Resilience should therefore not be seen as an insurance policy, but as a strategic investment.

Jens contributed the perspective of freight forwarders navigating volatility, rising costs, and the need for smarter collaboration across supply chains. Jens underlined how the role of the freight forwarder has fundamentally evolved. Once the "architects of transport," freight forwarders are now the orchestrators of global connectivity integrating technology, data, compliance, sustainability and risk management into every movement of goods.

He highlighted that forwarders bring unique value through their global networks, destination expertise, and the ability to choose the best carrier, mode or routing solely in the interest of their customers. Jens then turned to the operational reality freight forwarders face in Europe's ports, describing what he called a system now operating "at its edge." Export closing times have expanded up to five days before vessel departure, free demurrage and detention periods have shrunk, and unpredictable vessel arrivals force repeated rescheduling of transports and customs declarations. The result, he noted, is the closing-date paradox: extended cut-offs increase container dwell times, the opposite of what terminals claim to be trying to reduce.

He showed how the combination of mega-ships, volatile rotations, tight free periods and last-minute cut-off changes creates a domino effect: truck queues, warehouse congestion, constant re-planning, and rising costs all of it ultimately absorbed by freight forwarders and their staff. "We don't need external disruptions," he said. "We are disrupted ourselves." He stressed that forwarders are on the frontline: their teams face customer frustration, demotivation and productivity loss as they must

repeatedly cancel and reschedule arrangements due to last-minute changes by carriers and terminals. Despite these pressures, freight forwarders remain uniquely positioned because they hold the most complete end-to-end data, giving them the capability and responsibility to help improve maritime supply-chain performance. Jens concluded with a call for much stronger collaboration across all stakeholders.

Torsten Klimke, **Head of the Ports and Inland Navigation Unit at DG MOVE**, provided an overview of the Commission's forthcoming work on European port policy and the wider transport agenda. He confirmed that the new EU Port Strategy is expected in February 2026, noting that the Commission is not seeking to introduce major new legislation but rather to clarify, align and standardise existing frameworks so they can function more effectively for ports, operators and logistics stakeholders. Torsten stressed that ports are evolving into multifunctional strategic nodes, central both to Europe's economic resilience and to its security architecture. A key policy priority is ensuring the availability of new fuels for clean maritime transport, a challenge that requires coordinated investment, permitting, and infrastructure planning across Member States. He also referred to the recently published Sustainable Transport Investment Plan (STIP), which lays out investment needs to support the green and digital transition of Europe's transport system.

He also underlined the ongoing workforce challenges in ports, where demographic pressures, changing skills needs and competition for talent are creating long-term vulnerabilities. Torsten highlighted the work of the European Ports Alliance, which brings together customs, police, port authorities, and private operators to strengthen integrity and fight organised crime, including through background checks, better information exchange, and common approaches to detecting insider threats. He noted that criminal networks are becoming more sophisticated, which requires ports to modernise their security culture without undermining the fluidity necessary for competitive logistics.

He also linked ports directly to Europe's geopolitical responsibilities. As gateways to the TEN-T network, ports play a decisive role in the military mobility agenda. Torsten pointed to the upcoming Military Mobility Package, due mid-November, which aims to simplify procedures and ensure that dual-use infrastructure, including port terminals, hinterland connections and critical corridors, can support rapid movement during crises.

Anand Gharbaran, Customs Team Leader at Dutch Customs, and Gabriëlla Griffioen, Project Leader for the Mainport Approach at the Rotterdam Seaport Police, provided an inside look at how Rotterdam has transformed its approach to combating drug trafficking and subversive criminal activity in the port. They began by outlining how the situation looked several years ago: no shared sense of urgency, very limited information exchange between agencies, repeated investigations into similar incidents, and security seen as a secondary issue. This environment allowed criminal networks to exploit vulnerabilities in logistical, IT and HR processes, using pincode fraud, insider corruption and operational blind spots to infiltrate the supply chain.

Gabriëlla described how the landscape has since changed through a deliberate, strategic shift: authorities began to work as partners rather than separate enforcement entities, forming a joint community with industry to strengthen the port's overall resilience. Practical steps included the introduction of secure container release,

restricted-access systems, and procedures to prevent unauthorised access to terminals and cargo flows. However, moving from suspicion to cooperation required patience, shared learning, and gradually establishing common goals. Effective public–private collaboration, particularly with freight forwarders, terminals, shipping lines and inland operators, now enables more targeted interventions and a more coordinated approach.

Anand also detailed the role of the long-standing HARC team (Hit And Run Cargo): a multi-agency partnership combining Seaport Police, Customs, FIOD and the Public Prosecutor. Historically focused on rapid seizures and quick arrests, the team has increasingly shifted toward dismantling corrupt structures, restoring lawful authority, and addressing root causes of subversive crime. Their tactical unit now provides 24/7 support for high-risk operations, controlled deliveries, surveillance and responses to "extractors" attempting to remove illicit cargo from containers.

Across their presentation, both speakers stressed that protecting Europe's largest port is not only a law-enforcement task but a shared responsibility across the entire logistics chain.

COLLABORATIVE RISK MANAGEMENT: LIABILITY, CRIME AND TRUST IN SUPPLY CHAINS

The second session turned to **collaborative risk management**, examining how liability, crime and trust can be addressed across increasingly complex supply chains. **Klemen Oven, Deputy Head of Unit for Risk Management and Security at DG TAXUD**, presented the customs perspective on securing global trade flows. He underlined that customs authorities act as the first line of defence in the EU's security architecture, with responsibilities ranging from risk and threat analysis to coordinated action with police, border forces and other enforcement bodies.

Klemen stressed that effective anticipation is the foundation of security. He described work underway to enhance cooperation between authorities, improve secure communication channels and strengthen the EU's capacity to detect threats early. He provided an update on the EU Customs Reform, in which the new Customs Authority and the EU Customs Data Hub will enable real-time, EU-level risk analysis and operational support.

Responding to threats, he emphasised the need to build secure networks of trusted partners ensuring that dangerous or illegal shipments can be identified and intercepted as early as possible. He also outlined the role and challenges of the EU Do Not Load (DNL) mechanism for deep-sea container shipments, which is designed to address the most serious risks, including CBRNE threats, but currently faces operational and legislative limitations.

Klemen concluded by highlighting the importance of bringing collaboration to the next level. He called for deeper engagement across the maritime chain, from port authorities and terminal operators to carriers, international bodies and third-country customs administrations. Building on initiatives such as the European Ports Alliance and using instruments such as the AEO guidance, he stressed that capacity building, common standards and mutual trust are essential to strengthening the integrity of Europe's maritime supply chains.

Andreas Wilhelm, Head of Corporate Security at Kuehne + Nagel and Chair of the CLECAT Security Institute, offered a detailed analysis of the pressures facing international supply chains. He began by framing supply chain security within the concept of organisational resilience, as defined in ISO 22316, noting that companies must be able to absorb and adapt to constant changes in their operating environment.

He explained that today's supply chains face an unusually wide range of disruptions. These include threats caused by human actions, such as border closures, social unrest, industrial action, and various forms of warfare. Natural disasters and pandemics continue to impose large-scale shocks. On top of this, cyber-attacks and organised crime have become increasingly sophisticated, ranging from ransomware and phishing to hybrid operations that combine digital and physical intrusion. Critical infrastructure such as ports, airports, rail networks, warehouses and communication systems can all be affected simultaneously, and even partial disruption can cascade quickly across global networks.

A key message in his presentation was the importance of effective regulatory frameworks. Regulations are meant to safeguard essential services for the population, including energy, healthcare, drinking water, food supply, digital communications, banking and transport. For these frameworks to work, Andreas argued that they must be harmonised, outcome oriented and built on existing international standards rather than duplicating requirements. He pointed out several shortcomings in the current system, including insufficient coordination between Member States, inconsistent implementation, lack of consultation with industry specialists, and the risk of unilateral decisions that can unintentionally paralyse supply chains, as witnessed during the COVID-19 border closures.

From there, he turned to practical risk mitigation. He outlined how companies use intelligence-based assessments to understand geographical areas of elevated risk, evaluate tactics used by criminal groups and monitor changes in threat levels. This enables targeted countermeasures, such as avoiding unsafe locations, strengthening access controls, improving entitlement verification and enforcing secure stops through geofencing. He described how cargo theft has evolved from opportunistic incidents to organised, technology-supported operations, with thieves impersonating legitimate carriers, exploiting weaknesses in subcontracting chains, and conducting coordinated attacks on vehicles and warehouses. To respond to this growing complexity, Andreas presented a layered approach to risk mitigation that combines personnel training, strict access and entitlement controls, improved cybersecurity, physical deterrents, and enhanced monitoring for high-value transports. He referred to examples such as background screening, driver security training, intrusion detection systems, secure parking standards, and new technologies including anti-jamming systems and red-teaming exercises.

John Wolf, Attorney, Wolfs Advocaten, emphasized the importance of drawing up a contract between supply chain actors and ensuring that the parties agree on the applicable law. The distinction between national and EU law must be respected. The rules on customs representation vary between Member States, and parties may contract separately for this; however, in practice, even where a contractual agreement exists, which is more the exception than the rule, the terms usually refer to national trade associations' terms and conditions. In the Netherlands, for example, these are usually the FENEX conditions, which are rather biased towards the agent, limiting liability to EUR 10,000 and establishing that all work is carried out by the agent at the client's risk.

The contract between supply chain actors should be viewed as a core instrument, and it must clearly define the applicable law. This is all the more important as the use of standard frameworks such as INCOTERMS and the CISG (United Nations Convention on Contracts for the International Sale of Goods) is not mandatory. Moreover, INCOTERMS shift liability across the entire supply chain – it is not just bilateral.

The Customs Reform will also change the current customs liability structure significantly, making written contracts even more essential. Supply chain actors relying on general terms and conditions set out by third parties are strongly advised to familiarise themselves with these before committing to the m.

Barry van Leuven, CEO of Pionira, delivered presentation on the shift "from paper chaos to digital efficiency." He began by addressing the *FUD* - fear, uncertainty and doubt - that still surrounds digitalisation in transport and logistics. Using real concerns raised by transport companies, he demonstrated how modern e-document solutions directly counter these doubts: platforms today are plug-and-play, implementation takes days rather than months, documents are more secure than paper thanks to encryption and ISO 27001/GDPR protections, and digital workflows actually increase control and visibility through real-time status updates and full audit trails.

Barry stressed that digitalisation does not replace people; it empowers them by removing repetitive administrative tasks so they can focus on higher-value customer-facing and operational work. For companies not ready to switch entirely, he explained that hybrid models allow digital and paper processes to coexist without disrupting operations, a point particularly relevant for forwarders managing complex, multi-party movements. He then clarified the often-misunderstood distinction between eCMR and the eFTI Regulation. eFTI thus creates the legal backbone for digital acceptance by authorities, while eCMR provides the operational tool for industry.

Barry illustrated the growing breadth of digital documents: eCMRs, the digital *carta de porta*, national and cross-border waste transport documents, eECD cleaning documents, and non-statutory attachments such as proof of delivery, photos and delivery notes. He highlighted quantifiable benefits: 75% lower administration costs, 80% faster processing, and 94% fewer errors, supported by a case study from Zoutman, where integration with the ERP system and weighbridge cut administrative work significantly and improved customer satisfaction.

Looking ahead, Barry emphasised the importance of preparing now. He presented a clear step-by-step implementation plan, encouraging companies to run small pilot projects, scale gradually, and prepare their systems for the upcoming 2027 deadline. He pointed to everyday digital processes e-invoicing via Peppol, SWIFT payments, digital identity, online commerce as proof that logistics should not remain an outlier surrounded by piles of paper while automation accelerates elsewhere. He closed with a simple message: the future is digital, and companies that start early will be future-proof, more efficient, and ready for full eFTI compliance.

Aljosja Beise, CTO of Docklab, outlined how emerging technologies can significantly improve the efficiency, compliance and resilience of supply chains. He introduced Docklab as the Port of Rotterdam's emerging technology R&D arm, now a 30-person team working on digital solutions that accelerate the energy transition and support faster, more resilient logistics. Originally founded in 2017 as a small innovation lab, Docklab has evolved into a venture builder with several technology spin-outs and patents.

Aljosja structured his talk around what he called the "ABC" of emerging technologies: AI, Blockchain, and Connected IoT. He explained that AI can eliminate the widespread "machine-to-paper-to-machine" processes that still dominate logistics. Tasks such as generating customs declarations, entering orders or matching invoices can be automated with far greater flexibility than traditional OCR-based systems. According to Docklab's projects, companies can achieve up to 70% time savings and 85% fewer errors, freeing staff to focus on higher-value activities.

He then turned to blockchain as a response to the rapidly growing list of compliance requirements in Europe and worldwide. He pointed to regulations such as ESPR, CSRD and CSDDD, as well as new U.S. rules requiring detailed information on the origin of raw materials. For the EU's forthcoming Digital Product Passport, blockchain tokens can serve as secure carriers of structured product information, linking verified data to transformation steps across the chain. Combined with AI, these tools help onboard long-tail suppliers without forcing them into new workflows.

He explained the development of a new device called the "Digital Nose", which is designed to detect airborne chemical traces used in the production of cocaine. The air inside a container carries a distinct digital fingerprint made up of these molecules, and the device can identify them. He added that this applies not only to such chemicals: every product – from counterfeit goods such as fake Nike items to copper or other materials – has its own digital fingerprint, and the aim is to train the Digital Nose to recognise these as well.

Finally, he touched on the role of connected IoT, highlighting the shift from isolated devices to integrated networks capable of capturing real-time operational data. When combined with AI and blockchain, IoT enables end-to-end visibility, traceability and more proactive decision-making. Aljosja closed by emphasising that these technologies are no longer speculative: they are already being deployed in industry. Used together, they create digital foundations for supply chains that are more efficient, compliant by design and resilient to growing operational and regulatory pressures.

Sophie t'Serstevens, Kuehne Climate Center, presented the **Life-Links Framework,** a collaborative approach designed to strengthen the critical transport links that keep supply chains moving. She explained that the Framework brings together diverse actors affected by supply chain disruptions to co-develop and co-invest in measures that enhance shared resilience while supporting climate action and local sustainable development. The methodology guides users through three steps, risk assessment, selection of action measures, and coordinated implementation, supported by practical examples and resources. Ms t'Serstevens highlighted that climate hazards increasingly threaten logistics systems across all modes and hubs, impacting infrastructure, operations, and the workforce, and underlined the need for coordinated action to address these growing vulnerabilities.