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# THE PRACTICES OF LOGISTICS SERVICE PROVIDERS IN MOROCCO: THE PARADOX OF COLLABORATION/COORDINATION

**Nohade Ben kaddour**
Abdelmalek Essaadi University, Faculty of Science, Avenue of Sebta, Mhannech II 93002, Tetouan, Morocco, benkaddour.nohade@gmail.com (corresponding author)
**Mohammed Rajaa**
Abdelmalek Essaadi University, Faculty of Law Economics and Social Sciences, Avenue Hassan II, Martil 93150, Tetouan, Morocco, mohammedrajaa@yahoo.fr
**Abdellatif Medouri**
Abdelmalek Essaadi University, National School of Applied Sciences, Avenue of Palestine, Mhannech I 93002, Tetouan, Morocco, amedouri@gmail.com

***Keywords:*** outsourcing, performance, logistics service provider, logistics practice, supply chain management
***Abstract:*** This article examines the practices of logistics service providers (LSP) and the most outsourced services in Morocco through an empirical study based on a questionnaire answered by various foreign and Moroccan logistics service providers as well as dealing with the impact of outsourcing on the performance of industrial companies with increasing competitive pressures and globalization. These companies have developed the strategy of logistics outsourcing which is a process that companies are increasingly resorting to. It is for an industrial or commercial company means "entrusting all or part of a logistics chain, previously carried out internally, to an external service provider".

## 1 Introduction

The new context in which Morocco is evolving inevitably leads to increased competition on global markets. To fully grasp Morocco's competitive advantages, we are conducting a study on areas of improvement in logistics that could boost the Moroccan economy by bringing out new services that are essential to multinationals by bringing out new services that are indispensable to multinationals, such as the new trend 'outsourcing strategy' and the emergence of service providers with multiple levels of logistics services.

Significant work addresses the process of choosing to outsource, particularly in the company's international activities [1], or describes the process of purchasing logistics services [2]. Most often, the literature analyses the logistics service provider-customer relationship through one of the two players in the dyad. Thus, the approach to outsource from the customer's side is extensively analysed in terms of the customer's perception of the outsourcing of logistics activities [3] particularly on the European market [4], the purchase of services by the client and the prioritization of selection criteria [5], methodologies allowing the implementation of outsourcing and the transfer of outsourced activities to the service provider [2] or according to the performance perceived by the industrial client [6], or the perception of the skills and performance of the logistics service provider by the industrial client [7].

Since 1995, logistics outsourcing has been growing steadily in France and Europe [8] and confirms its development among industrialists [9]. In this context, logistics service providers are only one illustration of the creation of added value to the operation of a company. Since the start of the outsourcing strategy, the logistics service provider has played a key role in the company's logistics activity, it is always looking for the right provider who will do the job properly and comply with standards. In a competitive environment, this value creation is a way for companies to differentiate themselves from the competition expand their markets, win new customers, and, above all, better meet the demands of customers seeking high-performance service offerings.

There is now a renewed interest in the provision of logistics services. The main reasons for this are based on the steady growth of the logistics services market and the vital importance of logistics service providers (LSPs) in supply chains [10]. Logistics services can be defined as a succession or combination of complementary activities that contribute to the creation of added value [11]. These activities may concern load breaking operations (reception and control of materials and goods, handling, storage, etc.), para-industrial operations (after-sales service and repairs, assembly, finishing, etc.), para-commercial operations (preparation of orders, constitution of promotional lots, sales forecasts, price marking, tracing-tracking, etc.), management operations (monitoring of expiry dates, return of pallets, stock management, etc.), consulting activities and transport operations (traction, chartering, purchase/negotiation of freight, etc.)

In the United States, an annual survey carried out since 1991 shows the growing impact of logistics services among manufacturers [12-13]. In France and in Europe, due to the increasing diversification of the services offered by the LSPs, logistics services are highly scalable [14]. On the side of the principals, logistics outsourcing has become an unavoidable strategic dimension with the implementation of new management rules, new skills and new social relations [10], the weight of contractualisation in the relationship [15], or providers' monitoring strategies [16].

While Logistics Service Providers (LSPs) have become key players in supply chain management. This chain is a system through which organizations deliver their goods and services to their customers. They form a network of interconnected organizations with a common purpose [17]. From the mid-1980s, many industrial or commercial companies disengaged from the operational realization of their logistics activities (transport, storage, etc.) which were not the core of their business. Thus, a new player emerged, the LSP. These operators therefore provide shippers (owners of the goods transported) with specific means of transport and storage, and this by expanding their service offer to other activities with higher added value, up to the operationalization and management of complex and personalized logistics and information systems. The speed and reliability of information exchange is crucial to coordinate, between the different actors in the supply chain, the precise time and place of services that guarantee the best results, and to provide the information that the manager needs to operate the system.

FULCONIS and PACHE [17] introduce this notion of service provider as an assembler of competence. Providers would no longer become mere executors in charge of ensuring the operational implementation of logistics activities, but "organizers (or pivots) of competence networks". This study by these two authors goes even further by shifting the centre of gravity of competence networks towards the service provider, all the more so if the degree of outsourcing is extensive and complex. The notion of LSP as a satellite is mentioned. Thus, the real drivers of the value chain would no longer be the industrialists, but the logistics providers, who would be at the heart of all the different "dynamic networks". In the extreme version of the phenomenon, it would no longer be a company that outsources its logistics, but the service provider that outsources other related activities such as production, marketing, etc. HESSE offers a different vision of the relationship between industrialists and logistics service providers. Indeed, for HESSE service providers are more like "coordinators and architects" within competitive strategies in industry-commerce relations [18]. Thus, contrary to what is developed by FULCONIS and PACHE [17], industrialists and service providers would not be against each other in a struggle for influence, but real partners with the aim of creating a definite competitive advantage towards other market companies.

The research in logistics and supply chain management is increasingly interested in issues related to practices in emerging markets [19] where few studies have been conducted. However, this research has largely overlooked the role played by LSPs, despite their role as facilitators of their clients' internationalization projects as the leading players in their target markets [20].

From this perspective, the article focuses first and foremost on the birth of the LSP. Using this perspective, we will then look at the strategic role of the LSP in the supply chain, which has been strengthened by the expansion of the range of logistics services that has encouraged the development of different categories of LSPs. Then in the third part, the exploitation of the result of the questionnaire answered by the interviewers through the empirical study carried out.

## 2 Evolution of logistics providers

Situated at the interface between production and the market, logistics service providers have quickly transformed themselves into true multi-service and multi-functional professionals in the context of a shift from industrial activities to service activities. The rise of these new players was first confirmed in the USA [21] and then returned to Europe. Their growth is due to their ability to develop technological innovations that make it possible to formulate solutions for the control and regulation of flows.

At the origin of this evolution are the new forms of organization of production/distribution which are manifested by new requirements. It is not limited to the classic need for a transport service, but now covers a wider range of conditions and services.

### *2.1 Traditional benefits: the change*

The traditional services offered by service providers to commercial and industrial enterprises can easily be seen when it comes to discussing the evolution of the main components of these services, i.e. time, tracking, frequency and shipment.

- **Delay:** Previously, delays were long, routing cycles were staggered, and arriving a few days before or after the delay did not cause any concern. Today, all cycles have become much shorter, whether they are innovation, product life or simply supply cycles. Undergoing the logic of just-in-time, lead times are not going to be simply short, but very short depending on the strategies.
- **Monitoring:** this is done only at times of traffic flow, while at other times the loss of information on the flow makes the possibility of monitoring out of reach. In the new approach, monitoring is done in real time. At any time, the sender can ask the service provider to modify the route, change the flow and modify the flow structure.
- **Frequency:** In the classical approach, the frequencies of the flows are low, spaced and irregular. With the development of industrial logistic strategies aimed at eliminating stocks, shipping frequencies are high and regular [22].
- **Shipments:** Classically, shipments were made in full loads resulting in massive flows. The size of the batches will undergo a drastic reduction, giving rise to repetitive and diffuse shipments in order to respond to

the logic of variety which becomes the competitive weapon of all the partners in the physical circulation.

### *2.2 New services: outsourcing*

With a preoccupation for improving performance and profitability, companies resorted to the direct appropriation of activities annexed to their principal activities. This approach, which propelled companies into business lines that they did not master, proved too costly. The option of using an outside companies to perform certain operations instead of doing it yourself is becoming a winning strategy for many companies. In defining this phenomenon, the literature most often tends to use the terms subcontracting and outsourcing as synonyms. On the other hand, we believe that these notions refer to two different relationships. Therefore, subcontracting is a very widespread activity that concerns all companies. It consists, for the principal, in entrusting outside companies with the task of carrying out certain tasks on his behalf, according to specifications, while retaining final economic responsibility for the subcontracted activity [23].

On the one hand, this relationship does not deal with situations where the principal subcontracts the entire production or services. On the other hand, it ignores situations in which the specifications of the principal are transmitted to the service provider without a real specification [24]. For its part, outsourcing represents a larger operation than conventional subcontracting, in that it consists of a service provider taking charge of one or more activities.

The choice of the client company to entrust all or part of its staff employed in the activity concerned, as well as the means of production associated with it, is secondary. In this relationship, the service provider retains a certain economic responsibility by becoming involved in an operating result (such as reducing inventory levels or improving customer service), which may have a direct effect on the remuneration system adopted. In addition, the outsourcing of logistics and other managerial operations is becoming more and more important as the advantages it brings to the shipper [25] are varied, namely: the reduction of logistics costs and the improvement of service quality by using a specialized service provider capable of achieving better productivity and reliability of operations instead of being paralyzed by inadequate means of its own, the shipper has a larger choice of service providers before it.

### *2.3 Logistics services: a new generation of stakeholders*

Before asking ourselves about the origins of these stakeholders, we should first define this new activity that the Anglo-Saxon literature [21] describes as Third-Party Logistics (TPL). In the past, a company, in order to organize its logistics, had to call upon a consulting company to program, a transport rental company to execute and its own means to control. Currently, a TPL offers these three aspects of logistics management in a single service. According to a study by the Eurosiris [26] on the French case, logistics service providers have three main origins, the most important of which is the transport sector.

- **Providers from the transport sector:** The majority of providers from the transport sector come from the road transport industry.
- **Service providers from large manufacturing groups:** This type of service provider is made up of subsidiaries of companies with a high level of activity and which generate a large volume of flows, upstream (supply of materials and components) as well as downstream (delivery of finished products). It should be noted that the option of making a logistics service provider a subsidiary has tended to recede, giving way to the contractual route (subcontracting, partnership).
- **Providers of services to industry:** This category includes all the companies specializing in the execution of certain transactions for the benefit of industry. These operations, known as annexes, are often logistical in nature (industrial packaging, warehousing, etc.) [26].

### *2.4 The offering system of logistics service providers:*

The supply system implemented by logistics service providers brings, especially in the field of physical distribution, a new concept of flow control. It is no longer a service that is assessed solely by its cost, but a systemically integrated and structurally multifaceted service capable of adding value to the cargo handled. However, setting up such a service requires a major logistical infrastructure that can only be provided by large companies.

The small company (often transport), for its part, will limit itself to a single-product offer, which consists of providing traction by subcontracting its service to logistics providers who require a high degree of professionalism and a significant capacity for expertise. This is how logistics service providers are going to focus on nodes (nodal points) to develop integrated and varied services capable of generating greater added value. "Traction activities thus form part of a larger set of physical distribution operations carried out, for the most part, on freight handling infrastructures such as warehouses and platforms" [26]. The latter have now become the target of investment by carriers wishing to offer logistics services. The rise of logistics service providers with their new offering system has contributed to a reconfiguration of the relationships between physical distribution partners.

First of all, it contributed to the decline in the dominant corporeal (or patrimonial) option until the 1970s by replacing it with the contractual option (subcontracting, partnership), which is not based on one-off transactions but on long-term transactions. It then changed the mechanism of market behaviour.

## 3 Methodology

Regarding the offer of logistics services of Moroccan companies, we designed a field study with a questionnaire (realized in the period between September 2019 and February 2020) for service providers, this empirical analysis is based on a database that includes targeted observations on 64 service providers. The table 1 presents the providers in different sectors of activity:

- Maritime, road, air transport,
- Shipping service,
- Storage & handling,
- Supply Chain Audit & Consulting.

*Table 1 The sample targeted by the questionnaire of logistics service providers*

| Sector | Type | Sample size |
|---|---|---|
| Maritime transport | Large companies | 10 |
| Road transport | Large companies | 21 |
| | Small and medium companies | 2 |
| Air transport | Large companies | 5 |
| Rail transport | Large companies | 1 |
| Shipping service | Large companies | 7 |
| Storage & handling | Large companies | 14 |
| Audit & consulting in SCM | Large companies | 4 |

The purpose of this study is to determine the activity of logistics service providers in Morocco. In addition, we would like to know the different types of services offered by service providers, and the logistics activities most outsourced by the principals as well as other information, which we will develop further in what follows.

## 4 Use of the questionnaire and interpretation of the results:

Figure 1 describes the types of companies currently in Morocco, it should be noted that 62% of the responses to the questionnaire for logistics service providers came from international companies located here in Morocco, while 38% came from Moroccan companies.

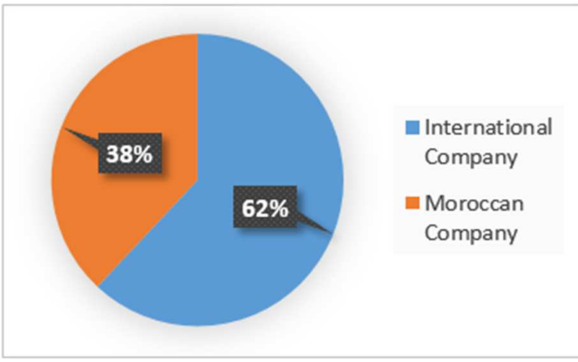


*Figure 1 Distribution of providers surveyed by nationality*

On the other hand, in figure 2, we note that the majority of the clients of these service providers are industrialists with a percentage of 54% compared to 36% for the mass distribution sector. The 10% refers to different clients, for example: the media, car rental agencies, etc.

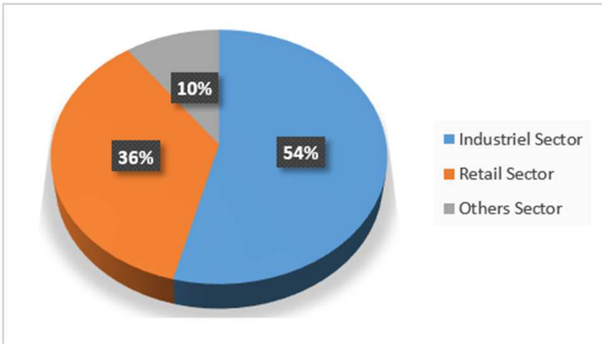


*Figure 2 Distribution of the clients of the providers surveyed*

As shown in the figure 3, the Distribution or downstream transport (88,23%) and warehousing (85%) are the two most proposed logistics services on the Moroccan market, the percentage of upstream transport is in third position with (64,7%), after comes the transit and customs clearance with the percentage (55,88%), labelling with (41,17%), packaging with (35,29%), however we note that IT solutions is low with a rate of 23.53%. The other unexplained services with a rate of 32.35% are: weighing, stuffing and stripping of containers, shipping service, etc.

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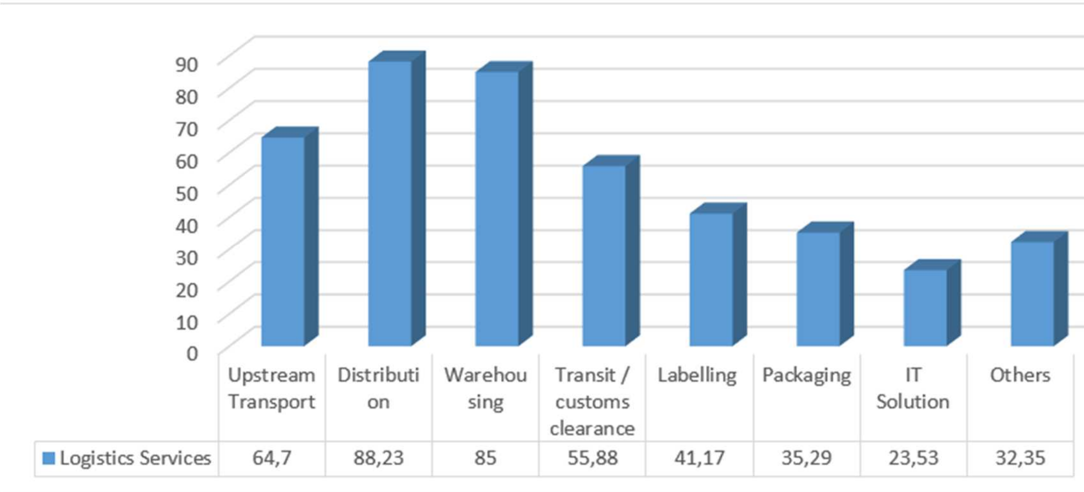


*Figure 3 Existing logistics services on the Moroccan market*

Figure 4 demonstrates that the majority of logistics service providers in Morocco claim to have direct contact with their clients' customers with a rate of 68%. While the remaining 32% have no relationship with them at all what may explain why Moroccan companies are conservative about entrusting their logistics activities to a third party is the fear of losing direct contact with their customers.

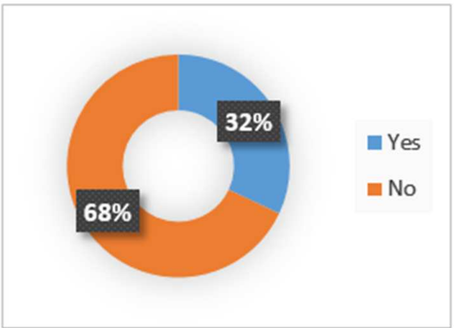


*Figure 4 The direct contact between the logistics service provider and their customer's client*

The figure 5 present the percentage of re-internalization of logistics activities, it should be noted that 65% of service providers have had no experience of re-internalization of logistics activities by their customers, because they have considered themselves satisfied with their partnership. So, let the 35% claim to have gone through such a situation.

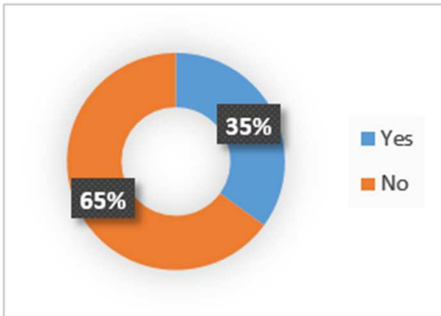


*Figure 5 Percentage of re-internalization of logistics activities by the providers' customers.*

Concerning the question for the causes of the re-internalization of outsourced activities according to the providers, the answer was for the following causes:

Cause 1- Customer's claim of a better control of the flows on his part.

Cause 2- Global strategic decision of outsourcing companies.

Cause 3- Failure of the service

Cause 4- Expensive logistics services.

Cause 5- Loss of market share by the customer.

The figure 6 below is a representative graph of the percentages of the results:

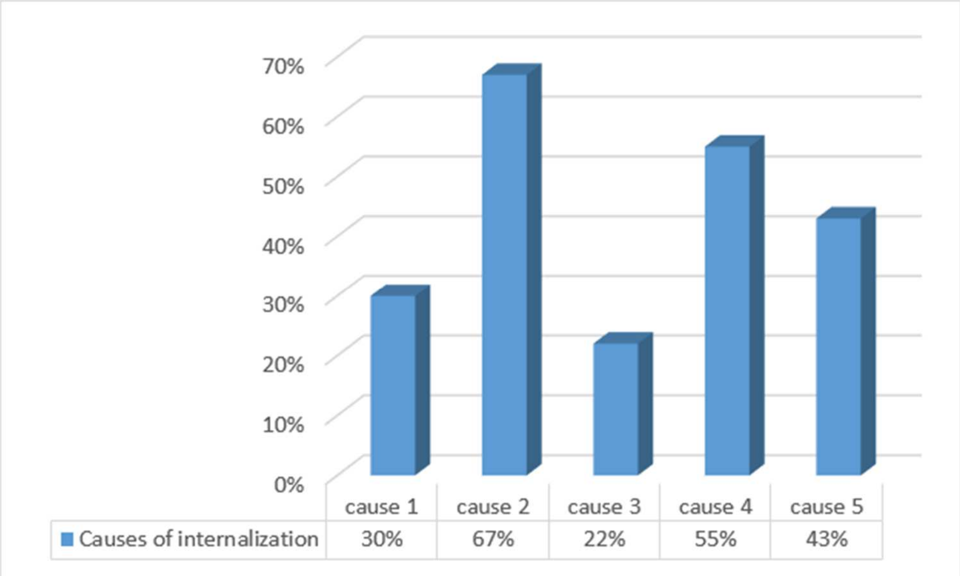


*Figure 6 Causes of the re-internalization of outsourced activities according to the providers*

## 5 Discussion

A database containing information on Moroccan logistics providers service has been used, the supply of logistics services is low and not very diversified in Morocco, and there are few companies offering a wide range of logistics services. However, companies offering a full range of logistics services are exclusively subsidiaries of European groups and most often have multinational companies as their customers.

Using information from several sources, we found that industrial and commercial companies in general prefer to internalize logistics activities, it is in this sense that the paradox of collaborating or coordinating with a provider where the question arises. Therefore, only some companies outsource the part relating to transport and storage. The internalization of logistics is due to the mistrust of these operators to entrust internal information concerning their business to third parties. While the transport and storage represent a substantial part of the market for logistics service providers. Unfortunately, the level of services offered is of relatively low quality and they are subject to technical conditions that are below standard.

Logistics subcontracting of the TPL type (Third part logistics: storage, stock management, order preparation, organization of physical distribution and information and value-added services) are mainly provided by foreign companies or companies oriented towards international trade, while the offers of Moroccan companies are focused on transport or simple storage.

Red tape and competition from the informal sector in road transport and warehousing make it difficult to develop the formal sector and meet high quality standards. Finally, information systems are poorly developed for the real needs of the supply chain. Certainly, the behaviour of Moroccan companies with regard to logistics is a function of their size, their fields of activity and the degree of competition. Large companies and those with externally oriented activities have started to broaden the scope of their logistics strategies (outsourcing, Logistics Information Systems, etc.).

In logistics services, Moroccan companies initially focused on the marketing of more or less complex transport services. However, the SDTM and La Voie Express have become real logistics integrators and have customers who are mostly Moroccan. They rely on warehouses in the main provincial cities where the grouping can be carried out. Marotrans is the only company that has made transport quality a priority. It has the exclusivity of road transport in Morocco for many foreign companies such as McDonald's, Cofarma, Carnaud, the transport of milk for Nestlé.

Logistics demand from Moroccan companies (especially SMEs) remains low. Generally, the only outsourcing done by Moroccan companies is for transport and storage. In addition, Moroccan logistics providers focus largely on transport.

The logistics and transport service market there is dominated by a majority of European service providers [27] such as Géodis, DHL, Kühne & Nagel, Dacsher where the majority of LSP are Small and Medium Enterprises (SMEs) specialized mainly in transportation services [27]. On the other hand, according to the Moroccan agency for the development of logistics [28], despite the difficulties related to the international economic situation. The market for logistics services and road transport of goods in Morocco has experienced an average annual growth of 5.2% between 2010 and 2016. The volume of activities and investments of companies in the sector is clearly evolving in Morocco encouraging the development of LSP.

## 6 Conclusion

This study thus aims to analyse how the LSP develops managerial capacities in order to develop in its market. Over the last decade, Morocco has embarked on a national logistics development strategy through several infrastructure development projects and multi-flow logistics platforms.

The purpose of this paper was to review the existing logistics service providers in Morocco, their practices as well as the most outsourced services. This field survey allowed us to synthesize the Moroccan market through a questionnaire and the analysis of various articles and reviews dealing with this issue. Due the gradual opening of borders and the massive arrival of foreign competition, Moroccan companies find themselves in two situations. Some companies have understood that the use of logistics service providers could be a lever for improving performance, but also a way to focus on areas of differentiation from competitors, and others hesitate to outsource their logistics activities because internal resistance or apprehension about the involvement of an external supplier in the company's activities. This work is divided into three parts. First, we have explained the principles of logistics outsourcing in emerging countries. Then, we have described the evolution of logistics service providers over time. Finally, we have presented our research approach and our results in the Moroccan market.

In this regard, several perspectives may emerge from our research and several questions deserve to be pursued and elucidated by future research. For example, research will be needed for the selection and evaluation of the choice of the appropriate logistics service provider for the principals.

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