



## **“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?



# SDC Project “Trend Research for the Postal Sector in 2030“

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







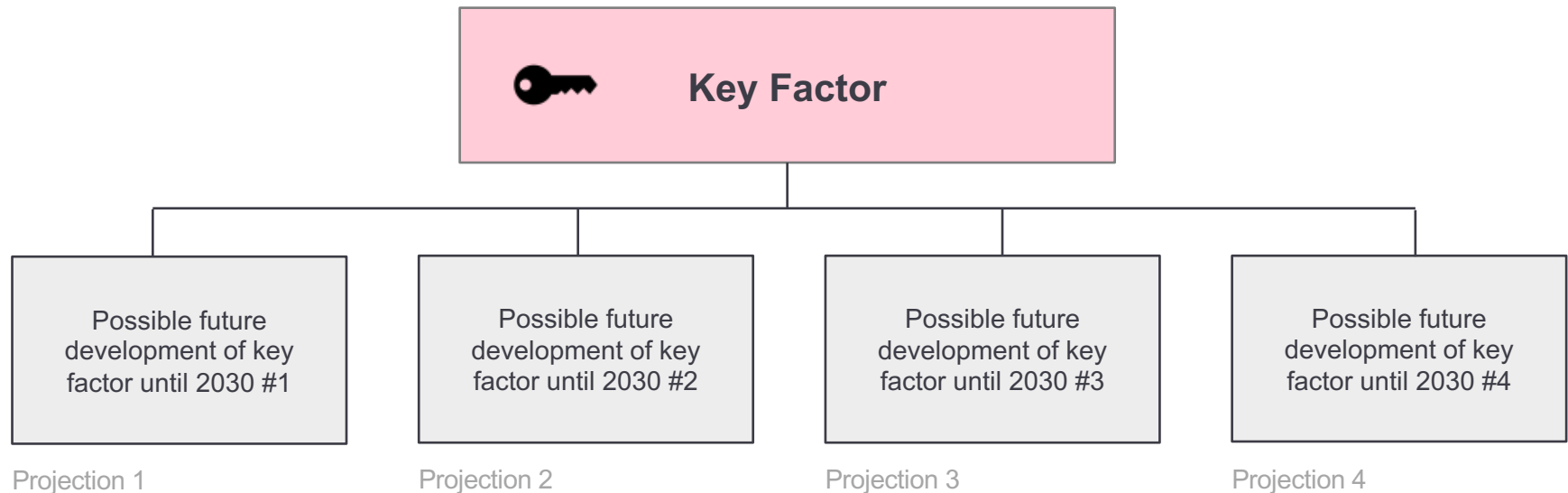
## Bonn Workshop



## Bonn Workshop

### Guiding question for every key factor:

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







# SDC Project “Trend Research for the Postal Sector in 2030“



The story so far...

## Morphological Box

### Result of Bonn Workshop

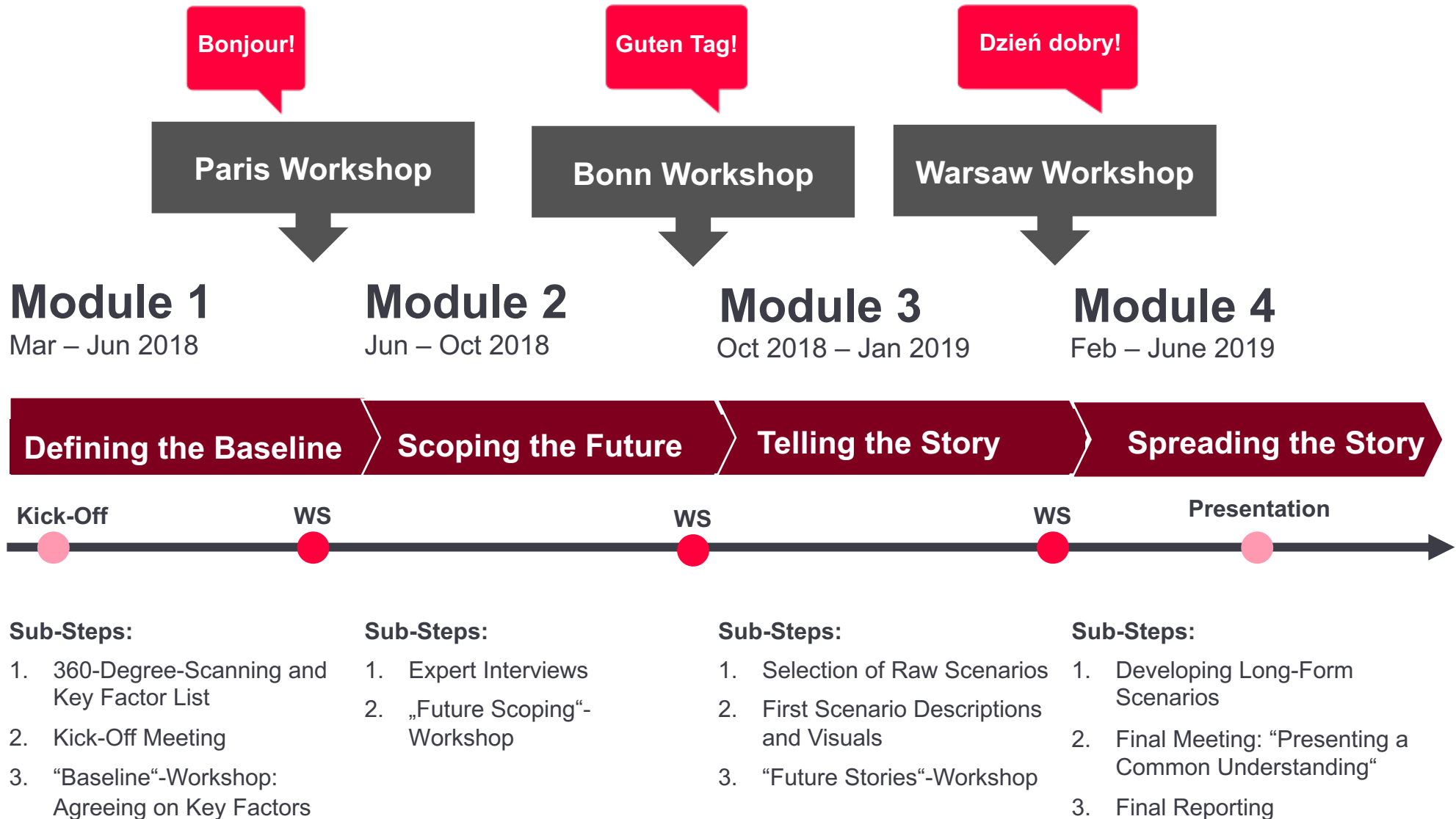


Communication patterns	Consumption patterns and consumer protection	Competition and regulation in the postal sector	Economic development	Innovation dynamics	Traffic infrastructures	Data management and infrastructures	Changing world of work	Change of (further) education systems	Societal divide	Climate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

# SDC Project “Trend Research for the Postal Sector in 2030“



## Timeline and Process





# SDC Project “Trend Research for the Postal Sector in 2030“



## 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?





# SDC Project “Trend Research for the Postal Sector in 2030“



What's next?

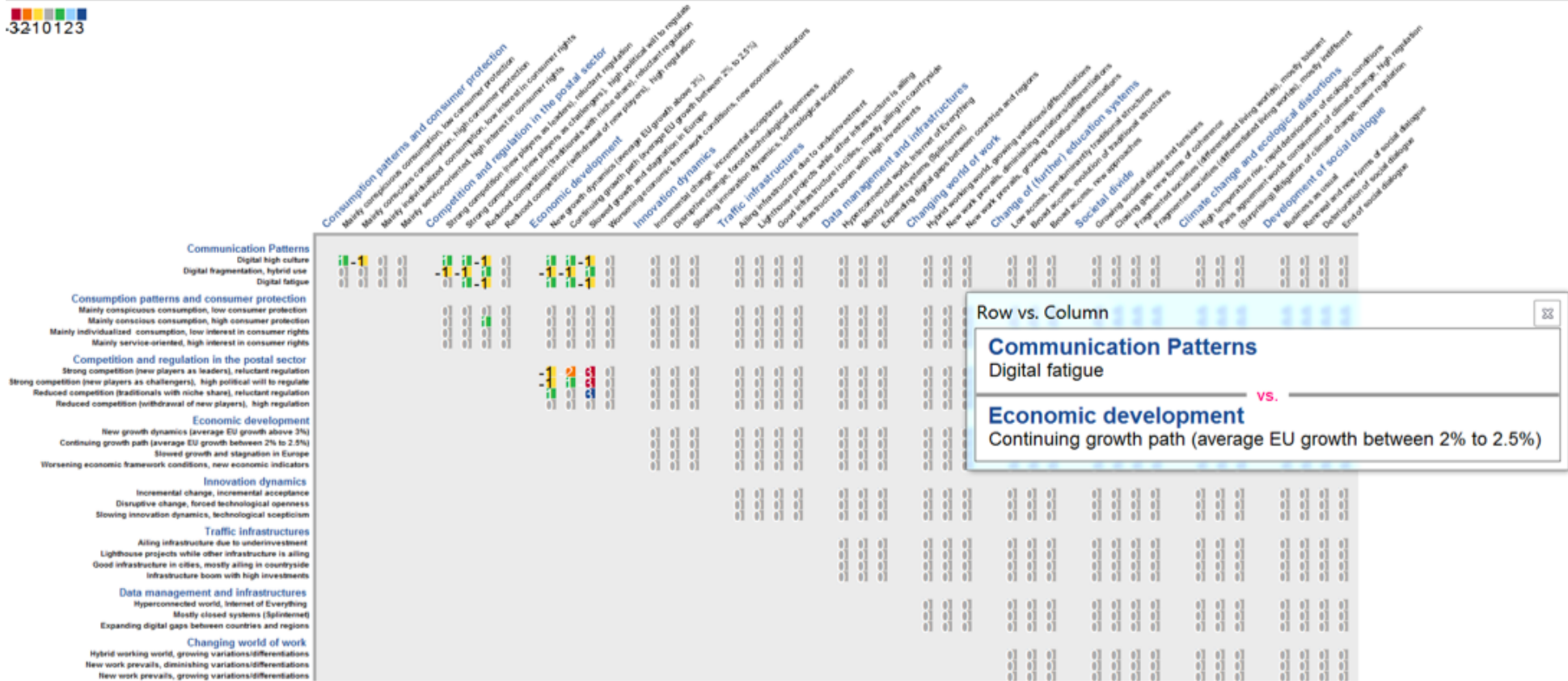


## Consistency analysis

Work in progress...



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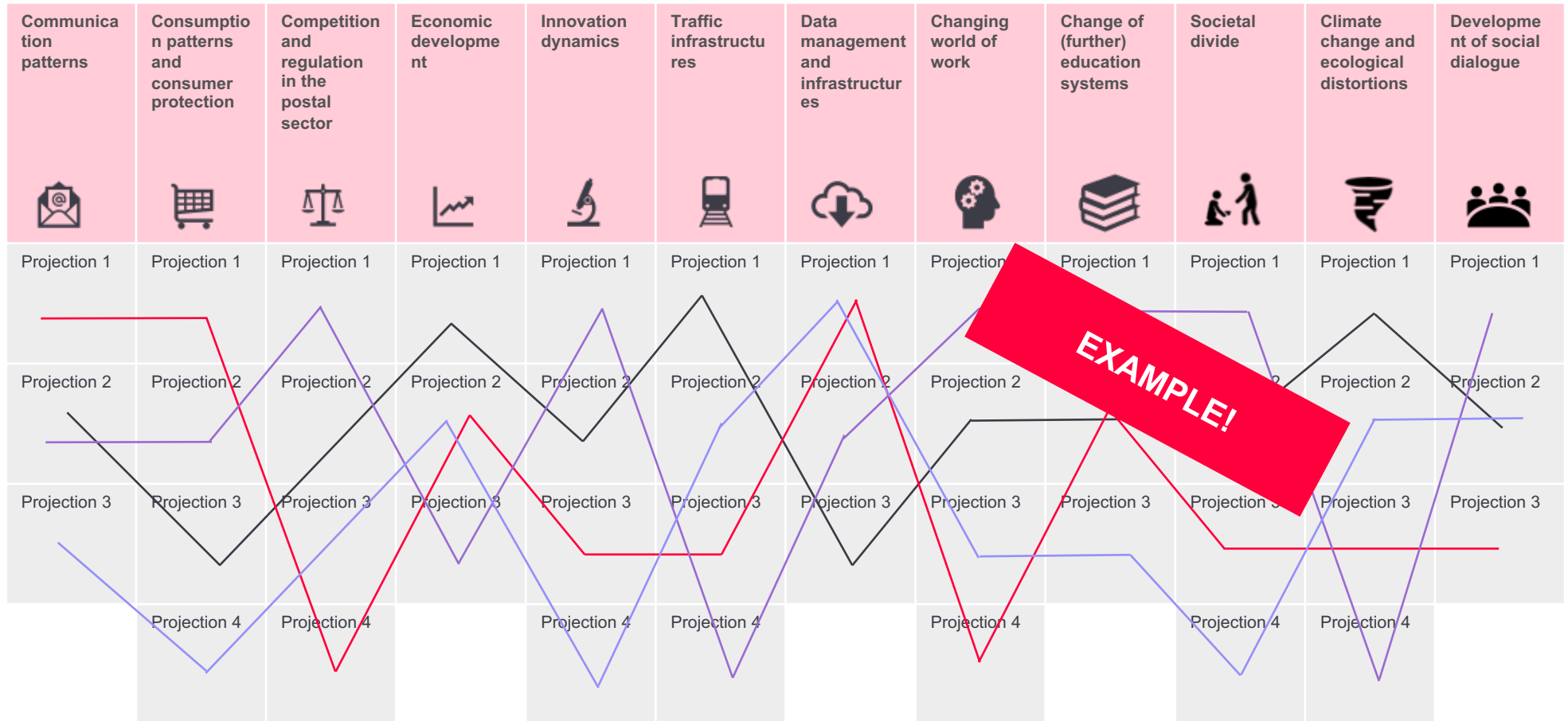
# SDC Project “Trend Research for the Postal Sector in 2030“



What's next?

## Scenario building

Work in progress...



Scenario A



Scenario B



Scenario C



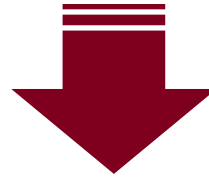
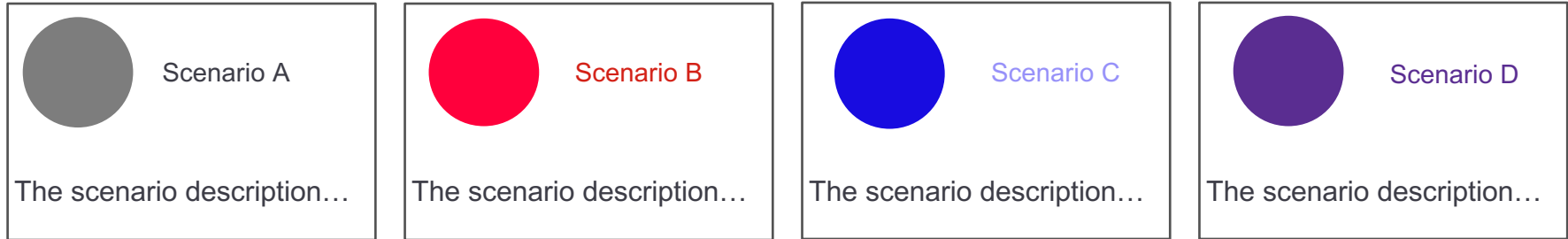
Scenario D

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.

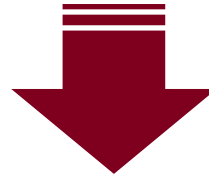
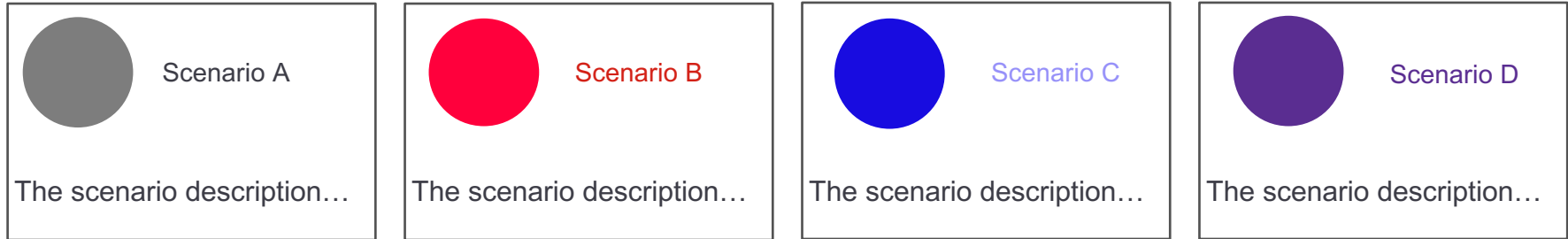


What's next?



Work in progress...

## Draft scenarios



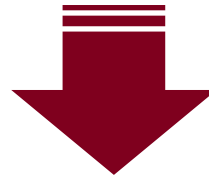
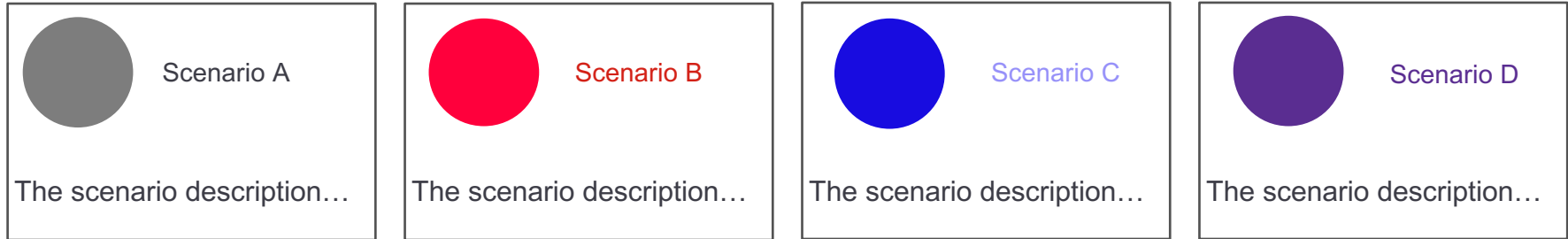
- A well-constructed scenario must contain enough detail to be useful for strategic planning, but not so much as to become overly specific and irrelevant to the issues of interest.
- We must be inventive and imaginative, without letting our pictures become too obscure or fanciful.

What's next?



Work in progress...

## Draft scenarios



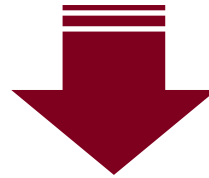
- Scenarios can be described either very simplistic and selective or sufficiently complex with intersections between the scenarios.
- In this project, the latter should be chosen in order to cope with the complexity of the topic.

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

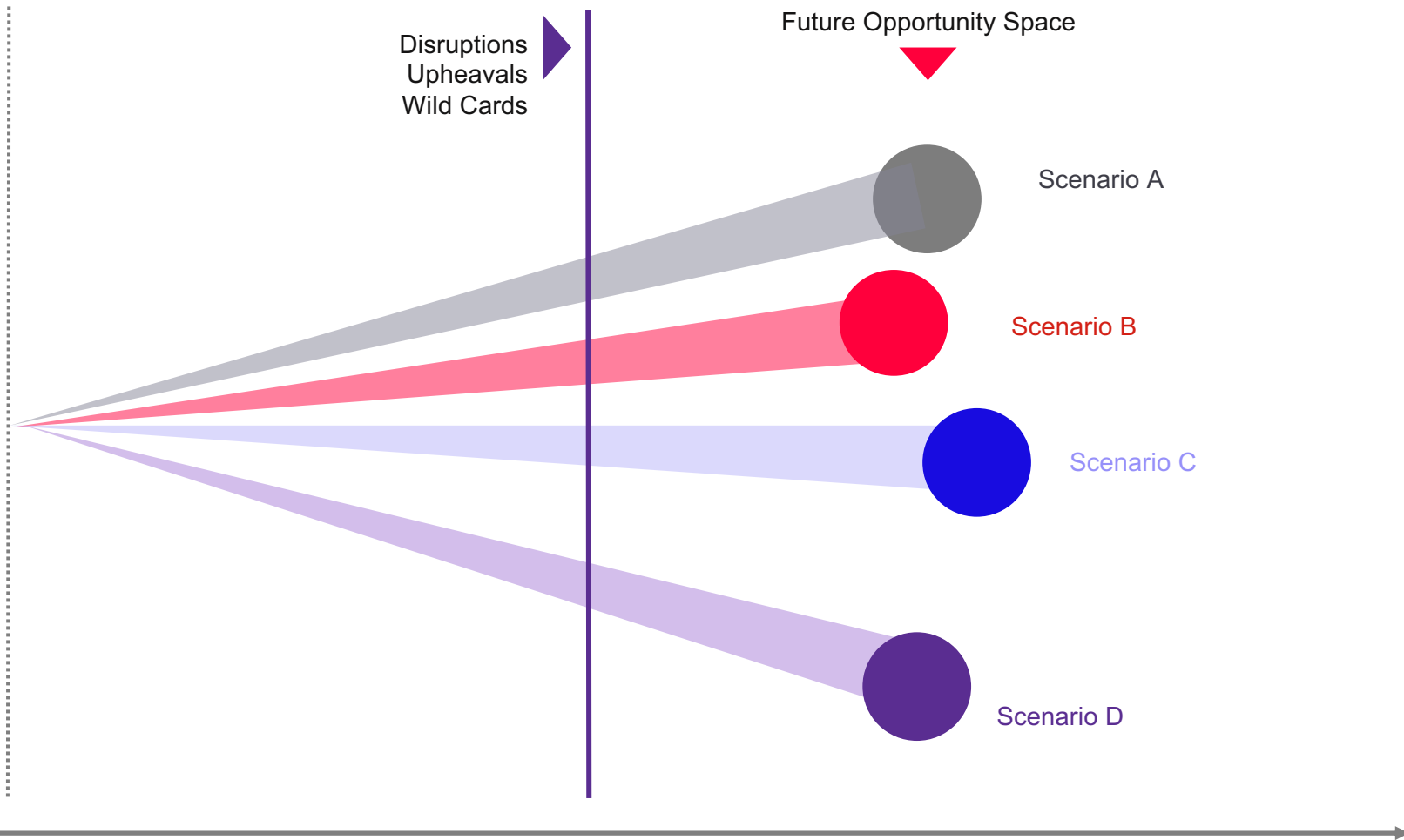
## Draft scenarios to be discussed and enriched in the Warsaw workshop



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

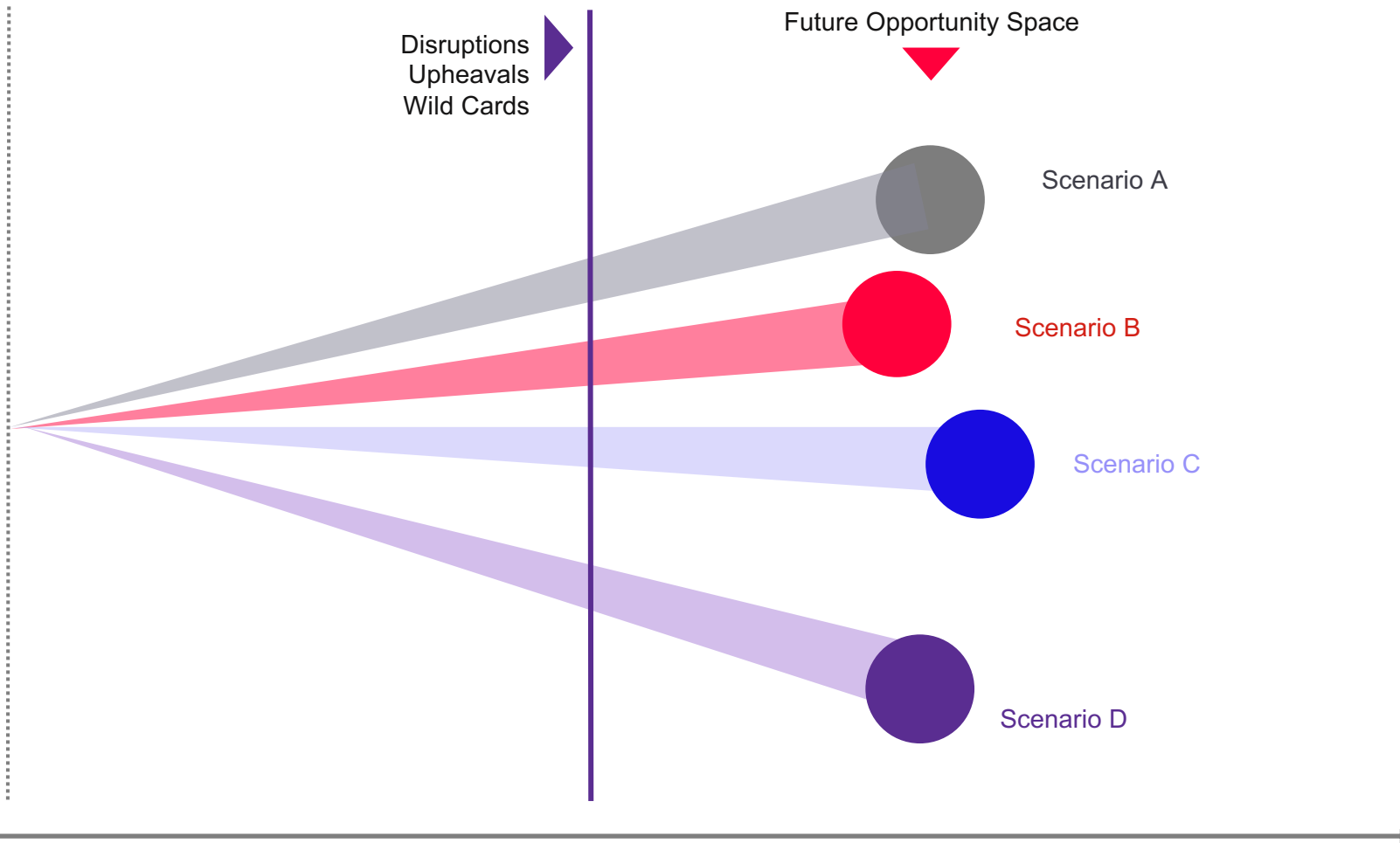
Scenario B

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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