In one sense, the traditional role of the Freight Forwarder has not changed for many years. Importers and exporters alike have relied on their expertise in the ways of the world to facilitate trade and logistics. To do this, the freight forwarder needs depth of knowledge on the regulatory climate, the subtleties of compliance, as well as a working knowledge of events on the ground as goods travel.

The climate of global trade, however, is changing—growing more complex—as governments and industry groups become more stringent in their requirements.

New automated filing, new competitors, new trade lanes and technology advances challenge the traditional customs broker and freight forwarder business model going forward.

Many freight forwarders have some fundamental questions as they contemplate the road ahead. What will we provide our customers in the future? How can we continue to grow and win business—profitably? Even with the ever-changing dynamics of global trade, how can we stay ahead of our customers’ requirements, yet reduce costs? How can we differentiate ourselves, stay ahead of competitors and ensure customer loyalty over the long term?

These and other issues were explored through interviews with customs brokers and freight forwarders. Their insights expose the choices that must be made as well as point the way to the road for forwarders’ success.
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About this paper:

Data and insights for this paper came from interviews with international freight forwarding/customs broker organizations; ChainLink Research’s logistics and manufacturing outsourcing survey; and Business Priorities Research, where participants responded on their needs and spending priorities.
The Crossroads: Introduction

This is an unprecedented time in the world of global trade. We know that almost every product has content from far-flung places. But now, traveling with even the simplest item is a plethora of regulations governing its manufacturing, movement, and trade. Keeping pace with the various 159 trade countries and hundreds of regulatory bodies, and the thousands of NGO trade and industry associations is a responsibility importers have often dismissed at their peril or outsourced to ‘the professionals.’ But no more. Without accurate filing, the goods won’t move.

In another sense, the job has gotten easier. Importers have become more knowledgeable about previously exotic trade lanes. Many have developed a sense of self-confidence about managing their global trade and a growing understanding of the role of compliance.

Markets also have grown as developing economies have created many new enterprises that import/export and that now require broker/forwarder services. Yet freight forwarders currently find themselves at a crossroads. Competition for business has gotten tougher: integrated carriers have developed services or outright bought their way into the customs brokerage business. This is tough competition for the ‘focused’ brokers/freight forwarders, who have honed their skills and expertise in specific markets for decades.

Figure 1: Customs Brokers/Freight Forwarders at the Crossroads

Today even the smallest customs broker has access to technology and content, so they can provide customs filing and clearing for their customers. Clearly, the old world of the traditional customs broker’s value proposition will not long suffice as a sales pitch to importers and exporters.

At the same time, the compliance mandates have grown. There are ever-expanding regulations, government scrutiny, and, of course, added customer compliance. Governments have been working to further automate and make accessible to all traders and their emissaries simpler and more consolidated
communications and filings. The European Union implemented the European Customs Information Portal. The US is following with its version, the Automated Commercial Environment (ACE), which will be enforced for importers by 2015. And Japan will also implement ARS in 2015.

For most organizations, service providers are the gateway and the link into these new systems. ACE is therefore an opportunity for US customs brokers. Firstly, it will reduce some back office administration and increase productivity for the broker and forwarder, allowing them to serve more customers, who have become more compliance aware. But there are also strategic benefits, as effective data collection can become the gateway for enhanced services and integration with the customer.

But this is not just the story of regulation. Managing trade today brings together a confluence of skill sets within the customer’s organization. Thus, the service provider needs to mirror these enhanced roles.

Customs, competition, and complexity represent a defining moment—a crossroad—for the intermediaries: freight forwarders and brokers. What will our business model be in the future? What will our customers require of us? How can we compete? What will technology contribute to our competitive position? Seeing down the road and then choosing the way ahead is the task at hand.

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**ACE**

Though ACE will simplify import and export filing, global trade is still a complex task requiring expertise which includes understanding Intellectual Property rights, trade restrictions, specific tax and duties, import quotas and more. Importing to the US, unlike other trade zones, will probably not reduce the role of/need for Customs Brokers.

Today, around 50% of all trade documents are manual. Many companies still rely on paper-based processes including shipping manifests, purchase orders, bills of sale documents, B2B communications, and their customs documents. This will need to change—and fast.

ACE is a catalyst to think about broader automation of global transportation processes and product information.

Even with electronic filing of the customs documents, that is no guarantee of entry. North American governments have passed, though implementation is slow, more intense inspections of cargo. And they are stepping up audits to ensure accuracy in harmonizing codes, and confirming that a physical shipment matches other data like commercial invoices, bills of lading, and so on.

ACE is surely a step forward in simplifying the complex world of global trade. But there is more to do.

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1 Of course, automatic filing makes the government’s job easier, reducing administrative costs and freeing up agents for other roles and the ability to inspect/audit more freight.

2 From logistics, risk management to the new role of Chief Responsibility Officers, to Supply Chain Risk Manager and so on.
Becoming the Business Partner

In a competitive climate, customer service—that special relationship—is foremost in winning and maintaining business. Most customs brokers pride themselves on the relationships they have established over decades. Considering the predominant question from customers—what’s this going to cost me?—puts service providers under intense pressure. As one freight forwarder asked rhetorically, “How can we be a premium service and yet be cheap?” Importers are more sophisticated about global trade and want to know the benefits they may derive in the relationship (with customs brokerage as the table stakes, but not the only service they require). Customers do want seamless supply chains, reduced risk, reduced sourcing costs, ensured/sped-up clearance, and yes, audit/fine avoidance. They expect to gain all these services from the service provider—at the right price.

In order to win and keep business, the broker/forwarder needs an inside track on the customer’s needs—both implicit and explicit. The insights required to provide a higher level of service and the information required to find the cost savings that customers require can be gained as a partner, rather than just an order taker.

The Partnership—Getting in the Inside Track

With today’s business complexity, it is often hard for the importer to see the total picture—especially the mid-size importer who may not have the resources to keep feet on the ground in supply markets, or have complete knowledge of the carrier market. The freight forwarder has more presence and insight on these dynamics. “In order to support customers today we have an end-to-end view of their freight from the PO to final delivery,” Omnitrans’ Blair Katz, Executive Vice President, told us.

Forwarders, therefore, require a richer platform of technology to provide that broader service. Not only should the information environment provide that end-to-end view of commerce—procurement, agreements, final delivery—it should allow the forwarder to find ways to optimize the process. Forwarders can provide that broader service and find ways to manage cost. Most importantly, this platform allows them the visibility required to enhance their value in the relationship.

Leveraging their insights, the freight forwarder can offer to design expeditious routes, advise on inventory policy to make sure that disruptions and delays do not impact the customers’ revenue and costs, and think outside the box about improved logistics approaches. With the pace of IT innovation, the customer is at a disadvantage if they do not have the information capabilities their competitors have. They look to their forwarder for this capability in order to create a more competitive supply chain.

Customer Insights

“In order to succeed and maintain the business with our customers, we have to be a keen observer of our customers’ strategy...”
James Kagawa, Vice President, IT, Kintetsu World Express
The Partner—A New Service Model

Partnership, as viewed by the forwarders we spoke to, is not a soft value. Kintetsu World Express views “customer partnership” as a direct contributor to shareholder value, “focusing on the goal of a true Global Logistics Partner,” for example. Apparently it’s working, since Kinetsu’s growth rates of ~10% annually, done organically vs. through acquisitions, are above average for the industry.

Talking strategy with customers is motivating, but execution is where the credibility is. As one leading freight forwarder stated, “No matter how much technology we implement, the customer still finds a reason to call us.” Call centers with experts at the ready to assist the customer are still in vogue—and will be for many moons ahead.

Freight forwarders today offer many services, as shown in Figure 2.

Figure 2: Customs Broker/Freight Forwarder Service Model

There is more to this business than being a ‘filer.’ No doubt there are last minute/tactical services. But according to our research, most end users were struggling with a broader set of issues—inventory management, cost management, and yes, customs. The information required to support those needs can give freight forwarders the inside track by providing them with the ability to learn more about the exporters’ and importers’ businesses. What they do with that knowledge and the path they choose going forward will point the way to those new markets, services, or customers.

Standing at that crossroads, the forwarder/broker needs a strategic game plan for the journey ahead.
Strategic Game Plan for Growth

That strategic viewpoint is resident knowledge that freight forwarder organizations generally have. Acting on that knowledge capital, though, and developing a strategic consultative business may take the organization down that different road to new capabilities. This road has to lead not just to growth, but also to profit.

Key Strategies for Growth

In our interviews with freight forwarders they cited these as key strategies for growth:

Trade Lane/Industry Leadership—being the de facto leader in a trade lane means having the expertise, the partnerships, and market presence—reputation, marketing, technology and so on—in the industry and commodities. Home turf expertise is usually the starting point. Omnitrans, for example, has a major focus on retail apparel for importing into Canada as well as the Canada to US trade lane. So they offer a broad spectrum of customs/freight forwarding, and specific services for apparel, such as remissions. Many industries have dynamic trade and compliance issues emanating from industry initiatives that a forwarder can advise on and provide services for.

Trade lane/commodity leadership dictates that one maintain accurate and timely customs content and technology. In addition, one needs to invest the time and diligence (and marketing) to stay current in the industry by attending the importer’s supplier meetings, conferences, and so on, for example.

Account Management—along with trade lane leadership come the personnel skills necessary to play that business partner role. These may be different people than the organization has today, or perhaps an opportunity for advancement for that eager, innovative staff member who sits in the call center. Applying their knowledge capital, the forwarder can provide critical consultative support to their customers based on the customers’ strategic goals, such as supply chain optimization and risk reduction. Goals for both importers and exporters may also include demonstrating their fair trade and sustainability practices. Examples are adherence to Dodd-Frank 1502/Conflict Minerals Rule; The Lacey Act; RoHS/WEEE, which restricts the amount of hazardous chemicals used in the production of electronics sold in the EU; support of fair working conditions; and other consumer priorities. Kintetsu highlights sustaining the environment as part of their own corporate values.

Supply Chain Consulting—assisting the customer in rethinking the supply chain model. Since the forwarder serves many customers in a trade lane, they often see the bigger picture and can anticipate the need for change. As a strategic advisor they can advise on the best places to locate facilities, source, or route shipments, redesigning the inbound chain to improve time to market and reduce costs.

Investing in New Countries/Trade Lanes—as the market moves, so goes the freight forwarder/customs broker. The forwarder may lead the customer into new markets through their understanding of supply

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3 The reduction or elimination of duties. More on CBSA Remissions

4 Industry methods and practices, societal pressure such as consumer advocacy and its impact on supply chain practices, government regulations, and importer compliance and information requirements.
markets and industry trends. If the forwarder wants a bigger portion of an importer’s business, they may need a presence in those markets where the importer will source from next year. For example, the shift in apparel manufacturing beyond China or Bangladesh to other countries such as Myanmar, which has recently had embargoes lifted; or finding new source markets to mitigate risk in volatile supply markets. Kintetsu told us they are focusing on leveraging their Asian presence and expertise and pursuing areas of growth in the emerging markets such as India, Bangladesh, Cambodia, and more established, but still growing, Mexico, Turkey and Brazil.

Hiring expertise may not always be possible. Often, then, acquisitions of other freight forwarder organizations, though expensive, may be the route taken. Most of the forwarders we talked with had at least one merger/acquisition in their history and often contemplate more. This not only provides presence, but new customers who come with the acquisition.

**Managed Services/Insourcing**—the road most taken, providing dedicated resources to support the customer’s trade program. On-site resources provide the advantage of relationship strength, but of course, the customer needs to pay for this.⁵

**Information Managed Services**—providing world-class information management support is critical—expected—to compete. A broker/forwarder system, unlike enterprise software, needs to serve multiple enterprises. A rich multi-party platform provides a variety of revenue opportunities for the forwarder, i.e., the technology and services they can provide to their customers, such as supply chain applications, reporting, and analytics.

Utilizing IT expertise, a managed service is a fee-for-service model, where the forwarder can implement, integrate, host and/or provide ongoing business support such as data management and reporting. Playing a more strategic role, the forwarder can monitor processes and information to improve performance. These types of managed services help the customer save costs on their own operations.

**Logistics Cost Saving**—once a good information picture is in place, customers can rethink their routing to save money on taxes, duties, and transportation. In ‘high compliance’ sectors there is the ability to comply with the importers’ routing guides, labeling, and other requirements, all to improve supply chain effectiveness, and most importantly, avoid chargebacks. Forwarders can also offer these as an additional service to support exporters.

Now the question arises: how are forwarders going to ‘pay’ for these investments? Most organizations not only turn outward, to increasing sales, but inward, to process and operational performance improvements to find answers.

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⁵ Of course, following a customer into a new market is a lower-risk approach than investing ahead of a trend.
Operational Excellence for Profit

The above builds presence and depth into the forwarder/broker business. Yet operational excellence is what builds and sustains reputation. While operations is serving the customers well, the sales team is out competing for new business. Beyond stellar service, presence, and relationship, brokers/forwarders still have to compete on price and yet be profitable. Customers are looking for a total value proposition—price and service—as well as how the forwarder will reduce their logistics costs.

Productivity is the road to profits in that highly competitive environment. The broker business is all about people and their expertise, and putting that expertise to work—productivity. Productivity not only means having all the right information and processes (reports, screens, systems and up-to-date data) at the ready, but having employees with the knowledge to deal with their customers’ complex trade and transportation challenges. Technology today is the fusing of data, processes, and content. The user is not left spending hours searching for the regulation and guidance to ensure accurate filing, load tending and so on.

Effectiveness is the path to profits. Productivity also means effective management of the shipment so all the moves happen according to plan. A solution with end-to-end visibility allows workers to see shipments and issues if things do go wrong, and work quickly to address those issues.

Rich information access means working capital and faster cash cycles. All the administrative activities and information flows are correct (systems generate the correct documents by shipping mode, trade lane/port of entry and so on) so that all the parties get paid promptly without chargebacks and disputes. The fewer errors and more visibility, the better the cash flow.

Figure 3: Partnership is Strategic and Operational

This all sounds great, but it won’t be accomplished without confronting some major challenges in how business and systems operate today.
Challenges

The choices in the crossroad do not come without hard decisions and coping with dangling issues. In our interviews, freight forwarders pointed out challenges that exporters and importers need to consider and resolve.

Multi-process/Multi-party Integration

In spite of technology innovations, the ability to integrate across trading partners is crucial, yet is still quite difficult. Many importers use several service providers, since they operate in multiple trade lanes. The challenge, since each business (exporters, forwarders, importers and carriers) has its own systems, is that each party may only have fractional data and thus, a partial view of the process.

More often today, users are relying on the forwarder—the master coordinator—to provide the end-to-end view. However, in the path to expediency, the customers frequently provide minimal data and, often, not in a timely way. (Today, shippers and importers are still mostly responsible for the data accuracy of their products, orders, and so on). This is the hurdle that many organizations are seeking to overcome today with logistics networks. Integrating the information between the various tasks and systems can provide visibility as well as speed up the process. We will discuss this option further in the next section.

Technology—the Competitive Advantage

We are using technology more and more to distinguish ourselves from the competition.
Blair Katz, Executive Vice President, Omnitrans

“Having a filing system today is not unique, but having the ability to provide customized, flexible technology that is integrated into our customer’s Supply Chain is unique. This allows us to discover ways to help our customers become more efficient.”
Stephen Venturini, Director of Operations, Omnitrans, Inc.

Getting Ready for ACE: It’s More than a Chore—It’s a Strategic Opportunity

Rather than seeing ACE as a loophole to reduce the work and revenue gained by Brokers and Freight Forwarders, see this as a chance to enhance the relationship, improve revenue, and, at the same time, improve the customers’ performance.

Service/Benefit opportunity for Customers:

• Address day-to-day challenges:
  • B2B integration
  • Data Management clean-up and process improvements to align transactions and gain visibility
• Benefits:
  • Gain duty reduction
  • Customs data—eases outbound and avoids shipping to denied parties
  • Get green lane status
  • Improve inbound/receiving accuracy
  • Reduce cash cycle times
  • Reduce fines, broker fees, and chargebacks
  • Integration to other transportation systems
Accurate data can enable other transportation scheduling and optimization efforts.

• Advise/support on strategic decision-making:
  • Re-assess transportation trade inbound network
• Benefits:
  • Reduce time to market
  • Improve inventory cycles
  • Reduce customs/import duties
  • Take advantage of duty drawback
  • Improve inter-carrier/intermodal coordination
  • Reduce charges by carriers for delays, demurrage

• IT managed services:
  • Host technology platform and broad-based supply chain solutions
• Benefits:
  • Reduce customer’s total cost of ownership
  • Provide current technology competencies and capabilities
  • Use data to become more agile and competitive
Transformation through Technology

One huge catalyst for growth is technology. Technology leverage was cited by the smallest customs brokers and the largest multi-service freight forwarding organizations as absolutely central to their competitive position, productivity, and profit.

Integration Central to Success

Even the smallest businesses, from Indonesia to Africa, can access electronic information from the Internet. Large or small, we are all part of the Digital Age. Yet even the largest companies have disparate business and information processes that limit their visibility and ability to manage their supply chain more effectively.

From the customer side, many companies are ‘logging in’ to multiple portals and using multiple systems to support the purchasing, sales, carrier selection, customs filings, and so on. This leads to a poor view of what the total delivered cost will be. A cost calculator may be an interesting data point, but often does not provide the true picture of what it will take to see the shipment through. Most important, though, is the lack of visibility for all parties involved in the process. Poorly coordinated handoffs lead to increased cost, late, damaged, or lost freight.6

The word ‘integration’ was used so often in our conversations that it became central to our thinking about the road ahead for forwarders. Outmoded approaches, though, will not close the data gap. An opportunity exists to gain the full picture of the process to further performance improvements by leveraging a platform approach and blending both enterprise applications and multi-party information.

Global Platform

Today’s technology stack goes far beyond a customs broker’s filing functionality. And again, with ACE, that backend streamlining improves the filer’s productivity. But accurate data for filing is the result of many more things being accomplished across global processes. Thus, a broader picture of the technology solution should be considered.

Importers and shippers today want visibility as well as all the performance advantages we discussed above. The technology community has also been going through a parallel journey to provide solutions to support this wider view. In Figure 4 we show a broker/forwarder enterprise solution. It not only enables

Integration

“Today data collection needs to be much earlier in the process to avoid risks later at the border. Historically, Freight Forwarders began the data collection process as the shipment was being built; today, the forwarder needs to capture the initial PO data and see change orders through to the final shipment. This integrated view of the process provides us a window into the customer and assists them with other supply chain needs.”
Stephen Venturini, Omnitrans

Global IT Platform

“Some emerging economies are far better facilitators of global trade. Even though roads may be poor, the mobile data network exists, so we can set up new locations very quickly. Our global trade applications hosted in Japan or the US, so our customers with an internet connection have access to all their trade information, documents and transactions...”
James Kagawa, Kintetsu World Express

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6 Un-shepherded freight can experience slow processing through customs, delays/late charges in ports, delays in return containers/demurrage, freight containers in a long queue waiting for the next stage in the relay, and so on.
the customs processes, but often, can be the customer’s own system of record for their global logistics processes. In essence, the forwarder has to connect all the carriers to one another. Carriers are notorious for doing a poor job of sharing information. Thus a neutral network for logistics becomes the de facto solution today for multi-party synchronization and visibility, even if organizations still retain some of their own systems.

Customs Broker/Freight Forwarder Solution

Visibility at first inception of order through to final delivery

The Broker/Freight Forwarder Enterprise Solution is based on multi-party communications, and yet serves as the forwarder’s own system to support the administrative and financial activities involved in running the business. The cloud approach reduces the total cost of ownership of technology. Most importantly, it enables forwarders to create a flexible foundation for new types of revenue models with their customers from long-term agreements to one-off shipments. Finding, onboarding, and integrating new customers is no longer an obstacle, hence, improves service and cash velocity for the forwarder’s business.

In the logistics field, branded portals, and community platforms play a vital role in leveraging the technology investment. These not only enhance the brand and market presence of the service provider, but create a destination site, keeping customers as well as visitors coming regularly to the site.
The Road Ahead: Conclusion

No doubt, some of the concepts here represent investments for the forwarder, but they also offer an increased business opportunity. Though customs brokers don’t often think about their brand, now is the time to start. The market is intensely competitive and the forwarder may not be able to wait.

Customs brokers can elevate their relationship with customers by being the ‘first to advise’ the customer of the changing regulatory climate by providing insightful and accurate interpretation that demonstrates the impact on the customer’s business. This is far beyond just providing press clippings. Brokers build their reputation by being in the know, as well as with their execution of the trade process.

Having that rich content and leveraging the web is critical for retaining current customers and for finding new ones. Getting on a potential customers’ short list is often the result of their web searches. It is not enough for forwarders to maintain their own website; being a member of the logistics community where prospects seek expertise becomes critical in today’s game. The freight forwarder’s website/platform should become the destination site for the customer—where they can not only transact, but also gain knowledge.

Consistently, manufacturers and retailers told us that they expect ever more technology and business expertise from their service providers.

This then begs the question on the service provider’s state of readiness today, not just for the latest change like ACE or new trade agreements, but to respond to that competitive landscape. Are the investments in people and technology in line with the market requirements?

Investment in growth is the road ahead. Detours or rest stops are not an option in a competitive market.
Addendum

ACE—Are You Ready for This?

The complexities of managing global trade are covered by three chains—product, cash, and information movement. In today’s world, nothing moves without the information. Creating and managing the information to achieve all this is no small feat. The adept and informed enterprises know information can be used to adroitly manage their global supply chain strategies.

Governments are increasing the requirements for those who want to enter their markets. North American legislators are implementing country-specific regulations that impact imports. The Food Safety Modernization Act and the Canadian Food Inspection Act both continue to be amended as consumer awareness grows and trade negotiators work to balance open trade with the needs of domestic producers. The Frank-Dodd Act 1502, governing conflict minerals, went into effect in 2014; as well, the historic Lacey Act that prohibits the trading and importing of endangered species continues to be amended as consumers and government agencies such as the US Fish and Wildlife Service add species to the list. Even within the local NAFTA countries there are restrictions of certain often mundane products from shoes to wheat. 90% of everything.

For support processes for US entrée, another critical date is rapidly approaching. The automation of customs filing, Automated Commercial Environment, ACE, will be required starting in 2015. But hundreds of companies have already taken advantage of the pilot program and are gaining the expertise to ensure compliance on time.

The ACE goal is to ultimately provide a ‘single window’ for multiple import functions from reporting through payment. That single system also includes combining the reporting requirements from multiple government agencies including the FDA, USDA, Consumer Safety Protection Agency, Federal Trade Commission, and the U.S. Fish and Wildlife Service, to name a few. “Responding to the very real challenges of globalization as supply chains become more complex is a top priority for the FDA,” said FDA Commissioner Margaret A. Hamburg, M.D. 10

Operating environments differ by trade blocks. ACE will not be a replacement for the customs broker. In the US, the broker will be the ‘official interface’ to customs filing. However, a large percentage of customs brokers have not converted, though many are working with their software providers and have implemented pilot phases. But now the deadline is here. Not only is electronic-only filing mandated, but Customs will pull the plug on all the legacy systems by the end of 2016.

Brokers who have not invested in technology will find that their competitive position will erode as they are unable to meet the productivity levels of more automated firms.

What About Small Traders?

World trade organizations, governments, and enterprises have been lobbying trade representatives from government and international customs agencies to simplify the process and paperwork. Automation not only will ensure successful trade, lower the cost of trade, speed up trade, but also allow many smaller entities and new-comers to be able to participate in global trade.

10 Automated Commercial Environment or ACE was not just developed as a convenience for importers, but as a way to ensure adherence to the advanced filing requirements of North American governments. Rail and Ocean inbound are required to comply as of 2015, and inbound trucking by 2016.

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7 And imposing penalties on those who fail to comply
8 An enticing title for a recent book on global trade/ocean
9 Note: C-TPAT, ACE, etc. are not just for air and ocean-bound trade.
References and Further Reading:

Kintetsu World Express

Omnitrans, Inc.

Descartes CUSTOMS Info

Descartes Webinar Series: More business and trade research shared here

Descartes Community

New Era of Business Cooperation—ChainLink Research

Canadian Border Services Agency

U.S. Customs and Border Protection—ACE Help

Office of the US Trade Representative: NAFTA

Ocean ACE—Descartes Systems

Customs Info about ACE—Customs Info’s site which has in-depth information on international trade as well as North American specific import and export compliance

European Customs Information Portal

World Trade Organization (WTO)
About ChainLink Research

ChainLink Research, Inc. is a Supply Chain research organization dedicated to helping executives improve business performance and competitiveness through an understanding of real-world implications, obstacles and results for supply-chain policies, practices, processes, and technologies. The ChainLink 3Pe Model is the basis for our research: a unique, multidimensional framework for managing and improving the links between supply chain partners.

719 Washington St., Suite 144
Newton, MA 02458
617-762-4040

Email: info@CLResearch.com
Web: www.ChainLinkResearch.com