

Vortrag Lieferketten



**FRIEDRICH
EBERT** 
STIFTUNG

evangelische **STADT**
AKADEMIE münchen

► Verzweigte Lieferketten

Exhibit E3

Even within the same industry, companies can have very different supply chain structures—and significant overlap.

Companies rely on complex, multitiered, and interconnected networks

Example: Semiconductors, computers and electronics, and communication equipment

Dell

Revenue, 2019 = \$90 billion

Dell's supplier ecosystem is more clustered, meaning it is potentially more exposed to bottlenecks¹

Known tier 1 and 2 suppliers

Dell only

4,761

Shared

2,272

Lenovo only

3,968

Lenovo

Revenue, 2019 = \$51 billion

Lenovo's supplier ecosystem is deeper, meaning it has potentially less visibility²

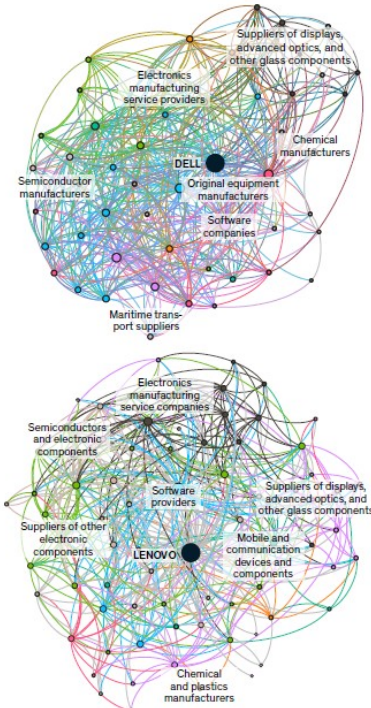


Exhibit 5

The largest companies have thousands of suppliers globally.

Number of publicly disclosed tier-1 suppliers of MSCI companies¹

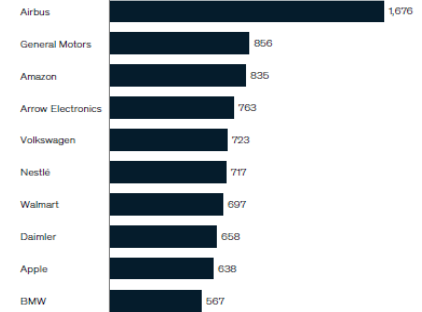
Industries with the largest number of tier-1 suppliers

Aerospace
3.9x
industry median²

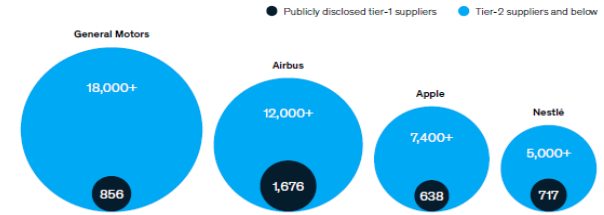
Communication equipment
2.2x
industry median

Food and beverage
1.8x
industry median

MSCI companies with the largest number of publicly disclosed tier-1 suppliers



Beyond the first tier, companies rely on a network of thousands of suppliers



¹ Analysis based on 668 out of 1,371 companies in MSCI index; excludes 57 companies that did not have public information available on tier-1 suppliers and 646 companies that provide services. This constitutes an incomplete estimate of customer-supplier relationships based on public disclosures. Suppliers include providers of intermediate inputs, services, utilities, software, etc.

² Median of simple average of tier-1 suppliers for each manufacturing industry considered.

Source: Bloomberg Supply Chain database; McKinsey Global Institute analysis

► Knüpfen von Lieferketten I



- Natürliche Verfügbarkeit und Vorkommen.
- Erbe des Kolonialismus

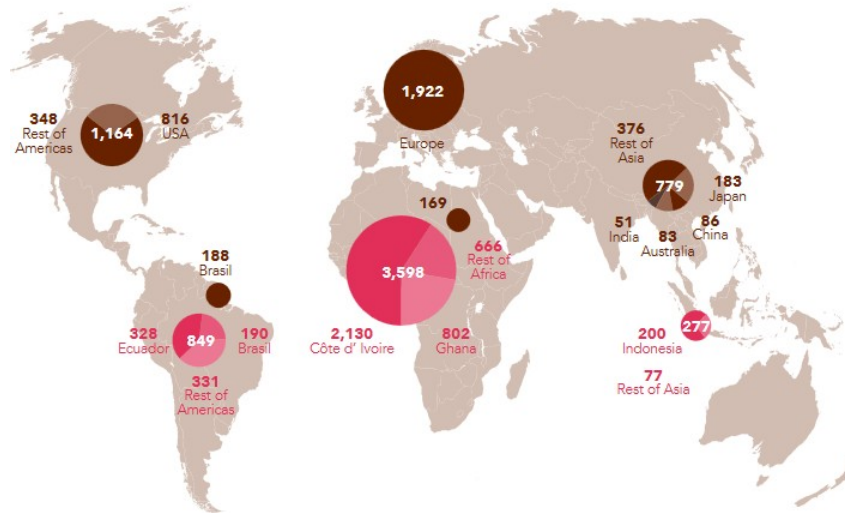
► Resultat der Vergangenheit

Production / Consumption

Cocoa production in 1,000 tonnes 2019/20 (forecast)

Domestic consumption of cocoa in 1,000 tonnes 2018/19

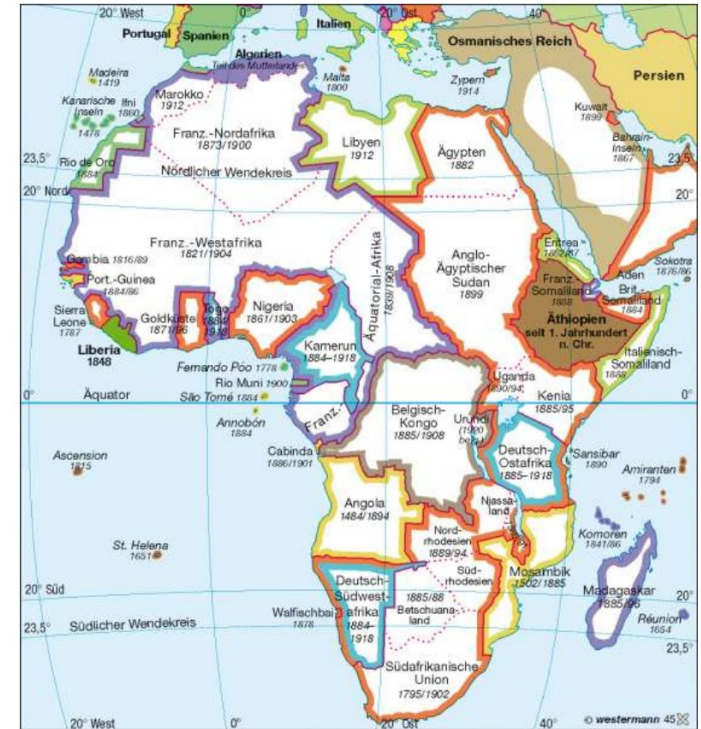
Source: ICCO 2020, Table 2, 40



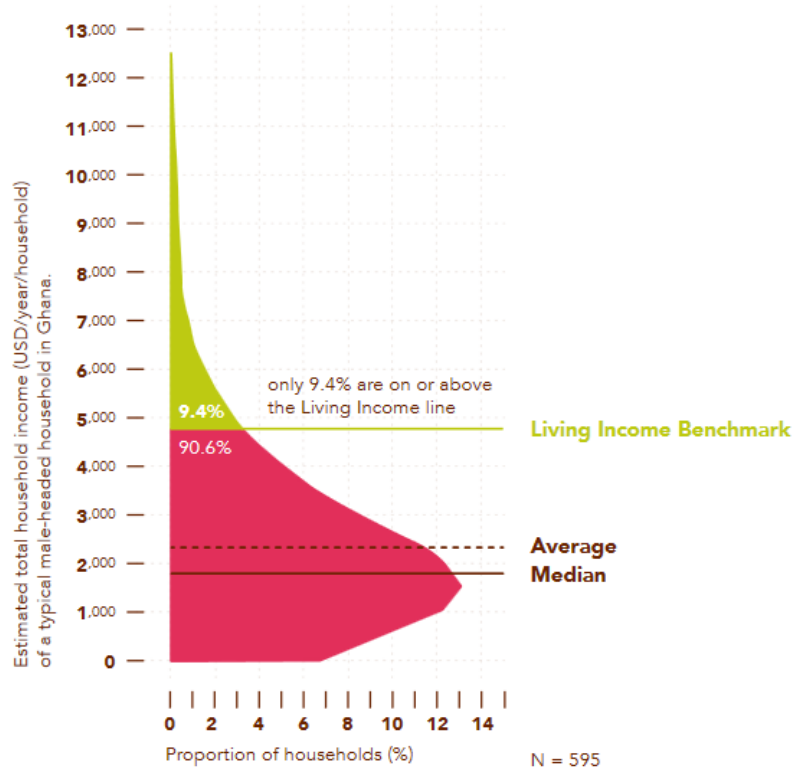
Afrika - 1914/1918

Afrika - politische Entwicklung

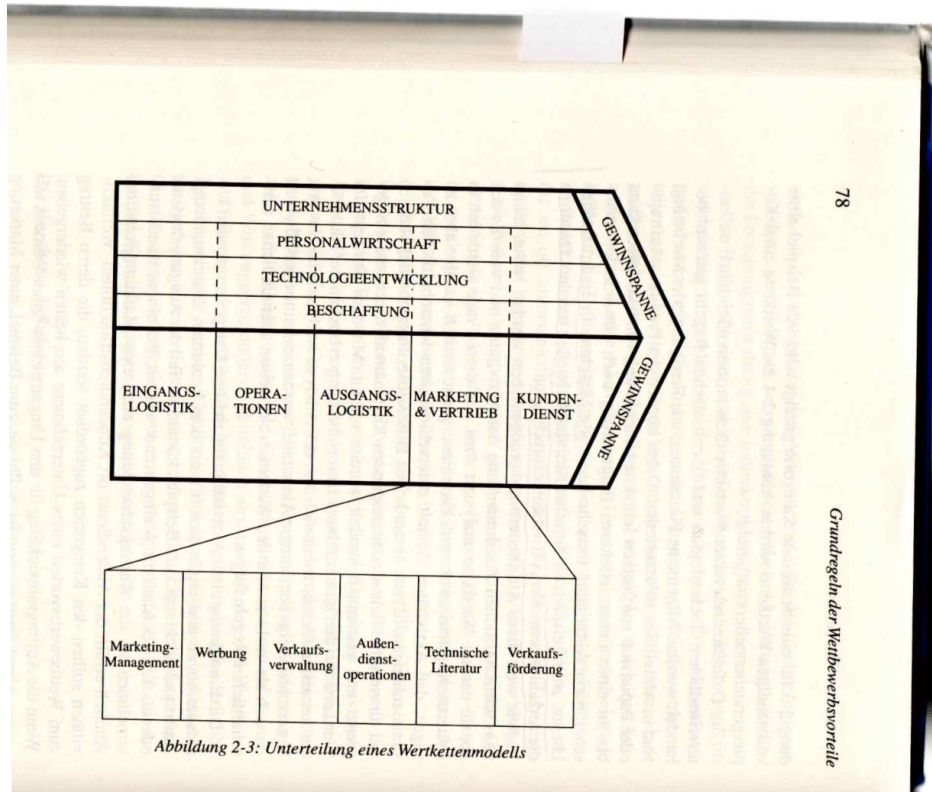
978-3-14-100700-8 | Seite 130 | Abb. 3 | Maßstab 1: 72.000.000



▶ Arbeiten und arm sein



► Knüpfen von Lieferketten II

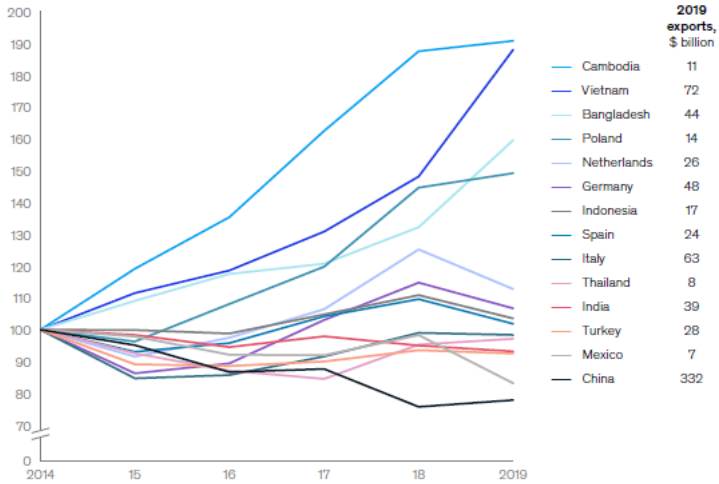


Die Logik der Unternehmen ändert sich.

As China's exports of textiles and apparel have declined, other emerging markets have gained market share.

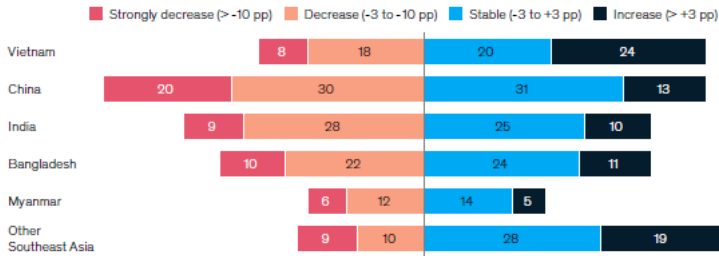
Growth rate, 2014–19, %¹

Index: 100 = 2014



Procurement executives in the apparel industry expect more business to shift to Vietnam and elsewhere in Southeast Asia

Anticipated near-term change in share of apparel sourcing from select Asian countries²

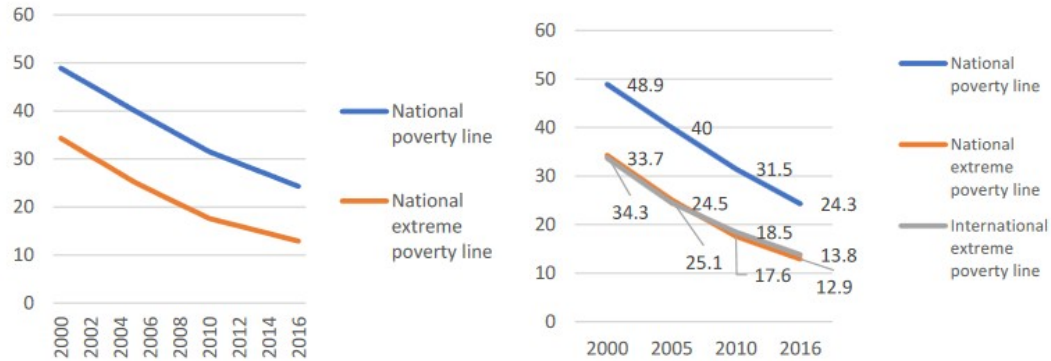


1. Rest of world represents \$284 million in export value and experienced -1 percent growth from 2014 to 2019.
 2. Based on a 2019 McKinsey survey of global procurement executives from fashion retailers and brands (n = 116).
 Note: Figures may not sum to 100% because of rounding.
 Source: ITC Trade Map; UN Comtrade; McKinsey Global Institute analysts

► Die globalen Schneider

► Bangladesch

Figure 12: Bangladesh has continued to reduce poverty

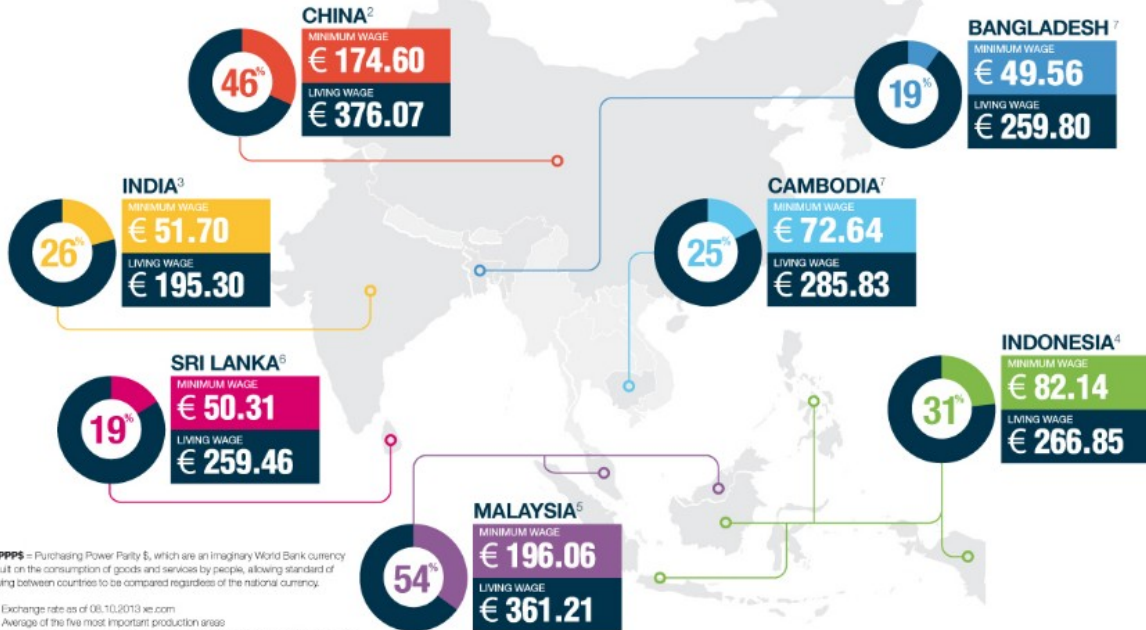


Living Wage versus Minimum Wage

Across Asia governments set minimum wage levels which companies are obliged to comply with. However in every garment producing country the Asia Floor Wage Alliance works in the minimum wage levels fall far below a wage a person could live on. All figures are for a monthly salary.

MINIMUM WAGE VS LIVING WAGE

The difference between the minimum wage¹ and a living wage.
To say instead - The Living Wage is based on the Asia Floor Wage 2013 figure of PPP\$725.



*PPPS = Purchasing Power Parity \$, which are an Imaginary World Bank currency built on the consumption of goods and services by people, allowing standard of living between countries to be compared regardless of the national currency.

¹ Exchange rate as of 08.10.2013 xe.com

² Average of the five most important production areas

³ Average of key regions: Tamil Nadu, West Bengal, Maharashtra (unskilled, Zone II)

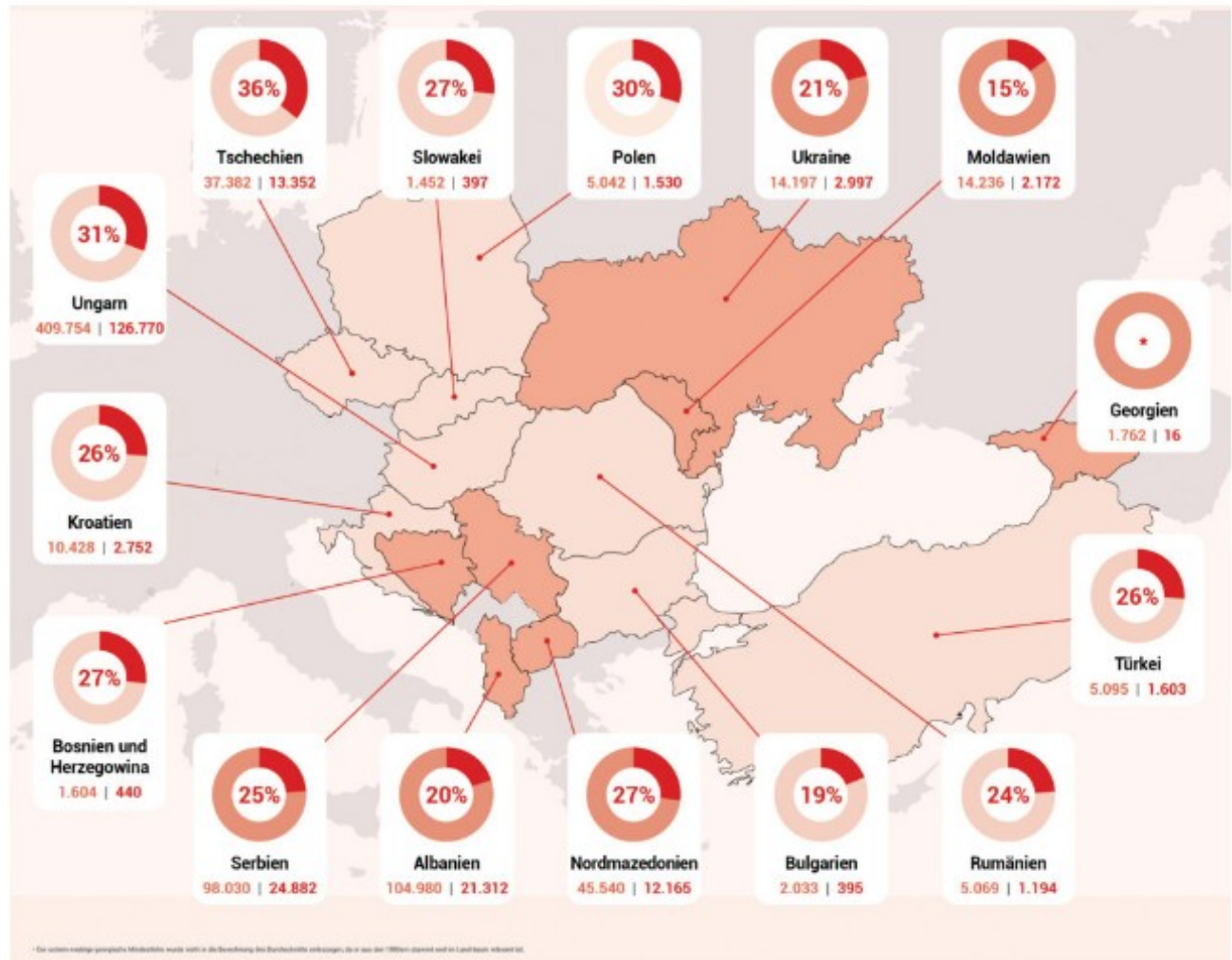
⁴ Average of all provinces

⁵ In July 2012 the Malaysian government announced that workers in Malaysia would receive minimum wages of RM 900 (USD291) for Peninsular Malaysia and RM600 (USD259) for Sabah and Sarawak

⁶ Lowest entrance wage for first year, grade IV and without any bonuses

⁷ Updated to include revised min wage on 24.03.2014, exchange rate xe.com

► Zu wenig für Essen, Wohnen, Gesundheit und Bildung.



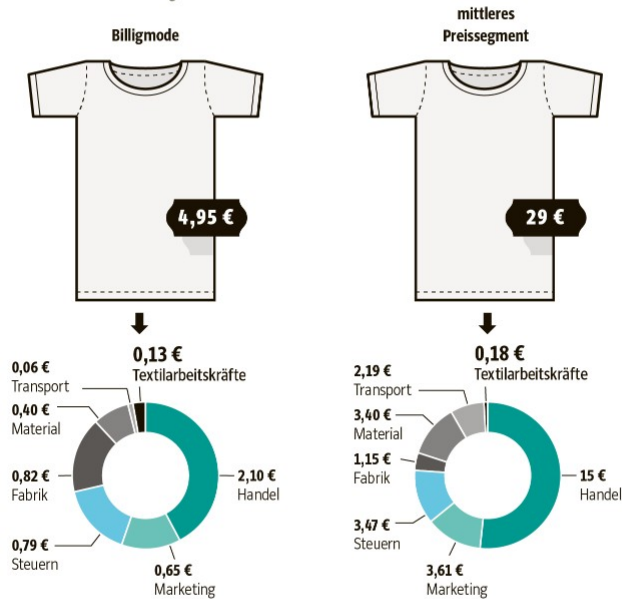
► NäherInnen in Europa

Prozentualer Anteil des gesetzlichen Netto-Mindestlohns am Existenzlohn-Richtwert

► Das Geschäft mit der Kleidung

Das Geschäft mit Kleidung

Die Preiszusammensetzung eines T-Shirts

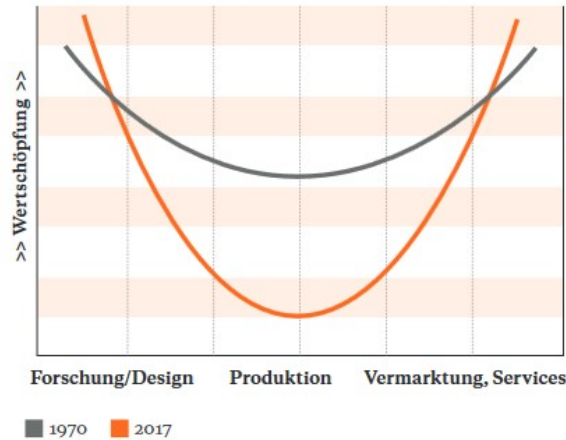


SZ-Grafik; Quelle: Ausstellung „Fast Fashion“ 2015

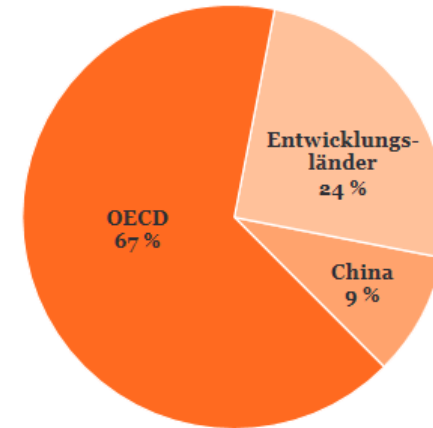
Der Anteil der Werbung am Preis ist fünf bis 18 Mal so hoch wie der Anteil der NäherInnen.

► Machtasymmetrie

Wertschöpfung in Produktionsnetzwerken
Smile-Kurve



Wertschöpfungsanteile in globalen
Produktionsnetzwerken (in Prozent)



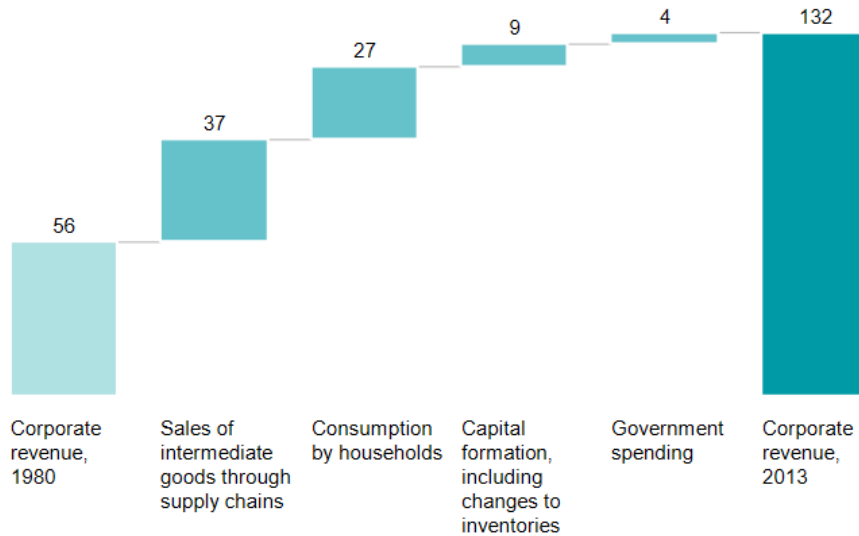
The revenue pool has expanded rapidly, with growth shifting to emerging markets

A remarkable rise in global revenue paved the way for this record profit growth. In real terms, the global revenue pool increased from \$56 trillion in 1980 to more than \$130 trillion in 2013, thanks to growth in consumption, investment, and international supply chains (Exhibit E3). Emerging economies are driving much of this momentum. In 1980, only 20 percent of global revenue came from the emerging world, but by 2013, that share had doubled to 40 percent.

Exhibit E3

New consumers, the globalization of supply chains, and a wave of industrial and infrastructure investment have driven up corporate revenue

Global corporate revenue, 1980–2013
\$ trillion, real



NOTE: Numbers may not sum due to rounding.

SOURCE: World Input-Output database; World Bank; IHS; McKinsey Global Institute analysis

► Konzerne: Explosion der Gewinne

► Der Löwenanteil entfällt auf wenige Unternehmen

Exhibit 3

The top 10 percent of firms account for 80 percent of all profits



1 Sample set includes all publicly listed companies with \$200 million or more in annual revenue in any year between 1990 and 2013.

NOTE: Numbers may not sum due to rounding.

SOURCE: McKinsey Corporate Performance Analysis Tool; McKinsey Global Institute analysis

Gewerkschaften unter Druck II

GLOBALER RECHTSINDEX DES IGB 2020

Die zehn schlimmsten Länder der Welt für erwerbstätige Menschen



Bangladesch

- › Gewalt
- › Massenentlassungen
- › Regressive Gesetze



Honduras

NEU

- › Morde und extreme Gewalt
- › Gewerkschaftsfeindlichkeit und Entlassungen



Philippinen

- › Gewalt und Morde
- › Willkürliche Verhaftungen
- › Gewerkschaftsfeindliche Praktiken



Brasilien

- › Morde
- › Drohungen und Einschüchterungen
- › Brutale Unterbindung von Streiks



Indien

NEU

- › Brutale Unterbindung von Streiks
- › Massenentlassungen
- › Regressive Gesetze



Türkel

- › Entlassungen und Diskriminierung
- › Verhaftung und Strafverfolgung führender Gewerkschaftsvertreter*innen



Kolumbien

- › Morde und extreme Gewalt
- › Gewerkschaftsfeindlichkeit und Entlassungen



Kasachstan

- › Staatliche Repression
- › Zulassung von Gewerkschaften stark behindert
- › Strafverfolgung führender Gewerkschaftsvertreter*innen



Simbabwe

- › Strafverfolgung führender Gewerkschaftsvertreter*innen
- › Gewalt und Drohungen



Ägypten

NEU

- › Zulassung von Gewerkschaften stark behindert
- › Verhaftungen im Zuge von Streiks
- › Staatliche Repression

Gewerkschaften unter Druck I

GLOBALER RECHTSINDEX DES IGB 2020

Arbeitnehmerrechtsverletzungen



Die Zahl der Länder, in denen die Zulassung von Gewerkschaften behindert wurde, hat sich von 86 im Jahr 2019 auf 89 im Jahr 2020 erhöht.



80% der Länder haben das Recht auf Tarifverhandlungen verletzt.



Die Zahl der Länder, in denen die Rede- und Versammlungsfreiheit verweigert oder eingeschränkt wurde, hat sich von 54 im Jahr 2019 auf 56 im Jahr 2020 erhöht.



85% der Länder haben das Streikrecht verletzt.

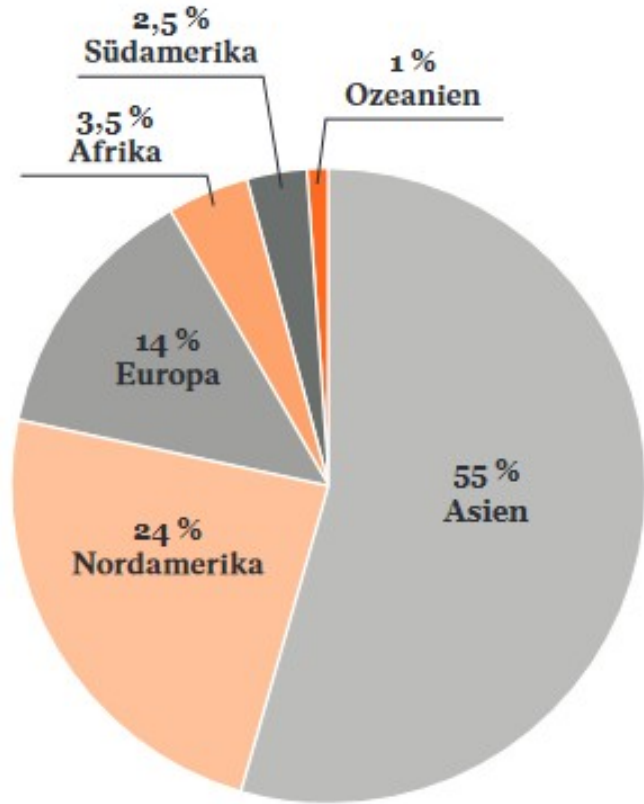


74% der Länder haben Beschäftigte vom Recht auf die Gründung von oder den Beitritt zu Gewerkschaften ausgeschlossen.

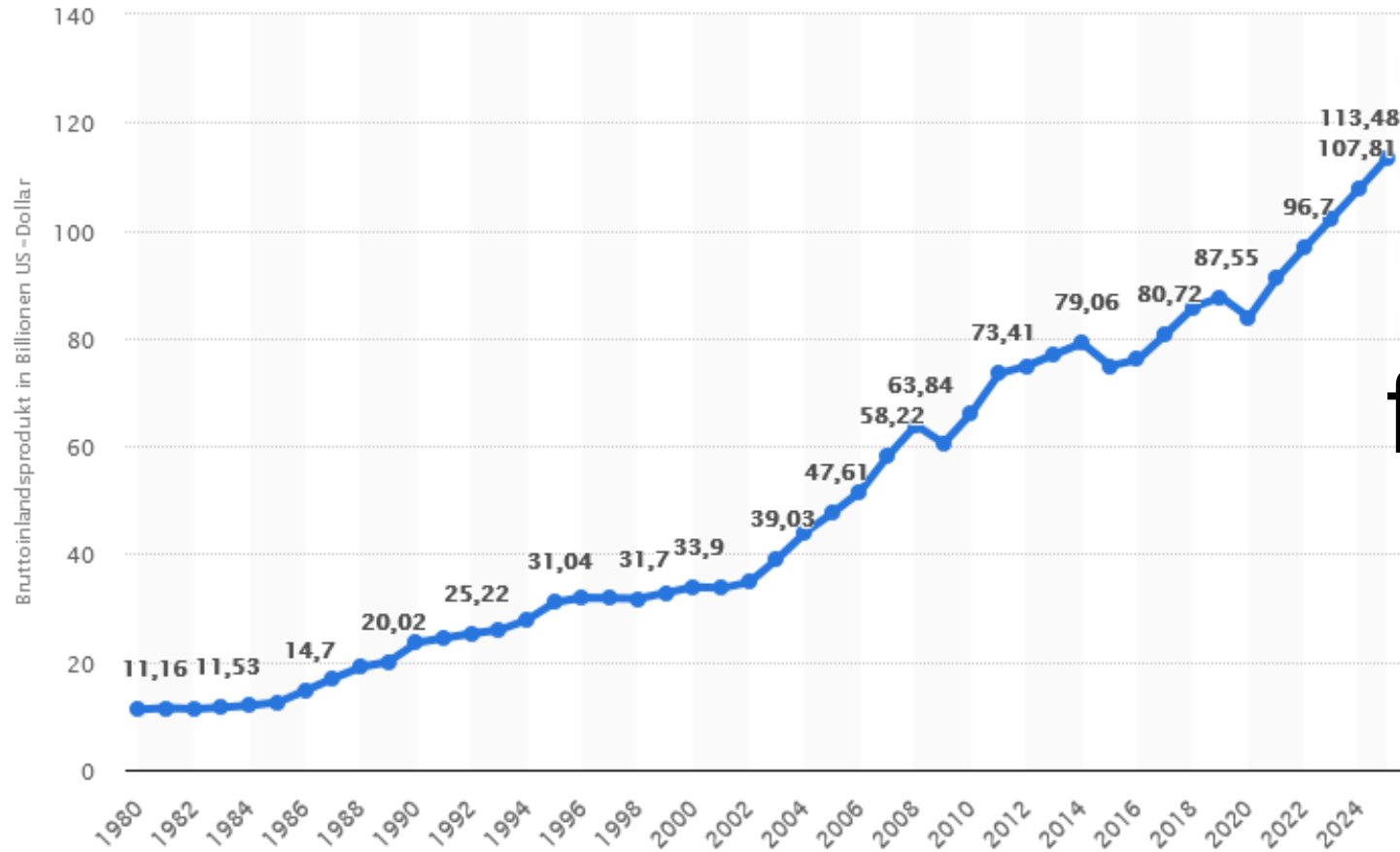


72% der Länder haben den Zugang erwerbstätiger Menschen zur Justiz beschränkt.

Regionale Verteilung der Crowdworker (Anteile in Prozent)



▶ Die
Geschichte
wiederholt sich



► Genug
für uns alle