

SESSION DEBRIEF

Supply Chain 2040.

Debrief of the discussions.

EVENT

BVL Supply Chain CX 2026,
Berlin

DATE

21 October 2026

HOST

Knut Aliche



Machines will take over the functions. *Humans keep the accountability, the judgement and the bill for resilience.*

01

ARTIFICIAL INTELLIGENCE

Planning software will be built, not bought.

- Companies prompt their own planning tools and plug them into the ERP; the data core stays decisive.
- Planning and execution merge. Agents act within an approval envelope, humans release the strategic calls.
- The edge moves to speed of adoption, product innovation and service.

02

RISK, RESILIENCE & GEOPOLITICS

Nobody can switch suppliers in 90 days.

- The peace and efficiency era is ending. Single sourcing gives way to alliances, diversity and breadth.
- Regional and transatlantic sourcing costs money and eats the savings automation creates.
- Think the unthinkable today, including a major conflict in Europe.

03

SUSTAINABILITY & DECARBONIZATION

Sustainability returns through the price of fossil energy.

- Rising fossil prices trigger a self-accelerating shift to renewables and circularity, with or without regulation.
- Scarcity and conflicts over raw materials make local circular economies the economic default.
- End-to-end information management becomes a reporting prerequisite.

04

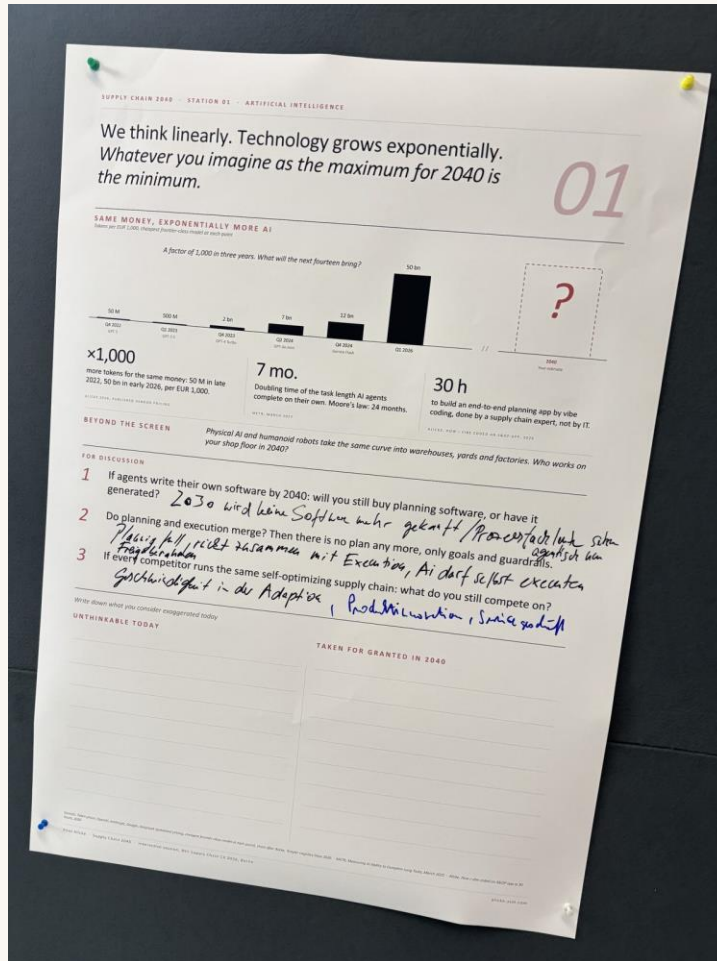
PEOPLE, AGENTS & ORGANIZATION

Agents can run the functions. Accountability stays human.

- Purely functional work, from planning to execution, can be done fully by agents and robots.
- Accountability cannot be split: someone must answer for decisions, if need be in court.
- Creativity stays with people, amplified by AI. Open question: AI cost and model monopolies.

Source: Group presentations at the session and annotations on the four flipcharts.

By 2030, planning software is built, not bought. *Speed of adoption becomes the edge.*



The flipchart after the discussion



The group presenting

Source: Group presentation at the session and annotations on the flipchart. Quotes in German as written on the poster.

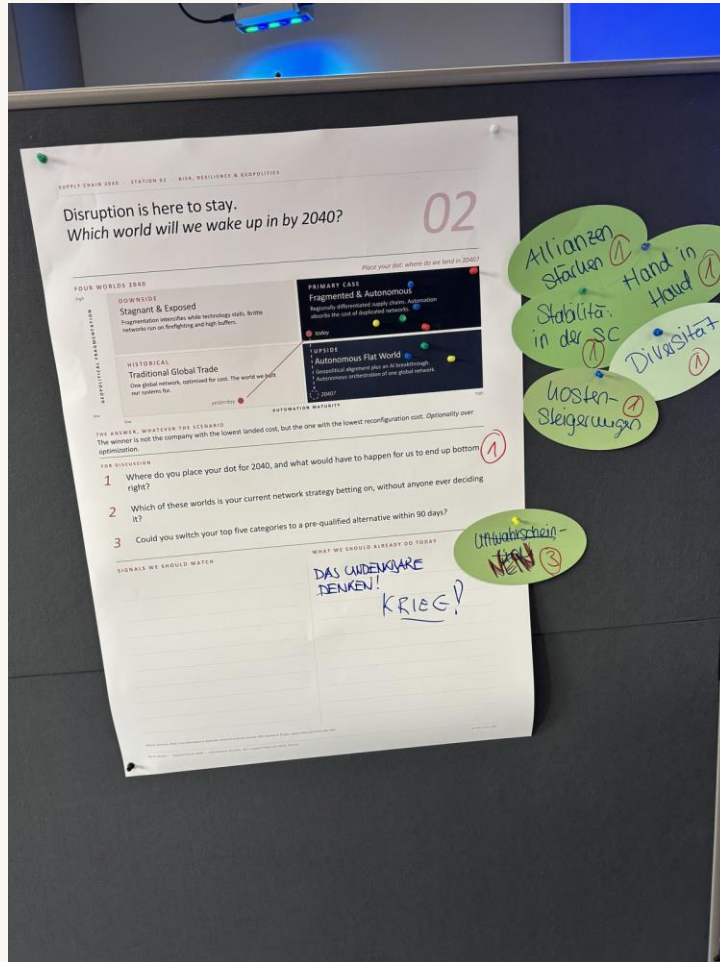
MAIN MESSAGE

The group took the poster's first question literally and answered it in ink: "2030 wird keine Software mehr gekauft". Process experts build agentially.

WHAT THE GROUP SAID

- This is already happening: one company bolted an AI-built planning module and an MES module onto its ERP via API, together with a Munich startup.
- Planning collapses into execution. AI may execute on its own within an approval envelope (Freigaberahmen); humans validate and release where investments are at stake.
- What you still compete on: speed of adoption, product innovation funded by the savings, and service for complex products.

No supplier switch in 90 days. *Resilience has to be built before the shock.*



The flipchart after the discussion



The group presenting

Source: Group presentation at the session and annotations on the flipchart. Quotes in German as written on the poster.

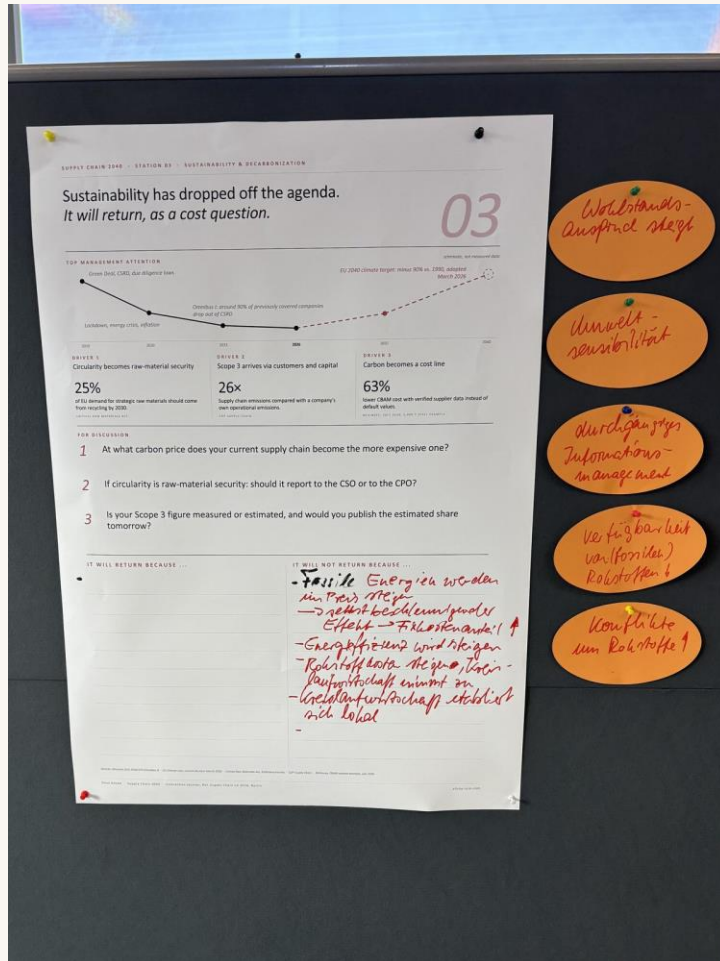
MAIN MESSAGE

Dots clustered on the high-automation side of the matrix, split between Fragmented & Autonomous and Autonomous Flat World.

WHAT THE GROUP SAID

- The economic model built on peace, stability and efficiency is ending. Sticky notes: strengthen alliances, hand in hand, stability in the supply chain, diversity.
- No more single source: alternatives must be designed in from the start. Regional or transatlantic sourcing raises cost and absorbs the savings from automation.
- What to do today: "Das Udenkbare denken". Prepare companies, families and the Bundeswehr for a major conflict in Europe.

Sustainability returns via the energy bill. *Economics beats regulation.*



The flipchart after the discussion



The group presenting

Source: Group presentation at the session and annotations on the flipchart. Quotes in German as written on the poster.

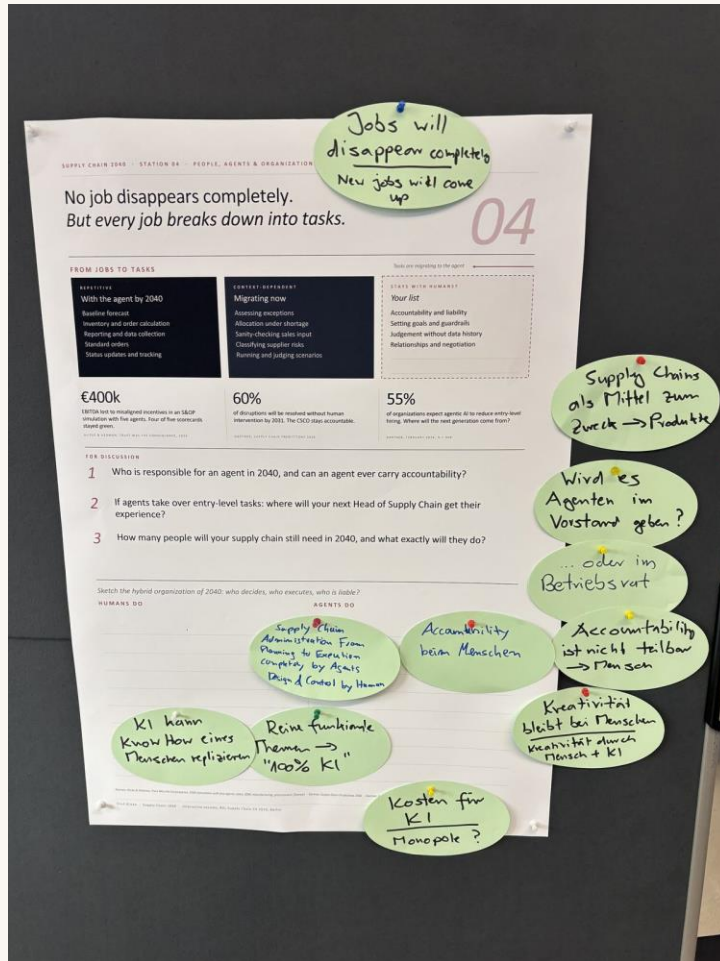
MAIN MESSAGE

Rising fossil prices start a self-accelerating effect: as users move to heat pumps, the last households on the gas grid carry its fixed costs, until everyone has to switch.

WHAT THE GROUP SAID

- Raw-material costs rise and availability falls, conflicts over resources rise. The pressure is strong enough that a CO2 price as a political signal becomes almost redundant.
- Circularity grows, and it grows locally, especially for Europe compared with China. Energy efficiency rises with it.
- Rising prosperity expectations and environmental sensitivity add pull. Reporting needs end-to-end information management across all parties.

Agents can run the supply chain. Accountability stays with a human.



The flipchart after the discussion



The group presenting

Source: Group presentation at the session and annotations on the flipchart. Quotes in German as written on the poster.

MAIN MESSAGE

Supply chains are a means to an end: clothing, food, shelter, warmth, medicine. If agents and robots deliver the bag of gummy bears, customers are just as happy.

WHAT THE GROUP SAID

- Supply chain administration from planning to execution can be done completely by agents. Design and control stay with humans. Purely functional topics: "100% AI".
- Agents on the executive board? No: someone must answer for decisions, if need be in court. Supporting agents for the works council are conceivable.
- Creativity stays with people, amplified by AI. Open issues: the true cost of AI and dependence on a few model providers. One note pushed back: jobs will disappear, new ones will emerge.

Group 1 saves the money.

Group 2 spends it on resilience.

01 How much of the automation dividend are you prepared to reinvest in redundancy, alliances and pre-qualified alternatives?

02 Which decisions will you let agents execute on their own, and who signs for them when they go wrong?

03 If energy and raw-material prices drive circularity anyway: is your network ready to source and recycle locally?

Thank you for a great session. knut@alicke-scm.com