

# 2014 DHL GLOBAL TECHNOLOGY CONFERENCE

July 2014



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# 2014 DHL GLOBAL TECHNOLOGY CONFERENCE

## Growth, Efficiency & Innovation

**What are the future growth opportunities for the Technology sector? How can the industry's supply chains become more efficient? And, which new innovations will impact the Technology sector supply chains of the future?**

These were just some of the questions that more than 250 attendees discussed during the 2014 DHL Global Technology Conference.

Under this year's conference theme of '**Growth, Efficiency and Innovation**', speakers and attendees exchanged on topics such as fast growing markets, nearshoring, online retailing, efficiency programs, multi-user warehouses, managed distribution networks, new technologies for the supply chain, and many other topics throughout plenary presentations and breakout sessions.

Beside the lively discussions on market trends and their implications on the supply chain, the event also created a unique opportunity for networking amongst the supply chain executives of the Technology Sector, many of them attending the DHL Global Technology Conference already for many years.

### DEUTSCHE POST DHL STRATEGY 2020

As I mentioned during the opening session, DHL is always thinking ahead, foreseeing the needs of the market and continuously investing to develop new solutions. Good example of the shift that's currently underway in supply chain strategies are the acceleration of eCommerce and the growing demand for last-mile solutions.

Both the logistics industry and the technology industry are highly dynamic. That's why DHL is investing in fast-growth markets ahead of demand. By having the efficient and proven responses to new market needs, we can help to shape and positively impact tomorrow's technology industry.

This publication seeks to summarize the main discussion points and findings of the 2014 DHL Global Technology Conference. I hope it serves as a reminder of all the useful information that was shared, and I trust it fires your enthusiasm to achieve greater 'Growth, Efficiency, and Innovation' in the year ahead.

Sincerely yours

Ken Allen

CEO DHL EXPRESS

Executive Board Sponsor – Technology Sector



Ken Allen, DHL

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# DYNAMICS OF THE TECHNOLOGY SECTOR

## **"It's going to be a wild ride"**

At various points throughout the conference, speakers and delegates referred to many different technology sector trends. Here are just a few highlights.

### DYNAMICS OF THE TECHNOLOGY SECTOR



David Pogue, Technology Columnist

*"The simple concept of putting an always-on internet device in your pocket creates new possibilities that have never existed before."*

David Pogue

In a sharing economy, the wisdom and capacity of a crowd of people has become a strong lever for effectively solving business problems. **David Pogue**, host of NOVA ScienceNow and Yahoo Tech Columnist, spoke about how disruptive technologies are changing business models and impacting the way our organizations will operate in the future. For example, the famous app Uber that allows users to call for a car service

with a single tap on the phone's screen has an even more "social" version that allows calling for ordinary people in their own cars called UberX. Airbnb, facilitates renting someone's home instead of a hotel and when this might sound like an idea of a start-up that will not grow, the site has facilitated 11 million nights of lodging by June 2014. Furthermore, Parking Panda allows renting out your garage or driveway.

"I am interested in how gadgets affect society and culture, especially now when things are moving faster and faster and faster. Some technologies that are being developed currently are here to stay and the others are just crap. But we have to try and invest in innovation to be able to see what are those 20% that will be a success."



Follow the trends: [yahoo.com/tech](http://yahoo.com/tech)

*"Looking into the future, I cannot tell you which technologies will win, or which technologies will be with us 5 years from now, but I can tell you one thing: it's going to be a wild ride!"*

David Pogue



How will apps and online communities influence logistics? This is not a question anymore, as it has already done so. One example comes from DHL: MyWays – new last mile delivery service.

The idea is simple: commuters, taxi drivers, or students can be paid to take over last-mile delivery on the routes that they are traveling anyway. They use an online platform to either pick parcels that fit their ways or set an alarm for each parcel that becomes available in an area chosen by them. Scaling up the number of these affiliates to a large crowd of occasional carriers effectively takes load off the delivery fleet.

Despite the fact that crowd-based delivery has to be incentivized, it has potential to cut last-mile delivery costs, especially in rural areas and megacities. A real-time data stream is traced in order to assign shipments to available carriers, based on their respective location and destination. Interfaced through a mobile application, crowd affiliates publish their current position and accept pre-selected delivery assignments.

This app is called MyWays and is piloted at the moment in Sweden: [www.myways.com](http://www.myways.com)

# TRENDS – IMPACT OF MARKET PLACES AND MOBILE

## Keeping Pace with Change

### MARKETPLACES ARE EATING THE eCOMMERCE WORLD

**Paul Colluci** of ChannelAdvisor described changing consumer buying behaviors and claimed that marketplaces are eating the eCommerce world. He proposed that market dynamics are best understood by comparing growth, investments and innovation in brick&mortar marketplaces with online marketplaces. The changing consumer buying behaviors become obvious looking at the eCommerce holiday growth, which had been about 3-times higher than with traditional retail channel.

Fueled by the introduction of free shipping and third-party marketplaces, and supported by a highly efficient fulfillment network, Colluci explained how Amazon has become the leading online retailer and is nearly able to claim No.2 position among all retailers in 2014.

He claimed that the eCommerce landscape is likely to be dominated by marketplaces that provide broad selection, better value, high convenience (especially with fast and free shipping), and user ratings of seller performance which generates high customer confidence. Customer buying behaviors are changed by this new type of marketplace – today 33% of eCommerce in the US is transacted on these types of marketplace; in China the figure is already 90%. Colluci also noted that mobile adoption is on the rise and will further accelerate these trends.

In addition to these marketplaces, Colluci claimed that social networks such as Twitter and Facebook are likely to play an important role as well. He also noted that there would be an increase in cross-border trade, bringing with it more agile approaches and substantial new opportunities.



Paul Colluci, ChannelAdvisor

### THE IMPACT OF MOBILE ON SUPPLY CHAIN MANAGEMENT

According to **Anand Chandrasekher** of Qualcomm “Mobile is the largest technology platform and we are still in an early stage of the development”. Citing the fact that Qualcomm has seen a 21% annual shipment growth in recent years, which has made the company No.1 in all leading mobile semiconductor technologies, Chandrasekher noted this brought with it greater complexity in terms of product variation, customer landscape and the supporting supply chains. He noted that supply chains must now be fast, flexible, scalable, proactive, reliable and cost efficient.

Qualcomm’s major improvements in planning and sourcing processes have resulted in some best-in-class industry KPIs (inventory days on hand are now 55 days; ship to commit is now at 98%). Chandrasekher claimed this could only be achieved through close collaboration with suppliers and customers.

Wireless infrastructure will profoundly impact development of the Internet of Things, particularly capabilities in device-to-device communication. Chandrasekher



Anand Chandrasekher, Qualcomm

described Qualcomm’s role as pushing wireless boundaries, driving device evolution and creating a “digital six sense” to mobilize technology in fostering development of new applications and services.

### CHALLENGES AND SOLUTIONS FOR THE TECHNOLOGY SUPPLY CHAIN

A DHL panel explored the trends related to Growth, Efficiency and Innovation that are impacting technology supply chains. They concluded, that to capture growth opportunities, technology organizations particularly require solutions for product launches and exploring new markets. They also found that to achieve higher efficiency levels technology organizations must take into account the end-to-end supply chain, and often will need to adopt new concepts and accept more radical changes. The panel also found that innovations such as big data, the Internet of Things, augmented reality and 3D printing are likely to play a critical role in technology industry supply chains of tomorrow. Delegates had the chance to learn more about what DHL is doing to support customers to achieve their objectives.

# SUCCESS IN HIGH GROWTH MARKETS

## Doing Business in Latin America

**Growth is fundamental to the dynamic technology industry, as companies seek to capture new high-growth markets and increase their customer base with new product launches.**

**It's therefore extremely worthwhile to consider the challenges and solutions for doing business in high-growth markets. Attendees came up with some great ideas while thinking about growth challenges and solutions, with specific focus on the Latin American region and by making use of multiple customer cases.**

### TRENDS & CHALLENGES IN LATIN AMERICA

Latin America is full of opportunities, and has an increasingly tech savvy population that's demanding more and better goods and services. The political situation is stabilizing and the economic fundamentals are improving. However, from the supply chain point of view, this continues to be a challenging region due to its developing infrastructure, security issues, and regulatory frameworks.



Roger Ingold, Accenture

Opening the Growth topic in the plenary sessions, **Roger Ingold** of Accenture talked about overall trends and challenges in Latin America, describing this as a diverse region, with countries at different stages of development yet sharing common education and infrastructure challenges, e.g. operational costs see a 25% increase due to poor conditions of Brazilian roads.



Alongside traditionally strong sectors such as mining and oil, increasingly diversified Latin American economies are developing, driven by innovation and entrepreneurship. Global integration is now supported by new trade agreements (for example, China and the new Trans-Pacific Partnership). Consequently, the share of exports to Asia Pacific has reached 18.3% in 2012 from only 8.8% about 10 years ago. And partnership is certainly a critical success factor, as it enables companies to learn from other organizations to better understand local markets and build new business models.

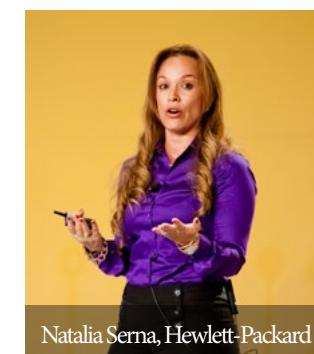
### LEARNING FROM CUSTOMER CASES

**Horacio Chavez** of Lenovo talked about the strategic decisions taken by Lenovo in the Latin American market. Driven by

aspects of nearshoring and the complexity of local markets, the company invested in in-house manufacturing both in Mexico and Brazil. Very often incentives on tax and duties drive manufacturing to unusual places; for example, to places such as Manaus in Brazil and Tierra del Fuego in Argentina. On the flipside, manufacturing in these remote places triggers higher complexity and costs in the supply chain.

**Natalia Serna** of Hewlett-Packard presented on best practice market approaches in Colombia, Chile, and Ecuador, identifying a clear shift towards more international direct-ship solutions. **Amar Ramudhin** from Supply Chain Venture focused on the increasing importance of Panama as a logistics hub to serve American markets. Its unique geographic position allows serving two oceans with one port.

All of these speakers agreed that the key challenges in Latin America continue to be developing infrastructure, security, and regulatory frameworks. Having said that, these challenges also represent a genuine opportunity – companies that can actively master these challenges are likely to achieve growth in the Latin American market.



Natalia Serna, Hewlett-Packard



Horacio Chavez, Lenovo

# GROWTH – BREAKOUTS

## Supply Chains in Brazil, Mexico and Panama

Over the two days, there were three different breakout sessions on the topic of growth, each referring to a specific Latin American growth market: Brazil, Mexico, and Panama.

### BRAZIL – SUPPLY CHAIN SOLUTIONS FOR A CHALLENGING GROWTH MARKET

Complex taxation, labor legislation (particularly employee rights), talent scarcity in some geographic regions, and the high cost of risk management for technology companies were some of the topics that **Roger Ingold** addressed during this breakout session. Furthermore, many of the logistics and infrastructure challenges are caused by one thing: the fact that the road network is the main way of moving products locally.

Based on this, the discussion centered on how DHL can best support technology companies in Brazil to overcome import duty and tax challenges. An 'end-to-end' visibility customs-compliant tool for materials brought from Asia to Brazil, including the final mile to the customer, was one of the solutions that emerged from lively discussion.

### MEXICO – NEARSHORING AND CROSS-BORDER SUPPLY CHAINS

Moving supplies and finished goods across U.S. and Mexican borders is a necessity for many companies. But sourcing and manufacturing in Mexico is not without its challenges. Security, customs compliance, and border congestion all have the potential to wreak havoc on the supply chain and prevent shipments from reaching their destinations securely and on time.

**Fred Hartung** of Jabil presented a simulation model, highlighting the way in which different key factors such as inflation, salaries, taxes, and the exchange rate can change

nearshoring decisions. Everyone agreed that Mexico is becoming more attractive for nearshoring, but the answer to whether it's appropriate in all cases was a resounding "It depends!" – the dependencies being the type of technology product, the market to be supported, and the region selected.

### PANAMA – GATEWAY TO LATIN AMERICA

Panama is becoming increasingly important as a logistics hub to serve the Latin America region. Free trade zone regulations, corresponding infrastructure investments and multiple tax benefits have made Panama an attractive supply chain platform for numerous companies.



Fred Hartung, Jabil



Monica Di Yin, JVCKenwood

**Amar Ramudhin** and **Monica Di Yin** of JVCKenwood shared their experiences on how to successfully operate supply chains in the country. Beside its strategic location, additional advantages include the fact that Panama supports multimodal solutions for the Americas, not just ocean freight. Indeed, the country has already developed its infrastructure ahead of many others in the Latin region, and continues to expand.



### PATH TO GROWTH:

SHAPING TECH SECTOR SUPPLY CHAINS IN EMERGING MARKETS

June 2014

By Lisa Huntington, President, Huntington Group LLC and  
Associate Director, Supply Chain Management Center,  
Robert H. Smith School of Business, University of Maryland  
In collaboration with Ian Thilo Kahlhaus, Vice President Strategy  
& Business Development, Global Technology Sector, DHL Supply Chain



Following the conference, DHL has published a white paper on 'Shaping technology sector supply chains in emerging market'. Key recommendations are to

- a) manage risk through a scalable and flexible approach to market penetration,
- b) to prioritize compliance and quality from the start, rather than low-cost quick fixes and to
- c) avoid a "one size fits all" market approach.

If you want to read more about it, click [here](#).

# LEVERS TO DRIVE SUPPLY CHAIN EFFICIENCY

## Learning from Customer Best Practices

The technology industry boasts some of the world's most efficient and flexible supply chains, but still greater efficiency is required to cope with product commoditization, price deterioration, and changing buying behaviors. Delegates examined levers such as lean programs, multi-user warehouses, managed distribution networks, and integrated technical services.

### EFFICIENCY IN SERVICE SUPPLY CHAINS

For **Tom Maher** of Dell focus and direction are required to achieve efficiency. For the aftermarket supply chain, this means keeping things simple and affordable so you can react to changing technology, products and customer requirements. The service supply chain is never linear but complex with many potential points of failures. High efficiency in services must be designed end-to-end and from the customer lens as this can

drive superior customer satisfaction. Maher encouraged the strategy of "Being Connected" to customers via social media, using new technologies such as mobile apps for field engineers and a regional all-in-one strategy to improve proactivity and process efficiency in meeting customer expectations.

### DRIVE UTILIZATION AND FLEXIBILITY – EUROPEAN CASE STUDY

Panasonic's **Nigel Cowmeadow** reviewed his company's challenges and the need to move from a fixed to a variable cost supply chain model. Key drivers for this new strategy have been cost reductions caused by innovation – these have fundamentally changed business processes and removed complexity. The supply chain transformation at Panasonic has included a reduced warehouse network, multi user warehouses, managed transportation and more direct ship



solutions. The result has been more than a USD30 million cost reduction over the last three years, based on a more flexible supply chain with higher cost variability.

### SUPPLY CHAINS FOR THE CLOUD

Dramatic changes in the enterprise storage market driven by cloud computing and IT supply chain challenges were addressed by **Paul Goodman** of EMC. He noted higher diversity in supply chain sources which drive complexity and the need for more merge in transit points in the network to ensure consolidated shipping to customers with complete documentation and labeling. Goodman's key recommendations for managing efficiency in the supply chain in cloud are to remember the importance of master data, consider visibility before utility, and maintain focus on global risk and trade management.



# EFFICIENCY – BREAKOUTS

## Optimization Potential for the End-to-End Supply Chain

The delegates took advantage of the many different breakout session on Efficiency to learn directly from customer cases, share own experiences and challenge each other in creating new ideas and solutions for the sector.

### LEAD LOGISTICS PARTNER – A RESILIENT MODEL TO SUPPORT GROWTH AND EFFICIENCY

Not only must businesses do more with less today, their customers also expect more. Given the increasing strategic importance of the supply chain, the answer cannot be to apply traditional approaches to new and growing demands. A Lead Logistic Partner Concept (LLP) acts as a catalyst, instigating and managing change across the supply chain, meeting business challenges, and creating core competitive advantage.

So how can LLP partners help to deliver a response to the broad challenges of growth, efficiency, and innovation? When polled, 80% of attendees saw LLP as an effective tool for improving supply chain efficiency and supporting business growth. Delegates discussed the barriers to LLP adoption and potential mitigations to it, e.g. to stay in control adopting an LLP model. Looking at managing the end-to-end supply chain, over 75% of attendees viewed supply chain risk as a critical challenge for their organization, and were interested to explore the practical innovation of the [DHL Resilience360](#) tool.

### SUPPLY CHAIN TRANSFORMATION – ‘LEAN’ PROGRAMS

Microsoft's **Henry Ho** and **Tero Lunella** hosted with DHL this well-attended breakout session. Delegates reviewed and interactively benchmarked different levers and approaches to managing a supply chain transformation program, supported



with insights on how Microsoft Mobile used a lean approach to improve its end-to-end distribution supply chain. Some 60% of attendees said they intended to transform their supply chain within one year. Cost reduction was a top priority, with target savings of up to 20%. There was a variety of perspectives on how to transform the supply chain.

Attendees validated the benefits and approach of 'lean', and all agreed that cultural change is critical to the success of a 'lean' transformation. They agreed that working with key players in the supply chain is essential for success of the 'lean' journey.

### SERVICE LOGISTICS – CREATING THE NEXT GENERATION

Attendees learned how service logistics at DHL is not only about servicing customers in critical repairs, but also about providing support in planning, mapping, and alignment of inventories. The session was supported by **David A. Hogg** of IBM and enabled delegates to examine their requirements for the next generation of service logistics using sophisticated



IT platforms. They discovered that the DHL Service Logistics Network of more than 1,000 sites consists of both DHL and non-DHL owned locations, all on one platform and operating standard, creating a single, seamless solution. The DHL ecosystem is modular (allowing customers to pick and choose services) and supported by DHL's single global platform. Inventory ownership models are part of the DHL Service Logistics offering, and delegates asked for specifics on how a transfer of inventory ownership via DHL would translate into off-balance sheet financing.

### TECHNICAL SERVICES – INCREASE VALUE WITHIN YOUR SUPPLY CHAIN

Supported by strategic partner, Computer Technology Solutions, the DHL Technical Services team delivered a breakout session to examine how the integration of technical services can lead to higher flexibility, significant cost savings, and reduced turnaround times. The session highlighted that

configuration and customization are the most value-add and yet also the most value-missed pre-sales technical service. It also revealed that recovery is the most value-add aftermarket technical service while repair is the most value-missed aftermarket technical service. During this breakout session DHL undeline the option to work with its own and customer partners, integrating and managing other parties as required.

#### GREEN LOGISTICS – TRANSFORMING STRATEGY INTO ACTIONS

The Session addressed key trends in sustainability and environmental protection, providing examples of turning strategy into action. **Judy Glazer** talked about Hewlett-Packard's re-engineered supply chain and cargo movement to reduce CO<sub>2</sub> emissions and improve supply chain efficiency.



Judy Glazer, Hewlett-Packard



Wendi Latko, Xerox

**Wendi Latko** of Xerox Technology presented their consumer waste strategy for consumables which includes investment in a waste-free returns process. DHL shared its aggressive goal of reducing greenhouse gases by 30% by 2020 from its 2007 benchmark. Speakers agreed that collaboration, discussion on regulations and ideas sharing are essential to achieving green supply chains, and a key take away for delegates was that company organization and structure must change to incorporate purchases of green logistics. In a poll, 60% of attendees were willing to consider new, non-

traditional commercial models with logistics suppliers, the implication of which is that longer contracts and different types of agreements are likely to become a feature of green logistics initiatives.

#### ONLINE RETAILING – THE JOURNEY TO SUPPLY CHAIN EXCELLENCE

With the observation that manufacturers in the technology industry haven't yet engaged in online opportunities to the same extent as other industries, the session went on to examine cross-border solutions, duties and tax complications (customs), and identified that returns platforms continue to be problematic for online retailing.



Online Retailing – discussing best approach

Delegates observed a varying share of returns in B2C across different countries (for example, MX 2% vs. DE 15%), and that technology companies typically own only a low share of online sales via their own webshops (12%). They were introduced to the [DHL iCart](#) international Software-as-a-Service shopping cart solution which enables easy cross-border retail.

Discussion also focused on the disappearance of borders between online and offline channels, as customer now think about creating multi-channel supply chains. Key issues were identified: dealing with returns in the cross-border B2C segment, reaching more remote areas, and dealing with

large-size B2C goods. Delegates discovered the benefits of partnering with DHL, with its global scale and capabilities, to capture new eCommerce opportunities.

#### MULTI-USER WAREHOUSES – FLEXIBILITY, SCALE & CAPABILITY UNDER ONE ROOF

A clear majority of attendees at this breakout session were already leveraging multi-user warehousing and were very interested in new concepts to support technology supply chains. Attendees wanted to learn more about fully-integrated services hubs (end-to-end offerings that include pre-sales and aftermarket value-added services) and special-purposes hubs (multi-user hubs focused on spare parts or high-speed end-of-runway hubs).

Other areas of interest included building larger warehouses to leverage scale, introducing automation and new technologies, and achieving a single interface to offer multiple services and capabilities under the same roof.

Attendees also supported co-locating specialist third-parties (e.g., repair/recycling partners) and express, freight and forwarding providers, and – for reasons of efficiency, flexibility and best-practice sharing – DHL's concept of creating a global network of same standard, multi-user warehouses at selected key gateway locations, offering end-to-end services and multi-mode connectivity.



Multi-User Warehousing: New concepts

# COMPETITIVE ADVANTAGE THROUGH INNOVATIVE TECHNOLOGY

## New Technologies shaping Supply Chain

**Innovation is bringing technology supply chains to the next level. Delegates examined the new trends, systems, and technologies that are driving supply chain optimization. Keeping ahead of developing trends is a hallmark of DHL's approach to innovation. This third key theme of the conference certainly proved highly popular with delegates.**

### DHL LOGISTICS TREND RADAR

The parcelcopter, or the drone as it is known by the market, was first used by DHL in a delivery test run in December 2013. The flight lasted two minutes and the remote-controlled drone carried a batch of medicine from a pharmacy in the city of Bonn across the Rhine River to the DHL Headquarters.



Model of the DHL Parcelcopter

This is just one of the many innovations DHL is looking into. Other new technology and society trends that are (or will soon be) impacting the supply chain include crowd logistics, big data, augmented reality, low-cost sensor technology, autonomous logistics, and 3D printing. The work does not stop with the research on new developments in the DHL Logistics Trend Radar. The objective is to reach a proof of

concept for selected logistics applications. DHL's Markus Kückelhaus highlighted a number of fascinating trend applications and introduced numerous use cases, where DHL is actually piloting new supply chain solutions.

### THE POTENTIAL OF SENSORS

DHL has realized the potential of low-cost sensors in logistics. The corporate phenomenon of 'bring your own device' was originally triggered by employees expecting their work devices to provide the same functionality as their personally owned, consumer smartphones and tablets. These consumer electronic devices are equipped with a high number of sensors to capture the environment – the rate of acceleration, position, light, language, and much more. Because of this, these sensors are now being mass produced and their price has significantly decreased. Logistics typically requires use of multiple sensors across large networks, so these lower price points effectively enable sensor use in logistics for the first time.

*"Sensors became very cheap and now it's time to make use of them and apply them in the logistics environment"*  
Markus Kueckelhaus, DHL

### COMPETITIVE ADVANTAGE THROUGH INNOVATIVE TECHNOLOGY

"The only sustainable advantage is innovation. It needs courage and creativity to get out of the comfort zone" said **Paul Steinberg** of Motorola Solutions citing customer research, fast learning, and creativity as key drivers for innovation. Steinberg described advancing the intelligence



Paul Steinberg, Motorola Solutions

edge as getting the right information to the right person at the right time in the right way. He suggested that communication will evolve from 'one device per communication method' to unique applications available on a single device, and

*"I think we are in the age of experience; I think it's about rendering an experience that is compelling to a customer"*

Paul Steinberg, Motorola Solutions

ultimately to a situation in which devices and technology become irrelevant. He explained that tomorrow's hands-free solutions will advance to optimize productivity and performance, anticipating wearable augmentation that allows hands-free, heads-up operation so employees can move freely, able to receive visual data and capture data in new ways.

# INNOVATION – BREAKOUTS

## Experience New Technologies First Hand

Again, the breakout sessions on Innovation allowed delegates to get a deeper understanding on new technologies and developments in IT systems presented by industry experts.

### NEW TECHNOLOGIES – FUTURE SUPPLY CHAINS

The technology industry is driven by innovation and many inventions impact the development of future supply chains.

**Markus Kueckelhaus** continued his plenary presentation with a deep dive breakout on technologies that are already impacting the supply chain. Attendees were introduced to the why and how of trend research, and identified some of the top trends. One of these is augmented reality (AR).

**Alexander Oser** of Metaio introduced real-life examples and live demonstrations, along with a discussion of current capabilities and limitations. Attendees discussed how to apply AR in the supply chain, and debated which of the presented use cases would be most feasible and appropriate for further development – they selected optimized picking, assembly & repair, and international trade.

### SUPPLY CHAIN IT SYSTEMS – FUTURE DIRECTION

The four big IT trends Mobile, Cloud, Big Data and Social in combination with the specific needs of an industry sector such as Technology drive the IT strategy for DHL Supply Chain. Transport and Warehouse Management Systems are key modules to create flexible, agile and cost-efficient IT solutions. Strong Partnerships are the basis for a successful delivery. **Sundar Swaminathan** of Oracle and **Peter van Merode** of JDA provided updates on the most recent developments in warehouse and transport management



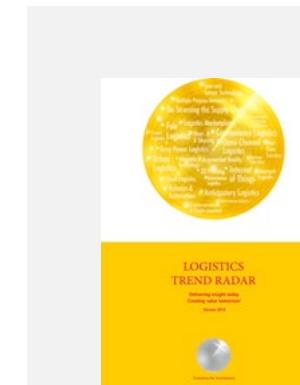
Markus Kueckelhaus, DHL



Alexander Oser, Metaio



Experience new technologies first hand



Logistics Trend Radar



Augmented Reality



Big Data



Low Cost  
Sensor Technology

systems supported by their organizations. Attendees identified their top IT challenges as supply chain IT costs, the speed of IT solution development, and IT to support their operational processes. Subsequently, they also identified three key areas for future IT focus and investment: process standardization, solutions for globalization and emerging markets, and cloud.

Learn more about new technologies and future trends that are influencing the supply chain world. These white papers explain how you can take advantage of opportunities as they arise, many of which are currently untapped.

# SOLUTIONS FOR THE TECHNOLOGY SECTOR

## DHL Capabilities showcased at the Conference

Very closely related to the topics of the conference, DHL has displayed relevant supply chain solutions for the technology sector in the trade fair area. DHL experts were happy to answer questions about specific value propositions and explain how these solutions could contribute to the tech supply chains. If you would like to further engage with the different responsible, you can find the names of each solution lead in the summary below:

### SERVICE LOGISTICS

Service Logistics provides tailor-made solutions for the global aftermarket. Mission critical is our strength, delivering spare parts and swap units, and offering return and repair services in more than 140 countries. We deliver service excellence by combining global management with adherence to business rules and any local requirements.

Contact: [Leonard Aerts](#), DHL Supply Chain



### TECHNICAL SERVICES

As your pre-sales Technical Services partner, DHL can help you reduce lead times, cut costs, and enhance your scope to deliver flexible product configuration. As your lead reverse logistics provider, DHL offers a fully managed aftermarket Technical Services solution to ensure you respond faster, resolve issues, maximize value, and improve end-customer satisfaction.

Contact: [Mark Watson](#), DHL Supply Chain



### DHL SAME DAY

It is never too late. DHL Same Day offers solutions for emergency and time-critical deliveries, with maximum speed and flexibility. This is a service that is offered day and night, and on weekends and public holidays.

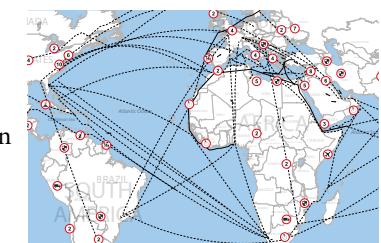
Contact: [Steven de Brabander](#), DHL Global Forwarding



### DHL RESILIENCE360 – SUPPLY CHAIN RISK MANAGEMENT SOLUTION

A targeted risk assessment exposes your supply chain vulnerability in over 20 risk categories, rates resiliency of individual locations, and identifies risk hotspots and appropriate risk mitigation. DHL also provides a supply chain incident monitoring platform for near real-time tracking of incidents capable of disrupting your supply chain.

Contact: [Tobias Larsson](#), DHL CSI



### LEAD LOGISTICS PARTNER

Our outsourced supply chain management solution includes control tower functions to manage daily operations, as well as management functions, such as supplier management, freight audit, supply chain optimization, and sourcing.

Contact: [Paul Parry](#), DHL Supply Chain and [Gerald Cross](#), DHL Global Forwarding



### MULTI MODAL SOLUTIONS

DHL offers environmentally friendly Multi Modal Solutions from Asia to Europe via integrated rail and road transportation. Our services ensure full security and temperature-controlled transit, as required.

Contact: [Zafer Engin](#), DHL Global Forwarding



## Solutions for the technology sector

### ONLINE RETAILING

Online Retailing continues to evolve from its infancy in single-channel commerce to multi-channel and now cross-channel commerce, and buyers are actively taking the market to omni-channel. Is the new concept of 'relevance commerce' coming into focus for you and your business? DHL can support with a better understanding of how your company can capitalize on these growing trends.

Contact: [Carl Hemus](#), DHL Global Mail



### B2C POSTAL DELIVERY

Taking advantage of worldwide postal networks offers online retailers just the right level of cost efficiency while meeting customer delivery needs. DHL offers B2C deliveries in over 220 countries and territories worldwide, starting right here in the US through our long-term Workshare partnership with the United States Postal Service (USPS).

Contact: [Brad Mathewson](#), DHL Global Mail



### iCART – FULLY LANDED COST SOLUTIONS

In today's complex international shipping market, success is determined by a retailer's ability to navigate duties, taxes, and foreign currencies at the time of transaction with the consumer.

The iCart solution can help your business navigate these complex waters.

Contact: [Steve Froehlich](#), DHL Global Mail



### SUPPLY CHAIN IT SOLUTIONS

Information processing is the backbone of every supply chain. For a smooth and efficient supply chain, you need industry-leading, state-of-the-art IT solutions. DHL Supply Chain IT provides flexible, agile IT solutions that will help address your needs and those of your customers, irrespective of location or sector. With our IT solutions, you can focus on making your business more effective, keeping your promises to your customers, and leveraging competitive advantage.

Contact: [Mike Pleass](#), DHL Supply Chain



### EXPRESS CAPABILITIES

DHL Express is the indisputable industry leader with a global network that provides capacity and reach across more than 220 countries and territories. A range of services and industry solutions will enable delivery of your shipments at reliable speed, based on your specific requirements.

Contact: [Stefan Lanckvind](#), DHL Express



### FREIGHT CAPABILITIES

DHL Freight offers standard LTL and FTL solutions across Europe, the Middle East, and North America. Specialized capabilities for the technology industry include services such as high-value transport services and direct distribution solutions.

Contact: [Volker Bargenda](#) and [Mark Workman](#), DHL Freight



# SPEAKER LINE-UP

## Plenary Speakers & Panelists

**AMAR RAMUDHIN**

Partner  
Supply Chain Ventures

**ANAND CHANDRASEKHER**

Senior Vice President Business  
Development  
Qualcomm

**DAVID POGUE**

Host of NOVA  
ScienceNow  
Yahoo Tech Columnist

**HORACIO CHAVEZ**

Director  
Global Operations  
Lenovo

**MARKUS KUECKELHAUS**

Director  
Research & Development  
DHL

**NATALIA SERNA**

Executive MCA  
Logistics Manager  
Hewlett-Packard

**NIGEL COWMEADOW**

Chief Supply Chain Officer  
Panasonic Europe

**PAUL COLUCCI**

Vice President  
Enterprise Sales  
ChannelAdvisor

**PAUL GOODMAN**

Senior Director  
Global Logistics  
EMC

**PAUL STEINBERG**

Senior Vice President and  
Chief Technology Officer  
Motorola Solutions

**ROGER INGOLD**

Managing Director for  
Brazil and the Latin  
America Geography  
Accenture

**TOM MAHER**

Vice President  
Global Service Parts  
Dell

## DHL Speakers & Panelists

**KEN ALLEN**

CEO – DHL Express

**SCOTT ALLISON – Moderator**

SVP Technology Americas – DHL CSI

**RAJEEV SINGH-MOLARES**

CEO EMEA – DHL Global Forwarding

**LUIS ERANA**

President Technology & SL Americas – DHL Supply Chain

**DAVID WILSON**

EV Sales Global and Europe – DHL Express

**JAN-THIDO KARLSHAUS**

Global Technology Sector Lead – DHL Supply Chain

# CUSTOMER FEEDBACK

## Impressions and looking to the Future



99% OF ALL ATTENDEES WERE HAPPY WITH THE OVERALL EVENT, ORGANIZATION AND THEME

*"Well organized, exciting technology sharing; Good platform to exchange ideas, thoughts."*

Xiabo Li, Huawei

*"The quality and content of the outside speaker presentations were truly outstanding. I would ask that this same level of thought provoking content be continued in the future."*

Frederick Hartung, Jabil



100% WOULD RECOMMEND THE CONFERENCE TO THEIR PEERS

97% OF ALL ATTENDEES WERE HAPPY WITH THE NETWORKING OPPORTUNITY, EVENING EVENTS AND HOTEL

*"Great event, great plenary sessions. I like the fact that it was not a DHL "sales" event, but a true event where High Tech Leaders can share best practices and interact on a "neutral" arena."*

Horacio Chavez, Lenovo

*"I have been to all conferences over the past 4 years and find them valuable. It's positive to have interaction with my suppliers, customers and competitors"*

Carson Cato, Commscope

THANK YOU AND SEE YOU IN 2015



Rob Siegers, DHL

It was a pleasure to meet many of you at our 2014 Global Technology Conference in San Diego. I would like to sincerely thank all the people who have contributed to the success of the meeting – especially the many customers who have actively shared their experiences and best practices with the attendees.

The positive feedback we received encourages us to continue with our focus approach for the technology industry. After Frankfurt in 2011, Berlin in 2012, Shanghai in 2013 and San Diego in 2014, we plan to move the 5th Global Technology Conference to the EMEA region in 2015.

I hope you will be able to join us. Invitations to the event will be sent out this autumn. Until then, please join the discussions at our Technology LinkedIn Group:

→ <http://www.linkedin.com/>