



Supply Chain Management

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NEGOTIATIONS IN THE COURIER SERVICE INDUSTRY

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Patras, Greece, January 2024

“Negotiations in Courier Service Industry”

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“Acknowledgments and / or Dedication”

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Negotiations in the Courier Services Industry

Evangelos Mouzakis

Abstract

This dissertation about negotiations in the courier service industry inquires the pivotal role of negotiations in shaping the conditions and outcomes of agreements within this supply chain. While focusing on the courier services sector, the study explores how negotiations serve as a benchmark for fostering mutually beneficial relationships among stakeholders, including courier service providers, distributors, suppliers and final customers. The continuous negotiation process enables all parties to address and fulfill diverse needs such as technological integration, service levels, and compliance requirements wherever it is necessary by the end of courier company in order to maintain the provision of great service. Precision in negotiations is highlighted as a drive lever for improvement, innovation, and risk mitigation within the supply chain. Through detail-driven agreements and examples, the study contends that negotiations lay the foundation for enduring partnerships, contributing to the competitiveness and resilience of the supply chain ecosystem. The dissertation also examines negotiation issues that put extra challenges on the procedure of courier service, emphasizing on the linkage and completion of needs of stakeholders. Furthermore, it explores advanced solutions that enhance the efficiency and effectiveness of courier services.

The insights that have been obtained aim to provide a descriptive understanding of negotiation tactics and opportunities that exist in the dynamic courier services landscape, offering valuable knowledge, outcomes and suggestions.

Keywords

Negotiations, Supply Chain Dynamics, Courier Industry, Last Mile Delivery, Key Performance Indicators, Courier Services, E-commerce, Logistics Operations, Supply Chain Management.

Διαπραγματεύσεις στον κλάδο των ταχυμεταφορών

Ευάγγελος Μουζάκης

Περίληψη

Η διατριβή αυτή εξετάζει τον κομβικό ρόλο των διαπραγματεύσεων στον καθορισμό των περίπλοκων συστημάτων και αποτελεσμάτων των συμφωνιών εντός αυτής της εφοδιαστικής αλυσίδας. Στρέφοντας την προσοχή στον κλάδο των υπηρεσιών κούριερ, η μελέτη εξερευνά πώς οι διαπραγματεύσεις λειτουργούν ως το σημείο εστίασης για την προώθηση αμοιβαία επωφελών σχέσεων μεταξύ ενδιαφερομένων, συμπεριλαμβανομένων εταιρειών κούριερ, διανομέων, προμηθευτών, κατασκευαστών και καταναλωτών. Οι διαρκείς διαπραγματευτικές διαδικασίες επιτρέπουν στα συναλλασσόμενα μέρη να αντιμετωπίζουν αποτελεσματικά τις διαφοροποιημένες ανάγκες όπως την τεχνολογική εξέλιξη, τα επίπεδα παρεχόμενων υπηρεσιών και τις διαδικασίες συμμόρφωσης από την πλευρά της εταιρείας κούριερ όπου αυτό απαιτείται ώστε να διατηρηθεί η υπηρεσία σε υψηλά επίπεδα. Η ακρίβεια στις διαπραγματεύσεις ενεργεί ως καταλύτης για τη βελτίωση, καινοτομία και μείωση κινδύνων εντός της εφοδιαστικής αλυσίδας. Μέσα από λεπτομερείς συμφωνίες, η διατριβή υποστηρίζει ότι οι διαπραγματεύσεις τίθενται ως θεμέλιος λίθος για βιώσιμες συνεργασίες, συμβάλλοντας στον ανταγωνισμό και την ανθεκτικότητα του οικοσυστήματος της εφοδιαστικής αλυσίδας. Η διπλωματική εργασία επίσης εξετάζει ζητήματα διαπραγμάτευσης τα οποία προσθέτουν παραπάνω προκλήσεις στις διαδικασίες παροχής υπηρεσιών κούριερ, δίνοντας έμφαση στη σύνδεση και επίτευξη των αναγκών των συνεργαζόμενων μερών. Επίσης, διερευνά προχωρημένες λύσεις οι οποίες αυξάνουν την αποδοτικότητα και αποτελεσματικότητα των υπηρεσιών κούριερ.

Οι πληροφορίες που αποκόμισα έχουν ως στόχο να αναδείξουν μία περιγραφική ερμηνεία των διαπραγματευτικών τακτικών και ευκαιριών που υπάρχουν στον κλάδο

παροχής υπηρεσιών κούριερ, προσφέροντας πολύτιμη γνώση, συμπεράσματα και προτάσεις.

Λέξεις – Κλειδιά

Διαπραγματεύσεις, Δυναμική Εφοδιαστική Αλυσίδα, Τομέας Ταχυμεταφορών, Παράδοση Τελευταίου Μιλιού, Δείκτες Απόδοσης, Υπηρεσίες Παροχής Ταχυμεταφορών, Ηλεκτρονικό Εμπόριο, Λειτουργίες Εφοδιαστικής Αλυσίδα, Διοίκηση Εφοδιαστικής Αλυσίδα.

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List of Abbreviations & Acronyms

DC : Distribution Center

BRO : Brokerage fees

F/C : Freight collection

COD : Cash on Delivery

PC : Postal Code

B2B : Business to Business

B2G : Business to Government

B2C : Business to Customer

AWB : Air WayBill

ERP : Enterprise Resource Planning

CRM : Customer Relationship Management

1.1 The role of negotiations in supply chain

Negotiations play a huge role in forming the dynamics and outcomes of agreements within the supply chain, serving as keystone for constructing mutually beneficial business relationships among counterparties. These negotiations perform as a pipeline for aligning interests and fostering cooperation between multiple stakeholders such as courier service providers, distributors, suppliers, manufacturers and consumers. The continuous processes of negotiations permit the parties to navigate complexities intrinsic into their interactions. By focusing in negotiations, the parties can address varying needs, musts and non-priorities even if they are related to pricing, technological integration, service levels or compliance requirements. The process of negotiation enables broader thinking for the exploration of common ground and facilitates for the development of long term partnerships.

The real value of negotiations in agreements inside the supply chain, cannot be exaggerated. The negotiations play paramount role in shaping terms and conditions, that can either move forward the supply chain in total or hold it back. Precise negotiations act as an accelerator for improvement and innovation, motivating stakeholders to examine and leverage emerging trends and solutions that would optimize operations in general. Furthermore, detail oriented agreements contribute a lot to the mitigation of risk by providing a framework for managing scepticism in the supply chain. Consequently, groundwork for collaboration is being established and added value is being created alongside the supply chain including the end customers. To sum up, the precision in negotiations constructs solid foundations upon which enduring and robust agreements are built, shaping the competitiveness and resilience of the supply chain ecosystem.

1.1.1 Courier service industry in Greece

The courier services industry began its growth in Greece around the early 1980s, experiencing significant expansion particularly after 1990 and it went through high rates of expansion after the 1990 decade. Between period 1999 to 2008 the annual growth rate

was by average +19.7% (1). During the years of economic crisis of 2008-2018 and especially at the first half of it, the Greek courier industry has been influenced negatively and at the same time the number of companies that went bankrupted drastically arose. After 2013, the courier industry started having positive rates of growth and this can be explained thanks to the following two main reasons:

- The application of law 4053/2012 (2) that foresees the full liberation of courier / post market from Greek state beginning from 01/01/2013,
- The uprising drive of e-commerce to the everyday life of millions of Greeks and the progressive increase of moving parcels.

The private companies of the industry are appealing to a wide range of clients, that include other businesses (Business To Business, B2B), public sector (Business To Government, B2G) and to final customers (Business To Consumers, B2C).

There are two types of postal services companies in Greece, the ones with General Postal license (the number of companies gradually rising after 2016) and the ones with Individual Postal license (the number of companies hasn't changed the last decade, 10 in total number).

The total number of registered companies with General Postal license in 2022 that provide in-Greece courier services via Hellenic Telecommunication & Post Commission was 636 (3), and the number of registered companies that provide courier services for imports / exports to / from Greece is 374 (4). Indicatively, the number of active companies in 2020 was 564, marking an increase of 12.7% in just two years. The geographical distribution of the companies is allocated as following:

- (1) 45.7% in Attica region
- (2) 19.3% in Central Macedonia
- (3) 6.3% in Crete
- (4) 5.2% in Eastern Macedonia and Thrace
- (5) 4.7% in Peloponnese
- (6) 4.3% in Western Greece

- (7) 3.8% in Thessalian region
- (8) 3.4% in Sterea Ellada
- (9) 2% in Western Macedonia
- (10) 1.8% in Ionian islands
- (11) 1.4% in South Aegean
- (12) 1.3% in Epirus
- (13) 0.7% in North Aegean



According to HTPC, almost 85% of moving postal goods has been dispatched exclusively from Attica area, Central Macedonia and Crete. Even though there are hundreds of active courier companies, the vast majority of shipments is been dispatched by just a few of them, which forms an oligopoly and pushes down the average selling price and the profit margin in order to compete based on better pricing. The companies that constitute the oligopoly possess an extensive number of collaborative agents lengthwise Greece as long as lockers which are the new way of receiving a courier parcel in 2023. The two companies that

maintain the greatest number of last mile lockers (and / or first mile lockers) are the following:

- BOXNOW: In September 2023 had 1498 lockers along Greece, the majority of them are located in Athens and Salonica (825 and 281 respectively) (5)
- Skroutz Last Mile : In September 2023 had 1311 lockers along Greece and 1020 lockers are located in Athens and 216 in Salonica. (6)

The industry is very competitive mainly because of big four companies that dispatch almost the 80% percent of the total shipments in Greece. ACS is the market leader with approximately market share of 30%. The second company in market share is Geniki Tachidromiki with almost 20%, the third one is Speedex with 15% and fourth is Greek Posts with 12% cut.(16)

1.1.2 Courier services in Europe

The last few years the volumes of postal letters and parcels in European market are noting a decline. According to a report of European Commission, the sum of value of postal goods in 2018 was 101.8 billion €, indicating an average variation -1.9% per annum in the period between 2014-2018. This downward trend is mainly influenced because of the uprising decline of letter post. On the contrary, dispatch of parcels came up huge because of the increase of e-commerce among European consumers. Between 2014 and 2018, the aggregated increase of parcel volumes was +24%.

The net value of courier / post market increased to 3 billions € in revenues. This paradox (decrease of total amount of moving goods while the revenues increase) is explained thanks to the aggregate increase of +14.2% in revenues from parcels. It is worth to note that revenues from postal letters decreased at the same period of time by 5%.

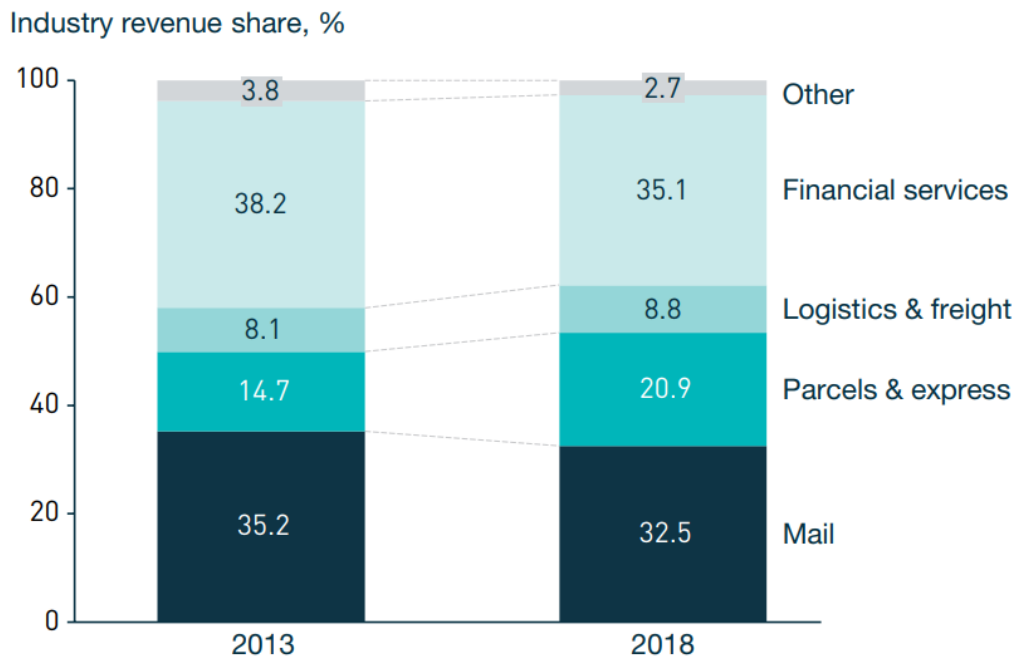
The count of employees in this industry in E.U. was almost 1.8 million people in 2019, depicting an increase of 4.2% compared to 2014, yet decrease of 2.3% compared to 2016.

The trend of the previous years for e-commerce (mainly B2C) is skyrocketing in Europe. The turnover of it is assessed up to 621 € billions in 2019, higher more than 13% comparing to 2018 (7). The greatest percentage of incomes is concentrated in Western Europe, in states like the Netherlands, Belgium, UK, France and Germany. The products that are been dispatched mostly are clothes, sports accessories and equipment. The largest marketplaces in Europe are Amazon (8) , Ebay (9), Ali Express (10) and eMAG (11).

1.1.3 Courier services globally

According to a recent sector study (12), the worldwide industry of courier services reported total turnover of 325 \$ billions in 2019, deploying a 4% increase comparing to previous year. The summary of companies that provide courier services globally are more than 580.000, which employe almost 4.1 million employees. The global courier market is about to increase the volumes of B2C companies and the volumes of envelopes are constantly decreasing (38).

Continuing the increase of e-commerce in global market the past few years, the highly competitive courier industry is facing a consecutive transformation in order to serve the change of needs by the side of consumers, investing huge amount of money capital in equipment, larger warehouses and better / faster communicating channels of distribution. The global e-commerce sales have risen more than 20% in 2018 comparing to 2008 and were 1.6 trillion in 2018 (14).



(12)

Amazon, Alibaba and JD.com are dominating in global e-commerce (35). In 2018, one out of two euros that was spent for online purchases was via its platforms. A lot of online giant retailers, like Amazon and Alibaba do participate more and more actively in the delivery process of their products, a key factor that indicates the plan for vertical integration of their business.

The most significant courier companies globally are UPS (Παγκόσμιες υπηρεσίες αποστολής & εφοδιαστικής | UPS - Ελλάδα) , FedEx (FedEx | Υπηρεσίες express παράδοσης, ταχυμεταφοράς και αποστολής | Ελλάδα) , DHL (DHL Home - Διεθνείς Υπηρεσίες Logistics και Διεθνείς Αποστολές Ελλάδα) , YTO (YTO Express) , China Post (中国邮政集团有限公司 - 中国邮政集团有限公司 (chinapost.cn)) and USPS (Welcome | USPS).

1.1.4 Courier operations

The courier services around the globe are pretty similar and are organized based on logistics operations. Nowadays, the most common service is a shipment to be picked up

from point A, return after a few hours to a sorting warehouse, and the next day to be delivered to point B which can be in the same country or not. The procedure that every courier company has to follow is strict and well structured. When the customer wants to send a package there are a few steps that need to be followed. Firstly, the customer has to put the name of sender as long as with his / her full address (street, number, postal code, area, country) and the telephone number of sender. Afterwards, the customer has to fill in with the receiver's information which entails the same elements (street, number, postal code, area, country and telephone number). Furthermore, apart from the details of the sender and the recipient, the customer has to provide necessarily the full description of shipment (40). At first, which is the material or the object that is going to be dispatched from the courier company as long as the dimensions of package and weight. Regarding weight, it is crucial to mention that the weight that is going to be charged for each shipment may be the real or the volumetric one $[(Width * Height * Depth) / 5000 = X \text{ kg}]$ depending on which one is larger. The weight that is larger, is the one that will define the final charge. Also, another element that needs to be depicted is if there are going to be any extra services for the delivery such as Cash On Delivery (most common for e-commerce), Freight Collection from recipient, delivery till 9 o'clock the next morning (or 12.00 midday, or 14.00 in the noon or till the end of the business day). Another extra service that might appear has to do with Brokerage fees (BRO : only for international shipment and commercial shipments). In this case, it has to be predefined with the completion of Air WayBill (voucher) who is going to pay for this cost. Another thing that can be completed during the generation of the voucher is the column with the comments. In this column, the master of the voucher can write down some instructions for the delivery that may be helpful, e.g. the name at the doorbell is Mr. ABC. Another crucial element for every shipment is packaging. Sender is the one in charge to provide the necessary packaging which is in accordance with the requirements given from courier company. It is quite often unfortunately a shipment not to be picked up from the courier because of not certified packaging. Consequently, the shipment has to be re-packaged from sender in order to travel, which means that in most of the times the delivery is delayed with a business day causing extra costs and frustration.

After filling all the above, sender prints the AWB and sticks it to the shipment in order to be prepared by the time the courier arrives. The driver arrives at the pick up point, checks the AWB if it is correctly completed by sender and if the package is safe to travel.

After this procedure, driver arrives at warehouse where the members of sorting department take action. They sort shipments depending on service type and destination. For example, there is another procedure for the international shipments that have to be dispatched by air in comparison with the international shipments that have to be dispatched by truck. Moreover, there are different cut-offs that have to be followed for each service type because the interconnections that have to be done after sorting are predefined and very strict. Indicatively for international shipments, if the cut-off is going to be overdue by 5 minutes, all those shipments are going to remain at the warehouse this day, and will travel the next business day. This would cause a huge wave of complaints by customers, putting the courier company in great danger regarding its fame and its ability to respond to the promises that have been given to clients. Furthermore, compensation to customers for not delivering at agreed date may be issued which would put an intense problem to the cash flow of the company as long as to its viability and prosperity.

There might be some reasons for not successfully delivering the shipments (not for operational reasons by the side of operator e.g. breakdown of a vehicle): a) the recipient is absent, b) refusal by the side of recipient to accept the shipment (for his / her own reasons), c) incorrect address (wrong PC / street / number), d) change in address, e) no money (in case of CODs / FCs / BROs), f) future delivery at a date that the recipient is going to be available.

Distribution centers operations are very well synchronized. Simultaneously shipments are being sorted and loaded and unloaded to / from the forwarder, airplane, container etc. Usually, there is a conveyor belt inside distribution centers where all the shipments are passing by and scanned and the status update goes to the database and the track n' trace system of each courier company. As a result, the traceability of every shipment becomes live and accurate. Also, regarding the international shipments that have to be processed by customs authorities, there is a specific area inside the distribution centers that is

exclusively accessible by customs officers that clear customs. The above activities are called export operations in courier services.

Apart from the export operations, there are also procedures that are being taking place inside the same distribution centers but early in the morning of the following business day. All the shipments that had been collected from other distribution centers the previous day (in-state or out-of-state) reach the warehouse by any means and are unloaded in the conveyor belt of the distribution center and are processed by couriers depending on specific Postal Codes and route limits that are predefined for each one (15).

1.2 Issues of negotiation in courier industry

The courier services industry stands at the intersection of very complex logistical operations and dynamic interactions among its stakeholders, including courier companies, customers, last-mile carriers, suppliers, technology providers, insurance entities, and the workforce of the sector. In this dynamic ecosystem, negotiations emerge as a critical linchpin, shaping the dynamics and the outcomes of agreements that determine the multifaceted relationships within the supply chain (20). As the demand for efficient and seamless courier services continues to surge and evolve, the challenges and opportunities presented by negotiations become increasingly important, especially if we take under consideration the day to day challenges that appear.

1.2.1 Courier company-Customer

This pair indicate the most crucial relationship inside the supply chain. It is the need of customer for transportation services that has to be fulfilled at first place and which makes the whole supply chain working. Right below there are the main issues of negotiation between this pair.

- Pricing : The primary challenge lies in establishing pricing models that take under consideration the multifaceted relationship while remaining competitive in the market. Customers usually seek cost effectiveness without compromising on qualitative criteria because they are price sensitive. Such negotiations involve volume discounts, features like

track n' trace systems for real time visualization and surcharges for more special and custom-made services. All the above are aiming at striking an equilibrium between expected value and cost.

- Time of pickups / deliveries : Balancing customer expectations about precise time windows for pickups and deliveries with logistics / courier operations is quite a challenge in day to day business (27). The companies aim to meet customer demands for precise timeframes while minimizing costs by optimizing the efficiency of routes. Challenges arise whenever customers demand narrow time windows or even instant service, which consequently bears extra costs, surcharges and different operational management in general.
- More exclusive services : Negotiating such issues depicts a delicate balance between operational feasibility for couriers and meeting unique customer demands. Often it involves discussions about pricing premiums for extra services. Such services could be : storing of customer's goods to the warehouse of courier and shipping right after the generation of a new order, phone call to recipients before delivery or whatever the customer needs to succeed.
- Customer service / demo / onboarding to ERP / CRM software : It represents a complex information exchange between customer needs while ensuring operational processes seamlessly and integrating efficiently systems of those two counterparties. Discussions have to do with onboarding procedures, streamlined tracking, live communication and data processing / storing (28). Furthermore, cornerstone for customer service issues is the addressing of customer queries, complaints and ensuring responsive, yet qualitative customer support feedback.
- For collaborations with government agencies the courier company may negotiate for terms that have to do with security protocols and public regulations (34). Discussions entail the establishment of protocols for handling sensitive, dangerous or restricted items, adhesion of specific documentation and labeling, and compliance with new regulations.

1.2.2 Courier company-Forwarders

Another dynamic pair that is putting through serious negotiation efforts is forwarders with the courier companies. Forwarders play crucial role regarding the interconnections and linehaul among hubs. Some negotiation issues they face are the following:

- Cut-off times regarding interconnections : this issue of negotiation is critical to ensure smooth operations and accurate deliveries within the supply chain. The challenge at this point lies in establishing agreed timetable for pickups and deliveries that would allow to meet customer expectations along with operational optimization. Factors such as varying shipping volumes, geographic restrictions, time in transit impact a lot these negotiations and demand coordination and collaboration between two sides. The precision in setting cut-offs is pivotal as it directly influences interconnectedness of the courier industry in total and the efficiency because everything is interconnected in this supply chain.
- Cost per shipment / per route / weight : This issue has to do with the expenses that are required to be paid by the end of forwarder for the transportation of shipments. Such costs may be administrative costs, fuel prices, labor costs, vehicle maintenance as long as with the margin profit. The challenge lies in striking an equilibrium between cost effectiveness and continuation of standard service level.
- Remuneration : It involves discussions on fair compensation for provided services, incentives for better performance as well as alignment with market reality / standards. Challenges arise in constructing a matrix compensation model that would ensure the profitability of both sides and would encourage reliability, trust and efficiency.

1.2.3 Courier company-Last Mile carriers

Proceeding to the final step of every delivery, last mile carriers are the ones that play a pivotal role for the impression of end customer. For that reason, there are a few negotiation issues that need to be addressed in order to maintain the supply chain in harmony.

- Proof of deliveries : PODs are pivotal for ensuring accountability, transparency and customer satisfaction in the final steps of the delivery process. Discussions often include the establishment of tracking systems that capture, verify and provide evidence of successful deliveries that are irrefutable based on photos, geo-location and signatures of recipients. Challenges may arise while trying to balance operational efficiency, leading negotiations to focus on implementing robust, yet cost-effective systems that streamline the proof of delivery process without any compromise in accuracy. Precision is vital as it impacts customer trust and engagement along with dispute / claim resolution (32).
- Condition of fleet : These negotiations entail responsibilities for upkeep, maintenance schedules and repair costs. Challenges arise in aligning agreed terms while optimizing operational costs, keeping in mind the factor of time. Apart from the mechanical control, since the external surface of the vehicles is often a branding surface, it has to keep up with specific protocols such as to be intact of scratches and clean. It has to do with the overall reputation of the branded company.
- Penalty : These negotiations involve discussions on defining conditions that trigger penalties like late deliveries, missed pickups, damaged parcels, proper scans etc. Negotiations aim to establish clear penalty structures ensuring fairness and alignment with service expectations. Negotiations typically focus on creating incentives for adherence to agreed terms, penalty compensation from the last mile company and written commitment, by the side of last mile company, of taking all the necessary precautions for not repeating the same mistakes again.
- Help with loading / unloading : These negotiations revolve around the definition of responsibilities, protocols, and timelines for transferring shipments between hubs in order to optimize the flow of goods while minimizing transit time. Handling instructions, sorting processes, coordination of mechanisms are points of interest for both companies. Challenges arise while synchronising working schedules of both companies, managing peak times and ensuring the seamless transfer of goods, avoiding delays or bottlenecks.
- Compensation : It is crucial in establishing equitable remuneration structures that incentivize overall performance, reliability, quality of service delivery as long as the economic viability of two companies (24). Negotiations often focus on striking a balance between fixed compensations and performance based incentives that encourage last mile

carriers to uphold service standards. Precision in negotiating compensations is paramount as it impacts directly the morale, retention and dedication of last mile carriers, which ultimately influences the competitiveness and efficiency within the courier industry.

1.2.4 Courier company-Suppliers

Every company in order to succeed needs to have key collaborations and suppliers that can support company's operations precisely, on time and professionally. Some negotiation issues that appear in this pair are the following :

- Equipment like stacker trucks (electric or not), hand pallet truck, handling equipment consumables (stretch film etc) : These negotiations entail discussions on procurement terms, pricing structures, quality standards and maintenance agreements for essential warehouse equipment. The focus lies in striking a balance between acquiring reliable and technologically advanced equipment while managing procurement costs. Also, negotiations often have to do with the ensurement of consistent supply of high quality consumables, maintenance of machinery and bulk purchase discount on service agreements. Challenges arise in aligning equipment specifications with operational needs, ensuring on time supply while maintaining cost-efficiency (21).
- Fuel contracts for a better and more stable fuel price : These negotiations entail discussions on pricing models, volume discounts and strategies that mitigate the impact of fluctuating fuel prices. Negotiations often revolve around long term contracts, hedging strategies or incentives based on fuel efficiency improvements to mitigate the volatility of fuel prices. Challenges arise in forecasting fuel needs, managing costs amidst market fluctuations and ensuring a balance between cost effectiveness and service reliability while not "hurting" the cash flow.
- Leasing contracts (vehicles, building, equipment, laborers, employees etc) : Negotiations about essential assets like vehicles, warehouses and technology infrastructure or even workforce involve lease terms, durations, rental rates, maintenance responsibilities and potential buyouts options (23). The focus lies in structuring leases that accommodate evolving business needs, ensuring access to resources without imposing

undue financial strain. Negotiations revolve usually around creating favorable terms and conditions, including flexible lease periods, provisions for expansions or upgrades and clear responsibilities for maintenance and repairs. Challenges arise while aligning lease terms with growth projections and short time projected volumes and negotiating favourable exit strategies (36).

1.2.5 Courier company-Technology companies

To continue with suppliers from previous sub-chapter, I would like to separate the technology companies with every other supplier. Especially in courier sector where everything is moving so fast, technological advancements and new features could unlock potential optimizations in operations, a key factor for companies that pursue the upgrade of their services (39). Negotiation issues in this pair could be the following :

- Software integrations with e-shops and forwarders : These integrations are critical for streamlining operations and enhancing service offerings within the courier industry. Discussions have to do with API integrations, data sharing protocols, customization options to ensure system compatibility and connectivity between platforms (30). The key points lie in establishing robust integrations that facilitate automated order processing and real time tracking as long as security measures for data interchange and storage. Precision is paramount because no company in this era can succeed in any industry without proper technological infrastructure (22).
- Track n' trace systems : These systems are critical for enhancing reliability, visibility and customer satisfaction. Discussions have to do with the implementation of tracking devices and customization options that obtain and analyse specific data that courier company is interested to. Also, a key point is the comprehensive visibility from the pick up of the order till the final delivery to the recipient and the management of maintenance costs.
- Smart solutions that magnify the efficiency and effectiveness of courier services: These negotiations revolve around discussions on adopting Internet of Things (IoT), Artificial Intelligence (AI), robotics and data analytics that streamline logistics, optimize routing and enhance last mile deliveries (17). The focus lies in establishing partnerships that

facilitate the most on the integration of cutting edge technologies, ensuring scalability and adaptability (41). Challenges arise in navigating technological complexities and managing integration costs (18).

1.2.6 Courier company-Insurance companies / Institutions

In courier services sector there are very strict procedures that are putting the vast majority of operations under complete coordination. But, in every rule there are some exceptions which must be forecasted and covered by insurance companies. Some negotiation issues between courier companies and insurance companies are the following:

- Coverage for damaged or lost shipments : Discussions revolve on insurance policies, coverage limits, claim procedures and premiums to mitigate liabilities associated with potential losses or damages during transit. The focus lies in establishing comprehensive coverage that protects both courier company and its customers, balancing the extent of coverage with affordability. Negotiations often entail defining the scope of coverage, assessing risk factors, setting premiums based on shipment / market value. Challenges arise in aligning coverage terms with diversity based on each customer need, addressing exclusions or limitations in general policies (for warehouse insurance as well) managing costs while negotiating for the optimal insurance coverage with the lowest premium. Precision is critical because in case of need, the insurance company might not compensate if this specific case that arose hasn't been projected before (33).
- Liability issues and compliance with the HTPC regulation : The focus lies in ensuring that courier operations adhere to specific HTPC directives including data protection, quality of service and licensing procedures (25). Challenges arise in navigating complex regulatory frameworks, reporting all shipments along with its fares.
- Protocols for fire safety : It has to do with fire resistant infrastructure and conducting regular audits to ensure that everything is well prepared (29).
- Security technician and occupational physician : They are critical for employee well being, compliance with occupational health and safety regulations. The security technician in Greece is mandatory for all courier companies, but occupational physician is mandatory

only above 50 employees. Those two, often outsourcing service providers, are necessary in case of working accident in order to be compliant with the law (26).

1.2.7 Courier company-Workforce

Last but not least negotiation pair in courier service supply chain is courier companies with the workforce that is employed throughout the industry. Employees play a vital role for the continuation and expansion of every company, especially for the companies of courier sector which are, in general, in phase of intense growth. For that reasons, a key element of success is the “bridging” of negotiation issues between this pair. Such issues may be the following :

- **Wages and compensation :** It is one of the most crucial and negotiable issues in a job interview. The company wants to foster a motivated, productive workforce while balancing financial sustainability within the industry. The focus lies in establishing compensation structures that recognize the skillset, responsibilities while ensuring competitive remuneration and considering economic conditions and cost of living. Challenges arise in aligning compensation expectations with financial constraints, managing wage disparities and addressing workforce demands (31).
- **Extra benefits :** These negotiations take place usually after couple of months in an existing collaboration and have to do with supplementary perks beyond standard compensation such as private healthcare program, wellness programs, flexibility in work schedule and hybrid presence between office and home. Another benefit might be paid educational seminars, programs or trainings. Challenges may appear while managing financial constraints with administrative complexities which will have to ensure the satisfaction of employees and the professional evolution. The career development and continuous training of the working force are great factors that could further evolve the courier company as well.
- **Performance metrics and KPI :** These negotiations are fundamental for establishing clear expectations, driving productivity and aligning individual with company goals. These goals have to be mutually accepted and must be working on every working

day. Challenges arise in selecting meaningful and achievable KPIs fostering a culture where performance metrics drives continuous improvement and support company's success within courier industry. Precision is crucial for employee engagement and accountability (19).

1.3 Working flow in Courier Service Industry

Before proceeding to the questionnaire of this dissertation and final interpretation of results, right below I am quoting the exact working flow of a courier shipment from point a, which is the communication between customers and courier companies that aim to cover effectively the transportation needs by the end of customer till the aftersales procedure that every courier company should make (37).



2. Questionnaire

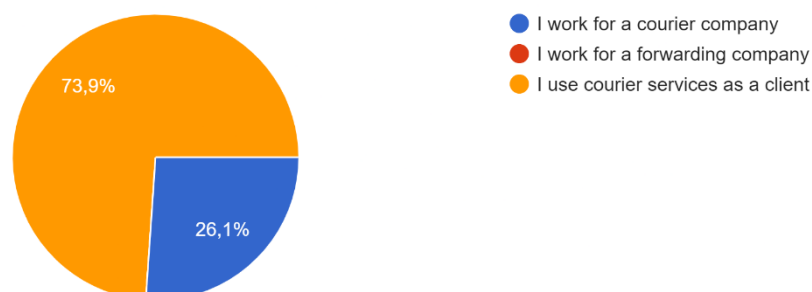
The main purpose of the questionnaire which follows is to understand how clients of courier services and courier professionals perceive negotiation strategies, tactics and efforts inside this industry keeping in mind all the different aspects, positions and views they have for these services. Also, another aim of this questionnaire is to examine if new needs or new service types tend to appear in the near future and how could these could possibly be managed and fulfilled through negotiations with courier services providers. Furthermore, a key element that we want to obtain from this survey is the exact gratification of clients regarding courier services until today and explore possible solutions for the optimization of services.

2.1 Remarks on results

At this questionnaire, I posed 32 questions to audience. The first 17 are more focused to negotiation issues and were mandatory for completion, plus 15 extra questions which were optional and through their completion they helped us to understand the upcoming trends, gaps that increase trouble in the industry and opportunities that arise.

1) Which is your position in the courier services supply chain?

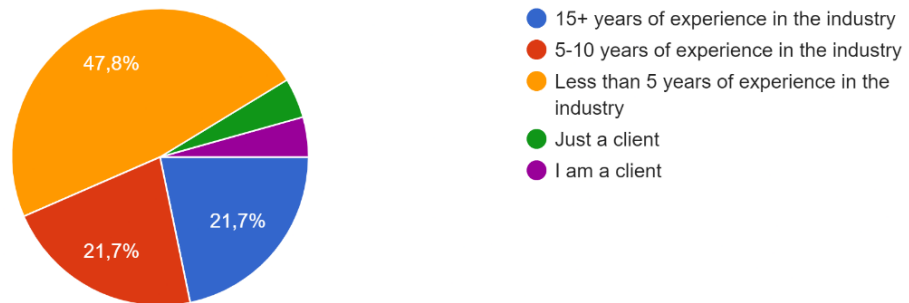
23 απαντήσεις



With the first question, I wanted to separate my sample into 3 main categories. The results indicate that the majority of the researched people are 73.9% clients that use courier services and the remaining 26.1% are professionals that work for courier companies.

2) Please denote which is your relationship regarding courier services supply chain.

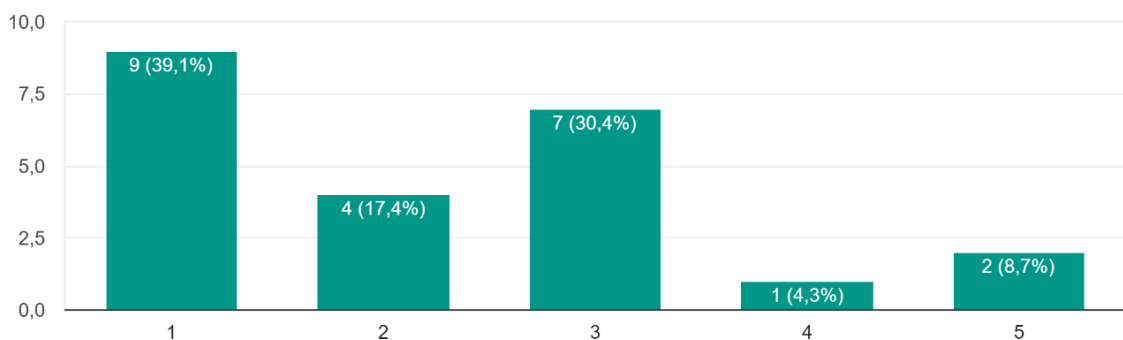
23 απαντήσεις



With this question, I wanted to see how many years of experience do the researched people have in order to keep that in mind for the interpretation of next questions. The results showed that the option of “less than 5 years of experience in the industry” is most popular with 47.8%, with second the options of “15+ years in the industry” (21.7%) and “5-10 years of experience in the industry” (21.7%).

3) How familiar are you with the negotiations in the supply chain of courier industry?

23 απαντήσεις

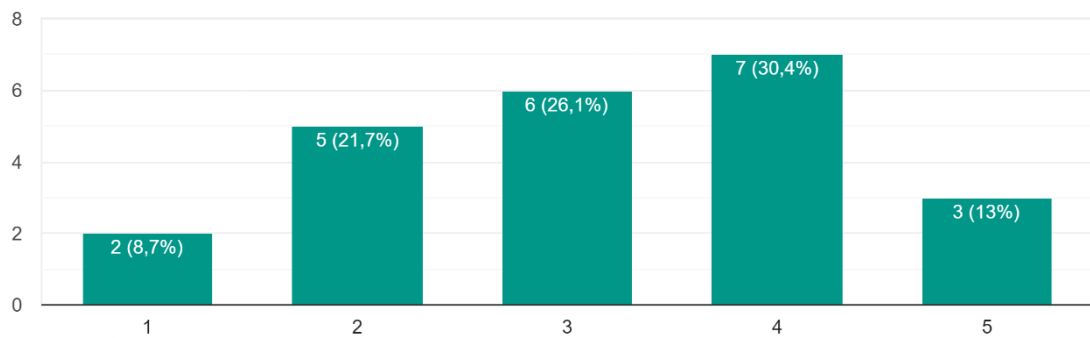


With this question, I wanted to reveal how familiar is my sample on participating in negotiation procedures in courier industry. The most frequent answer is “Not at all” with

39.1% and the second one is “pretty much” with 30.4%. With these results we conclude that our sample has small experience in supply chain negotiations.

4) In the negotiations that you participate, who do you think has more bargaining power?

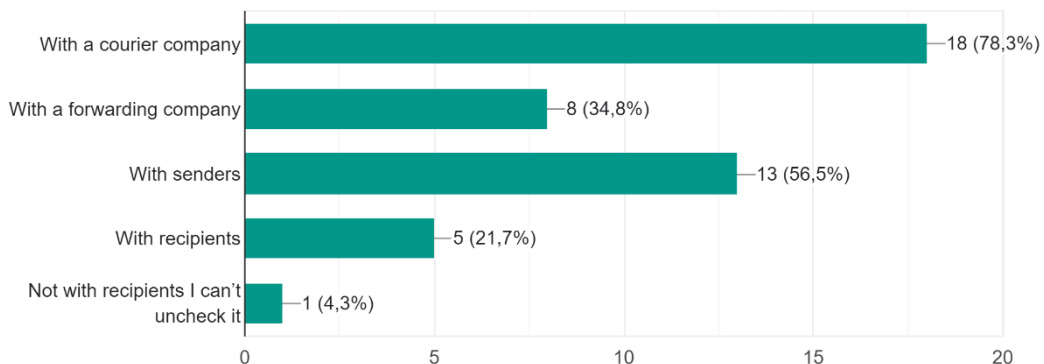
23 απαντήσεις



With question number 4, I see that most of the people tend to believe that the other side of the negotiation table has more bargaining power, something that is in harmony with the results from question 1). Final customers believe that they don't have more power in negotiations with courier companies, putting courier companies in position of power.

5) With whom do you negotiate in the courier supply chain?

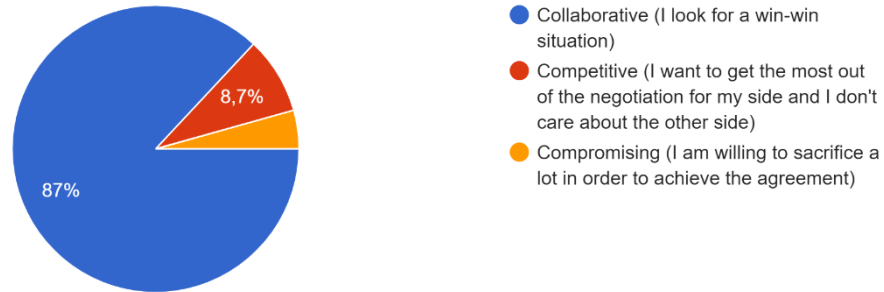
23 απαντήσεις



In the results of this question we see that most of the participants are negotiating with courier companies, then with customers who are senders and afterwards with forwarding companies.

6) What kind of strategies do you think are the most effective during this type of negotiations?

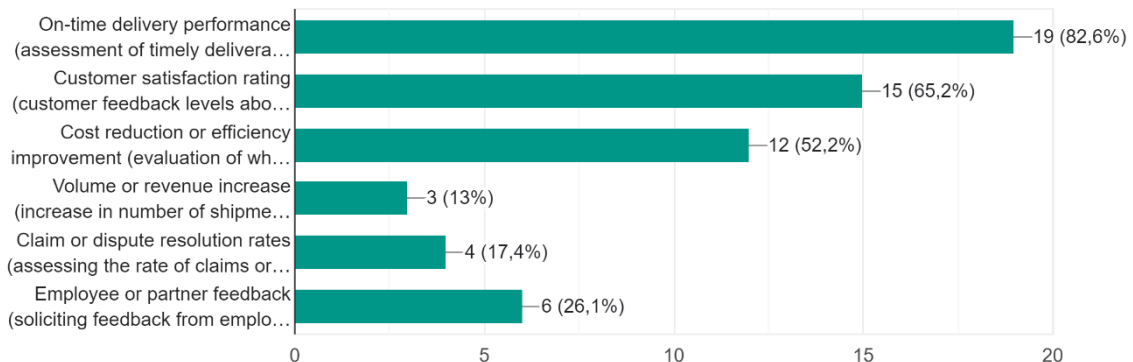
23 απαντήσεις



In this question, I wanted to see which type of negotiation does the sample believe as the most effective. The results showed, the vast majority thinks that collaborative negotiation type is most effective. It can be explained thanks to i) greater value that could be generated for both sides ii) from stability and trust which is going to be developed between them.

7) What kind of indices or criteria do you use in order to evaluate the outcome of an agreement?

23 απαντήσεις

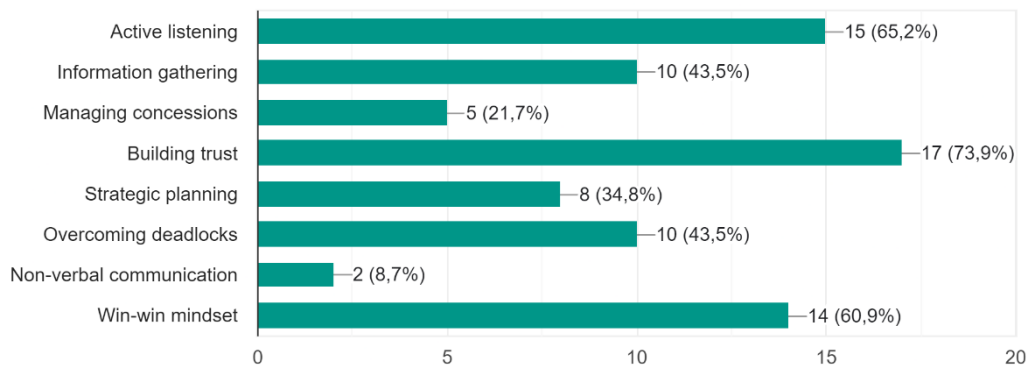


These results indicate that the criteria which are been taken under examination after an agreement for the evaluation of the outcome are firstly “on-time delivery performance” with 82.6% (assessment of timely deliverables against agreed-upon schedules), secondly “customer satisfaction rating” with 65.2% (customer feedback levels about post-implementation of the agreement) and thirdly “cost reduction or efficiency” with 52.2% (evaluation of whether the agreement led to reduced operational costs or improved

efficiency). The first two criteria are more qualitative and the third index is more quantitative in their interpretation.

8) In the process of negotiation with a courier company, which characteristics are the most crucial for them to have?

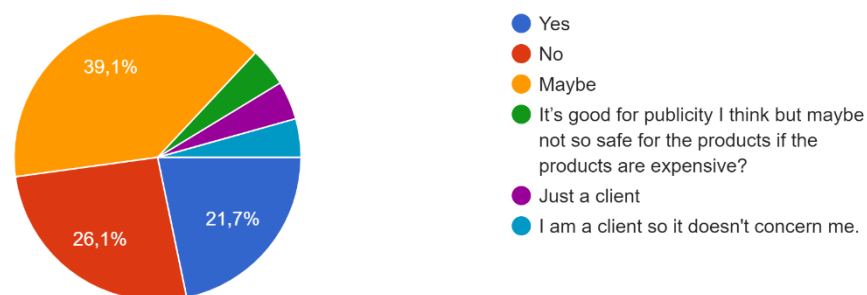
23 απαντήσεις



At this question, we see that 73.9% of the sample selected the option “building trust”, 65.2% chose “active listening” and 60.9% chose “win-win mindset”. These results are aligned with the results of question 6 : the researched ones want more collaborative tactics from the side of courier companies.

9) Are you interested in negotiating about a white label collaboration with a courier company?

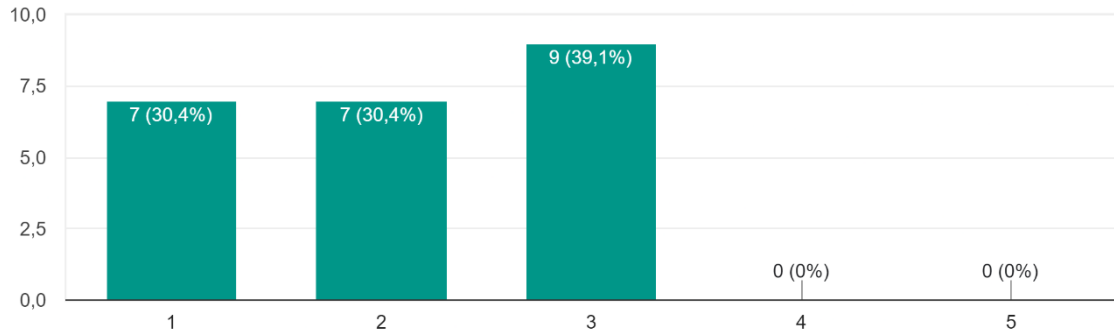
23 απαντήσεις



The answers from this question reveal a confusion by the participants as the option “maybe” is the most common with 39.1% and “no” with 26.1%. Taking under consideration all the other results, we understand that this service is not well-known among customers and they tend to misunderstand the potential advantages.

10) If yes, how much are you willing to pay extra per shipment for the white label service?

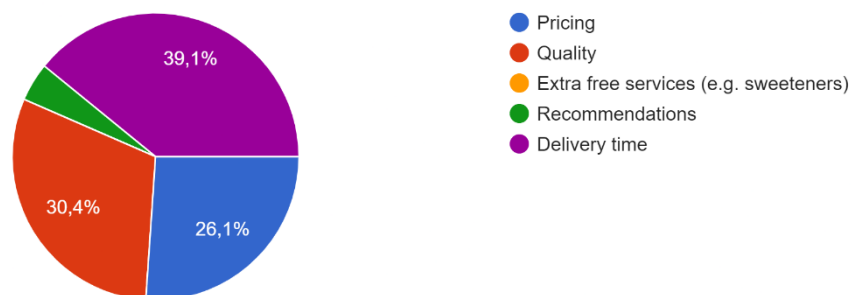
23 απαντήσεις



To continue with the previous question, it is obvious that participants of the survey are not keen on paying extra money for this type of service. All of them are willing to pay less than 50% per shipment for this service.

11) What is the most important issue of negotiations between a courier company and a final customer who is a recipient?

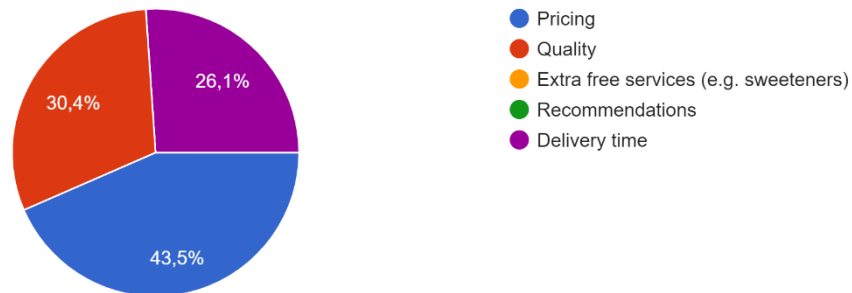
23 απαντήσεις



At this point, I wanted to understand what do the participants weight more as recipients of courier services. The results indicated that their biggest concern is delivery time with 39.1% which can be explained thanks to the hurry and anxiety of receiving the shipment. Quality with 30.4% is their second concern and pricing is the third one with 26.1%.

12) What is the most important issue of negotiations between a courier company and a final customer who is a sender?

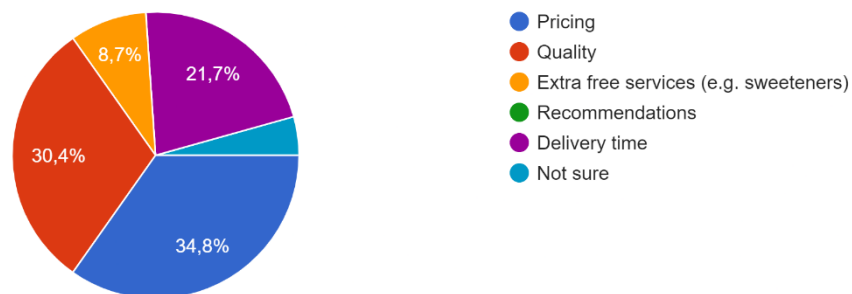
23 απαντήσεις



At this question, the results are slightly different. The most important issue is pricing with 43.5% because usually senders are the ones who pay for courier services. The second choice is quality again with 30.4% and third choice is delivery time with 26.1%.

13) Which is the most important issue of negotiations between a courier company and a forwarder?

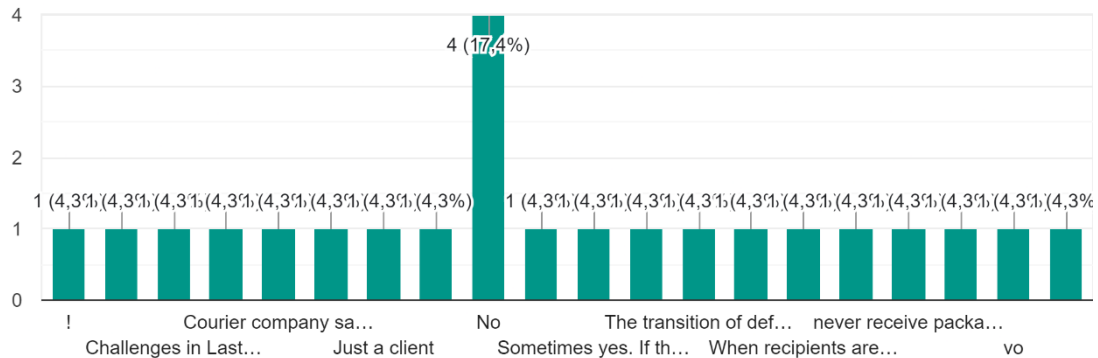
23 απαντήσεις



The most important negotiation issue is pricing with 34.8%. Pricing is very crucial for this relationship and the second issue is quality with 30.4%. Again, pricing and quality of provided services are the main pillars and define if a new collaboration is going to start or not.

14) Have you observed any specific challenges or opportunities related to last mile delivery negotiations?

23 απαντήσεις



The results indicate that most of the participants haven't observed any specific challenge or opportunity in these negotiations. Apart from that, many people have troubles in their communication with courier companies which leads to an unpleasant experience.

15) What specific types of services do you believe that the counterparties of courier companies value the most today? 23 απαντήσεις

Same day delivery, Cash on Delivery, Pickup Points

Delivery options that don't require the presence of the recipient

Sameday delivery

On-time delivery with no losses

Phone call

Having options for standard and express delivery

A better assistance and availability

Sameday Delivery

Same-day delivery, proactive communication such as delivery status updates, and options for multiple delivery attempts are highly valued by counterparties of courier companies today.

Good pricing

Price and quality.

Phone call to recipient before the delivery

Sameday delivery in the evening.

Automatic lockers

100% next day delivery at all times, real-time tracking of the parcels

All those mentioned above as an example

Cost and quality (things dont arrive broken or lost)

Delivery time

I believe that same-day delivery and the option of self pick up by delivery lockers are appreciated mostly nowadays.

With this question, I wanted to see what type of services do the participants value the most today and their first selection has to do with delivery time and especially with sameday deliveries. The second most common answer has to do with the installation of lockers / pick up points in order to provide more autonomous delivery attempts.

16) What are the emerging trends in negotiation priorities in the courier industry in the following years?

23 απαντήσεις



With this question, I wanted to “catch” the feeling on how participants perceive the upcoming trends in negotiation priorities and how will those trends influence their part. The main trends have to do with : agreements on eco-friendly practices, sustainable packaging, addressing data security, real time tracking and returns management. All the above are going to be crucial negotiation issues in courier industry the following years.

17) What role do data analytics and insights play in optimizing negotiation strategies for courier services? 18 απαντήσεις

Its the most crucial part of (almost) every company. Being a data driven company can at least show you what impact every action has to your product/service and if its worth changing it or keeping it. By tracking the activity of the companies you are negotiating with, you can be more aware of their strong and weak points and thus suggest terms that will benefit both parties

A crucial role

Minimizing shipping delays

I don't know. Probably they help the company to adjust their strategies.

It's essential for evaluating improvement points and priorities

Increase Productivity

Data analytics and insights are pivotal in negotiation strategies for courier services. Analyzing delivery performance, demand patterns, and operational costs enables informed decision-making. Negotiators can leverage these insights to optimize routes, enhance service efficiency, and negotiate cost-effective agreements tailored to specific business needs, fostering a more data-driven and strategic approach to negotiations.

Very important

Serious enough

Very important and even more in the future thanks to AI.

Crucial

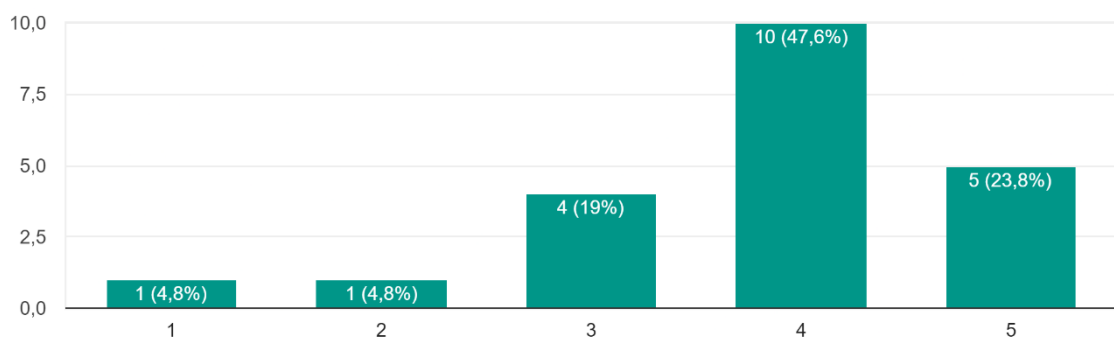
A great role.

Feedback

Data analytics are crucial in evaluating key points, priorities and progress that has been made. By tracking down the activity of the companies that you negotiate with, you can be more aware of their strong and weak points and suggest terms that will benefit both parties.

18) How much do you think the courier service experience contribute to the overall satisfaction and loyalty of the customers?

21 απαντήσεις

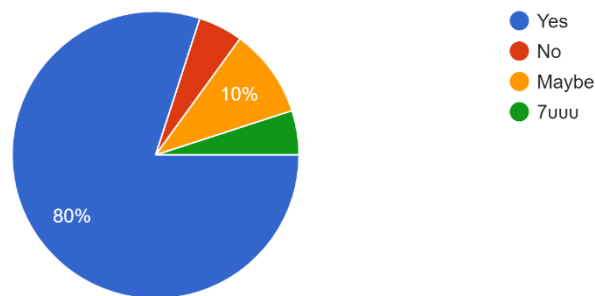


The answers indicate 71.4% (sum of answers 4 and 5) of the participants think that courier service experience contribute almost extremely to the overall satisfaction and loyalty of the customers. The customers identify courier service as the continuation of purchasing

procedure from the shop (or e-shop), and for that reason they connect the item of the shop with the courier experience that they have which leads to customer loyalty.

19) Do you think that transparency in monitoring systems like track n' trace is important?

20 απαντήσεις



The vast majority of the participants (80%) are confident that monitoring systems like track n' trace are important and 10% are not so sure if it is important or not.

20) Are there any niche or specialized services you foresee gaining prominence and becoming negotiating focal points in the industry?¹² απαντήσεις

Alternative type of deliveries (drones/smart point etc)

Special condition's transportation

As the industry evolves, specialized services like precision or temperature-sensitive deliveries, secure medical transport, and eco-friendly logistics are likely to become negotiation focal points. With increasing demand for tailored solutions, negotiating agreements for these niche services could emerge as key strategic priorities in the courier industry.

Fulfillment and logistics

Super market deliveries, hygiene staff

I dont know

Same day deliveries

I don't know.

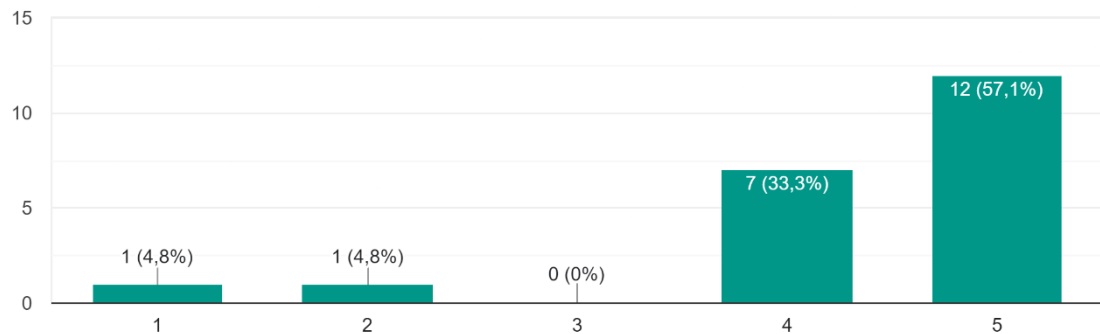
Drop box service and low cost .

AI personalized purchases

The results from this question are very variant. Sameday deliveries, fulfillment services and green logistics, transportation of medical products and temperature-sensitive deliveries are the most representative answers.

21) How important is the existence of a well-organized customer support department for the management of the complaints, problems and disputes?

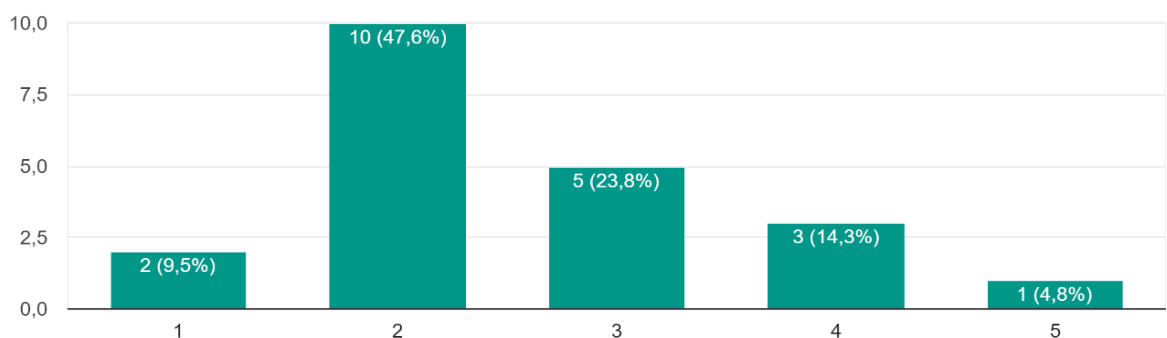
21 απαντήσεις



The majority of the participants (90.4%) think the existence of a well-organized customer support department for the management of complaints, problems and disputes is almost mandatory for the proper courier operations. Problems like changes in address and future deliveries are quite common in courier industry, and can only be addressed with a proper customer support department.

22) There are courier companies that provide outsourcing customer support solutions. Until which percentage above standard courier tariff are you w... provide a bundle with customer support services?

21 απαντήσεις

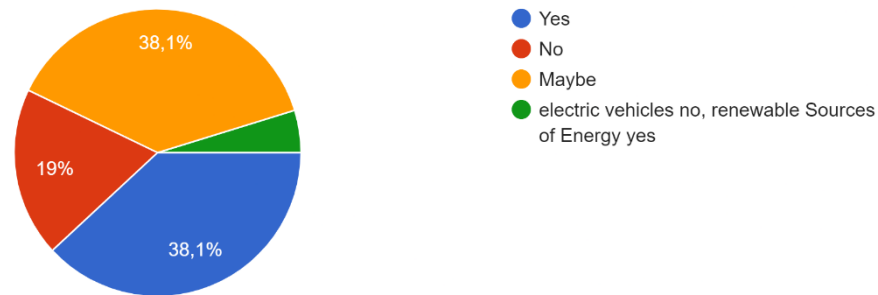


The majority of the participants answered that they would pay 10% above standard courier tariff to the courier company which would provide customer support solutions for their company (47.6% of sample). 23.8% of the sample said they would pay 20% above standard

courier tariff for such service and 14.3% of the sample would pay 30% above courier tariff for outsourcing courier services.

23) Do you reckon as crucial negotiation issue with a courier company the achievement of meager carbon emissions through the use of electric vehicles and Renewable Sources of Energy?

21 απαντήσεις



38.1% of the sample answered that it is a crucial negotiation issue with a courier company the achievement of meager carbon emissions through sustainable practices and the same percentage (38.1%) said maybe it is crucial this issue in their negotiation efforts.

24) What do you think is the most important element for a courier company to have?¹⁷

απαντήσεις

Top customer experience outcome

Accuracy and transparency

Customer support service

An extremely well-organized operations system

Customer services

Transparency, accurate delivery date estimation. Temperature tracking for sensitive products.

Reliability stands out as the most important element for a courier company. Consistent and dependable delivery services build trust with customers and partners, ensuring Satisfaction and fostering long-term relationships.

To deliver as promised.

Kind, experienced staff

Trust and to be present when a problem arises.

Immediatally information

High quality of services

Low cost, quality, nice working conditions and wages

Lot of accessing points and drop box .

Reliability, trust

The participants indicate in their answers more human-centric characteristics like reliability and trust from the side of courier company as long as cutting edge operational infrastructure and results as promised.

25) What charecteristics do you think that the industry of courier is going to have in the next 10 years?¹³ απαντήσεις

Automised procedures and delivery options

AI driven system? AI would probably give solutions to problems. And maybe if AI can't fix the problem then a human would do it manually.

Sustainable approach

The are going to be crucial for the whole commerce industry.

Not far different from today

Even faster deliveries till late hours.

Wiil be change a lot , it will go to lockers in high percents

Big player industry with few niche-oriented smaller companies

I haven't ever thought of that

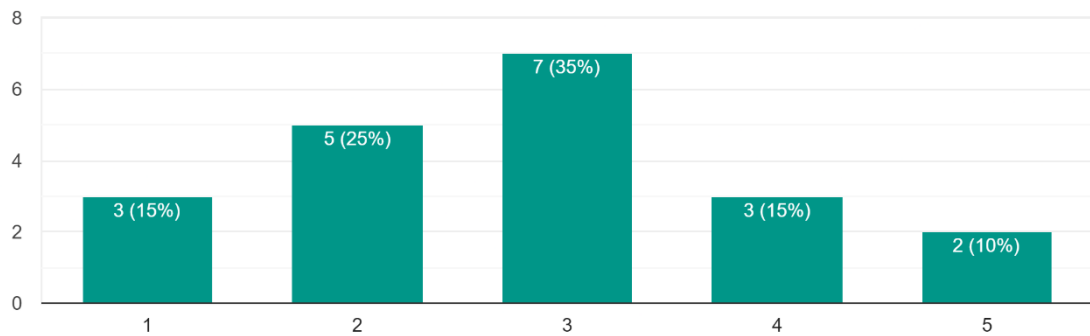
Expansion of dropbox like service

Reliability, trust, AI personalized purchases

Researched people focused on automations and on the contribution of AI tools to logistics procedures. Also, some participants said that the industry of courier won't undergo significant changes in the next 10 years.

26) Do you think the safety protocols that courier companies follow are in accordance with customer's need?

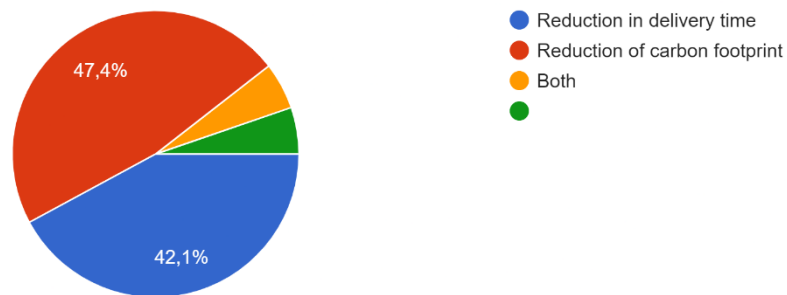
20 απαντήσεις



The majority of sample answered that courier companies neither follow safety protocols in accordance with customer's need nor they follow (35%) which means that courier companies are following basic safety protocols in their operations.

27) Would you rather "push" the courier company within your negotiations for the reduction of delivery time or for reduction of carbon footprint in transportation?

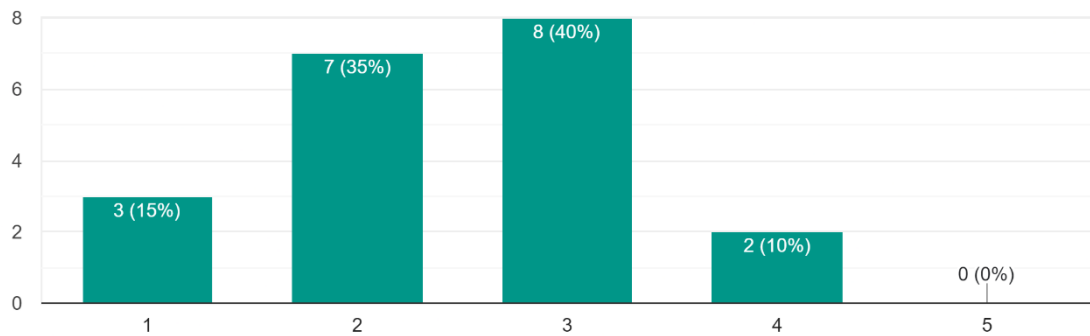
19 απαντήσεις



With a slight difference, reduction of carbon footprint has more resonance from reduction in delivery time (47.4% against 42.1%). This means that both options are almost equally important for the participants.

28) Until which percentage above standard tariff would you be willing to pay and negotiate for your shipments in case of sameday delivery?

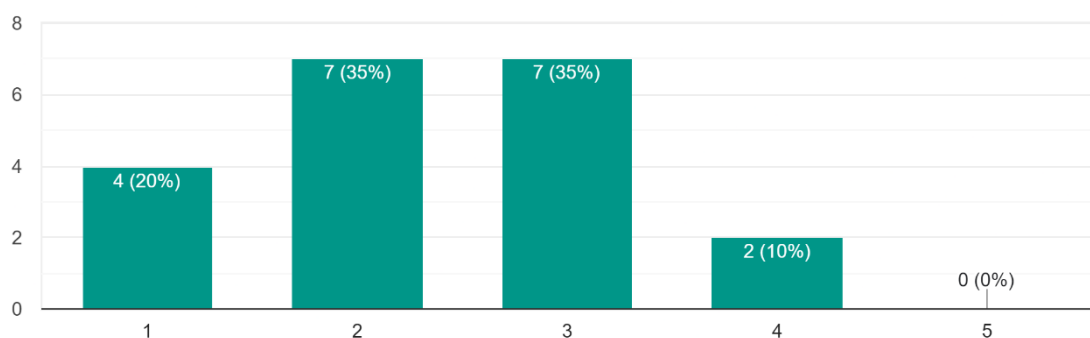
20 απαντήσεις



As it was indicated from the previous questions, sameday delivery is the upcoming trend in courier services. 40% of the sample are willing to pay an additional charge of 50% (on top of standard tariff) in order to receive their parcels sameday. 35% of the sample are willing to pay 25% above standard tariff for the same service and only 15% aren't interested in receiving their shipments sameday (or paying an additional charge for that).

29) Until which percentage above standard tariff would you be willing to pay and negotiate for your shipments in case of money back guarantee option?

20 απαντήσεις

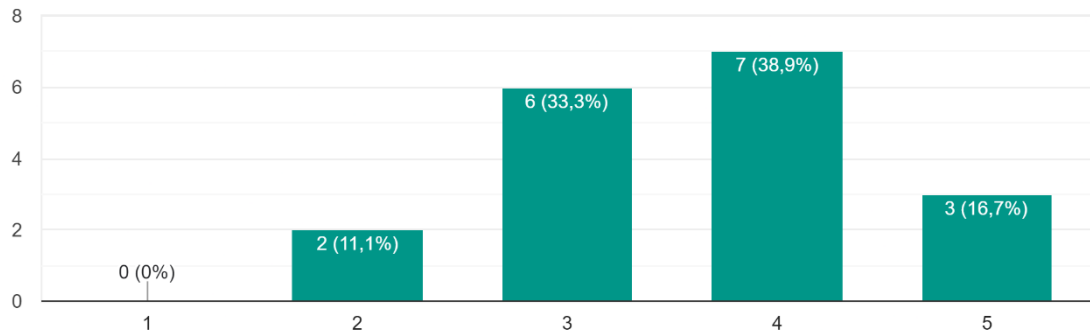


70% of the sample are willing to pay an additional charge between 25%-50% above standard tariff in order to receive their shipments on the exact day as promised on the beginning. This indicates that this sub-courier service has quite a resonance on this sample. Just 20% of the sample aren't interested in receiving this type of service (or paying an

additional charge for that).

30) Do you think that courier companies that offer fulfillment services have more bargaining power on bundled service costs?

18 απαντήσεις



The results indicate that 0% of the sample believes that offering fulfillment services can give a courier company the same (or less) bargaining power on bundle services. The majority of the participants think that these types of courier companies have almost “much more bargaining power”, so we understand it is really important the supply of fulfillment services in courier.

31) In your opinion what factors contribute the most to customer loyalty in courier industry? 13 απαντήσεις

When the courier company meets the agreed delivery times and costs and doesn't change their policy too often

Transparency in the operations and an effective customer service and handling of complaints

Good delivery

Quality, delivery performance, pricing, live updates

quality of services, customer support, fidelity

Customer support handling, friendly staff, good prices

clothes

Good customer service, price

Good service, reliability and low cost.

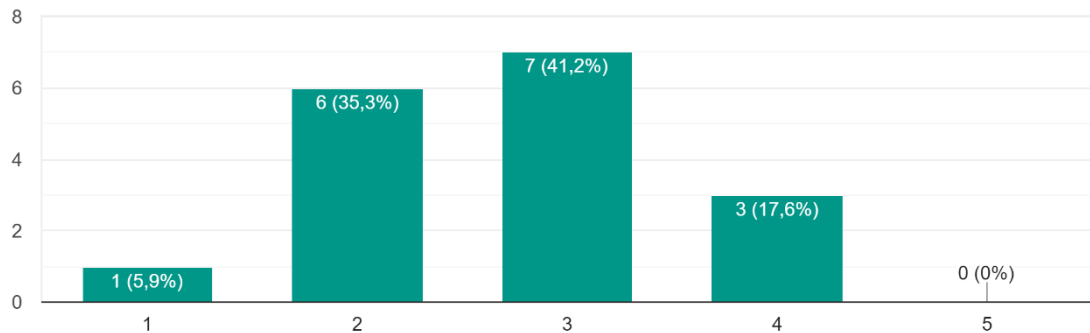
time and hassle free delivery

Reliability, trust

The results indicate that the factors which contribute the most to customer loyalty in courier industry are the following : delivery performance, good / affordable pricing, transparency in operations and customer-centric support operations.

32) How many days do you think form the optimums credit terms for a B2B client?

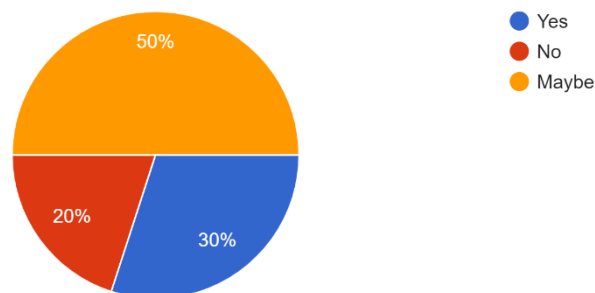
17 απαντήσεις



The most common answer regarding credit terms for a B2B client is 20 days after shipment (41.2%) and the second most common answer is 10 days after shipment (35.3%).

33) Will the non-existence of services like Pay On Delivery and Freight Collection be deterrent of a potential collaboration with a courier company?

20 απαντήσεις



Half of the participants (50%) would think about not proceeding to an agreement with a courier company that does not provide such services but they are not so sure about it. 30% of the sample are really interested in receiving these services and would decline a partnership with this kind of courier companies. Just 20% of the sample are indifferent of receiving these services.

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