

**Manuel Siekmann**

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Band 269

## **Identification and Evolution of Future (Mega-) Trends in Logistics**

Strategic Relevance for Logistics Service Providers

Master's Thesis

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EUROPEAN BUSINESS SCHOOL  
International University Schloss Reichartshausen

# Thesis

To obtain the academic degree  
Master of Science

*Identification and Evolution of  
Future (Mega-) Trends in Logistics –  
Strategic Relevance for Logistics Service Providers*

Name: ..... Manuel Siekmann

Submission date: ..... July 9<sup>th</sup>, 2009

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## List of Abbreviations

1PL	First Party Logistics
2PL	Second Party Logistics
3PL	Third Party Logistics
4PL	Fourth Party Logistics
bn	Billion
BVL	Bundesvereinigung Logistik e.V. [German Council of Logistics]
CAGR	Compound Annual Growth Rate
CEP	Courier, Express, Parcel
DHL	Dalsey, Hillblom, Lynn
DVZ	Deutsche Verkehrs-Zeitung [German Transportation Paper]
EBS	European Business School
EU	European Union
EUR	Euro
GDP	Gross Domestic Product
IT	Information Technology
JIT	Just-in-time
LPI	Logistics Performance Index
m	Million
MIT	Massachusetts Institute of Technology
PR	Public Relations
RAND	Research and Development (Corporation)
RFID	Radio Frequency Identification
SCM	Supply Chain Management
SMI	Supply Chain Management Institute

SME	Small and Medium-sized Enterprises
TU	Technische Universität [Technical University]
U. S.	United States

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# 1 Introduction

## 1.1 Research Problem and Objectives

Globalization, complexity, and change are some of the terms in vogue in today's business environment. In this context, uncertainty has become a major issue for decision-makers, where being able to quickly adapt to a changing environment can make the difference between being a market leader and being insolvent (Chermack, Lynham, & Ruona, 2001, p. 7; Porter, 1985, pp. 445-446). Similarly, longer supply chains and fierce competition in a globalized and deregulated market, increasingly complex customer expectations, as well as innovative, changing business models are just some of the key challenges for today's logistics industry (Christopher, 2005, pp. 210, 228; Singh, 2004, p. 2; Straube, Dangelmaier, Günthner, & Pfohl, 2006, p. 8). Logistics as such has transformed over the last decades from a supporting, cost-absorbing function into a strategic factor with the potential, in a globalized and competitive environment, to be the decisive competitive advantage (Straube et al., 2006, p. 30). In this context, outsourcing to logistics service providers, which are more often seen as strategic partners by industrial or trading companies that concentrate on core competencies and try to achieve cost efficiencies, becomes increasingly important (Fabbe-Costes, Jahre, & Roussat, 2009, p. 72; Rabinovich, Windle, Dresner, & Corsi, 1999, p. 353). It is a commonly agreed-upon premise that, for service providers in the logistics sector, mere reacting will no longer be sufficient in the future. Instead, they will have to anticipate change and require management competencies to turn knowledge of potential developments into a competitive advantage (Baumgarten, Darkow, & Walter, 2000, p. 12). As Jung (2000, p. 21) pointed out, future-oriented designs of value chains with respect to logistics will be some of the predominant challenges of the upcoming decades.

Strategic planning, with its aim to predict the future in a singular and often rather short-term way, can contribute to future-oriented thinking but might not be sufficient alone (Chermack et al., 2001, p. 7). Recently, by utilizing methods of futures studies such as scenario planning, foresight activities, which previously were rather part of governmental policy programs, have become a part of the corporate world. According to Schwarz (2008, p. 237), in addition to an increasing number of corporate foresight activities, the strong managerial interest in the field of futures studies is reflected by a growing number of consultancies and think-tanks, a growing number of conferences, and numer-

ous management-oriented publications encouraging companies to initiate and develop future orientation and corporate foresight activities (e.g., De Geus, 1997; Hamel & Prahalad, 1994b; Yates & Skarzynski, 1999).

In the literature, there is an ongoing discussion on the context and relevance of futures studies (e.g., Bell, 2001; Masini, 2001). Much attention has been given to methodological approaches, either in the form of overviews (e.g., Fink & Siebe, 2006; Steinmüller, 1997) or by focusing on single approaches (e.g., Barber, 2006; Gordon, 1994b). A large part of the latter discussion is dedicated to the scenario technique (e.g., Bishop, Hines, & Collines, 2007; Gausemeier, Fink, & Schlake, 1998). Recently, authors have aimed at establishing theoretical links between foresight and corporate strategy (e.g., Gruber & Venter, 2006; Major, Asch, & Cordey-Hayes, 2001). This theoretical discussion is accompanied by a growing number of studies on corporate foresight activities, mostly in large companies, in the form of large-scale studies (e.g., Schwarz, 2008), focusing on case studies (e.g., Ruff, 2004), or both (e.g., Burmeister, Neef, Albert, & Glockner, 2002; Müller, 2008).<sup>1</sup> Only very recently, have small and medium-sized enterprises (SMEs) also been considered (e.g., Burmeister & Schulz-Montag, 2008). In the logistics field, future-oriented studies mostly have the objective to identify or evaluate new management concepts or technologies (Baumgarten et al., 2000, p. 12). Therefore, most future-oriented studies aim at identifying specific trends (e.g., Straube & Borkowski, 2008; Straube et al., 2006). Jung (2000, pp. 21-22) concluded that, with regard to the logistics field, both the scientific community and the corporate world show a distinct deficit of future orientation. This is specifically true for the question of how logistics service providers themselves deal with future challenges.

The identified research gap at this point is thus to embed future orientation based on theoretical considerations of futures studies and corporate foresight in a logistics industry, which is increasingly exposed to future challenges. This is done by systematically analyzing how mainly German logistics companies, across the logistics service industry, address future issues. Therefore, the empirical contribution of this thesis follows a practice-oriented research approach based on a standardized online survey and more profound semistructured interviews. The decision to use this approach is based on two considerations: First, from a futures studies perspective, Coates (2001) identified a lack

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<sup>1</sup> The studies mentioned here can be distinguished from studies on implementations in a governmental or policy context (e.g., Glenn, Gordon, & Dator, 2001, pp. 181-185).