



alice

Alliance for Logistics  
Innovation through  
Collaboration in Europe

## Logistics Innovation Summit

Freight transport and logistics innovation  
for a competitive Europe

Tangla Hotel, Brussels  
23-24 October 2025

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# 2025 Report

# INTRODUCTION

Europe is navigating a decisive moment. The twin transition (green and digital) are redefining how goods are transported, how networks are managed, and how supply chains remain competitive. A fragmented approach is no longer sufficient. The Logistics Innovation Summit highlights the importance of adopting an integrated, system-wide approach to ensure logistics continues to support a robust internal market and Europe's global competitiveness.

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# Logistics as a driver for competitiveness

Logistics is a fundamental pillar of European competitiveness, enabling the movement of goods, supporting industrial productivity, connecting markets and ensuring societal well-being. As Europe navigates the green and digital transitions, logistics is becoming an increasingly strategic asset for achieving economic growth, resilience and sustainability simultaneously.



The opening plenary of the [ALICE Logistics Innovation Summit 2025](#) explored how logistics can strengthen Europe's competitiveness in a rapidly changing global environment. Moderated by **Fernando Liesa**, Secretary General of ALICE, the session brought together **Annika Krohn** (European Commission DG MOVE), **Andrea Gentili** (European Commission DG RTD), **Paolo Giacobbe** (Contract Logistics Observatory, Politecnico di Milano) and **Sergio Barbarino** (Former ALICE Chair and Procter & Gamble Research Fellow) to discuss the policy frameworks, market trends and innovation pathways shaping the future of logistics.

A key message throughout the session was that Europe has entered a new implementation phase. **Annika Krohn** highlighted how the [European Green Deal](#) and the previous European Commission mandate have delivered an unprecedented package of legislative initiatives aimed at accelerating decarbonisation while strengthening competitiveness. Measures included within the [Fit for 55 package](#), the Greening Freight Transport Package, [CountEmissionsEU](#), [FuelEU Maritime](#) and the [Electronic Freight Transport Information \(eFTI\) Regulation](#) are now adopted or close to adoption and will significantly reshape the logistics landscape in the coming years.

Particular attention was given to the Greening Freight Package, which aims to improve freight transport efficiency while reducing environmental impacts. The package includes initiatives on railway capacity management, incentives for zero-emission road freight vehicles, multimodal transport and CountEmissionsEU, which provides a common methodology for calculating greenhouse gas emissions from freight transport operations. These developments are closely linked to ongoing European efforts to harmonise emissions measurement and reporting across logistics chains, including activities supported by the [CLEVER project](#).

Beyond creating new compliance requirements, these initiatives provide opportunities for logistics stakeholders to improve efficiency, embrace digitalisation and accelerate the transition towards low-emission operations. Krohn emphasised that organisations capable of adapting to this evolving policy environment will be better positioned to compete in the future logistics market. ALICE was highlighted as a key actor in helping stakeholders understand, anticipate and benefit from these developments by connecting innovation, regulation and deployment activities.



**Andrea Gentili** focused on the priorities of the new European Commission mandate, where competitiveness has become a central policy objective. Through initiatives such as the Competitiveness Compass and the Clean Industrial Deal, Europe seeks to ensure that industrial leadership, innovation and decarbonisation reinforce one another. He stressed that bridging the innovation gap will be critical to maintaining Europe's global position, requiring not only research excellence but also effective deployment and scaling of innovative solutions. Large-scale demonstrations, cross-sector collaboration and deployment-oriented research programmes will play an important role in accelerating the uptake of zero-emission transport technologies, automation and digital logistics solutions.

This perspective closely aligns with ALICE's long-standing advocacy on moving beyond Technology Readiness Levels (TRLs) and focusing on pathways to impact. Innovation success increasingly depends on business readiness, market adoption, regulation, standardisation and collaboration between stakeholders, rather than technology development alone.



Providing the market perspective, **Paolo Giacobbe** presented insights from the Contract Logistics Observatory of Politecnico di Milano. He highlighted that logistics remains one of the key enablers of economic growth and competitiveness, yet often lacks visibility due to the sector's fragmentation and complexity. At the same time, logistics companies are facing an increasingly challenging environment shaped by digitalisation, automation, sustainability requirements, demographic shifts and

geopolitical uncertainty. To help stakeholders better understand these transformations, ALICE and Politecnico di Milano announced plans to develop a European Logistics Market and Innovation Observatory, providing market intelligence and evidence-based insights to support strategic decision-making across Europe.

Closing the plenary, **Sergio Barbarino** invited participants to view logistics not as a support function but as a strategic business capability. Drawing on his experience at Procter & Gamble, he demonstrated how logistics and transportation have become essential drivers of competitiveness, resilience and sustainability. He shared examples of how research and innovation projects have influenced operational practices within P&G and highlighted the role of collaboration, standardisation and system-wide approaches in accelerating logistics transformation.

**Barbarino** also reflected on the impact of ALICE's work over the past decade. He noted that the ALICE roadmap on freight transport and logistics decarbonisation helped shape P&G's own transport decarbonisation strategy and highlighted the contribution of ALICE and collaborative European initiatives to the development of harmonised carbon accounting methodologies. These efforts contributed to the emergence of common frameworks for emissions measurement and reporting that are now supporting decarbonisation efforts across the logistics sector.



Across all interventions, a common conclusion emerged: Europe's competitiveness will increasingly depend on its ability to combine sustainability, digitalisation, innovation and collaboration into a coherent logistics transformation strategy. While significant policy frameworks and technological solutions are already available, the next challenge is implementation. Bridging the gap between innovation and large-scale adoption will be essential to ensuring that logistics continues to support Europe's economic prosperity, industrial leadership and climate ambitions.

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# Physical Internet and standardisation Global Forum

The [Physical Internet \(PI\)](#) is gaining momentum worldwide, with Asia advancing rapidly in innovation, implementation, and standardisation. The plenary session “*Physical Internet and Standardisation – Global Forum*” at the [ALICE Logistics Innovation Summit 2025](#) explored how regions across the world are shaping PI development, and why global, coordinated standardisation has become the critical enabler for a future interoperable logistics system.



Hosted by **Eric Ballot** (MINES Paris), the session gathered international leaders in PI standardisation and development: **Bruno Gadai** (Geopost), **Jongkyoung Kim** (Korea Conformity Laboratories / ISO TC344), Professor **Takayuki Mori** (Japan PI Centre), and **Fernando Liesa** (ALICE). Together, they examined 20+ years of global work on PI, emerging ISO structures, and the need for common, internationally aligned standards.

**Bruno Gadai** (Geopost) opened the session by highlighting the strategic breadth of logistics standardisation – covering terminology, identifiers, event models, shipment formats, physical interfaces, packaging, service levels, and environmental reporting. He warned that Asia, through ISO/TC 344 and ISO/TC 315, is progressing far more quickly than Europe. With limited European participation and inactive CEN committees, Europe risks adopting foreign standards instead of shaping them. He stressed that European research must be systematically converted into CEN–ISO contributions to ensure strategic autonomy in the future Physical Internet.



**Dr. Jongkyoung Kim** (ISO TC344) presented a structured, five-layer global roadmap for PI implementation: shared interoperability foundations, standardized PI containers, harmonized PI nodes, interoperable data/platform architectures, and coordinated routing and network management. He insisted that none of these layers work without shared terminology, process standards, and data models. He also stressed that global convergence – particularly EU-Japan-Korea alignment – is essential to prevent fragmented regional PI systems, noting that standardisation cycles take years and must accelerate now.

**Professor Takayuki Mori** (Japan Physical Internet Centre) introduced the PI Maturity Model (PIMM), a practical framework for companies to assess their PI-readiness. Built around four pillars – asset sharing, process synchronization, data utilisation, and ecosystem formation – the model provides measurable criteria for investment and progress tracking. Mori positioned PIMM as the missing link between PI roadmaps and real implementation, with pilots planned for 2025-2026. He explicitly invited ALICE to co-develop the model and push it toward CEN-ISO standardisation.



**Fernando Liesa** (ALICE) emphasised that standardisation is the bridge between research and real-world adoption. Europe has strong R&I outputs, multimodal pilots, governance frameworks, resilience models, harmonisation tools, but these remain unscalable unless transformed into interoperable, standardisation-ready specifications. He stressed that logistics nodes, orchestration frameworks, digital twins, and data-space connectivity are immediate areas where convergence is needed. Europe can lead PI deployment, he argued, if it channels project results into CEN-ISO structures and strengthens cooperation with Japan and Korea.

All speakers agreed that the Physical Internet cannot scale without global standardisation. Shared terminology, data models, container specifications, node interfaces, and governance frameworks are indispensable. Asia's rapid progress in ISO means Europe must act decisively to remain competitive, accelerate its standardisation processes, and convert R&I outputs into globally relevant standards.

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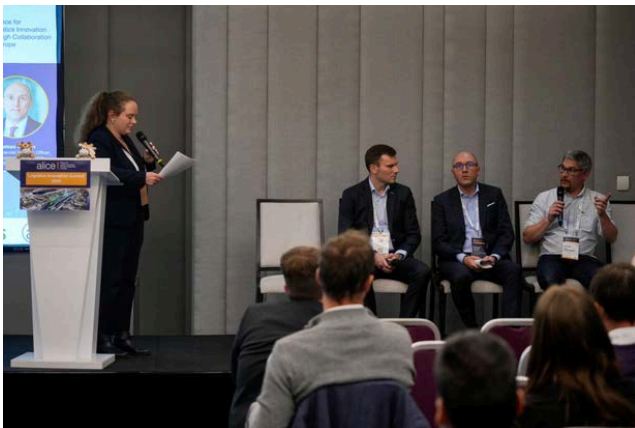


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# Beyond diesel:

## How transport companies are powering the green shift?

Electrification is redefining Europe's long-haul logistics. The session "Beyond Diesel: How Transport Companies Are Powering the Green Shift" at the [ALICE Logistics Innovation Summit 2025](#) explored how transport operators and manufacturers are putting zero-emission freight into practice – and what systemic changes are needed to make it scalable.



Hosted by **Stefanie Van Damme**, ALICE Deputy Programme Manager for Efficient and Low-Emission Assets and Energy and **ZEFES Project Manager**, the session gathered frontrunners from across the logistics value chain: **Andrea Condotta** (Gruber Logistics), **Mads Rasmussen** (DFDS), **Thomas Fabian** (ACEA), and **Pascal Van Wallendael** (Colruyt Group). It was linked to six EU-funded projects driving this transformation: [CLEVER](#), [ESCALATE](#), [FLEXMCS](#), [NextETRUCK](#), [MACBETH](#), and [ZEFES](#).

**Andrea Condotta** (Gruber Logistics) opened the discussion with a reality check: while electrification is the only scalable path toward decarbonising long-haul freight, economic and social sustainability still lag behind environmental ambition. The Total Cost of Ownership (TCO) of electric trucks remains uncompetitive in most use cases, but systemic innovation – supported by initiatives such as the Clean Transport Corridor Initiative – can make the transition viable. Condotta underlined that zero-emission logistics will only succeed through coordinated efforts across the entire supply chain and proactive engagement by logistics companies and shippers.

**Mads Rasmussen** (DFDS) shared insights from operating 146 electric heavy-duty trucks across Europe. He described how the shift to battery-electric vehicles transforms network design, adding parameters such as energy efficiency, resilience, and biodiversity alongside traditional cost and performance metrics. Rasmussen called for faster solutions to long lead times for vehicles and grid connections, and policies that close the cost gap between diesel and clean energy sources.



**Thomas Fabian** (ACEA) provided a data-driven overview of the market. In mid-2025, only **1.5% of new heavy-duty trucks** sold in Europe were electric, compared to **14.8% of medium-duty vehicles**.

To meet the 2030 CO<sub>2</sub> reduction target, at least **400,000 electric trucks**, **50,000 public chargers**, and **2,000 hydrogen stations** are needed – requiring the installation of about **500 HDV chargers per month**. Fabian stressed that infrastructure deployment, policy alignment, and grid transparency are essential to accelerate progress.



In the panel discussion, **Pascal Van Wallendael** (Colruyt Group) shared the retailer’s practical experience in electrifying its fleet. Colruyt is deploying both **battery-electric (BE-HDV)** and **fuel-cell (FCE-HDV)** trucks, while installing charging infrastructure at its hubs to support suppliers and lower Scope 3 emissions. The group is also launching bundled procurement programmes to help outbound transport partners access zero-emission trucks at competitive rates. Van Wallendael emphasised that optimised planning of deliveries and charging will be crucial to scale efficiently.



All speakers agreed that electrification is advancing – but not fast enough. Long lead times, high costs, and fragmented permitting continue to slow deployment. Achieving the **45% emission reduction target by 2030** will require a **holistic approach**, addressing vehicles, infrastructure, logistics processes, and supportive regulation in parallel.

Projects such as **ZEFES**, **FLEXMCS**, and **MACBETH** are already demonstrating solutions: real-life long-haul use cases, multi-point megawatt charging systems, and new interoperability models that connect fleets and grids. Meanwhile, **CLEVER**, helps advancing emission accounting, and **ESCALATE**, and **NextETRUCK** are work on vehicle innovation, and new operational models to make electrified logistics both feasible and competitive.

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# From regulation to implementation: eFTI, Data Spaces, and European Digital Infrastructure Consortium

Europe's freight transport sector is entering a new phase of digital transformation. The session "*From regulation to implementation and adoption: eFTI, Data Spaces and European Digital Infrastructure Consortium (EDIC)*" at the [ALICE Logistics Innovation Summit 2025](#) explored how stakeholders can move from regulatory frameworks to practical implementation, unlocking the benefits of digital freight information exchange across Europe.



Hosted by **Tomasz Dowgielewicz**, ALICE Data Exchange, DTLF & eFTI Community Manager, the session brought together representatives from the European Commission, Open Logistics Foundation, the Dutch Ministry of Infrastructure and Water Management, and Transporeon. The discussion also connected to several European initiatives and projects, including [ACUMEN](#), [DELPHI](#), [DISCO](#), [SEAMLESS](#), [ReMuNet](#), [SARIL](#) and [IKIGAI](#), which are helping advance data sharing, interoperability and digital logistics services across Europe.

Opening the session, **Tomasz Dowgielewicz** highlighted the growing interest in eFTI, Data Spaces and EDIC, emphasising the need to turn policy ambitions into practical deployment. He outlined ALICE's ongoing role in supporting implementation through collaboration with the Digital Transport and Logistics Forum (DTLF), guidance activities and stakeholder engagement.



**Villu Varjas** from the European Commission's DG MOVE provided an update on the Electronic Freight Transport Information (eFTI) Regulation and its implementation timeline. He explained that eFTI establishes a harmonised framework for the electronic exchange of freight transport information between businesses and authorities, with full application scheduled for July 2027. He also presented recent developments, including platform requirements, certification

The relationship between eFTI and the electronic consignment note (eCMR) was explored by **Thorsten Hülsmann**, Managing Director of the Open Logistics Foundation. He demonstrated how open-source eCMR components can serve as a practical building block for eFTI implementation, enabling companies to exchange

standardised transport data while avoiding vendor lock-in. His key message was that eCMR and eFTI are not competing solutions but complementary layers of the same digital infrastructure: eCMR supporting business-to-business processes and eFTI enabling business-to-authority information exchange.



**Jon Kuiper** from the Dutch Ministry of Infrastructure and Water Management then addressed the role of Data Spaces and the emerging European Digital Infrastructure Consortium (EDIC). He highlighted the importance of federated data sharing, where organisations maintain control over their data while enabling trusted and interoperable exchange. Through initiatives such as BoostEDIC, European stakeholders are working to develop cross-border use cases that demonstrate how Data Spaces can support logistics services, interoperability and the European Mobility Data Space.

Providing the business perspective, **Gerry Daalhuisen** from Transporeon argued that eFTI should be viewed as a business transformation rather than a compliance exercise. Digital freight information can reduce administrative costs, accelerate transport operations and improve visibility across supply chains. He encouraged organisations to start preparing now by assessing system integration needs, evaluating partner readiness and investing in digital skills rather than waiting for the 2027 deadline. These developments also support the broader Physical Internet vision by enabling more standardised, interoperable and real-time information flows between logistics actors, transport modes and digital systems.

Across all presentations, a common message emerged: Europe is moving from regulatory preparation towards implementation of digital freight information exchange. eFTI provides the regulatory layer for business-to-authority exchange, eCMR supports business-to-business document digitalisation, while Data Spaces and EDIC initiatives address the infrastructure and governance layer for trusted cross-border data sharing. The main challenge now is to align these layers through interoperable data models, clear governance principles and practical adoption by industry. These developments also support the broader Physical Internet vision by enabling more standardised, interoperable and real-time information flows between logistics actors, transport modes and digital systems.



The session concluded with a call to action for logistics stakeholders to engage in pilots, strengthen interoperability efforts and actively contribute to shaping Europe's future digital logistics ecosystem. Through ALICE activities, cross-border projects and initiatives such as **ACUMEN**, **DELPHI**, **DISCO**, **SEAMLESS**, **ReMuNet**, **SARIL** and **IKIGAI**, the logistics community is already building the foundations for a more connected, efficient and data-driven transport system.

The discussion highlighted the importance of continued collaboration between policymakers, technology providers, logistics operators and research organisations as Europe prepares for the next phase of digital freight transport implementation. Stakeholders will have an opportunity to continue these discussions and share progress on eFTI, Data Spaces, EDIC and related initiatives at the **ALICE Logistics Innovation Summit 2026**, taking place on **17-18 November 2026 in Brussels**. The Summit will showcase ALICE's progress and achievements, outline priorities for the coming year, and provide opportunities for engagement with policymakers, regulators, industry leaders and the research community.

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# EC Expert Group on Urban Mobility recommendations in motion:

## One year of progress in shaping Urban Logistics

One year after the publication of the Expert Group on Urban Mobility (EGUM) Recommendations on Urban Logistics, European cities are increasingly moving from policy recommendations to practical implementation. The session “*From EGUM recommendations to practice: One year of progress in shaping urban logistics*” at the ALICE Logistics Innovation Summit 2025 examined how guidance on Sustainable Urban Logistics Plans (SULPs), data sharing and innovation deployment is helping cities integrate freight transport into broader urban mobility strategies.



Hosted by **Yanying Li**, Head of Programmes and Knowledge Management at ALICE, the session brought together Paola Chiarini ([European Commission DG MOVE](#)), Eleonora Ghetti ([Shift2Zero](#)), Bartosz Kożuch ([GreenTurn](#)), Ivo Cre ([POLIS](#)) and Hans Schurmans ([PROXIMUS](#)). The discussion was also linked to several European projects supporting urban logistics innovation, including [DECARBOMILE](#), [URBANE](#), [LogE-Hubs](#), [UNCHAIN](#) and [Shift2Zero](#).

Opening the session, **Paola Chiarini** presented recent progress in implementing the [EGUM recommendations](#) and highlighted the growing importance of urban logistics within European transport policy. She explained that freight transport is now firmly embedded within the EU Urban Mobility Framework and the revised TEN-T Regulation, requiring 431 urban nodes to integrate freight considerations into [Sustainable Urban Mobility Plans \(SUMPs\)](#) by 2027.

Chiarini also outlined several supporting measures, including the establishment of National SUMP Contact Points, the revision of SUMP Guidelines to strengthen freight planning and the inclusion of urban logistics within the future European Mobility Data Space. Together, these developments demonstrate how urban logistics is becoming an integral component of sustainable urban mobility rather than a standalone policy area.

The session then explored how European research and innovation projects are translating these policy ambitions into practical solutions.

**Eleonora Ghetti** presented the **Shift2Zero project**, which is developing adaptable zero-emission vehicles and modular logistics systems for urban freight transport. Through demonstrations in Bologna, Brussels, Thessaloniki, Wrocław and Bergen/Oslo, the project is testing electric light commercial vehicles equipped with modular cargo systems and innovative concepts such as the SwapBox system, which enables efficient transfers between larger and smaller vehicles at low-emission zone boundaries. The project also explores technologies including geofencing, thermal management and advanced energy control systems to improve operational performance.



Complementing the technological perspective, **Bartosz Kożuch** introduced the **GreenTurn project**, which focuses on consumer behaviour and sustainable e-commerce logistics. Research carried out in Athens, Lyon, Poznań, Vienna and Zaragoza revealed that while most consumers continue to prefer home delivery, a significant proportion would be willing to switch to greener delivery options if they are visible, convenient and cost-neutral. The project is also examining how behavioural incentives, communication strategies and data-driven approaches can support more sustainable delivery choices and reduce the environmental impacts associated with returns.



Together, the two projects demonstrated how the core pillars of the EGUM recommendations are being implemented in practice: integrated planning through SULPs, data-driven decision-making and innovation deployment through real-world pilots.

The panel discussion shifted attention towards the challenges of long-term implementation. **Ivo Cre** highlighted that many cities have embraced the principles promoted by EGUM but continue to face challenges related to cross-departmental coordination, governance and funding continuity. **Hans Schurmans** provided the private-sector perspective, explaining that businesses are investing in electrification and digital solutions but often face regulatory fragmentation and insufficient infrastructure. He stressed the importance of harmonised standards and predictable regulatory frameworks to support investment decisions.



Throughout the discussion, data governance emerged as a critical enabler of progress. Speakers agreed that trusted and standardised data-sharing frameworks are essential for collaboration between public authorities and private stakeholders. They also emphasised the need for cultural change, arguing that logistics should be treated as a mainstream urban planning priority alongside public transport, cycling and other mobility services.

A clear message emerged from the session: Europe has moved beyond recommendations and entered a phase of institutionalisation, where urban logistics is increasingly embedded in planning frameworks, policy instruments and innovation programmes. The next challenge is scaling successful solutions, strengthening collaboration and ensuring that cities, businesses and citizens work together towards zero-emission urban logistics.

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# The backbone of the transition: Powering corridors for zero-emission truck

Corridor-based electrification is emerging as the backbone of Europe's transition to zero-emission road freight. The [ALICE Logistics Innovation Summit 2025](#) session “*The Backbone of the Transition: Powering Corridors for Zero-Emission Trucks*” explored how grid operators, charging providers, and logistics innovators can align to deploy megawatt-scale charging infrastructure across Europe's main transport routes.



Hosted by **Alice Scotti**, ALICE Project Manager, the session featured participation from **Koen Noyens** (Milence), **Janez Humar** (ELES), and **Marie Knutsen-Oy** (Einride), and was linked to five EU-funded projects: [FLEXMCS](#), [MACBETH](#), [ESCALATE](#), [NextETRUCK](#), and [ZEFES](#). Together, they illustrated how Europe can move from pilot deployments to a fully connected, interoperable charging network for heavy-duty battery-electric vehicles (HD-BEVs).

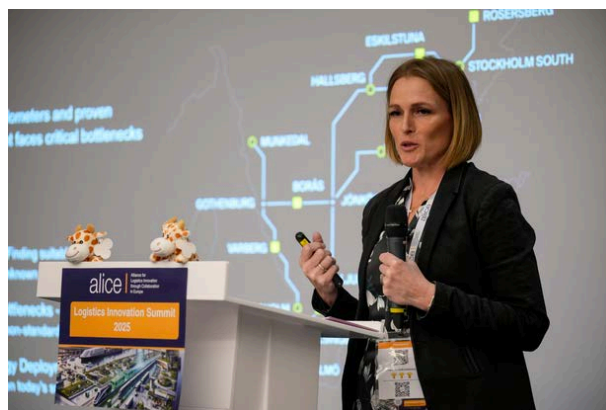
**Koen Noyens** presented Milence's progress in building a pan-European network of public charging hubs for heavy-duty trucks. In just three years, the company has launched over 25 hubs across North-Western Europe – around 250 truck connectors. To meet 2030 climate targets, this must grow to more than 10,000. Noyens underlined the need for faster permitting, better grid readiness, and stronger demand visibility to attract private investment.

**Janez Humar**, from Slovenia's transmission system operator ELES, brought the grid operator's perspective. ELES is planning large, anticipatory charging parks directly connected to the transmission grid, starting with a flagship 40-MW site near Ljubljana. He warned

that lengthy permitting processes and poor coordination between DSOs, CPOs, and public authorities can delay deployments for years. Integrating power and land planning early – and designing multi-operator hubs – is crucial for efficiency and scalability.

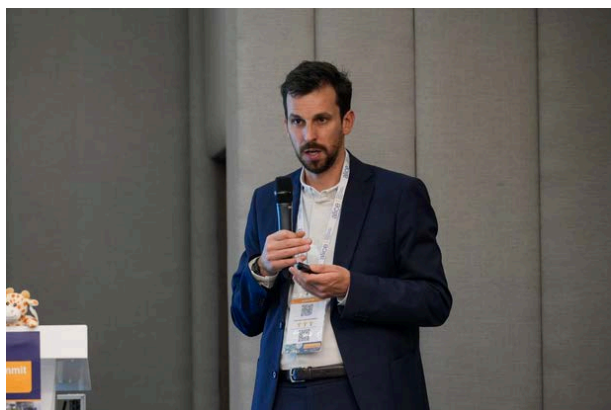


**Marie Knutsen-Oy**, Vice President for Energy Solutions at Einride, shared lessons from more than ten million electric freight kilometres across Sweden and beyond. Einride's integrated approach – combining electric fleets, digital routing, and energy management – shows that electrification can already cut operational costs by up to 8%. Yet, the biggest obstacles remain access to land with grid capacity, inconsistent permitting procedures, and utilisation risk. She stressed that infrastructure must be built where customers are already transitioning to electric fleets – not where land and grid happens to be available.



All speakers agreed that corridor-based deployment is the most efficient strategy to reach the Alternative Fuels Infrastructure Regulation (AFIR) targets. Concentrating investment along high-demand freight routes enables cross-border predictability and optimised use of grid capacity.

Projects **FLEXMCS** and **MACBETH** are demonstrating multi-point megawatt charging hubs in Germany, Belgium, and Sweden, integrating smart load management and modular design for scalable, energy-efficient infrastructure. **ESCALATE**, **NextETRUCK**, and **ZEFES** are complementing this by testing advanced zero-emission vehicle technologies and interoperability solutions across the heavy-duty sector. These efforts will feed into the HORIZON-CL5-2026-05-D5-01 large-scale demonstration call under the [ZZERO Partnership](#), which aims to test up to 100 HD-BEVs across four international corridors.



All Related call in work programme 2026-2027: [HORIZON-CL5-2026-05-D5-01 – Large-scale](#) deadline: 14th April 2026

The session concluded that Europe's freight decarbonisation will be corridor-driven, requiring simultaneous progress on grid readiness, fleet deployment, and regulatory harmonisation. Collaboration across the energy, mobility, and logistics sectors will be key to making the transition real.

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# From data to decisions: AI and Digital Twins in the Physical Internet era

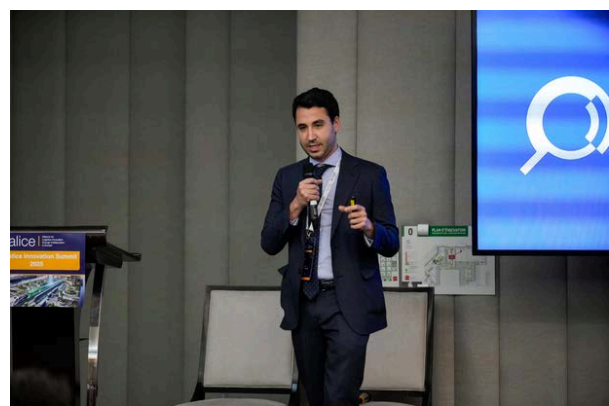
[Artificial Intelligence \(AI\)](#) and [Digital Twins](#) are rapidly moving from experimentation to real-world deployment across logistics and supply chains. The session “*From data to decisions: AI and Digital Twins in the Physical Internet era*” at the [ALICE Logistics Innovation Summit 2025](#) explored how these technologies are helping organisations improve decision-making, optimise operations and advance the implementation of the Physical Internet vision.



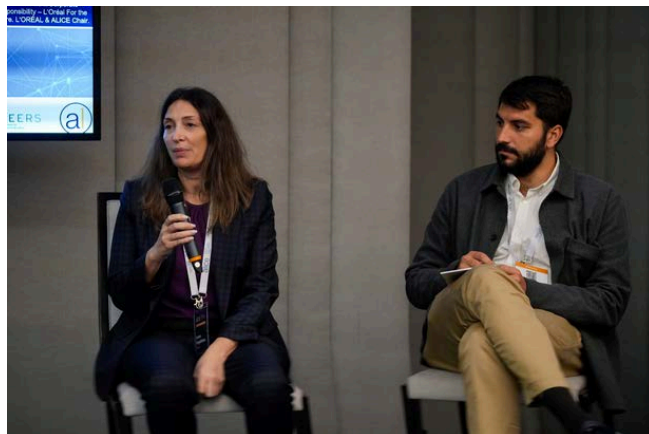
Opening the session, **Alberto Curnis** presented insights from research on AI adoption across logistics and supply chains. He emphasised that AI should not be viewed as a standalone innovation, but as the next step in a broader digital transformation journey built on process digitalisation, data collection, automation and analytics. He demonstrated how AI is already supporting operational activities such as document processing, forecasting, planning optimisation and resource allocation, delivering measurable improvements in service quality, productivity and efficiency.

The discussion then turned to the role of Digital Twins in logistics operations. **David Cipres** highlighted that Digital Twins create value when they move beyond visualisation and actively support decision-making through simulations, scenario testing and operational optimisation. Building trust in these systems, he noted, is essential if organisations are to integrate them into day-to-day business processes.

Hosted by **Giuseppe Luppino**, ALICE Programme Manager for [Corridors, Hubs and Synchronomodality](#) and [Systems & Technologies for Interconnected Logistics](#), the session brought together experts from academia, industry, technology providers and ports. Speakers included **Alberto Curnis** (Politecnico di Milano), **David Cipres** (Instituto Tecnológico de Aragón), **Ioanna Fergadiotou** (INLECOM), **Javier Garrido** (Port of Barcelona) and **François-Régis Le Tourneau** (L'Oréal and ALICE Chair). The discussion also connected to several EU-funded projects, including [DISCO](#), [URBANE](#), [AutoSUP](#), [AutoMoTIF](#), [IKIGAI](#), [PILOTS](#), [FOR-FREIGHT](#), [PIONEERS](#).



A recurring theme throughout the session was interoperability. **Ioanna Fergadiotou** stressed that many research and innovation projects continue to develop solutions independently, creating challenges when systems need to interact or scale beyond individual pilots. She called for greater alignment on standards, architectures and data-sharing approaches, while also highlighting the growing importance of explainable AI to help users understand and trust AI-generated recommendations.



Providing a practical perspective from the port sector, **Javier Garrido** presented the Port of Barcelona's experience in deploying AI and Digital Twin technologies. Examples included emissions monitoring, mobility optimisation, vessel tracking and real-time image processing supported by a private 5G network. His presentation demonstrated how ports are increasingly becoming living laboratories for digital innovation and how individual operational use cases can contribute to the gradual development of larger Digital Twin environments.



**François-Régis Le Tourneau** brought the perspective of a global industrial user, emphasising that successful AI adoption must be driven by clear business value. While technological capabilities continue to advance rapidly, he argued that organisational trust, governance and adoption may ultimately be greater challenges than technology deployment itself. He also highlighted the potential of AI and Digital Twins to support demand forecasting, orchestration, optimisation and interoperability within Physical Internet-enabled logistics networks.

Across all interventions, a common message emerged: AI and Digital Twins are no longer future concepts but operational tools capable of supporting more connected, predictive and resilient logistics systems. However, their large-scale adoption will depend on data quality, interoperability, trust and the ability to connect digital intelligence with real-world operational execution.

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# From interfaces to resilience: Future-proofing Europe's supply chain

As disruptions become more frequent and complex, resilience is moving to the forefront of logistics and supply chain discussions. The session “*From interfaces to resilience: Future-proofing Europe's supply chains*” at the [ALICE Logistics Innovation Summit 2025](#) explored how digital innovation, multimodal connectivity and stakeholder collaboration can strengthen Europe's freight transport networks while supporting sustainability and competitiveness.



Hosted by **Pablo Segura**, Junior Project Manager at ALICE, the session brought together experts from industry, research and European projects to discuss how resilience can be embedded into logistics systems and supply chain decision-making. Speakers included Sophie Punte (Life-Links), John von Stamm (FIR at RWTH Aachen), Kris Schroven (Fraunhofer EMI) and Sofoklis Dais (CERTH). The discussion drew on experiences and lessons from several EU-funded projects, including [ReMuNet](#), [SARIL](#), and [FOR-FREIGHT](#).

Other projects connected with these topics are [TRANSCEND](#), [CRISTAL](#), [PLOT0](#), [MultiRELOAD](#) and [PIONEERS](#), which are helping strengthen the resilience, sustainability and interoperability of Europe's freight transport networks.

Opening the discussion, **Sophie Punte** highlighted the growing exposure of global supply chains to disruptions ranging from climate-related events to geopolitical instability. She emphasised that transport links are often overlooked despite being critical to supply chain resilience, particularly for vulnerable communities. Through practical examples from agricultural supply chains, she demonstrated how collaborative risk assessment and targeted interventions can strengthen logistics networks and reduce vulnerabilities.



**John von Stamm** focused on Europe's increasing dependence on external sources of critical raw materials and the risks this creates for economic resilience. He argued that the transition towards a circular economy is not only an environmental necessity but also a strategic response to growing resource dependencies. Digital technologies, including digital product passports and collaborative data sharing, were highlighted as important enablers of more predictive and resilient supply chains, while reverse logistics was identified as a key component of future circular systems.

The role of digital tools in strengthening resilience was further explored through the SARIL project. **Kris Schroven** presented how the project analyses disruptions ranging from pandemics and geopolitical crises to floods, wildfires and cyberattacks. By combining risk assessment, transport modelling and sustainability analysis, SARIL is developing decision-support tools that help stakeholders better anticipate, assess and mitigate disruptions across freight transport networks.



**Sofoklis Dais** showcased the FOR-FREIGHT project, which focuses on improving multimodal freight transport by addressing inefficiencies at key transport interfaces. Through the use of AI, IoT, digital twins and blockchain technologies, the project supports collaboration between stakeholders and improves operational performance across multimodal supply chains. Pilot implementations in Greece, Romania and Spain have already demonstrated measurable operational and environmental benefits.

Throughout the session, a common message emerged: resilience should not be viewed as separate from efficiency or sustainability. Instead, these objectives must be addressed together. Participants stressed that logistics systems designed solely for efficiency may struggle to cope with unexpected disruptions, while resilient systems are better positioned to maintain performance, support decarbonisation objectives and adapt to changing conditions.



The panel discussion also highlighted the distinction between reliability and resilience. While reliability focuses on maintaining stable operations under expected conditions, resilience is the ability to absorb, adapt to and recover from disruptions. Achieving this requires greater flexibility, redundancy and collaboration across supply chain actors, as well as a shift in mindset towards proactive risk management and long-term system robustness.

The discussion also connected to a broader portfolio of European research and innovation initiatives. Projects such as [ReMuNet](#), [TRANSCEND](#), [CRISTAL](#), [PLOTQ](#), [MultiRELOAD](#) and [PIONEERS](#) are exploring solutions ranging from resilient multimodal networks and collaborative logistics to digitalisation, interoperability and sustainable freight operations. Together with SARIL and FOR-FREIGHT, these initiatives demonstrate how research and innovation can support more adaptive and future-proof supply chains.

The session concluded that building resilient transport networks will be essential for Europe's future competitiveness. By combining digital innovation, multimodal connectivity and stronger collaboration across stakeholders, logistics systems can become more adaptable, sustainable and better prepared for future challenges.

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# Rivers of opportunity:

## Unlocking inland waterways for urban and long distance freight



The **ALICE Logistics Innovation Summit 2025** highlighted the untapped potential of Europe's rivers and canals with the session "*Rivers of Opportunity: Unlocking Inland Waterways for Urban and Long-Distance Freight*". As the EU accelerates its decarbonisation agenda, inland waterways are increasingly recognised as a clean, efficient, and underused transport mode capable of supporting both urban logistics and long-distance freight

flows, while contributing to congestion reduction, emission cuts, and system resilience.

The session was hosted by **Elvina Nowak**, Project Manager at ETP-ALICE, and coordinated by **Nik Delmeire**, Senior Expert at ETP-ALICE, together with **Marion Cottet**, Urban Logistics Deputy Programme Manager and Project Manager at ALICE. It brought together policymakers, innovators, and practitioners active in inland waterway transport, with contributions linked to ALICE-related projects [MULTIRELOAD](#), [CRISTAL](#), [FOREMAST](#), [PLOT0](#), [IKIGAI](#), and [DECARBOMILE](#).

Discussions opened with a shared recognition that inland waterways, despite being one of the most energy-efficient and low-emission transport modes, remain underutilised—particularly in urban contexts. Participants stressed that increasing the use of inland waterway transport is essential to meet Europe's climate and sustainability objectives, as outlined in EU strategies such as **NAIADES III** and initiatives supporting the integration of inland waterways into the **TEN-T network** and local supply chains. At the same time, limited integration with last-mile logistics, fragmented governance between cities and ports, and the need for innovative vessels, terminals, and digital solutions continue to hinder wider uptake.



The first part of the session focused on the role of inland navigation within the **Physical Internet**. **Jef Bauwens**, Project Manager at **De Vlaamse Waterweg**, presented how inland waterway transport could align with Physical Internet principles and questioned whether inland navigation is ready to operate within open, modular, and interoperable logistics systems. His presentation was followed by an interactive discussion with participants and panellists, exploring the implications for standardisation, digitalisation, and governance.

The second part of the session turned to the practical challenges and opportunities of connecting the hinterland with urban nodes. Under the moderation of **Nik Delmeire**, the panel brought together **Eloi Flipo** (Voies Navigables de France), **Herfried Leitner** (TTS), **Yves de Blic** (Multitel), **Matteo Matarazzo** (IWT Platform), and **Jef Bauwens** (De Vlaamse Waterweg). Panellists discussed barriers faced by inland waterway transport, as well as opportunities to ease congestion, reduce emissions, and improve liveability in city centres by shifting freight flows from roads to rivers and canals.



The session confirmed strong interest in positioning inland waterways as an integral part of Europe's future logistics ecosystem. Participants agreed that unlocking their full potential requires closer integration with urban logistics strategies, improved coordination between ports and cities, and continued innovation in vessels, terminals, and digital solutions. The discussion also reinforced the importance of integrating inland waterways into the **Physical Internet vision**, enabling seamless connections with road and rail transport.

Several ALICE-related projects are already supporting this transition. **MULTIRELOAD** and **CRISTAL** demonstrate multimodal and synchromodal concepts in European corridors, developing governance and digital frameworks applicable to inland waterways. **FOREMAST** explores future-proof and energy-efficient vessels and terminal solutions aligned with zero-emission goals. **PLOTO** and **DECARBOMILE** contribute through innovative digital platforms, decarbonisation pathways, and demonstration pilots improving the operational efficiency and sustainability of inland navigation.



The session contributes directly to **ALICE Thematic Groups TG2 (Corridors, Hubs and Synchromodality)**, **TG3 (Systems and Technologies for Interconnected Logistics)**, and **TG5 (Urban Logistics)**, and supports future EU research and innovation directions, including the call **CL5-2025-01-D6-10 – Integrating inland waterway transport in smart shipping and multimodal logistics chains**.

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# The rise of automation in logistics

Automation is reshaping European freight systems across roads, ports, terminals, and intermodal hubs. The session “*The Rise of Automation in Logistics*” at the ALICE Logistics Innovation Summit 2025 explored how Europe can move from isolated pilots toward coordinated, large-scale deployment of automated logistics operations across borders and modes.



Hosted by **Angjelo Andoni**, ALICE Deputy Programme Manager, the session brought together speakers representing the European Commission, leading logistics operators, and major ports: **Lee Bugeja-Bartolo**, **Pia Wijk** (Einride), **Mads Rasmussen** (DFDS), and **Karen Van Brussel** (Port of Antwerp-Bruges). It was linked to a wide ecosystem of EU-funded automation projects: [MODI](#), [CCAMBassador](#), [AUTOSUP](#), [AutoMoTIF](#), [SEAMLESS](#), [FOREMAST](#), [MultiRELOAD](#), and [URBANE](#).

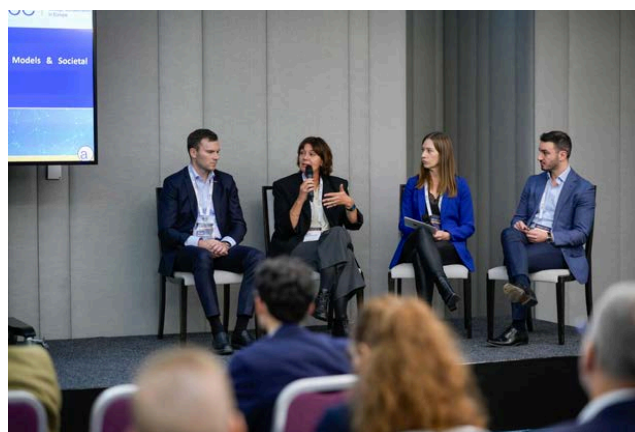
Angjelo Andoni opened the session by outlining ALICE’s “automation storyline,” showing how automation now spans all five ALICE Thematic Groups. He highlighted how road-focused initiatives like **MODI** and **CCAMBassador** are converging with automation in terminals and ports through **AUTOSUP**, **AutoMoTIF**, **SEAMLESS**, **FOREMAST**, and **MultiRELOAD**, forming the backbone for future Large-Scale Demonstrations (LSDs) under CCAM.

**Lee Bugeja-Bartolo** (DG MOVE) presented the European Commission’s plans for **Large-Scale Cross-Border Testbeds for Autonomous Vehicles**. These testbeds will serve as long-term environments equipped with regulatory sandboxes, enabling automated freight services to be tested under real conditions while accelerating regulatory alignment between Member States. He noted a strong interest in freight automation from several countries, positioning logistics as a priority use case.



A live SLIDO poll revealed the main obstacles slowing deployment: a lack of interoperability and harmonised standards, complex permitting processes, gaps in data-sharing and evaluation frameworks, concerns about technology reliability, unclear business models, and the need for greater societal and workforce readiness. These themes framed the panel discussion.

**Pia Wijk** (Einride) stressed that vehicle automation cannot progress without parallel **digitalisation of logistics processes**, including planning workflows, yard operations, and driver hand-offs. **Mads Rasmussen** (DFDS) emphasised the need for multi-OEM, interoperable solutions that link road corridors with hubs and terminals, highlighting persistent challenges with site readiness and digital infrastructure. **Karen Van Brussel** (Port of Antwerp-Bruges) showcased progress in port automation, including autonomous vessel and



drone applications, and underlined the importance of synchronising road and port automation rather than developing them in silos. Returning to the regulatory dimension, **Lee Bugeja-Bartolo** clarified that the Commission’s testbeds represent a transition step toward deployment, not another round of short-lived pilots, and noted the complementary role of CCAM Large-Scale Demonstrations and potential IPCEI work for industrial scale-up.

All speakers agreed that automation is advancing – but not yet at the required scale. Fragmented permitting, inconsistent site readiness, limited interoperability, and the lack of reusable evidence continue to slow progress. Achieving deployment across European corridors and hubs will require coordinated digitalisation, harmonised regulation, viable business models with 24/7 utilisation, and early engagement with workers and communities to build acceptance.



Projects such as **MODI** and **CCAMBassador** are already preparing the regulatory, operational, and stakeholder foundations for cross-border automated freight. Meanwhile, **AUTOSUP**, **AutoMoTIF**, **SEAMLESS**, **FOREMAST**, **MultiRELOAD**, and **URBANE** are advancing automation across ports, terminals, and last-mile environments, ensuring that future large-scale demonstrations can deliver end-to-end automated logistics systems.

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# The multimodal leap:

## ALICE EXPRESS and integrated logistics

Achieving Europe's ambitions for greener, more resilient freight transport requires a significant shift from road to rail. Yet challenges such as fragmented data, capacity constraints, regulatory complexity and investment risks continue to slow progress. The session *"The multimodal leap: ALICE EXPRESS and integrated logistics"* at the [ALICE Logistics Innovation Summit 2025](#) explored how collaboration across the logistics ecosystem can help overcome these barriers and accelerate multimodal freight transport.



Hosted by **Andrea Calin**, ALICE Senior Innovation Manager and ALICE EXPRESS Project Lead, the session brought together shippers, logistics service providers, technology platforms and rail innovation experts to discuss practical pathways for scaling rail freight and multimodal logistics. Speakers included **Michael Archer** ([CHEP Europe](#) and [ALICE TG4 Chair](#)), **Serge Schamschula** ([Transporeon](#) and [ALICE TG4 Vice Chair](#)), **Nicolas Furio** ([Europe's Rail Joint Undertaking](#)), **Denis Brangeon** ([Michelin](#)), **Szymon Pizyk** ([Codognotto Italia](#)) and **Ireneusz Frankowski** ([Miratrans](#)).

At the heart of the discussion was **ALICE EXPRESS**, a collaborative initiative designed to help shippers pool freight volumes, enable logistics service providers to develop viable multimodal services and create the visibility needed to support trust and long-term investment decisions. Participants agreed that no single actor can deliver the modal shift alone and that collaboration is essential to unlock the full potential of rail freight.

Insights from the ALICE-Transporeon Intermodal Survey challenged several common assumptions about intermodal transport. The findings showed that intermodal services can often match or even outperform road transport on long-distance corridors. The discussion also revealed that many delays occur during first- and last-mile operations rather than on the rail leg itself, highlighting the importance of integrated planning across the entire transport chain.



Digital visibility emerged as another critical enabler. Participants stressed that successful multimodal operations require transparent and interoperable data sharing across shippers, logistics providers, terminals and digital platforms. Real-time visibility not only improves operational planning but also helps build trust between partners and reduces uncertainty when shifting freight to rail.



The perspective of logistics service providers reinforced the importance of stable demand. Representatives from Codognotto and Miratrans explained that intermodal services can be economically viable when freight volumes are predictable and terminal operations are efficient. Collaborative approaches such as ALICE EXPRESS can reduce investment risks and support the development of new services, terminals and corridor connections.



The session also highlighted ongoing innovation efforts led by Europe's Rail. **Nicolas Furio** presented developments in areas such as Digital Automatic Coupling (DAC), digital capacity management and cross-border harmonisation, all of which aim to improve the efficiency and competitiveness of rail freight. However, speakers agreed that innovation alone is not enough. Successful deployment requires market uptake, coordinated action and practical implementation on real transport corridors.

Several European initiatives contribute to this transition. ALICE EXPRESS builds on lessons from broader innovation activities and complements projects supporting multimodal, sustainable and resilient freight transport across Europe. The discussion connected with wider efforts across the ALICE community to improve collaboration, digitalisation and corridor performance.

A clear message emerged throughout the session: the future of multimodal logistics depends on cooperation rather than competition. By aligning shipper demand, logistics capacity, digital visibility and rail innovation, Europe can create the conditions needed to scale rail freight and achieve its sustainability and resilience objectives.

The session concluded with a call for concrete action. Participants encouraged shippers, logistics service providers, technology providers and policymakers to work together on first-mover corridors, share experiences and data, and accelerate the deployment of practical multimodal solutions capable of delivering measurable modal shift across Europe.

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# Smart and green ports, connected hubs: Implementing the EU Port Strategy

Ports are evolving beyond their traditional role as transport gateways to become innovation ecosystems, energy hubs and digital connectors within Europe's logistics network. The session *"Smart and green ports, connected hubs: Implementing the EU Port Strategy"* at the [ALICE Logistics Innovation Summit 2025](#) explored how ports can support the green and digital transition while strengthening resilience and competitiveness across European freight transport.



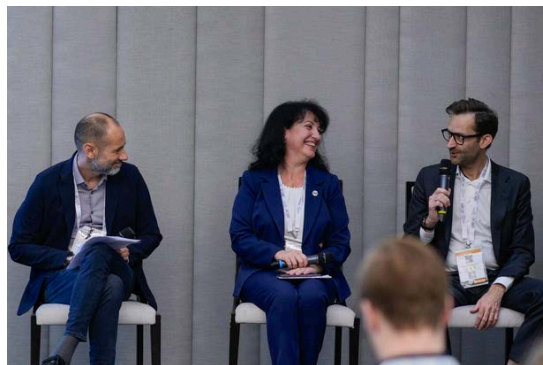
Hosted by **Giuseppe Luppino**, ALICE Programme Manager for [Corridors, Hubs and Synchronodality](#), the session brought together **Jaap Gebraad** ([Waterborne Technology Platform](#)), **Salvador Furió** ([Valenciaport Foundation](#)) and **Alina Beatrice Raileanu** ([Tehnopol Association, Galati](#)), alongside representatives from projects including [PIONEERS](#), [FOR-FREIGHT](#), [MultiRELOAD](#), [TRANSCEND](#), [AutoSUP](#) and [AutoMoTIF](#).

Opening the session, **Giuseppe Luppino** presented ALICE's work through the Ports & Hubs Task Force, which is contributing to the development of the forthcoming EU Port Strategy. He highlighted the importance of connecting ports, logistics corridors and inland hubs to create a more efficient, resilient and zero-emission logistics system.

**Jaap Gebraad** emphasised that the challenge for Europe is no longer only developing innovative technologies, but ensuring their large-scale deployment. While many waterborne transport solutions have already demonstrated their technical feasibility, wider adoption depends on business readiness, investment, ecosystem coordination and stronger public-private cooperation. He also stressed that different vessel types, fuels and operational conditions require tailored pathways towards decarbonisation rather than one-size-fits-all solutions.



From the perspective of a major seaport, **Salvador Furió** highlighted the role of ports as complex innovation ecosystems involving public authorities, terminal operators, technology providers, research organisations and logistics companies. Drawing on experiences from Valencia, he demonstrated how European projects have supported the development of port community systems, AI-based prediction tools and digital platforms that improve multimodal transport operations. He stressed the importance of ensuring continuity beyond individual projects to maximise the impact of innovation investments.



Representing the inland port perspective, **Alina Beatrice Raileanu** showcased the strategic role of the Galati ecosystem in the Lower Danube region. With its proximity to Moldova and Ukraine, the region has become increasingly important for resilient and secure freight flows. Projects such as [FOR-FREIGHT](#), [PLOT0](#) and [Vital5G](#) are supporting digitalisation, communication systems, hazard prediction and stakeholder training, while cybersecurity is becoming an increasingly important priority.



Across all interventions, a common message emerged: successful port transformation depends on more than technology alone. Governance, financing, skills, data sharing, cybersecurity and collaboration across the entire port community are essential to bridge the gap between pilot projects and large-scale deployment.

Audience discussions reinforced the importance of integrating ports with inland corridors and logistics hubs, while also highlighting opportunities in process optimisation, such as port call coordination and just-in-time arrivals. Participants agreed that the future EU Port Strategy should recognise the diversity of European ports and support flexible approaches that enable both large maritime ports and smaller inland ports to contribute to Europe's green and digital transition.

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# Beyond boundaries:

## Building Europe's smart and collaborative intralogistics community

Intralogistics is becoming a strategic pillar of Europe's logistics transformation. The session *"Beyond Boundaries: Building Europe's Smart and Collaborative Intralogistics Community"* at the [ALICE Logistics Innovation Summit 2025](#) explored how Europe can bridge the long-standing gap between transport logistics and intralogistics to build a truly synchronised and resilient supply chain.



Organised by **Teemu Hämäläinen** and **Hannu Tapio** from **LIMOWA**, together with **Fernando Liesa** and **Tomasz Dowgielewicz** from **ALICE**, the session marked a significant expansion of ALICE's scope with a dedicated focus on intralogistics. With the European intralogistics market expected to grow from USD 16.4 billion to USD 44 billion by 2030, participants examined how collaboration inside the "four walls" of warehouses directly impacts transport efficiency beyond them.

The discussion opened with a shared diagnosis of the operational disconnect between transport and warehouse operations, often described as a persistent "blame game." Participants agreed that this siloed approach is no longer viable. Transport efficiency frequently depends on upstream intralogistics decisions, such as pallet configuration, order release timing, and warehouse readiness. The emerging ALICE Intralogistics Community aims to manage this critical "handshake" between intralogistics and transport, enabling a shift from reactive problem-solving to proactive collaboration supported by shared, real-time data on truck arrivals and warehouse operations.



The session then turned to the technological realities shaping modern warehouses. As automation accelerates, the traditional single-supplier model is giving way to more complex environments where **Automated Guided Vehicles (AGVs)** and **Autonomous Mobile Robots (AMRs)** from multiple vendors must interoperate. Participants identified the lack of standardisation as a major bottleneck and highlighted standards such as **VDA 5050** as essential to avoid vendor lock-in. A specific challenge discussed was Europe's "brownfield" reality: while new warehouses can be designed for automation, integrating advanced robotics into existing facilities requires adaptable and scalable solutions, which the community intends to catalogue and share.



Beyond technology, speakers emphasised the social and environmental dimensions of intralogistics. Labour shortages across Europe demand a rebranding of the sector – from low-skilled manual work to a high-tech profession driven by AI and IT. At the same time, warehouses are evolving into energy hubs, supporting the decarbonisation of logistics networks through renewable energy integration and improved carbon transparency.

All participants agreed on the strong need to formally launch the [ALICE Intralogistics Community](#). Innovation in this field must extend beyond machinery to include process optimisation, data standardisation, and workforce professionalisation. Next steps include formalising the community in early 2026, mapping member interests and contributions, defining a 2026 work plan combining online collaboration, physical workshops, and technical visits, and building a shared repository of best practices, use cases, and ongoing R&I projects. The community will also explore how intralogistics integrates with the b and Europe’s zero-emission ambitions.

Interested organisations are encouraged to share their views on the scope, structure, and priorities of the initiative by completing the **Intralogistics Community feedback and engagement questionnaire**: [ALICE Intralogistics Community – Member Interest Questionnaire](#)



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# Shared cities: Unlocking space for sustainable Urban Logistics

Cities across Europe are rethinking how urban space can serve both people and logistics. The “**Shared Cities**” session at the **ALICE Logistics Innovation Summit 2025** explored how parking areas, markets, and other underused infrastructures can be repurposed into shared, multifunctional logistics hubs – a key step toward zero-emission and efficient city deliveries.



Hosted by **Marion Cottet**, ALICE Urban Logistics Deputy Programme Manager, the session brought together a strong line-up of speakers from the **European Commission, La Poste, DHL, FIT Consulting,** and **Cross River Partnership**, alongside representatives from **CityLogIn** and several EU-funded projects including [DECARBOMILE](#), [DELPHI](#), [DISCO](#), [LogE-Hubs](#), [UNCHAIN](#), and [URBANE](#).

Isabelle Vandoorne’s keynote set the tone for the discussion by reaffirming the Commission’s commitment to including urban logistics into the broader sustainability agenda, such as in the EU Urban Mobility Framework (2021). Her intervention linked policy, planning, and practice through four main lenses: governance (multi-actor collaboration), integration (logistics within Sustainable Urban Mobility Plans (SUMP) and land-use planning: mandatory for all 431 TEN-T urban nodes by 2027), digitalization (European Mobility Data Space will incorporate logistics), and investment (EU funding exceeding €220 million since 2014 have funded innovation in sustainable urban freight and space optimization). Vandoorne called for shared urban space that must be co-designed by cities and logistics actors and started partnerships such as POLIS-ALICE which exemplify the required multi-level dialogue to translate European guidance into local implementation.



**Alfonso Molina Rico** (CityLogIn) shared how Madrid and Zaragoza are transforming parking facilities and market areas into shared micro-logistics hubs, enabling low-emission deliveries and improved urban accessibility. **Ross Phillips** (Cross River Partnership) presented London’s award-winning Waterloo Freight Hub, which repurposed a disused railway arch into a zero-emission delivery facility.



During the panel, **Johan Leveque** (La Poste), **Maria Ramírez Gutierrez** (DHL), **Paola Cossu** (FIT Consulting), and **Isabelle Vandoorne** discussed how interoperability, trust, and local collaboration can turn these pilots into scalable models. Cossu highlighted synergies between projects **DISCO** and **URBANE**, which are developing digital tools such as the **Urban Freight Data Space** to help cities map and manage logistics assets more efficiently.



Across all interventions, a clear message emerged: **reusing existing space is faster, cheaper, and more sustainable than building new infrastructure.** Achieving this, however, depends on shared governance frameworks and mutual trust between public and private actors. As **Johan Leveque** concluded, “Collaboration cannot be imposed – it must grow from shared incentives.”

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# New logistics playground: megatrends, policy and technology in action

Climate change, digital transformation, artificial intelligence are reshaping the logistics sector at an unprecedented pace. As supply chains become increasingly exposed to environmental, economic and geopolitical pressures, logistics is evolving from a facilitator of trade into a strategic driver of resilience, sustainability and competitiveness.



The plenary session “*New logistics playground: Megatrends, policy and technology in action*” at the [ALICE Logistics Innovation Summit 2025](#) explored how these global trends are transforming logistics and creating both challenges and opportunities for the sector. Moderated by **Fernando Liesa**, Secretary General of ALICE, the session brought together Professor **Alan McKinnon** ([KLU Kühne Logistics University](#)), **Sebastien Lacombe** ([Geopost](#)) and **Marianna Levto** ([Hoopo](#)) to provide perspectives from academia, industry and entrepreneurship.

Opening the session, Professor Alan McKinnon challenged participants to rethink the relationship between logistics and climate change through the concept of “Climate Logistics”. Drawing on the latest climate science, he highlighted growing evidence that climate change is accelerating and that its impacts are becoming increasingly visible through rising temperatures, extreme weather events and growing disruption risks for supply chains.

**McKinnon** argued that logistics should no longer be viewed solely as a contributor to climate change. Instead, he identified several interconnected roles that logistics will play in addressing the climate crisis. Beyond being a source of greenhouse gas emissions that must be reduced, logistics acts as a decarbonized through efficiency improvements and renewable energy adoption, an adaptor helping societies respond to climate impacts, a facilitator of renewable energy deployment and circular economy systems, a rescuer supporting humanitarian response and disaster relief, and increasingly a remover by enabling future carbon capture and carbon removal activities.



His intervention highlighted that decarbonisation, while essential, is only one part of a much broader climate agenda. Future logistics systems will need to become more resilient, adaptive and capable of supporting wider societal transitions towards climate neutrality.

Providing the industry perspective, **Sebastien Lacombe** demonstrated how Geopost is integrating sustainability and digital transformation into its business strategy. He explained how environmental objectives, operational excellence and data-driven decision-making are increasingly interconnected and can reinforce one another when embedded into core business processes.

**Lacombe** highlighted Geopost's commitment to achieving net-zero emissions by 2040 and showcased how investments in low-emission vehicles, alternative fuels, carbon measurement and operational optimisation are already contributing to measurable results. He also presented the role of the Geopost Lab, which serves as an innovation platform supporting the identification, testing and scaling of new solutions across the organisation.



Examples ranged from artificial intelligence and predictive analytics to robotics, automation, electric heavy-duty vehicles, urban logistics innovations and smart parcel lockers. Through these initiatives, Geopost is demonstrating how innovation can become a strategic capability that simultaneously improves competitiveness and sustainability.

The entrepreneurial perspective was provided by **Marianna Levto**, who focused on the role of startups and innovation ecosystems in shaping the future of logistics. Drawing on her experience supporting supply chain technology ventures, she highlighted the unique challenges startups face when bringing disruptive solutions into a traditionally conservative and operationally complex industry.



Levto stressed that successful innovation depends on much more than technology. Leadership, organisational culture, customer relationships, trust and long-term partnerships are often decisive factors in determining whether promising ideas can achieve market adoption and scale. She argued that creating stronger connections between startups, established companies, researchers and policymakers is essential to accelerate innovation and strengthen Europe's competitiveness.

Across all interventions, a common message emerged: the future of logistics will be defined by the ability to integrate climate action, digital technologies and innovation into coherent and scalable business strategies. Climate adaptation, resilience, artificial intelligence, automation and entrepreneurship are no longer separate topics but increasingly interconnected drivers of transformation and competitiveness.

The discussion reinforced the importance of collaboration across industry, research, policymakers and entrepreneurs. By fostering innovation ecosystems and accelerating the deployment of new solutions, the logistics sector can play a central role in supporting Europe's economic competitiveness while contributing to broader environmental and societal objectives.

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