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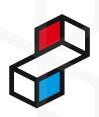


URG LUXEMBOURG

SINGLE WINDOW

POWERING BUSINESS

ADDING VALUE IS THE KEY.



Introduction Cluster for Logistics Luxembourg



Mr. Malik Zeniti
Director at Cluster for Logistics Luxembourg



Conference Programme



• 16:00	Carlo Thelen, President at Cluster for Logistics	Welcome and Introduction on relaunch expectations	
• 16:05	Franz Fayot, Minister of the Economy	The future of data driven supply chain	
• 16:15	Karine Bellony, Managing Partner of VAT Solutions	Impact of VAT law changes on E-commerce & logistics	
• 16:25	Richard Forson, CEO at Cargolux	The Post-COVID view from the airfreight sector	
• 16:35	Thierry Schoen, PTSG Sales director	Post-Brexit view of supply chain in UK 2021	
• 16:45	Luc Provost, CEO at B Medical Systems	The global supply chain challenge for COVID-19 vaccines	
• 16:55	Round table: "Airfreight, Innovation & Supply Chain: Quo vadis?"		
	with Achim Taylor (POST Luxembourg), Jürgen Helten (Luxport Group), Richard Forson (Cargolux) and Christian Wilh (SHIPSTA) Moderation by Hjoerdis Stahl, Deputy Managing Director at POST Luxembourg		
• 17:40	Malik Zeniti, Director at Cluster for Logistics	The view of the Cluster for Logistics	
• 17:50	Networking opportunity and Drink		

CLUSTER FOR LOGISTICS

LUXEMBOURG



Opening Speech

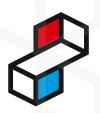


Mr. Carlo Thelen

President of the Cluster for Logistics Luxembourg

Director General at Chamber of Commerce

Welcome and Introduction on Relaunch Expectations



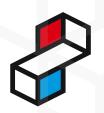
The view of the Ministry of Economy



Mr. Franz Fayot

Minister of the Economy

The future of data driven supply chain



VAT in the spotlight



Ms. Karine Bellony

Managing Partner of VAT Solutions

Impact of VAT changes on e-commerce & logistics



Logistics 2021 Post-Covid reloaded

Impact of VAT changes on e-commerce & logistics



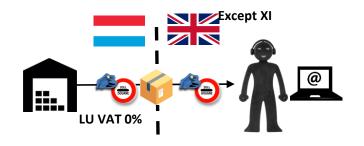
Recent 2021 VAT changes

- Brexit: New VAT rules on e-commerce with the UK (1st January 2021)
- e-commerce: new VAT rules on distance sale of goods to private persons (1st July 2021)
- Logistic activities: new VAT obligations for warehouse keepers (1st July 2021)



Brexit / 1st January 2021 New VAT rules on e-commerce with the UK (1/2)

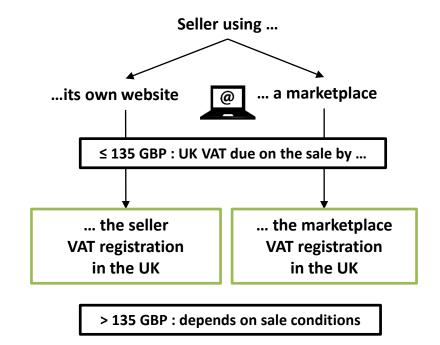
- Sales of goods dispatched to the UK are VAT exempt in Luxembourg (export) and are subject to customs declarations in Luxembourg and in the UK
- Exception: Northern Ireland (XI), where EU VAT rules remain applicable until end of 2024





Brexit / 1^{st} January 2021 New VAT rules on e-commerce with the UK (2/2) Focus on sale of low value goods ≤ 135 GBP

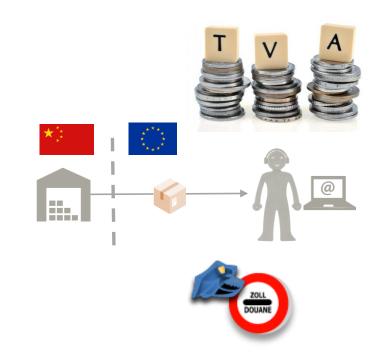
- e-commerce actors selling low value goods (≤ 135 GBP) must collect VAT on their sales to UK private persons, unless they use a third party marketplace
- Consequently, e-commerce actors selling low value goods through their own website must register for UK VAT





e-commerce / 1st July 2021 New EU VAT rules on distance sale of imported goods (1/3)

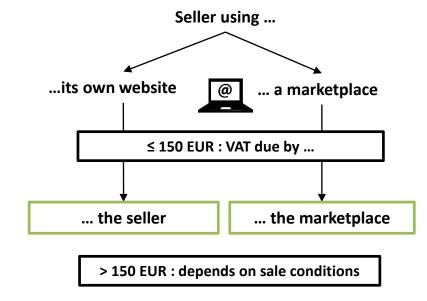
- Distance sale of imported goods are subject to VAT in the destination country
 - Whereas a VAT relief used to apply before 1st July 2021 on importation of Low Value Goods (LVG) ≤ 22 EUR
- Importation of LVG triggers new mandatory customs declarations
 - Possible use of super reduced dataset





e-commerce / 1^{st} July 2021 New EU VAT rules on distance sale of imported goods (2/3)

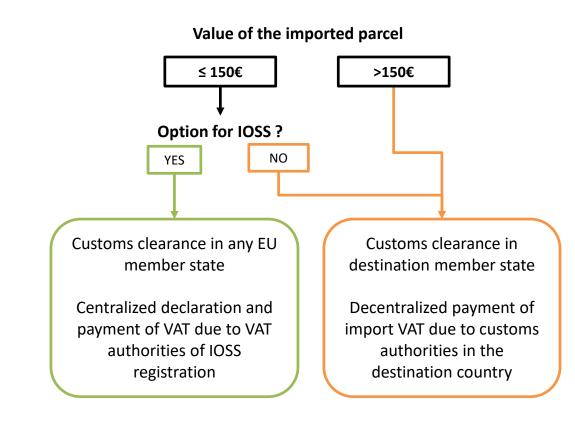
• Electronic interfaces (EI) facilitating the sale of goods on internet are liable for VAT due on distance sale of LGV ≤ 150 EUR, instead of the seller





e-commerce / 1st July 2021 New EU VAT rules on distance sale of imported goods (3/3)

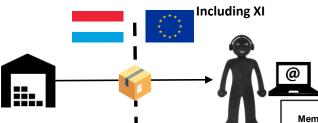
- Seller or EI can opt for IOSS (Import One Stop Shop) for LVG ≤150€
 - IOSS allows centralized declaration and payment of VAT due in every destination member state to one single member
 - VAT due is collected on the sale, not on importation, thus facilitating customs formalities of IOSS parcels
 - Parcels can be presented to customs for clearance in any EU member state





e-commerce / 1^{st} July 2021 New VAT rules on intracommunity distance sale of goods (1/2)

 Intracommunity distance sale of goods are subject to VAT in the member state of destination, at the VAT rate applicable there



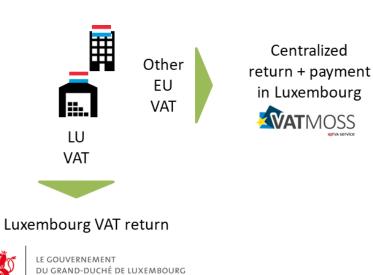
Member States	Standard Rate	Reduced Rate	Super- reduced Rate	Parking Rate
Austria	20	10 / 13	-	13
Belgium	21	6 / 12	-	12
Bulgaria	20	9	-	-
Cyprus	19	5/9	-	-
Czech Republic	21	10 / 15	-	-
Germany	19	7	-	-
Denmark	25	-	-	-
Estonia	20	9	-	-
Greece	24	6 / 13	-	-
Spain	21	10	4	-
Finland	24	10 /14	-	-
France	20	5.5 / 10	2.1	-
Croatia	25	5 / 13	-	-
Hungary	27	5 / 18	-	-
Ireland	23	9 / 13.5	4.8	13.5
Italy	22	5 / 10	4	-
Lithuania	21	5/9	-	-
Luxembourg	17	8	3	14
Latvia	21	5 / 12	-	-
Malta	18	5/7	-	-
Netherlands	21	9	-	-
Poland	23	5/8	-	-
Portugal	23	6 / 13	-	13
Romania	19	5/9	-	-
Sweden	25	6 / 12	-	-
Slovenia	22	5 / 9.5	-	-
Slovakia	20	10	-	-
Irlande du Nord	20	5	-	-



e-commerce / 1^{st} July 2021 New VAT rules on intracommunity distance sale of goods (2/2)

 In order to avoid VAT registration in each member state, the seller can opt for OSS (One Stop Shop)

 OSS allows centralized declaration and payment of VAT due in every destination member state to the Luxembourg authorities







Logistics / 1st July 2021

New VAT obligations for Luxembourg warehouse keepers (art. 70bis of the VAT Law)



If the goods stored in Luxembourg meet the following 4 cumulative conditions ...



... then the warehouse keeper shall meet the following obligations :

- They are owned by a taxable person who is established outside the European Union
- They have been imported into Luxembourg from a third country
- They are intended to be sold or transferred to another Member State
- They haven't been sold nor transferred within the European Union since their introduction in Luxembourg

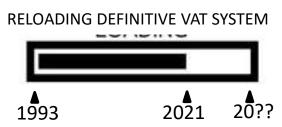
- Obligation to identify the owner of the goods and to ensure their identity
- Obligation to keep at the disposal of the VAT authorities during 10 years the following information concerning the stored goods: their origin, their nature, their quantity, their holding and the identity of the owner of the goods
- Obligation to inform by any means the owners of the goods of their VAT obligations*



^{*} In order to fulfil this obligation, feel free to use our <u>factsheet Logistics and VAT in Luxembourg</u>, which can be downloaded from our website and communicated by any means to your customers, by keeping a proof of transmission

Conclusion Work in progress!

- Stakeholders had to face major VAT changes in 2021, that significantly impacted import/export supply chains
- Further changes are still expected
 - Brexit story is not over
 - New VAT rules on e-commerce and associated OSS/IOSS declarations need to stabilize
 - EU Commission is still working on further adaptation and improvement of the VAT system





Merci pour votre attention

VAT Solutions Sàrl 61 avenue de la Gare L-1611 Luxembourg

Karine Bellony, Managing Partner T 26 945 944 15 karine.bellony@vat-solutions.com







Mr. Richard Forson
CEO Cargolux

The post-COVID view from the airfreight sector





Thierry Schoen PTSG Sales dir.

Post-Brexit view of supply chain in UK

Post -Brexit view of supply chain UK 2021



Supply chain crisis = Cut in UK manufacturing output

- Covid & Brexit combined created additional pressure on the logistics systems.
- 4 consecutive quarterly downturns.
- Staff shortages (example:100K HGV drivers required)
- Export to the EU fell by 41% | Import fell by 21%



Shortages 2021

Brexit & Covid related







Brexit has worsened UK supply chain crisis

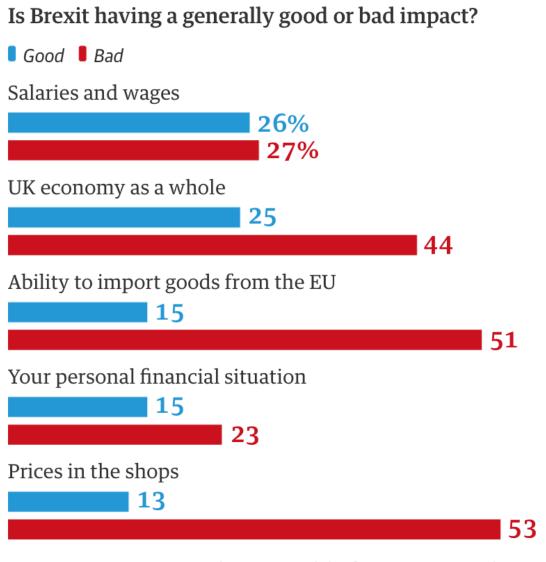
- Following the Pandemic, Brexit has made the shortages hitting the UK economy worse compared the rest of the world.
- Changes in migration and trading regimes with the EU.
- Energy costs in the UK creating higher manufacturing costs compared to EU countries, resulting in difficulties exporting UK made Products.
- · Lack of buffer stock; particular natural gas.



Supply chain disruptions are now holding back the recovery

- Demand has recovered much quicker than supply.
- Bottleneck within supply chain run up to Christmas.
- UK Gov. Extending Business Loan facilities.
- Delays holding back the recovery.
- Economy to be 3% smaller by 2024

Recent Opinium poll



Source: Opinium interviewed 2,001 UK adults from 27 to 29 October 2021

Sustainable practices & solutions

- Safeguarding against global logistics challenges by bringing supply chains back to the UK.
- Increase in customer demand to be more sustainable and environmentally conscious.
- Reducing carbon impact on supply chain.
- Allowing short term visas for HGV drivers / Vetenarians and others.
- Reducing delivery time and promoting Made in Britain products.



Disruptors

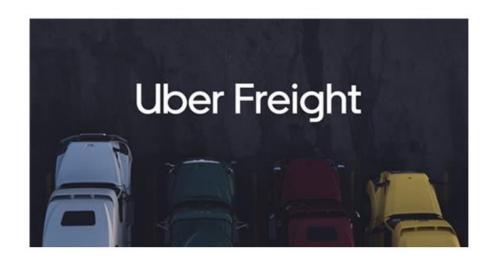
- Gig Economy Players created more jobs than any other industry.
- Amazon created 50.000 positions within the Amazon Flex program.
- Last mile delivery with flexible workforce.
- Uber Freight offering logistics services direct from peer to corporate client.



DISRUPTORS

DELIVERING FOR







Monday 17/12	3 offers
17:45 - 21:45	
4 HRS	£52
Weybridge (DXW2) - AMZL	
17:30 - 19:30	
2 HRS	£26
Camberley - Frimley (ULO1) - PN	
18:00 - 20:00	
2 HRS	£26
Camberley - Frimley (ULO1) - PN	
Tuesday 18/12	1 offer
13:30 - 16:30	
3 HRS	£39
Theale - Reading (DRG1) - AMZL	
Wednesday 19/12	1 offer
17:30 - 21:30	
4 HRS	£52
Theale - Reading (DRG1) - AMZL	
Thursday 20/12	2 offers
REFRESH	

Thank you for your time







Mr. Luc Provost
CEO B Medical Systems

The global supply chain challenge for COVID-19 vaccines

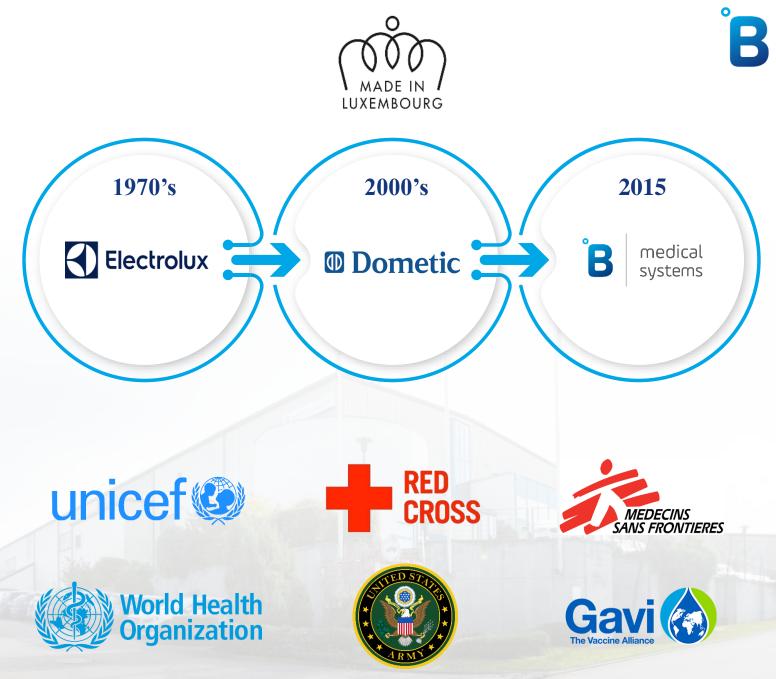
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The global supply chain challenge for COVID-19 vaccines

Global market leader in vaccine cold chain for more than 40 years; Trusted partner of global humanitarian organizations and global bodies





Our products are used across the world for storing vaccines and other temperature sensitive products



B medical systems

Installed base of more than

500K+ units

across

130+ countries

















Our vaccine cold chain portfolio offers solutions for the safe storage and transport of vaccines







- Powered by solar power. Uses no batteries
- Ideal for locations with unreliable electricity
- 10 Years warranty



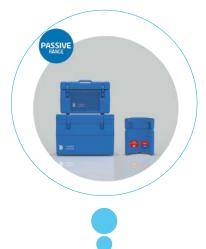
Ice-Lined Refrigerators & Freezers

- Powered by AC and suited for places with unreliable electricity
- Include products that can work as vaccine refrigerator, vaccine freezer and ice pack freezer
- Integrated voltage stabilizers for fighting voltage spikes



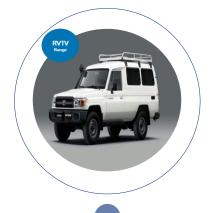
Ultra Low **Freezers**

- Operating temperature in the range of -86°C to -20°C
- Suitable for operations in tropical climate



Vaccine Transport Boxes

- For the safe transport of vaccines at -80°C, -30°C and 5°C
- WHO PQS Certified



Refrigerated Vaccine Transport Vehicle

4WD for the safe transport of vaccines, at temperatures between 2-8°C even at locations with minimal infrastructure































Our real-time monitoring systems ensure that products are monitored 24*7 irrespective of their location





RTM Data Logger Dashboard

Events/Alarms

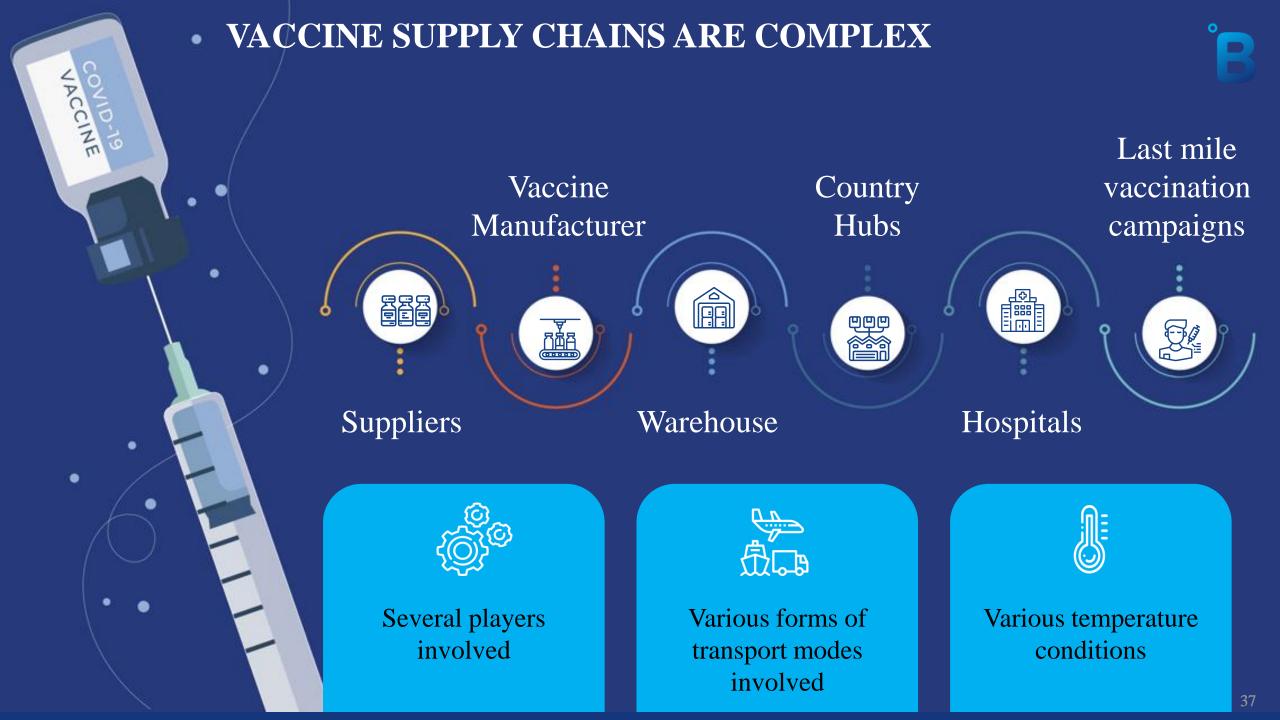


Key Data Attributes

- Internal Temperature
- External Temperature (Ambient)
- Lid Opening Reader

- Battery Level
- **GPS Positions**
- Events/ Alarms

GPS position



All players faced severe challenges during the COVID-19 vaccine roll out



MANUFACTURING



- Availability of materials (raw materials, consumables, fill/finish etc.)
- Need for large volume manufacturing

VACCINE DELIVERY



- High demand for vaccine cold chain units
- Last-mile vaccine distribution challenges
- Real-time monitoring of vaccines

LOGISTICS



- Container and trucks shortages all over the world
- Port congestions due to port closures (Covid related) and other factors(blocked Suez canal, weather phenomenon etc)
- Air freight shortages due to lack of flights

Challenge with headcount

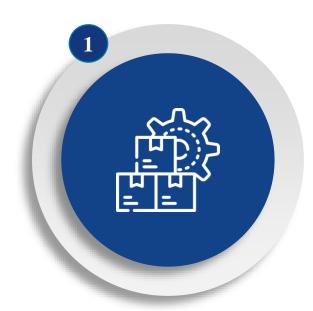
Increased Lead Times

The varying temperature profiles of various COVID-19 vaccines, further aggravated the logistical challenges

	Dosage	Storage Temperature
Moderna	2 Doses	-50°C to -15°C, 2-8°C (30 days)
Pfizer/ BionTech	2 Doses	-90°C to -60°C Purple caps: 2-8°C (31 Days); -25°C to -15°C (2 weeks) Orange caps: 2-8°C (10 weeks)
Oxford/Astrazenca	2 Doses	2-8°C (6 months)
Johnson & Johnson	1 Doses	2-8°C -25°C to -15°C
Gamaleya	2 Doses	2-8°C (3 months), -28°C (2 Years)
Novavax Novavax	2 Doses	2-8°C (6 months)
Sinopharm	2 Doses	2-8°C
Sinovac	2 Doses	2-8°C
Bharat Biotech	2 Doses	2-8°C

B Medical Systems also faced unprecedented supply chain challenges





Increased Demand For Products

- Various product volumes
- Temperature profiles



Shorter Lead Time Requests

• Countries required immediate delivery



Need for more headcount

HC requirement across departments



Increase in warehousing space

• Longer supplier lead times forced us to pre-order raw materials /stock piling

Infrastructure

Products

Raw Materials and Suppliers

Logistics Optimisations

HC

B Medical Systems optimised several levers to meet these challenges





New factory extension and optimisation of the existing production space. Capacity expansion by 2x for vaccine cold chain and 5x for ultra-low freezers



Several new products introduced to the market. Offered versatility to the customers by providing products that can store vaccines at different temperature ranges

Raw Materials and Suppliers

- Diversified the supplier base:
 Dual sourcing across every SKU
- Secured long term and consistent availability through blanket POs
- Selected the high runners and stockpiled the raw materials

Logistics

- Optimised the internal warehousing space (For raw materials)
- External warehouse for finished goods (Kuehne + Nagel)
- Digitalisation (Shipsta, EasyCargo etc)

Headcount

• HC grew by 61% during Aug'20-'21. Thanks to the local support

What worked for us?

- ✓ The support from the Govt of Luxembourg
- ✓ The Luxembourgish Business Ecosystem: Suppliers, Vendors and Partners
- ✓ Agile and Flexible supply chain
- ✓ Organisational Flexibility





medical systems

Thank You





Moderation by Hjoerdis Stahl, POST Deputy Managing Director

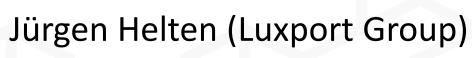
"Airfreight Innovation & Supply chain: Quo vadis?"



Achim Taylor (POST)



Richard Forson (Cargolux)



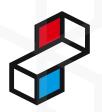


Christian Wilhelm (SHIPSTA)



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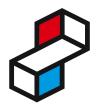
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Conference Recap



Malik Zeniti, Manager C4L The view of the Cluster for Logistics



Challenges of the logistics industry



Integrated last-mile delivery

- Customer-orientation
- · Omni-channel, cold chain, overnight delivery
- · Flexibility, Accuracy & Rapidity
- Prepared to react to volatility



Digitalization in logistics

- Process optimization through TMS
- Platform integration
- Logistics 4.0



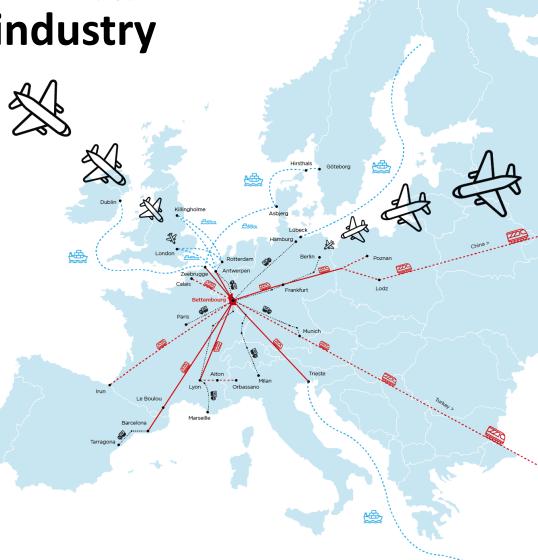
Sustainable logistics

- Low-carbon transport driven by international regulations (COP24)
- eco-friendly trucks and light trucks



Workforce and job market

- Training of talented logistics experts who can help shape this change
- Lack of truck drivers
- Increasing wages and competition for workforce, working hours, safety & security



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3rd Luxembourg –Poland Business Conference





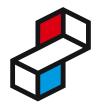


CLUSTER FOR LOGISTICS

	AGENDA
12.00 – 14.00	Lunch at the Polish Embassy in Luxembourg
14.30 – 16.00	Meeting with CFL Multimodal in Bettembourg
17.15 – 18.00	Registration
18.00 – 18.30	Welcome speeches
	Welcome by:
	H.E. Piotr Wojtczak, Ambassador of the Republic of Poland in Luxembourg
	Artur Sosna, President of the Luxembourg-Poland Chamber of Commerce
	Carlo Thelen, Director Chamber of Commerce of Luxembourg
	Keynote speech by:
	Representative of Minister of the Economic Development, Labour and Technology of the Republic of Poland
	H. E. Mr Franz Fayot, Minister of Economy of the Grand Duchy of Luxembourg
18.30 - 20.00	Panel discussions
	1st panel: European Green Deal - Contribution of a Dual-Hub Strategy between Poland and Luxembourg
	Introduction: Pawel Stelmaszczyk – Policy Officer, DG Move, European Commission, Brussels
	Moderation: Malik Zeniti - Director of Cluster for Logistics, Luxembourg
	Panelists:
	Paweł Stelmaszczyk – Policy Officer, DG Move, European Commission, Brussels
	Barbara Chevalier – Director Strategy & Business Development, CFL multimodal
	Teodor Łukasz Kula – Chief Business Development Officer, Done Deliveries company.
	2 nd panel: Logistics & Supply Chain challenges - digitalization
	Introduction: Philippe Hemard – Founder & Change Enabler, PHC
	Moderation: Marianne Hoffmann – Manager at Ministry of Economy of the Grand Duchy of Luxembourg, DG Industry, New Technologies and Research
	Panelists:
	Philippe Hemard – Founder & Change Enabler, PHC
	Prof. Dr Benny Mantin – Professor and the Director of the Luxembourg Centre for Logistics and Supply Chain Management (LCL) at the University of Luxembourg
	Rafał Brzoska – CEO, Interger.pl / Inpost Group
	Witold Ferenc - Founder, Open Checkout, Inc

20.00 - 20.30

20.30 - 22.00



Podcast

Logistics Conversations

C4L Podcasts Logistics Conversations









Managing Partner Sourcify











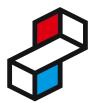








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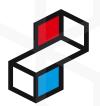


12 Podcasts in 2021

New Podcast "Nachhaltige Logistik im Merterter Hafen" (German)



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New Members

Following companies have acquired a C4L membership for 2021



Porcelaine mfg.

& trade

Company Members



Premium Members





Vaccine coolchain & protectiorProcurement process optimization



Buildings for Business



Warehouse and Parking Buildings **CLUSTER FOR LOGISTICS**

and change management



Performance improvement



Road transportation & logistics



Global container shipping company



Express solutions



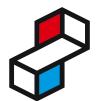
Logistics, Air Freight, Sea Freight, Time Critical, Road



Lawyer company



Fulfillment Service



Green Logistics

Lean and Green Awards 2021







LE GOUVERNEMENT
DU GRAND-DUCHÉ DE LUXEMBOURG
Ministère de la Mobilité
et des Travaux publics

Département de la mobilité et des transports

CLUSTER FOR LOGISTICS

Fit for 55



Background Information

In July 2021, the Commission presented the '**Fit for 55 package**' – a set of proposals and initiatives whose aim is to revise and update EU legislation to align it to the EU's 2030 and 2050 climate goals.

The package was presented to EU environment and climate ministers at an **informal meeting under** the Slovenian presidency on 20-21 July. Ministers welcomed the package and exchanged views on some of its elements. EU ministers exchanged views on the proposed package during an **informal meeting** in Slovenia in July 2021.

This page includes information on:

- what the Fit for 55 package is
- what the package includes
- the role of the Council

Fit for 55 (background information)



Fight Climate change with Technology: Ecoliners



Example from Trier to Mayen: "Aus 3 mach 2" on <100 km Cardboard manufacturer with multiple plants in D,NL

- Saves 60-80 000 €uro per year with one Eco-liner
- Saves 32'000 kg CO2 per year or 15-25% CO2
- Saves 10'000 | of Diesel /year

Video www.c4l.lu/ecoliner



ER ▼ POE

CAST •

SWL▼ L

LEAN & GREEN ▼

▼ YOUNG PROFESSIONAL

MEMBER

EVENTS •

"AUS DREI MACH ZWEI" – EINE NACHHALTIGE CO2 MINDERUNG AUF KURZSTRECKEN OHNE ALTERNATIVE

Das Beispiel des Einsatzes eines Lang-LKW der Fa. Brohl aus Föhren im Video ist frappierend. Der umwelffreundliche Eco-liner oder Lang LKW mit bis zu 20% CO2 Einsparung kommt in Deutschland, Belgien und den Niederlanden dard zum Einsatz, wo keine umwelffreundlichere Alternative besteht. Der LKW- Föhrer-Mangel wird damit etwas erleichtert und die CO2 Emissionen nachweislich nachhaltig gesenkt und damit die Wettbewerbsfähigkeit des Handels und der Industrie unterstützt. Die Industrie und Logistikbranche plädiert wie in Belgien oder Deutschland, für eine selektive Zulassung des Einsatzes von Lkw mit einer Länge von 25,25 Metern auf einer Positiviliste für Kurzstrecken unter 150 km oder mit einem Multimodalen Hub als Ziel zu prüfen. Die Regierung in Luxemburg steht mit dem europäischen Einf-for-55 Programm kurzfristig vor einer Mammutaufgabe und genause in Zugzwang wie die nächste Bundesregierung.





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Investments into warehouses & Solar Energy Eurohub Center Contern

Contract Logistics Luxembourg

Campus Contern



Contern 1

26.000 sqm

Multi-Customer site

Refrigerated & Pharma X-dock

24/7 Emergency Spareparts activites

Full service (Air, Sea, Overland,

Contract & Integrated Logistics)





Contern 3 20.000 sqm

Contern 2

46.900 sqm Racking & mezzanine setup New building since 2017 Tapa-C compliant Oversized & Custom pallet capabilities (up to 25 Tonnes)

+700 Specialists 10 km To Lux Airpoirt

Global Logistics

92.000 sqm

Locations



CLUSTER FOR LOGISTICS



Investments into warehouses Eurohub South Bettembourg Dudelange

Transalliance Luxembourg



LOGISTICS HUB LUXEMBOURG

EUROHUB SOUTH – A NEW MULTIMODAL LOGISTICS PLATFORM



Nouvel entrepôt multi clients 20 000 m² Disponible Septembre 2022

Entrepôt multi clients 15 000 m² E-commerce Industrie Cosmétique 40 FTE







Siège social 2 500 m²

Freight village:

Over 200'000 sm warehouses for value adding activities

Investments by Arthur Welter, RAK, CFL mm, Transalliance

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Cluster for Logistics Luxembourg

Workforce and Jobmarket

DT Logistics Program since 2015



Schools

- 1. Lycée Technique de Bonnevoie
- 2. Lycée Technique de Lallange



External Logistics Experts

C4L employs in collaboration with the MENJE 4 external logistics experts which give the following courses in the program:

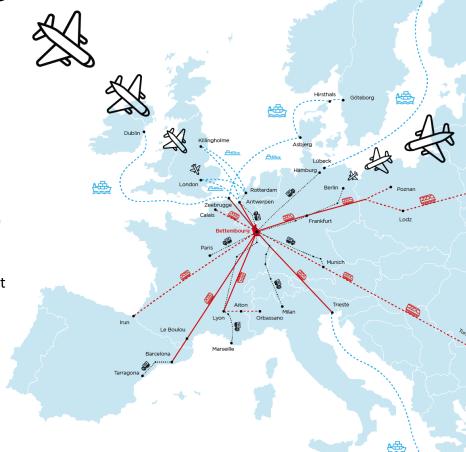
- Route
- Maritime
- Aérien
- Rail
- Transport combiné



DT Logisticians

Profile of a DT Logistician:

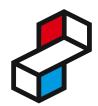
- Transportation Planning
- Warehouse Management
- Customs clearance
- _ ...



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Find additional information about the DT Logistics Program: https://www.winwin.lu/

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New Talents

New Logistics Technicians were awarded in October 2021

We love logistics Best DT Logistics 2021





Philippe Scholten Logistics Development Advisor Knowledge sharing & Green Logistics



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A big thank you to our partners























































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