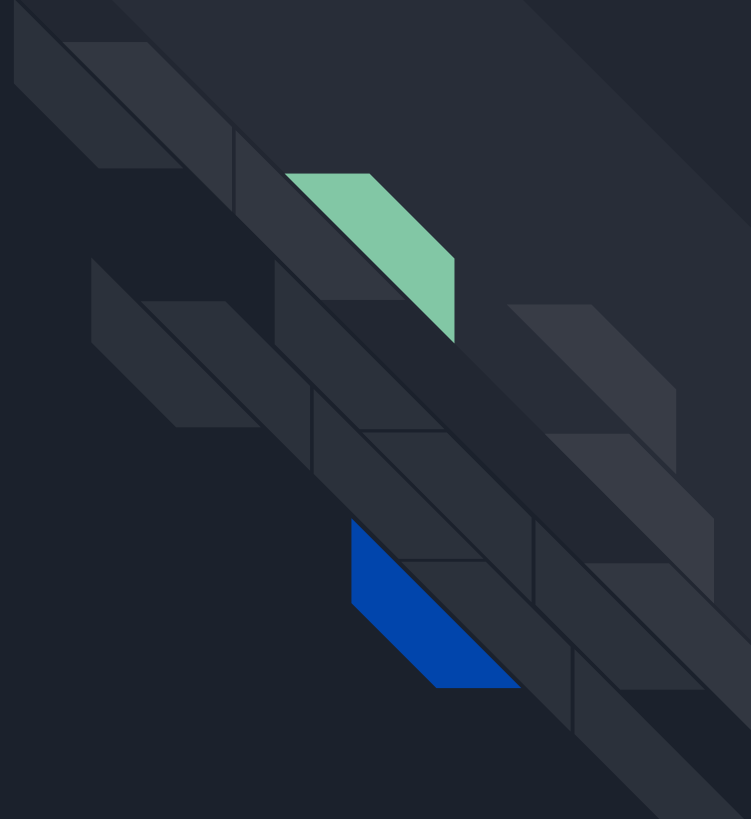




The Future of the Dutch E-Commerce

***“THE BEST WAY
TO PREDICT YOUR
FUTURE IS TO
CREATE IT”***

Abraham Lincoln





Background

- Client: Erik Brunekreef
 - Topcentrum e-commerce, Kennispoort Zwolle
- Zwolle is the major leading e-commerce region in the Netherlands



Central Questions

1. What **factors** will **shape the future** of companies that are active in the Dutch e-commerce industry 5 years from now?
2. What **early warning signs** can be identified that lead towards the developed **future scenarios** within the e-commerce groups located in the Netherlands?



Desk Research

Webshops?

Service Providers?

B2C?

A.I.?

E-Plazas?

B2B?





Field Research - FGD with Experts



Customer service

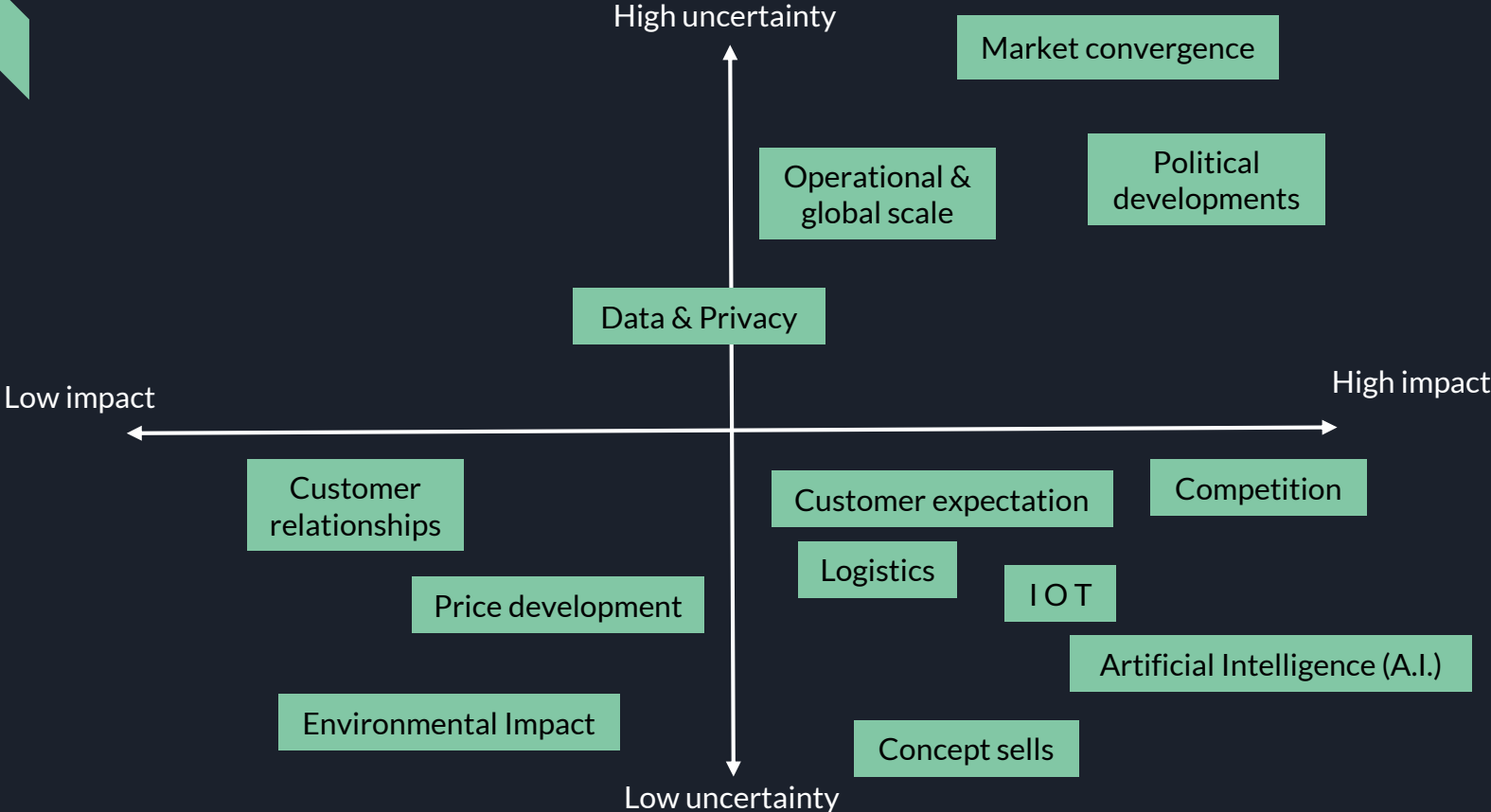
Excellent

Poor

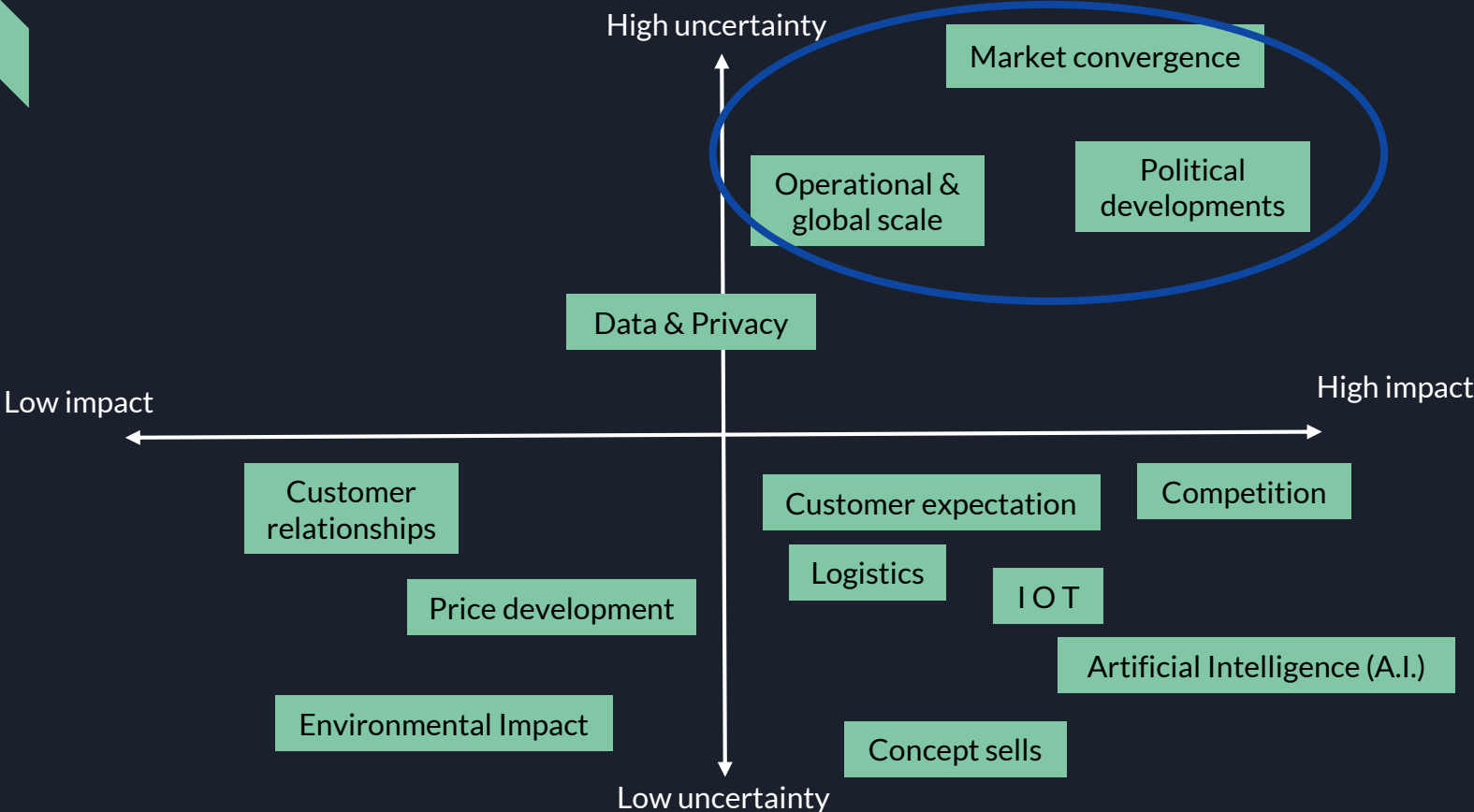
ITS TRADE WAR TIME



Development: Uncertainty/Impact Matrix



Development: Uncertainty/Impact Matrix



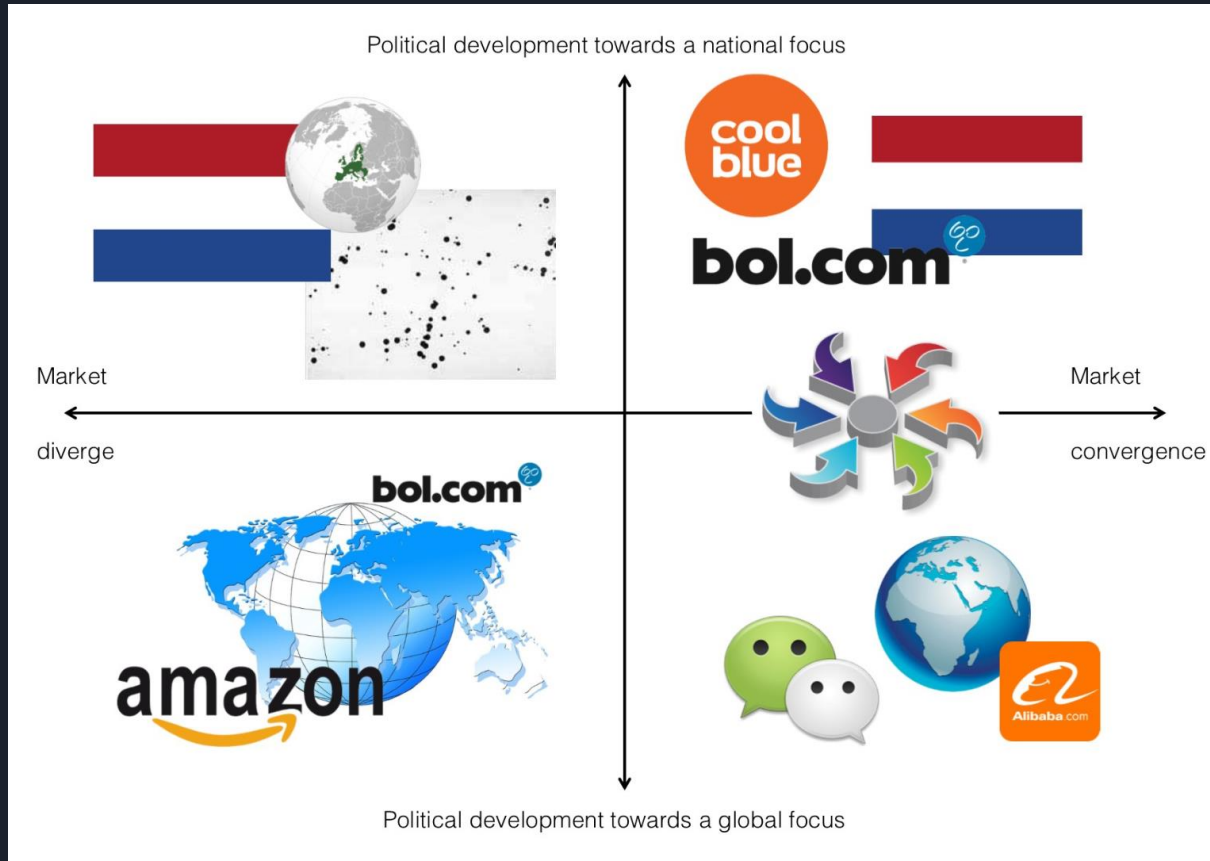


Main Drivers & Extreme Outcomes

- Political development
 - Towards a national focus
 - Towards a global focus

- Market development
 - Convergence
 - Divergence

The 4 Scenarios







Strategy & Advice

Suitability



Legality



Technology





Advice

- Flexibility
- Differentiate the Product
- Low Cost Leadership
- Forward Integration
- Communicate, collaborate and lobby
- Buy out competition
- Reduce over-capacity
- Highlight own strength, brand power
- Be data owner
- Collaborate in different sectors



Early Warning Signs

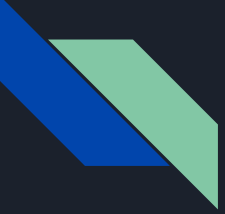
- Trade dispute
- Tariffs
- Digital tax
- Global focus
- Fierce competition
- Purchase of smart devices
- Privacy and data protection laws
- Social credit system





Follow-up Research

- Changing consumer behaviour
- The future of supply chains
- Flexible systems
- New ways and possibilities to cooperate with different organisations



Thank you for your attention!

