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Strategical aspects of third party logistics providers operating in peripheral markets

This paper presents a simple analysis of the centre-periphery discussion within the context of the Iberian Peninsula, being aware that the companies that are present in this market suffer a logistical penalty in comparison with the centre of Europe. It is common knowledge that the economic specialisation pattern in the general Iberian industry is too traditional. Thus, knowing the logistical development stages and the specific profiles of the local companies and other transnational organisations operating in the market, third party providers may adjust and formulate unique services to render better performances and add real value. It is even possible that the skills that those operators will create may represent the driving force of some future development, building differentiation capabilities and contributing to diminish the imbalance between both centre and periphery and to give rise to a new market innovation framework.

1. CENTRE-PERIPHERY AND AGGLOMERATION: PARADIGM OF DEVELOPMENT FOR THE IBERIAN PENINSULA

The dichotomy between the centre and the periphery is not new in the field of regional development. Indeed, it is possible to classify both central and peripheral regions within macro — or smaller regions.

Adopting a simplistic approach, we could claim that the Iberian Peninsula is on the periphery of the centre of Europe just as Portugal is peripheral in relation to the centre of the Iberian Peninsula. While this is possible, even real today, these kinds of statements are always refutable, especially the second one, as, in strictly spatial terms, Portugal is the last region in Europe before the Atlantic if you look at it from the land but the first when viewed from the sea.

In the 15th and 16th century, that factor brought much greater development to Portugal and Spain than other regions of central Europe, even anticipating some of the effects of globalisation. This was an age of empires and a barter economy, in which the boat was the mode of transport men chose, whether to

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discover new worlds or to travel quickly from one "developed" world to another.

Five centuries later, we can say that economic development is built mainly on road transport and the idea of distance associated with it.

And as development does not appear everywhere at the same time or with the same intensity and, when it does appear, there are forces leading to the spatial concentration of growth around specific starting points[1], it is natural for the development to be explained by different models from those that we would have used at the time.

It is also natural that in another five hundred years development will be based on quite different or even completely unknown assumptions.

Thus, for some years now, the theories of location explain how the effects of agglomeration are converted into competitive advantages, especially when they arise from the joint effects of economies of scale, of transport costs and of the size of the production sector[2].

The effects of agglomeration are visible when the outputs of a certain region grow at the same time as costs go down and it is then difficult for the other regions to keep up with the rhythm of development it has achieved. In other words, today, the discussion on the periphery, or centre-periphery, underlies the premise that in each economic system there is an imbalance between the performances of the different regions[3].

For Friedmann[4], any economic system lives off regions that evolve, undergoing profound transformations. These transformations have the effect of aggravating imbalances, because the trend towards industrialisation leads to the concentration of investment in a small number of areas, giving rise to and increasing a dualistic structure. In contrast to a centre with rapid, intense growth, we have a periphery whose economy is imperfectly related to that of the centre and may go into, albeit relative, stagnation or even decline.

In these terms, the prospect of special equilibrium is hard to achieve and will never be reached as long as the development process only involves the economic forces themselves[5].

Even if we look at Krugman and Venables[6] with emphasis on the EU's objectives of convergence in the field of income and economic performance, we find they recognise the existence of imbalances.

Thus, and with our assumptions of development based on variables like the distances involved in road transport, or even hybrid, inter-modal or multi-modal solutions creating alternatives to congestion and speeding up the system, increasing its flexibility and capacity and reducing its environmental impact, the principle that the differences between regions tend to diminish as a result of the transmission of spatial growth by the intensity of a process based on inter-regional trade, may be a fallacy.

If we completely eliminate the infrastructural barriers that create peripheries, a utopic assumption, then the less developed regions run the risk of losing a degree of particular specialisation that may give them the potential to create economies of scale and produce their own model of asymmetric growth based on comparative advantages and a conception of pure commercial theory, given consistency by the difficulty in moving the factors and their differentiation.

On the other hand, if no infrastructures are created, the less developed regions will never feel the favourable effects of dispersed growth achieved by economies with complementarity, as is supposedly desired (both hypotheses are obviously controversial).

It would be much more positive if less developed regions could use their internal capacity to spark off sustained growth. To do this we have to assume that they are capable, on their own, of overcoming the effects of their distance from the centre by using local advantages that, to a certain extent, may compensate for the losses they have suffered from being on the periphery. Thus, companies in peripheral regions that are penalised logistically should be able to create benefits to overcome their handicap, creating their own businesses in order to differentiate themselves[7].

In this context, we must admit that Portugal and Spain, or the Iberian Peninsula, have been penalised to a certain extent in terms of logistics in relation to the centre of Europe. Indeed, it is in this field that we must analyse the characteristics of the market, the asymmetries, the services offered and the position they should take in order to make the logistics operators, or third party providers, more competitive and capable of winning battles not only in their own markets but in those close by, on the other side of the Pyrenees or of the Mediterranean, for example.

2. SOME EVIDENCE ABOUT THE IBERIAN PENINSULA

The long period of time in which the Portuguese market was subject to tariff barriers, and some sectors that even today regulate and protect certain segments in relation to the rest of the EU, were largely responsible for the fact that Portugal closed in on itself, with obvious effects on logistic development. In macrologistics, or even in merely corporate terms, it all started with the poorly developed road infrastructures, on one hand, and the public fleet licensing law of 1945, on the other.

The idea of that law was, to a certain extent, to protect the development of the railway, which was important for a certain period of time but which collapsed in the face of the dynamics of the road system and of its own demoralisation and lack of competitiveness.

With the new infrastructures, the road haulage companies came into their own, though much later than in the rest of Europe. And it was mainly these road haulage companies, especially those with vision, capable of making the most of their opportunities, that chose to offer additional logistics services. With the fall of the customs barriers, many of the old freight companies also set their sights on logistics, though most of them were unable to make the transition and fell by the wayside.

Even so, as the market progressively opened up, it allowed transnational companies in. These companies brought very different logistical practices from those in Portugal, which inspired some of the Portuguese operators with whom they began to compete. The arrival of foreign operators also brought dynamics to the sector which, today, is not far behind the rest of Europe with the exception of the market's own asymmetries and some conditioning factors that oblige us to look at the development of the business from a local point of view.

Statistics show that, in Portugal, a great majority of companies still rely on their own road transport fleets, with only a small percentage resorting to outsourcing. Indeed, in 1995, about 74% of the tonnage was transported by companies' own fleets as opposed to 26% using the public road transport services, in contrast to most of the rest of Europe and even to the community average[8].

The number of public goods vehicles was only 4% of the total number of licensed vehicles, although representing 17% of the total tonnage in circulation[9].

In any case, most of the road haulage firms are family businesses and few will have the opportunity to evolve into logistics service companies, either owing to cultural factors or through lack of vision or investment. In 1995, about 48% of all Portuguese road haulage firms consisted of 1 or 2 vehicles as opposed to 71% in 1989, which suggests that the corporate structure is changing[10]. Also according to data for 1995, about 30% of the international road haulage firms had fleets of over 20 vehicles, while about 8% had fleets of more than 50 vehicles[11].

In the Spanish market, strict regulation and excessive bureaucracy have affected the development of road haulage firms. The Spanish story is, however, the opposite of Portugal's, as about 80% of road transport is public and only 20% is private (tonnes.kilometre of goods transported)[12].

In addition, the companies are also very small in size. Over 95% of the firms have fewer than 5 vehicles and international activity represents less than 15% of the total[13]. Some of the logistics operators evolved from road haulage firms while others took on their own personality, having started off as logistics companies right from the beginning. When the large foreign logistics operators entered the Spanish market, they took over some of the few existing Spanish logistics companies. For example, Danzas took over SAD, Exel took over Sadema and Segarra was taken over by Mcgregor Cory[14].

Curiously and paradoxically, the market still consists of a large number of small companies and some of the Spanish operators are more active in Portugal than in their own country.

Nevertheless, some characteristics are common to the Iberian Peninsula. We have a large number of small road haulage companies, small and maximum size logistics service companies on an Iberian scale and the sustained growth of logistics operators often based on road transport. Most Portuguese operators grow by absorbing the activities and fleets of other companies, thus remaining securely anchored to road transport. In the Spanish market, although this also occurs, growth is mainly organic or through mergers.

The density of the population in both Portugal and Spain is lower than the rest of Europe, which means that transport costs are normally higher and the productivity of vehicles measured in kilometres per year per vehicle is therefore lower. The weight of the traditional distribution channels with their numerous outlets also raises transport costs and increases the specificity of the logistics services provided[15].

Traditionally, and the two markets have this in common, when subcontracting existed, it was only for transport. In the last few years, the trend is for subcontracting to extend to warehousing, the preparation of orders and inventory control.

3. ADAPTATION OF THIRD PARTY PROVIDERS: AN APPROACH

Although we think that the approach to the stages of logistics has its limitations, particularly because it is not applied universally and enables the same company to be in several different stages at the same time, not to mention the complexity of applying the stages to companies in peripheral markets with assymmetric characteristics, we recognise a very powerful instrumental character in this approach.

The methodology, and the conclusions to be drawn from it, can be applied to logistics either indirectly[16] or directly[17]. An analysis of the stages of logistics can also help us understand what stage of development third party providers will have to reach and, in addition, the types of services they should aim for in an attempt to allow their customers to upgrade their performance[18].

Stage I represents the situation in small, generically family companies which, either in Portugal or in Spain, do not outsource logistics activities. The exception is some transport services, particularly in the Spanish market. In this stage, the entrepreneur controls his/her business and works alone to make it a success. When the company shows a tendency to grow, the entrepreneur either loses control of the business or goes on to stage II.

In stage II, everything revolves around control and measurement. Typically, the company is functional and compartmentalised. Control is exercised mainly by diverting the budgets allocated to each department. In both stage I and stage II, the companies are not very integrated in terms of logistics and even in terms of the business itself, heading very fast towards excessively bureaucratic forms of control, which limit their performance and very often end up strangling the company itself. Thus, companies do not normally tend to outsource in stages I or II.

In those stages outsourcing is usually used if and when the company does not have sufficient knowledge of a particular area and only in the initial phases. Outsourcing is regarded as expensive and likely to cause management to lose control of the company system.

In stage III, although the organisation is normally functional, it seeks the business excellence. Great store is set by improving the departments and their performance. Logistical elements, like buying, inventory management or physical distribution are given great importance. The logistics departments are on the same level as the others and the obsession for service sometimes becomes a way of life. In this phase, on admitting that the company needs continuous improvement and sub-processes excellence, management eventually recognises the integrated and cross-functional role played by logistics[19].

After it has consolidated stage III, the company can move on to stage IV. Functional excellence gives way to process excellence. In this phase, with its integrative, cross-functional and processual character, logistics stands out clearly. To guarantee internal excellence, it is necessary to move on to external integration, to logistical pipeline management[20]. In this phase, the company needs integration of its processes and integration between processes[21].

In H+W stage IV[22], there is a link between the design of the product and the design of the process (and of the logistics service). Thus, in stage IV, the organisation concentrates on parallel, interactive development between products and processes. This phase requires intense concurrent engineering together with intense work on logistics. This means that the design of the product can be changed by the logistics requirements as inputs upfront[23]. These logistics inputs could take the form of real value added 'instruments', such as postponement activities or packaging specifications, for example. In this stage, it is absolutely essential for the third party providers to be able to support the company so that it can concentrate on its core-business.

Based on these considerations, and knowing empirically that the Iberian manufacturing companies that are in stage III are still behind those in the more fundamentally developed regions[24] as, indeed, are the retail companies[25], we need to know how to adapt the logistics providers to the needs of potential customers.

We know that most of the Iberian market consists of small companies in stages I and II. Thus, in view of their size, structure, location, financial weakness and other characteristics, the problem is knowing what types of services should be provided and how the Iberian third party providers should specialise if they are to be competitive and able to serve and complement their customers.

Some of the partnerships formed by transnational companies, or large Iberian companies, with third party providers from central or northern Europe are not going to prevent service providers of Iberian origin from being competitive. The reality actually shows that the large, foreign service companies are much better at managing operations in dedicated systems, with dedicated contracts in large-scale operations, but the asymmetries of the market and its intrinsic characteristics leave the way open for other types of services and companies of decisive importance in developing not only themselves but also their potential customers.

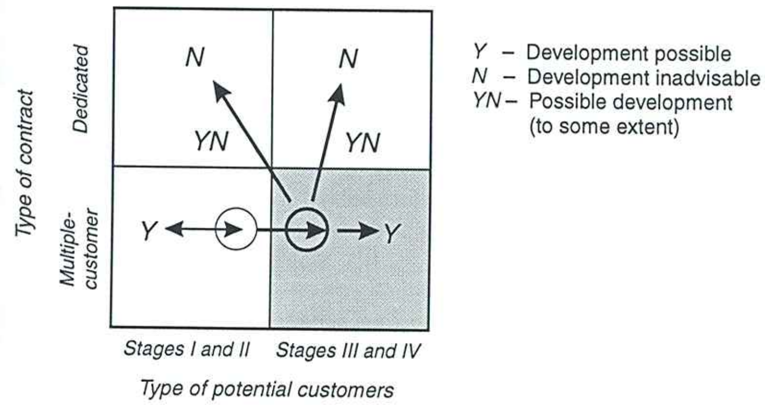
Although the most traditional transport services may bring some value added to their customers, today they are relatively easy to set up and micro-companies can offer the same, or better, with great flexibility and at low cost. Iberian third party providers today are well aware of, and understand, this factor.

If the small companies in stages I and II choose to resort to outsourcing, they will tend to use services on the spot market, where practically only the price component is relevant. But it is not these services that the third party providers should concentrate on, not only because they will find no real partnerships for possible transactions but also because they neither allow the customer company to develop nor support their own business.

As a result, it is necessary to seek value added activities outside this context which will not attract large operators, where dedicated operations are more common.

In terms of matrix approach we can suggest the kind of market shown in Figure I. The goal is not clearly defined, but can certainly be seen in the shaded part of the Figure.

Figure I



In addition, it is important to mention that, although some of these companies are anchored in transport services, possibly with large fleets, they need to develop into business areas where transport can function as one of a number of available activities and not the only one.

The type of third party providers that we have described should not be interested in competing directly with the large operators. Instead, they should take advantage of their knowledge of the market and their own particularities or singularities. They should thus concentrate on a regional rather than a global spectrum, meaning they should focus on the Iberian Peninsula and possibly other Latin countries and the Maghreb.

That limitation should not, however, prevent them from working throughout the European region if they have a large fleet, because some customers will use their services for obvious reasons related to the fact that their activities are located in a large number of different locations.

Iberian third party providers should thus position themselves as indicated in Figure I and also on the basis of figures II and III.

Figure II

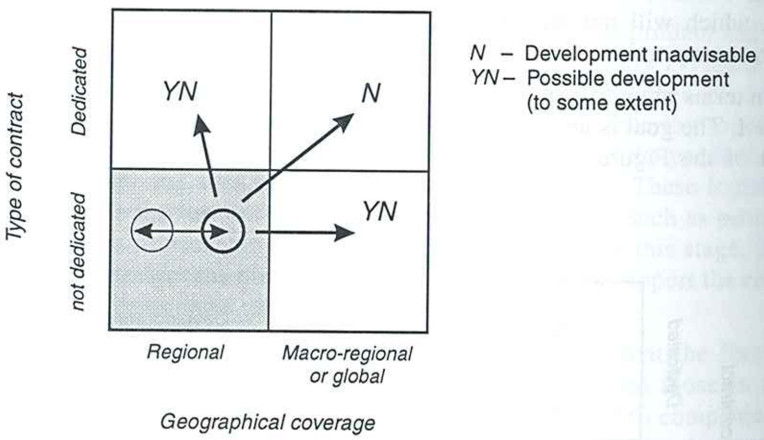
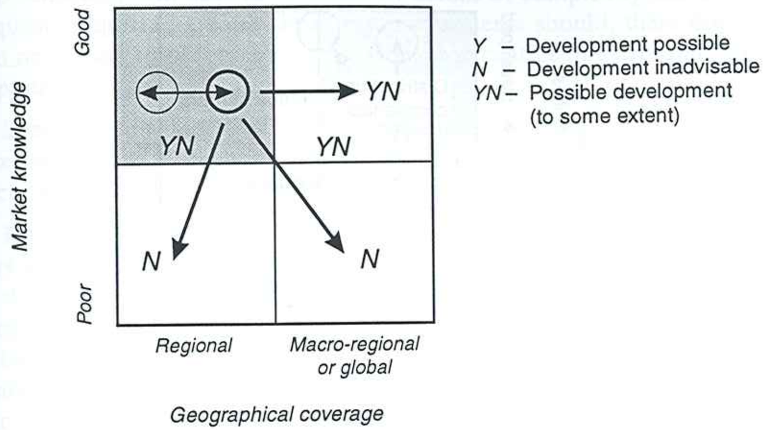


Figure III

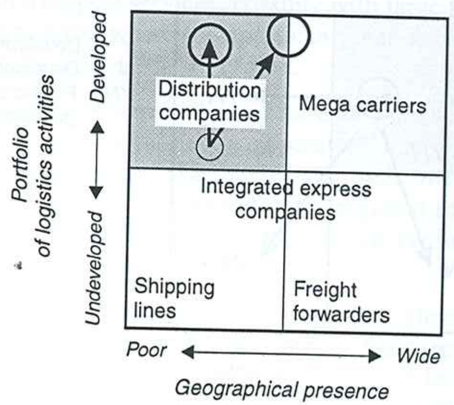


If we look at figures I, II and III together, we can see that the third party provider should concentrate on the following aspects:

1. Multiple-customer contracts on mixed platforms
   - seeking to specialisation.
2. Multiple-customer contracts with companies mostly in stages II and III
   - seeking to sustain their business and form evolutive partnerships bringing positive relationships to both sides through the development of customer companies and of the service provider itself, i.e., partnerships with growth potential.
3. Multiple-customer contracts of a mostly regional scope
   - seeking to take advantage of the smaller size of the peripheral markets, conjugating it with multiple-customer operations.
4. Multiple-customer contracts in known markets
   - seeking to specialise in this type of contract, capitalising on a profound knowledge of the markets.
5. Other alternatives shown by the conjunction of the permitted (Y) or the possible choices (YN) that do not go too far beyond specialisation in multiple-customer contracts.

We can see that our statements lead us to a possible meeting with figure IV[26] and the quadrant of the distribution companies.

Figure IV



Source: Cooper[27].

Their capacities should, however, be focused on the corporate tissue of potential customers and intent on the markets in which they operate. In other words, they should concentrate on customer companies who are manufacturers/wholesalers/ /retailers in that market and which are of small or medium size on a European scale and, also, in stages of development that allow the joint growth of the partnerships they have formed. They should also concentrate on large companies but which, not being manufacturers/ /wholesalers/retailers in the market, mainly due to the effects of centralisation, need advance inventory of their products to cover their commercial needs/sales.

But true success, in addition to the position they should adopt, will only come when these service providers have been determined and offer high standards of service and a prospect of integrated supply chain management.

The way to increase the integration of the supply chain may be to use the third party providers whose core competencies lie in distribution and, more and more, in information systems and technology[28].

A service provider focusing on multiple-customer contracts will, we believe, be more likely to develop in the area of information systems as it needs multiple interfaces and, necessarily, solutions.

Its contribution will lie in its capacity to make operations more efficient and effective and link the main flows of products and information. In changing the focus from push to pull, its contribution will be decisive.

The road is not easy, however. In a dedicated operation, it is easier to serve the customer and, at the same time, achieve economies of scale to sustain the business. In an operation with a number of customers, who are necessary to

achieve the same economies of scale as in a dedicated operation, precision and reliability will have to be added by means of complexity and the different requests requiring greater flexibility. Investments should, therefore, be focused on human resources and technology, true centres of skills and intellectual capital.

Specialisation has thus become compulsory and will tend to grow in the next few years[29]. This has meant that each operator has specialised in similar sectors of activity with highly intersecting standard characteristics.

It is therefore not advisable for operators to diversify too much in their sectors of activity or even in their range of customers. The answer will have to lie in their ability to specialise in a small number of sectors and in their broadening the range of services offered to these sectors. On the other hand, the pattern of specialisation in Iberian economy is well known. It concentrates mainly on traditional sectors like beverages, foodstuffs and tobacco, hygiene and cleaning, footwear and textiles, among others. The market accessibility and orographic, climactic and socio-economic characteristics are also well-known.

If we ignore sectors where there is already a tradition of operators from northern and central Europe, like the automobile industry, for example, we have to look for services that will satisfy customers and sectors that form evolutive partnerships.

This is the objective governing the construction of Table I.[30]

4. CONCLUSION

Development and the periphery are built mainly on the idea of distances in terms of road transport. It is an accepted fact that the Iberian Peninsula is becoming peripheral in relation to the centre of Europe.

The movement towards centralisation has meant that many factories and warehouses have left peripheral markets in favour of central locations giving rise to the trade-off with transport. From this point of view, in addition to the domestic and international road transport services they provide to their markets, third party providers will have to have arguments that will enable them to replace the physical presence of transnational companies in the market by providing services that can reach the final consumer. At the same time, it will be these companies, in some circumstances, that will, by means of outsourcing, be able to support the development of the Iberian companies in stages II and III of their evolution, by forming partnerships and growing with them.

Table I: Portfolio of Services to be Offered by Third Party Logistics Providers in Iberian Peninsula

Typical Iberian Industrial Patterns	Transportation	Warehousing	Systems' Capabilities	Others
Fmcg* industry (except retail)	– Logistics of refrigeration – JIT – Programmed deliveries – Reverse logistics – Backhauling management	– Multiple-temperature and multiple-customer warehousing services – Packaging and labelling – Pricing and tagging – Inventory management and control – Cross-docking – Reverse logistics	– Multiple customer service – Customised information reports – Customised orders – Billing and record-keeping procedures – EDI – Flexible systems – Ability to adapt and communicate with different information systems	– Merchandising – Possibly sales – ECR capabilities
Consumer Durables	– Return distribution – Local delivery – Home delivery	– Pricing, tagging and packaging – Kitting – Inventory management for multiple customers – Finishing/customising	– Multiple customer service – Order-entry installations	– Merchandising – Separate preparation of orders – QR/CR capabilities – Installation projects
Retail	– Return distribution – Home delivery – JIT – Backhauling management	– Pricing, tagging and packaging – Cross-docking – Inventory management and control	– WEB order management – Mail order management – Multiple customer service – Ability to operate with customers' systems – EDI	– Installation projects – ECR capabilities
Manufacturing	– JIT – Return capabilities	– Subassembly – Kitting – Sequencing	– Multiple customer service – Customised orders – Shipment and tracking	– Grouping – Multi-and Intermodal solutions – QR/CR capabilities

*Fmcg – Fast moving consumer goods

We feel that the determining factor affecting the sustainability of third party providers lies in their capacity to manage multiple-customer and multiple-product platforms, where they will have to develop distinctive skills both in terms of information systems and technology and of their ability to diversify their value added services. Third party providers will be examples of regional centres of skills in human capital and in offering complementary activities to customers. The size of the market and the orographic, demographic and climacteric factors will always play a special role and, with this model, will make it possible to create local skills.

It may happen that the service providers will become indispensable in peripheral markets with traditional standards and economic specialisations. They may be the ones that, for lack of sufficiently differentiated industries, can provide local support to the development of industries that are considered to have promise[31].

It would certainly be a reversal of the roles and an innovation in the market.

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São Tomé e Príncipe: Plataforma de serviços no Equador?

INTRODUÇÃO

O presente artigo tem por objectivo caracterizar sumariamente a economia da República de São Tomé e Príncipe (RSTP) e questionar algumas alternativas de desenvolvimento que parecem surgir no contexto do presente estádio de globalização da economia mundial. Como se concluirá pelo dados apresentados, a sobrevivência económica e política do país depende da ajuda internacional, mais ou menos camuflada em empréstimos incobráveis. A dependência é tal que qualquer estratégia de desenvolvimento dependerá da articulação da política de donativos com as exigências do investimento empresarial estrangeiro, num número reduzido de sectores prioritários. Para tanto, é necessário um amplo consenso sociopolítico, difícil de conseguir.

Grande parte dos dados foram-nos fornecidos pela Direcção de Estatística de São Tomé e Príncipe e pelo IUCAI, Instituto Universitário de São Tomé, com quem o ISCTE tem um protocolo. Uma colectânea de dados dos PALOP consta da recente publicação do INE, "Estatísticas da CPLP". Informação histórica, económica, sociológica e etnográfica do período anterior da independência consta de inúmeras publicações e comunicações. Um livro-chave é "A economia de São Tomé e Príncipe" do Dr. Jorge Costa Oliveira, editado pelo ICP e IICT em 1993.

I. CARACTERIZAÇÃO

1. A República de São Tomé e Príncipe (RSTP) é um pequeno país de 1001 km^2 constituído por duas ilhas — São Tomé e Príncipe — e alguns ilhéus, de origem vulcânica e muito acidentados. Está localizada no Golfo da Guiné, sobre o Equador (que o atravessa), a cerca de 180 milhas do Gabão. A população é jovem e maioritariamente alfabetizada (taxa de 63%), com 57% dos cerca de 135 mil habitantes abaixo dos 20 anos; a taxa de crescimento anual é de 2,2% e a esperança média de vida de 67 anos (estimativas de 1996)[1]. A densidade populacional é a maior dos países da CPLP.