LogiSYM

The Magazine for Supply Chain Executives

OCTOBER 2026

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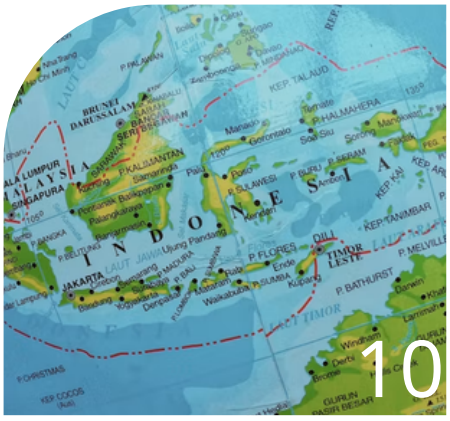
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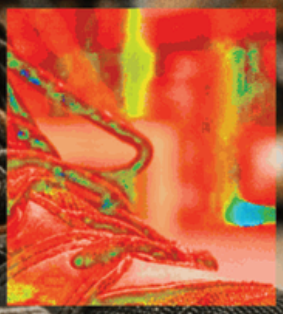
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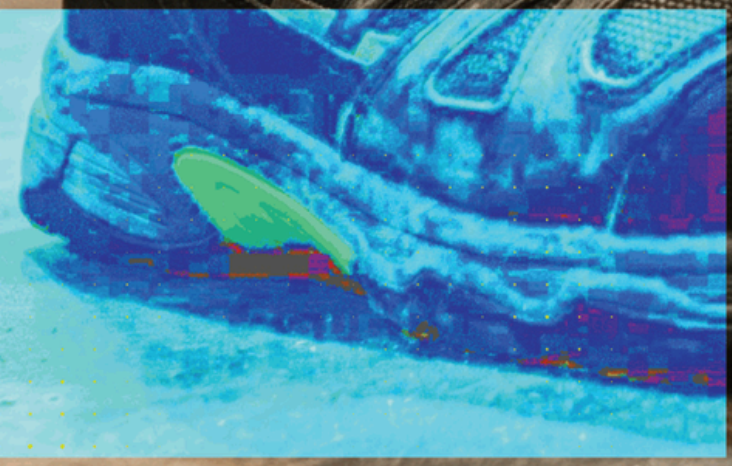
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EDITORIAL MESSAGE

From the Editor

Welcome to the October 2026 edition of LogiSYM Magazine and our theme this month of "Workforce of the Future: Talent, Skills and Leadership in Logistics".

Logistics employers need people who can work confidently with technology. They must understand the process change occuring and consequences thereof. They also need to give those people reasons to stay.

The workforce challenge and process change becomes clearer on the warehouse floor: a picker must learn to work alongside mobile robots; a transport planner needs to interpret route optimisation recommendations; a supervisor must manage an automated operation while developing the team's skills.



Recruiting for these roles takes more than adding "digital skills" to a job description. Employers must provide training during working hours, explain career options and prepare managers to support people whose jobs are changing.

Future leaders will need enough technical understanding to question systems and recognise when human judgement should prevail. They must explain difficult decisions, handle concerns about job security and coach colleagues with different levels of experience. Identifying potential, giving staff responsibility and making time for learning will become essential management skills, with managers held accountable for developing their teams.

Two of our feature articles will examine what these demands mean for logistics businesses, offering perspectives on attracting talent, building skills and leading a workforce with changing expectations: "Building Asia-Pacific's Digital-Native Supply Chain Workforce" by Huay Ling Tay and "Talent, Skills and Leadership in Logistics for the Workforce of the Future".

We have a recap of some key messages from a fabulous LogiSYM Phillippines 2026 in Manila in September, and Wolfgang Lehmacher, Mikael Lind and Shad Blidberg Hallam look at the industry challenges arising from the expanding use of data connectivity platforms in "Who Pays for Shared Visibility?". Also looking at the topic of data is Oana Jingga with her article "From Manual Tasks to Data - Driven Decisions: The Changing Role of the Warehouse Teams".

We will begin to look at the Future of Procurement with the first of Vera Rozunova's three-part series, Procurement 2050: From Cost Management to Resilience Architecture, and Mike Nissen returns with Intralogistics Corner.

Our final month of Symposiums in Thailand, Vietnam and Indonesia makes for an exciting November and we look forward to seeing you there.

Brett Marshall
Editor-in-Chief
LogiSYM Magazine



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LSCMS PRESIDENT'S MESSAGE

Beyond the Algorithm: Architecting the Human Engine of Modern Supply Chains in the Never Normal

As we enter the last quarter of 2026, the global logistics sector finds itself navigating a landscape of the "Never Normal". From ongoing maritime security risks across critical choke points to severe weather disruptions across key Asian hubs, schedule reliability has hit historic lows. While headline container rates have softened in certain lanes, the true cost of trade is increasingly measured in extended transit times, absorbed capacity, and severe port congestion.

Amid these persistent physical bottlenecks, our industry is simultaneously undergoing a profound structural transition. The rapid integration of autonomous AI logistics agents and advanced predictive systems is reshaping how we respond to disruption. We are no longer simply reacting to delayed vessels or rolled cargo, we are starting to algorithmically reroute supply lines before disruptions fully materialise. High-tech peak season demand, particularly driven by global AI infrastructure and semiconductor expansion is putting unprecedented pressure on both ocean and air freight channels.

As many have said before however, the most sophisticated digital architecture is fundamentally constrained by human execution. As technology shifts from an operational tool to an autonomous driver, the true bottleneck in modern supply chains is no longer vessel capacity or software design. It is the human capability required to lead, govern, and deploy these complex networks and we are continuously encountering gaps in this area.

True supply chain leadership today requires a deliberate bridging of two worlds. While advanced economies often view digital transformation through the lens of pure automation and cost reduction, operating within the Global South teaches us that technology is only as resilient as the human systems supporting it. Without a workforce capable of interpreting complex cross-border realities, managing digital-native architectures, and executing with agility on the ground, even the most sophisticated supply chain strategies crumble under real-world pressure.

As we look ahead to the final quarter of the year, our priority must extend beyond optimising algorithms or expanding physical fleets. Success in this era demands that we invest just as aggressively in cultivating adaptive, highly skilled leadership. I look forward to engaging with you all as we continue to redefine what it means to build truly resilient, future-ready global supply networks.

Raymon Krishnan, FALA, FCILT, CLP
President The Logistics & Supply
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Building Asia-Pacific's Digital-Native Supply Chain Workforce

Feature Article by Huay Ling Tay, Associate Professor, Logistics and Supply Chain Management, School of Business, Singapore University of Social Sciences

For most of its history, the supply chain workforce conversation has been about capacity: how many warehouse hands, how many drivers, how many planners does a growing network need? That conversation has now been overtaken by a harder one - not how many people, but which capabilities, and how fast can they be built? According to the World Economic Forum's Future of Jobs Report 2025, employers expect 39% of worker's core skills to change by 2030, and skills gaps remain the single largest barrier to business transformation, cited by 63% of employers surveyed.

Supply chain and logistics sit among the sectors leading this churn, alongside telecommunications and information technology services. For Asia-Pacific, a region that has built its competitive advantage on logistics infrastructure and trade connectivity, this is not an abstract statistic. It is a live operational risk and an equally live opportunity.

THE DIGITAL-NATIVE SUPPLY CHAIN HAS ALREADY ARRIVED

“Digital-native” logistics is no longer a future state to plan for; it is the operating environment many practitioners are already working in, whether their job titles have caught up or not. Warehouse management and transport management systems, predictive analytics for demand and risk sensing, and increasingly autonomous material handling are now baseline infrastructure rather than differentiators.

Singapore's own trajectory illustrates the pace: Skills Future Singapore's Skills Framework for Logistics, developed with the Economic Development Board and industry partners, was built explicitly around the shift toward predictive, data-enabled supply chain agility and risk management. More recently, Clarion Shipping’s "Singapore's Logistics Workforce 2026” analysis has projected the sector could generate around 2,000 new jobs in Singapore alone, with hybrid roles—logistics expertise fused with data, automation, or IT capability—identified as the highest-demand profile.

The story is similar across the region's other logistics hubs, where port automation, smart air-cargo processing, and e-commerce fulfilment are compressing the distance between “operations” and “technology” job families.



This matters for how we define talent. A digital-native supply chain does not simply add a layer of technologists on top of existing operations teams. It requires operations professionals fluent enough in data and systems to direct the technology and technologists who understand enough of the physical, regulatory, and commercial realities of moving goods to build tools that actually work on a dock, in a customs queue, or on a last-mile route. The winning organisations in this transition are not the ones hiring the most engineers; they are the ones that can translate between the two worlds.

NEW SKILLS IN DEMAND: HYBRID, HUMAN, AND INCREASINGLY AI-LITERATE

Three skill categories are converging in the region's job postings and training frameworks. The first is hybrid technical fluency - the ability to work competently with WMS/TMS platforms, automation projects and sustainability-reporting tools, which recruiters increasingly treat as baseline rather than specialist competence. The second is a set of durable human skills that the WEF report identifies as growing in tandem with technical demand: analytical thinking, resilience, flexibility and agility, and leadership and social influence. These are not soft add-ons; they are what allow a professional to keep making sound judgement calls as the tools around them change every eighteen months. The third, and the one reshaping curricula fastest, is applied AI literacy - not the ability to build models, but the ability to specify a problem clearly, evaluate an AI-generated recommendation critically, and know when to override it.

I see this third category up close. In redesigning executive and postgraduate teaching, I have been working through what applied AI literacy actually looks like for a supply chain professional who is not, and does not need to become, a software engineer. The useful skill is not coding fluency for its own sake; it is a disciplined workflow - specifying a problem precisely, generating a candidate solution with AI assistance, inspecting it critically, validating it against real operational constraints, and iterating. That five-step loop maps cleanly onto the Define-Measure-Analyse-Improve-Control logic that supply chain professionals already know from Lean Six Sigma, which is precisely why it transfers well. The skill worth hiring and developing for is not “can this person use AI tools?" but “can this person direct AI tools toward a validated, defensible operational decision.”



RETHINKING ATTRACTION AND RETENTION

If the skills profile is shifting this fast, workforce strategies built around fixed job descriptions and static training calendars will not hold. Three shifts are worth naming. First, attraction has to compete on growth trajectory, not just on role. Younger entrants increasingly evaluate logistics careers by how much a role will teach them, not only what it pays; organisations that can show a credible upskilling pathway - the kind Singapore SkillsFuture’s “Queen Bee” model is designed to cascade through SME networks - have a real advantage over those offering only a static job scope.

Second, retention in a fast-changing sector depends on visible investment in continuous learning, not one-off onboarding. WEF data shows a workforce that has already internalised this: half of employees globally report completing some reskilling or upskilling in the past year, up from 41% previously. Employers who fall behind that expectation will lose talent to those who don’t.

Third, and often underweighted, is the workforce already inside the organisation whose

institutional knowledge a new hire cannot replace. This is especially visible in defence and public-sector logistics, where experienced logistics officers must be brought up to speed on large-scale digital operations without discarding decades of hard-won operational judgement.

Structured short courses that pair working professionals with practitioner-educators, rather than generic online modules, are proving far more effective than either extreme: “send them back to full-time study” or “hope they pick it up on the job.”

THE EDUCATIONIST'S STAKE: RETHINKING HOW WE TEACH, NOT JUST WHAT

As educators, our obligation has shifted from delivering static content to designing for a moving target - and from certifying knowledge to certifying judgement. Two implications follow. The first is assessment redesign. If a student can generate a passable answer with an AI tool in seconds, the assessment has to test something the tool cannot do on its own: whether the learner can specify the right problem, interrogate the output, and defend a decision under real constraints.

The second is closer partnership with employers on what “job-ready” means now, so curricular track the sector's actual skill churn rather than a syllabus fixed years ago. None of this displaces the fundamentals - network design, procurement strategy, inventory economics, risk management - that remain the backbone of sound supply chain practice. What it changes is the expectation that graduates and mid-career professionals alike can move fluidly between that fundamental knowledge and the digital tools now built around it, without losing the judgement that makes either one useful.

LEADERSHIP IS THE MULTIPLIER

Talent and skills investment will underdeliver without leadership that models the behaviour it asks of the workforce. Leaders who treat AI adoption, sustainability reporting and digital transformation as IT-department projects rather than core operational literacy will find their reskilling budgets absorbed without changing outcomes. The Asia-Pacific supply chain sector has spent two decades building physical and digital infrastructure that is the envy of much of the world.

The next competitive edge will not come from more infrastructure. It will come from a workforce and a leadership cohort capable of directing that infrastructure wisely as the tools underneath it keep changing. That is a talent strategy, an education strategy, and a leadership strategy all at once - and the organisations that treat it as one integrated problem, rather than three separate ones, will be the ones still setting the pace in 2030.



Huay Ling Tay

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Huay Ling Tay is an Associate Professor in Logistics and Supply Chain Management at the Singapore University of Social Sciences' School of Business, where her research spans lean and sustainable supply chains, humanitarian logistics, and AI-enabled workforce readiness.

She teaches postgraduate, executive, and uniformed-services logistics education and serves as Associate Editor at Cogent Business and Management.

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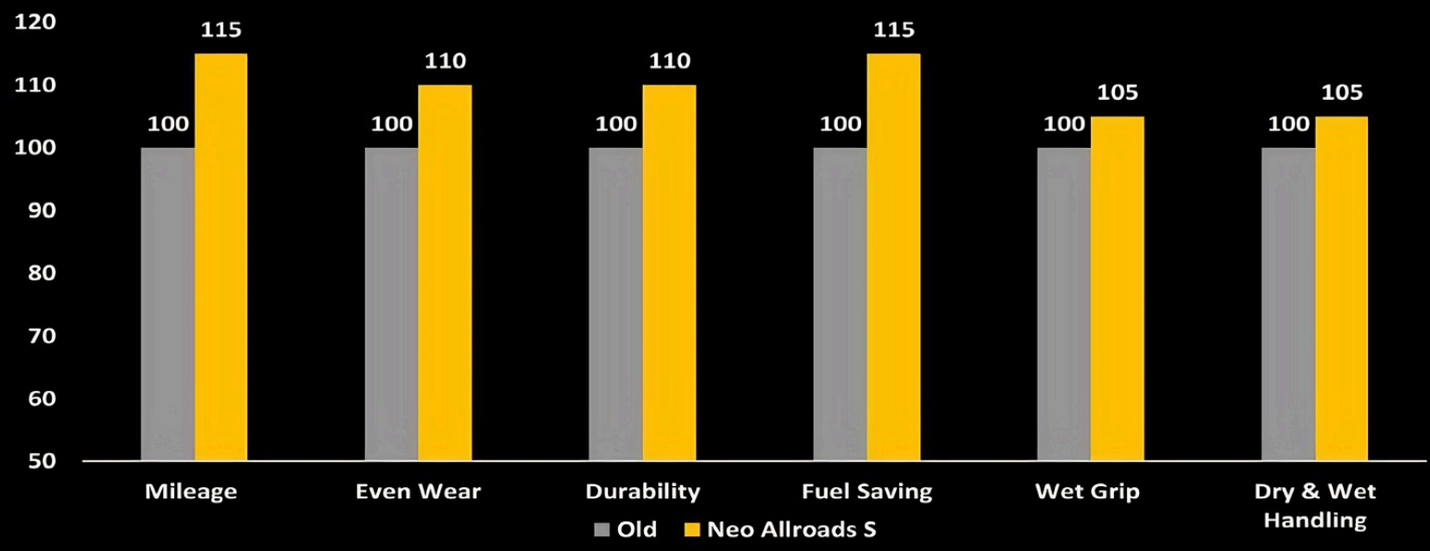






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Talent, Skills and Leadership in Logistics for the Workforce of the Future

Feature Article by Wayne, Yoshida Managing Director Top Transport Talent

Two years ago, Top Transport Talent asked Japan's logistics leaders what skills, people and technologies they would need for the future. Their answers look increasingly relevant today.

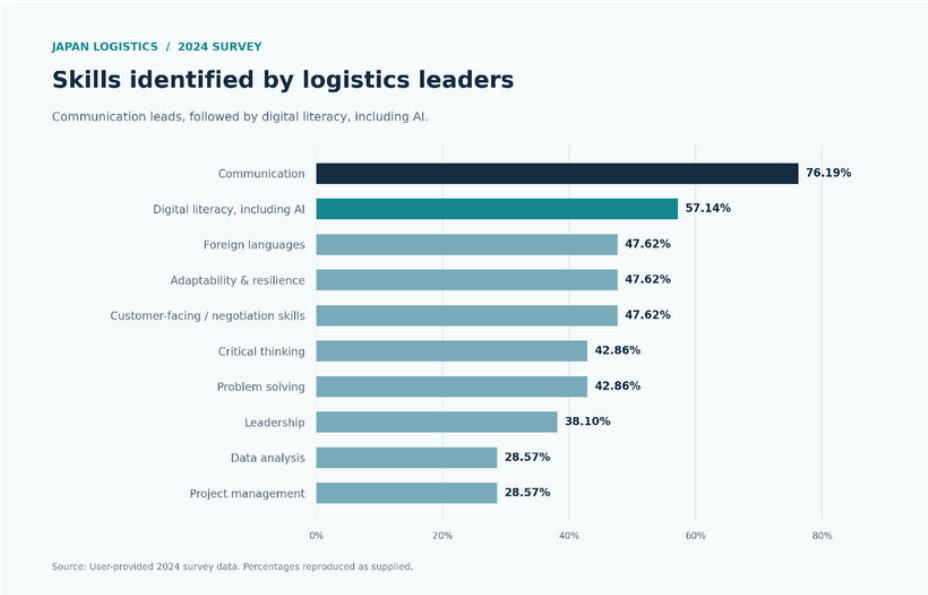
In 2024, Top Transport Talent surveyed 35 Country Managers and Directors across Japan's logistics industry. More than 90% told us that a lack of qualified candidates was already their biggest recruitment barrier. Solution Sales and Key Account Management was the hardest talent to find, cited by 61.9% of respondents, followed by Field Sales at 52.38% and Supply Chain/Logistics Managers at 38.1%. But we also asked a more interesting question: What would the logistics workforce need five years from now?

We are now two years into that five-year window. And the answers suggest that Japan's workforce challenge is evolving from simply "Where do we find enough people?" towards a more complicated question: How do we get more capability, judgement and productivity from a workforce that is becoming increasingly difficult to replace?

THE SKILLS LOGISTICS LEADERS PREDICTED ARE BECOMING THE SKILLS THAT MATTER

Our 2024 research produced a striking result. When logistics executives were asked which capabilities would become most important during the following five years, they did not put technology first. They put communication first. That combination is revealing.

The workforce of the future is not simply a more technologically capable version of today's workforce. It is a workforce in which technology capability and human judgement increasingly have to coexist. A transport planner may receive an AI-generated route recommendation, but still needs enough operational knowledge to recognise that it overlooks a delivery restriction. A customer-service employee can use AI to produce a shipment update in seconds, but still needs to recognise when an unhappy customer requires a conversation rather than another automated email. A warehouse manager can have increasingly sophisticated productivity dashboards, but still needs to understand what the data does—and does not—tell them. The skill is therefore not merely using technology. It is knowing when to trust it, when to question it and when



human intervention is required.

TECHNOLOGY WAS SUPPOSED TO HELP SOLVE THE LABOUR PROBLEM. IT STILL CAN.

Our 2024 survey also asked Japan's logistics leaders which technologies offered the greatest potential to improve productivity and mitigate labour shortages. Their leading answers were:

Since then, Generative AI has accelerated the conversation dramatically. But this creates an important distinction we explored in our recent CargoNow analysis, "Beyond the Hype: Is AI Really Making Shipping & Logistics More Productive?"

Saving time on a task is not necessarily the same as improving productivity across the business.

If technology makes administration faster, management still needs to determine whether the released capacity improves service, supports additional growth or genuinely reduces cost. That means the workforce question and the technology question can no longer be separated.

The relevant management question is no longer: "How many people can AI replace?" It is: "How should we redesign work when people and technology can each do different parts of the job better?"

There is also a hidden risk: where will tomorrow's experts come from? Logistics has traditionally developed expertise through repetition. Junior employees make bookings, prepare documents, track shipments, investigate exceptions and gradually learn what can go wrong. Automation can remove much of that repetitive work. That sounds entirely positive—until we ask:

What happens to the learning that used to take place while doing it?

Our recent AI analysis raised precisely this issue: if junior employees increasingly approve AI-generated output rather than creating and investigating work themselves, companies need another mechanism through which they acquire operational judgement. Otherwise, companies could unintentionally automate away part of their management development pipeline. That makes mentoring, exception reviews, simulations and supervised operational experience more—not less—important in an AI-enabled workplace.

JAPAN CANNOT RECRUIT ITS WAY OUT OF THE PROBLEM

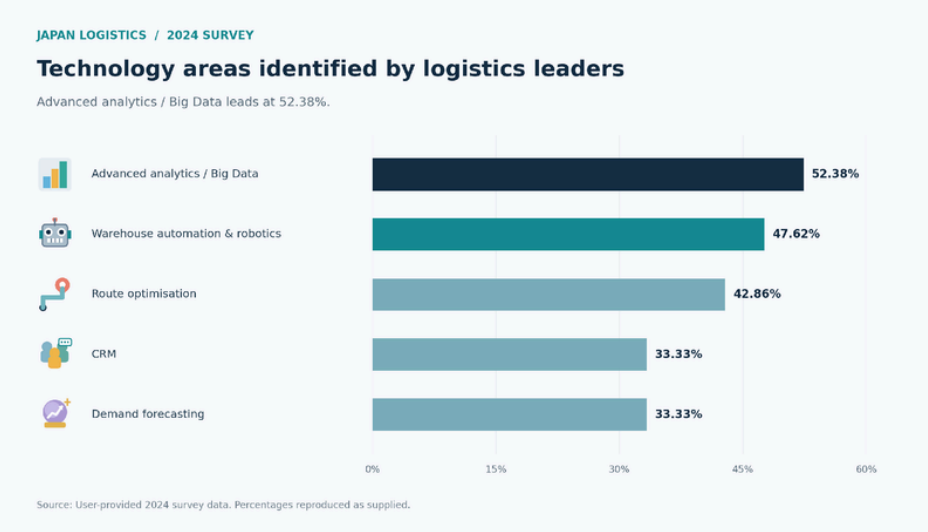
There is a second lesson from our original research. In 2024, companies were already attempting to expand the available talent pool: Those approaches remain important. But when more than 90% of an industry reports difficulty finding qualified talent, continuously competing for the same experienced candidates cannot be the entire solution. Companies have to become better at creating talent as well as buying it. That requires a change in recruitment philosophy. Instead of asking whether somebody has already performed exactly the same job for a competitor, employers should separate:

What must this person know on Day One?
from
What could a capable person learn in six or twelve months?

That distinction potentially opens the market to candidates with transferable experience while protecting the specialist requirements that genuinely matter.

ENGLISH REMAINS A PARTICULARLY JAPANESE CONSTRAINT

Our 2024 research found that the number-one recurring skills



gap was English, followed by problem solving. This continues to create a particular challenge for international logistics companies in Japan. Some positions genuinely require sophisticated Japanese for customers and negotiation together with English for regional or global communication. Others do not. Yet employers can easily write job descriptions requiring "business-level English" simply because that requirement has always been there.

The better question is: What communication does this person actually need to perform? If English is essential every day, test for it. If it is used twice a month on a regional call, perhaps it can be developed. The same discipline should apply to systems experience, industry background and other specifications. In a constrained labour market, every unnecessary requirement reduces the available talent pool.

Retention is becoming workforce strategy There was another strong signal in our 2024 data. 76.19% of surveyed logistics employers were already offering remote-working options and the same proportion flexible working hours. 57.14% were investing in training and development, while 42.86% were increasing base pay. but when we asked what would matter in the future, employers anticipated greater emphasis on career development, mentoring, work-life balance, organisational culture, employee wellbeing and continuous feedback. That prediction is important.

RETENTION IS NO LONGER SIMPLY AN HR METRIC.

When experienced employees contain knowledge about customers, operational exceptions, local suppliers and recurring problems that cannot easily be replaced, retaining knowledge becomes an operational capability. Companies therefore need visible career pathways. A Customer Service employee should be able to see a route towards Key Account Management. An operations specialist might move towards process improvement. A warehouse team leader might develop into automation or continuous improvement. Employees are more likely to imagine a future with an organisation when the organisation can show them what that future might actually look like.

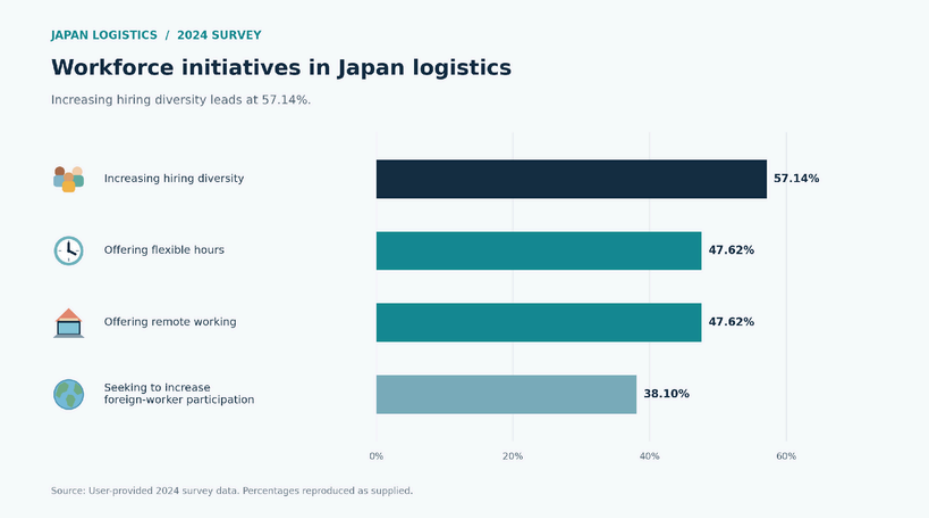
And leadership may be the overlooked workforce skill: Our original research placed leadership below communication, digital capability and several other skills at 38.1%. Yet leadership may ultimately determine whether all the others succeed. Being an excellent freight forwarder does not automatically make somebody an excellent manager. Front-line managers increasingly need to coach people, manage hybrid teams, introduce technology, handle performance, transfer knowledge and explain organisational change. Regional leaders face another challenge: translating global initiatives into something that actually works in Japan.

A process that appears efficient from Singapore, Hong Kong or European headquarters can create additional work locally if Japanese customer expectations, language requirements or operational realities were not considered during its design.

The future logistics leader therefore needs to operate in both directions: translate global strategy into local execution—and translate local reality back to global management.

FROM LABOUR SHORTAGE TO WORKFORCE REDESIGN

When we conducted our research in 2024, the immediate issue was clear: Japan did not have enough



logistics talent. That problem has not disappeared. But the next phase is broader.

PEOPLE + TECHNOLOGY + SKILLS + LEADERSHIP + BETTER-DESIGNED WORK

Japan's logistics companies cannot control demographics. They can control how narrowly they recruit. They can control whether employees receive meaningful training. They can control whether technology removes work or improves it. They can control whether experienced knowledge is transferred before people leave. And they can control whether employees can see a career worth staying for. Our 2024 research concluded that logistics employers needed to become more creative about hiring, invest in skills and provide increasingly personalised approaches to retention. Two years later, that conclusion looks less like a recommendation and more like an operating requirement. The workforce of the future will not simply be recruited. It will have to be built.



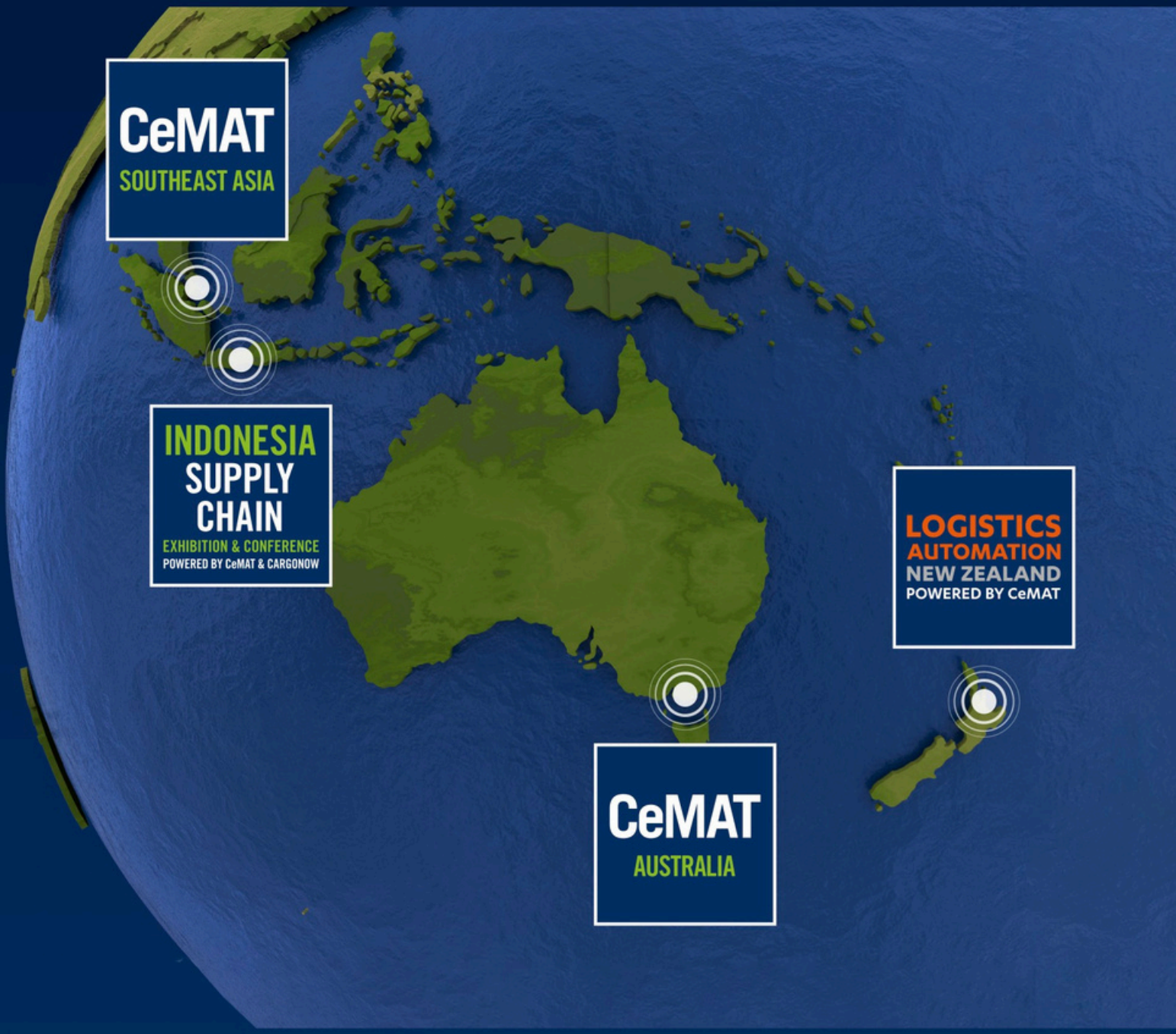


Wayne Yoshida

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BEYOND FREIGHT: A RECAP OF KEY MESSAGES FROM LogiSYM Philippines 2026

At LogiSYM Philippines 2026 in the World Trade Center Metro Manila, 16–17 September 2026, the debate was not about whether logistics needs more technology. It was about what technology, policy and management must do in practice: keep factories supplied, move cargo without avoidable delay, give people usable information and provide credible alternatives when a route or supplier fails.

Vivian Sulit Santos of the Philippine Economic Zone Authority (PEZA), Vicente Gregorio "Gregg" S. Sebastian of the Philippine Multimodal and Logistics Association Inc., and Jemabel D. Boncajes of Mitsubishi Motors Philippines each came at the issue from a different starting point. Santos spoke for the investment and industrial-policy agenda; Sebastian for the operating realities of freight and fulfilment; Boncajes for a manufacturer dealing with supply risk. Their conclusions were closely aligned.

Philippine supply chains need better links between parties, clearer ownership of outcomes and plans that work when normal conditions break down.

INDUSTRIAL POLICY NEEDS OPERATIONAL FOLLOW-THROUGH

Santos argued that supply-chain performance belongs on the national economic agenda. PEZA's task is not limited to administering industrial estates. Its 436 economic zones and roughly 4,400 located enterprises form part of the country's production and export base. PEZA reported 387 registered businesses, ₱11 billion in investment and 7,200 direct jobs as of December 2025. Her focus was on how those zones function as part of a wider production system.

That means closer working links between located enterprises, local suppliers, ports, utilities, training institutions and government agencies.

The policy aim is to raise local participation in export manufacturing under the Tatak Pinoy programme, rather than leave domestic firms at the edge of foreign-investment supply chains. PEZA is also pushing its one-portal system and paperless, cashless transactions. The point is straightforward. A shipment can be delayed even when the truck, warehouse





and vessel are available if a clearance, payment or document is trapped in a separate process. Faster approvals and better visibility will not solve every bottleneck, but they can remove friction that businesses otherwise carry in lead times and inventory. Santos paired that agenda with workforce development. PEZA plans to launch an AI Tech Academy and continues training initiatives with DOST-MIRDC, TESDA and universities. The practical test will be whether companies can find people who understand both the systems being introduced and the work those systems are meant to improve.

FREIGHT IS ONLY PART OF THE JOB

Sebastian gave the operating definition of the shift. "The future of logistics must solve the problem of logistics," he said. That was less a slogan than a warning against technology projects with no bearing on cargo flow. He drew a distinction between freight and fulfilment. Freight is the movement of cargo. Fulfilment means completing the customer requirement, even when that requires customs coordination, tracking, warehousing, inventory information, distribution and final delivery. A logistics provider does not need to own every asset to take that responsibility. It does need to know where its own capability ends, where a partner takes over and who is answerable when the whole chain does not work. Sebastian's example was the empty-container return. A trucker who leaves without knowing whether the depot can accept the box risks a wasted trip. That failure then becomes queueing, yard pressure, driver time, fuel burn and added cost.

The issue is not glamorous, but it is typical of the small breaks that damage logistics performance every day. His recommendation was to join up information already held by terminals, depots, trucking companies and other parties. A useful system would tell a trucker before departure whether a return can be accepted and whether there is capacity. Artificial intelligence has a place, he said, when it helps foresee such problems rather than produce an explanation after they occur. He also urged the industry to stop treating meetings as an outcome. Select a problem, run a time- bound pilot and measure the result. For empty returns, that could include waiting time, failed attempts, unnecessary truck movements and the time taken to return equipment. If the numbers do not improve, change the approach.

RESILIENCE HAS A PRICE, AND SO DOES FRAGILITY

Boncajes put those operating questions into the context of geopolitical risk. Manufacturers once built networks mainly around cost, scale and efficiency. That approach has been tested by the pandemic, semiconductor shortages, war, trade-policy changes and transport disruption. The question now is whether a company can continue making and delivering products when one part of the network is unavailable. Her answer was not to abandon China. It remains an important manufacturing centre. The change is to avoid relying on one country, one port, one supplier or one upstream source. China+1, friend-shoring, near-shoring and multi-factory arrangements are ways of spreading exposure across

locations. She described ASEAN as a production network with different strengths: electronics in Malaysia, automotive capability in Thailand, manufacturing growth in Vietnam, and assembly and talent in the Philippines. That view carries a challenge for the Philippines. It must make itself easy to use within regional production networks, with dependable gateways, suppliers, skills and transport links. Boncajes was particularly clear on supplier mapping.

Four Tier 1 suppliers may appear to provide diversity, but they do not if they all depend on the same Tier 2 or Tier 3 source. Companies need to find those hidden dependencies before a disruption exposes them. The response is not simply to hold more stock. It is to build options: alternative suppliers, ports and routes; product designs that can be changed or transferred; and stock held against specific risks. Business-continuity plans must also be tested against credible scenarios. Boncajes used the possibility of a Batangas port closure to illustrate the point. A company should already know its alternative gateway, transport plan and production response.

A COMMON AGENDA

The three presentations described different parts of the same job. PEZA is working on the public infrastructure of investment, permits, industrial zones and skills. Logistics providers must manage the hand-offs between assets, systems and companies. Manufacturers must design sourcing and production networks that can absorb disruption. The common requirement is discipline. Better data must reach the people who can act on it. Partnerships must have clear responsibilities. Digital projects must be judged against a real operating problem. And resilience plans must identify the precise point at which a supplier, route or port can fail. For the Philippines, the opportunity lies in making those basics dependable. That is what will matter to manufacturers deciding where to add capacity, to shippers deciding which gateways to use and to logistics firms trying to move from carrying freight to managing the result.



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Who Pays for Shared Visibility?

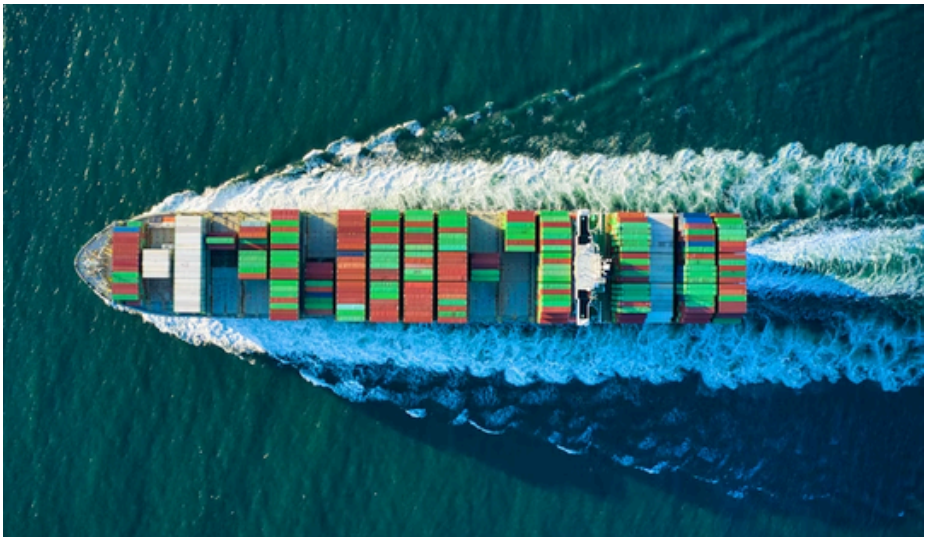
Feature Article by Wolfgang Lehmacher, Global Supply Chain Advisor & Former Director · World Economic Forum,
Mikael Lind, Senior Strategic Research Advisor & Adjunct Professor · RISE · Chalmers &
Shad Blidberg Hallam, Founder & Executive Lead, Nomon AB

A shared infrastructure needs a budget. So does the work that keeps its information useful. Supply-chain leaders should settle both before they count the benefits. A supply-chain platform can balance its books while the cooperation behind it makes little business sense.

Membership fees may cover software, security and support without covering the work needed to keep the information accurate. Paying for the platform does not settle who pays for that work. Consider a forwarder correcting a shipment update so a customer can reschedule a warehouse appointment. Someone checks the record and resolves the discrepancy. The commercial test is what the forwarder has agreed to provide, what additional work is required and whether its return justifies that work. The question is not simply who pays for the shared infrastructure. It is who sustains the participation that makes it useful. In a voluntary network, the reason to contribute must outlast the invitation to join.

TWO COSTS THAT BELONG IN ONE DECISION

The first cost is keeping the service available. The second is keeping its information useful: connecting systems, maintaining records, managing permissions and correcting errors. A business case that counts the infrastructure invoice but ignores additional work at partner companies is incomplete. Where correcting information creates recurring work, allow for the staff time, training and support it requires, including shift cover and a clear route for resolving problems where needed. Do not assume existing teams have spare capacity. Before relying on a partner's contribution, check that it has the resources to sustain the work.



The US Department of Transportation's FLOW Program is voluntary, but companies must share their own data to access the aggregated, anonymised view. Access is a return for contributing, not proof that the return exceeds each participant's costs. RISE describes the Virtual Watch Tower (VWT) as a network in which participants control their data and share shipment-relevant information with authorised parties. Control does not remove the cost of contributing.

ROTTERDAM SHOWS HOW THE BILL IS SHARED

The Port of Rotterdam's Secure Chain shows how charges can be shared. Companies digitally pass collection rights between authorised parties through an additional authorisation layer in Portbase's services. This is a container-release process, not simply a visibility dashboard.

Secure Chain guidance specifies a €0.50 contribution per container from participating shipping lines/ship agents; Portbase's published Secure Chain tariff dates the charge to 1 July 2025. Shippers and forwarders can choose free "Cargo Release Manager", or paid "Cargo Controller Import". Inland operators use "Hinterland Container Notification"; Portbase charges no additional fees for Secure Chain actions beyond that service's subscription. Charges differ across the chain, and free access does not mean participation is costless. The Secure Chain's guidance identifies separate software-vendor fees for required system connections. The limit matters.

When a shipping line releases a container through the Secure Chain, every party in that release chain must participate; an intermediate party cannot opt out while retaining the same collection process. This is a condition of collection. Voluntary networks face an additional test: their terms must keep essential contributors willing to participate. A tariff can allocate a bill; it cannot by itself secure that willingness. The lesson is not to copy the tariff, but to separate service charges from participants' work. Compulsory participation does not make that work costless. The published arrangement establishes neither who benefits most nor whether everyone earns a positive return.

WHY PAY FOR SOMETHING ALREADY PURCHASED?

A transport buyer has a legitimate objection. If timely shipment information is already part of a contract, why should it pay again? A supplier should not receive a second payment only because an agreed service is now delivered through a shared infrastructure.
Start by reading the agreement, not by designing a subsidy. Establish what information is owed, to whom, how often, and to what standard. Then identify what changes. Replacing repeated manual requests could reduce a partner's workload; new checks or reporting requirements could increase it.

A powerful buyer may require additional work without increasing the price. A supplier may accept because the wider relationship remains worthwhile. You do not need equal gains or payment for every message. But a contractual requirement does not create the capacity to fulfil it. Before relying on the information, check whether the agreed price, resources and processes support the required standard. Otherwise, procurement savings may leave essential work without the resources it needs. Paying contributors can also reward avoidable manual work, encourage unnecessary messages or give an indispensable participant leverage to demand more. Pay for a defined, useful service, not continuing inefficiency. Simplify the process before negotiating how to share its cost.
Community ownership deserves no exemption from this discipline. If a commercial provider can deliver the required service more reliably and economically, use it. If the benefit does not justify the full cost, narrow the proposal or stop.

FOUR QUESTIONS, NOT ONE

Asking who should pay risks collapsing four decisions into one price. Use the four-question framework below to review a proposed shared visibility service or an existing arrangement. For each question, make explicit the current arrangement, who is responsible, what remains unresolved and when it should be reviewed. These questions



These questions interact, but should be answered separately. Free access does not make participation costless. An operating charge does not establish whether contributors' additional work is covered. Paying more should not buy greater control. These are general principles, not a funding proposal for any named community.

1. Access: Who can use the shared service, and on what terms? Access terms should encourage the participation the service needs. FLOW illustrates access conditional on contribution; the test is whether that return justifies the work.

2. Operating costs: Who commits to funding its availability, security, maintenance and support? Members and backers must commit to funding the common service. Public support may be justified by demonstrable wider benefits. Usage charges can recover identifiable costs, but usage is not a precise measure of value. Avoid rewarding the withholding of useful updates. Where benefits are spread across companies, agree who will fund the next operating period, the minimum commitment needed and a review date before incurring costs. Name the operator and rehearse a fallback if a major backer or contributor leaves. Promised collective value is not an operating budget.

3. Contributor work: Who does the work that keeps information useful, and what makes that contribution worth sustaining? Those requesting information should agree its purpose and cost with contributors, then involve beneficiaries in supporting additional work. Options include service prices, help connecting systems, fewer duplicate requests or longer commitments.

Credits against fees offer little to a contributor with no fees to pay. The return need not be a payment for data. The publicly funded 2026 "Data Space Accelerator" study links payment for eligible companies to joining the Catena-X industrial data-sharing network, demonstrating actual data exchange and taking part in an accompanying survey. Funding entry is not the same as





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Global Supply Chain Advisor & Former Director, World Economic Forum. Wolfgang Lehmacher is a renowned expert in global supply chain and logistics.

The former director at the World Economic Forum and CEO Emeritus of GeoPost Intercontinental serves as an advisory board member of the Logistics and Supply Chain Management Society, an ambassador for FL and an advisor to RISE.

MAKE COOPERATION WORTH CONTINUING

The objective is not to turn every exchange into an invoice. It is to make useful cooperation dependable: the service needs support, and its contributors need a reason to stay. A clear bargain can protect that contribution while companies compete on price, reliability and service. Better standards may eliminate duplicate requests and repeated corrections. The best outcome is not a more elaborate way to divide the bill, but a smaller bill and stronger reasons to keep cooperating.

Funding the shared infrastructure is only the beginning. We have not secured visibility when we can see a shipment on a screen. We have secured it when the people who keep that picture reliable have a sound business reason to do so tomorrow sustaining participation. Assess each participant's contribution and return over an operating period, not message by message. Access alone may not justify the effort; include benefits such as fewer enquiries or stronger customer relationships. Under contributor work, record the required tasks, responsible party, agreed return and correction process. If an essential contribution cannot be sustained, simplify the work or change the terms before relying on it.

4. Decision rights: Who can shape the rules and direction, and how are those rights agreed? Backers should receive accounts and evidence that commitments are met. Agree who can change the rules, how decisions can be challenged and whether any special rights accompany funding. Make those rights explicit and reviewable, rather than an unspoken consequence of financial dependence.

BEFORE THE BUSINESS DEPENDS ON IT

A workable bargain still needs a useful outcome. The IMO's "Just In Time Arrival Guide" (2020) identifies contract terms that can prevent some voyage-chartered ships from adjusting speed, despite the opportunity to coordinate arrival.

Earlier knowledge alone is not a saving. Track selected alerts from checking the information to acting on it.

Compare outcomes with a credible baseline, including the costs of providing and using information. Test readiness for rare disruption through explicit scenarios, not invented avoided losses. Use existing records where possible: measuring participation should not become another burden.





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Procurement 2050
From Cost Management to Resilience Architecture

Feature Article By Vera Rozanova, Procurement and Supply Chain Consultant · Self Employed

This is the first chapter of a three-part series tracing how procurement will need to change by 2050: from the physical constraints reshaping the world, to the instability and technology disrupting it, to what this means for the function itself.

CHAPTER 1: MODERN ECONOMY. THE END OF ABUNDANCE

Introduction

For half a century, the function was trained to find the cheapest supplier. By 2050, they will have to answer different questions: Will the plant have enough water, energy, and computing power? Will it have access to critical materials? Will the supply chain withstand the next crisis? For fifty years, the procurement system operated in an economy of relative abundance, so price was the primary criterion. This model is gradually collapsing: water, energy, minerals, computing resources, and data are becoming interconnected.

A shortage of one affects the others. The world is shifting toward an economy of interconnected constraints, in which resources can no longer be optimized in isolation.
In the 20th century, the question was: “How can I get the best price?” By 2050, the question will be: “What kind of system should I build to create value regardless of what is happening in the world?”
Predictions over such a long period almost never come true 100 percent. They tend to overestimate the pace of change and underestimate how organizations themselves change. The purpose of this article is not to predict exactly what 2050 will look like, but to point out the direction for which organizations should prepare.



PART I. HOW THE WORLD WILL CHANGE

By 2050, about 68% of the world’s population will live in cities. This represents an increase of 2.2–2.5 billion people, mainly in Asia and Africa, since Europe is already a highly urbanized region. According to the Institute for Economics and Peace, by 2050, up to 1.2 billion people may be forced to relocate due to resource scarcity and vulnerability to natural disasters. The number of megacities may actually decline, and cities will cease to be merely places to live.

They will transform into a single functional unit, and the denser the population, the more closely intertwined the life-support systems will be; a local failure will bring the entire city to a standstill.
The global demographic landscape is also changing. The number of people over 60 will

reach 2.1 billion, and the population aged 80 and older will triple to nearly 426 million, leading to increased demand for healthcare and elder care. The working-age population is shrinking. According to PwC's scenarios, by mid-century, China and India will surpass the U.S. in GDP, forming new centers of production, consumption, and logistics.

PART II. THE AGE OF CONSTRAINTS

WATER

By 2050, more than 5 billion people could face water shortages for at least one month a year, compared to 3.6 billion today. As early as 2030, global demand for water could exceed sustainable supply by 40 percent. The most vulnerable regions are the Middle East, North Africa, and South Asia. Disputes over the Nile, Indus, Tigris, and Euphrates are already turning water into a matter of national security. The melting of Himalayan glaciers is currently increasing river flow, but this will eventually decline, while climate change is exacerbating the swings between droughts and floods. Desalination remains an expensive and energy- intensive solution, although it is becoming cheaper faster than was predicted 10 years ago.

Even if costs decline by 2050 thanks to cheap renewable energy, demand will grow faster. The water crisis is becoming increasingly intertwined with the energy crisis: power plants need water for cooling, and desalination requires electricity. During the 2021 drought in Taiwan, water for semiconductor production was delivered by truck, diverting it from agriculture, while the water shortage simultaneously reduced hydroelectric power generation and exacerbated power outages.

MINERALS AND RARE EARTH ELEMENTS

The transition to a low-carbon economy is driving an increase in demand for critical minerals. According to the latest IEA report (2026), under the current baseline scenario, demand for lithium will more than triple by 2040, while demand for nickel, graphite, and rare earth elements will grow by 50–90%. One possible solution is deep-sea mining: the National Oceanic and Atmospheric Administration (NOAA) has already approved an application to explore the Clarion-Clipperton Zone in the Pacific Ocean, where the developer estimates there are about one billion metric tons of polymetallic nodules. However, the main risk lies not in mining: China controls approximately 85–90% of the world's rare earth processing capacity and about 90% of rare-earth magnet production. Local production is developing in Australia, the U.S., and the EU, but building plants of this scale takes years, and dependence on China will persist for the foreseeable future. Competition among countries is shifting from a struggle for deposits to a struggle for control over processing and logistics.

ENERGY

Global demand for electricity will grow by an average of 3.6% per year between 2026 and 2030, which is 50% faster than in the past decade. Electric vehicles, air conditioning, and industry are the main contributors, but computing is the fastest-growing sector. Global energy consumption by data centers will double by 2030, reaching about 945 TWh.

Power generation is growing, but grids and power plants are being built more slowly than necessary. Ultimately, the constraints on AI development will shift from model design to



energy and infrastructure, even though the efficiency of chips and algorithms is increasing very rapidly, and historically, the energy consumption of computations per operation has been falling exponentially. Regions with cold climates and cheap energy have an advantage when it comes to hosting digital infrastructure.

China is relocating data centers to Inner Mongolia; US interest in Alaska is growing; Russia already has seven data centers in the north; and Iceland is the region's largest player thanks to geothermal energy. The Scandinavian countries are "exporting" cheap energy packaged as computing services, while Greenland and Canada are just beginning to follow this path.

THE END OF CHEAP RESOURCES

Humanity is consuming renewable resources faster than the planet can replenish them. According to WEF estimates, approximately $44 trillion of the global economy—more than half of global GDP—depends on ecosystem services. The consequences are already affecting supply chains: countries are restricting exports of food and fertilizers, sand shortages are leading to bans and illegal mining, and droughts are disrupting logistics. In 2022, ships on the Rhine were operating at a quarter of their usual capacity due to drought, and in 2023, the Panama Canal reduced the number of ship transits by nearly a third.

The response is twofold. 1) Adaptation: restructuring logistics routes and investing in climate risk forecasting. 2) Technology: synthetic biology and algorithmic materials design are seeking alternatives to scarce raw materials. There is also an opposing viewpoint.

Historically, it is price signals of scarcity that drive innovation. It is possibly that increased efficiency will reduce the economy's material consumption faster than demand grows. In this case, resource scarcity will diminish over time rather than intensify. Deep-sea mining, recycling, synthetic alternatives, and orbital resources could radically change the landscape. Continued Next Month in Part 2: "Instability, Intelligence, and the New Architecture of Production."





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Vera Rozanova, MEng (Hons), MBA, FCIPS Chartered, FCILT, is an international Procurement and Supply Chain Executive with more than 20 years of experience across FMCG, tobacco, food, education, and manufacturing. She has held four Chief Procurement Officer/Procurement Director roles, leading transformation, digital procurement, supplier collaboration, and sustainability initiatives across 18 countries.

Vera is an international speaker, lecturer, and thought leader on procurement, AI, supply chain resilience, and ESG. She is passionate about helping organizations transform procurement from a cost function into a strategic driver of innovation, resilience, and business value.

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THE INTRALOGISTICS CORNER

OP-ED BY Mike Nissen Senior Commercial Director, APAC, Hannover Fairs Australia/Asia-Pacific

The Warehouse That Thinks Ahead

A PROMISE KEPT

Welcome back to The Intralogistics Corner. Last month I argued that the warehouse has quietly become the incubator where the world's AI and robotics grow up — and I signed off with a promise: that the next real battle in our industry will be fought not between competing robots, but in the software layer that tells them all what to do. This month, let's keep that promise. Start with a scene every operations manager will recognise. It's two o'clock in the afternoon. The wave of e-commerce orders that dropped at lunchtime is rolling through picking, and everyone on the floor can already see what's coming: packing station four will drown at about three-fifteen, the outbound sorter will back up behind it, and the six o'clock carrier cut-off will arrive with pallets still waiting.

Nobody is surprised. Everybody saw it coming. And yet, in most facilities on the planet, nothing in the building was capable of preventing it — because the software running the operation can only see the present, not the future. That is the gap now closing, and it changes what a warehouse fundamentally is.



The end of the hard-coded warehouse

For thirty years, we have built warehouses the way we build clocks. Engineers studied the operation, encoded its logic into rules — release orders in waves, pick zone A before zone B, escalate exceptions to a supervisor — and the system executed those rules faithfully, forever, whether or not they still made sense. The intelligence lived in the people who wrote the rules.

Change the flow, and you needed a change request, a test window and a nervous weekend cutover. The warehouse now emerging is a different machine. Its software watches its own flow, learns what normal looks like, predicts where the next constraint will form, and adjusts re-sequencing work, re-routing orders, re-balancing labour — while the shift is still running.

"Flexible flow" stops being a layout concept, something you achieve with conveyor spurs and spare dock doors, and becomes a property of the software itself. The rules are no longer carved in stone; they are continuously rewritten by the system that executes them. That is a bigger shift than any single piece of hardware on any show floor, because it changes where the value sits. Two facilities can buy identical robots and identical racking. The one whose software thinks ahead will outperform the one whose software merely keeps score.

FROM SYSTEM OF RECORD TO SYSTEM OF ANTICIPATION

You can watch this evolution happening layer by layer. The warehouse management system was built as a system of record: it knew where the stock was and what the orders were, and it was interrogated by humans who did the actual thinking. The warehouse execution systems now arriving are becoming systems of anticipation.

The better ones run time-phased projections of the shift ahead — simulating how today's order pool will flow through picking, packing and sortation hour by hour, and flagging that packing station four will be underwater at three-fifteen while there is still time to move people or meter the release of work. Continuous, intelligent order release is replacing the old rigid waves; instead of dropping work onto the floor in big indigestible batches, the system feeds it through at the rate the downstream processes can actually swallow. And around all of this sits the digital twin — the rehearsal room. Operators can now run tomorrow's forecast, next month's peak or a proposed new layout through a software replica of the site and watch where it breaks, before a single roster is changed or a single dollar is spent on steel. The AMR fleets I wrote about last month are part of the same story: the orchestration software coordinating them is already recalculating hundreds of routes in real time and learning from yesterday's congestion. The thinking that used to happen in a planner's head the night before is migrating into the building itself, and it is happening continuously.

DETECT, DECIDE, ACT

The newest layer goes a step further — from predicting problems to quietly fixing them. The industry has borrowed a term from the AI world for this: agentic systems. Where a traditional WMS raises an alert and waits for a human, an agentic system detects the exception, decides on a response, and acts on it within the boundaries it has been given. A concrete example doing the rounds this year: a vision system on an inbound line spots a damaged carton. In the old world, that's a photo, an alert, and a supervisor's afternoon. In the agentic version, the software creates the damage case, routes the carton to a quality-control station, assigns the inspection task, adjusts the put-away plan and notifies the supplier's portal — before the supervisor has finished their coffee.

Add to this the natural-language interface: instead of navigating seven menus, a shift leader asks the system, in plain words, why zone C is running slow, and gets an answer, plus a proposed fix. None of this is science fiction; versions of it were on show floors this year. But — and this is the part the brochures skip — the distance between a slick demonstration and a system you would trust with your carrier cut-offs remains considerable.



My honest read: autonomy is earned, not installed Here is what I notice when I talk to the operators actually living with these systems rather than the vendors selling them. Nobody hands an algorithm the keys on day one — and nobody should. Every credible deployment I have seen follows the same arc: the system starts in recommendation mode, proposing moves that a human approves or overrules; trust accumulates decision by decision; and only then, domain by domain, is the software allowed to act on its own.

Autonomy is earned in production, not installed from a box. I would also caution that “predictive” is currently the most elastic word in the industry's vocabulary. Some platforms genuinely simulate the hours ahead; others have relabelled last year's dashboard. The difference reveals itself in one question every buyer should ask: show me a prediction your system made, the action it took, and what happened next. A vendor who can answer with logged examples is selling software. A vendor who answers with a roadmap is selling hope. And the unglamorous truth underneath all of it hasn't changed since last month's column: these systems are only ever as good as the data they ingest. A warehouse that cannot trust its own stock accuracy has no business asking software to predict its future. Fix the foundations first.

WHAT THIS MEANS FOR YOU

If you are running an operation, the practical playbook writes itself. Start by measuring how much of your day is spent reacting to problems your team saw coming — that is the size of your prize. Insist on prescriptive before autonomous: a system that recommends well is valuable on its own, and it is how your people learn to trust the next step. Keep humans on the exceptions that deserve judgement, and let the software absorb the ones that don't. And treat your data accuracy as the entry ticket, because it is. If you build or integrate these systems, one plea from the show floor: publish your prediction accuracy the way hardware vendors publish throughput. The operator who can verify your claims will become your best salesperson.

UNTIL NEXT ISSUE

Next month I want to take this conversation somewhere less shiny and more real: brownfield sites — the ageing, awkward, fully depreciated buildings where most of this region's freight actually moves — and the economics of automating them without knocking them down.
Until then, keep an eye on packing station four. Somewhere in your building, the three-fifteen bottleneck is already forming. The only question is whether your software knows it yet.



Mike Nissen

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Mike Nissen is Senior Commercial Director APAC at Hannover Fairs Australia/ Asia-Pacific. He has spent more than three decades in and around the exhibitions business and the industries it serves, particularly Intralogistics and the Supply Chain. Today, the key focus of this role is intralogistics and industrial transformation, leading the commercial side of CeMAT AUSTRALIA in Australia and Southeast Asia New Zealand, and on the Global Business Development group for Deutsche Messe.

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From Manual Tasks to Data-Driven Decisions: The Changing Role of the Warehouse Teams

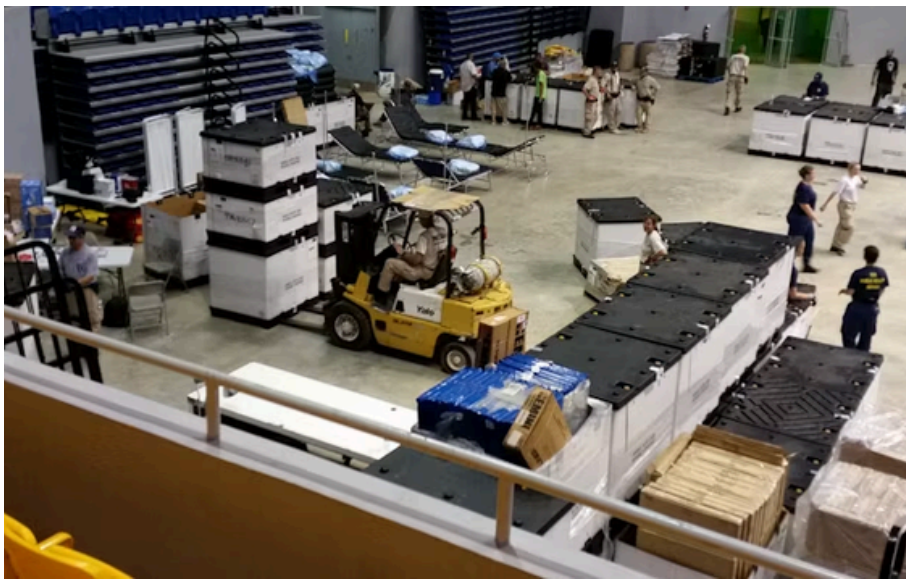
Feature Article By Oana Jinga, Co-Founder, & Chief Commercial & Product Officer at Dexory

Warehouse teams are evolving. As robotics, artificial intelligence and real-time data become more embedded in logistics operations, team members are moving away from repetitive manual tasks and towards interpreting information, resolving exceptions and making operational decisions.

Automation is changing how their expertise is used. Employees who once spent hours checking inventory, searching for misplaced goods or investigating discrepancies can now access more accurate, timely information about warehouse operations. This shift has important implications for both warehouse teams and the leaders responsible for developing and retaining them.

HOW WAREHOUSE ROLES ARE EVOLVING

Inventory management provides a clear example. Traditional inventory checks require employees to walk aisles, scan locations and investigate whether goods are where the warehouse management system says they should be. These processes are time-consuming and offer only a snapshot of inventory. Autonomous robots equipped with sensors and imaging technology can move continuously through warehouse aisles, capturing inventory data without requiring employees to perform repetitive checks.



Combined with analytics, this enables teams to identify discrepancies and exceptions more quickly. The employee remains central to the process, but their expertise is applied differently. Instead of spending hours finding a problem, they can focus on understanding why it occurred and deciding what to do next. This ability to turn operational data into action will be a defining skill in the future warehouse.

FROM PHYSICAL PROCESSES TO DATA-DRIVEN DECISIONS

Warehouses have always generated significant amounts of information, but robotics, AI and real-time data capture are increasing both the volume of data available and the speed at which it can be

used. Managers can use this information to identify recurring inventory discrepancies, improve storage utilisation and spot patterns that contribute to congestion. Rather than relying mainly on periodic reports or manual observation, they can make decisions based on a continuously updated view of the operation. Employees do not need to become data scientists, but data literacy is becoming increasingly valuable. Understanding an exception, investigating its cause and determining the appropriate response will matter more as automation takes responsibility for repetitive data-gathering activities.

HUMAN EXPERTISE REMAINS CRITICAL

Automation does not diminish the importance of human knowledge. Technology can identify that something is wrong, but human experience is often essential to understanding why. An experienced employee may recognise that repeated discrepancies are linked to a particular process, storage area or workflow. A manager can then assess the wider implications and determine how operations should change.

This is where people and technology work most effectively together. Robots perform repetitive activities consistently and at scale, while AI and analytics process the information they collect. People apply context, judgement and operational experience to turn those insights into action. The future warehouse is therefore not a choice between people and machines. It will be defined by how effectively they work together.

PREPARING PEOPLE FOR AN AUTOMATED WAREHOUSE

For logistics leaders, this evolution creates a responsibility to manage more than the technology implementation. Organisations must consider how roles will change, which skills employees will need and how teams will be supported throughout the transition. Training should cover not only how new systems operate, but how employees can use the information those systems generate. Clear communication is equally important.

When people understand why automation is being introduced and how it can remove repetitive work or improve decision-making, collaboration between employees and technology is more likely to succeed. As warehouse roles become more focused on technology, analytics and problem-solving, employers can also create new pathways for career development. This could help logistics businesses attract and retain talent by making warehouse work more skilled, engaging and rewarding.

LEADERSHIP SHAPES THE OUTCOME

The future warehouse manager will increasingly coordinate people, autonomous systems, warehouse software and real-time data. That requires more than technical knowledge. Leaders must identify where automation can add value, determine where human judgement remains essential and ensure employees have the confidence and skills to work effectively alongside new systems. The organisations that benefit most from automation will not necessarily be those that deploy the most technology.

They will be those that use it to amplify the capabilities of their people. As robotics and AI develop, some manual activities will disappear or change, while new responsibilities will emerge around data, exception management, optimisation and decision- making.



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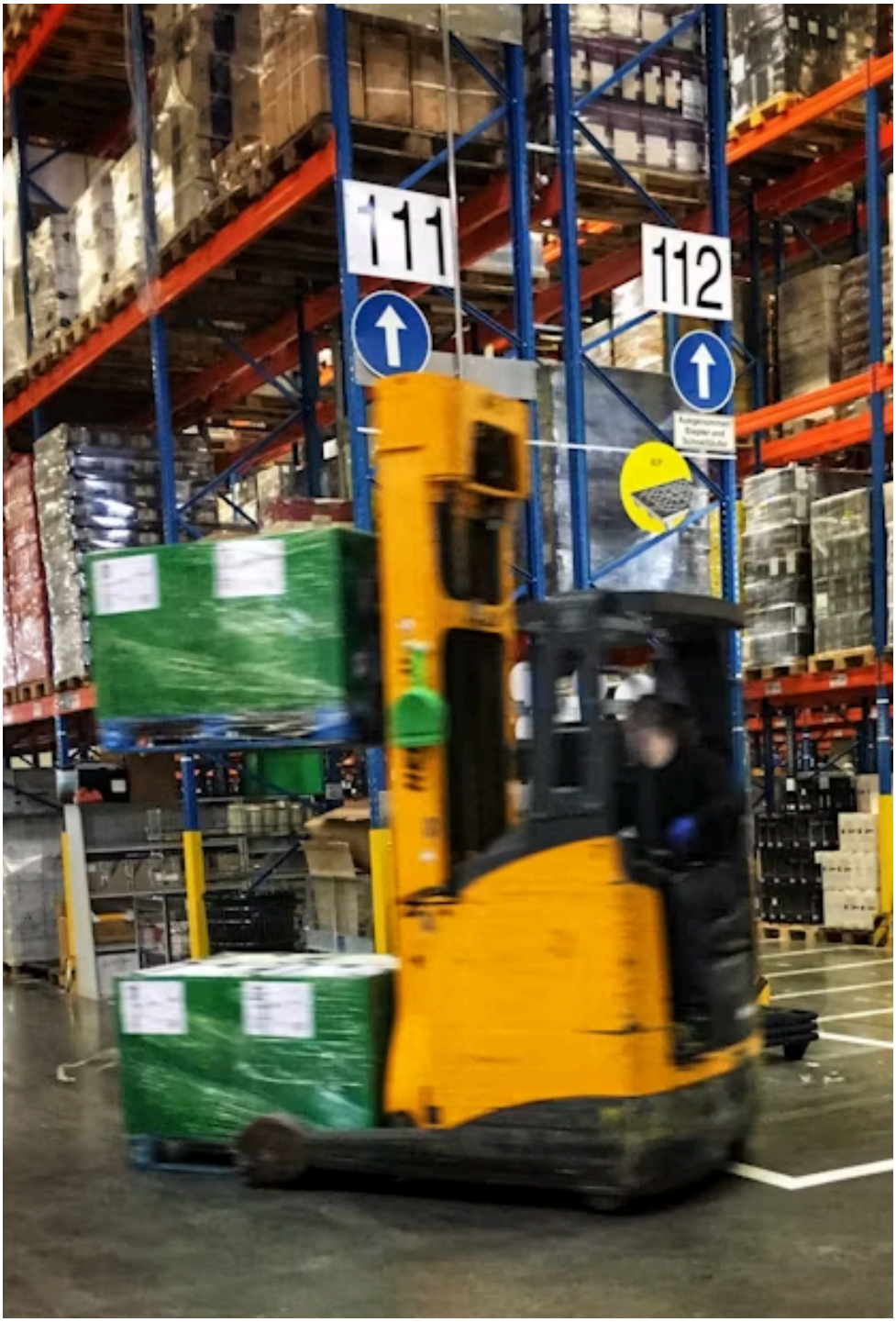
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Oana Jinga

Co-Founder & Chief Commercial & Product Officer

Dexory

Oana Jinga is CC&PO and co-founder of Dexory, a warehouse intelligence company transforming warehouse operations through its autonomous robotics and AI-powered digital twin platform, DexoryView. With a background in leading strategic partnerships at Google and developing innovative products at Telefonica, her career touched on various areas of the tech world, having found a sweet spot in designing, developing and bringing robots to the logistics industry to drive significant business value across all warehouse processes.

She is very passionate about educating the world on the benefits and ethics of robotics as well as the importance of building unbiased AI.

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Vietnam

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