

# Pushing the Digital Transformation of Logistics: A Tri-Continental Study of Regulatory Environments

## BACKGROUND AND MOTIVATION

- Logistics accounts for 11% of global GDP.
- The digital transformation fundamentally changes society – logistics in particular via trends such as automation, data analytics, and telematics.
- Logistics is falling behind on the digital adoption curve.
- Regulation potentially plays a crucial role in facilitating and structuring the digital transformation.

## OBJECTIVES



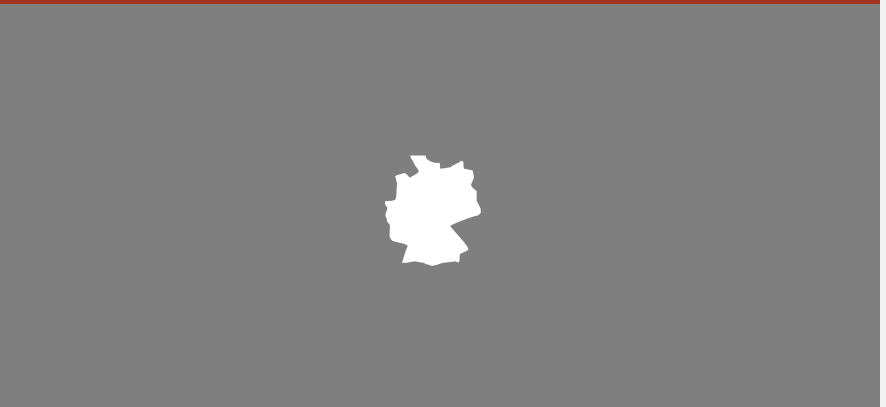
- What **priorities, focus areas, and trends** do executives in the logistics industry see?
- In what ways are **governments intervening** to promote the digital transformation of the logistics sector?
- Which **public policy initiatives** exert the greatest influence on the digital transformation of logistics?

## METHODOLOGY

- Grounded Theory.
- So far 17 interviews across three continents.
- Comprehensive sample of shippers and LSPs.

## PRELIMINARY KEY INSIGHTS

- **Supply Chain Visibility** emerges as a universally prioritized goal in all three countries.
- **Autonomous Vehicles:**
  - Crucially important and inherently viable in Australia.
  - Reservation in Germany.
  - Skeptical in USA.

	USA	Australia	Germany
			
Size	9.8 m km <sup>2</sup>	7.7 m km <sup>2</sup>	357 k km <sup>2</sup>
Population	326 m	23 m	80 m
GDP	\$ 19.36 T. tn.	\$ 1.2 T. tn.	\$ 4.15 T. tn.
Logistics Sector	8% of GDP	8.6% of GDP	7% of GDP
Hot Digitization Topics	<ul style="list-style-type: none"> <li>▪ Supply Chain Visibility</li> <li>▪ Telematics &amp; Big Data</li> <li>▪ Information Security</li> </ul>	<ul style="list-style-type: none"> <li>▪ Supply Chain Visibility</li> <li>▪ Autonomous Vehicles</li> <li>▪ Telematics &amp; Big data</li> </ul>	<ul style="list-style-type: none"> <li>▪ Supply Chain Visibility</li> <li>▪ IT Talent</li> <li>▪ Automation</li> </ul>
Approach to Policy	<i>Hands off!</i>	<i>Standardize!</i>	<i>Infrastructure is needed!</i>



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