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**SWP 40/92 LOGISTICS GOES GLOBAL: THE ROLE
OF SERVICE PROVIDERS AND USERS**

**LAWRENCE CUMMINGS
Doctoral Student
Cranfield School of Management
Cranfield Institute of Technology
Cranfield
Bedford MK43 0AL
United Kingdom**

(Tel: 0234-751122)

(Fax: 0234-751806)

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LOGISTICS GOES GLOBAL - THE ROLE OF SERVICE PROVIDERS AND USERS

Logistics was recently described to the author as a "sexy area of research", a term also used by the former Chairman of National Freight Corporation (Thompson 1991) who describes the process of renaming the old Institute of Physical Distribution Management to include the word logistics - "We sat down and looked at the name of our Institute..... and asked ourselves if it really was a sexy kind of title and a banner to go forward into the '90s". In the early 1990's logistics has become a buzz word, a trendy designer label. There are many definitions of what it means. The older definitions (Van Buytenen (1976) "an integrated approach where cost savings are identified by considering the total costs of the system") talked mainly about cost reductions. Newer definitions talk about value added. Plunkett (1991) for example talks about "all the value added activities, beyond the simple physical transport of goods from A to B... The definition would include information technology systems, warehousing operations and any other service potentially involved in supply chain management". Willersdorf (1991) talks about "adding value in Warehousing, inventory and distribution". Thompson (1991) mentions the Napoleonic Military origin of the word as does Remmel (1991), but what is the modern reality ?

Service users themselves talk about supply chains or supply pipelines. In the quality conscious 1990's there is talk about partnerships, about reducing the numbers of suppliers, about rejecting the old adversarial customer/supplier relationship in favour of working together to a common goal, but the fact remains as Thompson (1991) again points out "We went from blissful ignorance of logistics to a massive use of the word, without having actually got rid of some of the blissful ignorance of what logistics really is all about".

The first use of logistics in a transport and distribution sense, was to describe domestic warehousing and distribution operations. The imminence of the Single European Market of 1993, subsequently threw the spot light on international logistics, as service providers jockeyed for position in the run up to the Single European Market (in which ironically international logistics will effectively become domestic again). This domestication of the European logistics market has led to a new logistics label (Global Logistics).

The globalisation of markets heralded by Levitt (1983) is still not universally accepted, especially in the service industry sectors, despite the claims of Segal - Horn (1991) who makes out a strong case in support of the Globalisation of services offered by inter alia, advertising agencies (Saatchi and Saatchi) Financial Services (American Express) and airlines (British Airways) together with myriad examples in the retail sector (Body Shop, Marks & Spencer, McDonalds etc). But can such a case be made for service providers in the logistics sector. Where are the global logistics service providers ? Which service users are themselves sufficiently global to take advantage of any global logistics networks ? And how many service users are actually structured in such a way as to make demands for global logistics services a reality.

Many factors militate against what Grey (1981) called the "integrated approach". Many organisations are not structured to allow the adoption of an international logistics approach, there is little sign of integration nor of what Thompson (1991) calls "the reality of logistics", which is "that the control and optimisation of a supply chain of materials must start way back at source..... Unless it is put into the hands of one individual you are bound to get sub optimised results because each section of the business is judged in isolation". Compartmentalisation is still rife with divisions between marketing, production, finished goods, export sales and finally, somewhere, "shipping". Many companies split totally; imports is purchasing, exports is sales, shipping is commercial, transport is production etc etc.

Militating strongly against the logistics approach is the question of terms of sale. Only when the exporter controls the freighting process can he control his own logistical destiny; this approach calls for at least C&F and preferably Free Domicile terms of sale. But the trend in British industry in particular, is still towards ex works or FOB pricing leaving the purchaser/consignee to take the logistics decision (or to buy from someone prepared to deliver to his door). One shipper recently interviewed by the author confessed to having some forty lines/forwarders/consolidators/hauliers picking up freight from his warehouse on behalf of consignees, whereas another shipper recently interviewed uses two forwarders for air and sea and another two for European haulage and sees scope for further reducing the numbers if the service providers can get their quality and multimodal mix right.

In order to understand the extent to which freight (logistics) service providers can be said to be global, it is necessary to understand firstly, what is meant by the term global in this context, and also to examine some of the history of the way that the logistics service industry has grown. Levitt (1983) majors strongly on the homogenisation of customer demand. One would imagine that customer demand for logistic services is fairly homogeneous, - after all the basic "product" is very simple - the movement of goods from point A to point B by any of a number of modes of transport - air, sea, road, rail and in some cases by combinations of these. At first glance therefore, to become global a service provider needs only to be in the main centres of industrial production and of consumption in order to satisfy "global demand". Unfortunately of course reality is not that simple. One starting point is to examine the various definitions of globalisation.

Chandler, in Porter (1986) traces the history of globalisation from the earliest move made by American, German and British companies in the late 19th century and shows how much of the early globalisation occurred from a strong domestic base. This is particularly the case with the Americans who "went global" in order to preserve the economies of scale and scope that they had enjoyed as a result of their own enormous domestic market. It is therefore not unexpected that logistics service providers usually followed a similar path to globalisation. The chosen service provider of a globalising organisation would therefore merely extend its international services, usually by means of forging overseas agency relationships.

As globalising organisations began to set up overseas subsidiaries, so some service providers did likewise, but to a much lesser extent. It is fair to say that the norm for eg. shipping lines remained the setting up of agency networks overseas, rather than the establishment of owned offices. Indeed it is only in the late 70's and 80's that shipping lines have actually chosen to develop their own in-company networks as described by Chrichton (1992) (March). In some cases the link between shipping line and agent may have been slightly incestuous as in the case of Blue Funnel (Falkus 1990). It is therefore not difficult to understand how many service providers handling large volumes of freight can be described as global only in respect of the destinations that they serve. They cannot be termed global as a result of their office or installation networks. Thus Kintetsu, the world's largest airfreight forwarder in terms of IATA spend in 1991, gains that position purely as a result of its enormous market share in its home country, Japan. This has also allowed a basically regional US service provider like F.X. Coughlan to internationalise via agencies on the back of the volumes provided by its major customer, Ford.

For many service providers the next stage of development is to move from a domestic base with agencies to becoming in effect a multi national, by progressively and selectively replacing agents in key geographical areas with owned operations. It is at this stage that the degree of globalisation begins to change, and it is at this stage that the configuration and co-ordination descriptions contained in Porter (1986) become relevant.

The logistics service product itself is by its very nature fairly standardised. It is at base the transportation of goods from A to B, with a number of domestic value added services, - customs brokerage, warehousing, distribution, inventory control etc - at either end of the international freight movement. Obviously the different modes of transport within the international freight movement may or may not be offered by each and every service provider. Similarly individual modes may have internal differentiations based around transit time, quality of service (conference versus non conference in seafreight) etc. Given however that the product is to quote Levitt homogenous and standardised, to what extent are service providers global and to what extent do they really need to be global in order to satisfy the requirements of their customers ?

And indeed to what extent are customers looking for global services from their service providers ? The Harper Group 1991 Annual Report is very bullish on the subject - "The most exciting change is that our customers are asking for a "logistics service" rather than just transportation or warehousing. What that means is that they desire multiple services from one source, not multiple services from multiple sources. They are finding providers they can rely on, and then asking for a wider range of services.....

Many of our larger customers are looking for ways to enhance their competitive position on a global basis without incurring the overhead or fixed costs associated with doing business overseas. They are looking for a logistics partner who will staff and manage these functions, as well as supply speciality services, such as inventory management, protective packaging and order processing. Some of these companies are centralising all or part of their manufacturing or distribution on one region and are using global sourcing for parts and supplies. We see this happening now in Europe as the Economic Community begins to take shape and have been involved with this trend in Asia for many years...."

Major airfreight forwarder MSAS is also bullish, but apparently with better reason. In its house magazine Top Cat (Anon 1992 c,d,e,f,g) a series of interviews with major customers - Unisys, Richardson Electronics, Digital, ICI, Compaq, AT & T - establishes a case for sophisticated partnerships between logistics service providers and a "new breed" of "shipping managers" in the shape of "supply chain directors." Not surprisingly, this view is supported by consultants - Boston Consulting Group, Ernst & Young, Price Waterhouse and P - E International. But to what extent is this view supported by smaller customers; without the sophisticated systems and breadth of vision of those multinationals ?

But Crichton (1991a) begs to differ, believing that some service providers are offering such services as a response to perceived competition rather than to actual customer demand. - "Perhaps this creeping (and costly) fashion is as much about outshining the competition as giving customers what they need ?" Eller (1992) expands this view in a more detailed case study of major traffic flow - CKD cars out of Japan to the USA and Europe. Eller shows how the methods adopted by customers for dealing with service providers, and the elements of the supply chain entrusted to service providers varies from door-to-door for UK imports right through to independent haulier in Japan, shipping line to US port, railroad company deal for double stack transportation to hub and independent trucker from hub to plant - 4 separate elements and 4 separate negotiations.

In the classic multi domestic international corporation, it may well be that the organisation does not regard it as a necessity for its service provider to be represented at both ends of the international chain. It may be quite happy to give traffic to a strong local/domestic operator with no real regard for the full implications on the supply chain. The question as ever comes back to customer demands and requirements but also the make-up of the international logistics service market place itself often restricts the choices available to customers. Because of the piecemeal growth of the networks of global logistics service providers, there are very few international service providers who can claim truly global capabilities and these are a select few whose global networks are of comparatively recent origin. Thus it is that a British shipper for example having himself a global network of production, fabrication, distribution and sales facilities, will prefer for example to use the British flag carrier P & OCL who are well represented on the majority of East West trades but have no capability trans Pacific or to South America, West Africa and the emerging Eastern Block. Only the Japanese giants Mitsui and NYK, the Taiwanese Evergreen the American Sea-land and the Danish Maersk can offer full East West coverage but their North/South routings leave much to be desired. In the air the situation is the same. Can British Airways really claim to be a global carrier ? Are the claims of United and American more genuine ?

Given these gaps in service provision networks it is small wonder that the horses for courses mentality prevails amongst the users of logistics services.

In the airfreight consolidation industry for example, there is a distinct move towards the use of "mega forwarders" - MSAS, AEI, LEP - with extensive global representation mainly through owned offices with gaps in the third world in particular plugged by agencies. These service providers are increasingly attractive to multi nationals looking to do business with a service provider who is located in the same major industrial centres as themselves, but these multi nationals are still quite happy - and often prefer to use niche operators to the more exotic locations where they feel a degree of specialisation is essential.

At least these mega forwarders have for the most part no exposure to the operating of such highly expensive pieces of equipment as ships and aeroplanes. It is easier for these organisations to spread globally than it is for shipping lines, airlines etc.

These mega forwarders invest large sums in facilities on the ground at origin and destination increasingly linked by sophisticated information technology to provide the global links demanded by their customers. They then adopt the role of freight managers becoming the inter-face between the customer and the actual carrier. There are some examples of multi modal operators - both Hapag Lloyd and Maersk own regional airlines, Evergreen has recently expanded in to air travel with its purchase of EVA International; the giant American Sealand is part of CSX Corporation, a leading provider of railroad services on the North American continent. But there is a world of difference between operating globally with the horrendous cost implications it brings and providing services globally, many of which services are offered on a management basis.

The above offers many hypotheses which need to be tested. Do the lower cost non-operating service providers have a competitive edge ? Or do shippers prefer to deal with operators on a horses-for-courses basis ? Can the more global networks of the non operating forwarders in particular entice shippers to entrust freight to them as freight managers rather than as carriers ? And perhaps', most important of all, what does the logistics service user actually want ?

As the first stage of research into the use of logistics service providers by explorers and importers, interviews were conducted with 18 companies. The initial aims were to examine modal use, the reasons behind the choice of service provider and how modal split was allocated.

Questions were also asked regarding the "type" of service provider used - operator (shipping line, airline, haulier, integrator) or non operator - (forwarder, air consolidator, TIR consolidator etc) and the users were asked if they could envisage using one service provider for all modes and routes. Finally, an attempt was made to investigate how companies organised logistics activities within their organisations - was any attempt made, for example, at unifying all the logistics - related activities into a single department, or was responsibility for its various activities spread widely within the organisation? In one company, the Planning and Product Distribution Manager claimed total responsibility for all aspects of logistics activities, except export sales, whilst admitting to selling totally ex-works/FOB and having 40 different service providers collecting from his door! Furthermore, he could not foresee using a greatly reduced number of service providers on account of servicing too many destinations! The MOD claimed to have tried using a single multi modal service provider - "it didn't work". In one major, high value exporter, the interviewee - a "principal shipping officer" had responsibility for 3 out of 12 logistics related areas. A number of interviewees would use a single multimodal service provider if the quality of service and price were acceptable. Some - Wellcome Foundation, ICL, Reuters - were making deliberate moves towards reducing the number of suppliers of logistics services used. Some were not prepared to make the changes in terms of sale necessary for this to come about. One - Ford New Holland - saw potential for a "managing agent" handling all logistics functions.

Only 3 interviewees had the word "logistics" in their job title. 12 were "managers", with one of each being "supervisor" "controller" "officer", "head of", "co-ordinator". Only one - Ciba Corning - was a director. This speaks volumes about the status of individuals responsible for logistics activities in the traditional hierarchies of British companies.

The reporting lines of these individuals were also of great interest. 10 reported to other managers, 2 to a "head of" or "chief of", 3 reported to Directors and only 2 (Ciba Corning and Burle International) to the M.D. The MOD man reported to "a committee".

The question of ultimate responsibility for logistics activities within these organisations was also somewhat vexed. Only three respondents categorically stated that they were the decision makers. In four cases the decision maker was their boss, and in two cases their bosses boss.

In GEC and ICI the decision was taken centrally as corporate policy, a situation mirrored by the MOD "committee". In three companies the decision was taken elsewhere in the organisation - in one case, the decision was made in the USA.

This initial research, therefore, reveals a distinct lack of any consistent pattern, among these major British exporters and importers, in their approach to the logistics function.

The findings would seem to militate against claims for homogeneity and globalisation of logistics, although it is clear that in some areas progress is being made by quality conscious organisations like ICL, Ford and Wellcome. These organisations realise that as market conditions change, so their requirements for logistics services change in terms of capabilities, geographical span and the service relationship. They increasingly see their logistics strategy as part-and-parcel of mainstream management strategy, and their logistics service provider as an ally in the competitive battle. Service providers must react to the changing needs of users whilst seeking to influence the strategies of their customer in their favour. This dilemma lies at the heart of this ongoing research project.

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Cranfield School of Management

Cranfield Institute of Technology
Cranfield Bedford MK43 0AL England
Telephone National Bedford (0234) 751122
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