

## **#20 Navigating an uncertain future**

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### **Key Takeaways**

- The Netherlands' role as a maritime logistics hub ("Gateway to Europe") is strategically important but increasingly uncertain, with China's influence expected to play a major role in shaping its future.
- Four scenarios highlight diverging futures based on globalisation vs. deglobalisation and China's role in European logistics, ranging from strong Chinese dominance ("Belt and Road Rules") to limited Chinese influence ("Own Region First").
- In scenarios with strong Chinese involvement, strategic dependence, politicisation of logistics, and reduced Dutch autonomy increase, while cooperation brings economic benefits but also significant dilemmas.
- Across scenarios, geopolitical tensions (especially US–China rivalry), lack of reciprocity, and growing Chinese state influence risk distorting competition and challenging EU cohesion and Dutch decision-making.

### **Policy Recommendations**

- Act proactively by anticipating both strong and weak China scenarios, rather than adopting a wait-and-see approach, to preserve long-term strategic autonomy.
- Maintain targeted economic and technological cooperation with China, while making new investments conditional on reciprocity and safeguarding against excessive dependency.
- Strengthen EU-level coordination and strategic frameworks to prevent fragmentation and ensure European strategic autonomy in maritime logistics.
- Enhance monitoring, investment screening, and competition policy tools, including oversight of Chinese influence in shipping, infrastructure, and data/logistics platforms (e.g. LOGINK).

### **Executive Summary**

This report examines China's influence on the Netherlands' maritime logistics hub function and how this may evolve in the coming decades. Commissioned by the Dutch Ministry of Infrastructure and Water Management and the Ministry of Foreign Affairs, it assesses future scenarios to support policy choices aimed at safeguarding the Netherlands' central position and strategic autonomy.

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The Netherlands has long served as the “Gateway to Europe,” based on its advanced logistics network and global trade integration. However, this position faces growing uncertainty due to geopolitical shifts, particularly China’s expanding role in global trade and logistics through initiatives such as the Belt and Road Initiative (BRI) and state-backed companies.

Four scenarios illustrate possible futures based on the degree of globalisation and China’s role in European logistics. In “Belt and Road ‘Rules’”, strong globalisation is combined with Chinese dominance, leading to significant influence over logistics flows and reduced Dutch autonomy. In “Belt and Road Limited”, globalisation weakens but China still maintains a strong position in European logistics, resulting in continued, though more selective, dependence. In contrast, “Back to the Nineties” assumes continued globalisation with limited Chinese influence, allowing European players to remain competitive. Finally, “Own Region First” reflects deglobalisation and protectionism, with China largely excluded from European logistics and reduced dependency as a result.

The analysis shows that strong Chinese involvement creates both opportunities and risks. Cooperation can strengthen trade, investment and technological development, supporting the Netherlands’ economic position. At the same time, it raises concerns about strategic dependence, politicisation of supply chains, and unequal competition due to state-backed Chinese firms and lack of reciprocity. Geopolitical tensions, especially between the US and China, further complicate decision-making for the Netherlands and the EU.

In scenarios where China plays a limited role, dependency risks decrease but so do the economic benefits of cooperation. Nevertheless, geopolitical considerations remain relevant, particularly in relation to security issues and the functioning of critical infrastructure.

The report concludes that the Netherlands must adopt a proactive and balanced strategy. Maintaining its leading hub function will depend on combining openness to cooperation with China, where beneficial, with measures to protect strategic autonomy, strengthen EU coordination, and manage geopolitical risks in an increasingly competitive global environment.