



“Trend Research for the European Postal Sector in 2030“

Presentation of intermediate results of the scenario process

(1) The story so far...

(2) What's next?

01

The story so far...



The story so far...



Our
starting
point...

The story so far...



...is like
always in life:
To get an
answer, you
first have to
ask.

The story so far...



What possible futures
can we expect?
Which options for the
future do we have?



**The answer:
Scenarios!**

Why future research?



Remember:
Scenario planning
is not about
predicting the
future, it's about
preparing for
alternative futures!

The story so far...



Because if you have only Plan A, all the rest of the alphabet is missing ...

The story so far...



**What have we
achieved so
far?**

The story so far...



Initial question



What could
the postal
sector look
like in 2030?

The story so far...

 360 degree scanning of influencing factors



What are the factors shaping the postal sector's future development until 2030?

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The story so far...

Paris Workshop

Key Factors

Environmental Factors

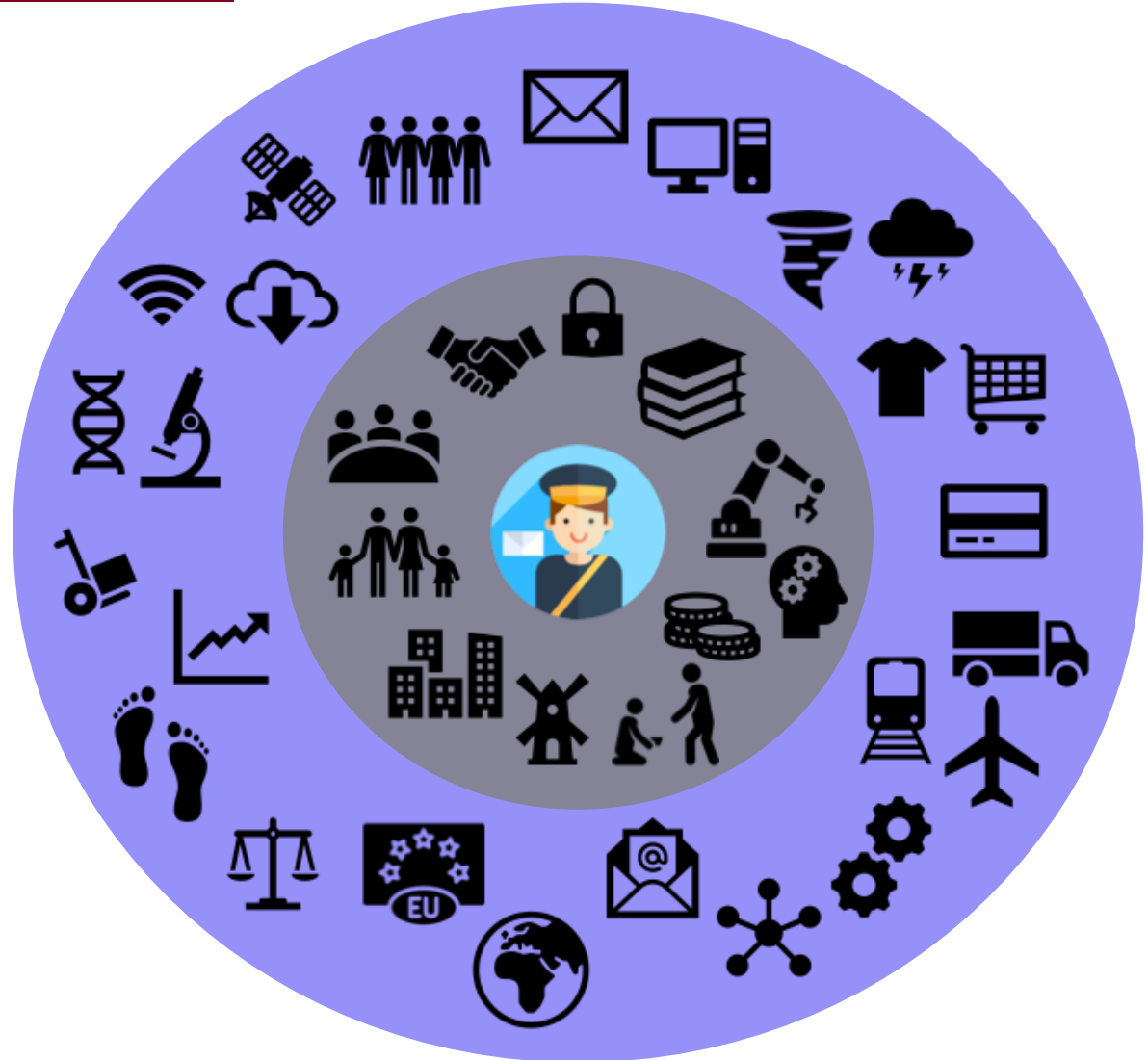
Assessment regarding impact/uncertainty

Key Factors

What are the most important factors shaping the postal sector's development until 2030?

Assessment regarding impact/uncertainty

Social Factors



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The story so far...

Result of Paris Workshop

Final Shortlist of Key Factors

	Communication patterns
	Consumption patterns and consumer protection
	Competition and regulation in the postal sector
	Economic development
	Innovation dynamics
	Traffic infrastructures
	Data management and infrastructures
	Changing world of work
	Change of (further) education systems
	Societal divide
	Climate change and ecological distortions
	Development of social dialogue





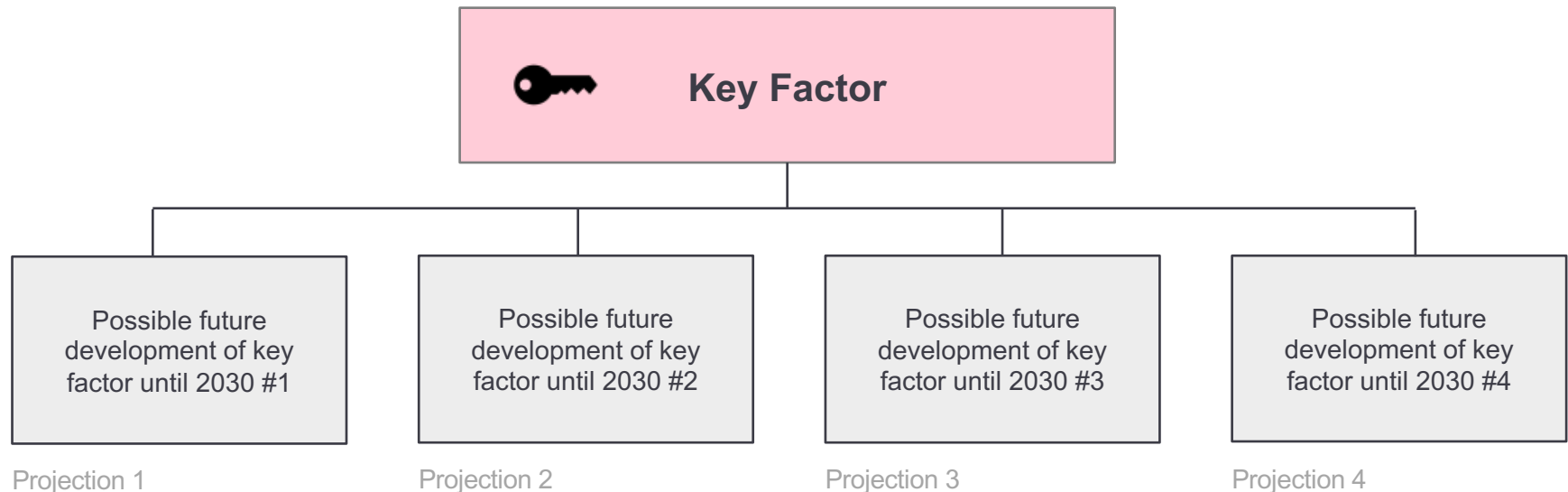
Bonn Workshop



Bonn Workshop

Guiding question for every key factor:

What are plausible possible future developments for this factor until 2030?



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The story so far...



Bonn Workshop



Bonn Workshop

The image displays a collage of workshop materials from the Bonn Workshop. The central focus is a whiteboard titled "POSTAL SECTOR EVOLUTION WORKING GROUP 'Trend research for the postal sector in 2030'". This whiteboard is divided into sections for "Key Factor" and "Definition", with handwritten notes and sticky notes attached. The "Key Factor" section includes "Climate change and ecological distortions" and "Traffic infrastructures". The "Definition" section provides detailed descriptions for each factor. The "Comments" section contains numerous handwritten notes and sticky notes, many of which are yellow and pink, discussing various aspects of the postal sector's future. To the right of the whiteboard, there is a section titled "Comments" with a list of handwritten notes, including "USO DETERIORATING", "REDUCED STANDARDS AND SERVICES", "STRONG USO", "NEW PLAYERS NOT SUBJECT TO SAME RULES (e.g. CBA)", "PERIMETER OF REGULATION NOT EXTENDED TO NEW PLAYERS", "CLOSE TO CURRENT SITUATION", "WHAT HAPPENS TO CURRENT CONDITIONS?", "NEW PLAYERS NOT SUBJECT TO USO", "NEW PLAYERS FLEXIBLE enough TO ADAPT TO USO", "DIFFERENCES BETWEEN THE CAR RAMPAGE OF NEW PLAYERS AND TRADITIONAL MAIL SERVICES", "CHALLENGERS ARE REGULATED HORIZONTAL REGULATION", "PERIMETER OF REGULATION EXTENDED", "ONLY COMPETITION REGULATION", "SERVICES STILL AVAILABLE BUT REGULATION CHANGES FREELY", "TRADITIONAL LIKE NOT BEST CHOICE FOR ACQUISITION PROCESS", "COMPETITION IS LOST BY EFFICIENCY AND TECHNOLOGY", "USO USED AS PROTECTIVE REGULATION", "PERIMETER OF REGULATION EXTENDED", and "SOCIAL ROLE OF POSTAL SECTOR". Below the whiteboard, there is a poster with the same title, "POSTAL SECTOR EVOLUTION WORKING GROUP 'Trend research for the postal sector in 2030'", which includes a table with "Key Factor" and "Definition" columns. The "Key Factor" column lists "Innovation dynamics" and "Traffic infrastructures". The "Definition" column provides detailed descriptions for each factor. The poster also includes a "Projection 2030" section with handwritten notes and sticky notes. The poster is branded with the "punkt" logo in the bottom right corner.

Key Factor	Definition
Innovation dynamics	Intensity (e.g. number of patent applications) and quality of the innovation activities of companies (e.g. highly disruptive technologies), average duration of innovation cycles as well as societal openness to technology and disruption.
Traffic infrastructures	The condition and density of transport infrastructure (roads, ports and waterways, railways and airports) against the background of high maintenance costs and the need for new infrastructure in view of transport means (incl. innovative new solutions), with particular regard to different needs along the value chain in the postal sector (urban/rural delivery vs. long-distance transport between hubs).

Projection 2030

Incremental change, incremental acceptance

Disruptive change, forced technological openness

Slowing innovation dynamics, technological scepticism

Good infrastructure in cities, mostly ailing in countryside

Infrastructure boom with high investments

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The story so far...

Morphological Box

Result of Bonn Workshop

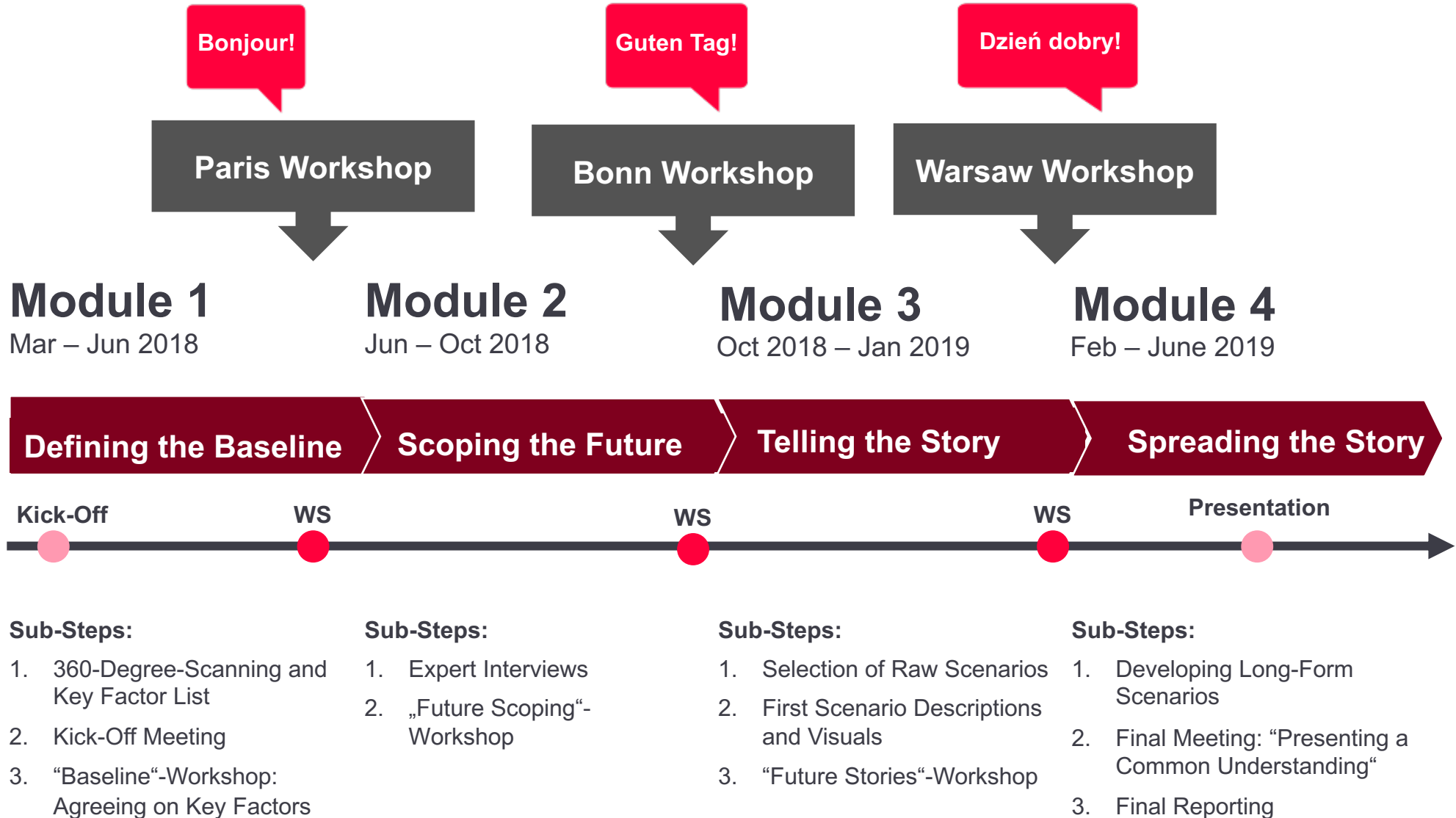


Communication patterns	Consumption patterns and consumer protection	Competition and regulation in the postal sector	Economic development	Innovation dynamics	Traffic infrastructures	Data management and infrastructures	Changing world of work	Change of (further) education systems	Societal divide	Climate change and ecological distortions	Development of social dialogue
Digital high culture	Mainly conspicuous consumption, low consumer protection	Strong competition (new players as leaders), reluctant regulation	New growth dynamics (average EU growth above 3%)	Incremental change, incremental acceptance	Ailing infrastructure due to underinvestment	Hyperconnected world, Internet of Everything	Hybrid working world, growing variations/differentiations	Low access, predominantly traditional structures	Growing societal divide and tensions	High temperature rise, rapid deterioration of ecologic conditions	Business as usual
Digital fragmentation, hybrid use	Mainly conscious consumption, high consumer protection	Strong competition (new players as challengers), high political will to regulate	Continuing growth path (average EU growth between 2% to 2.5%)	Disruptive change, forced technological openness	Lighthouse projects while other infrastructure is ailing	Mostly closed systems (Splinternet)	New work prevails, diminishing variations/differentiations	Broad access, evolution of traditional structures	Closing gap, new forms of coherence	Paris agreement world: containment of climate change, high regulation	Renewal and new forms of social dialogue
Digital fatigue	Mainly individualized consumption, low interest in consumer rights	Reduced competition (traditionalists with niche share), reluctant regulation	Slowed growth and stagnation in Europe	Slowing innovation dynamics, technological scepticism	Good infrastructure in cities, mostly ailing in countryside	Expanding digital gaps between countries and regions	New work prevails, growing variations/differentiations	Broad access, new approaches	Fragmented societies (differentiated living worlds), mostly tolerant	(Surprising) Mitigation of climate change, lower regulation	Deterioration of social dialogue
	Mainly service-oriented, high interest in consumer rights	Reduced competition (withdrawal of new players), high regulation	Worsening economic framework conditions, new economic indicators		Infrastructure boom with high investments				Fragmented societies (differentiated living worlds), mostly indifferent		End of social dialogue

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Timeline and Process



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Timeline and Process

Bonjour!

Paris Workshop

Guten Tag!

Bonn Workshop

Dzień dobry!

Warsaw Workshop

Module 1

Mar – Jun 2018

Module 2

Jun – Oct 2018

Module 3

Oct 2018 – Jan 2019

Module 4

Feb – June 2019

Defining the Baseline

Scoping the Future

Telling the Story

Spreading the Story

Kick-Off

WS

WS

WS

Presentation

DONE

WORK IN

PROGRESS

Sub-Steps:

1. 360-Degree-Scanning and Key Factor List
2. Kick-Off Meeting
3. “Baseline“-Workshop: Agreeing on Key Factors

Sub-Steps:

1. Expert Interviews
2. „Future Scoping“-Workshop

Sub-Steps:

1. Selection of Raw Scenarios
2. First Scenario Descriptions and Visuals
3. “Future Stories“-Workshop

Sub-Steps:

1. Developing long Form Scenarios
2. Final Meeting: “Presenting a Common Understanding“
3. Final Reporting

02

What's next?



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What's next?

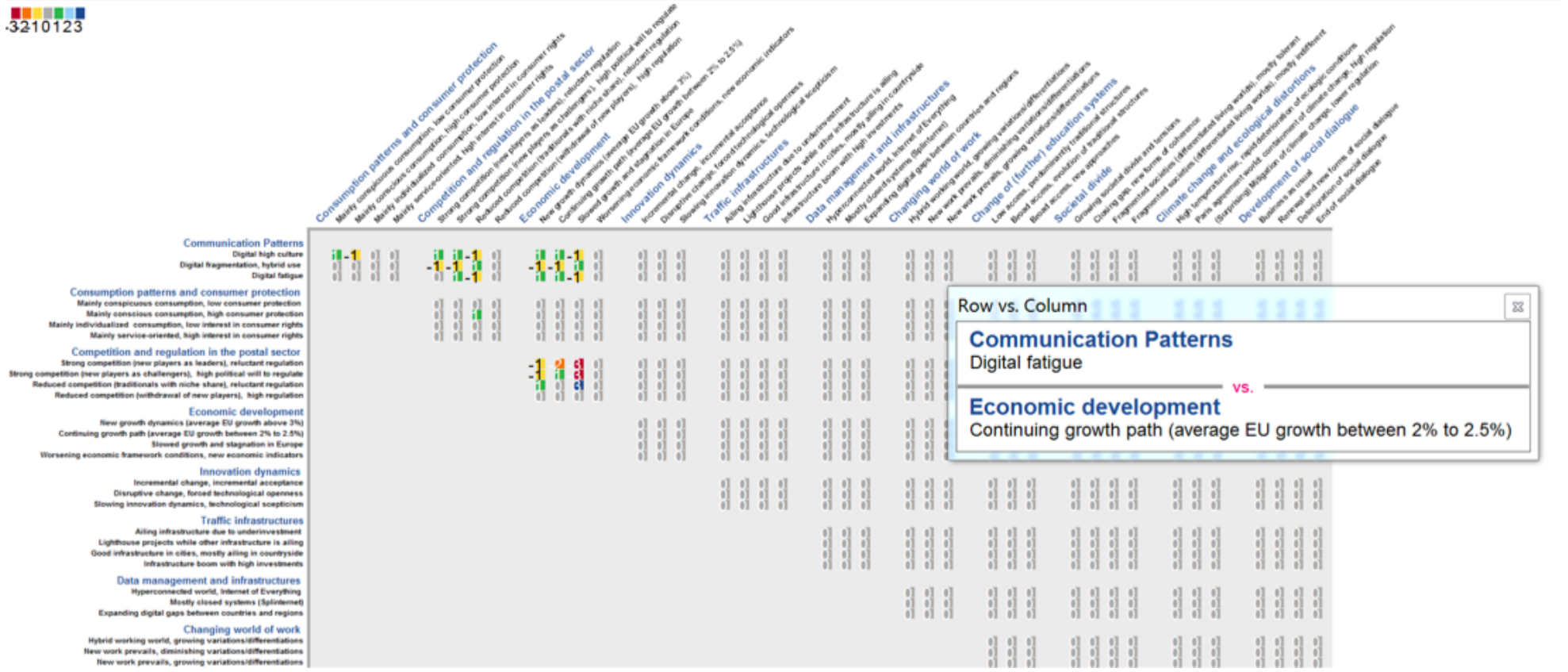


Consistency analysis

Work in progress...



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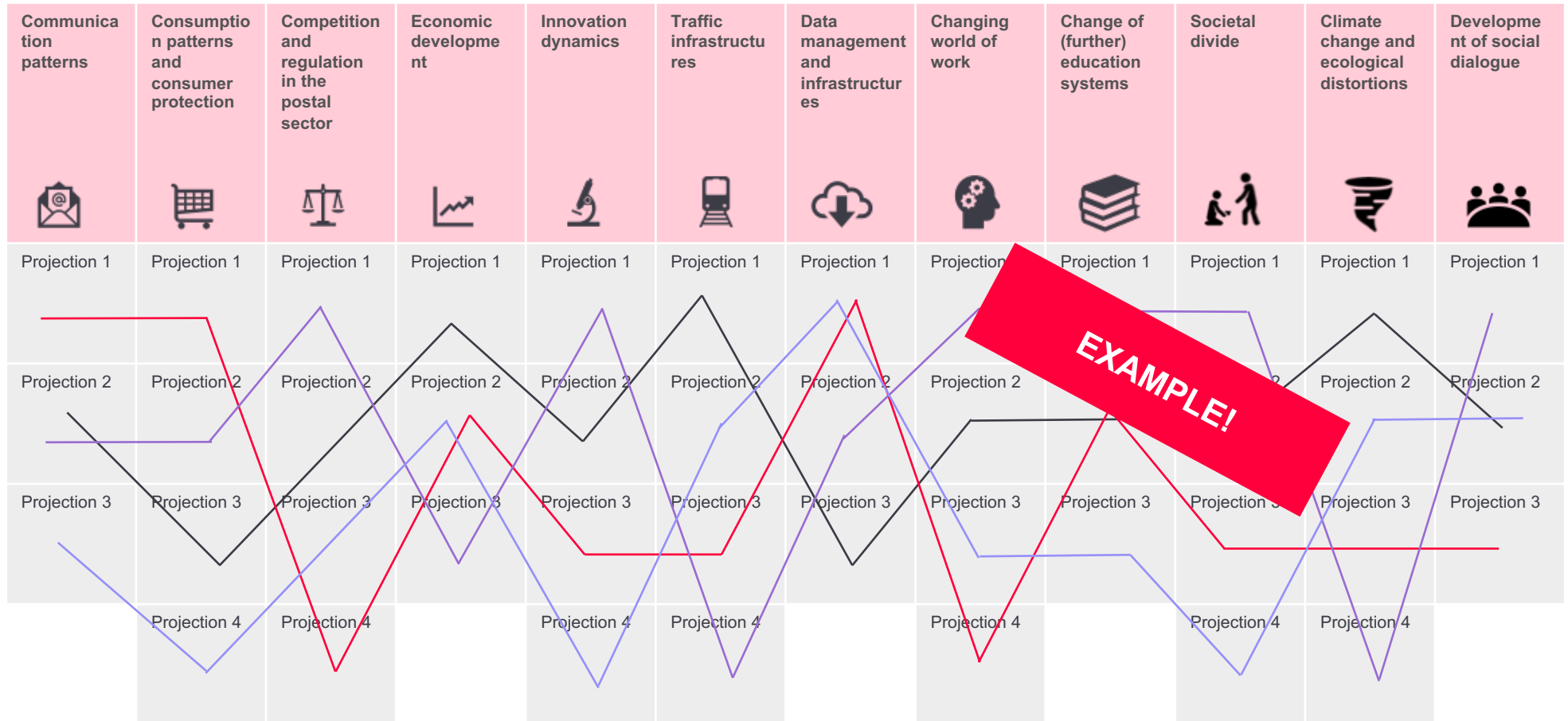
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What's next?

Scenario building

Work in progress...



Scenario A

Scenario B

Scenario C

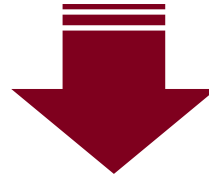
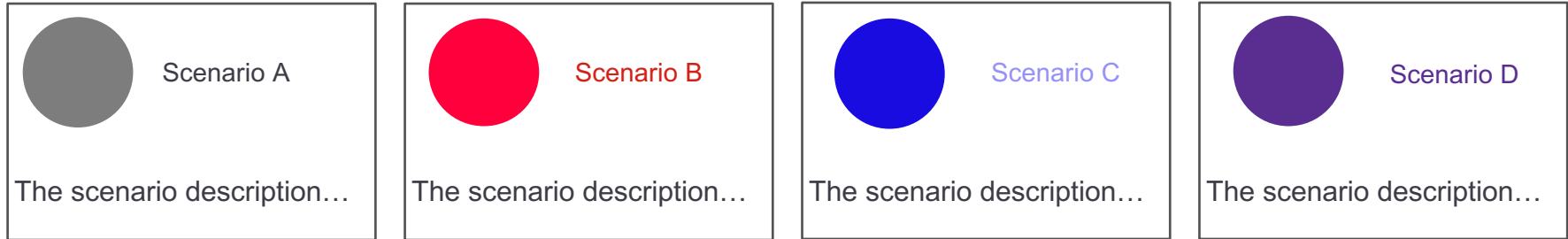
Scenario D

What's next?



Work in progress...

Draft scenarios



Since we use an explorative approach, not a normative one, our aim is to have **a set of four plausible and realistic scenarios**, that is both differentiated enough and covers a broad future opportunity space.

What's next?



Work in progress...

Draft scenarios



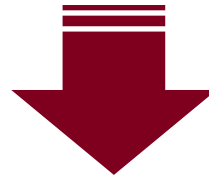
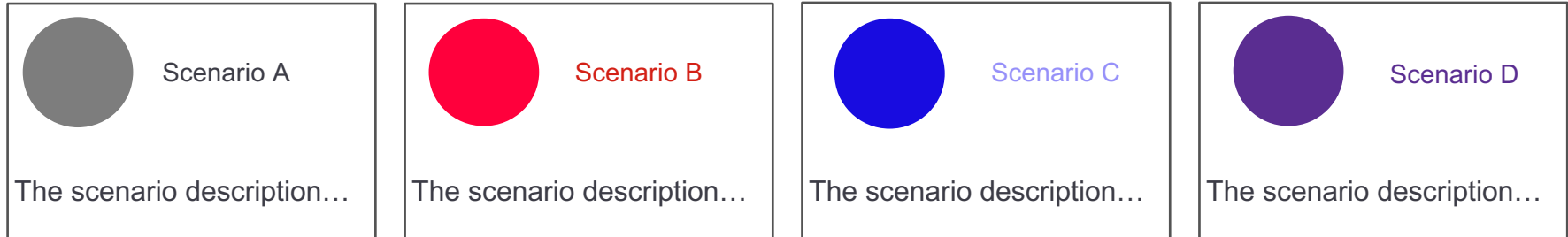
- A well-constructed scenario must contain enough detail to be useful for strategic planning, but not so much as to become overly specific and irrelevant to the issues of interest.
- We must be inventive and imaginative, without letting our pictures become too obscure or fanciful.

What's next?



Work in progress...

Draft scenarios



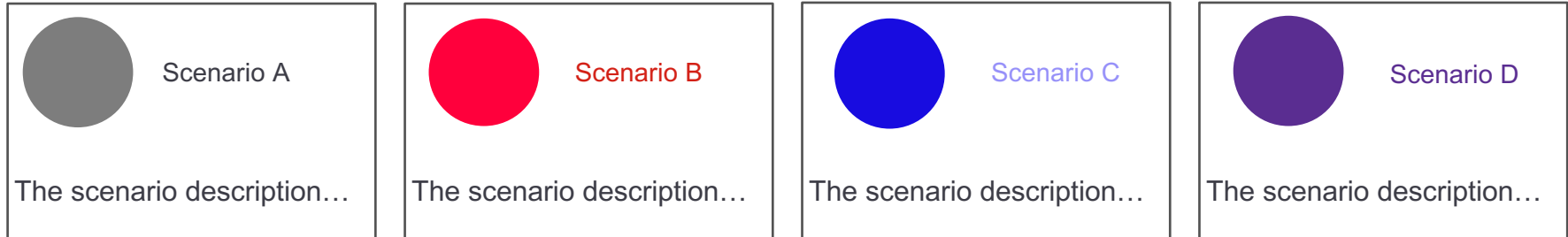
- Scenarios can be described either very simplistic and selective or sufficiently complex with intersections between the scenarios.
- In this project, the latter should be chosen in order to cope with the complexity of the topic.

What's next?



Work in progress...

Draft scenarios



- Scenarios should be described in a way that they are comparable.
- For this purpose, it is advisable to apply the same analysis levels in each scenario. This also leads to some kind of system image.

What's next?



Draft scenarios

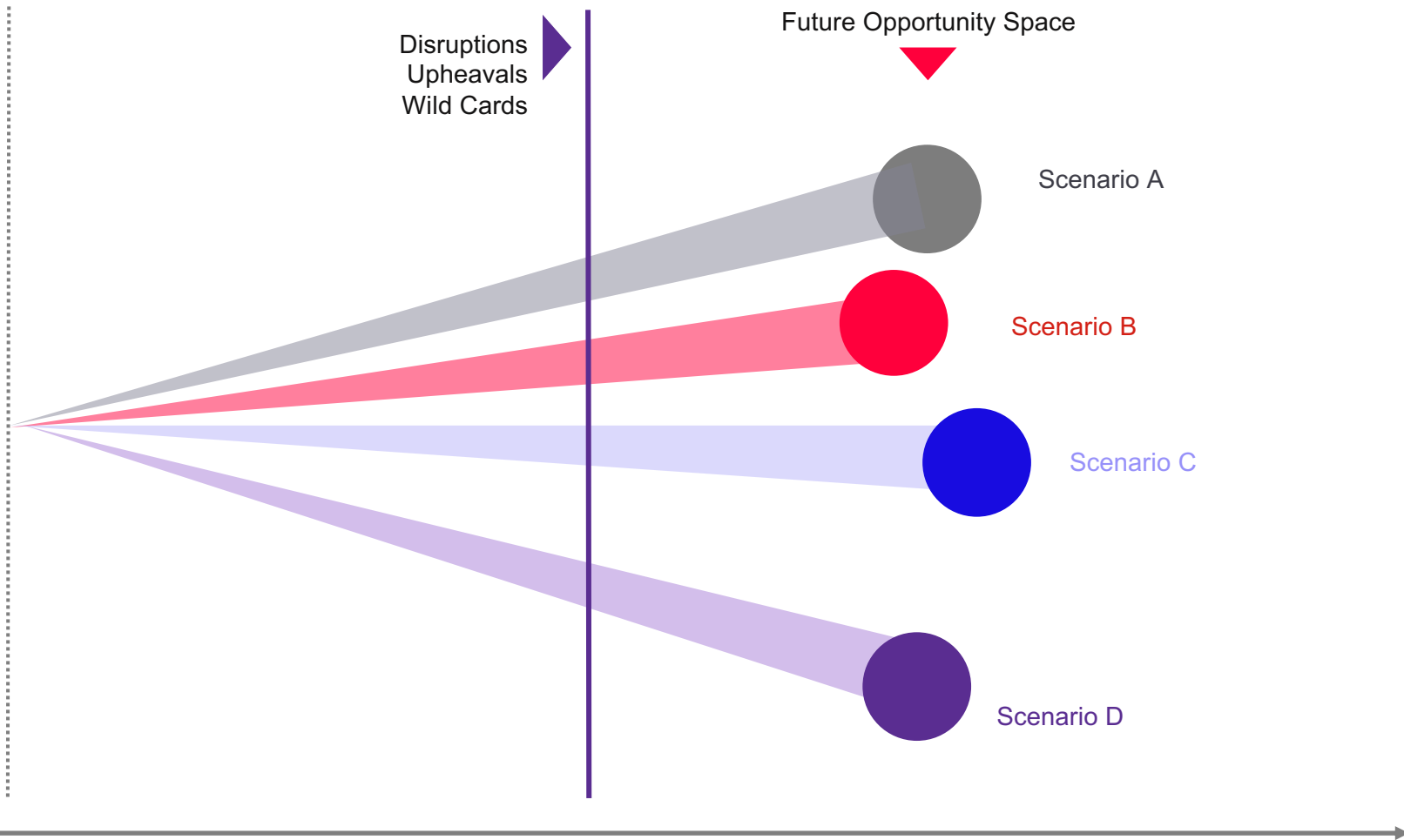
Draft scenarios to be discussed and enriched in the Warsaw workshop



How could the postal sector look and work like in 2030?

Disruptions
Upheavals
Wild Cards

Future Opportunity Space



Present

Future

What's next?

Scenario writing: Long versions

After Warsaw



How could the postal sector look and work like in 2030?

Disruptions
Upheavals
Wild Cards

Future Opportunity Space

Scenario A

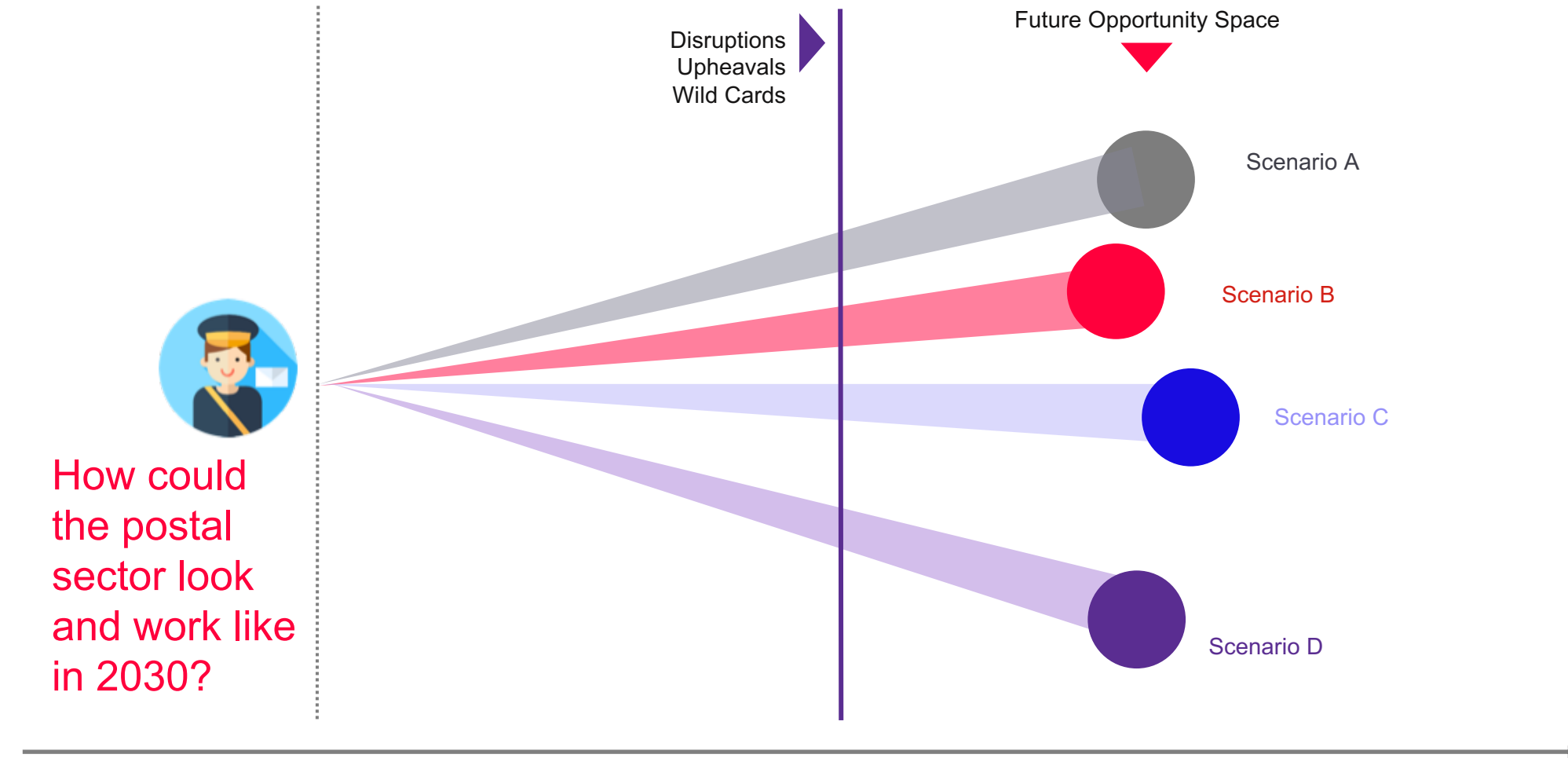
Scenario B

Scenario C

Scenario D

Present

Future



What's next?



And then?
What to do with
the final scenario
report?

What's next?



- Scenarios are a planning tool. They are carefully constructed snapshots of the future and the possible ways the postal sector might develop.
- Scenarios help focus thinking on the most important factors driving change in any particular field.
- By considering the complex interactions between these factors, we can improve our understanding of how change works, and what we can do to guide it.

What's next?



In a nutshell:

- Scenarios present snapshots of possible futures.
- Scenarios are tools for focusing thought, developing shared visions, and determining policy.
- Scenarios do not predict the future, but help us to decide what to do now.

What's next?



But scenarios are not only stepping stones for strategic planning, they are also a springboard for a dialogue about the future.

What's next?



When discussing the scenarios, the future becomes tangible.

What's next?



Given the scenario set...

- ...what developments are considered to be negative or positive from all sides in your group?
- ...what are common future challenges or opportunities?
- ...are there any new ideas for the future of the SDC arising from the scenarios?
- ...which future do we (as the SDC) want? What is the common ground?

What's next?



What to learn from scenarios?

- Think in alternatives! Plan A stands for Plan Alternative.
- Consider complexity and possible surprises!
- Think in interactions and second order effects!
- Look at the present differently! Try to analyse the present in a future-minded way.



“The future is already here – it's just not evenly distributed.”

William Gibson, Science fiction author

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