

THE HISTORY

The logo for the brand 'STILL' is positioned at the bottom center of the page. It features a stylized, outlined 'S' followed by the word 'TILL' in a similar outlined font. Above the 'S' is a small, tilted rectangular shape, possibly representing a roof or a specific architectural element. The entire logo is rendered in a light gray, outlined style.

STILL



ESTILL

A CORPORATE HISTORY WITH A FUTURE

We present the STILL history, to shed a light on the development lines of our company. These lines of development have guided STILL from its foundation to being the leading group of companies providing intralogistics solutions worldwide. Without a core of consistent values and firm beliefs, carried by employees, suppliers and customers for more than ninety years, the company could not be in the position it is in today. Based on these values, we look into the future.

The STILL corporate philosophy underlines the common effort as our special strength. Understanding ourselves as partners, is the basis of our customer-oriented behaviour and coins our internal cooperation.

More than ever, we are asked to develop services and products for our customers and their regional requirements. The network of the KION Group provides us with a sound basis for this. The future belongs to suppliers of holistic solutions. This is why we combine excellent trucks with services and software solutions. Our customers can integrate seamlessly into their own value adding chain and into their logistic processes.

Transparency and efficiency are becoming the essential success factors. This also applies to the way our company presents itself to others. Only companies that offer visible opportunities for development and career, nationally and internationally, will remain successful in the competition for future talents.

The future belongs to those who remain true to themselves – yet at the same time flexible enough to be able to react to new developments on the markets. STILL belongs to this kind of company making use of its sound core of internal values and convictions, re-inventing itself again and again, yet remaining an unmistakable and dependable partner for its customers. This is why we are looking forward to a common future with you!

STILL Management Board


Bert-Jan Knoef


Thomas A. Fischer


Goran Mihajlovic


Dr. Thomas Toepfer

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01 / **THE FLOW OF MATERIAL
AND INFORMATION
DRIVES INNOVATIONS**



HANS STILL – FOUNDER AND VISIONARY

“Nothing is stronger than an idea whose time has come.” Victor Hugo



Europe 1920. The continent is slowly recovering from the sufferings of the First World War. It is a time of economic ups and downs causing substantial social turbulences. In Germany the plants of Krupp deliver the first steam train engine of their own design and development – it is a heavy freight train engine. All across Europe transport capacities are geared up and freight traffic is continually growing. Mobility and acceleration coin the spirit of daily life. In Hamburg the subway trains

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are electrified. Electrification in general is becoming a synonym for the increasing mobility and

dynamics of the developing industrial nation of Germany. The leisure activities of the German people are picking up speed as well: in Berlin the first Jazz record is published, a version of the “Tiger Rag”. Jazz and the popular “Shimmy” dance electrify the people in these years.



The face of the City of Hamburg is fundamentally changed during the twenties of the past century: The architect Fritz Schumacher builds his urban visions and his brick buildings become a brand label of the city. His contemporary architect Fritz Höger builds the Chilehaus with a facade resembling the hull of a massive ship; a building that soon becomes a prominent symbol for the commercial spirit of the times. In the second half of the twenties the most important

commercial area of the city, the port of Hamburg, can return to the successes it had achieved at the turn of the century. In 1923, HAPAG puts its new 20 000 GRT flagship “Albert Ballin” to service. The motto

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of the company that can look back over a long tradition is: “My field is the world”. It is the starting point of a strategic expansion making overseas shipping a motor of economic growth.

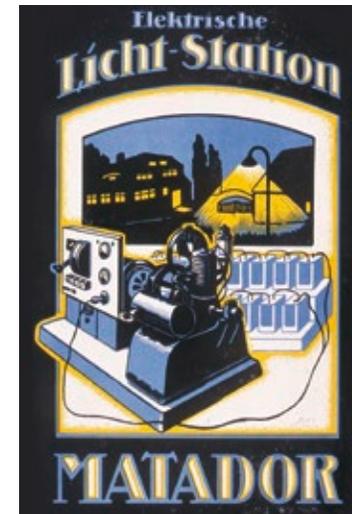
The rapid mechanisation of production and transport and the ever complex flux of goods accelerate economics and making logistics a success factor for the first time in history. Mobility, speed, dependability and service-orientation become the competitive advantages in a seemingly ever prospering global economy.

Speed counts and “time is money”. For example in repairing the growing number of electric devices that move all the goods to where they were needed. This is what an expert in electrics recognises at the young age of 22. Consequently he starts his own business by opening a repair workshop for electric motors. With only two employees Hans Still starts his company in the Spaldingstraße in Hamburg. Right from the start he has a keen sense for the demands of the companies of his time, predominantly medium-sized companies. Only a year after

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establishing his company he starts to develop his own products based on the insights he gained from the demands and requirements of his

customers only a year after establishing his company. He recognises the increasing demand in mobile electricity supply and hits the nail on the head with his light generator “Lichtstation Matador”. Later on small, portable generators that produce electricity wherever it is needed are to follow. The power grids of the time were wide-meshed and unreliable; in Germany as well as on the international markets. So, for example, remote plantations in tropical countries needed



independent power generation systems. STILL delivers them to all corners of the world. In this way the young company can grow with the increasing demand of its customers for mobile projects and services. The dynamic development of his company in the first years after its foundations is also reflected by the number of people it employs: In 1924, it already employed 20 staff, ten years later 500, and another decade after that there are already 1 000

“STILLians”. One of the reasons for the sales successes is that Hans Still had soon realised the importance of advertising, an aspect we nowadays refer to as product and corporate communication. While the first ads still bear the slogan “Fast help – repair of electric motors” his first success-product, the light generator “Matador”, already attracts the customers’ attention by its fashionable “Art Déco” style design. Also in direct communication with large customers and purchasers of industrial companies Hans Still spares neither costs nor effort. Already in 1924, Hans Still celebrates his debut with his products at the trade show in Leipzig. This appearance had only been made possible by great efforts made by the young entrepreneur and his extraordinary organisational strength. However, success proved him right. From now on he pursued every chance to increase his prominence and to anchor the core competencies of his still young company in the public mind. This has made Hans Still one of the few inventors who successfully developed their own advertising strategies themselves.

A glance at the background of founders and inventors of his times discovers the values and strategies that were the key factors for Hans Still: He was able to merge the two predominant phenomena of the



time “electrification” and “mobility”. He achieved this in a visionary way by developing compact, user-friendly, highly mobile products that made electric energy instantly available wherever it was needed. The success of the light generator “Matador” turns into a symbol for

Already in 1924, Hans Still celebrates his debut with his products at the trade show in Leipzig.

an economic upturn with a growing demand for energy, just as the electric carts did in the years to come. They were electric vehicles with an independent power supply suitable for very different applications. Until today, nearly all of the hospitals in Hamburg fall back on emergency power generators made by STILL. In all these developments Hans Still assigns quality and endurance of his products top priority. “It may well happen that someone else is cheaper or delivers something cheaper, but it must never happen that someone else delivers anything better,” was his credo.

MOBILITY AND ELECTRIFICATION

“Larger, faster, higher” – dynamisation is all around at the time. On 19th of January 1932 the German railway “Deutsche Reichsbahn” runs a test journey of a new, a new, fast “railcar: The flying” railcar “Fliegende Hamburger” travels the 286 kilometres from Lehrte station in Berlin to the main station in Hamburg in only 142 minutes! It will take 65 years until an ICE train of the Deutschen Bundesbahn is to travel the same route in the same time again. The railcar is a blueprint for later streamliners. Its new diesel-electric drive propels the vehicle at a speed of 160 kilometres per hour. Two years after that Dornier will take off the Dornier Do X, the largest aeroplane of its time, for its virgin flight – marking the beginning of modern air freight transport logistics. It is the background of such milestones in transport of goods and materials

Initially, Hans Still continues to concentrate on elaborating his range of mobile power generators, by then available with capacities of up to 10kW.

against which Hans Still works to expand his company. Initially he continues to concentrate on elaborating his range of mobile power generators, by the time

available with capacities of up to 10kW, in order to quench the growing thirst for energy of production and transport systems. From 1935 on, these mobile systems became a fixed part of the product range.

VIVID CORPORATE PHILOSOPHY

Besides these technical innovations for his product range, the founder of the company starts around 1935 to attend aspects of the corporate culture and the benefits of his rapidly growing workforce. What we call “psycho-social network” of a brand today, met a Zeitgeist unifying the positive and negative aspects of this kind of approach at the time. 1934 sees the first institutionalised company outings and a few years later the first company sports teams emerge – which are still around at STILL today, by the way. Already one year later a suggestion scheme is established in the young company. A medical service and a works doctor had already become a STILL standard while many comparable

companies still were a long way from such social achievements. In 1940, the founder of the company established a corporate aid organisation for “STILLians” in need: the “Nothilfe Hans Still e.V.”; a corporate unit which also still exists today. The works library, inaugurated a year later, aims to improve training and information of his employees. The first affordable company flats were let to their residents in 1943.

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Admittedly, with these and other initiatives, Hans Still was in line with the tradition of paternalistic entrepreneurs of the 19th century, but he also sees the competitive advantage innate in employees

loyal to the strongly expanding company. However, Hans Still’s thinking and doing is also neighboured by the flux of the time which is soon to fundamentally re-coin the image of Germany in the world with a long lasting impact.

ENTREPRENEURS IN ECONOMICS OF WAR

In the early forties the entrepreneurial dynamics of Hans Still had developed in the context of tendencies that started to reinterpret values such as “community spirit” or “solidarity” in the sense of a nationalistic philosophy preparing the ground for the upcoming National Socialism. Viewed from this perspective, his initiatives of company sports teams, work outings and a company aid organisation also were messages of political powers moving in completely different directions. While this as such does not make the initiatives suspicious, the entrepreneur Hans Still was, however, also influenced by the uprising National Socialism. This was augmented by the fact that STILL was increasingly developing military products. Amongst other, the company produced search lights for anti-aircraft guns and was therefore categorised as vital for the war. Hans Still became a member of the NS organisation and later on took office as leader of defence economy. Early 1945, the staff of STILL had grown to nearly 1,500 employees. This

had made STILL an important actor in military and war economy. The capacities are constantly expanded and this way the production output was tripled since the beginning of the forties.

By 1942, more and more companies were threatened by a massive lack of workforce – besides the bomb attacks. Virtually all men fit for military service were drafted by the army and the German war economics had to draw back on forced labourers who had been deported from abroad. By the end of 1944, approximately 7.5 million people were forced to work in German production facilities – corresponding to nearly

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20% of all employees. Despite the little documentation still available, a research conducted by Linde AG In 2004, had found that up to 30

forced labourers have temporarily worked at STILL. They came from Belgium, France, Greece, Holland, Italy, Yugoslavia, Croatia, Latvia, Czechoslovakia and Ukraine. On the initiative of the Chair of the Board Reitzle, Linde AG made compensation payments, also on behalf of STILL, to the German Federal Fund for Nazi Victims.

DYNAMIC DEVELOPMENT OF LOGISTICS DURING THE “WIRTSCHAFTWUNDER”

The break down of Germany at the end of World War II marked the “zero hour” for a great number of companies including STILL. About half of the production facilities in Hamburg had been destroyed during the war. The staff now reduced to a total of only 500 employees began with the reconstruction. Initially the company restarted its operation by returning to its roots and repaired electric motors and transformers. However, neither the experience nor the knowledge of the innovations and the products had been lost. And, the development of electric devices was further fed by the ever-present lack of fuel.

This is how the combination of electro-technical know-how and a clear vision for the current demands of the market led to the first success product in the years after the war: Early 1946, a development team founded by Hans Still presented the electric cart EK 2000, an electrically powered transporter with a load capacity of 2 tons.

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Resilient, agile and independent from expensive fossil fuels this truck became a turning point in the strategic alignment of the company after the war. From now on STILL focussed on mobility aiming at “industrial trucks”. The production of pure power generators faded into the background and was phased out completely in 1969.

Developing the electric cart had been the first incident for STILL to combine its skills in electric drives, mobility and transport. This lay the cornerstone of the success that exists right into present times. More and more new technical ideas characterised the electric platform and other industrial trucks of the times. For example, the new independent wheel suspension and stick steering. Both of these innovations were registered for patent – another eminent characteristic of STILL until today. Currently, STILL holds approximately 2,000 patents for technical developments. The fact that STILL correctly assessed and met the demand of potential large customers is reflected by an order placed by the Deutsche Bundesbahn: in 1947, the German railway ordered a large number of the EK 2000 electric platform trucks.

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Until today the successors of this classic platform truck characterise the transport of goods on German and European railway platforms.

From here it is only a small step to the next success product; A three-wheel tractor, the “Muli Mobil” which is soon to coin the image of industrial operations and warehouses in the young Federal Republic.



STAFF ORIENTATION

For Hans Still his employees play an active role in designing the future of his company. Right from the beginning he continuously discussed and tested solutions in dialogue with his colleagues in order to develop ideas and visions for innovative products. These teams are the start of a long row of employees, whose talent and inventor spirit had had not only been recognised early by Still, but whose own initiative he consistently promoted. A part of this tradition, which remains in place at STILL until today was also Dr. Friedrich Jungheinrich who was at

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first director of work preparation developing the tools for the production. In 1941, he took the post of director of fixture construction and standardisation. Later on he

was to provide important impulses as product developer for the company. The fact that he became a co-founder of one of the most important competitors later on is received by Hans Still in the interest of progress: “Competition is good for the business”. Later on, other

development directors played similarly important roles – far beyond the era of the founder.

The most important delivery of this development team is the first forklift truck made by STILL in 1949. The EGS 1000 marks the beginning of the core competence from STILL until today: The art of engineering developing user-friendly products to exactly match the logistics demands of the market.

SERVICE TEAM

Innovative, mobile products are one side of the coin. The other side is a dependable and fast customer service, and both together create long term customer loyalty. Knowing this interplay between the two, Hans Still complemented his trucks with a tailored service offer tailored to the needs of his customers. Using the catchword “Instant Help” he signaled to his customers already in the advertisements that he is not going to let them down in case problems arise. Beyond this, he would advise his customers with respect to logistics, telling them how to integrate his products best into the organisation of their operation. Hans Still knew right from the start that service staff cover a lot of mileage on the road and that the service technicians are ideal mobile ambassadors of the STILL brand. Already at the end of the 1940s, he took

Already at the end of the 1940ies, Hans Still takes the initiative to use Volkswagen transporters “micro vans” bearing a STILL design to serve this purpose.

the initiative to use Volkswagen transporters “micro vans” bearing a STILL design to serve this purpose. The uniform clothing of the service technicians in the

colours of the company ensures the necessary recognition value. The service reports which the technicians prepare after their visits generate important impulses for the development of new products and services. After all, who would know more about what the customers wanted than the service technicians who saw virtually all the processes at the customer’s? If today the sales and service teams at STILL are in

continuous dialogue via the cooperation platform “PartnerShip”, this is not only due to a sales concept that is evermore oriented towards ever faster changing customer demands. Much rather, the “PartnerShip” principal shows how the holistic view, the harmonisation of product quality, consultation competencies and service together have been coining the STILL brand until today. This still holds true until to date for the appearance of the service team which is in line with the appearance of the brand as such; also if the forklift truck model on the roof of the service vans, which had virtually become a cult symbol in the eighties, has recently been removed to pay respect to the aerodynamics and the fuel consumption of the service vans. The importance of the service technicians being indispensable ambassadors of the brand remains to be one of the strongest pillars in the communication of the brand.

GLOBAL INNOVATION DYNAMICS

Independent of the product types, one of the maxims of STILL is and will be to keep track of the future requirements of companies with global activities. This means to align the perspective of the product development with long-term, global demands and development trends. The close link between transport and logistics tasks paralleled by a global flow of information reflects the general development of civilisation. Companies wanting to stay at eye-level with their customers must consider these phenomena and trends in their product development. Knowing the global challenges for logistics in the future as exactly as possible is a condition for future entrepreneurial successes.

The changes that international transport is undergoing become particularly evident in Hamburg – directly in front to the works gates of STILL: Namely in the development of the port of Hamburg over the past forty years. In 1958, the American ship owner Malcolm McLean is the first to use containers as load carriers – initially only on the east coast of the USA. However, since that time this innovation allowed to standardise

international transport. A development that is soon to affect European ports as well: In the sixties the damages caused during the war had just been repaired in the port of Hamburg to allow frictionless turnover and warehousing in the port again. Now, at the beginning of the sixties the whole port had to be reorganised and rebuilt to fit the new requirements. Container traffic rolled across Europe and the traditional quayside systems were no longer suitable to cope with the new technologies. Huge investments were necessary to develop the high-performing

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container port that we know Hamburg of today. State-of-the-art transport technology – also provided by STILL – keeps this complex entity moving; 24 hours every day. When the “World Wide Web”, initially intended to link American universities at the end of the seventies, started to spread around the world in the eighties, it became possible to link the flow of materials in real time with the related flow of information. On-line access and control of all data relevant for a company and its partners connected with the related movements of materials, as it is common place to us, is soon perceived as a challenge by STILL. And so the company can set out early to create powerful instruments to connect

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the two levels – transport of materials and information – and to make this connection transparent in real time. Today, STILL offers a platform-independent material flow management system with an independent infrastructure. This is a system that meets the increasing demand for transparency in all internal logistics movements making the data available at all times.

All forecasts point out that we are globally at the transition to becoming “post industrial society”. Development and production are often established far apart in different regions on the globe. A “knowledge society” is opposed to countries and regions that are the “workshops of

the world” moving to wherever the production costs are lowest. Related to STILL, this means that the future winners will be those companies offering products and services that provide intelligent solutions to the ever more complex logistic requirements of globally active customers against the background of increasing energy costs and consumption of resources. There is a growing trend toward technologies that find a balance between economics and ecology. This is an issue that is becoming more and more relevant in terms of competition. Especially in the upcoming economies of the formerly developing countries the speed for the demand for products and services that offer an “additional” ecologic value is rapidly increasing.

The much quoted maxim “think global – act local” is the guideline STILL follows when it comes to the global alignment of future core competencies. Because, together with the global scope of the offer, the number of smaller, local markets is growing as well; and the demands of these markets considerably deviates from the global “mainstream”, for example, with respect to “sustainability” and “ecologic responsibility” of the products and services offered. Experience has shown: if countries or their economies initially pay little attention to the ecologic relevance of logistics products, then this issue realises an important competitive



edge in the second step of a developing economy. Sustainability and eco-friendliness will be essential in the future. A “Green Economy” as an attempt to build a strong bridge between ecology and economy will be the most prominent future subject. STILL is taking this into account by developing energy saving technologies such as “Blue-Q”, the intelligent auto pilot for economy and ecologic responsibility. Pressing a button activates the efficiency mode of a truck which then saves energy wherever it does not jeopardise the current work in progress.

In this area STILL can look back upon a long history of experience with electric drives and the respective eco-friendly propulsion technologies. On this basis STILL has the capability to become an innovation driver. In this sense the serial hybrid drive of the RX 70 presented in 2011 is the top of the wave of developments focussing on energy efficient drive technologies. In addition this product is development based on generic STILL products. With its diesel-electric forklift trucks STILL had already met all the important conditions to develop the future-oriented hybrid drive in the fifties. To develop the hybrid drive, the only missing link was a buffer to store the energy flowing between the two drive systems. STILL presented the first truck with hybrid technology:

The R 70 was the predecessor of today’s RX 70 Hybrid which is now produced in series and helps maintain the ecologic balance in the container port of Hamburg. However, the development is continuing: The fuel cell as a propulsion module for the future will open the next page of the book of this success story.

FUTURE PRODUCTS

Learning from innovations built into prototypes and step-by-step transfer of technological details from these innovations to new STILL trucks has been the pivoting point of the innovation strategy at STILL right from the beginning of the company. By this method the competency

The serial hybrid drive of the RX 70 presented in 2011 is the top of the wave of developments focussing on energy efficient drive technologies.

in electric generators (“Matador”) was combined with developments in propulsion technology used in electric carts (EK 2000): a product which was in turn combined

with hydraulic elements to lead to the development of the first counter-balance truck (EGS 1000). The strategy of step-by-step combination of technological aspects in product development is also reflected in the realm of world innovations and innovations of the industry. Many of which had initially been integrated in prototypes or reference products and that have later become standards for the complete industry. This applies to the electronic diagnostic system launched in 1970 and that is used by STILL service technicians, the free-view mast launched in 1977, the lateral battery change as well as the first hybrid truck worldwide built by STILL in 1983, or the “Joystick” which was introduced by STILL in 1999 and that has become a standard for the industry by now. Against this background it was only consistent to present a concept vehicle, the RXX, in 1998. The egg-shaped design of the truck as well as its internal values in terms of technological features caused a great stir in the public. The strategic decision to invest the considerable sum of money into such a concept vehicle does not only pay off when individual features are taken over into subsequent product innovations



based on them. It would also be difficult to obtain the public perception of STILL as a premium supplier with a claim to technological leadership without the RXX. The latest development in this respect is the design study cubeXX intending no less than the fusion of a counterbalance truck, a low lift and high lift pallet truck, an order picker and a double

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deck pallet truck in one single vehicle. It is a merger of independent machines each of which have until now existed in its own universe with independent product and brand histories. The

vision of this central idea “6 in 1” is to develop an intelligent cube floating noiselessly in the warehouses, as an entity executing as many functions as possible in a controlling network. This design study is driven by the strategy to take future scenarios and forecasts as a basis to infer the requirements of every day work and value adding chains in the future and to develop flexible machines and services fit to meet these demands. Put in the shell of a nut one could say: “To learn from the future for the future.”

SOLUTION DESIGN

The requirements with respect to sustainability and environmental compatibility for industrial and logistics companies are increasing. More and more customers ask their suppliers for eco-balanced products and services. This is how this issue is becoming an essential competitive factor. The task for the future is therefore to bear these demands for sustainability in mind when developing products and performances, integrating these products into ecologic visions and fitting them into the framework conditions that result from urbanisation and the development of the population. Customers and suppliers alike are subject to these unstoppable developments. This is why the future does not belong to products or services creating an independent segment for themselves, but to those products and services that think outside of the box integrating adjacent areas. Looking at the

tradition of STILL we have seen many incidents of this way of “linked thinking”. Another example of the solution-oriented development policy at STILL is the constant work on the question how energy can be efficiently stored in mobile machines with an economically and ecologically reasonable effort. This applies to propulsion technologies just as well as to the question of how electric motors can be supplied with power from lighter but at the same time more powerful batteries. In the past batteries were heavy enough to serve as counterweights in the trucks, their major setback, however, were

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the long charging cycles. The new types of lithium-ion batteries are not only much lighter than conventional energy storage devices; they will also not

discharge while not in use. STILL is consistently developing ways to deploy these efficient energy storage types, which unfold all their great potential the more challenging the task is.

However, STILL is taking another step towards the goal of independent energy supply to its trucks. By installing a fuel cell in the trucks, the machines equipped this way take their own power plant on board. The electric energy for driving, hydraulic functions and attachments is generated by a reaction of hydrogen and oxygen from the air. The

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“exhaust” emissions are pure water in the form of vapour. In all of this the space required for all the components of the fuel cell is no

larger than the space required for a conventional battery. So once again, trucks from STILL with fuel cells are another instance to underline the credo of the company: to work solution-oriented and to show its customers efficient, future-oriented ways to achieve their corporate goals.





02

**SUCCESS FACTOR
PROPULSION
TECHNOLOGY**

ELECTRO-MAGNETIC DRIVE SYSTEMS – A CORNERSTONE FOR STILL

“The electro-magnetic principle invented by Siemens and the internal combustion engines from Otto and Diesel have had more impact on the world than the theories by Marx and Lenin.” Eberhard von Kuenheim, former Chair of the Board of BMW

Asking operators at our customers’ or service technicians about the most prominent benefits of electric drives the answer usually is the same: Compared to internal combustion engines, electric motors consist of much fewer parts and are therefore less costly and easier to maintain. An additional benefit is that they do not emit

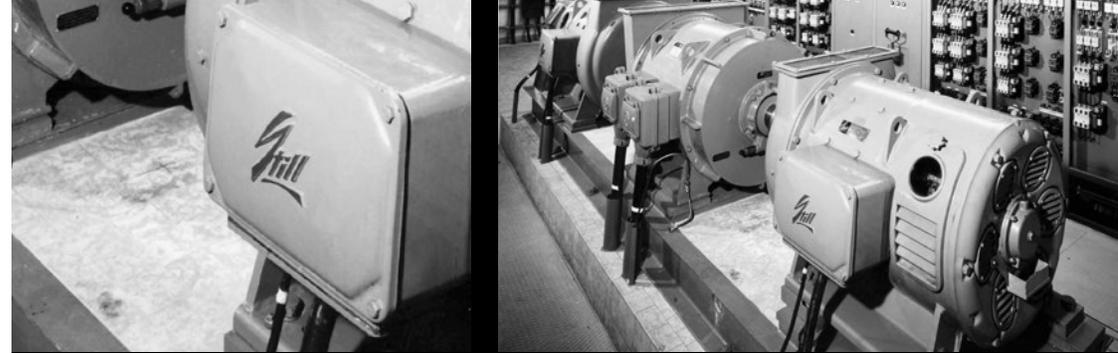
Compared to internal combustion engines, electric motors consist of much fewer parts and are therefore less costly and easier to maintain.

any exhaust fumes in operation which makes them very environmentally friendly. (Ever more so if powered by “green” electricity.) The high efficiency

of electric drives is colloquially referred to as “powerful”, and the low noise levels are a great benefit when operating indoors.

It was therefore not in vain that the beginnings, from where the company developed to what we know of STILL today, was a repair shop for electric motors which subsequently had produced generators. Electric motors – be they powered by direct or alternating current – transform electric energy into mechanic energy by means of a rotational movement. They are the exact counterpart of generators.

Hans Still knew both sides of this “generator – motor” principal. And therefore equipping the first transport vehicles with electric motors paved the entrance to a development leading directly to the techno-



logically sophisticated STILL products with electrically powered drives available at present. Electric motors operate without couplings and gearboxes which is a fact that provides excellent driving comfort. Compared to internal combustion engines they are also characterised by low operation costs. Energy costs are lower as well as maintenance costs and their service life is longer. From his discussions with service customers Hans Still knew the weaknesses of the existing machines

From his discussions with service customers Hans Still knew the weaknesses of the existing machines in every day work.

in every day work. The compact and resilient design of the initial product developments by STILL were the result of experiences customers had had at the start of

the company. Asked about decision criteria for purchasing warehouse trucks, industrial customers still name a compact, resilient design as most important.

DEVELOPMENT LINES OF ELECTRIC TRUCKS AT STILL

The electric cart “EK 2000”, a resilient electrically powered transporter with a load capacity of 2 tons and the subsequent three-wheel tractor “Muli Mobil” mark the change of STILL to become a maker of “industrial trucks”. In the warehouses of the port of Hamburg the Muli Mobil is soon to become an indispensable helper for the dockworkers at the time. The agile electric truck can tow up to ten trailers and exactly this feature makes it an early predecessor of STILL’s tugger train of today.

The development step from a three-wheel tractor to the first forklift truck them seems small at first sight. However, forklift trucks were virtually unheard of in Europe of the mid-fifties – at least if they were to come from domestic production. The forklift truck market in Europe was initiated in 1946. At the time, the American occupying forces started selling forklift trucks from army stocks to German companies. Most of these models were made by Clark. The American screw-maker

Eugen Clark had started to build platform trucks with internal combustion engines in 1917. On this basis he had developed a lift truck which he had called “Truclift” in 1922. This truck in turn became the basis to build the first proper forklift truck in 1924. The company Clark has been making forklift trucks until today.

Against this background the company STILL soon perceives a growing demand for transport machines that do not only tow but that also lift loads. In 1949 this triggers the development of the EGS 1000, the

Against this background the company STILL soon perceives a growing demand for transport machines that do not only tow but that can also lift loads. In 1949 this triggers the development of the EGS 1000, the first forklift truck.

first forklift truck. Although this gives STILL a crucial head start, the company is not alone in the new market place. Also the Maschinenfabrik Esslingen – a company that will play a major role for STILL in the future and

Steinbock start to position themselves on the market. The competitor from Hamburg, Jungheinrich, whose junior founder received important impulses at Hans Still’s company, as we have seen, sets out to the new market concentrating on niche products such as high bay stackers or tiller operated industrial vehicles, later to become known under the brand name “Ameise”.

With the EDS 1000 and its succeeding models, STILL decides to pursue a different philosophy. By concentrating on electric trucks the company focusses on products that provide a universal profile by combining different functions on a single platform instead of developing an independent model for each application. STILL’s position as a market leader for electric trucks in Germany and Europe since the end of the sixties remains and importantly, shows that this was a successful strategy.

This long term success is based on a consistent innovation strategy that

STILL pursues to accompany changing customer demands. For example, since the beginning of the sixties the customers can choose from different types of tyres besides to the solid rubber tyres which were the standard of the time. In the same year STILL launches the EGS 2000, the first truck with a side shift function. The economic development in Europe and in the Federal Republic of Germany gives rise to a higher demand for comfort and flexibility of the machines. Consequently the trucks with the serial designation “R” which is in use until today are step-by-step equipped with ever new features such as the 5-step acceleration control, the pivot plate axle, the 3-level adjustment of the steering column and the shifting front axle. With the lateral battery change, first used in the STILL R9 counterbalance truck in the sixties, the company sets a standard for the industry still valid today.

In 1977 STILL again bundles all the innovations achieved by this point in time to build and launch a new series of electric counterbalance trucks, the R 50. These trucks turn to play the role of the Volkswagen “Golf” in the industry. The series becomes the most sold series of three-wheel trucks of its class worldwide.



In 2011, STILL funnels its experience in electric drives and differentiated user applications reaching right back into the fifties into the new RX 50. The design elements of the body originate from the RXX and the ergonomic improvements underline the growing importance of work-spaces that contribute to the well-being of the operators – particularly against the background of extended work lifetime the operators face nowadays. This shows how major changes in society, such as the demographic change, are consistently implemented into the STILL products. Features like enlarged leg room and an innovative overhead guard that provides optimum visibility and fits through doorways that are only two metres high, combine

In 2003 STILL funnels its experience in electric drives and differentiated user applications reaching right back into the fifties into the new RX 50.

functionality and comfort leading to higher efficiency in the application of the trucks. This clearly lays the tracks for the

future course of the premium brand STILL. The award of the much sought after IF Product Award to the STILL RX 50 once more underpins and honours these efforts.

The consistently growing number of functions provided by the trucks is paralleled by a rise in requirements for the service team. This is why STILL starts during the mid-sixties to hold regular trainings for the service technicians. These trainings do not only strengthen the team spirit but also provide development and sales departments with important insights from the application side of the trucks. This is a fact assigned with high importance until today. An electronic diagnostic system launched in the beginning of the seventies similar to the development in the automotive industry forms the starting point of the central control instruments for complete fleets available from STILL today. With network solutions such as the STILL Fleetmanager and the on-line based software tool STILLProActive STILL can serve its customers with tools enabling them to handle their global flow of material and information. These tools, needed at the beginning of the 21st century, root in this early diagnostic system.

ELECTRO MOBILITY AS A FUTURE FOR STILL

Today, electro mobility is one of the major trends in modern society. Especially the highly industrialised countries require emission-free vehicle concepts to reduce the effect of traffic on health and environment. This is a development offering all those companies a chance that can look back on a broad experience in the developing electric drives. This trend is further fuelled by the fact that from 2012 on, generally binding limits for CO₂ emissions will become effective. Initially applying only to the automotive sector, the need to reduce emissions is already moving into the central focus of customers deciding to purchase vehicles for internal logistics. Expanding electric mobility will therefore not only affect Germany's roads but also the aisles in logistics centres and production facilities. This opens new opportunities for companies with a high competency in electric propulsion systems – for example with respect to service. Today

Expanding electric mobility will therefore not only affect Germany's roads but also the aisles in logistics centres and production facilities.

STILL operates a tight service network of 800 service points all across Germany. In the future the service vans of STILL, all of them equipped with GPS, might not only provide fast help to the drivers of industrial trucks but also to electric cars. Electric vehicles only have 10% of the moving parts vehicles with internal combustion engines have and are therefore less prone to wear. However, the requirements in terms of knowledge and experience needed for inspection and maintenance of electric vehicles are over-proportionally higher. This is exactly what the staff in the STILL service team is prepared for – at least better than many of the traditional car repair workshops. One of the main issues in this respect is the ability to handle high-voltage systems, because in electric vehicles voltages of up to 400 volts may occur.

Right outside of the factory gates of STILL in the city of Hamburg is becoming a metropolis of electric mobility. For example with the electric Karabag New 500 E – an electric car which was developed on

the base of a Fiat by a company located in Hamburg. This car, first introduced to the public in 2011, is the first car to achieve costs levels of comparable small cars. The electric motor of the Karabag New 500

The 800 service points distributed all across Germany do not only provide fast, but also competent help in case problems with the drive and electronic on-board systems arise.

closely resembles the drive motors deployed in STILL counterbalance trucks. And this is exactly where the STILL competency in service sets in. The 800 service points distributed all across Germany

do not only provide fast, but also competent help in case problems with the drive and electronic onboard systems arise. A profitable market: The statistics of the German motorists association (ADAC) show that problems with the electric system are the lead cause for roadside problems.

This is a vision that shows how the fields of competency “electricity” and “mobility” have repeatedly proven their potential for the future – right since the first mobile generators and transport vehicles were developed by Hans Still over 90 years ago. Only companies that continue to reinvent themselves, based on their core competency, will remain fit for the future. This is not about starting a competition with the automotive industry in the long run. STILL has always used the trans-

Only companies that continue to reinvent themselves, will remain fit for the future.

fer of technology and the insights gained from looking into practical applications to further improve its electro-mechanic drives and

warehouse trucks in the interest of its own customers – and to anchor STILL as a broad brand in the mind of the public. Whether this is to develop into a new field of business revolving around electric drive systems, remains for the future to be seen.

INTERNAL COMBUSTION DRIVE SYSTEMS FROM STILL

“Economical and powerful: the IC engined trucks from STILL. From compact right up to powerful, the diesel and LP Gas trucks provide precisely the right machine for any application!” – These, quite self-confident, introduce the reader to the IC truck section on the STILL homepage. The attribute “powerful” traditionally is one of the foremost characteristics mentioned when customers and makers talk about so called “IC trucks”. This is because diesel trucks are mainly used outdoors to move heavy loads. Although by far most of the soot particles that are produced by burning the diesel fuel are collected by modern filter systems nowadays, the operation of these trucks indoors is usually prohibited. LPG trucks, driven by gas, on the opposite are used when the application scopes indoor and outdoor operation alike. In addition, the fuel for LPG trucks consists of a mixture of propane and butane. Both of these substances used to be waste products from petro-chemical industry and were simply flared off without any benefit in the past. Both truck versions offer the advantage that they can be operated “around the clock” in multi-shift operation. Only sporadic stops for re-fuelling will interrupt the work process of these vehicles. Energy efficiency and emissions are therefore the two crucial factors for IC trucks.



DEVELOPMENT OF INTERNAL COMBUSTION TECHNOLOGY AT STILL

After electric drives had been the “senior” range of drive technologies in the trucks of the STILL family for quite some time, the first member of this family with “fuel in its veins” was introduced to the industry of transports and logistics at the beginning of the fifties. The somewhat wordy type denominations “DEGS” Diesel Electric Forklift Trucks and “BEGS” Petrol Electric Forklift Trucks stand for the two twins that entered the market in 1952. Both of these trucks are the remote ancestors of the series of “Muli trucks” (Muli-Geräte), introduced in 1960, which are to make the diesel driven STILL three-wheel and four-wheel trucks world famous later on. Seen from today’s perspective, the diesel-electric drive system of these trucks may have consumed a lot of fuel. However, in the times of the Wirtschaftswunder after the war this was no argument to impair the sales figures of these trucks. At the time, the wide spread opinion of inexhaustible fossil fuels greatly predominated the public view on fuel consumption.

At the turn of the year 1964/1965 STILL changed its philosophy with respect to the IC trucks. With the legendary “R 40” series STILL introduces a pure diesel truck to the world market for the first time.

Success models such as the resilient R 43 are to characterise the range of IC trucks from STILL for most of the following two decades.

It was not until the early eighties that STILL again started to focus on its competency in electric drives again and returned to the production of diesel-electric trucks. The technological progress that had taken place meanwhile had not only made these trucks more fuel efficient but most of all made them substantially more dependable. This was

With the legendary “R 40” series STILL for the first time introduces a pure diesel truck to the world market.

the fact that had led to high acceptance of these trucks with the customers. Also, the changed economic conditions worldwide

caused a change of paradigms to take place: In the years of economic boom during the eighties these trucks, although available at higher purchase costs, were excellent in terms of efficiency and handling. And, they were available to a market on which customers were happy to pay for this “extra” in terms of comfort and performance which we refer to as “added value” today. Over a time of more than twenty years, these trucks had been continuously improved. And the associated success of the series R70 15 to R70 80 shows that STILL had chosen the right product strategy for these markets in a positive economic environment, not price-sensitive during these years of boom.

With the fall of the “Iron Curtain” and the opening of the markets in the east, STILL was to enter markets that initially did not focus on “added value” but on the pure transport function of the trucks. In

With the opening of the markets in the east, STILL is to enter markets that initially do not focus on “added value” but on the pure transport function of the trucks.

these circumstances the technologically outstanding diesel-electric trucks from STILL had to face the upcoming economies in Central and Eastern Europe that,

in the segment of IC trucks, mainly focused on Japanese trucks with torque converter technology. Such trucks are inexpensive to make, because they are made of fewer components than the trucks from STILL. The former success of these trucks is therefore not surprising: The market in such economies asks for resilient, enduring trucks at attractive prices. Only if the continuous economic development in such countries leads to more sophisticated business processes, the demand for more complex trucks will rise. Especially in areas where industrial development is not to take place at the cost of nature, the chances for suppliers of trucks with “green” drive systems will rise

A similar picture can be seen when looking at countries that are just initiating this development today and that will be highly developed industrial nations in a few years time. Examples for this are Brazil, India or China. Here the demand for resilient “all-round” trucks without any extra functions currently predominates. In order to build a sound base for future developments with customers loyal to the brand, it is important to make attractive offers now, at the beginning of the economic development. This is an entrance for STILL to become a long-term partner for all aspects of internal logistics and to anchor this perception in the mind of the public. Part of this strategy is the reanimated torque converter used in the RC 40 which was introduced to the product range by mid-2010. This type of truck with torque converter drive systems still dominates the global market with a share of over 80 percent.



The demand for eco-friendly drive systems in the developed industrial nations increases proportionally to CO₂ emissions being limited by legal regulations. Since the seventies STILL has been meeting the essential technologic conditions to build low-emission drive systems, such as hybrid systems, in series enabling the company to cover this segment. Already in 1983, STILL presented a counterbalance truck with hybrid technology. In this kind of truck at least two energy converters and two energy storage systems are used to propel the truck. The benefit: A hybrid truck will recuperate the energy released during braking and can use it again to accelerate. This energy cycle will save the truck which already is very fuel efficient, another 15% of energy. The low energy consumption of the truck also means that CO₂ emissions are cut – a clear plus for environmental sustainability. In this respect the RX 70 Hybrid from series production presented in 2011 is the consistent result of a development strategy focussing on energy-efficient drive systems. It is another example of a development by

In this respect the RX 70 Hybrid from series production presented in 2011 is the consistent result of a development strategy focussing on energy-efficient drive systems.

STILL basing on a generic development from STILL's own product portfolio. Today the serial hybrid truck RX 70 Hybrid is especially favoured by customers who attach an importance to the positive

ecological balance of their operation – for example, the HHLA at the container port of Hamburg, the recycling company ALBA Group or the logistics company Kuehne + Nagel. And the development is to continue: As an “on-board power plant”, the fuel cell can be used as a drive system in future and will stand at the beginning of the next chapter of the success story.

Whether a company is fit for the future will more than ever depend on the fact whether it is able to make its customers offers that match their individual situation in the different phases of their overall economic development. Economic developments always have to be the frame for consistency in brand politics with the goal to establish

a long term loyalty with the brand in the regional markets; be those economic developments dynamic upturns in developing countries or

In this respect the RX 70 Hybrid from series production presented in 2011 is the consistent result of a development strategy focussing on energy-efficient drive systems.

moderate growth in countries with a high level of technology that are moving towards more technological differentiation. This is the background of the strategy followed by STILL do Brasil on

the South American market: The aim is to provide a truck exactly “localised” to the demands of that specific market: The STILL CLX IC truck. The declared goal is to catch up with the market leaders in South America within a period of three years.

In this sense the broad “premium” STILL brand provides a wide portfolio of interlinked solutions and drive technologies based on individual models each focussed on the local demands of their respective market. And with the ever-present question “Which customer will need which kind of offer now and in five years time?” will keep STILL apace with current and future demands of the market at the same time.



**03 / FROM A MANUFACTURER
TO A GLOBAL
SERVICE PROVIDER**



THE INTEGRATION OF STRONG BRANDS

“National champions are becoming obsolete.” Neelie Kroos, EC Competition Commissioner

The transition of STILL from a manufacturer in Hamburg to a global partner for networks of materials and information flow would be un-thinkable without the integration of strong brands with all their competencies and their markets into the company. This part of the

The transition of STILL from a manufacturer in Hamburg to a global partner for networks of materials and information flow would be unthinkable without the integration of strong brands with all their competencies and their markets into the company.

corporate history is closely linked to the brands Saxby, Wagner, Stocka and OM. All four of these formerly sovereign brands, each of them prominent and important on their home markets can look back on a history of their own.

The individual traditions and development lines of these companies are still traceable today as all of them act together unified under the brand name STILL. However, each of these brands renders its contribution in a different way.

Let us look back into the year 1989. For the company it is not only the first year for the sales revenues to pass the billion mark (at the time in Deutsche Mark). It is also the year in which the cooperation and later integration of regional European brands under the corporate roof of STILL begins.

SAXBY

A leap back in time to London in 1863. The 42-year old technician John Saxby has become professionally experienced working at railway manufacturers and has specialised on improving signalling systems. In the course of his activities, the expert invented a new type of traffic light that was to become known as the traffic light we know our roads today. With this knowledge, he establishes the company Saxby & Farmer in the suburbs of London concentrating on the production of signalling

systems for railways. In 1878, the entrepreneur dares the crossing of the Channel and builds his first factory on the continent in Creil, France. Until the middle of the 20th century, Saxby works as a

After these takeovers, the company from Wiesbaden splits its industrial truck division into two company groups: The Linde WGA-Group on one hand and the STILL group including Saxby on the other.

supplier for different industries from this location. Only in 1950, the company starts to produce industrial trucks and presents the first forklift truck of its own production in 1954. In 1964, Saxby relocates the production to Montataire. After the American elevator manufacturer OTIS had initially taken over the majority of the company in 1970, Saxby is taken over by the English forklift truck maker Lansing in 1985. Lansing is number three in Europe at the time and the new company now firms as Saxby-Lansing. In February 1989, Linde AG, at the time number two worldwide in the segment of industrial trucks, takes over the British company Lansing. Parallel to this Linde is able to take over the largest French forklift truck maker at the time, Fenwick Manutention advancing to be the world market leader. After these take-overs, the company from Wiesbaden splits its industrial truck division into two company groups: The Linde WGA-Group on one hand and the STILL Group including Saxby on the other. From then on, STILL produces all tiller operated trucks and the electric order pickers at the site in Montataire.

1995 marks a turning point in the history of the plant in Montataire, because at this point a large part of the production of the manufacturer Wagner

from Reutlingen is relocated to Montataire. However, it is only in 2002 that Saxby is renamed to STILL and the name Saxby, rich in tradition as it was, is discontinued. In 2004, the STILL plant in Montataire is modified to become a pure assembly plant, the fleet of production machinery is downsized and the welding department is closed. With the foundation of the KION Group, Montataire is integrated into the international network of production facilities owned by the new group. At the beginning of 2010 the production capacities of virtually every production site belonging to the KION Group are assessed for subsequent reorganisation. One of the goals is to relocate the production of smaller sites to the larger ones. In the scope of this project the production of electric platform trucks and tractors from Basingstoke in England is relocated to the plant in Aschaffenburg and the production of heavy tractors is transferred to the plant in Hamburg. The integration of OM into the STILL group is accompanied by another consolidation of the plants. The production, originally spread out over the five plants in Reutlingen, Montataire, Bari and Luzzara, is to be concentrated in three plants now. It is planned to transfer the production from Montataire to Luzzara





and (the production of counter balance trucks) from Bari to Hamburg. This transfer is planned to be completed in 2012.

WAGNER

Over a period starting in 1986 and ending in 1991 Linde AG takes over the department of conveyor technology of Ernst Wagner KG located in Reutlingen in Baden-Wuerttemberg. The company is amongst the leading suppliers of warehouse equipment and driverless transport systems in Germany. Under the product name “Schildkröte” the company develops and produces computer-controlled lift trucks, tractors, combined conveyors, ex-proof lift trucks and fore-most VNA (very narrow aisle) trucks. The integration of the company grants STILL a crucial headway in the warehouse equipment segment from 1995 on. This happened just at the right moment, because the trend to “just in time” production supply amplifies the sales opportunities for software-controlled warehouse systems considerably. Although the product portfolio of Wagner perfectly complements the STILL offer, the main task in the years to come is to level the different mentalities prevailing in the south German location of Reutlingen

with the attitudes predominant at the headquarters in Hamburg in order to attune the whole company to a common corporate culture. With the foundation of the KION Group in 2006 and the merger of all industrial trucks and warehouse equipment divisions of Linde AG, the site in Reutlingen undergoes far-reaching changes. STILL Wagner is strongly affected by the fundamental reorganisation of the production structures throughout the group. The production of reach

These changes lay the tracks for the future of STILL Wagner as a part of the KION Warehouse Systems (KWS).

trucks, which has had a long tradition in Reutlingen, is moved to the plant in Hamburg. The relocation of the production capacities causes the number of

employees to drop from 450 to 250 at the site in Reutlingen. This entails a strong cut for the region causing local political protests. However, the remaining part of the plant is upgraded to become the KION centre of competency for VNA trucks. KION invests 10 million Euro into the restructuring and by this into the competitive edge of the site. The investment includes building a new, modern 60-meter long paint shop and the replacement of the high bay rack to provide efficient replenishment of raw materials from the warehouse to production. These changes lay the tracks for the future of STILL Wagner as a part of the KION Warehouse Systems (KWS). Although the renowned company name Wagner is discontinued, the future of the site in Reutlingen now bases on a sound foundation. The company KWS develops and produces system trucks for high bay racks as an internal service provider to the brands of the KION Group Linde, STILL, Fenwick and OM STILL. Besides this, the company is specialised on warehouse trucks for the VNA segment. The trucks developed and produced at the site in Reutlingen offer a well-respected, high standard of technology. This way KWS offers the brands of the KION Group trucks precisely designed to each specific customer need sourcing from a modular kit without being limited to fixed type categorisations. This is an important competitive factor in a market characterised by evermore differentiated customer demands.

STOCKA

The history of the Swedish company and with this the history of the brand “Stocka” reaches right back into the 17th century. Initially the company started by offering simple wooden push carts. Since 1918, Stocka has developed to be the synonym for high-quality and ergonomic warehouse equipment and industrial trucks right across Scandinavia initially starting off by providing first simple, manually operated lift trucks. Since the foundation of Stocka Industries in 1906, the company has been producing and dealing with several brands at the same time. In 1950, Stocka expands its range of production and commercial goods to include forklift trucks. At the point of the takeover by STILL, Stocka produces and sells a broad range of high quality products to handle goods and materials. A world-spanning net of dealers sells especially the hand pallet trucks and stackers

By purchasing parts of Stocka in 1989, a gradual integration of the company into STILL starts to take its course. Besides the utilisation of synergies in the production, this integration aims at increasing the presence of STILL in the Scandinavian export markets.

produced for export everywhere around the world. Other areas of focus are the used and rental truck business, sale of spare parts and service. By purchasing parts of Stocka in 1989, a gradual integration of the company into

STILL starts to take its course. Besides the utilisation of synergies in the production, this integration aims at increasing the presence of STILL in the Scandinavian export markets of Stocka.

In 1997, Stocka started to work as a dealer of STILL products and one year later the company can supply the complete range of STILL products and services to Scandinavia. At the beginning of the millennium, the business relations between both partners are once more tightened by STILL's acquisition of a twenty-five percent minority share of Stocka. Since the beginning of the new millennium until today, the business volume with STILL trucks has doubled to approximately 50 million Swedish Crowns. At production level the cooperation between STILL and Stock is initiated by supplying parts. The Swedish, for example,

deliver high-quality Scancab driver cabins for one of the flagships of STILL at the time, the electric R 60 counterbalance truck. In the eighties, this truck is known as the “Mercedes amongst the forklift trucks of the world”.

On 1 October 2004, STILL takes over 100% of the Swedish Stocka Industries AB. With this step, the company taken over becomes the new Swedish branch of STILL. Although the company remains to be located in Stocka-möllan, north of Malmö in the south of Sweden, the appearance of the company evolves into the appearance of the

It is only on 1 October 2004, that STILL takes over 100% of the Swedish Stocka Industries AB. With this step, the company taken over becomes the new Swedish branch of STILL.

STILL brand. The foundation of its own branch in Sweden is an important step for STILL in order to strengthen and expand its position in the Scandinavian region. This way STILL is able to

integrate the customers of Stocka including globally active company groups such as Volvo Truck, Ford and Saab Automotive, Tetra Pak, IKEA and Stora Enso into its own customer portfolio.

OM

OM stands for “Officine Meccaniche” – a name rather referring to automobiles than to industrial trucks. Nevertheless, there is a background to this company name because from 1917 on, the company, established in 1899 in Milan, concentrated on producing sports cars for several decades. The OM touring cars at the “Mille Miglia”, first hosted in 1927, finished for the first three places. In 1933, OM becomes a part of the FIAT group but still acts independently on the market. Four years after that, the production facilities in Milan and Brescia are reorganised. The product portfolio, which by now had grown to include busses, HGVs, sea vessel turbines and cooling systems is split up into three large fields of business. In 1951 OM present their first forklift truck with an internal combustion engine and it takes only

a few years for a sales organisation to grow and sell considerable numbers of these industrial trucks. In the seventies OM becomes a part of IVECO, the lorry section of FIAT. In the course of this takeover,

the plant in Bari is established and repeatedly expanded. In 1975, OM is renamed to FIAT Carelli Elevatore and takes over the warehouse truck maker Pimespo located in Luzzara, Italy in the early eighties. This

makes the company the largest Italian full range supplier of warehouse equipment and industrial trucks. I.e. this is a development quite comparable to the integration of the warehouse equipment segment from Wagner into the STILL product portfolio.

In 1992, Linde acquires a 51% participation of FIAT OM in Milan. At this point the company sells approximately 14,000 OM Pimespo trucks each year to the markets in Europe, North Africa and the Near East. In the following years, Linde systematically expands its ownership of the company, which moves from Milan to Lainate during this period.

From 1917 on, the company, established in 1899 in Milan, concentrated on producing sports cars for several decades. The OM touring cars at the "Mille Miglia", first hosted in 1827, finished for the first three places.



In 2003, Linde takes over the residual 25% of shares from FIAT (IVECO) and the brand returns to its traditional name OM Carrelli Elevatori. In accordance with the multi-brand strategy at Linde, the company initially enjoys the same independent status in the Linde Group as STILL does. At the end of the nineties Linde changes its corporate policy towards OM. Now the Italian maker is to renounce the production of small series and niche products and replace these by products from the group's range of products. With the foundation of the KION Group, OM becomes part of a new company group family. In order to strengthen synergies in production and sales – foremost on the Italian market – STILL and OM agree on a close cooperation early 2010. Already in the beginning of June 2010, the first STILL RC 40 forklift trucks with torque converters are produced by the plant in Bari. With the help of this product line, STILL aims to even better cover the demand for products with basic functions in combination with excellent quality – especially in Eastern Europe and in the developing countries.

THE INTEGRATION OF OM INTO THE STILL GROUP FORMS ANOTHER STEP TOWARDS THE IMPLEMENTATION OF THE MULTI-BRAND STRATEGY WITHIN THE KION GROUP.

The OM brand is to broaden its position on its home market Italy. This is why the sales and service organisation of the OM brand are exclusively aligned to the Italian market. In the years 2008 and 2009, the OM plant in Bari suffers extraordinarily under the global recession and the subsequent discontinuation of the production contract with Komatsu. In the context of the consolidation of production facilities within the STILL Group, the production of the trucks with internal combustion engines is relocated from Bari to Hamburg.

THE INTERNATIONAL STILL BRANCHES

The international presence of STILL reaches far back into the past. Already in 1924 – only a few years after the foundation of the company –

STILL was present at the export trade show in Leipzig. A characteristic headline in the local press of 1951 commenting STILL's participation at the Copenhagen Industrial Trade Show was "STILL around the world". Within a few years STILL was able to win the national railway companies in eight countries, amongst them Italy, Belgium, Holland, Sweden and Japan as its regular customers. The humanitarian engagement of the company had become international as well: in 1962, for example, the company delivered a free power generator to the jungle hospital directed by the Nobel peace price winner Dr. Albert Schweitzer in Gabun. The hand-written thanking letter from Albert Schweizer is one of the highlights in the company's archives today.

The growing international business also makes a substantial contribution to the positive development of the company. In 1984, the international sales add up to more than half of the total sales revenues. After domestic successes in Germany, it is therefore only consistent to cross the country's borders. This way, international business has become a vivid part of the corporate tradition. Today STILL is present on the world markets with 17 international branches, subsidiaries, over 2,000 service points and 141 dealers. Two of these international branches representing STILL around the world today shall be portrayed here – by people who have themselves made major contributions to the success of STILL in their respective home countries.

STILL BELGIUM

It is the most recent step in rounding off the market position in the Benelux countries: on 1 January 2011, STILL Belgique opens a presence in the Grand-Duchy of Luxembourg. Two technicians and an advisor are ready to attend the customers there. Which are the milestones in setting up and developing such a strong presence of STILL in the Benelux countries? Hugo De Meyer, from 1988 to 2006 director of the Belgium branch sketches the history of STILL Belgium in his interview.

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STILL BELGIUM

Hugo De Meyer, Managing Director STILL Belgium from 1988 until 2006

Hugo De Meyer was Managing Director of the Belgian branch from 1988 until 2006. Before taking this post, he had gained sales experience with the authorised Belgian dealer Egemin in Antwerpen. When the STILL branch was founded in 1979, 45 employees of Egemin joined STILL. For Hugo De Meyer this provided several opportunities. He could have joined the rack producer Schäfer, he could have hoined STILL or he could have stayed with Egemin which is what he initially did. When a new Managing Director was needed for the STILL branch in 1987, Jan van Weyck, at the time Managing Director of the Dutch STILL branch and interim Director of STILL Belgium, said to Hugo de Meyer “muet je doen, jong!”. So Hugo de Meyer called Ingo Schröder in Hamburg, to indicate his interest. “Finally”, was the only reaction he got.



Monsieur De Meyer, your time as director of the Belgian STILL branch was coined by the successive merging of the European market. A markets that had started as the European Trade Union to become what we know as the EU today. What were the milestones in this development from the perspective of STILL?

Hugo De Meyer: “Thanks to the cooperation between STILL and the Maschinenfabrik Esslingen, we were able to sell improved diesel trucks in Belgium for the first time in 1969. At the time, I was still working for a dealer, because there was no STILL branch in Belgium yet. Another important step was the availability of the warehouse equipment range provided by the takeover of Wagner. We also profited from the takeovers of Fenwick, OM and Pimespo by Linde, because each of these takeovers extended our product range.”



Did the launch of the Euro play a role for your branch?

Hugo De Meyer: “Hardly, because for the sale of STILL products the list prices and the allowed discount were fixed.”

What role did regional mentalities of logistics companies play during your active work? Do you see any significantly different regional preferences significantly differing today from preferences in the past

Hugo De Meyer: “In the past, regional preferences were much more dominant. Nowadays, quality, service and an acceptable price count. The customers know that the high quality of the trucks will pay off for them in the long run. Belgium is a small country – people know each other and entertaining these contacts in the sense of “people business” makes the difference in the end. This is why global purchase does – at present – not play a major role. The continuous removal of trade barriers facilitates access for global suppliers and purchasers.”

How was the relationship to the competitor Linde in Belgium?

Hugo De Meyer: “With the takeover of STILL by Linde, the employees of the Linde dealer Motrac thought that STILL belonged to them. On the small Belgium market, Linde was the largest competitor. There was a downright “cup competition” for the highest unit numbers. The “monthly trophy” always went to the next winner. The STILL team managed to win the trophy three times in four years.”

Do you think that in the Benelux countries long term trust in a brand plays the major role or is it short-term cost-benefit calculation?

Hugo De Meyer: “I think that in the past, the trust in a brand played a more significant role. Trust in high service quality was “extremely” important in this. Today trust in service quality is “still” important. Why? Against the background of a growing rental business (share of approximately

40%), the cost-benefit calculation plays the major role. Because at given rental conditions the purchasers can fix their budget down to the last cent. And the service is already included in the rental agreement. In all of this, the maturities of the contracts are becoming shorter and shorter. In the past, contracts expired after 5 years on average – today we are looking at an average of 3 years.

An important trend is that customers follow more and more ecologic considerations in their decision making. How much emissions, how high is the fuel consumption – these will be the criteria for the future. Special prices for low-emission trucks will be an important sales tool.”

Currently the major issue is “globalisation”. Does the common EU market still play a crucial role against this background?

Hugo De Meyer: “During the Linde era, the European common market was much more important for STILL than it is today. Compared to the markets in overseas, quality and service still play the main role on the markets in Western Europe and Eastern Europe.

Does a feature like “made in Germany” or “German engineering” still play a role for the differentiation of STLL products in the light of brands becoming global brands?

Hugo De Meyer: “Yes, absolutely! The service life still is a decisive factor and this is still closely associated to “made in Germany”. After all, three out of the four most important companies in the industry have their headquarters in Germany: Linde, Jungheinrich and STILL.”

How do you see the multi-brand strategy of the KION Group from your perspective of an international STILL branch? Do the customers understand the differentiation of the individual brands and do they compare the brands to their individual application profile?

Hugo De Meyer: "I think the number of the common parts for machines from the KION Group must be carefully limited. The customer must know that basically he is buying a STILL truck. In the long run, honesty and reliability count with key customers. As Managing Director I always attended key customers myself. This is important. These customers must be assured that one does what had been discussed before."

One aspect of your task was to motivate and lead the Belgium staff. In retro-perspective, do you see the STILL corporate culture as part of every day life in the international STILL branch as well or did regional characteristics predominate?

Hugo De Meyer: "The STILL corporate philosophy helps to entertain the brand image in day-to-day business and to ensure a uniform appearance worldwide. As a leader you have to clearly say "yes" or "no". This also applies to the relationship with the parent company in Hamburg. If there is a "no", it must be comprehensibly reasoned. In the end, the parent company can, of course, dictate how to proceed."

How would you describe the cooperation with the headquarters in Hamburg? Did you see yourself as a company inside a company or rather as a solicitor of the interests of the parent in Hamburg?

Hugo De Meyer: "Looking back, I have to say that I was both. I was a kind of executive manager for tasks assigned by Hamburg and I was an entrepreneur inside the company when it came to the practical implementation of the sales policy in daily business. On one hand there were many rules given by Hamburg, and the financial planning had to be presented there, on the other hand we were fully responsible for the annual results by ourselves. For me that did have advantages: If staff wanted things, it was easier to say that Hamburg had denied them than having to argue myself. However, I always took hiring decisions myself. Criticism was always fast. The market in Belgium is very small and 40 to 50 trucks represent a lot. One time, the OM dealer had won a tender of the

Belgium army. The call from Hamburg in which Mr. Schröder announced his displeasure came immediately."

In your opinion, what has changed over the years, especially in Belgium, but also within the whole STILL Group with respect to leading the international branches by the parent company in Hamburg?

Hugo De Meyer: "First of all: STILL no longer is the "second-most loved child" in the KION group as it had been in the Linde Group. In the KION group today, cash flow always is an issue as well – not only EBITA, i.e. a mere profit consideration as had been the case before during the Linde era. Compared to past times, the dealings with headquarters in Hamburg are an open dialogue.

In the past, nearly everything that was to be decided had to be presented in Hamburg; the complete plan from A to Z. This surely is different today. Under Linde, one had to present the planning as well. All the plans of the different associate companies were then summed up and, if necessary, the quotas were raised and passed on to the international branches. For 11 months unit figures were important and all of a sudden in month 12, it was the result (EBITA). That is of course late if the new business year starts on 1 January." As tennis player that always stimulated my sporting spirit: If I can win 6:0, I won't go for 6:2."



STILL IN THE DYNAMIC MARKETS OF THE BRIC STATES

The term “BRIC states” has been in use for some years in the economic sections of the media when reporting on the future markets – especially in the intralogistics industry. The term does not refer to a contractually organised group of nations as one may think. Much rather it is a number of countries joined by analysts and commentators abbreviating the names of four nations that are showing quite similar economic developments and respective importance. The abbreviation “BRIC” stands for the initial letters of the four countries Brazil, Russia, India and China. Although three of them are so called developing countries, all four nations are currently experiencing growth rates between 5 and 10 percent. This is why many reports forecast that by 2050 these countries will have outscored the currently economically leading G8 states, amongst them Germany and the USA. Adding to this is the fact that the BRIC countries represent 40% of the global population or – in economical terms – nearly half of the potential consumers worldwide.

Each of the individual BRIC countries has a very different profile. India, for example profits from the global lack of English-speaking computer experts and is becoming the “global think tank” with its rapidly expanding

IT industry. Russia owns vast quantities of raw materials, mining of which in rough regions requires resilient logistics. China in turn still is the “world’s workbench” and with more than a billion inhabitants it is able to generate an enormous demand. Fulfilling this demand

Although three of them are so called developing countries, i.e. virtually undeveloped countries, all four nations are currently experiencing growth rates between 5 and 10%.

will require enormous investments in logistics and intralogistics in the years to come. These countries are already a home to corporate groups that are comparable to companies from western industrial

countries in every respect. Examples are the Russian company Gazprom and the Indian steel group Arcelor Mittal to name only two.

STILL is showing its presence on these future markets – for example in Brazil. Right up to the inevitable collapse caused by the financial crisis in 2009 / 2010, the country was experiencing a powerful upturn.

STILL is showing its presence on these future markets – for example in Brazil.

The prospering development is not only the result of the economic union “Mercosur” established in 1991. This is a union in which several South American countries, one of them Brazil, have joined for a cooperation following the model of the early European Union This created a vast domestic market with over 400 million inhabitants today.

The developments in South America bear a number of opportunities for STILL. Foremost, the migration of traditional production to countries with low wage rates will cause an increasing demand for logistics and intralogistics products in the medium and long term in these countries. Predominantly products characterised by resilience, endurance and long service intervals are in demand. Especially STILL products such as the RC 40 and the ECU will profit from these market developments. This is also the reason why the CLX forklift truck, produced by STILL do Brazil and fully dedicated to the demands of the local markets, is of such a great importance for the complete South American market.

In this sense, the development is quite comparable to the situation during the Wirtschaftswunder in Germany – the years when Hans Still celebrated his first successes with his resilient diesel trucks. However, today new trends such as on-line order picking and automating develop much quicker and the demand for products offering the respective

Predominantly products characterised by resilience, endurance and long service intervals are in demand. Especially STILL products such as the RC 40 and the ECU will profit from these market developments.

additional value, will arise much earlier. Manufacturers who manage to become reliable partners for their customers already during the years of strong economic growth will also be able to distribute

their premium products later on. Reason enough to pay special attention to these markets when designing the future product and sales policy.

THE SUCCESS STORY OF KION SOUTH AMERICA

The success story of KION South America takes its beginnings in 2001 with an office and two employees at Ferrostaal. Taking over the production facility “Ameise” in Rio de Janeiro allows the company to build on a solid fundament of production knowledge. At the time, there are no strong domestic suppliers for warehouse equipment and industrial trucks in South America. Nevertheless, companies from all over the world are present with their products. The relevant

The cornerstone for a new plant is laid in Sao Paulo early 2011. From 2012 on this plant is to produce trucks especially designed to the needs of the South American market.

competitors of STILL are Nacco and Toyota. After the initial years of unhindered growth, the economic crisis of 2009 also left its effects in Brazil. However, the market already started to

recover during the second half of 2010 and has since proven surprisingly resilient. Therefore the production of the brands STILL and Linde in the KION plant in Rio de Janeiro is geared up again. The cornerstone for a new plant is laid in Sao Paulo early 2011.

From 2012 on this plant is to produce trucks especially designed to the needs of the South American market. Today KION provides work for approximately 300 employees. Sales offices represent the brands STILL and Linde in the region of Sao Paulo. In the segments of warehouse equipment and electric trucks, STILL is the market leader in South America. The total share of STILL in Brazil in the segment of electric trucks and warehouse equipment is over 26 percent.

Frank Bender (45), Director of STILL do Brazil and KION South America has been active for STILL in various functions over the past 13 years. He will report his experience in Brazil in the following interview:



STILL IN THE DYNAMIC MARKETS OF THE BRIC STATES

Frank Bender, Managing Director KION South America

Mr. Bender, as Director of the Brazilian STILL branch you are working in one of the most dynamic economic regions worldwide. In the so-called “BRIC” countries of which Brazil is a part, two digit figures for economic growth are quite common place on these markets. Does that also apply for STILL do Brasil?

Frank Bender: “Amongst the BRIC countries, Brazil has the lowest growth figures, however still in the range of high single digits. Especially in the past years, the Brazilian economy has stabilised and has become more independent from economic volatilities. The market for industrial trucks is growing quite considerably and STILL is growing faster than that market – especially thanks to the local production.”

In Rio de Janeiro and Sao Paulo STILL do Brasil operates its own production facilities that are being strongly invested into. Are the high Brazilian import taxes the main reason for that or does the high profitability of the operations play the dominant role?

Frank Bender: “Although Brazil still has quite high import taxes to protect its domestic industry, imports are becoming affordable, especially since the Brazilian Real has been appreciated. This is why local production is not just an advantage from an economic perspective but much more



from a psychological point of view. It shows that a supplier feels dedicated to Brazil and its customers. In addition, local suppliers have advantages in terms of flexibility, they allow their customers access to public funding schemes and can ensure After Sales service.“

What are the important decision criteria for customers in South America when deciding for a brand? “Resilience” or rather “premium” or “added value” respectively?

Frank Bender: “The South American markets are very heterogeneous. This becomes visible, amongst other, in the fact that there is a different market leader in each market and in each market segment. In Brazil, for example, the value segment is quite small (below 20%, three of four trucks sold in Argentina are value trucks. For the reasons just mentioned, the Brazilian market clearly prefers locally produced trucks. In general, the customers ask for technically simple and dependable trucks, because many customer do the service themselves; also because of the long distances from the next service point. Besides the known European models – STILL offers trucks that are especially adapted to the Brazilian market and that are not available anywhere else. To the largest part, these originate from Brazilian production but also from the portfolio of the KION Group.“

Which role do issues like “sustainability” and “eco-friendliness” play on the South American markets?

Frank Bender: “In this respect, South America surely has a backlog-demand. This is well comprehensible understanding that first of all the basic needs of the population need to be satisfied. However, one has to bear in mind that in the past years a growing number of large companies has turned to paying attention in keeping their eco-balance positive and use this as a sales argument. In our sector, these issues are present but until now, they have had very little effect on purchase decisions.“

Is STILL perceived in South America as a “global brand” by the customers or does the fact that there is a local production and that STILL do Brasil is also a “local brand” play the predominant role?

Frank Bender: “Both; global customers prefer global suppliers. For customers that only act locally local production is important, and this is the large majority.“

Some globally active companies concentrate less on technical details and focus more strongly on the confidence in the brand itself. They sell the same devices everywhere around the world with success. From your own view, could this be a role model for the future strategy of STILL?

Frank Bender: “A brand name is of course a support. However, it only is a part of the complete package. Crucial for the success in South America – and especially here in Brazil – is the presence of a production facility and in particular trucks that are technically adapted to the local requirements.“

You live and work here in Brazil with local workers. Does motivation and leadership work differently here from the way they do in Germany?

Frank Bender: “I am Brazilian myself – therefore this question is somewhat difficult to answer. But it is apparent that in Germany the technology and the product are in the foreground and here it is the need and the well being of the customer. Here everything is a little more emotional and not quite as rational. In Germany activities are planned at great length in detail long before due and then implemented in accordance with the plan, activities here are more often started with a less detailed general plan and problems are dealt with as they appear. Dealing with employees here is a bit more like it is in America. This surely has to do with the fact that job security as we know it in Germany is not the same here.

Which role to the promotion of young employees and the attractiveness of STILL as an “employer brand” play in the competition for young talents?

Frank Bender: “The continuous economic growth has generated a higher demand for well-trained employees. The competition for employees has tightened considerably over the past two, three years. Difficult is the area of service technicians. STILL is virtually the only company that trains the service technician itself. Therefore, it is quite natural that competitors but also customers try to recruit these employees. In other areas, the competition is also increasing. This reflects in the development of wages and salaries. Here the competition is not so strong within our own industry but more with the large automobile companies and makers of yellow goods. We are trying to make young talents loyal to us as soon as possible with trainee programs at our three Brazilian sites – with somewhat mixed results. Maybe this is the real problem of generation “Y” – not having enough patience for a sound development.”

What role does the STILL corporate philosophy play in your daily work in Brazil?

Frank Bender: “It may sound surprising but it plays a major role. This surely has to do with the (still) reasonably small size of our unit. Already when selecting new employees, we place a great value on the inter-personal level – besides the technical expertise. It is important that new employees go with the same beat as we do. We do not necessarily select the technically best person but much rather the candidate who better fits STILL as a whole. Customer orientation is at the top of our list. In addition, we train our new employees not only technically, but also with respect to their soft skills anchored in the corporate philosophy. We think that the corporate philosophy is globally applicable. It is general and yet very specific.”

What are the characteristics that you value most when selecting new staff?

Frank Bender: “As I have said, technical knowledge is not the most important point. New employees have to match our “family”. I am looking for honest people who talk about the company with sparkling eyes, people who do not only work for the money. We belong together and want to achieve something together. As I said, it is important that the candidate fit into the team.”

How do you manage to be and feel part of the STILL family despite of being 10 000 km away from the headquarters in Hamburg?

Frank Bender: “I have always felt to be a part of the family – although I am far away. The distance never was a problem for me. I could talk to the headquarters in Hamburg at any time. The colleagues in Hamburg are always open to understand the problems of other countries. To my experience this is something not given for granted in all German companies and their relationship with their foreign subsidiaries. STILL is very open. You can act locally and talk about it openly, discussing what one should do to be successful. I receive this strong support from STILL.”

Within the KION Group you are the only person leading a STILL Division and a Linde Division under one roof – and with success. In your opinion, which are the differences in the corporate cultures between the units Linde and STILL?

Frank Bender: “In the beginning, I had made a mistake. I was completely attuned with STILL and I wanted the Linde staff to become like this as well. I soon noticed that this does not work that way. Both companies are completely different and yet both are successful. Their basic attitude is similar: both think and act by keeping an eye on the needs of their customers.”

Mr. Bender, we thank you for the interview.

THE STILL BRANCHES AS NUCLEUS FOR ENTREPRENEURIAL SUCCESSES

Asking successful entrepreneurs for their recipe to successful expansions, the answer will always be the same: “delegation of responsibility”. The decentralised principle, i.e. to allow the foreman, the department manager or the director of a branch to act as if he were an entrepreneur in the company does not only prevent managers to get lost in the details of rapidly growing companies. Many company leaders are afraid to delegate tasks, be it due to wrong ambitiousness or because they do not trust their staff enough. Yet, the benefits of delegations are obvious to see. Managers win more time for the most important tasks and this reduces stress. The employees in turn are promoted and feel motivated when entrusted with new tasks and responsibilities. Decentralised work organisation is one of the principal reasons for the success of STILL. It gives room for flexibility, responsibility, efficiency and entrepreneurial work of the employees in the different departments of the company. The independent organisation applies especially to the branches in Europe. The Branch Managers acting as “companies inside the company” direct them. They enjoy far reaching independence with respect to the performance of their branch. Practically this means that they are largely responsible themselves for turnover and result.

Decentralised work organisation is one of the principal reasons for the success of STILL.

This also includes the responsibility for the selection of staff. In all of this, the branch managers do not only act in

the interest of their branch. Much more, they are also bound to the interests of STILL as a whole company. The company-wide use of an SAP-based invoicing system and a scheme of Score Cards set the dialogue between the company headquarters and the currently sixteen STILL branches on a sound basis.

The roots of the decentralised organisation of leadership at STILL reach back to the year 1953 with the foundation of the branches in Stuttgart and Frankfurt a.M. A year later, the branch “North” in Hamburg started



to operate. By these openings, the company moved through the transition from a producer to a trans-regional service provider. STILL decided very early to attend and advise its regional customers with its own staff. This, by no means was – and still is – a matter of course as becomes clear by looking at the strategies of the competitors. The company Linde MH, for example, entertains a very elaborate culture of dealership. Hans Still and the succeeding leaders of the company focused on the company’s own strengths in this respect. This strategy, which is aligned to decentralised and local demands does not only ensure the company a strong position in sales but is also the basis for the uniform service, which has gained a considerable importance of its own in the past decades.

Visible expression of the localised sales organisation is that STILL can look back on extraordinary high growth in turnover since the beginning of the seventies. While the turnover in 1971 amounts to 200 m. DM, it had nearly tripled by the mid-eighties and past the billion-mark in 1989. Parallel with this dynamic development at the company’s headquarters, STILL invests in projects to better attend its customers.

In the course of this development, the company opens new, modern branches in Bremen in 1983 and a year later in Munich in order to improve the respective regional service. Also during the “upturn east” that set in after the fall of the iron curtain, STILL pursues the principle of its own branches in the new states. The cornerstone for this development

This is why STILL organises conventions of experts all around the issue of internal logistics taking place everywhere in the new states.

is the opening of a sales office in Leipzig in 1990. However, branches alone are not enough to make the brand name STILL known in the public. This is why

STILL organises conventions of experts all around the issue of internal logistics taking place everywhere in the new states, some of them in very prominent venues such as the “Hygienemuseum Dresden”. With the help of this “direct communication”, the brand STILL with its field of competence is soon able to achieve a high presence and brand awareness on the territory of the former German Democratic Republic. Often the organising team at the headquarters in Hamburg is utterly overwhelmed by the interest of the public. Quite frequently, the conventions have to be repeated at the same location to satisfy the demand for information, which is large after forty years of socialist planned economy. Soon after, branches open in Rostock, Erfurt and Magdeburg. Initially, a tight network of authorised workshops in Cottbus, Bergen/Rügen, Golzow and Weinböla, for example support these new branches. STILL manages its very own “reconstruction East”, not only very quickly and efficiently but also with a great sense for unconventional ways to solutions. Although a kind of gold rush drives many western companies and suppliers, some of them exploiting the inexperience of the new customers at times, the Director of Sales at STILL at the time, Ingo Schröder insists on correct handling. Each STILL customer receives the common discounts – also without asking for them. A fair way of doing business, something that is not a matter of course for every competitor. Today 14 STILL branches, additional service points and rental points attend the customers in the whole of Germany.

Parallel to the establishment and strengthening of the branches in the new German states, STILL also starts to develop its presence in the Eastern European countries after the fall of the iron curtain: in Hungary (1992), Czech Republic (1993), Poland (1995) as well as in Russia. The regional presence and the related knowledge of the specific demands of these “awakening markets” is a condition for the successful sale of services and products greatly sought

Also during the “upturn east” set in after the fall of the iron curtain, STILL pursues the principle of its own branches in the new states.

after in the early phases of a developing economy. In the beginning of the nineties production capacities are built in Eastern Europe and STILL is

able to profit from them as well. In 1993, Linde starts to build the Juli Motorenwerk (electric motors) in Brünn, Czech Republic together with Jungheinrich AG. It only takes a year to start the production of electric motors at this site. Three years later the opportunity to purchase parts of gearboxes for forklift trucks from a respective plant opens up for STILL by the acquisition of the Lipo Works in Cesky Krumlov, South Bohemia by Linde. In the frame of the global KION strategy, this site undertakes to make all drive and steering axles for the company group. These examples show how intensively the pan-European and worldwide linkage of sales and production facilities of STILL will be driven forward in the future.

STILL PARTNERSHIP

However, only a handful of companies derive substantial consequences from this insight. Customers expect from their partners a cooperation that reaches far beyond the purchase of the trucks. Only companies that are able to develop from mere suppliers, to become advising partners for their customers will be able to make efficient use of the potential that lies in service. When looking at the overall life cycle of a truck it becomes clear that the largest part of revenues is generated after the initial purchase. In after sales the service effort required will

increase with the age of the truck. After all, it is in the interest of the supplier to obtain this part of the value adding chain for himself rather than leaving it to free mechanics. In addition, when purchasing a truck, more and more customers take into consideration the so-called “Total Cost of Ownership”, i.e. all costs arising throughout the life cycle of the machine. This includes all future payments due to necessary repairs, spares and services. Therefore, only producers offering

It is virtually commonplace knowledge that sales sell the first truck and service sells all the subsequent ones.

a comprehensive identification with the logistic requirements of the individual customer providing the respective service solutions will obtain long-term customer loyalty.

The benefits of effective after sales do not only lie in the resulting differentiation from the competition caused by service excellence and the related additional customer loyalty. In addition, the flow of information from the user back to the development department responsible for the product greatly helps to improve individual features of the product. This is a benefit that cannot be over-esteemed.

After sales service has a long tradition at STILL as an important field of business. Already Hans STILL saw an important factor for sustainable

customer care in the uniform appearance of the service team. Today, against the background of saturated markets in which crowding out

After sales service has a long tradition at STILL as an important field of business.

competitors is the only way to gain market shares, an excellent after sales performance is an indispensable means of differentiation from the competitors.

This is why in 2007 over 150 members of STILL from different countries developed a uniform process considering all their local experiences to establish a partnership dialogue between Sales and Service.

The resultant cooperation model “PartnerShip” harmonises all areas of activities of service technicians and sales staff by defining the processes needed for a continuous exchange of experience and information between both areas. This breaks up the traditional orientation towards individual fields of business units. The different divisions Used and Rental, After Sales and Sales and Service can act together as a team. A single database now stores and evaluates all customer data in a single unit. Proven STILL traditions such as the development of service technicians to service managers with management functions are of course adhered to and still encouraged. An essential success factor in the area of After Sales is an efficient supply with spare parts. Ideally, this will fulfil the demand by the magic triangle – high availability and demand-oriented quality at best possible customer efficiency. And, despite the branches attending their customers individually and decentralised, the basic principle applies: The process described in the “PartnerShip” from a customer enquiry, including internal service milestones right to success monitoring at the customer is a binding process for the whole STILL group.

Yet “PartnerShip” is much more than a dialogue platform for customer data: interpersonal relationships play an essential role as well. An intensive training program that brings staff from service and back office from different countries together at the headquarters in Hamburg



over a series of days promotes mutual understanding and personal relationships between the employees. The result is a notable harmonisation of the activities in Sales and Service as well as a better understanding of the pursued strategies.

In accordance with the international of STILL, the strategy inherent in the term “PartnerShip” is systematically rolled out internationally. For example in France there are customer advisors, referred to as “Responsible Service Client” (RSC) who know and analyse their customer’s demands and requirements in a holistic way. Based on their personal customer analysis they develop solutions tailored to the individual customer.

The additional revenues achieved by “PartnerShip” in after sales as well as in the new truck sales confirm the selected course as well chosen. Since its launch, this has not been a completed project but is much more a continuous process.

The additional revenues achieved by “PartnerShip” in After Sales as well as in the New Truck Sales confirm the selected course as well chosen.

The fundamental idea behind “PartnerShip” is continuously optimised and perceived as an initiative by autonomous compa-

nies such as OM that adapt it to their local requirements. Networking between Service and Sales at STILL is a successful example for the dynamics of an organisation that learns from its customers.

STILL IN DIFFERENT COMPANY GROUPS

QUANDT GROUP AND MASCHINENFABRIK ESSLINGEN

After the death of Hans Still in 1952, the company STILL moves into the focus of renowned investors from the heavy industries sector in Germany. Apparently, Hans Still had already initiated various talks with different investors shortly before his death to make sure his company had a sound basis for its future. It did not seem suitable to him to look for a successor within his own family. Amongst the most

important industrial dynasties, in the fifties as well as today, is the Quandt group. Starting with a small trade company in the textile industry in Pritzwalk Mecklenburg-Western Pomerania, Günther Quandt had started to build a vast company group with participations

After the death of Hans Still, Herbert Quandt takes over the majority of STILL directly and as a trustee for the Schweizer Bankverein.

in the Kali Group Wintershall, the predecessor of Varta Accumulatoren-Fabrik in Hagen and the Berlin-Karlsruher Industrierwerke AG. His sons

Herbert and Harald Quandt, Harald died in a plane crash in 1967, consistently developed the company group, worth billions at the time, to become an inter-industrial conglomerate. Amongst other, the group owns shares of Varta, Mauser Industrierwerke, Milupa and BMW. After the death of Hans Still, Herbert Quandt takes over the majority of STILL directly and as a trustee for the Schweizer Bankverein. For Quandt this takeover makes good sense, because the electric truck segment of STILL depends on batteries, which Quandt produces with his battery producer Afa. In a certain sense, this move wins Quandt a customer for his batteries by this move. Also the connection between STILL and the Maschinenfabrik Esslingen is relevant for the participation strategy of Herbert Quandt. Originally founded at the end of the 19th century to build a railway system in Wurttemberg which was an independent kingdom at the time, the Maschinenfabrik Esslingen develops to become the most important producer of railcars for passenger, industrial and mining pit railway trains as well as industrial trucks in the 20th century. In 1965, Daimler-Benz purchases 71 % of the company in order to use the production capacities of the Maschinenfabrik Esslingen for the production of automobiles. Until the sale to Kuwait in 1974, 15% of Daimler-Benz belonged to the Quandt company group as well. In 1968, the industrial truck division of the Maschinenfabrik Esslingen is sold to STILL. The section of Maschinenfabrik Esslingen that made industrial trucks had concentrated on heavy counterbalance trucks with capacities up to 45 tons. However, the takeover negotiations showed to be very difficult, as each side strongly wanted to promote its

own interests. This largely applied to the name of the company after the merger. The managing director in Esslingen finally prevails and the future name of the company is going to be “SE Fahrzeugwerke Esslingen”. The signature “STILL” with the “S” resembling an electric flash vanishes from the products.

In order to free production capacities in Esslingen for the automobile production of Daimler-Benz, all the means of production and the spare parts stock are moved to Hamburg virtually “overnight”. In this activity, many of the shipping containers are labelled incorrectly or they are not labelled at all so that many parts cannot be identified at the destination in Hamburg. This causes great economic difficulties

From 1968 until 1971, the name of the company is “SE Fahrzeugwerke Esslingen”.

to the newly formed company SE Fahrzeugwerke Esslingen, because delivery times extend up to one year. In the consequence,

many disappointed customers turn to the competitors. From 1968 until 1971, the name of the company is “SE Fahrzeugwerke Esslingen”. In the early seventies, the Quandt group faces an increased need for liquid funds and searches for a purchaser interested in buying the SE Fahrzeugwerke. An interested prospect is soon found in Wiesbaden: the Linde AG.

LINDE AG

“Lindes Eismaschinen AG”, founded in 1897 by a group of engineers around Carl von Linde, was a company that had initially started off by producing cooling systems. Amongst its first customers were large breweries such as Paulaner and Guinness. With the Guldener Motorenwerke, founded by Carl von Linde and other investors later on, drive technologies were introduced to the company and soon formed an independent division. In 1956, the first hydrostatically propelled transport vehicles are built and two years later, the first forklift truck with a hydrostatic drive is introduced to the public. This innovative

drive technology allows stepless shifting of gears driving forwards as well as backwards and is viewed an innovation at the time. In 1971 Linde presented their first electric truck. The takeover of SE Fahrzeugwerke in 1971 marks the beginning of a series of company acquisitions for Linde. This includes taking over of companies such as Baker in the USA in 1977 or Lansing in England in 1989. With the takeover of shares of the Italian maker OM in the early nineties, Linde cements its position as a world market leader for warehouse equipment and industrial trucks.

By the mid-eighties, the industrial truck division represents the largest division within the Linde AG. In the frame of a clear two-brand strategy, the company from Hamburg is renamed STILL to continue working under its original name. Initially, the head office in Wiesbaden allows the company to act largely autonomously. However, with the rise of Hans Meinhard to the post of Chief Executive Officer at Linde, the influence of the central office in Wiesbaden grows to envelope strategic targets for the individual parts of the company group. This repeatedly initiated sometimes tough negotiations between the responsible managing directors at the different daughter companies. Yet, in general the subsidiaries are still left to take their own entrepreneurial decisions. Primarily, the leading team at SE Fahrzeugwerke viewed

By the mid-eighties, the industrial truck division represents the largest division within the Linde AG.

the takeover by Linde AG as a release. Within the Quandt group, STILL had been led very closely and surprising decisions, such as

the mentioned relocation of all means of production from Stuttgart, or Esslingen, had caused avoidable turbulences and deep disturbances in the production process. Further noteworthy acquisitions made later on, such as those of Saxby, Wagner Schildkrote, Ameise do Brasil, Stocka and OM would not have been possible without the financial power of Linde AG. STILL benefits from each of these takeovers and is able to develop to a global service provider step-by-step due to these takeovers. This was also the context to form a “yellow group”

within the Linde organisation scoping STILL Komatsu and OM – an intention that was given up some time later. Amongst other reasons, this strategy failed because it was not possible to obtain a majority of Komatsu and because the promised synergies from transfer of technology unilaterally flew towards Komatsu. The joint project of a truck with an “intelligent torque converter”, intended to replace the diesel-electric drive from STILL, never matured to serial production due to a lack of energy efficiency. Viewed from this perspective, STILL’s position as a premium supplier within the KION Group is also a result of its affiliation with Linde AG in the years 1973 until 2006.

KION GROUP

In 2002 Prof. Wolfgang Reitzle joined the Board at Linde and only six months later, he takes Chair of the Board. At the same time, in 2003, Hans Meinhard leaves the Board. Right from the beginning, Wolfgang Reitzles intends to concentrate the company on industrial gas. Under his leadership, Linde AG is able to take over the British industrial gas producer BOC in 2006. With this takeover, Linde advances to be one of the world market leaders in the gas sector. In 2007, the head office of the group is relocated from Wiesbaden to Munich.

In order to refinance the BOC participation and to make Linde a pure manufacturer of technical gasses, Wolfgang Reitzle joins the three brands STILL, Linde Material Handling and OM Pimespo to form a holding. Its name: KION Group. The word “Kion” originates from the Massai. For this East-African tribe of warriors and nomads, “Kion(gozi)” refers to the concept of “Taking leadership”.

At this point, the KION Group achieves a turnover of 3.2 bn Euro worldwide and a market share of 19 %; figures that place the group a close second to Toyota who have meanwhile become. Wolfgang Reitzle had already imposed savings measures on the

industrial truck division and by this he had raised the result. In 2006 the Linde Group sells KION Group for approximately 4 bn Euro to the American financial investment firms Kolberg, Kravis, Roberts (KKR) and the investment bank Goldman Sachs. The investors accept the agreements safeguarding the sites of the brands Linde MH and STILL which had the worker’s representatives of the forklift truck divisions in Germany. The most important issue of these agreements, applicable until 2011, is that no German plants are to be relocated to Eastern Europe. In return, the employees agreed to more flexible working hours and to cuts in additional pay and extra-tariff compensation.

Today the KION Group comprises the brands STILL, OM, Linde Material Handling, Linde Hydraulics, Fenwick, Baoli and Voltas. The multi-brand strategy is an elementary component of the KION group strategy. The declared goal is to maintain market leadership in Europe. Each brand has its own strengths and profits from the common KION distribution channels on its individual markets. The offer reaches far beyond the mere new truck business. On the contrary, the KION Group covers all the demand customers have for solutions and services for the internal flow of material. The KION Group is present

in all growth regions worldwide.

Beneath the roof of the KION Group, STILL has found a home as an independent brand and profits in many ways from the strong network it is part of.

It operates production plants in Brazil as well as in China and maintains an elaborate sales and service network in all the growing

markets worldwide. Its centralised purchase organisation offers all brands of the group cost advantages. The foundation of KION Warehouse Systems GmbH (KWS) follows exactly this philosophy. The subsidiary develops and produces system trucks for high bay rack systems for the group brands Linde, STILL, Fenwick and OM and functions as a specialist for warehouse equipment trucks at its location in Reutlingen. As an internal service provider for the group, KWS supports the brands of the KION Group in project planning and order handling. KWS also offers technical support for cold

commissioning of the trucks and trains technicians and service staff of the group as well as dealers to ensure optimum attendance for the customers of the respective machines. Beneath the roof of the KION Group, STILL has found a home as an independent brand and profits in many ways from the strong network it is part of.



04 / **CORPORATE CULTURE
AND VALUE-ORIENTED
LEADERSHIP**



CORPORATE CULTURE AS A SUCCESS FACTOR

“A company that only lives to make profit is like a person only living to breathe.”

Hermann Josef Abs, Former spokesman of the board of Deutsche Bank AG

How does the corporate philosophy, so often referred to in the past years, reflect in the everyday life of employees, suppliers and customers and why is it so important? Some examples from daily life clearly show what this is about. It is corporate culture if a salesperson attends a customer after he has purchased, in the same attentive manner as before. Or, if the employees notably work together to achieve a

common goal and support each other in every thinkable way. This also includes that every employee has a clear picture of what his senior, his colleagues and his internal customers expect of him.

These examples show that corporate culture has economic effects – positive and negative as well. Customers will, whenever they have a choice prefer suppliers that are professional, cooperative and friendly.

And it is corporate philosophy if a solution is found for all problems arising; not someone to blame. These examples show that corporate culture has economic effects – positive and negative as well. Customers will, whenever they have a choice prefer suppliers that are professional, cooperative and friendly. Highly qualified employees will work in companies with a constructive culture in which performance pays off – otherwise they will leave. A good corporate culture is therefore a competitive advantage – and one that is not easy to copy.

The way people in the company interact and how they present themselves externally has a lot to do with the history of the company. The experiences of staff made in a company forms a type of “collective



memory". This memory often surfaces at key turning points of the company, for example, during a crisis or other major challenges. The German management consultant Michael Löhner describes corporate culture as the "sum of the habits of an organisation". Corporate culture is therefore not a fixed condition but something that incessantly develops, as the company makes new experiences every day. Processes that have led to success in the past are filed as nostrums and are remembered in critical situations. But after all there is no security

guaranteeing that the "historic" success recipes will again lead to success some time later as well. For example, structural changes on a global level will require deviations from "we have always done it this way here". If companies

are confronted with surprising developments, for instance, loosing market shares, it is initially not clear whether such a development represents an exceptional situation or a fundamental change of trends. This is exactly why a company needs to carefully look at its habits

and customs in a critical way from time to time. This is the only way it can make sure that it will remain competitive on the long run. On the other hand it will also make no sense to fundamentally change a corporate culture which has a tradition reaching back several decades. That would mean to eradicate all think patterns and behavioural habits. The company would lose its "inner point of rest" and fall apart. This is why in the year 2000, STILL defined its essential values and traditions in a corporate philosophy. It defines all the fundamental values that are to be adhered to in long term – despite all economic ups and downs or any other changes.

On the other hand it will also make no sense to fundamentally change a corporate culture which has a tradition reaching back several decades. That would mean to eradicate all think patterns and behavioural habits.



CORPORATE PHILOSOPHY AT STILL

As a basis for successful work, the daily interaction and the diligent attendance to customers, ideas and resources the employees of STILL have agreed on the six basic principles below:

WE ARE AT OUR CUSTOMERS' DISPOSAL.

THEY DETERMINE OUR WAY OF THINKING AND ACTING.

In us, customers have a reliable partner. We see our task as collaborating constructively in the success of our customers. This is the only way in which we can secure our own long-term success. Customer satisfaction is therefore always the focal point of our working practice

This is why the needs and wishes of our customers are the guiding principle for our work – they are both a task and an incentive alike for every employee. We want to earn the trust of our customers afresh every day.

WE OFFER PROGRESSIVE, COMPLETE, TOP QUALITY SOLUTIONS AND ASSIST OUR CUSTOMERS IN INCREASING THEIR OWN COMPETITIVENESS.

We use our expertise and innovative power to develop new products and services, from which our customers will profit. To enable us to offer highly economical solutions in the future, we shall continue to develop ourselves.

We aim for technological market leadership. Where we have already achieved this, we intend to safeguard it by further expanding it. In this, quality, long service life and operating convenience are at the forefront.

OUR STRENGTH IS OUR COMMUNAL EFFORT. THE BASIS FOR THIS IS THE EXPERTISE AND COMMITMENT OF ALL EMPLOYEES.

Our concept of ourselves as part of a partnership, which is the basis for our customer-oriented behaviour, also makes its mark on the collaboration within the company. For us, partnership means jointly taking responsibility for defined goals and in this orienting ourselves to the capabilities of the particular partner.

This form of working together is possible by having confidence in our dealings with each other. This creates an atmosphere of mutual co-operation in which the commitment to the community is regarded equally as highly as the individual personal performance. In this respect we regard the fostering of creativity, expertise and willingness to work in our employees as strengthening the community.

WHILST USING TECHNICAL PROGRESS, WE STILL PAY ATTENTION TO OUR ENVIRONMENT.

The environment is the basis of life for us and future generations. Realising this makes it obvious that we have to deal responsibly with the resources of nature. This expresses itself in the use of recyclable materials, in non-harmful manufacturing processes, energy-saving products and environmentally friendly work places.

Where technical progress can contribute to maintaining the environment and reducing pollution, we shall use it and participate in its development

WHEREVER WE OPERATE IN THE WORLD WE SHALL RESPECT THE COMMUNITY AND CULTURAL STANDARDS.

As a company which operates globally, we are a guest in many countries. Our relationship with our hosts is marked by respect for the local manners and customs, standards and laws, religions and faiths.

We promote understanding of each other by encouraging our domestic and foreign employees to get together in mutual exchanges of experience of other cultures.

WE WANT EVERYONE WHO IS ASSOCIATED WITH US TO GAIN FROM THIS.

In our relations with others we behave as self-confident partners. We use our strengths and capabilities constructively, co-operatively and geared towards solutions.

We are convinced that reliability and partnership relationships pay off – for our customers, employees, suppliers and shareholders.

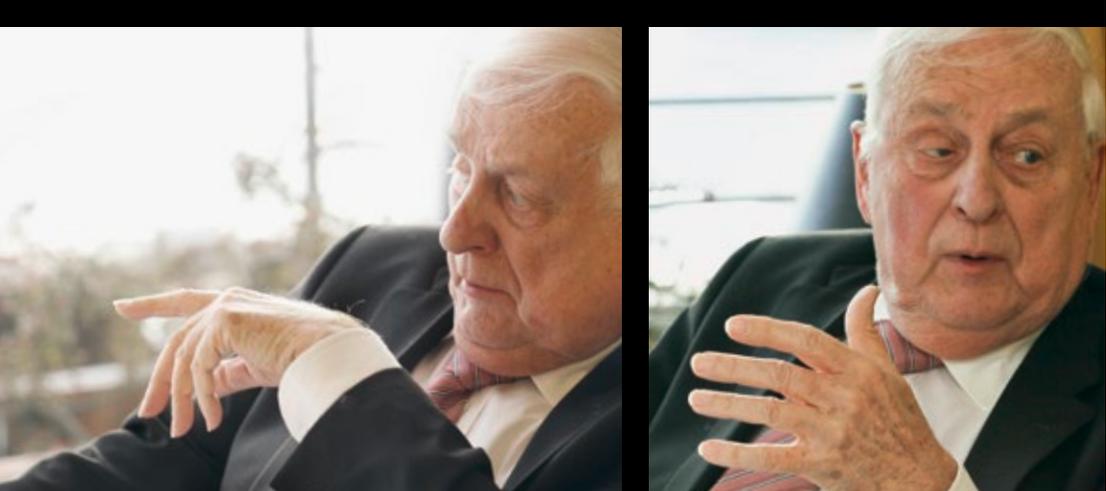
VIVID COMMUNITY AT STILL

It is the people or, to be more exact, their values that drive the people's strategic planning and activities, their creativity and their inventor spirit, that ensure continuity and consistent entrepreneurial development keeping traditional brands such as STILL alive and fit for the future. In the past ninety years the brand STILL could not have proven as successful as it was, had it only depended on the result of excellent engineering. What has made STILL distinctive over these many decades is the healthy combination of leading edge technology and vivid company values in the style of a "STILL family". This is why these lines of development in the history of innovation and corporate culture that form a "brand with a soul" are to be traced here. The pioneer spirit of the founder and his successors, the strive for perfection but also the partnership amongst the employees, suppliers and most of all customers –

What has made STILL distinctive over these nine decades is the healthy combination of leading edge technology and vivid company values in the style of a "STILL family".

all these, and other value-based characteristics form an inheritance applicable until today – despite all historic turning points in the development of the country.

These values that had originally been defined by the founder of the company are in effect until today – although and because the challenges of today greatly differ from those in the initial years of the company STILL. Two long-standing employees will share their personal views of the corporate culture at STILL.



CONTINUITY AND DEVELOPMENT IN THE SUCCESSION OF HANS STILL

Ingo Schröder, STILL Managing Director from 1971 until 1997

Mr. Schröder, I would like to open our conversation by shedding a light on your career steps in the company STILL. When did you join STILL and in which function. When did you assume the post of Managing Director? Until when did you have this function?

Ingo Schröder: "In 1950, I began a three-and-a-half-year apprenticeship at STILL and after that I took additional training in administration. I was active for STILL for 53 years, 26 of them, from 1971 until 1997, as Managing Director. After that I was member of the Supervisory Board for another 5 years."

Could you describe in a few words, the character of Hans Still and the values that were important for him as an entrepreneur?

Ingo Schröder: "He was a very humane boss. An example: in the difficult post-war years STILL deliveries were often paid in kind - for example with food. Hans Still, knew of the need of his employees and shared this food with his staff. Much earlier he had already founded the "Nothilfe Hans Still e.V.". hip I received DM 50 every month from the Nothilfe as well. The wage of DM 20 in the first year of apprenticeship were simply not enough. My parents had died during the first year of my apprenticeship."

The foundation of the STILL branches in Stuttgart and Frankfurt a.M. in 1953 marked the beginning of a development one could describe by saying “the branch manager is an entrepreneur inside the company”. From your perspective of a long-standing managing director at the headquarters, in how far was – and still is – this decentralised management model one of the supporting pillars of the success story of STILL?

Ingo Schröder: “The branch manager is an “entrepreneur inside the company”. This is a very important principle. The man out there in the branch is an entrepreneur! A sales organisation must be independent to a high degree to really function well.”

In 1968, STILL (including SE) achieved a turnover of DM 71 m. 1989 STILL passed the billion mark (in DM) for the first time. An impressive development. However, a company is more than its figures. Which were, in your opinion, the major milestones from the sixties to the nineties – beyond the figures?

Ingo Schröder: “The three most important milestones were in 1968 the takeover of the Maschinenfabrik Esslingen, the takeover of Saxby and Wagner as well as the German unification. There had already been a cooperation with Wagner before the takeover by Linde. Mr. Winter, sole owner of Wagner in Reutlingen then sold to STILL. His son became head of the warehouse equipment division. Only in 1994, the organisations of STILL and Wagner were merged. The differences in the mentalities, however, could be clearly felt.”

How was it possible to maintain the specific leadership and corporate culture of STILL during the integration of these companies and what was your strategy in the takeover of Saxby?

Ingo Schröder: “During the first exploratory talks we encountered Mr. Rosenkranz at Saxby. He was the nephew of Dr. Jungheinrich and had been Managing Director of Jungheinrich in Hamburg for many years. Later, he left Jungheinrich and joined the Lansing daughter Saxby as Managing Director. He was my point of contact and I met him there again in 1988. At the time Saxby belonged to Lansing. For us, it was important to create an atmosphere of trust. I had invited the complete management team of Saxby to Hamburg and built up trust by hosting “STILL evenings”. Also, when replacing leadership functions in France, we made sure to choose staff who were not 100% STILL.”

Following the principal “think global – act local” STILL, in 1990, operated branches in Belgium, Denmark, France, Great Britain, Italy, the Netherlands, Austria and Switzerland as well as in Spain, the Czech Republic, Poland and Hungary. How can a management harmonise regional requirements on one hand with central management demands on the other?

Ingo Schröder: “My topmost guidelines and most important values have always been fairness, punctuality and reliability. This especially applies to the selection of staff, most of all sales staff. I talked to each and every German salesperson before agreeing to their hiring. No result without market shares. One cannot see everything from the cost perspective. If you want to destroy a company, put a controller in charge.”

In 1973, Linde AG took over 100% of the shares of SE Fahrzeugwerke GmbH, i.e. of STILL. What was your experience to be part of a large group also owning another competitor in the industrial truck segment – Linde?

Ingo Schröder: “Altogether STILL benefitted from belonging to the Linde Group. The competition of two brands in the group worked well for us, because a dealer organisation (Linde) was encountered by a branch organisation (STILL). Of course there were irritations at times because of statements that were not always true. We had to stick to the truth because we had a revision department that could check us – in contrast to the independent dealers who didn’t.”

How was the relationship to the competitor from Hamburg, Jungheinrich?

Ingo Schröder: “Dr. Friedrich Jungheinrich had worked for Hans Still when he was young. Maybe this was the reason why Jungheinrich always was a “friendly competitor” for STILL. It was always possible for branch managers of both companies to share experiences. In the USA there were even initiatives to find dealers who would sell both: STILL and Jungheinrich trucks. After the takeover of Steinbock, Jungheinrich followed the strategy to make trucks on one assembly line differing only in colour. I do not think that it is possible to make everything in a single plant. The development departments of two brands must remain independent. Otherwise real competition will not flourish. In addition, a sales person calling the technical department to inform them about problems in daily application of the trucks will experience difficulties if his point of contact does not belong to “his brand”.”

STILL introduced flexible working hours already in 1972 – an innovative model at the time. What was your experience and principles in cooperation with workers representatives and with the workforce in general?

Ingo Schröder: “Altogether the cooperation was very positive, characterised by mutual respect. At works meetings I have always made my opinion public clearly and frankly. I was “entitled” to do that, because throughout

my whole development in the company from electrician to managing director I was always “one of them”. In this manner, I directly addressed the absences due to illness – for example the higher quota of foreign staff. This was reasoned by changed eating habits. That was an explanation I could not agree to and I told the colleagues this in personal talks. Still these employees brought me Turkish Honey from their home countries as a present.”

STILL used the fall of the iron curtain and the German Reunification to expand. On the organisational side this was done by founding new branches. On the communicative side, expert conventions made this expansion a success. How did you manage in this rapid growth and in the “gold rush” not to lose the unmistakable STILL values as guiding principles?

Ingo Schröder: “I was in the USA when I first heard of the fall of the Wall. My first thought was that STILL must cancel the exclusive contract with our dealer Möllendorf in Berlin. The second was that, at all means, I wanted to build up a service organisation with “locals” in order to avoid any impression of a “conquistador mentality”. This reflected the experience with SE. With the experts conventions in all of the new states, we managed to become very well known. They were an important instrument for communication and surely contributed to our undisputed leadership in the market. The principle of “Fairness and Equality” was very important to us. All of the service technicians in the new states received the same wages as in the western states, because we also charged our customers the same hourly fees as in the old states. Discounts were granted to the customers from the new states without exceptions – also if they did not ask for them due to a lack of knowledge. In the end none of us had imagined how long it would take to see the new states “flourish”. This is why we decided not to turn the sales office in Chemnitz into a branch but to close it later on.”

The history of the company STILL has been characterised by an inventor spirit and power of innovation always oriented towards and sometimes even anticipating the requirements of the markets. This requires excellent employees working in positions exactly matching their profile. How did you find, promote and lead these talents in such a way that the development pipeline of STILL is constantly filled with innovations?

Ingo Schröder: “It has always been a personal matter of my heart to select the sales staff myself. I did not let myself be influenced by any guidelines from the company group in this respect. My management principle has always been “rather do something, than ask too many questions”. If one starts by asking questions, one is also expected to ask for feedback before taking decisions some time down the line. Still, I always was in close contact with my leadership team exchanging opinions. And I never hired a job applicant against the will of their future senior. Apart from this, the foremost principle is: “we live from our customers”. This is why so many people in the company had the impression of an organisation that was largely driven by the sales team. I always prefer a pragmatic approach. It is like a large cooker with many pots on. One always has to watch out that none of the pots over-boil. Our branches set out their targets together with me in the annual budget meeting. I did not put them under pressure by constant monitoring. That is something that only limits people. They put enough pressure on themselves by looking at the planned figures. If the goals were not delivered, we looked for the reasons. If we thought the manager was the reason, we would replace him. But this only happened very rarely.”

How do you see the development of the diesel truck segment at STILL?

Ingo Schröder: “Wherever STILL was new on the market, diesel trucks sold well – for example in the Czech Republic after the fall of the Iron Curtain. But we always experienced difficulties to hold the market

shares for a long time. This created a high level of suffering, because STILL had developed diesel-electric drive systems already in the 50ies. On one occasion we tried to illustrate the economy of these trucks at the trade show in Hannover. We used oil barrels and the singer Volker Lechtenbrink to try and bring the message across. In the end we did not find a satisfying solution to increase the share of IC truck sustainably. STILL’s great strength always was with the electric trucks. However, for a global player to be successful STILL must be competitive in this segment to prevail on the long run.”

Mr. Schröder, we thank you for this interview.

THE EMPLOYER BRAND STILL IN GLOBAL COMPETITION FOR TALENTS

In the future, confidence in a strong brand will not only be relevant for success in dialogue with customers and partners. In an ever more global competition for talents and skilled employees only those companies that place themselves on the market as attractive employers, signalling and communicating innovative power. This aspect of the appearance of a “corporate brand” is paid little attention to in many companies – despite a notable shortage of skilled workers. Future talents do not only seek a transparent and tolerant corporate culture in which cultural differences within the teams are viewed at and appreciated as benefits and assets. Most young talents look for opportunities to freely develop their potential in the service for the company. “Making employees co-employers” could be the best motto to describe the challenges companies face if they want to drive innovations in the future.

In fact this means: The future challenge of an innovative economy is to enable its people to fully develop and use their skills. This includes that each company establishes a “pool” in which potentials are especially encouraged and demanded to show their talent to take over future leadership and management tasks. STILL, for example, pursues this strategy with its “Young Professionals Program” (YPP). This training programme trains young talents from all over the world for the next steps in their career at STILL.

“Making employees co-employers” could be the best motto to describe the challenges companies face if they want to drive innovations in the future.

A look at the statistics of companies that are most attractive to young, trained talents and that are viewed with most appreciation will

show that it is those companies offering well aimed training and the respective freedom of development. The consistent exchange of employees and workforce across countries and continental borders is just one of the many aspects of globalisation. In the years to come this development will grow evermore encompassing. In particular for

people in the developing countries like India or China mobility will be the key to a better life. The logistics industry, and with it intralogistics companies, will profit from this – in terms of their products and services as well as in terms of being attractive employers in the future.

Talents may also start their own company and develop to become renowned competitors. A look into the history of STILL shows this very clearly: Dr. Friedrich Jungheinrich had worked for several years as a development engineer for STILL before he joined the company of his father in 1953 and started to build up today’s Jungheinrich AG. But the example also shows that ideas are often stronger than any effort to keep them exclusive to a single company.



STAFF ORIENTATION AS PART OF CORPORATE CULTURE

Werner Dubberke, Mechanic and Replenisher at STILL since 1966



Mr. Dubberke, to open our conversation I want to ask you for a brief summary of your professional life with the company STILL. When did you join the company and in which function? Which are the functions you had during your career at STILL?

Werner Dubberke: "I joined STILL on 1 April 1966 beginning my professional training as a mechanic and I completed my training on 30 March 1969. Following that I worked for three months in the mast assembly department before I was called to join the army. On 1 January I returned to STILL - now to work in the assembly lines for the R 17, 18, 19 trucks. This included assembly of the driver cabins, the adjustment of each truck - all of this is work that is done on the line today as well. For a short time I have also worked in the production of cylinders in the Linde plant Aschaffenburg. Since 1971, I have regularly attended the trade shows in Hanover, Leipzig and, after the fall of the Berlin Wall, I participated in the "Brandenburg-Tour". Here I worked for the STILL experts conventions. Finally I was a "Provider" responsible for the flow of materials at the assembly lines. I am going to spend the last 2 years of my professional life until 31 May 2013 in part-time retirement. After all I will have worked 47 years full time and 2 years part-time retirement at STILL."



At the beginning of your work life, the image of the typical “industrial worker” coined daily work in the production. Today these professions require technically sophisticated training. Has this development affected the personal relationships of the people working in the production?

Werner Dubberke: “Seniors need to be example role models – for example, when adhering to safety standards. Also when taking a delegation of visitors through the plant, it is necessary to wear safety boots. After all a worker will be warned orally if they do not adhere to the standards. Especially in group work, as it is very common nowadays, it is important to cooperate well and to take work off the foreman. For this, the interpersonal relations are crucial. The weekly feedback sessions are a great help to keep everyone aligned. If we have disciplinary problems with young trainees we ask them to complete an official evaluation form. It is always a great help to enable young people to look into the mirror themselves. The increasing number of staff with a foreign background on the other hand has hardly caused any problems.”

One of the specialities at STILL was – and is – the long period of employments at STILL and the fact that many of the employees are working here in the second and third generation. It this principle of the “STILL family” and the “human factor” one of the crucial success factors still today?

Werner Dubberke: “I have always perceived STILL as a “family company”. You could make a lot of change with your work, because you always knew the people you worked with well. This type of comradeship has ceased in the present. The respect towards workers with long years of experience is less prominent nowadays. But still there are many families that have remained true to the company in the second and third generation. My father has worked as a foreman for Hans Still; my daughter learnt her profession as an industrial clerk at STILL.”

The relationship between production staff and management pursue common goals, but often there are different opinions about how to arrive at these goals. How would you characterise the relationship between staff and management at STILL?

Werner Dubberke: “As part of the production staff, one is rarely in direct contact with the management – the department manager is the immediate senior. There have often been incidents where we thought “not with us”. One could always get an appointment with Ingo Schröder at the time, and I made use of that. I have always had the impression that our concerns were taken seriously. The fact that Mr. Schröder himself had started his career as an apprentice at STILL had surely contributed to that. My father was his foreman; he was “one of our kind”.

Today the works council plays a more essential role than ever when it comes to protect the interests of the employees. After all, nearly 80% of the staff are organised in the union. I myself never was a candidate. In my daily work in the workshop I have enough “mediation work” to do.” During the crisis 2008/2009 the management acted very far sighted. The short-time payment in Hamburg greatly contributed to job security.”

Did the takeover by Linde AG and the later incorporation of the STILL brand into the KION Group have any notable effect on your work in the production?

Werner Dubberke: “Apart from details such as the cylinder production for the Linde plant in Aschaffenburg, the takeover by Linde did not have a great effect on us in production. With the integration into the KION Group, parts of the production were relocated from Reutlingen and later from Basingstoke and Bari. These relocations were always challenging for the plant in Hamburg. In this I have to say that the cooperation with the colleagues from STILL Wagner in Reutlingen was very collegial, despite the fact that there were redundancies in Reutlingen.”

The training of young talents is traditionally highly esteemed at STILL. Nearly all the apprentices are taken over into a fixed job when their training is complete. Do you think STILL is well prepared for the future against the background of a shortage of skilled workers?

Werner Dubberke: "In any case STILL is well prepared in this respect. Altogether one must say that training at STILL is and always was first class and also the interpersonal development of the young talents is greatly encouraged. You can also see this in the fact that professionals who have learnt their profession at STILL are happily accepted elsewhere."

Especially characteristics such as "inventor spirit" and the recognition of potentials for improvement by staff make a company strong. Do you see STILL on a good way into the future in this respect?

Werner Dubberke: "The improvement suggestions for the STILL idea management are an important contribution to secure the future of the company. This encourages the identification of each individual with the company and by this contributes to the idea of the "STILL family"."

Mr. Dubberke, we thank you for the interview.

STILL EMPLOYEES ARE “BRAND MAKERS”

“Like” – or do not like. The growing importance of social networks such as “Facebook” makes employees the most important ambassadors of the company brands they work for every day. The comments of staff, completely unfiltered by communication and PR departments, quickly give customers, journalists and job applicants an authentic picture – and sometimes unveil a bitter truth. Paul Watzlawick’s statement “you cannot not communicate” shows the relevance and points at the rising necessity of what is referred to as “internal branding”. What is this term about and what does STILL think about it?

What we call “brand commitment” today, refers to what people in the past left behind in the factory when they put their work overall into their lockers: the identification with the brand they worked for every day. Today this identification is lived out on social and private platforms. With their internal branding, companies undertake to entertain an ongoing, long-term dialogue with their staff. This dialogue may take years to bring substantial fruit. At STILL, the departments for Marketing and Internal Communication are commonly responsible for the strategic and operative tasks internally communicating the characteristics of the STILL brand.

However, for the Human Resource department at STILL, internal branding is a challenge as well. It is simply not possible to “buy” employees with a “brand personality”. The company has to develop them by its own efforts. The best is to compare the characteristics of the brand to the characteristics of the applicant in the job interview. Strategically, internal branding at STILL is planned and implemented in five steps: The future brand ambassadors have to know, understand, accept, apply and defend the STILL brand identity.

This means that the people responsible for this have to impart the knowledge about the brand in an interesting and sustainable way. It is not enough to only understand all the relevant contents of STILL

as a brand but these contents must also be accepted in a personal commitment and applied personal behaviour at the workplace “corporate behaviour” and, if necessary, defended – of course in a peaceful way and with a smile.

“INTERNAL BRANDING” AT STILL

One thing that is often underestimated is the impact on the public perception of the brand which is not only affected by the current employees of a company but also by its former employees who have retired. These employees also contribute to the reputation of a brand. Due to the extensive internal knowledge they have about the company they worked for, these former employees enjoy high credibility by whomever they talk to. STILL integrates this important target group in various ways including the employee

With their internal branding, companies undertake to entertain an ongoing, long-term dialogue with their staff.



magazine “aufgegabelt” and invitations to the annual “STILL Family Day”. Already the founder of the company, Hans Still, was convinced that his company had an unmistakable personality due to certain defined characteristics. “Innovation – Brand – People”: this “triad” puts the credo of Hans Still to the point.

The task today is to revitalise this “spirit” every day anew and to anchor the brand image of STILL deeply in the public mind: The transition from a maker of forklift trucks to a supplier of complete solutions. For example, with the support of the STILL brand musical in which STILL staff can prove their show talent and make the trade show presentations of STILL and unmistakable infotainment experience. Apprentices and staff are invited as guests to watch the rehearsals in the factory. Also in the production facilities, it is not enough anymore to do the job one has been trained for. It has become much more important to keep an eye on the overall picture. Instead of saying, “I make wheel bearings”, the employee who is attuned to the brand will say, “I build a truck with the best emission values worldwide – from STILL”. A survey conducted back in 2009 showed a high level of brand commitment at STILL in general. There is a bundle of initiatives and activities with which STILL implements its internal branding.

STILL MANAGEMENT OF IDEAS AND STILL PARTNERSHIP

A crucial part of successful brand behaviour at STILL is the internal idea management system. It is the well-informed and motivated staff bringing forward new ideas on their own behalf who fill the innovation pipeline. STILL encourages this by publically appreciating promising ideas and temporarily provides a MINI with the STILL branding to the person who has made the suggestion. Another initiative to care for the brand internally is the “STILL PartnerShip” described above.

THE STILL MEDIA SCENERY

Around the employees magazine “aufgegabelt”, first initiated by Hans Still, STILL today entertains a broadly varied media scenery. It includes the STILL intranet with its own publishing unit, the “Boarding-Days” for new employees and apprentices as well as employer campaigns with real STILL employees in the ads. Brand rallies, story telling and interactive experiences from the company history enable employees at major events to explore the STILL brand.

For STILL, internal branding is more than a communication task in the frame of caring for the brand.

All of these are activities that frame the field of a vivid corporate culture supporting the internal

branding at STILL. For STILL, internal branding is more than a communication task in the frame of caring for the brand. It is an attitude in line with the brand, asking a uniform commitment and continuous dialogue from everyone in the company – the CEO just as well as plant security.



05 / **TRUST IN THE
BRAND STILL**

FUTURE SUCCESS FACTORS FOR STILL

“If we first knew where we are and where we are drifting, we would better know what to do and how to do it.”

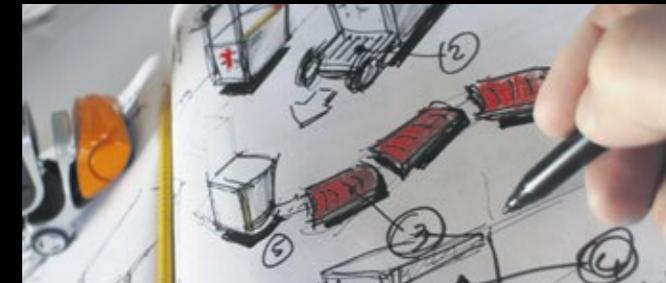
Abraham Lincoln, 16th President of the United States of America (1861-1865)

More than ever before, the added value of a company will have to be viewed from the perspective of the customer. But how can we know today, what our customers will need in the future? And, which criteria will prevail in decision making during the purchase process? Will it be tangible cost advantages or rather the “soft” factors such as eco-friendliness? Trend researchers and futurologists are able to provide predictions and indications for future development trends of internal logistics processes. Believing in these future and trend forecasts means to believe in irreversible that determine the future of our markets.

More than ever before, the added value of a company will have to be viewed from the perspective of the customer.

ENVIRONMENTAL SUSTAINABILITY AS A COMPETITIVE FACTOR FOR STILL

The global initiatives aiming to reduce the emission of CO₂ on a worldwide level and the fading availability of natural resources definitely belong to the megatrends relevant for STILL in the future. Especially in the highly energy-consuming industries such as logistics, energy technologies will grow more and more important. Besides work and financial means, the environment will be regarded a productive factor in the future as well. The CO₂ balance of products and services will therefore be a crucial decision criterion for customers and by this a



competitive factor that is to be taken seriously. The efficiency mode for trucks, STILL Blue-Q, an intelligent auto-pilot for economy and ecologic responsibility, shows that STILL has put this future-issue “green economy” on its agenda very early. The core message “Blue-Q = IQ” puts it: trucks fitted with the system can save up to twenty percent of energy during operation, depending on the application profile, driving style and truck equipment. Added to this, are cost savings due to less wear, a longer life-cycle of the battery and improved utilisation per battery charge for the electric trucks. The benefit is comparable to a motorist saving fuel in city traffic by anticipating upcoming traffic situations and adjusting the driving style accordingly. Blue-Q adjusts the truck to different application profiles. This significantly reduced CO₂ emissions, produced by the internal-combustion engine or by generating the electric energy for the battery. Blue-Q actively involves the driver in the concept: The driver can decide to press the Blue-Q button on the dashboard, consciously opting to achieve the task using as little resources as possible and by this work as environmentally sustainable as possible.

TRANSPARENT COSTS THROUGHOUT THE LIFE-CYCLE

The ecologic costs caused by the use of free resources, such as air or water for the production of goods have largely been neglected in most economic feasibility assessments. But, in areas where environmental factors become economically relevant, a holistic view of all costs occurring during the complete life-cycle of the truck become more important. This is why STILL offers the instrument of “Total Cost of

Ownership” (TCO) which makes the costs of the product transparent covering all the phases of the product-cycle: the purchase phase,

the operation phase and disposal. TCO tells companies today what they are going to save tomorrow. Beyond the increasing importance of ecologic cost factors, TCO is also becoming more important against

TCO tells companies today what they are going to save tomorrow.

the background of modern ways of distributing work loads in internal logistics. Nowadays, contract logistics service providers offer a broad range of services along the value adding chain of their industrial customers. The services of a contract logistics service provider reach far beyond the traditional logistics tasks such as transport, turnaround and warehousing. End-customers reduce the complexity of their own business and win the dependability of a flexible partner who keeps their expert knowledge continuously up-to-date. For companies like STILL this development requires to know future developments and trends in intralogistics earlier than before and this knowledge must be fed into the development of new products and services.

THE AGING SOCIETY AS A CHALLENGE FOR STILL

Another megatrend relevant for STILL is the “demographic change”, i.e. the fact that we all are becoming older, having to work longer in our lives. Especially aged workers are more dependent on ergonomic workspaces – in particular on warehouse trucks. This is why STILL will focus on such features in the future as well, emphasising on optimising the ergonomics of the workspace for the driver. An example is the ‘hydraulically dampened driver-space with the proportional seat-footplate adjustment available in the FM-X reach truck. While, on one hand there will be more and more older workers having to work longer, there will also be fewer, and sometimes insufficiently trained, young people leaving schools to start professional training on the other hand. This will make higher investments in internal education and training inevitable and will also require greater efforts to strengthen STILL as an employer brand. The target must be to make STILL attractive for future talents and to make employees loyal to the company by internal training and education.

NEW MARKETS FOR STILL: DEVELOPING COUNTRIES ARE BECOMING INDUSTRIAL NATIONS.

The challenges STILL is confronted with by the more frequently necessary adjustment of development and production capacities are clear to see: It is necessary to make systematic use of the synergies generated by the cooperation between all KION companies in areas such as development, production and sales on an international level without diluting the core of the brand STILL. Strategic terms such as “networking innovative products with innovative software”, “customer-specific service solutions” and “solution-oriented advising” are reliable guidelines for consistent navigation to pursue this goal. In keeping on track, against the background of multiple changes, is more than ever important for STILL to clearly shape its profile as a supplier of customer-specific internal logistic solutions in the awareness of global markets.

A GOOD FUTURE UNDER THE ROOF OF THE KION GROUP

From the level of developing countries, some countries become dynamic industrial nations within just a few years. During this process, technologically sophisticated and networked products and services replace the robust trucks such countries sought after before. Coming from low wage levels, new competitors arise in these countries, especially in the Asiatic region. At the same time the European markets are slowing down and additional growth is only possible by crowding competitors out. Globalisation is therefore not only a trend strongly affecting the former separation between regions of production and regions of use for the products. Globalisation is also shifting the balance of worldwide markets. This is intensified by declining customer loyalty, leading to more volatile markets – despite all efforts made in terms of service. This development leads to fluctuations in production and by this to a need for faster adjustment of production capacities.

CUSTOMER-SPECIFIC SOFTWARE AS A SUCCESS FACTOR

Following the trend of global e-business in an “on demand world”, the demand for customer-specific services and products which can be administered by company-compatible customer software is to rise. In addition, much of the data acquired this way will be subject to data protection restrictions – an aspect that will require close attention. Linking every logistic manoeuvre in a company with a digital “footprint” generates confidential company data and will increase the safety requirements for the software in the trucks. Developing customer-specific software-solutions for individual flows of material is an important field of profit for STILL. In combination with a special software the STILL Fleetmanager allows to acquire, compute and make all truck and driver data available on-line today already. Different kinds of access permissions are securely controlled by access media such as

In combination with a special software the STILL Fleetmanager allows to acquire, compute and make all truck and driver data available on-line today already.

chips, a chip card or a PIN code. Together with STILLReport and STILL ProActive, Fleetmanager 4.x is one of the software products that are joined up under the term “STILL Fleet

Data Services” providing a high profit potential in the future markets. Product and service offers with an additional value transparent for the customer, such as the STILL Partnerplan and the Fleet Data Manager will not only lead to higher customer loyalty; they also charge the brand STILL with additional advisory competence. Innovations like the cubeXX underpin the STILL claim to be “first in intralogistics”, especially by the flexibility and multi-functionality future customers will ask for to meet the demands of their ever more volatile markets.

STILL – A BRAND OF TRUST

In all of the said above, there is one all-deciding factor. It is a factor that often remains unconsidered as it is difficult to measure: The trust in the brand of the company. In this sense trust means more than “customer satisfaction”. Only if it is possible to become a “brand of trust” in all concerns of the flow of material and information in the perception of the customer and only if STILL is integrated in the corporate planning of the future by the customer and in this process STILL will allow its customers to identify their own future fields of profits, this will secure the future of the brand itself. Concrete this means that customers and partners automatically associate STILL with its promise so that there is only one answer to any present and future question concerning the respective field of competency: STILL.

If products become more relevant for purchase decisions, emotional motives will become more important in purchase decisions. The management consultant Reinhard Sprenger put it this way: “Companies do not sell products, they sell trust”. The products and services of a company can be as innovative and efficient as may be – as long as the corporate brand does not generate a sound basis of trust in the perception of the customer, the risk that the competitors will prevail in the purchase decision is very high. Strong brands function like a compass the customers use to navigate.

The link of trustworthy brand leadership, customer-oriented innovations and the employers being consciousness ambassadors for the STILL brand will decide whether STILL will remain “first in intralogistics”. Or, to quote Hans Still: “Our task is to solve individual transport requirements. When developing new transport technologies it is our goal to meet future developments already today.” More than ninety years after the foundation of the company STILL, the tracks leading to this goal are laid.

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