“Trend Research for the European Postal Sector in 2030“

Presentation of intermediate results of the scenario process

Z_punkt The Foresight Company
Brussels, Belgium, December 4th, 2018
(1) The story so far…

(2) What’s next?
01
The story so far…
SDC Project “Trend Research for the Postal Sector in 2030”
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.
What possible futures can we expect? Which options for the future do we have?

The answer: Scenarios!
Remember: Scenario planning is not about predicting the future, it’s about preparing for alternative futures!
Because if you have only Plan A, all the rest of the alphabet is missing ...
What have we achieved so far?
Initial question

What could the postal sector look like in 2030?
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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?

Social Factors
Assessment regarding impact/uncertainty
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The story so far…

**Final Shortlist of Key Factors**

<table>
<thead>
<tr>
<th>Factor</th>
<th>Result of Paris Workshop</th>
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<tbody>
<tr>
<td>Communication patterns</td>
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<tr>
<td>Consumption patterns and consumer protection</td>
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<td>Competition and regulation in the postal sector</td>
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<td>Development of social dialogue</td>
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</table>
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The story so far…

Guiding question for every key factor:
What are plausible possible future developments for this factor until 2030?

Key Factor

Possible future development of key factor until 2030 #1
Projection 1

Possible future development of key factor until 2030 #2
Projection 2

Possible future development of key factor until 2030 #3
Projection 3

Possible future development of key factor until 2030 #4
Projection 4
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The story so far…

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

The story so far…

<table>
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<tr>
<th>Morphological Box</th>
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<tbody>
<tr>
<td><strong>Communication patterns</strong></td>
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<tr>
<td>----------------------</td>
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<tr>
<td>Digital high culture</td>
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<td>Digital fragmentation, hybrid use</td>
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<td>Digital fatigue</td>
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Result of Bonn Workshop
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Timeline and Process

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

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
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Feb – June 2019
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1. Developing Long Form Scenarios
2. Final Meeting: “Presenting a Common Understanding“
3. Final Reporting

DONE

WORK IN PROGRESS
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What’s next?

Consistency analysis
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**What’s next?**

### Scenario building

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**Scenario A** | **Scenario B** | **Scenario C** | **Scenario D**
What’s next?

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Draft scenarios

- Scenario A
- Scenario B
- Scenario C
- Scenario D

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.
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.
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.
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.
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What’s next?

Draft scenarios to be discussed and enriched in the Warsaw workshop

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

Future Opportunity Space

Disruptions
Upheavals
Wild Cards

Scenario A

Scenario B

Scenario C

Scenario D
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What’s next?

Scenario writing: Long versions

Disruptions
Upheavals
Wild Cards

Future Opportunity Space

Scenario A
Scenario B
Scenario C
Scenario D

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

After Warsaw

Present

Future
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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.
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What’s next?

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

When discussing the scenarios, the future becomes tangible.
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What’s next?

Scenario A
The scenario description...

Scenario B
The scenario description...

Scenario C
The scenario description...

Scenario D
The scenario description...

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?

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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.
What's next?

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

William Gibson, Science fiction author
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