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Why and how do national monopolies go global? International competition, supranational regionalism and the transnational reorganization of postal and logistics companies in Europe

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discussion paper

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Why and How Do National Monopolies Go „Global“?

International Competition, Supranational
Regionalism and the Transnational Reorganization
of Postal and Logistics Companies in Europe

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Abstract

The paper documents and analyses the rise of a transnational transport and logistics' industry within the European Union. Neither a global commodity chain, nor a national business system approach is considered adequate to help comprehend trans border reorganization within the European Union signalling a need for an approach to organization research able to tackle transnational institutionalization processes. To illustrate the extent to which transformation and „denationalization“ of traditional transport industries has proceeded in the 1990s, the paper starts with an account of the very recent ascent of the largest European diversified logistics service company: the German Post office (now Deutsche Post AG). The rapid conversion of the public postal system (by way of aggressive M&A activity mainly) into a *transmodal, transnational, and information technology intensive* private organization able to supply a wide range of both uniform and highly specialized services across borders is used to introduce the argument on: a) the overall transformation of national European transport systems and on b) new structures of competition and cooperation with regard to an emerging transnational production related service branch.

Zusammenfassung

Der Beitrag dokumentiert und analysiert die Entstehung einer transnationalen Transport- und Logistikindustrie in der Europäischen Union. Weder der „global commodity chain“-Ansatz, noch der „national business system“-Ansatz werden als hinreichend erachtet, grenzüberschreitende Reorganisationsprozesse innerhalb der Europäischen Union zu bearbeiten. Damit wird auf die Notwendigkeit verwiesen, einen organisationssoziologischen Ansatz zu entwickeln, der transnationale Institutionalierungsprozesse erfassen kann. Um die Reichweite der Transformations- und De-Nationalisierungsprozesse zu illustrieren, vermittelt das Papier einen Überblick über die jüngste Entwicklung des größten diversifizierten europäischen Logistikdienstleistungsunternehmens: die Deutsche Post AG. Die Analyse des rapiden Umbaus der öffentlichen Postverwaltung (vorwiegend durch aggressive Übernahme- und Fusionsaktivitäten) in eine transmodale, transnationale und informationstechnologieintensive privatwirtschaftliche Organisation, welche eine breite Palette von einheitlichen und hochspezialisierten Dienstleistungen grenzüberschreitend anbieten kann, wird aus zwei Gründen vorgenommen: zum einen zur Darstellung der generellen Transformation der nationalen europäischen Gütertransportsysteme und zum anderen zur Erfassung der neuen Strukturen von Wettbewerb und Kooperation in einer im Entstehungsprozess befindlichen, transnationalen produktionsbezogenen Dienstleistungsbranche.

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1. Transnational problem solving: How to make sense of the new post office?

Some things never change. Only 10 years ago, almost every observer would have agreed that the German business system in general and the organization of the German post office and railway in particular are such „things“. Once it was a common saying in Germany that you could regulate a watch according to the German railroads. Even Russian revolutionary Lenin was so impressed by the German post office back in 1917 that he seriously suggested organizing the whole of the „*Volkswirtschaft*“ (the *national* economy) following this model (Lenin 1929, 50).

Colloquial German refers to a social relation (e.g., a friendship) as an institution if it seems to have always been around and will be around forever. Scientific use of the term is quite similar as institutions are believed to be reliable, solid, and stabilizing factors in societies. They are not explainable by voluntarism and if they are considered historical phenomena, they are thought to change only slowly and within certain parameters, if at all (March/Olsen 1989, Kristensen 1996).

Why then do at least some „institutions“, or institutional arrangements including parts of state apparatuses break up or fall apart or undergo radical change sometimes rather quickly? Consider the case of the German post office or other major European postal operators which used to be *strictly national* state departments firmly entrenched in the wider organizational and institutional framework of the respective *national* business systems since the middle of the 19th century.¹

Starting back in 1997, Deutsche Post AG went on an extremely rapid expansion both at home and abroad. A \$3.1 bn spending spree brought over 20 companies across Europe, the U.S. and elsewhere with some 100.000 employees under influence or control of a state organization soon to be privatized.

¹ Before nationalization of the postal organization, the Thurn und Taxis empire was an operating system across Europe since Habsburg emperor Maximilian I. accredited the rights to conduct this business to the noble family (originally from Italy) in 1516. Only after railway and telegraph development, the invention of a uniform (low) pricing system for mail by Rowland Hills in the UK in the 1830s, the founding of the German-Austrian postal union in 1850 and the world postal union in 1874, the modern national form of the postal system took shape (Geistbeck 1986 [1895], 360f.). Compare Ruggie (1993) on state and territoriality before the rise of the nation state.

The most important acquisitions included 25 percent of the international integrator DHL (courier and express services) and 97.4 percent of Danzas AG (the leading European logistics business from Switzerland). Table I provides for a more detailed overview on.

Table I: Recent Takeovers by Deutsche Post AG

Company	Country	shares (%)	Price (Mln)	Employees	Turnover
AIR EXPRESS INTL.	US	100	DEM 2.100	7.700	USD 1,52 Bln
DHL	US	25		55.000	USD 4,5 Bln
Securicor Distribution	UK	50	DEM 620	12.500	
Danzas	Switz.	97,4	EUR 939	16.000	EUR 4,4 Bln
Postbank	Germany	100		13.330	
Trans-o-flex	Germany	24,8		2.200	DEM 695 Mln
Trans-o-flex	Germany	50,4		3.200	> DEM 1 Bln (Europe)
Ducros Services	France	68		2.200	DEM 366 Mln
MIT	Italy	90		1.000	DEM 176 Mln
McPaper	Germany	100		885	
Global Mail	US	100		300	USD 43 Mln
IPP	Austria			78	
GP Paketlogistik	Switz.	„a majority“			
Belgian Parcel	Belgium	100		49	
Merkur GmbH &Co	Germany	51		290	
Servisco	Poland	60		958	
ITG Int'l Spedition	Germany	80		575	DEM 150 Mln
Qualipac AG	Switz.	100			SF 21 Mln
Meadowsfreight	Ireland	100		240	EUR 50 Mln
Nedlloyd (EU Transport)	Neth.	100	DEM 1.043	~ 11500	EUR 1,45 Mrd
ASG AB	Sweden	52,4		5.700	DEM 2,8 Bln
Yellow Stone	US	100			
Siemens Printery	Germany			200	
Netlog	Germany	100		105	
Guipuzcoana	Spain	49		1.700	EUR 186 Mln.

Source: FT 26.5.1999, 3, DPG: HV-Information #66/98, DVZ 10.7.99, 2, 21.8.1999, 1, HB 16.11.1999, 13.

Will the state owned company Deutsche Post AG remain akin to the historical „German institution“ after digesting radical m&a activities, accompanying restructuring, and privatization scheduled for autumn 2000? Will the companies acquired remain the „Swiss“ or „Dutch“ domestic organizations they used to be? How can the far reaching reorganization strategies of state bureaucracies and Post offices such as Deutsche Post be explained?

In this paper I will offer an explanation of the reorganization of postal organizations as a part of an overall transformation of transport and logistics mar-

kets of which postal markets become an integrated part, their regulatory regimes as well as demand and supply firms and associations active in this business area. My central message can be simply stated: recent capitalist development gave rise to privately owned *transnational intermediary and problem solving firms* in the field of transport and logistics that have absorbed and/or replaced „infrastructure companies“ controlled by the nation state. Reorganized postal companies as well as other major transport businesses exhibit both universalistic and specialist features which result from a) new supply and demand strategies of business groups and b) from new transnational development opportunities opened up by way of commercial, technological and political strategies that realigned both private and state actors in new polities.

This finding challenges both globalist structural (e.g. global commodity chain) and (national) institutionalist explanations of organizational (and societal) development, in particular, their lack of consideration of transnational institutionalization processes. It is of central importance to understand how both internal and external liberalization efforts and implications of neoliberal restructuring transcend the dichotomy between national and not national spheres (section II). During the nation state centred period of development before the 1980s, state-owned or state-regulated firms and their coordination were accurately explained within a national institutional framework since there was no immediately important dimension beyond the nation state framework of relevance to the political constitution of inland markets, and outside power relations could be considered as such (influence of international contracts or outright domination) (section III).

In section four I will examine the transformation of the pluri-national transport system. New logistics demand and innovative logistics supply organization interactively started to change the institutional stability in the course of the 1970s, both nationally and internationally. Hitherto obstructed internationalization was unlocked in due course in general transport and even in postal markets. Both commercial and political strategies of the new and increasingly internationally operating transport and logistics' firms started to de- and reconstruct national European (and other) transport and logistics policy regimes and markets in the course of the 1980s and 1990s. Together with major transport customers, business associations expert groups and powerful political allies, the leading logistics groups proved strong enough to create transnational varieties of transport regimes in NAFTA North America and in the European Union enabling new varieties of transnational logistics firms. Summing up, in section five I will briefly reflect on material and theoretical implications of transnational varieties of capitalist organizations.

2. **Multinational companies analysis: problems of aggregation, generalization and blind spots with regard to supra-national institutionalization**

Sociological analysis of the firm in general and of the multinational enterprise in particular has yielded many insights with regard to common features and variations of organizations that may result from national business systems (Whitley/Kristensen 1996) or depend on different types of global commodity chains (Gereffi/Korzeniewicz 1994). While these approaches are certainly highly stylized in the following brief discussion, they do represent opposite poles of a wider research continuum.² While there are important differences with regard to research interests and explanatory concepts used, both approaches are interested in broader societal issues and power structures, a stance that sets them apart from management scholars who rely on insights from micro-economics who focus much more narrowly on isolated companies that do not necessarily have to be real.³

NBS literature emphasizes important institutional structures in societies including e.g. historically developed patterns of political decision making or the organization of education and training. Scholars can show major differences of German companies vis-à-vis British (Lane 1996) or French (Hancké/Casper 1996) due to specific relations between manufacturers and financial intermediaries or manufacturers and suppliers among others. The differing characteristics of labor markets and industrial relations have a strong impact on the organization of „hierarchies“ to use Williamson's (1975) code for the firm. Cultural approaches have found distinctive routines within one (uniform) multinational organization according to the national location of the subsidiaries (Hofstede 1980). With regard to performance, institutionalist approaches emphasize that each national combination contains specific „competitive advantages and implicitly or explicitly warn against attempts to break up the congruence of national institutional relations“ (Soskice 1997, Heritier 1995). These authors suggest that there simply is not one way to „best practice“ and „best practice“ itself needs to be defined.

The business system approach, however, may run into troubles explaining similarities of companies from different national business systems that may depend on factors such as sectoral and/or technological features of a certain

² An interesting exchange on the different focus of NBS and GCC literature and the question of complementarity has been published in *Competition and Change*. See Gereffi (1996) and Whitley (1996).

³ A typical example for strategic management literature is Bartlett's and Ghoshal's (1989) distinction of international, global, and transnational strategies to identify a „best practice“ called transnational solution without discussing larger societal and political relations firms form a part of.

type of business or on the ability of a company to impose a strong corporate culture on a „national“ culture even if some modifications may have to be conceded (Royle 1997). The approaches also display little sensitivity with regard to diverse and contradictory characteristics within one system and with regard to (radical) change over time. To limit one's view to the high wage/high productivity bargain in Germany ignores the existing (and expanding) low productivity/low wage sector in this economy and drastic differences even within the industry sector. To distinguish volatile British or U.S. capital markets supporting risk capital and rather stable relations in German corporate finance penalising venture capital may underestimate recent adaptations in the German system (Wirtschaftswoche: 3.9.1998, 50).

In general, many articles written to support the „national variety“ argument struggle with the fact that intensified pressures to change traditional ways quite obviously do exist considering the last 20 years or so. If one argues about such change according to the old metaphor of the „glass still being half full“ (like much of the comparative literature on institutional embeddedness), it can also quite convincingly be argued that it is already „half empty“ (which is not any more persuasive either, of course). There can be no doubt that one has to leave or to adjust an epistemological framework if it becomes too narrow to tackle new and/or important phenomenon.⁴

Even the most strident defense of nation state importance to large enterprise produces contradictory empirical information and force authors such as Hirst/Thompson (1996, 83) to state that only „supranational regionalism“ can be supported by empirical evidence. The comprehensive analysis of multinational corporations by Ruigrok/van Tulder (1995) nevertheless eschews a political and economic perspective of transnational integration by way of linking international reorganization and control strategies of companies completely back to (home) nationally based bargaining relations within industrial complexes. A national network (including suppliers, trade unions, financial institutions etc.) around a core company by and large—and with overriding impact on other social forces and factors—is considered to frame the organizational pattern of the multinational organization. Dörre (1996, 1997) criticizes Ruigrok/van Tulder's primary focus on focal companies, (too) narrow rationality assumptions and the lack of examination of other power resources in the analysis. According to them, companies using (or threatening) the exit option gain leverage to experiment with differing bargaining and control concepts. Such moves can imply new ways of organizational learning and may lead to hybrid control types which destabilize the coherence of a specific path of internationalization of a core company and thence of an industrial complex. At the current stage of development it appears as an open question subject to empirical clarification whether

⁴ Michel Aglietta (1998, 55) correctly argues that many accounts based on Polanyi's approach of embeddedness focus on the destruction of old institutions while ignoring the construction of new ones.

or not the argument of *strictly* national path dependency of industrial reorganization is *still* valid.⁵ According to Dörre et al., not only the core company but the other participants in the industrial complex have the opportunity to learn in the course of internationalization processes which may, for example, yield societal re-regulation perspectives beyond the nation state. In any case, globalization as an option of companies transforms social relations even without actually „globalizing“.⁶

One can leave the epistemological framework of national institutionalism according to my view without giving up major insights by way of „bringing capitalism back in“. If absolute autonomy of the state vis-à-vis economic interests can be demonstrated (see Evans/Skocpol/Rueschemeyer 1985), it is by way of more or less elegantly pushing aside explanatory variables of societal development outside the (state) institutional sphere (Pontusson 1995). Structural economic circumstances and „independent“ action of business groups (representing social and power relations in their own right) have to be reconsidered in relation to state and institutional variables if substantial change in state related infrastructure sectors such as privatization, deregulation, and internationalization is to be better understood. Without a fresh comparative political economy approach, there is little to learn both with regard to public policy and organization in this subject area. We need to take structure and action of human made social relations seriously yet due to historically specific circumstances have to consider spheres of such structure and action outside the national theatres since institutionalization processes stretch beyond traditional „containers“.⁷

⁵ For a first empirical test see Dörrenbächer (1999). This examination of the top 10 telecom equipment manufacturers in the world showed strongly path dependent style and procedural aspects of globalization while the sample displayed a more or less universal market orientation.

⁶ This finding has been verified with regard to the impact of „globalization“ on the German collective bargaining system, see Bispinck/Schulten (1998).

⁷ Neogramscian approaches to international political economy (Cox 1983, compare Bieling/Deppe 1996) have been used to tackle tensions between and recent transformations of private and public power relations. Schmitter's (1996) sectoral approach identifies sector specific governance mechanisms across borders without arguing the obliteration of national distinctiveness (compare also Castells 1996, 168f.). In Schmitter's view, specific market structures, business associations, and organizational relations, however, complement the perspective of nationally contained developments. Schmitter (1997) explicitly pays attention to the issue of European integration creating a distinctive though incomplete polity. His analysis of the „emerging Euro-polity“, however, did not have a strong influence on the editors of a comparative book concluding that rather vague spatial and institutional nestedness beyond national borders challenges the importance of authoritative national embeddedness (Boyer/Hollingsworth 1997).

Global Commodity Chain literature on the other hand focuses explicitly on organizational relations beyond political boundaries. Work done along this line has yielded important insights with regard to substantial changes of the international political economy. The research interest focuses on the historical evolution of the configuration of businesses along different steps of production to investigate more closely patterns of labor division. Commodity chain approaches are not based on institutional/societal assumptions about firms. They are not interested first hand in cross country variations and exhibit a stronger economic structuralism. Most commodity chains under scrutiny are geographically not narrowly confined. The perspective then focuses on regional economies if not the global economy. The GCC approach was developed on the back of Wallerstein's world system theory and shares its interest in broad structures of power division along value chains and territorial regions of the world economy (Gereffi/Korzeniewicz 1994, Henderson 1996).

A major distinction between producer and consumer driven commodity chains has been proposed to study distinctive types of asymmetrical power relations between firms along various stages production processes and their consequences for the distribution of added value. The strength of such a clear cut dichotomy may also cause major difficulties. It is not so clear whether the sharp distinction between producer and customer (better trader) driven chains holds in many instances. E.g., the „buyer-driven“ apparel commodity chain (Gereffi 1994) includes producers of textiles that share characteristics of producer driven chains. More generally spoken, it is complicated to focus on production or marketing as a single or main characteristic of large corporations which may integrate a wide variety of business activities and competencies. However, the introduction of a „third chain“ of service providers claimed to be significantly different from the producer and consumer driven networks (Frenkel/Royal 1997) seems not to add much to a better understanding of the way commodity chains work. While it is important to raise awareness about the role of much neglected services along supply chains, production related service work needs to be considered as a part of commodity chains rather than as a separate „knowledge intensive“ network.

Much like Wallerstein's World System Theory the GCC approach is by and large ignorant to the historically national constitution of the international system of capitalism. The (over-) emphasis of state/institution centred analysis in the case of business system approaches meets here an (over-) emphasis of private economic power relations. If with regard to different types of industrial production and trade a lot of work may be done without to much explicit consideration of political powers, analysis of state related sectors needs immediate attention to the political constitution of market transactions.

The frameworks of both the business system and the commodity chain approaches are in principle open to transnational modes of accumulation and

regulation to use a modified framework of the French regulation school originally based on Aglietta's (1979) work (see Whitley 1996, Gereffi 1996). There is, however, too much rigidity in both accounts. Global economic structuralism reduces political regulation to a footnote in the case of much of commodity chain analysis whereas institutional structuralism mostly externalizes transformations of economic and political relations outside national frameworks. Both the NBS and GCC approach are hitherto silent with regard to theorizing multi-level polities such as the European Union and organizational implications thereof. Theorizing the state beyond its historically national form, however, is indispensable to make sense of the recent transformation of infrastructure related service sectors.

Transnational integration and organization should not be confused with „convergence“. Old and new uneven development, national, and regional variation etc., however, do not prevent capitalist relations from expanding transnationally thereby integrating economic and political organizations, processes and institutional structures in specific ways. Eastern enlargement of the EU, for example, will bring some transformation economies into a rather specific set of institutionalized rules that may be less strong than national institutional legacies but that are clearly much stronger than the anarchy claimed to dominate the system of international relations in the perspective of (neo-) realist thought. Recent history seems to provide ample support to a new round of specific deepening of integration on capitalist terms going along with disturbing amounts of disintegration and social exclusion. In support and part of integration, new business infrastructures are established to include and connect participating territories and businesses while other regions and/or organizations are left outside of „value adding“ zones and chains.

Although such selective deepening of integration is not a priori confined to any particular area of the world, there are major differences in the inter- and transnational relations of what used to be more strictly national economies and social geographies. Politics of Production (Burawoy 1985) have created different transnationalized institutional regimes in North America, Europe and in other regions (Gamble/Payne 1996) as opposed to national systems embedded in traditional international regimes (Krasner 1983).

Unlike the wider and weaker frameworks and institutional rules governing the multilateral WTO system, supranational and regionalized social economies, in addition to and sometimes instead of the nation states, give rise to the (thence in many regards transnational) „formation of firms and social groups“ (Kristensen 1996). Varieties of transnational capitalism may in turn provide for varieties of transnational organizations and vice versa. In any case, the organizations themselves and their relations in particular with regard to institutionalization processes beyond the national governance regimes need to be

examined more closely to understand organizational changes that both *enable and transform* (national) business systems these days.⁸

The category „transnational organization“ thereby seems to offer a two sided advantage over the two frameworks discussed: Transnational varieties of organizations can be examined on the base of much work done to unravel national societal effects on firms and yet take into account more systematically other factors of influence in particular related to economic competition and supranational institutionalization. Organizational relations examined by commodity chain literature may also be reconsidered in light of transnational variations related to changes in supranational polities. A closer analysis of production related services may improve understanding of some twists between organizations along supply chains and may help to explain future power shifts likely to strip poorer and weaker countries from some of their resources by way of commodifying state related sectors. This argument shall be made using the changing world of transport, logistics, and postal markets as a case study.

3. „Strictly national“ organizations

Unlike many notions of transport being a „global industry“ per se, transport like many other business areas close to state/infrastructure activities have been rigidly nationalized in the course of nation state development. Crossing borders (airlines, trucks, sometimes rail and inland water shipping) or operating between territories (ocean shipping) does certainly not make an industry „global“ if internal and external conditions of organizations and operations are entirely dependent on national and international rules.⁹

Outside the United States, almost all of the important transport organizations were state owned during most of 20th century history. The U.S. system of

⁸ Gramsci already conceived of the need to examine the expansion of private interests across the national states. He focused international relations outside the state polity and argues they can lead to „original and historically concrete combinations“ (Gramsci 1991, 1561, Heft 13, §17). Gramsci emphasizes in this context (as in many other places) the role of Free Masonry and the Rotary Club which belong to his category of intellectuals. (1562). Today’s new associations and expert groups in the field of logistics (see below) are quite important in this regard.

⁹ If those rules are ignored, airplanes may be gunned down in peace time as happened to a U.S. plane intercepted by Russian armed forces in the course of the 1980s. Those observers of the transport industries who claim that transport, and most „naturally“ ocean and air transport, are „global“ industries support a pure territorial/market line of thinking, consciously or unconsciously (Kasper 1988, Ronit 1995). If this understanding is shared, the satellite industry would probably figure as a „business of outer space“.

private transport industries (railways, airlines, trucking, etc.) supervised and regulated intensively by („independent“) agencies and commissions (like the Interstate Commerce Commission or the Civil Aeronautics board) can be interpreted as a functional equivalent to direct state ownership. The U.S. postal office, of course, continues to be one of the largest state owned companies in the world.

But not ownership alone matters with regard to the category of a strictly national business. With the nation state ascribing many political goals to transport systems, operations even within most if not all national transport markets were severely restricted. Outright legal provisions, as well as market entry and exit control by way of licensing and price regulation gave state administrators and/or trade associations (of transport users and suppliers) an important say with regard to private contracting. The national business systems - despite many differences - were quite similar for a long time with regard to certain features of (state) monopolies (rail, telecommunication, airlines) and small and medium enterprises preserved by market regulations (trucking). This is not to say that strong national varieties (e.g. UPS as a quasi postal company operating next to the U. S. state postal system compared to monopolies of national state apparatuses in Europe's postal system) do not need to be explained and do not have explanatory power with regard to specific features of internationalization. The more important aspect at this point is the historical thwarting *of transnationalized organizations and the peculiarities of trans-border operations, the specific way of interaction between national and not national spheres until the most recent period of transport industry development.*

Even if foreign companies managed to obtain a license to operate in another market (say as a freight forwarder), many restrictions with regard to capital ownership and the (foreign) workforce applied. Trucking subsidiaries of the same company, for example, would not be allowed to run single line operations. The companies run by one owner had to rely on inter-line operations. The legal separation within the company subdued economic integration of ownership. Strategies of companies under these circumstances necessarily had to be „multi-domestic“ or „polycentric“ (Perlmutter 1969) until the 1980s.

The specific (multinational) organization of trans-border („global“) traffic did not prevent internationalization as evidenced by the post WW II history. The multilateral transport regimes rather enabled the largest expansion of international exchange in history. Under the terms of the old transport system, a postal company much like other transport companies was allowed to deliver mail (or other freight) to another country, but only to one specific point where a „national“ company had to take over. There was no legal way to do business within the foreign country *as a foreign* company and many restrictions guaranteed a specific division of labor between national and foreign transport firms as

regulatory constraints placed specific restrictions on the division of labor between transport users and suppliers.

I do not want to engage in a discussion of the rationale of state ownership and/or state intervention into transport markets and regulation of transport organizations which are discussed at great length e.g. in contributions to welfare economics disputed by market radical economists and others.¹⁰ Arguments of economists about „natural monopolies“ (in railways), „ruinous competition“ (in trucking), „external effects“ and the like only replaced outright political arguments of previous times to use transport operations for specific purposes (military, industrial, regional development etc.) at a certain point of time in the history of capitalist and nation state development.¹¹ According to German transport scholar Fritz Voigt transport has to fulfill three basic functions in human affairs¹²:

It is firstly, a service to meet consumption needs, secondly, a necessary part of every division of labor and of every market and it is, thirdly, an important sphere with regard to the *integration of the state and society* (Voigt 1973, 7-13, emphasis added). The second and the third functions obviously are at the core of current tensions between patterns of intensified labor division regarding territorial and juridical boundaries as artificial and superfluous barriers (the market radical perspective) and the ongoing need for social, political, and economic cohesion at regional, national, and increasingly, supranational levels.¹³

¹⁰ On the history of transport regulation in North America see Plehwe (1997b), on Germany Voigt (1973).

¹¹ See Scherrer (1987) for a discussion of regulatory theory, Alfred Kahn (1970/71), president Carter's chief inflation fighter and deregulation expert, provided an excellent overview of regulatory questions and the reflection of a new rationality of regulatory politics. On Kahn's role in the regulatory reform era see McCraw (1984).

¹² This understanding is in stark contrast to more recent views of transport as just another market. In fact, Voigt was writing before the market radical flow of idea including the reinterpretation of this sector was organized in the 1970s. An excellent history of the rise of neoliberal market radicalism has been written by Cockett (1995). Unlike many other contributions to the „role of ideas“, Cockett links the history of the Mont Pèlerin Society founded in 1948 by Hayek, Friedman and others to the rise of think tanks and other channels of „second hand dealers in ideas“. The role transnational discourse coalitions to bring about neoliberal hegemony is examined in Plehwe/Walpen (1999), on transport in particular see Plehwe (1997b).

¹³ There is no way to base market radicalism in transport on Adam Smith as many neoliberal arguments try to suggest. Smith certainly was well aware of legal, and power barriers to transport and trade. He underlined the stimulus provided by inland water transport for the development of economies of scale, intensified trade and thence the opportunities of labor division. He was well aware of the fact that the advantages of natural trading channels like inland shipping routes fully accrue to territories governed by one (state) power only. In his famous book „The Wealth of

For the purpose of the argument of this paper it is enough to point out that a „transnational“ or „global“ transport market did not exist since national statehood enforced the principle of national sovereignty strictly and extended it to ocean and air space. Before the 1980s and well into the 1990s the transport industry thus belonged to the group of industries characterized by „blocked internationalization“ (Rall 1986).

The strictly confined national system furthermore was internally made up by many *segmented* markets. Segmentation in European national states as well as in the Americas included the separation of modal markets (rail, air, road, water, pipeline), regional (geographic) markets (licenses for local and long distance transport), certain product markets (most obviously the postal market), and last not least the differentiation between commercial suppliers and the transport operations of industrial and trading companies which accounted for up to half of the market in most countries.¹⁴ Each market's institutional and industrial structure had a strong impact on the organizations operating there. The dominant organizing principle was a modal organization within a national and otherwise segmented framework and specific organizations (import/export brokers, forwarders) being in charge to smooth the trans-border flow of exchange. Relations between transport organizations were thus stabilized as were relations between customers and suppliers.

Nations“ (1973, 39) he mentions the Danube traffic as a negative example because Bavaria, Austria and Hungary all had jurisdictions over parts of that river. Not only does the state matter in the thinking of Smith. Robert Reich, the former U.S. secretary of labor reminds us of Adam Smith's conviction about the use of traditional transport regulation by the nation state: „Nor did Adam Smith object in principle to government intervention when the nation's interest required it. He opined that the Navigation Acts (trade with the colonies was only permitted if British flag ships were used for the transport, D.P.) were 'perhaps the wisest of all commercial regulations of England' because „defense is much more important than opulence“, and that Britain should expand its empire by seizing islands from 'the Falklands to the Philippines'...“ (quoted in Reich 1992, 19) The British Empire in fact introduced the protectionist regime substituting a liberal ocean shipping order enforced by the Dutch before. Only in the late 19th Century, a liberal regime was reestablished by the now predominant British Empire until World War I – the overwhelming market power of British shipping lines did not need the extra protection any more to shield its hegemonic status (Cafruny 1987).

¹⁴ Counting not only transport but reshipment and warehousing as well as extended logistics services the European market is worth about DEM 900 billion. Less than 50 percent of this total is supplied commercially. (Klaus 1999). Own account transport was subjected to intensive regulation due to the fact that shippers could not offer own account services to others resulting in inefficient use of equipment („dead heading“ is the interesting phrase used to describe trucks running empty and thus highlighting the valorization process).

Since historically transport users (industrial and trading companies) and transport suppliers were rather opposite forces with strong inclinations to reach secure power positions, the state increasingly started mediating between the two or took transport business over. Thus state institutions helped tip the power balance far toward the supply side of the business benefiting private providers and smaller customers. Neither could large private transport suppliers dictate prices (uncontrolled monopoly) nor could large transport users wring extraordinary concessions (monopsony power).¹⁵ The nation state constituted a twofold barrier against extended private capital accumulation in the field of transport/logistics: firstly, through state ownership and secondly, by legal/geographic market regulations which restricted private organizations.

The national transport systems within the international transport system thus were an important institutionalized structure within an overall international arrangement that Ruggie (1982) called „embedded liberalism“. International transport in any case constituted special market segments which were all (and continue) to be governed by sectoral/modal *international regimes*¹⁶ (Krasner 1983).

Susan Strange examined international transport regimes as secondary power structures in the world system and shows that the regimes established under U.S. hegemony have some explanatory power with regard to organizational development. Established regimes favored national companies in virtually every country in the case of airlines (railroad, trucking etc.) and more or less prevented such nation state based equality in ownership in the case of ocean shipping (Strange 1988). It is quite amusing then to read market a

¹⁵ Much of the modern anti-trust law emerged in response to attempts of business groups to monopolize means of transport, e.g. Rockefeller's and Morgan's attempts to control rail and other infrastructure industries. More generally, Hilferding described the role transport played with regard to monopolistic competition. Nationalization weakened monopoly power and slowed retarded concentration processes (Hilferding 1968, S. 274).

¹⁶ The *World Postal Union* was founded in 1874 and spelled out the rules of international postal transport (Geistbeck 1986). Air traffic is conducted under the regulations of the international transport law based on the Paris convention of 1919 which extended national sovereignty to the air space. After WW II both the *International Air Transport Association* (IATA) made up by the private and/or state owned organizations and the *International Civil Aviation Organization* (ICAO) provided the overall regulatory framework (Doganis 1991). To regulate international ocean shipping, in 1956 the *International Maritime Organization* (IMO) was founded. Two predecessors, the *International Shipping Federation* and the *International Chamber of Shipping*, had failed to provide for the necessary framework (Farthing 1993). A convention for multimodal transport services has been drafted and frameworks for other transport services are considered as topics of the GATT-Services negotiations. Progress, however, has been very slow to develop the „global“ multilateral framework under the accepted principles of the World Trade Organization (WTO 1989, 1998a-d).

radical scholar (Kasper 1988) writing about the „global“ airline industry suggesting that the U.S. should not adhere to the most favored nation principle of GATT in the case of airlines and rather use its leverage in bilateral agreements to achieve maximum liberalization of the foreign market (see Doganis 1993 on various future perspectives of international aviation regimes).

Transport industries thus are „global“ only in the sense that international transport operations provide for channels and mediate the exchange within the multinational trading system. How these channels are organized deserves more attention due to rapid and significant change in the governance of transport and logistics organization. Intensified competition and reorganization blurred the lines between modal transport regimes, between the primary power structure of the production system and the secondary power structure of the transport system, and between national transport systems. The question is why such change occurred and how change came about.

4. The discovery of the distribution function and the rise of transnational transport/logistics supply

Within this highly segmented and pluri-national framework, some innovative transport companies started to expand strongly within national and into foreign markets since the late 1970s.¹⁷ The new organizations that originally challenged and later were among the crucial change agents in the transport and logistics world were of U.S. (FedEx, DHL, UPS) and Australian (TNT) origin. Federal Express and DHL, in particular, were the two companies first able to deliver added value to production chains by way of reducing circulation cost. To understand why such innovation was introduced, we have to ascertain the discovery of the distribution (later: logistics¹⁸) function which occurred around

¹⁷ Certainly there have been multinationals in transport before liberalization created new opportunities: The Schenker organization (privatized since the late 1980s) counted more than hundred firms abroad already before WW II and as subsidiary of the German railway had more offices abroad after WW II than the German diplomatic service. On the history of the company originally inventing „less than truckload“ (rail wagon load originally) services see Matis (1995) and Plehwe (1994). However, the activities of transport (in the case of Schenker freight forwarder) capital were narrowly circumscribed and since market entry was by and large under state control it was difficult to expand operations abroad.

¹⁸ Only since the 1950s an economic understanding developed in addition to the military use of the word. (Bjeljic 1987) Logistics in its modern economic sense means that goods have to be at the right place at the right time in the quantity and quality needed. Logistics management is thus concerned with organizational and operational tasks regarding aspects of time and space of the production (value creating) process. Central to logistics are transport, reshipment, and warehousing and connected

the advanced industrialized world to be written down in the United States of the late 1960s.

4.1 Strong visions back in the 1960s: The discovery of the logistics function

During the decade of the 1960s a significant change began to occur in management attitude towards the role and importance of the distribution function of the business firm. This change was not confined by international boundaries or concentrated in any narrow segment of industry type. During this period a new literature of management philosophy emerged, encouraged by vigorous support from trade associations, the trade press, government, and the academic community.

La Londe/Grabner/Robeson (1993 [1970], 4)

Logistics can be defined as a concept to guide economic *processes* (both at the micro and macro level of the economic system) and as a tool of rationalization to optimize specific areas of the labor process focusing initially on transport, reshipment and warehousing, and including cost reduction for such services (Danckwerts et al. 1991, 39).

The first issue of the U.S. *International Journal of Physical Distribution* (1970) contained a prophetic article by La Londe, Grabner, and Robeson on coming changes of the distribution function in management (reprinted 23 years later in the renamed *International Journal of Physical Distribution & Logistics Management* 1993). It carried a description of the integration of the logistic functions as a single management task within the company in order to streamline and rationalize fragmented processes of material flow. The 1960s were described as the decade of marketing while the 1970s were to become the decade of distribution management due to new competitive constraints. The renewal of scientific management efforts, the impact of new technologies in data processing, the importance of distribution to increase consumer satisfaction and the prospective impact of cost reduction in distribution on overall profitability were all factors cited to raise the importance of distribution management.

Although the share of distribution costs in total costs was as high as 45 percent in some product markets, it was not yet targeted then as a business area to be rationalized at large while. „It would seem, therefore, that the new focus upon efficiency in distribution was a logical outgrowth of the American business environment. That is, one of the last remaining frontiers for significant

information, communications and control processes. Functionally micro economists distinguish between supply, production, distribution and recycling logistics (Danckwerts 1991).

cost savings in the business firm was the distribution area¹⁹ (La Londe/Grabner/Robeson 1993, 7).

The increasing impact of logistic costs on profitability was directly linked to increasing international competition in 1970 (La Londe/Grabner/Robeson 1993, 7). Intensified rivalry was reinforced by the relative decline of economic hegemony of the United States vis-à-vis Japan and Europe and the unfolding „crisis of fordism“ (Aglietta 1979). The structural profit squeeze of the time may in fact explain why the time was ripe for the final discovery of logistics as a tool of rationalization.

Separation of the distribution function in the early days of logistics thinking would allow companies to better adapt to faster and more dynamically changing markets both with regard to product cycles and geographical expansion. Four factors were distinguished with determining influence on the development of the distribution function: Increasing acceptance of a *systemic* distribution approach, increasing weight of the demand side (buyers market), challenges coming from *multinational distribution* and *increasing state influence* on distribution policy and practice (La Londe/Grabner/Robeson 1993, 9, italics added).

By 1980 most internationally operating companies would *separate and integrate* the logistics function **within** the organization according to La Londe et al. Increasing „consumer“ (customer) importance would result from rising use of electronic data processing of trading companies, from concentration of economic power in horizontal and vertical marketing structures, and from attempts of trading companies to push back warehousing costs to producers. This long standing contest between industrial and trading companies could certainly be traced back to the old days of capitalism and is winning increasing momentum in the 1990s with large trading companies trying to force industrial producers to abandon their own logistics operations²⁰ (Bretzke 1999, Hector 1998, Plehwe et al. 1998, 30/31).

¹⁹ The „last frontier“ was already recognized in 1962 by Peter Drucker who referred to distribution as the „dark continent“. And eight years even before Drucker, Paul Converse hinted academicians and practitioners to better address the physical distribution side of marketing. James R. Stock summarized this history of thought (and practice) indicating continuing difficulties to perceive the whole of the logistics chain (not just distribution) and the strategic aspect of logistics. According to Stock only outsiders to the logistics field such as Michael E. Porter helped to more thoroughly address the logistics function. Stock also emphasizes the need to research the interaction of logistics and other functional areas of the firm (Stock 1990, 3-6).

²⁰ The fight over control over logistics operations between producers and traders is thus another example of changing power relations between organizations along the value chain (historically, after the era of merchant capitalism power centered on the industrial end producer as focal company). Toyotist „lean production“ reorganization of course intensified

Multinational challenges were suggested to be of increasing importance to U.S. companies in the 1970s because the share of international sales was considered too low with five percent of GDP in the U.S. compared to 30 to 40 percent in Europe. Because of high levels of trade, companies in Europe (including several U.S. owned firms of course), therefore, were much more experienced with international distribution. Foreign companies from smaller countries already had penetrated the U.S. at the time while U.S. companies strongly relied on their home market. However, U.S. based companies were perceived as being engaged in a drive to rapidly increase international production which would eventually transform the traditional export/import organization. Due to resulting internationalized restructuring of the production and distribution process, distribution managers were set to gain a more central position in the whole organization. LaLonde et. al. add a very interesting remark on supply structures of transport and logistics services:

Parenthetically, it might be interesting to speculate on the role of distribution middlemen in the new international environment. Both the evidence to date and the economic logic would seem to indicate that a **new type of capital intensive conglomerate** will emerge during the 1970s to meet the needs of worldwide distribution. The functions of export packaging, shipment consolidation, ship chartering, export-import documentation, stevedoring, storage, customs requirements, and **multi-modal inland distribution** will be offered **by a single firm**. Thus it is suggested that a new form of distribution middleman with intermodal capability and spanning a wide range of intermediate distribution functions will emerge to serve the needs of the multinational distribution manager during the 1970s (La Londe/Grabner/Robeson 1993, 11, emphasis added).

It is fascinating to see this forecast coming true only taking a little longer overall and involving a myriad of reorganization and deregulation battles (Plehwé 1997a, b). Nevertheless, companies like Federal Express and DHL, hybrid transmodal and technologically advanced logistics providers, started up in the early 1970s. The U.S. Air Cargo Deregulation Act of 1977 was nicknamed FedEx bill because of the support lobby organized by FedEx CEO Fred Smith. (Hamilton 1990) The law allowed new entrants into the previously closed market and was almost unanimously supported by transport users and suppliers, passing without much public debate (unlike air passenger, rail and trucking deregulation). The new regulatory structure thus supported the emergence and rapid expansion of the courier/express industry. Within a few years four companies, FedEx, DHL, TNT from Australia, and UPS came to dominate

traditional hierarchies by creating first, second, and third (and may be more) tiers of supply companies. A new competitive dynamic has recently been addressed under the term „Wintelism“ (Microsoft Windows und Intel) by BRIE authors Borrus and Zysman (1997). Not the traditional end producer, but producers of inputs somewhere along the supply chain occupy a more powerful position. Examples are Intel producing micro processors of computers and Microsoft producing soft ware. Manufacturers in the U.S. electronics business end up with a rather weak position of customized production demanding utmost flexibility to serve a wide variety of customers.

the rapidly growing express market not only in the U.S., but also in the rest of the world.

Traditional suppliers in the field, the postal organizations and the airline/forwarder alliances almost totally lost out to the new (or renewed) players. The original four big players hold approximately 90 percent of the market for international express service²¹, a figure leaving not much room for new entrants which have to be able to match the global hub and spoke infrastructure of the quadruple pact. The new type of company was dubbed „integrator“ because different transport modes have been combined to allow for a through organization from one source. The integrator firms introduced marketing and high tech communication and industrialized automation technology to the transport craft, offered multimodal, speedy, timely, and reliable services (quality) unknown to the industry before.²²

To manage such a through organization *across* borders was quite obviously running against the „strictly national“ obstacles described before. However, as demand for the new (initially illegal) service from important customers (banks, insurance companies etc., see Wojtek 1987) was growing and the organizational capability of suppliers was building up, the existing institutional arrangements were not sacrosanct anymore. In the late 1970s, UPS systematically started to set up shop in Europe. On the initiative of DHL managers, a new business association was founded to challenge and ultimately to fundamentally change the regulatory structures of Europe's transport and postal markets. (Campbell 1994)

The argument of LaLonde et al. in any case suggested correctly that it was becoming far more important for (logistics) management to get involved in the political (re-) organization of the market. New politics in production and substantial reorganization could only be developed by changing the politics of production: The „age of regulatory reform“ (Button/Swann 1989) was coming and „deregulation“ was turned by commercial and political alliances into an international movement (Gayle/Goodrich 1991). This movement was driven both by rising societal and nation state importance to deal with the „external effects“ of capitalist markets and by more aggressive reorganization strategies of business organizations and associations to make markets by e.g. offering and using advanced logistics services, changing ways of co-operation, and creating

²¹ In 1996, 76,3 percent of the international express business was controlled by three companies: DHL (40,7 percent), FedEx (20,5 percent), UPS (15,2 percent). TNT/GD came in fourth place only with 11,8 percent. The tight oligopoly left only 11,9 percent of the market to other companies (DVZ 21.1.1997, 8).

²² A close examination of reorganization patterns of three large German transport groups shows to what extent features of the U.S. companies have been copied (Plehwe 1994).

new structures of competition. The search for new accumulation strategies restored micro economic profitability and enabled new growth patterns (eyeing international markets rather than the restricted home market) of some firms at the expense of others. It succeeded to place internal (national) and in particular external (inter- and increasingly transnational) logistics reorganization very high on the agenda since the late 1970s.

There are numerous accounts focusing on the aspect of intensified national regime competition. Instead of understanding the history of privatization and deregulation as a comparative history of national change, the transnational forces of change and the transnational processes of institutionalization need to come into sight. I want to pick up the story of the post offices in Europe to examine the interplay of strategic reorganization and the transformation of transport regimes.

4.2 Competitive Organizations and supranational institutionalization: Integrators, new post offices, business associations, and: the state!

It has already been mentioned that UPS as well as the other integrators started up abroad in the second half of the 1970s in Europe (Canada was entered in 1974, see TURU 1990, 63f.). During the same period of time, several national competitors to the postal monopolies were developed by trucking and/or forwarding companies in European states, the nuclei of the later (German and then European) networks of small and medium (and subsidiaries of large) parcel enterprises such as Deutscher Paketdienst and German Parcel in Germany. The national firms and the international express companies in turn created a new business force hostile to the postal monopolies. Both outsiders and insiders were soon to combine forces to put the heat on existing regimes. The respective national institutional structures including the post offices as state apparatuses thus came under siege both due to internal and external competition of new or redirected private business enterprises.

Until 1984, the private competitors to national PTTs worked in a grey zone of the postal market as international mail business was reserved for the national monopolies. Most postal authorities and in particular French La Poste undertook considerable efforts to stop the new services administratively (including raids by postal officers with police functions in France etc.). In 1984, however, German authorities decided on the legality of *express* delivery to Germany by outside firms. This legalized an important part of the new supply

offered by the integrators in one country²³ thereby securing the first European bridgehead. The courier/express companies took it from there to other countries and involved supranational EC competition authorities which started to side with the private industry (Campbell 1994). The support from EC competition authorities for the competitors to the national PTTs was all the more important the European officials enjoy executive powers in the field of antitrust.

Increasing private pressures on the old international regime were reinforced by the decision of the Reagan Administration to unilaterally accept the right of couriers to provide international remail services. By taking this decision, the largest originating market of international mail was separated from the established regulatory framework. European (and other) postal authorities in turn started to compete against each other. Despite some postal administrations' eagerness to attract international couriers to their jurisdiction as main point of entry into Europe for bulk remail, several postal authorities organized in the European Postal Union (CEPT) still tried to work out a collective defence strategy setting up EMS International Postal Corporation together with two Postal authorities from countries outside the EU (Canada, Sweden) (Campbell 1994, 139). One way to domesticate globalized market competition thus relates to collective defense against challengers by way of creation of a „strategic alliance“ of national organizations.

On the initiative of DHL, the private courier companies continuously stepped up their collective strategy in the 1980s and 1990s to gain access to protected postal markets. The International Express Carriers Conference (IECC) was originally founded in 1983. Initially a rather loose association depending heavily on DHL's financial support, the big four companies strengthened their efforts in 1987 with TNT and Federal Express matching DHL contributions and UPS becoming a full member in 1988 (Campbell 1994, 125). In 1988, IECC realized the increasing importance of the supranational EU level to influence postal (and other transport) policy. At this time the big four attracted smaller national companies (sometimes separately organized) thus directly binding outsiders and insiders with a common interest together.²⁴ Some IECC members differed, however, on the character of the planned European association. DHL wanted to limit the goals of the European association to traditional express service issues (its almost exclusive market) while the majority

²³ The decision was made with regard to technical questions of postal operations. The regulatory body found Deutsche Post to have no proper authority for a certain type of express business. The legal loophole created a space big enough for the international express companies to come in. (For details see Campbell 1994, 133).

²⁴ In Germany, German private competitors of the Deutsche Bundespost joined the courier/express business association BIEK led by the international firms. In the Netherlands, the two associations, one combining 10 international companies and the other organizing 200 SMEs decided to merge in 1993 (DVZ 14.1.1992).

agreed on a wider agenda (Campbell 1994, 126). In 1989, therefore, two competing European associations operated independently. The Association of European Express Carriers (AEEC) was founded by DHL and others while the other IECC members started the European Express Organisation (EEO). Competing strategies notwithstanding, the two associations fought a common battle against the (multi-) national postal monopoly.

It would be too long for this paper to trace the national and supranational histories of postal reform in the EU in detail (see Plehwe 1997a and König/Benz 1997). After many rounds of heated discussion, green and white book proposals of the European commission to reform the postal market in Europe in the course of the 1990s, considerable national liberalization and European re-regulation has been finally agreed upon on December 18, 1996 by the Council of EU ministers. The current arrangement leaves the postal monopolies with a reserved market for standard mail up to 350 grams and up to certain price levels to cover expenses needed to fulfill universal service obligations. Full liberalization within the European Union is on the horizon (after 2002) with a decision to be taken by the Council in 2000. It has yet to be decided, however, how to finance universal service obligations if the remaining monopoly for regular mail is lifted. In any case postal affairs have already lost their rigid „state service“ character. Even restricted letter services are dealt with as a part of the larger parcel/postal and express markets as a part of the overall transport market indicating changing perception and regulatory/organizational practice (Panorama of EU-industry 97, Europäisches Parlament 1997). Rather than investigating the national/supranational state of regulatory affairs more closely, I want to focus on the history of change at the company level to examine path dependencies and variations in the process of transnational reorganization.

The breakdown and supranational centralization of the old regulatory and wider institutional structure was a step by step story involving various private and state actors and shifting strategies of private and state actors. The first step of dissolution involved the deepening of the previously established strategic alliance to fend off the integrators. The national postal organizations from Germany, France, Sweden, the Netherlands, and Canada purchased 50 percent of one of the four large global players, TNT. Substantial rumor was out that the company was financially troubled (Bolton 1993) and given the overwhelming strength of the U.S. firms, the formation of the joint venture firm GD Net (headquartered in Amsterdam) in 1991 could be interpreted as an „anti-American“ alliance quite similar to previous European efforts say in airline production. Before this move, the industry was entirely dominated by non European and, most importantly, U.S. companies. The move towards European (and Canadian) collective emancipation, however, destroyed the common, multinational public affairs strategy of all postal administrations vis-à-vis the private integrators and challenged the structure of the private industry alliance with TNT „changing sides“. The European Commission approved the joint venture

after forcing several amendments on the business agreement including a two year limit on exclusive access for the joint venture company to all postal outlets of the five post offices (FT 4.12.1991, 3). Nevertheless, for a five year period the relations between private integrators and public postal offices remained stable overall although the joint venture did not succeed in winning market share.

The public/private alliance of the five post offices broke down in 1996 when the Dutch Post office, KNP, announced the takeover of TNT. KNP was the first national postal operator to be privatized back in 1995. In 1996, the new private European PTT force decided to move aggressively into foreign markets by way of taking TNT Express Worldwide over as well as German carrier NET Nachtexpress, and Danish DTS Express APS. In 1995, KPN already bought Dentex B.V. in the Netherlands and Colandel N.V. in Belgium (Botelle 1998, DVZ, 6.7.1996, 1). After the acquisition of TNT, the reorganized PTT subsidiary including former TNT, GD Net and Dutch postal operations was run by Dutch KPN CEO Ad Scheepbouwer and the former heads of GD, Peter Bakker and John Fellows (DVZ 12.6.1996, 1). Why did the Dutch post office acquire TNT and not say the Portuguese? Apart from the close relations of KPN and TNT given the proximity of the headquarter of GD Net, the history of the Dutch approach to transport industries invites speculation.

Dutch predominance in European transport affairs can be traced back to the middle ages. Only the rise of the British empire cancelled the Dutch supremacy in ocean trade. Given the role the Dutch harbors played (and continue to play) as main ports in Europe, Dutch interests have held a far greater share of subsequent transport than the size of the country or population would suggest. At the same time, the internal economy was always placing Dutch transport industries at a disadvantage against larger neighbors, most obviously Germany, which for example, used its rail services until the mid 1990s to support the North Sea harbors of Bremen and Hamburg against Rotterdam until the European Commission levied a fine against Deutsche Bahn. (Bukold 1996, 155) Unlike other countries centering transport policy more on the internal circulation of freight, the Netherlands started to support its international role in distribution and trade early in history (compare Bukold 1996, 87f.). Quite similar to the early move with regard to post office privatization, the Dutch freight railway NS Cargo (together with British Rail) was the European pioneer in rail privatization in 1995. Not the national infrastructure function, but the inter- and transnational commerce function was supported by the nation state. Quite in line with this national specialization, Dutch representatives (both government and industry) are reported to be extraordinarily active in European transport policy affairs.²⁵ (Interview II, see also Ronit 1995 on the involvement of the

²⁵ In 1993, KPN managed to place the company's specialist on international mail, Jan Sertons, at the European Commission to secure the liberalization

Dutch government in KLM lobby efforts). Material support by the Dutch nation state for privatized KPN in any case was strong enough to support the acquisition of TNT which is likely to secure the former postal office a central position in the wider transport/logistics market. Many co-operators and competitors were completely taken by surprise.

The move of KPN triggered a number of defensive and offensive reactions of other actors. The German post office, in the meantime commercialized and renamed Deutsche Post AG, immediately canceled substantial contracts with TNT's German subsidiary (truckload transport between the major reshaping centers) even making allowance for a prolonged legal battle (DVZ 12.4.1997, 1). Within a year the new competitive strategy of DP AG was worked out under the leadership of CEO, Klaus Zumwinkel. The former McKinsey Manager was called in to guide the transformation of the German post office in 1989 by the Christian Democrat/Liberal government coalition firmly committed to privatize government services - albeit taking a more gradualist approach compared to Anglo-Saxon market radicalism.²⁶ Zumwinkel took the post office job after building a management-led organization at the family run business Quelle, the large catalogue retailer which happens to be one of the largest customers of the post office. Zumwinkel has used much of McKinsey wisdom (and personnel) to reorganize the postal organization apart from continuous government support helping Europe's largest postal organization to survive (and prosper, eventually) (Interview I, Munzinger Archiv 1999).

It became entirely obvious that Deutsche Post AG like other major Postal administrations would transcend the strategic alliance strategy to develop integrated transnationalized organizations when Deutsche Post AG moved not only into Dutch territory but into the major neighboring markets of France, the UK, and Italy as well. Deutsche Post AG did not manage to take over another TNT like company, but managed to snap a share of DHL²⁷, the market leader of the international express business. This market is certain to remain the bottleneck of the new global transport/logistics market of lighter weight/size goods. Two of the international express companies (TNT and DHL) now are operating under control or in the orbit of former national postal operators from Europe.

strategy desired. Serton remained on the payroll of KPN during his tenure as Commission expert. See Tiedemann (1996) on the „Hague network“.

²⁶ On the three stage postal reform in Germany involving a complete overhaul of all kinds of institutions and institutionalized relations see Benz (1997). Though Germany's approach was more gradualist in general, company reorganization and eventually privatization proceeded faster in Germany and the Netherlands than in the UK.

²⁷ Before the 25 percent acquisition of DHL by DP AG, the U.S. company was taken over by Lufthansa and Japanese airline and trade interests. The 1999 takeover of Air Express International (HB 16.11.1999), the largest air freight forwarding company in North America, greatly strengthened the strategic position of DP AG in North America.

Zumwinkel has been reported to boost DP AG's share in DHL (Der Spiegel 29/1999, 85). Thus U.S. (and Australian) competition turned into inner European competition dominated by Dutch and German controlled firms that provide European transnational and international services. Instead of varieties of national postal systems and organizations, varieties of transnationalized organizations emerged. Not only do the postal/express/logistics businesses have to answer to European authorities and regulatory powers. Major customers and suppliers forming a part of their service complexes (to use the analogues term of Ruigrok/van Tuldere industrial complex) come from different European (or other) regions. The centrifugal forces within national arenas working against a consistent national postal monopoly, finally, are far too strong to keep the old institutional structure intact.²⁸

The German and Dutch governments thus were fastest to change minds with regard to the future roles of postal services thereby gaining lead time for the respective national organizations in the course of transnationalized European restructuring. National business systems and national interests clearly continue to play a role with regard to reorganization patterns in transnational business systems. They are of particular importance in the beginning of the transformation process described because other governments coming late can not really do as much for their top clients as the early movers.²⁹

The reorganization story of major European postal offices ended for the time being with the British post office acquiring the German Parcel (GP) network of small and medium companies and French LaPoste acquiring Denkhuis, the major partner of the DPD network of parcel companies. Both network operators (originally thought to be a viable SME alternative to large integrated organizations) came under intense pressure when Deutsche Post AG bought national partner firms such as Belgium Parcel from GP and Italian MIT of the DPD network. The DPD network reacted by turning the horizontal franchise system into a vertical franchise system to make hostile bites into the network more difficult. Unanimous decision making within the network has been replaced by majority voting to allow for easier expansion into new business fields

²⁸ UPS does not only take European post offices to court alleging abuse of profits generated in the reserved market areas. The private watch dog is closely observing the U.S. postal service as well. The U.S. market structure is likely to fall if the European authorities opt for a universal service obligation that does not rely on a reserved market. The incoming EU Commissioner in charge of antitrust, former single market Commissioner Mario Monti, has been reported to continue the probe against Deutsche Post AG started by outgoing Commissioner van Miert (FT 28.7.1999, 2).

²⁹ The focus on social and power relations across borders does not inhibit examination of such relations within borders, it even requests such an analysis. The point is that European institutionalization does not allow for isolated national decisions since EU competition authorities enjoy legal executive rights.

such as electronic storage and e-commerce. (HB 15.1.1998, 38) As evidenced by the La Poste takeover of DPD partner Denkhaus, however, the networks of small and medium companies still seem to lack the long term viability of large, and more deeply integrated (including trans-border operations) companies. All the recent takeovers of larger transport/logistics companies seriously disrupted carefully constructed company relations in international alliances affecting vertical and horizontal arrangements.³⁰

At the very beginning of the dynamic active and reactive reorganization strategies in Europe were the expansion strategies of U.S. competitors who attacked the European postal operators in the European Courts, as well as the U.S. postal service in U.S. courts, alleging abuse of income generated from monopoly services.³¹ The dominance of the big four in the global market may turn out to be the decisive factor influencing company strategies: It will be very difficult for new entrants to invest the amount necessary to built up the infrastructure and to offer services matching the supply structures of the original four. La Poste and the British post office probably would have rather invested in a global integrator instead of buying into the networks. With TNT and DHL gone, however, there was no large company up for sale at the time. Every other player will thus be forced to operate within alliances of dubious stability to achieve reach economies—or have to step aside into other markets still open to competition.

But the global constellation in any case will be mitigated by the regulatory constellation in Europe's multi-level polity, which has been substantially altered in the course of implementation of postal reform. In the old days of strictly national postal markets, the postal offices themselves (as branches of government usually crowned by separate state secretaries for postal and communication affairs) assembled in the „Confédération européenne de postes et télécommunications“ (CEPT) to discuss matters of common concern. In 1993, economic operations were separated from political supervision and regulation. 26 postal organizations formed PostEurop, the Association of European Public Postal Operators (PPO) initially to strengthen cooperation of PPOs. Post-

³⁰ See Hertz (1996) for a case study on Swedish ASG and the airfreight SME network WACO based on dated information since ASG in the meantime has been taken over by Danzas, the new subsidiary of Deutsche Post AG, after a bitter fight between Deutsche Post and Swedish Posten AB. Posten has linked up with other Nordic post offices to reposition itself in the new market structures and the takeover of ASG would have complicated Deutsche Post AG's rapid expansion in the Nordic region. Due to the success of DP AG, however, 20 foreign partner firms had to search for new Nordic alliances since ASG traffic was integrated into the Danzas network (DVZ 14.9.1999, 13).

³¹ The UPS money to buy 16 companies across Europe until 1992 (Hamilton 1990, Bolton 1993) certainly was also generated from a rather privileged business base only available to some companies.

Europe now counts 42 members and is internally much more divided with some postal organizations likely follow individual ways to represent interests or to join forces with some of the previous „enemies“. CEPT on the other hand continues to exist as assembly of the newly created regulatory authorities. Every participant in the highly political transport market had to adjust to new rules of the game. In this business area at least, the effects of cross-national coordination of economic activities has a profound impact on the nature of national business systems, an outcome that calls into question Whitley's (1998) argument that the Europeanization of agencies and institutions leads to reinforced national patterns of coordination and control. The producing national state has been turned into a supervisory multi level competition state in the field of postal and transport markets with a decision due in 2000 on how to arrange for universal services in the future. In particular the cross national dimension of redistribution with regard to employment and working conditions can hardly be overestimated.³²

The transnationalized institutional structure of the European transport and postal market differs greatly from the circumstances the same (and/or other) actors encounter in different regions such as NAFTA-North America. Within NAFTA North America, newly created trans border regimes between Canada and the U.S. even differ from Mexican-U.S. arrangements. UPS, for example, withdrew from intra-Mexican service when Mexico's government banned larger containers in retaliation for president Clinton's decision to delay limited cabotage rights (internal U.S. service by foreign companies) for Mexican trucks. Nevertheless, even in the much less developed North American framework customers and suppliers of transport and logistics services succeeded in substantially transforming strictly national modes of operation. The large logistics companies (mainly from the U.S.) have penetrated the neighboring market and aim to improve single line operations across borders. Increasing North American „continentalism“ was enabled by parallel (if not coincidental) national regulatory reforms and by the creation of specific supranational NAFTA rules. Space was created thereby for the emergence of transnational logistics operations similar to those in Europe. With regard to trans border operations of railroads, North American organizations may even be further advanced after the acquisition of parts of Mexican railroads by U.S. companies and the takeover of U.S. lines by Canadian companies which are now traded at the New York stock

³² All in all, a total of more than 100.000 jobs have been lost in the post services between 1992 and 1995. With the exception of France, Ireland and Luxembourg, all postal offices shed labor (Price Waterhouse 1997). According to the same study, an estimated 100.000 jobs have been created in the courier/express companies which are by and large inferior to the postal jobs with regard to wages and conditions. The extent of job reductions in any case is much larger considering longer periods of time. Employment in the German postal service alone was reduced by 135.000 full time jobs between 1990 and 1998 (company data, Interview III).

exchange.³³ (Plehwe 1997b) North America, in any case, displays an even stronger reliance than Europe on private business forces and relations to arrange for continental permeability.³⁴

5 Outlook: transnational varieties of organizational structures and business associations

My quarrel with most comparativists is that they seem to me not to see the wood from the trees, to overlook the common problems while concentrating on the individual differences.

Susan Strange (1997, 184)

Patterns of transnational logistics suppliers

Looking at the new breed of postal operators only and leaving aside reorganization of other important actors in transport markets such as railroads, airlines, freight forwarders, leasing companies etc. for the time being is still sufficient for observing major lines of reorganization important to transnationalized varieties of business organizations in the field of transport/logistics. To track the major lines of reorganization I have sorted the acquisitions of Deutsche Post AG according to four market segments: 1) traditional mail/parcel, 2) express, 3) general freight, 4) finance/retail. (Compare Table I, Annex).

Expansion of Deutsche Post AG in the areas 1 to 3 can be understood as diversification of the product range (integration of traditional transport market „products“) and as an attempt to build up scale and reach economies crucial to become a first tier transport supplier to customer companies pursuing single modular sourcing strategies. The fourth market area clearly strengthens the home base of DP AG by blending new retail business into the limited postal product range.

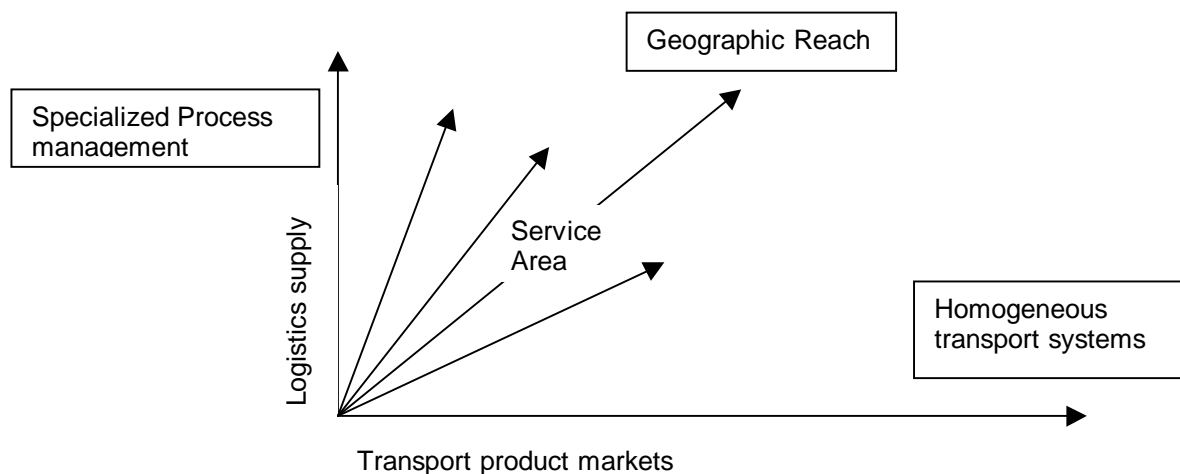
Within and across the various transport market segments, companies acquired by Deutsche Post AG like Danzas or newly set up (like Deutsche Kontraktlogistik GmbH and eVita internet services, see Table II, Annex) are active in value added logistics services extending the scope of the organization

³³ The takeover of Dutch freight railway NS by Deutsche Bahn AG, however, was an important parallel to transnational rail mergers in North America ending the historical conflict between the main European harbor connections.

³⁴ „Permeable fordism in Canada had meant the development of tighter and tighter links with the American economy. Thus, the post-fordist Canadian economy was almost guaranteed to be even more permeable than the fordist one“ (Jenson: 1989, 84).

further along process chains (contract logistics). Most of the contract logistics business is closely connected to traditional transport functions, but there is an enormous variety of specific arrangements between advanced logistics supply companies and users. Contract maintenance and repair, contract marketing, contract manufacturing, and contract selling are all functions to be found in third party arrangements (See Plehwe/Bohle 1998). Companies can then be categorized according to different transport product markets (size/weight/specific characteristics), service areas (regional, national, supranational regional, „global“), and depth of value added services which may or may not be linked to transport product markets depending on firm strategies. Each of the categories are related to commercial and regulatory conditions placing limits on desired strategies (Figure 1).

Figure 1: Three dimensions of reorganization



Point of departure for all the postal companies is the same category of „commercial“ activities: nationally protected and restricted postal product markets considering only the transport related segment (letter/parcel).³⁵ While some companies expand operations along one line mainly (extending self organized reach of traditional postal products like La Poste and The Post Office including limited value added logistics services), other companies expand traditional postal and more recent express products and strongly develop third party logistics activities (UPS and TNT-Post Group). TNT-Post Group, e.g., is very active in automotive logistics. In one large project alone the company integrated several thousand Fiat employees into its Italian subsidiary TNT Traco taking care of Fiat in house logistics operations after organizing Europe wide spare part distribution on behalf of the Italian mass producer. To reinforce this business line the postal/logistics acquired the leading Italian third party lo-

³⁵ Postal reform separated historically telecommunication and postal services in most cases.

gistics firm Technologistica (2.000 employees) and the large French logistics group AGT (ca. 1.500 employed in 39 locations). After the take over of express firms Rinaldi, Spedimacc and Pony Express, Technologistica was the fourth acquisition in Italy within three years adding EUR 361 mio. in turnover in this country. TNT-Post Group now operates a EUR 1.1 billion transport and logistics business in Italy (DVZ 4.3.1999, 12, DVZ 27.4.1995, 16).

Deutsche Post AG so far has displayed the most radical restructuring strategy attacking every single transport/logistics market category of importance at the same time. Reach and scale are being built up in traditional postal and more recent express markets. The new post office ventured dramatically into the higher weight segments taking over leading European freight forwarders. Last but not least, the company has been extremely eager to develop its upstream/downstream logistics capacities in many industry segments. The rejuvenated postal office to be introduced to the stock market in autumn 2000 is supposed to become a DEM 50 bln. transport/logistics enterprise second in size only to UPS (HB 19.4.1999). Apart from DP AG, only Federal Express followed a similar strategy in the U.S. and North America by taking over Caliber Systems, a large general freight company. The company embarked upon the new strategy after its failure to expand operations within Europe a number of years ago (Plehwe 1994, 1997b).

„Big brown“ UPS and „mighty yellow“ Deutsche Post AG as well as the other transnationalized logistics companies are positioned to support customers in industry, trade, and service in their desire to further rationalize production, circulation and office work processes within and across national borders. They combine (or aim to combine) uniform infrastructure services and highly specific and responsive supply chain activities along the value chain more or less related to the core business of organizing and carrying out both material and information flows. Thus convergence (uniform services) and diversity (specialized customer tailored solutions) can be a part of one inter-organizational system and even of one organization. Interaction of convergence and divergence creates something new. European logistics companies seem to develop somewhat faster and better than U.S. companies with regard to the 3rd Party logistics business (Lieb/Millen/Wassenhove 1993, FT 7.10.1997) while U.S. companies continue to lead with regard to industrialized transport systems. The greater European diversity of business systems and organizations may turn out then to be a competitive advantage for companies specialized and eager to bridge countries, cultures, and organizations.

Observations related in this paper in any case suggest the emergence of a special breed of service multinational. While we knew intermediaries (like banks or trading companies or traditional transport firms) and problem solvers (like consultants) in the past, the advanced logistics companies aim to develop a new type of transnational and interorganizational problem solving approach to more deeply integrate supply chains and production networks in regions not

identical to the historical political territories of the nation states. Configuration and coordination of these companies, however, nevertheless depends on institutional relations and regulatory frameworks. Whether the ensuing structures and strategies of the major firms developed so far are here to stay will depend on the ability to integrate rather complex organizations quite different from the historical core around which they are constructed. It is rather unlikely, however, that the national „snail mail“ operations will celebrate a come back and that strictly nationally regulated transport markets and organizations of the past will have a second spring. Reorganized individual firms have created new lobby forces to further restructure the European multi level polity and the institutional frameworks beyond the European regulatory space.

From national business associations and international networks to transnational interest groups

Large customers of advanced transport/logistics services and the large suppliers - once rather opposing interest groups - increasingly work hand in hand to further develop transnational logistics systems as a new type of infrastructure of wider transnational business systems. Depending on social and power relations in national societies and larger (proto) polities like the EU or NAFTA-North America, dynamic and direction of transnational reorganization and institutionalization processes can differ significantly. There can be little doubt about the head start of change agents compared to other groups affected in society.

Apart from recently created transnational associations (as opposed to the traditional national groups and their multinational networks) of (mostly large) private transport supply companies like the Express Associations and Freight Forwarders Europe (combining eight large European freight forwarders), a new „transsectoral“ association of 100 logistics suppliers and users (50:50) has been founded in Europe in 1995. The aim of „European Freight and Logistics Leaders“ is to support „value adding/rationalization partnerships“ by shifting political priorities at the European level. Not any narrow perspective on parts of the transport and supply chain but an integrated approach is supported (DVZ 19.11.1998, 9). A similar perspective is guiding the European Logistics Association (ELA), an expert network of now 35 national logistics associations. (DVZ 10.12.1998, 7) This association assembles public and private know how, academics from universities and research institutes as well as practitioners. In addition to combining national associations from various fields related to transport and logistics, ELA offers direct membership to large companies with the European level association (DVZ 10.12.1998, 7).³⁶

³⁶ In 1997, the first European logistics forum was organized by ELA jointly with the EC Commission (joint project of GD VII transport and III Industry). In 1997 as well, the Commission published a new concept on freight

Not unlike European developments, U.S. and Canadian logistics associations of industrial and trading companies have merged to form the International Association of Logistics Providers in 1994 (Transport Topics 15.8.1994, 6). The new association wants to take the Mexican counterpart in and opened membership to logistics supply firms. In 1995, a new topical group called „Supply Chain Council“ was set up by a U.S. consultant. This Council (somewhat like a multiple single issue movement) combines the largest industrial and trading shippers, important logistics providers (mainly from Anglo-Saxon countries), business software producers (such as SAP from Germany, Baan from the Netherlands, Oracle and Peoplesoft from the U.S.) and international consultant firms. European offices have been opened and European companies are invited to enter the transatlantic dialogue on how to further improve the making of transnational (in this case transatlantic in particular) logistics networks (DVZ 3.11.1998, 1, see documentation of the Council in the internet: www.supply-chain.org). Similar company networks are formed to push Efficient Consumer Response (ECR) issues both in North America, Europe, and most likely elsewhere.

Observers to the European and transatlantic integration processes clearly acknowledge the importance of private business groups driving re-regulation processes (e.g. Transatlantic Business Dialogue serving as an umbrella group for more specialized citizens of the corporate community) (Lankowski 1997). It almost goes without saying that consumer representatives, ecological activists, trade unionists, and regional „grass routes politicians“ are hard to find in these circles. Various researchers consent that we know a lot by now about the relationship of firm strategy and structure at individual and branch level, but far too little about the impact of firms on their political context (Lecraw/Morrison 1996, Ortman/Zimmer 1998, Kohler-Koch 1996). There can be no doubt that the influence and power of large logistics enterprises, business associations and expert groups is constantly applied to further change national, and transnational forms of governance as well as multilateral regimes (lately in the framework of GATT services negotiation rounds). Supposedly, all the efforts are made to enhance „problem solving capacities“ and there is little doubt about enhanced efficiency of new public/private networks. The question to be raised remains, however, which problems are to be solved? ³⁷ Will, e.g., the egalitarian user structure (universal service) Werner Sombart (1969, 346f.) emphasized as the historic innovation and achievement of the postal system in the 19th Century

transport using a systemic transport concept and a logistics approach for the first time (EU Commission 1997).

³⁷ A research project currently undertaken by the author and two colleagues at the WZB will examine whether or not and how reorganization patterns of companies in the field of transport/logistics change organizational patterns and material policies of interest mediation in Europe. Explanatory variables include material and ideational dimensions of company reorganization and take institutional change of the European polity into account.

survive? If not, what are possible alternative means to integrate the state, economy, and society with regard to common infrastructure related services?

The account of European restructuring and reorganization in the field of transport and postal markets has demonstrated that global economic factors and power relations addressed in Global Commodity Chain research are gaining importance in the analysis of state related service sectors due to the partial removal of protective barriers. At the same time, it is clear that the history of change cannot be told without outright political and wider institutional factors to tackle the course of events. Literature in the business system tradition on the other side is both too state centered and incomplete with regard to the polity due to the almost exclusive link of institutional factors to the national society and state. If GCC laundry needs to be „hardened“ by institutional aspects to account for the role of politics - in subject areas like transport/logistics at least - some „softener“ has to be applied to institutionalist research to avoid a tendency of naturalization of social relations. While class and state formation processes have been framed within nations historically, there is no a priori reason as to why national power relations could not be undermined and/or over determined by processes of transnational class and state formation. While transnational organizations in the field of transport and logistics certainly display strong features to be explained by country of origin factors, many aspects of an industry which passed the crossroads of historically significant change cannot be explained with such reference only.

Some things change fast after all. The socialist system in Eastern Germany suddenly collapsed in 1989. We don't know whether this was due to the attempt to model the whole of the economy along the lines of the Deutsche Post organization. Such modelling would be difficult today since the German Post office is neither strictly German nor only a post office. Finally and most unfortunately, German trains tend to always be late these days.

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Annex

Annex: Table I: Deutsche Post AG: Growth by acquisition (either by DP AG or by subsidiary of DP AG)

Company	Markets
Securicor Distribution Meadowsfreight	Parcel / Mail /Mail value added (weight and size limit) UK: Parcel for business, Logistics (Security, Distri., Communication, and business services) Ireland
Ducros Services Rapides MIT	France: Parcel and Express; includes 100% of Transerra in Spain
Netlog	Italy: Express and Parcel freight transport
GP Paketlogistik	Switzerland: parcel
Qualipac AG	Switzerland: parcel
Belgian Parcel Distribution IPP	Belgium: Parcel (former GP partner) Austria: parcel
Servisco	Poland: parcel; first step into the East (Belarus and Ukraine planned); acquisition by IPP
Guijuzcoana	Spain and Portugal: Parcel
Global Mail Yellow Stone	Mail value added U.S.: direct mail service U.S.: direct mail service
Merkur GmbH &Co	Germany: Direct mail, lettershop- and electronic data processing: Services prior to mail services; added-value-services
Siemens Großdruckerei Erlangen	Postal and Printing Third Party Services für Siemens; taken over by DPAG-owned GMS Deutsche Post Logistik GmbH

Company (acquired by DP AG or subsidiary)	Markets
<p>DHL</p> <p>Trans-o-flex</p> <p><i>Trans-o-flex</i></p>	<p>International Courier/Express/Parcel (usual weight limit and size limit)</p> <p>international Express Services, Call Center, Express Logistic Center, Warehousing express services, mainly in pharmaceuticals, cosmetics, electronics and computer hardware (,in-between classical forwarding and parcel service; Distribution; hospital logistics, branch organisations in Aus, NL, Belg. I, DK and Eastern Europe</p> <p>contract logistics, individual sectoral solutions</p>
<p>Air Express International</p> <p>Danzas Freight Forwarding</p> <p>Nedlloyd European Transport Division</p> <p>ITG Int'l Spedition GmbH</p>	<p>Forwarding (LTL/TL Business: no weight and size limit except for extremely heavy and large size freight)</p> <p>Air Freight, Logistics</p> <p>IT-based Logistics (Consumer and Industrie Solutions), Eurocargo, Intercontinental; Food and textile transport; Eastern Europe.</p> <p>Parcel (1/3) and Logistics business (2/3) (Parcel taken over by DPAG-owned enterprise Van Gend & Loos, Logistics and LTL business, larger weight/size by Danzas)</p> <p>classical forwarding company with modern logistics; textile third party services</p>
<p>Postbank + DSL Bank</p> <p>Direct Marketing/Printery/McPaper</p>	<p>Finance and Retail</p> <p>German Banking</p> <p>Retail office products</p>

Sources: Financial Times, Deutsche Verkehrszeitung, various issues: The distinction between Postal/Parcel/Mail markets and express markets is somewhat artificial since in both markets the same freight will be shipped. Variation regards speed, price, and additional services.

Annex: Table II: Deutsche Post AG: „Internal“ Growth: new product development

Company	country	year	subsidiary	market
DPAG		1999	eVita, E-Commerce Services	Internet Commerce for business and private customers
DPAG + trans-o-flex		1998	Europack	international business to business parcels (up to 30 kg in 19 European countries)
	Austria	1997	IPP	Parcel service up to 31,5 kg
	Belgium			
	Poland			
DPAG	Germany	1997	Deutsche Kontraktlogistik GmbH	Outsourcing, Third Party Logistics
		1991	GD Express Worldwide	
			Nordic Data Post International Post Corporation	
			EMS Kurierpost	

Sources: Deutsche Verkehrszeitung, Handelsblatt, various issues.

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