

# Main Developments in the European Postal Sector

## **Appendices:**

- Note on Methodology (A1)
- Question Modules (A2)
- Regulatory Part (B)
- Sector Development (C)
- General Data (D)

Bad Honnef, July 2004



---

**- Appendix A -**

Note on Methodology  
Question Modules

---



## **Contents**

### **A1 - Note on methodology**

- A1-1.1 Terms of reference
- A1-1.2 Data Collection
- A1-1.3 Reluctance of commercial operators to provide data
- A1-1.4 General remarks to the data presented in the Appendices B, C and D

### **A2 - Question modules**



## A1 - Note on methodology

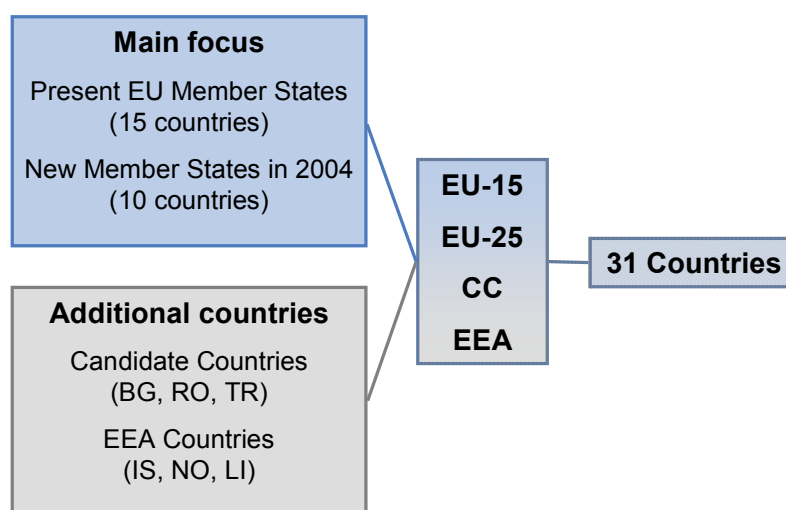
### A1-1.1 Terms of reference

The Terms of Reference (ToR) of the study called for collection of a broad range of regulatory, economic and social data related to the delivery services sector. In respect to each facet of sector development, the ToR requested the study to

1. Provide an insightful overview of the status and evolution of the postal sector. In this context the study will consider main regulatory and market developments of the postal sector.
2. Update and test the conclusions drawn in the Commission's 2002 report on the application of the Directive 97/67.
3. Compile a list of relevant indicators for following-up sector developments in connection with the application of the Community and national strategies and policies;
4. Provide documented and substantiated conclusions and recommendations.

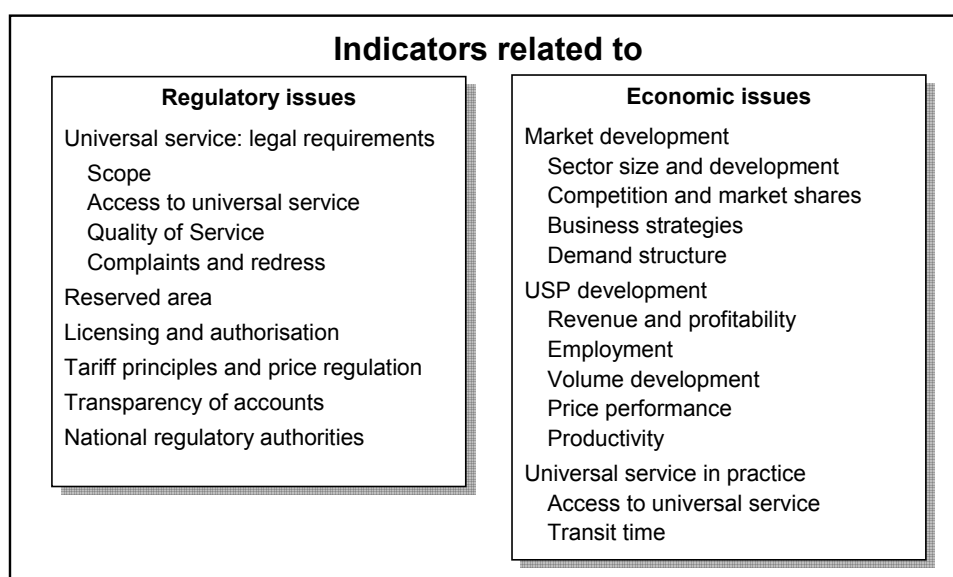
In accordance with the ToR, the present study covers a range of 31 countries as shown in Figure A1.

Figure A1: Geographical scope of the study



The diversity of indicators sought by the ToR is summarized schematically in Figure A2.

Figure A2: Scope of contents: Indicators of the postal sector (Part II)



## **A1-1.2 Data Collection**

WIK-Consult began the data collection phase of the study by gathering basic information about the sector from postal specific internet sites, reports published by national regulatory authorities (NRAs) and competition authorities, annual reports of universal service providers (USPs), and statistics from the Universal Postal Union (UPU) and EUROSTAT. WIK-Consult also sought information publicly available from competing postal operators (CPOs), associations of consumers, business mailers, and unions related to the postal sector. Desk research also included recent postal studies commissioned by the European Commission.

The heart of the information collection process, however, was a detailed computerised questionnaire posted on a secure internet site established for this survey. More than 1,000 questions were grouped into 31 “question modules”, each containing 10 to 40 (or more, in a few cases) questions dealing with a specific topic. See Table A1. Despite the large number of questions required by the breath of the study, every effort was made to ease the process of completing the questionnaires. The great majority of questions required only selection from among standardised answers (yes/no, look up, or multi-select questions) or entry of simple numerical data.



Table A1. Question modules

	Question module	NRA	USP	CPO	Consumer	Mailer	Union
101LW	Laws	X					
102RG	Regulations and secondary legislation	X					
211RF	Regulatory framework	X					
212US	Universal service	X					
213AC	Access to universal service	X					
214RA	Reserved area	X					
215AL	Authorisation and licensing	X					
216AS	Transparency of accounts	X	X				
217PR	Price regulation	X					
218QS	Quality of service	X	X				
219CR	Complaints and redress	X	X				
221FD	Future development	X	X				
231CD	USP collection and delivery		X				
232TR	USP transport, safety, environment		X				
233TD	USP technological development		X				
234PP	USP price performance		X				
236MS	Market structure analysis	X	X				
237DS	Demand structure analysis	X	X				
251CA	Consumer associations				X		
252BM	Business associations and mailers					X	
253UN	Postal unions						X
254CP	Competitive postal/express operators - European level			X			
255CN	Competitive postal/express operators - national level			X			
301OP	Postal operators data			X			
302MS	USP market share data	X	X				
311UP	USP corporate data		X				
321US	USP universal service data		X				
322PR	USP universal service prices		X				
323VO	USP postal volumes data		X				
324RV	USP postal revenue and cost data		X				

Three types of question modules were employed. The 100-series of question modules requested information on postal laws and regulations. The 200-series of question modules requested information on various feature of postal regulations, operations, and market development. The 300-series of question modules asked for year by year data for the six years from 1998 to 2003. In the 300-series question modules, the respondent was also requested to indicate for each item whether the information provided was available for public disclosure or considered confidential; where data was not provided, the participant was asked to indicate whether the reason was unavailability, commercial sensitivity, administrative burden, or other reason.

Different participants were asked to complete different question modules. The main burden fell on the NRAs and UPS, who were asked to complete 16 and 17 question modules, respectively. CPOs were addressed in 2 or 3 (if operating at both national and EU levels) question modules. Consumers, mailers, and unions were invited to complete a single question module.

WIK-Consult explained the objectives of the study and details of the internet survey to interested parties in a public workshop in Brussels on February 4, 2004. In this workshop and in subsequent meetings with representatives of customer and consumer associations,<sup>1</sup> WIK encouraged the broadest possible participation in this survey. To complete a questionnaire, respondents needed only to request an access code from WIK. All stakeholder groups were contacted. NRAs,<sup>2</sup> USPs, major express operators and European associations received their access codes by letter or e-mail at the start of the internet survey. National consumer and business associations were invited to enrol. European associations – including ANEC, FEDMA, EMOTA and Eurofedop. The number of access codes distributed and the number of completed responses are shown in Table A2.

---

<sup>1</sup> Meeting of the Postal Users' Group (PUG), CEN Consumer Task Force

<sup>2</sup> National regulatory authorities and Ministries responsible for the postal sector have been asked to complete the questionnaire collaboratively.

Table A2 Number of distributed access codes and return

Countries	Organisation	Number of distributed access codes	Number of answered questionnaires
<b>MS</b>	USP	25	23
	NRA	25	25
<b>EEA</b>	USP	3	2
	NRA	3	2
<b>CC</b>	USP	3	1
	NRA	3	2
<b>EU</b>	Consumer associations	1	0
	Business associations	6	2
	Trade unions	2	1
	Express service provider	7	0
<b>MS</b>	Consumer associations	7	3
	Business associations	15	5
	Trade unions	3	2
	Other postal operators	5	2
<b>Total</b>		108	70

Notes:

(1) The number refers to questionnaires expressly released by the USPs and NRAs.

The internet survey was open for data entry by respondents from February 15 until June 21, 2004. An initial deadline of March 15, 2004, was extended several times to give respondents more time to complete the question modules. Preliminary results were presented at the second public workshop in Brussels on June 9, 2004. Following this workshop respondents were provided comments and corrections which have been taken into consideration in the final report.

WIK-Consult has sought to evaluate the reliability of data in this report by several methods. First, the questionnaire asked for key information in several different ways in order to provide a basis for the assessing the internal consistency of answers. Second, in certain areas, similar questions have been posed to USPs, NRAs, and the other stakeholders in order to develop multiple perspectives. Third, missing information and inconsistencies have been addressed in telephone interviews and by written communication.

As far as possible missing information has been completed by using secondary source data. The most important indicators concerned and the respective secondary sources used are listed in the following table.

Table A2: Use of secondary sources

<b>Indicators</b>	<b>Secondary source</b>
Postal outlets and street letter boxes	UPU
Mergers & acquisitions	Annual reports (1998-2003), news items
Financial data of USPs	Annual reports (1998-2003)
Employment data of USPs	Annual reports (1998-2003), UPU
Volume information of USPs	Annual reports (1998-2003), UPU
Price information of USPs	Price lists, USP internet homepages

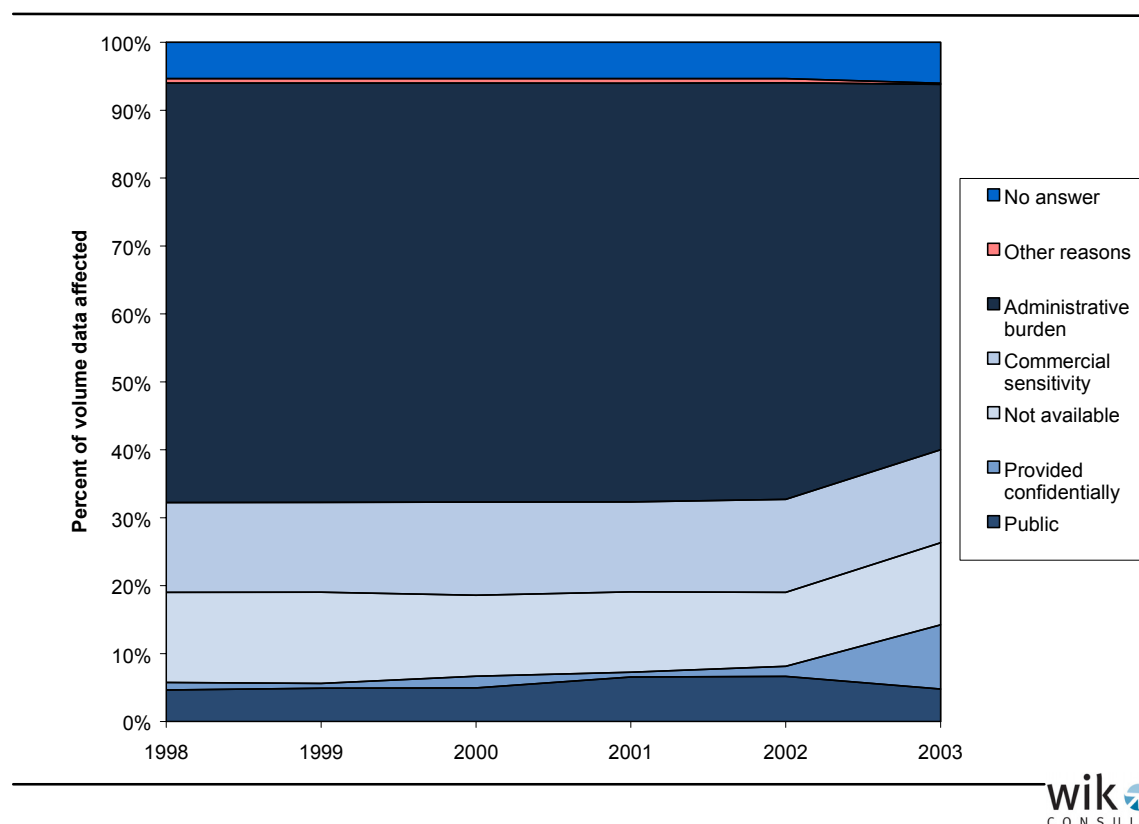
### **A1-1.3 Reluctance of commercial operators to provide data**

In the course of this survey, it became evident that the much of the market data sought by the Commission in the terms of reference cannot be collected by means of a voluntary procedure. Although it would seem that all postal operators have an interest in well informed public policy towards their sector, few of the more commercially oriented USPs and none of the large CPOs were willing to provide a significant proportion of data requested.

One example, volume data, will suffice to illustrate this problem. In this survey, we requested USPs to provide data on the volumes of postal services broken down by market segment and by year. As directed by the Commission's terms of reference, the segmentation of market data reflected in the survey is derived directly from legal categories established by the Postal Directive.

All together, we requested 46 elements of volume data from each USP for each of the years 1998 through 2003. We sought overall data for three types of postal services: letter post, parcels, and express. Data for each type of service was to be divided between domestic, outgoing cross-border, and incoming cross-border. The letter post data was to be further divided by separating out items of correspondence (and further separating volumes for the unreserved portion), direct mail (and further separating volumes for the unreserved portion). Similarly, the volume of parcels outside the non universal service area was to be separated from the total volume of parcels. Overall volumes of cross-border letter post and parcels sent to the Community were to be separated from total outgoing volumes. In respect to express items, we requested summary data for domestic, outgoing, and incoming services. In addition, we asked for basic data regarding two non-postal services: unaddressed mail and document exchanges. In each case, we gave the USP the opportunity to request confidential treatment of the data element or to explain why the data element could not be provided.

Figure A3: USPs response to volume data requests



The response of USPs to these requests is summarised graphically in Figure A3. In this figure, all volume data elements weight equally. However, the answers of each USP are weighted according to the relative importance of the USP in the Community's letter post market. To obtain an understanding of the Community postal market as a whole, it is obviously more important to obtain data from USPs in the largest member states than from those in the smallest. From this figure, it may be seen that USPs provided much less than 10 percent of the volume data sought. Most of this data was supplied on a public basis (the bottom tier of the figure), but USPs requested confidentially for a portion of this information (second tier). More than 90 percent of the volume data was not provided. USPs declared that 12 percent was not available and 13 percent too commercially sensitive to provide even on a confidential basis. USPs declined to provide a further 60 percent of the data requested because the administrative burden of producing the information was too great. In the case of about 5 percent of the data sought, no answers were given and no explanation supplied.

From CPOs, we requested only 9 basic data elements related to volume: the number of letter post items, parcels, and express items that were (1) collected and delivered within the EU-25 member states, (2) imported into the EU-25 member states and delivered, and (3) collected in the EU-25 member states and exported. To provide comparability with earlier studies, we also requested the same 9 data elements for the EU-15 member states. As with the USPs,

we requested this data for each year for the period 1998 to 2003. We received no data at all from the CPOs until after the close of the internet survey, at which time they provided a copy of an old study prepared by a consultant (MRU) that supplied only summary data about some markets for the year 2000. For the purposes of this study, the data provided by the CPOs was of minimal value.

#### **A1-1.4 General remarks to the data presented in the Appendices B, C and D**

The appendices B and C comprise data collected via the internet survey. Both appendices do not include any information coming from secondary sources e.g. annual reports or other studies but merely present the answers submitted by the respondents. In some cases answers have been corrected based on

- (1) the notes provided in the survey,
- (2) comments made by the respondents following the second public workshop, or
- (3) answers of follow-up questions distributed by WIK-Consult in order to clarify some answers.

Each table has the same structure. They present the answers of the EU-25 (alphabetical order), EEA-3 (IS, LI, NO) and CC-3 (BG, RO, TR). Below each table the corresponding question modules and question numbers have been listed. The reader can consult the question modules presented in Appendix A by using this cross reference. Besides, the data source abbreviations used in the table have been explained column by column. In some tables notes have been attached in order to explain some answers or to include additional information provided by the respondents.

Appendix D includes general time-series information on the countries surveyed, i.e. population, GDP and exchange rates.

## **A2 – Question modules**

## Question Modules

Question numbers as shown on internet except question numbers for second and third copy of 255 CN are increased by 100 and 200, respectively.

Choices for questions relating to data availability are omitted to save space. In all cases, the following options were provided; (1) Public; (2) Confidential; (3) Not available; (4) Commercial sensitive (not disclosed); (5) Administrative burden (not disclosed); and (6) Other explanation

### Question Module: 101LW Laws

1.	LW0Name	Name of postal law currently in effect? (text)
2.	LW0Date	Enactment date of this law?
3.	LW0DateEff	Effective date of this law?
4.	LW0Trans1	Does the government consider this law to be a complete transposition of Directive 97/67? (yes/no)
5.	LW0Trans2	Does the government consider this law to be a complete transposition of Directive 2002/39? (yes/no)
6.	LW0En	Is there an English translation of this law? (yes/no)
7.	LW1Name	Name of postal law in effect on 1 Jan 1997? (text)
8.	LW1Date	Enactment date of this law?
9.	LW1Status	Status of this law? (select one) 1. In effect      In effect substantially as enacted 2. Amend        In effect but substantially amended 3. Repeal        Repealed 4. Other         (see Notes below)
10.	LW1En	Is there an English translation of this law? (yes/no)
11.	LW2Cur	Is the current postal law the first substantial postal law adopted since 1 Jan 1997? (yes/no)
12.	LW2Name	• If not, name of the first postal law (other than current) adopted after 1 Jan 1997? (text)
13.	LW2Date	• Enactment date of this law?
14.	LW2Trans1	• Does the government consider this law to be a complete transposition of Directive 97/67? (yes/no)



101LW

15.	LW2Trans2	• Does the government consider this law to be a complete transposition of Directive 2002/39? (yes/no)
16.	LW2Status	• Status of this law? (select one) 1. In effect      In effect substantially as enacted 2. Amend        In effect but substantially amended 3. Repeal        Repealed 4. Other         (see Notes below)
17.	LW2En	• Is there an English translation of this law? (yes/no)
18.	LW3Cur	Is the current postal law the second substantial postal law adopted since 1 Jan 1997? (yes/no)
19.	LW3Name	• If not, name of the second postal law (other than current) adopted after 1 Jan 1997? (text)
20.	LW3Date	• Enactment date of this law?
21.	LW3Trans1	• Does the government consider this law to be a complete transposition of Directive 97/67? (yes/no)
22.	LW3Trans2	• Does the government consider this law to be a complete transposition of Directive 2002/39? (yes/no)
23.	LW3Status	• Status of this law? (select one) 1. In effect      In effect substantially as enacted 2. Amend        In effect but substantially amended 3. Repeal        Repealed 4. Other         (see Notes below)
24.	LW3En	• Is there an English translation of this law? (yes/no)
25.	LW4Cur	Is the current postal law the third substantial postal law adopted since 1 Jan 1997? (yes/no)
26.	LWNotes	Explanatory Notes: please include the number of questions referred to.

102RG

**Question Module: 102RG Regulations and secondary legislation**

1. RG1Name	Name of first major secondary postal legislation (if any)? (text)
2. RG1Date	• Date of adoption of this secondary postal legislation?
3. RG1Type	• Type of secondary postal legislation? (select one) <ul style="list-style-type: none"> <li>1. Reg Regulation, decree, ordinance, or instruction</li> <li>2. License USO license condition</li> <li>3. Con USO contract with USP</li> <li>4. Other (see Notes below)</li> </ul>
4. RG1Auth	• Government authority adopting this legislation? (select one) <ul style="list-style-type: none"> <li>1. NRA National regulatory authority</li> <li>2. MinPost Minister responsible for postal sector</li> <li>3. MinOther Minister other than the minister responsible for post</li> <li>4. Ombud Public ombudsman</li> <li>5. PM Prime Minister</li> <li>6. Council Council of Ministers</li> <li>7. Parl Parliament</li> <li>8. Court Courts of law</li> <li>9. None Authority not clearly defined</li> <li>10. Other (see Notes below)</li> </ul>
5. RG1Status	• Status of this legislation? (select one) <ul style="list-style-type: none"> <li>1. In effect In effect</li> <li>2. Pending Substantially completed but not in effect</li> <li>3. Other Other - use Explanatory Notes</li> </ul>
6. RG1Scope	• Subjects covered by this legislation (multi-select) <ul style="list-style-type: none"> <li>1. US Definition of universal service</li> <li>2. Access Access conditions to universal service</li> <li>3. ResArea Scope of reserved area</li> <li>4. AuthGen Authorisation for postal operators outside univ. serv.</li> <li>5. AuthUS Authorisation for postal operators within univ. serv.</li> <li>6. USF Universal service fund</li> <li>7. Acct Accounting rules for the USP</li> <li>8. Price Price regulations</li> <li>9. QoS USP quality of service targets or monitoring</li> <li>10. Compl User complaints and redress</li> <li>11. NRA Organization and proceedings of NRA</li> <li>12. Other Other issues - use Explanatory Notes</li> </ul>
7. RG1En	• Is there an English translation of this legislation? (yes/no)
8. RG2Name	Name of second major secondary postal legislation (if any)? (text)
9. RG2Date	• Date of adoption of this secondary postal legislation?

102RG

10.	RG2Type	<ul style="list-style-type: none"> <li>• Type of secondary postal legislation? (select one)               <ol style="list-style-type: none"> <li>1. Reg Regulation, decree, ordinance, or instruction</li> <li>2. License USO license condition</li> <li>3. Con USO contract with USP</li> <li>4. Other (see Notes below)</li> </ol> </li> </ul>
11.	RG2Auth	<ul style="list-style-type: none"> <li>• Government authority adopting this legislation? (select one)               <ol style="list-style-type: none"> <li>1. NRA National regulatory authority</li> <li>2. MinPost Minister responsible for postal sector</li> <li>3. MinOther Minister other than the minister responsible for post</li> <li>4. Ombud Public ombudsman</li> <li>5. PM Prime Minister</li> <li>6. Council Council of Ministers</li> <li>7. Parl Parliament</li> <li>8. Court Courts of law</li> <li>9. None Authority not clearly defined</li> <li>10. Other (see Notes below)</li> </ol> </li> </ul>
12.	RG2Status	<ul style="list-style-type: none"> <li>• Status of this legislation? (select one)               <ol style="list-style-type: none"> <li>1. In effect In effect</li> <li>2. Pending Substantially completed but not in effect</li> <li>3. Other Other - use Explanatory Notes</li> </ol> </li> </ul>
13.	RG2Scope	<ul style="list-style-type: none"> <li>• Subjects covered by this legislation (multi-select)               <ol style="list-style-type: none"> <li>1. US Definition of universal service</li> <li>2. Access Access conditions to universal service</li> <li>3. ResArea Scope of reserved area</li> <li>4. AuthGen Authorisation for postal operators outside univ. serv.</li> <li>5. AuthUS Authorisation for postal operators within univ. serv.</li> <li>6. USF Universal service fund</li> <li>7. Acct Accounting rules for the USP</li> <li>8. Price Price regulations</li> <li>9. QoS USP quality of service targets or monitoring</li> <li>10. Compl User complaints and redress</li> <li>11. NRA Organization and proceedings of NRA</li> <li>12. Other Other issues - use Explanatory Notes</li> </ol> </li> </ul>
14.	RG2En	<ul style="list-style-type: none"> <li>• Is there an English translation of this legislation? (yes/no)</li> </ul>
15.	RG3Name	Name of third major secondary postal legislation (if any)? (text)
16.	RG3Date	• Date of adoption of this secondary postal legislation?
17.	RG3Type	<ul style="list-style-type: none"> <li>• Type of secondary postal legislation? (select one)               <ol style="list-style-type: none"> <li>1. Reg Regulation, decree, ordinance, or instruction</li> <li>2. License USO license condition</li> <li>3. Con USO contract with USP</li> <li>4. Other (see Notes below)</li> </ol> </li> </ul>
18.	RG3Auth	<ul style="list-style-type: none"> <li>• Government authority adopting this legislation? (select one)               <ol style="list-style-type: none"> <li>1. NRA National regulatory authority</li> <li>2. MinPost Minister responsible for postal sector</li> </ol> </li> </ul>

102RG

	3. MinOther	Minister other than the minister responsible for post
	4. Ombud	Public ombudsman
	5. PM	Prime Minister
	6. Council	Council of Ministers
	7. Parl	Parliament
	8. Court	Courts of law
	9. None	Authority not clearly defined
	10. Other	(see Notes below)
19. RG3Status	• Status of this legislation? (select one)	
	1. In effect	In effect
	2. Pending	Substantially completed but not in effect
	3. Other	Other - use Explanatory Notes
20. RG3Scope	• Subjects covered by this legislation (multi-select)	
	1. US	Definition of universal service
	2. Access	Access conditions to universal service
	3. ResArea	Scope of reserved area
	4. AuthGen	Authorisation for postal operators outside univ. serv.
	5. AuthUS	Authorisation for postal operators within univ. serv.
	6. USF	Universal service fund
	7. Acct	Accounting rules for the USP
	8. Price	Price regulations
	9. QoS	USP quality of service targets or monitoring
	10. Compl	User complaints and redress
	11. NRA	Organization and proceedings of NRA
	12. Other	Other issues - use Explanatory Notes
21. RG3En	• Is there an English translation of this legislation? (yes/no)	
22. RG4Name	Name of fourth major secondary postal legislation (if any)? (text)	
23. RG4Date	• Date of adoption of this secondary postal legislation?	
24. RG4Type	• Type of secondary postal legislation? (select one)	
	1. Reg	Regulation, decree, ordinance, or instruction
	2. License	USO license condition
	3. Con	USO contract with USP
	4. Other	(see Notes below)
25. RG4Auth	• Government authority adopting this legislation? (select one)	
	1. NRA	National regulatory authority
	2. MinPost	Minister responsible for postal sector
	3. MinOther	Minister other than the minister responsible for post
	4. Ombud	Public ombudsman
	5. PM	Prime Minister
	6. Council	Council of Ministers
	7. Parl	Parliament
	8. Court	Courts of law
	9. None	Authority not clearly defined
	10. Other	(see Notes below)
26. RG4Status	• Status of this legislation? (select one)	

102RG

	1. In effect	In effect
	2. Pending	Substantially completed but not in effect
	3. Other	Other - use Explanatory Notes
27. RG4Scope	• Subjects covered by this legislation (multi-select)	
	1. US	Definition of universal service
	2. Access	Access conditions to universal service
	3. ResArea	Scope of reserved area
	4. AuthGen	Authorisation for postal operators outside univ. serv.
	5. AuthUS	Authorisation for postal operators within univ. serv.
	6. USF	Universal service fund
	7. Acct	Accounting rules for the USP
	8. Price	Price regulations
	9. QoS	USP quality of service targets or monitoring
	10. Compl	User complaints and redress
	11. NRA	Organization and proceedings of NRA
	12. Other	Other issues - use Explanatory Notes
28. RG4En	• Is there an English translation of this legislation? (yes/no)	
29. RG5Name	Name of fifth major secondary postal legislation (if any)? (text)	
30. RG5Date	• Date of adoption of this secondary postal legislation?	
31. RG5Type	• Type of secondary postal legislation? (select one)	
	1. Reg	Regulation, decree, ordinance, or instruction
	2. License	USO license condition
	3. Con	USO contract with USP
	4. Other	(see Notes below)
32. RG5Auth	• Government authority adopting this legislation? (select one)	
	1. NRA	National regulatory authority
	2. MinPost	Minister responsible for postal sector
	3. MinOther	Minister other than the minister responsible for post
	4. Ombud	Public ombudsman
	5. PM	Prime Minister
	6. Council	Council of Ministers
	7. Parl	Parliament
	8. Court	Courts of law
	9. None	Authority not clearly defined
	10. Other	(see Notes below)
33. RG5Status	• Status of this legislation? (select one)	
	1. In effect	In effect
	2. Pending	Substantially completed but not in effect
	3. Other	Other - use Explanatory Notes
34. RG5Scope	• Subjects covered by this legislation (multi-select)	
	1. US	Definition of universal service
	2. Access	Access conditions to universal service
	3. ResArea	Scope of reserved area
	4. AuthGen	Authorisation for postal operators outside univ. serv.
	5. AuthUS	Authorisation for postal operators within univ. serv.

102RG

	6. USF	Universal service fund
	7. Acct	Accounting rules for the USP
	8. Price	Price regulations
	9. QoS	USP quality of service targets or monitoring
	10. Compl	User complaints and redress
	11. NRA	Organization and proceedings of NRA
	12. Other	Other issues - use Explanatory Notes
35. RG5En	• Is there an English translation of this legislation? (yes/no)	
36. RG6Name	Name of sixth major secondary postal legislation (if any)? (text)	
37. RG6Date	• Date of adoption of this secondary postal legislation?	
38. RG6Type	• Type of secondary postal legislation? (select one)	
	1. Reg	Regulation, decree, ordinance, or instruction
	2. License	USO license condition
	3. Con	USO contract with USP
	4. Other	(see Notes below)
39. RG6Auth	• Government authority adopting this legislation? (select one)	
	1. NRA	National regulatory authority
	2. MinPost	Minister responsible for postal sector
	3. MinOther	Minister other than the minister responsible for post
	4. Ombud	Public ombudsman
	5. PM	Prime Minister
	6. Council	Council of Ministers
	7. Parl	Parliament
	8. Court	Courts of law
	9. None	Authority not clearly defined
	10. Other	(see Notes below)
40. RG6Status	• Status of this legislation? (select one)	
	1. In effect	In effect
	2. Pending	Substantially completed but not in effect
	3. Other	Other - use Explanatory Notes
41. RG6Scope	• Subjects covered by this legislation (multi-select)	
	1. US	Definition of universal service
	2. Access	Access conditions to universal service
	3. ResArea	Scope of reserved area
	4. AuthGen	Authorisation for postal operators outside univ. serv.
	5. AuthUS	Authorisation for postal operators within univ. serv.
	6. USF	Universal service fund
	7. Acct	Accounting rules for the USP
	8. Price	Price regulations
	9. QoS	USP quality of service targets or monitoring
	10. Compl	User complaints and redress
	11. NRA	Organization and proceedings of NRA
	12. Other	Other issues - use Explanatory Notes
42. RG6En	• Is there an English translation of this legislation? (yes/no)	

102RG

---

43. RGMORE Are there additional significant items of secondary postal legislation? (yes/no)

---

44. RGNOTES Explanatory Notes: please include the number of questions referred to.

211RF

**Question Module: 211RF Regulatory framework**

1. RFMin	What is the name of the postal ministry, i.e., the ministry with primary responsibility for postal policy? (text 100)
2. RFUsp	What is the name(s) of universal service provider(s)? (text 100)
3. RFUspStat	What was the legal status of the USP at the end of 2003? (select one) <ol style="list-style-type: none"> <li>1. Gov dpt      Government department</li> <li>2. State enterp      State enterprise</li> <li>3. Plc      Public limited company</li> <li>4. Other      (see Notes below)</li> </ol>
4. RFUspOwn	Please state the share of government ownership in the USP at the end of 2003. (percent)
5. RFUspDir	If the USP is owned by the government, entirely or in parts, who appoints directors of the USP on behalf of the government - or represents the government in a supervisory board that appoints USP directors? (select one) <ol style="list-style-type: none"> <li>1. NRA      National regulatory authority</li> <li>2. MinPost      Minister responsible for postal sector</li> <li>3. MinOther      Minister other than the minister responsible for post</li> <li>4. Ombud      Public ombudsman</li> <li>5. PM      Prime Minister</li> <li>6. Council      Council of Ministers</li> <li>7. Parl      Parliament</li> <li>8. Court      Courts of law</li> <li>9. None      Authority not clearly defined</li> <li>10. Other      (see Notes below)</li> </ol>
6. RFNra	What is the name of national regulatory authority for the postal sector? (text 100)
7. RFNraBeg	When was the NRA vested with authority to regulate postal services? (date)
8. RFNraJur	What non-postal sectors does the NRA regulate, if any? (multi-select) <ol style="list-style-type: none"> <li>1. None      None</li> <li>2. Telcomm      Telecommunications</li> <li>3. Energy      Energy</li> <li>4. Water      Water</li> <li>5. Gas      Gas</li> <li>6. Rail      Railway</li> <li>7. Other      (see Notes below)</li> </ol>
9. RFNraNum	How many persons comprise the head (decision making body) of the NRA? (select one) <ol style="list-style-type: none"> <li>1. 1      Single director of NRA</li> <li>2. 2      Two person board</li> <li>3. 3      Three person board</li> <li>4. 4      Four person board</li> <li>5. 5      Five person board</li> <li>6. More      Board composed of more than 5 persons</li> </ol>



211RF

10. RFNraAppt	Which government body appoints the head (or members of the head) of the NRA (select one)
	<ul style="list-style-type: none"> <li>1. NRA National regulatory authority</li> <li>2. MinPost Minister responsible for postal sector</li> <li>3. MinOther Minister other than the minister responsible for post</li> <li>4. Ombud Public ombudsman</li> <li>5. PM Prime Minister</li> <li>6. Council Council of Ministers</li> <li>7. Parl Parliament</li> <li>8. Court Courts of law</li> <li>9. None Authority not clearly defined</li> <li>10. Other (see Notes below)</li> </ul>
11. RFNraTerm	What is the term of service of the head (or members of the head) of the NRA? (select one)
	<ul style="list-style-type: none"> <li>1. None No fixed term</li> <li>2. 1 1 year</li> <li>3. 2 2 years</li> <li>4. 3 3 years</li> <li>5. 4 4 years</li> <li>6. 5 5 years</li> <li>7. More More than 5 years</li> </ul>
12. RFNraDism	On what grounds can the head of the NRA (or members of the head) be dismissed? (select one)
	<ul style="list-style-type: none"> <li>1. None No specific criteria for dismissal</li> <li>2. Discetion Discretion of the authority appointing head</li> <li>3. Cause Misconduct in office or illegal activities</li> <li>4. Other (see Notes below)</li> </ul>
13. RFNraBldg	Are the offices of the NRA in the same building as those of the postal ministry (yes/no)
14. RFNraFin	How is the NRA financed? (multi-select)
	<ul style="list-style-type: none"> <li>1. Govt General government budget</li> <li>2. MinPost Funds from ministry responsible for postal sector</li> <li>3. USP Funds from universal service provider</li> <li>4. License Fees charged authorised operators</li> <li>5. Other (see Notes below)</li> </ul>
15. RFNraBudget	Which government body approves budget of the NRA? (select one)
	<ul style="list-style-type: none"> <li>1. NRA National regulatory authority</li> <li>2. MinPost Minister responsible for postal sector</li> <li>3. MinOther Minister other than the minister responsible for post</li> <li>4. Ombud Public ombudsman</li> <li>5. PM Prime Minister</li> <li>6. Council Council of Ministers</li> <li>7. Parl Parliament</li> <li>8. Court Courts of law</li> <li>9. None Authority not clearly defined</li> <li>10. Other (see Notes below)</li> </ul>
16. RFNraEnf	What enforcement powers does the NRA exercise? (multi-select)
	<ul style="list-style-type: none"> <li>1. Fine Levy fines</li> <li>2. PrSet Establish new tariff at lawful levels</li> <li>3. PrCancel Invalidate unlawful tariffs</li> </ul>

211RF

	4. AcSet	Require USP to provide access to downstream services
	5. InfoReq	Require USP to disclose information
	6. InfoSet	Require USP to gather new information
	7. AcctSet	Require UPS to maintain accounting standards
	8. InfoCpo	Require competitive operators to disclose information
	9. JudEnf	Seek judicial enforcement of administrative orders
	10. Other	(see Notes below)
17. RFNraAppl	To which government body, if any, are NRA decisions appealed for review? (select one)	
	1. NRA	National regulatory authority
	2. MinPost	Minister responsible for postal sector
	3. MinOther	Minister other than the minister responsible for post
	4. Ombud	Public ombudsman
	5. PM	Prime Minister
	6. Council	Council of Ministers
	7. Parl	Parliament
	8. Court	Courts of law
	9. None	Authority not clearly defined
	10. Other	(see Notes below)
18. RFWhoUsFrq	Which government body defines the basic characteristics of universal service such as frequency of service and access density? (select one)	
	1. NRA	National regulatory authority
	2. MinPost	Minister responsible for postal sector
	3. MinOther	Minister other than the minister responsible for post
	4. Ombud	Public ombudsman
	5. PM	Prime Minister
	6. Council	Council of Ministers
	7. Parl	Parliament
	8. Court	Courts of law
	9. None	Authority not clearly defined
	10. Other	(see Notes below)
19. RFWhoUsWt	Which government body determines the maximum weight of parcels within the universal service? (select one)	
	1. NRA	National regulatory authority
	2. MinPost	Minister responsible for postal sector
	3. MinOther	Minister other than the minister responsible for post
	4. Ombud	Public ombudsman
	5. PM	Prime Minister
	6. Council	Council of Ministers
	7. Parl	Parliament
	8. Court	Courts of law
	9. None	Authority not clearly defined
	10. Other	(see Notes below)
20. RFWhoUsInfo	Which government body ensures that users are given up-to-date information about universal service? (select one)	
	1. NRA	National regulatory authority
	2. MinPost	Minister responsible for postal sector
	3. MinOther	Minister other than the minister responsible for post
	4. Ombud	Public ombudsman
	5. PM	Prime Minister
	6. Council	Council of Ministers
	7. Parl	Parliament

211RF

	8. Court	Courts of law
	9. None	Authority not clearly defined
	10. Other	(see Notes below)
21. RFWhoRa	Which government body determines the scope of the reserved area is necessary to ensure maintenance of universal service? (select one)	
	1. NRA	National regulatory authority
	2. MinPost	Minister responsible for postal sector
	3. MinOther	Minister other than the minister responsible for post
	4. Ombud	Public ombudsman
	5. PM	Prime Minister
	6. Council	Council of Ministers
	7. Parl	Parliament
	8. Court	Courts of law
	9. None	Authority not clearly defined
	10. Other	(see Notes below)
22. RFWhoGaNeed	Which government body determines whether general authorisations are required for services outside the universal service to guarantee compliance with essential requirements? (select one)	
	1. NRA	National regulatory authority
	2. MinPost	Minister responsible for postal sector
	3. MinOther	Minister other than the minister responsible for post
	4. Ombud	Public ombudsman
	5. PM	Prime Minister
	6. Council	Council of Ministers
	7. Parl	Parliament
	8. Court	Courts of law
	9. None	Authority not clearly defined
	10. Other	(see Notes below)
23. RFWhoGaProc	Which government body determines the procedures for obtaining a general authorisation, if any, for service outside the universal service? (select one)	
	1. NRA	National regulatory authority
	2. MinPost	Minister responsible for postal sector
	3. MinOther	Minister other than the minister responsible for post
	4. Ombud	Public ombudsman
	5. PM	Prime Minister
	6. Council	Council of Ministers
	7. Parl	Parliament
	8. Court	Courts of law
	9. None	Authority not clearly defined
	10. Other	(see Notes below)
24. RFWhoLicNeed	Which government body determines authorisations are required for services within the universal service to guarantee compliance with essential requirements and to safeguard the universal service? (select one)	
	1. NRA	National regulatory authority
	2. MinPost	Minister responsible for postal sector
	3. MinOther	Minister other than the minister responsible for post
	4. Ombud	Public ombudsman
	5. PM	Prime Minister
	6. Council	Council of Ministers
	7. Parl	Parliament
	8. Court	Courts of law

211RF

	9. None	Authority not clearly defined
	10. Other	(see Notes below)
25. RFWhoLicProc	Which government body determines the procedures for obtaining a general authorisation or licence, if any, for services within the universal service? (select one)	
	1. NRA	National regulatory authority
	2. MinPost	Minister responsible for postal sector
	3. MinOther	Minister other than the minister responsible for post
	4. Ombud	Public ombudsman
	5. PM	Prime Minister
	6. Council	Council of Ministers
	7. Parl	Parliament
	8. Court	Courts of law
	9. None	Authority not clearly defined
	10. Other	(see Notes below)
26. RFWhoPr	Which government body ensures that tariffs for universal services are affordable and geared to costs? (select one)	
	1. NRA	National regulatory authority
	2. MinPost	Minister responsible for postal sector
	3. MinOther	Minister other than the minister responsible for post
	4. Ombud	Public ombudsman
	5. PM	Prime Minister
	6. Council	Council of Ministers
	7. Parl	Parliament
	8. Court	Courts of law
	9. None	Authority not clearly defined
	10. Other	(see Notes below)
27. RFWhoPrSp	Which government body ensures that special tariffs of the USP are transparent and nondiscriminatory? (select one)	
	1. NRA	National regulatory authority
	2. MinPost	Minister responsible for postal sector
	3. MinOther	Minister other than the minister responsible for post
	4. Ombud	Public ombudsman
	5. PM	Prime Minister
	6. Council	Council of Ministers
	7. Parl	Parliament
	8. Court	Courts of law
	9. None	Authority not clearly defined
	10. Other	(see Notes below)
28. RFWhoCs	Which government body ensures that cross subsidisation of universal service outside the reserved is prohibited except when strictly necessary? (select one)	
	1. NRA	National regulatory authority
	2. MinPost	Minister responsible for postal sector
	3. MinOther	Minister other than the minister responsible for post
	4. Ombud	Public ombudsman
	5. PM	Prime Minister
	6. Council	Council of Ministers
	7. Parl	Parliament
	8. Court	Courts of law
	9. None	Authority not clearly defined
	10. Other	(see Notes below)

211RF

29. RFWhoAcct	Which government body ensures that the accounting of USPs is in accordance with the Postal Directive? (select one)
	<ul style="list-style-type: none"> <li>1. NRA National regulatory authority</li> <li>2. MinPost Minister responsible for postal sector</li> <li>3. MinOther Minister other than the minister responsible for post</li> <li>4. Ombud Public ombudsman</li> <li>5. PM Prime Minister</li> <li>6. Council Council of Ministers</li> <li>7. Parl Parliament</li> <li>8. Court Courts of law</li> <li>9. None Authority not clearly defined</li> <li>10. Other (see Notes below)</li> </ul>
30. RFWhoQos	Which government body establishes quality of service standards? (select one)
	<ul style="list-style-type: none"> <li>1. NRA National regulatory authority</li> <li>2. MinPost Minister responsible for postal sector</li> <li>3. MinOther Minister other than the minister responsible for post</li> <li>4. Ombud Public ombudsman</li> <li>5. PM Prime Minister</li> <li>6. Council Council of Ministers</li> <li>7. Parl Parliament</li> <li>8. Court Courts of law</li> <li>9. None Authority not clearly defined</li> <li>10. Other (see Notes below)</li> </ul>
31. RFWhoQosInd	Which government body ensures that independent performance monitoring of quality of service is provided? (select one)
	<ul style="list-style-type: none"> <li>1. NRA National regulatory authority</li> <li>2. MinPost Minister responsible for postal sector</li> <li>3. MinOther Minister other than the minister responsible for post</li> <li>4. Ombud Public ombudsman</li> <li>5. PM Prime Minister</li> <li>6. Council Council of Ministers</li> <li>7. Parl Parliament</li> <li>8. Court Courts of law</li> <li>9. None Authority not clearly defined</li> <li>10. Other (see Notes below)</li> </ul>
32. RFWhoCr	Which government body ensures that transparent, simple, and inexpensive procedures are drawn up for dealing with users complaints? (select one)
	<ul style="list-style-type: none"> <li>1. NRA National regulatory authority</li> <li>2. MinPost Minister responsible for postal sector</li> <li>3. MinOther Minister other than the minister responsible for post</li> <li>4. Ombud Public ombudsman</li> <li>5. PM Prime Minister</li> <li>6. Council Council of Ministers</li> <li>7. Parl Parliament</li> <li>8. Court Courts of law</li> <li>9. None Authority not clearly defined</li> <li>10. Other (see Notes below)</li> </ul>
33. RFLegUs	Please identify the specific legal provisions that define universal service. (text 100)

211RF

---

34.	RFLegUsp	Please identify the specific legal provisions that designate a postal operator as the USP. (text 100)
35.	RFLegRes	Please identify the specific legal provisions that define the reserved area. (text 100)
36.	RFLegQos	Please identify the specific legal provisions that establish quality of service targets. (text 100)
37.	RFLegAcs	Please identify the specific legal provisions that define minimum access conditions for the public postal network. (text 100)
38.	RFLegAcct	Please identify the specific legal provisions that require separate accounts for reserved and universal postal services. (text 100)
39.	RFLegPreg	Please identify the specific legal provisions that ensure postal tariffs for universal service are affordable and geared to cost. (text 100)
40.	RFLegCpl	Please identify the specific legal provisions that regulate handling of complaints and redress procedures. (text 100)
41.	RFLegNra	Please identify the specific legal provisions that establish the NRA and define its role in the postal sector. (text 100)
42.	RFnotes	Explanatory Notes: please include the number of questions referred to.

---

212US

**Question Module: 212US Universal service**

1. USWtDom	Weight limit (in kg) for domestic parcels in universal service? (select one)
	<ul style="list-style-type: none"> <li>1. 10            10 kg</li> <li>2. 15            15 kg</li> <li>3. 20            20 kg</li> <li>4. Other        (see Notes below)</li> </ul>
2. USWtCbi	Weight limit (in kg) for inbound cross border parcels in universal service? (select one)
	<ul style="list-style-type: none"> <li>1. 10            10 kg</li> <li>2. 15            15 kg</li> <li>3. 20            20 kg</li> <li>4. Other        (see Notes below)</li> </ul>
3. USScope	Which of the following services are included in universal service? (multi-select)
	<ul style="list-style-type: none"> <li>1. BulkDM      Bulk direct mail</li> <li>2. RgtLP        Registered letter service</li> <li>3. InsLP        Insured letter service</li> <li>4. RgtCP        Registered parcel service</li> <li>5. InsCP        Insured parcel service</li> <li>6. Other        (see Notes below)</li> </ul>
4. USDelCp	Does universal service include home delivery of parcels? (select one)
	<ul style="list-style-type: none"> <li>1. Yes            Universal home delivery without charge</li> <li>2. Charge        Delivery to postal outlet; home delivery at extra charge</li> <li>3. ChargeX      Standard home delivery, but extra charge at some places</li> <li>4. No            Parcel delivery unavailable in some places</li> </ul>
5. USVat	Which postal services, if any, are exempt from VAT? (select one)
	<ul style="list-style-type: none"> <li>1. None          No VAT exemption</li> <li>2. Reserved     Reserved services exempted</li> <li>3. US            Universal services exempted</li> <li>4. USP          All services of USP exempted</li> <li>5. Other        (see Notes below)</li> </ul>
6. USVatRate	For postal services not exempted from VAT, if any, what is the VAT rate? (percent)
	.
7. USDelFrq	How many days of delivery per week were legally required for universal service? (select one)
	<ul style="list-style-type: none"> <li>1. 5              5 days per week</li> <li>2. 6              6 days per week</li> <li>3. Not def        Not clearly defined (explain in notes at end)</li> <li>4. Other        (see Notes below)</li> </ul>
8. USDelExc	Are there any regions where delivery is not provided at standard frequency? (yes/no)
	.
9. USDelExcPop	• If yes, approximate percentage of population receiving universal service less frequent than the standard? (percent)
	.
10. USDelExcReas	• If yes, briefly state the actual delivery frequency in these regions and the reasons. (e.g. inaccessible area, no daily ferry connections, etc.) (text 250)
	.

212US

11.	USCollbFrq	How many days of collection per week were legally required for universal service? (select one)
	1. 5	5 days per week
	2. 6	6 days per week
	3. 7	7 days per week
	4. Not def	Not clearly defined (explain in notes at end)
	5. Other	(see Notes below)
12.	USUniUvs	To what extent are uniform tariffs legally required for postal items within the universal service? (select one)
	1. No	Uniform tariffs not mandatory
	2. US	Mandatory for all universal services incl. parcels
	3. LP	Mandatory for letter post but not for parcels
	4. Res	Mandatory for reserved services
	5. Other	Other requirements - use Explanatory Notes
13.	USAff	Has the regulatory framework defined affordability of postal tariffs? (yes/no)
14.	USAffDef	• If yes, briefly describe the definition of affordability (text 250)
15.	USAffMeas	Does the NRA measure affordability? (yes/no)
16.	USAffNotes	• If yes, please explain the criteria used and provide reference to related documents, if any. (text 250)
17.	USnotes	Explanatory Notes: please include the number of questions referred to.



213AC

**Question Module: 213AC Access to universal service**

1. ACPoReq	What type of minimum standard, if any, is legally defined for the density of postal outlets? (multi-select) 1. None No specific minimum standard defined 2. MinNum Minimum total number of postal outlets 3. MaxDist Maximum distance to inhabitants (of populated areas) 4. Pop Outlet required in municipalities exceeding certain populat. 5. Other (see Notes below)
2. ACPoReqMet	Does the USP currently meet the standards concerning postal outlets? (yes/no)
3. ACPoAg	Is the USP legally restricted in replacing post offices by postal agencies? (yes/no)
4. ACPoAgNotes	• If so, explain the legal restrictions for replacing USP-owned post offices by postal agencies. (text 100)
5. ACLbReq	What type of minimum standard, if any, is legally defined for the density of collection letter boxes? (multi-select) 1. None No specific minimum standard defined 2. MinNum Minimum total number of postal outlets 3. MaxDist Maximum distance to inhabitants (of populated areas) 4. Pop Outlet required in municipalities exceeding certain populat. 5. Other (see Notes below)
6. ACLbReqMet	Does the USP currently meet the standards concerning collection letter boxes? (yes/no)
7. ACMon	Which institution monitors access conditions to the public postal network and assesses compliance with the minimum standards? (select one) 1. NRA National regulatory authority 2. MinPost Minister responsible for postal sector 3. MinOther Minister other than the minister responsible for post 4. Ombud Public ombudsman 5. None Authority not clearly defined 6. Other (see Notes below)
8. ACAcsAdb	Is the USP obliged to grant access to its address databases to other postal operators? (yes/no)
9. ACAcsPob	Do other postal operators have the right to deliver postal items to PO boxes operated by the USP? (yes/no)
10. ACNotes	Explanatory Notes: please include the number of questions referred to.

214RA

**Question Module: 214RA Reserved area**

1. RARes	Are any postal services reserved for the USP? (yes/no) IF "NO", SKIP REMAINDER OF QUESTIONS.
2. RALocDom	Are postal services for domestic correspondence reserved for the USP? (yes/no)
3. RALocDomWt	<ul style="list-style-type: none"> <li>• If yes, what is the maximum weight of items whose carriage is reserved? (select one)</li> <li>1. 50            50 grams</li> <li>2. 100          100 grams</li> <li>3. 350          350 grams</li> <li>4. Other        Other weight limit - use Explanatory Notes.</li> <li>5. None        No weight limit</li> </ul>
4. RALocDomPr	<ul style="list-style-type: none"> <li>• If yes, what is the maximum price of services within the reserved area? (select one - see instructions)</li> <li>1. 2.5           2.5 times public tariff for lowest weight in FSC</li> <li>2. 3             3 times public tariff for lowest weight in FSC</li> <li>3. 5             5 times public tariff for lowest weight in FSC</li> <li>4. None        No price limit</li> <li>5. Other        Other price limit - use Explanatory Notes.</li> </ul>
5. RALocDomVat	<ul style="list-style-type: none"> <li>In your view, how does the price limit relate to VAT, if at all? (select one)</li> <li>1. NP            No position</li> <li>2. Incl          Price limit is multiple of tariff including VAT</li> <li>3. Excl         Price limit is multiple of tariff excluding VAT</li> </ul>
6. RALocCbi	<ul style="list-style-type: none"> <li>Are postal services for inbound cross border correspondence reserved for the USP? (select one - see instructions)</li> <li>1. Yes           Yes, same as for domestic correspondence</li> <li>2. Different    Yes, but differs from domestic - use Explanatory Notes</li> <li>3. None        No reserved area for inbound cross border mail</li> </ul>
7. RADm	<ul style="list-style-type: none"> <li>Are postal services for domestic and inbound cross border direct mail reserved for the USP? (select one - see instructions)</li> <li>1. Yes           Yes: same as for correspondence</li> <li>2. Different    Yes, but differs from correspondence - use Explanatory Notes</li> <li>3. None        No reserved area for direct mail</li> </ul>
8. RACbo	<ul style="list-style-type: none"> <li>Are postal services for outbound cross border mail reserved for the USP? (select one - see instructions)</li> <li>1. Yes           Yes, same as for domestic correspondence</li> <li>2. Different    Yes, but differs from domestic corr. - use Explanatory Notes</li> <li>3. No            No, outbound mail not reserved</li> </ul>
9. RACboPol	<ul style="list-style-type: none"> <li>• If yes, what is the specific policy justification? (select one - see instructions)</li> <li>1. Liberal        Certain sectors already liberalised</li> <li>2. Specific      Specific characteristics of Member State</li> <li>3. Other        (see Notes below)</li> </ul>
10. RAEco	Is there an economic study relating the extent of the reserved area to maintenance of universal service? (yes/no)

214RA

---

11. RAEco2	• If yes, provide title(s) and date(s) of any study(ies) (text 250)
12. RADx	Are document exchange services reserved for the USP? (yes/no)
13. RABulk	Are bulk mail services exempt from the reserved area in whole or in part? (yes/no - see instructions)
14. RAUpstream	Is collection, sorting, and transport of mail exempt from the reserved area in whole or in part? (yes/no - see instructions)
15. RASpec	Are special services distinct from the universal service specifically exempt from the reserved area (yes/no - see instructions)
16. RAOthExcept	Has your country adopted other significant exceptions to the postal monopoly? (yes/no)
17. RANotes	Explanatory Notes: please include the number of questions referred to.

---

215AL

## Question Module: 215AL Authorisation and Licencing

1. ALNuvsScope	<p>What non-universal postal services, if any, require an authorisation? (select one)</p> <ol style="list-style-type: none"> <li>1. None No authorisation required for any services</li> <li>2. All Authorisation required for all services</li> <li>3. NonEx Authorisation required for all services except express</li> <li>4. Other (see Notes below)</li> </ol>
2. ALNuvsAuth	<p>• If an authorisation is required, what type is it? (select one)</p> <ol style="list-style-type: none"> <li>1. GA General authorisation</li> <li>2. License Individual license</li> <li>3. Other (see Notes below)</li> </ol>
3. ALNuvsInst	<p>• If an authorisation is required, which body grants such authorisation? (select one)</p> <ol style="list-style-type: none"> <li>1. NRA National regulatory authority</li> <li>2. MinPost Minister responsible for postal sector</li> <li>3. MinOther Minister other than the minister responsible for post</li> <li>4. Ombud Public ombudsman</li> <li>5. PM Prime Minister</li> <li>6. Council Council of Ministers</li> <li>7. Parl Parliament</li> <li>8. Court Courts of law</li> <li>9. None Authority not clearly defined</li> <li>10. Other (see Notes below)</li> </ol>
4. ALNuvsCon	<p>• If an authorisation is required, what types of requirements must the operator fulfill? (multi-select)</p> <ol style="list-style-type: none"> <li>1. Confid Confidentiality of correspondence</li> <li>2. Danger Restrictions on dangerous goods</li> <li>3. Data Data protection requirements</li> <li>4. Environ Environmental protection requirements</li> <li>5. Finance Minimal capital or financial guarantees</li> <li>6. Tech Technical or operational competence</li> <li>7. USO Universal service obligation similar to USP</li> <li>8. Service Quality, availability, performance, or price of services</li> <li>9. RA Non-infringement of reserved area of USP</li> <li>10. USF Contribution to universal service fund</li> <li>11. Other (see Notes below)</li> </ol>
5. ALNuvsDec	<p>• If an authorisation is required, may the operator begin service without an explicit decision by the government? (yes/no)</p>
6. ALNuvsPer	<p>• If an authorisation is required, is the period of validity of the authorisation limited? (select one)</p> <ol style="list-style-type: none"> <li>1. No limit No time limit on period of validity</li> <li>2. Limited Valid for fixed number of years</li> <li>3. Other (see Notes below)</li> </ol>
7. ALNuvsFee1	<p>• If a licence is required, what handling fee, if any, is charged the licensee once? (select one)</p> <ol style="list-style-type: none"> <li>1. None No fee</li> <li>2. &lt;100 100 Euros or less</li> <li>3. &lt;1000 1000 Euros or less</li> </ol>

215AL

	4. >1000	More than 1000 Euro
	5. Other	(see Notes below)
8. ALNuvsFee	• If an authorisation is required, what annual fee, if any, is charged the operator? (select one)	
	1. None	No fee
	2. <100	100 Euros or less
	3. <1000	1000 Euros or less
	4. >1000	More than 1000 Euro
	5. Other	(see Notes below)
9. ALNuvsEq	• If an authorisation is required, does the same procedure apply to the USP and other operators? (yes/no)	
10. ALUvsGAScope	In the universal service, what services, if any, are authorised by general authorisation? (select one)	
	1. None	General authorisation not used for univ. servs.
	2. NonLic	All universal services outside licensed area
	3. NonRes	All universal services outside reserved area
	4. All	General authorisation applies to all univ. servs.
	5. Other	(see Notes below)
11. ALUvsGASame	• If a general authorisation is used, is it the same as issued for non-universal services? (yes/no)	
12. ALUvsLicScope	In the universal service, carriage of what postal items, if any, is authorised by individual licence? (select one)	
	1. None	Licenses not used for universal services
	2. Cor	Correspondence only
	3. CorDm	Correspondence and direct mail only
	4. LP	All letter post items including periodicals
	5. All	All universal services including parcels
	6. Other	(see Notes below)
13. ALUvsLicWt	• If a licence is required, what is the weight limit, if any, on postal items covered (select one)	
	1. None	No limit
	2. 2000	2 kilograms
	3. 1000	1 kilogram
	4. 500	500 grams
	5. 350	350 grams
	6. 100	100 grams
14. ALUvsLicPr	• If a licence is required, what is the price limit, if any, on postal items covered (select one)	
	1. None	No price limit applies
	2. 2.5	2.5 times public tariff for lowest weight in FSC
	3. 3x	3 times public tariff for lowest weight in FSC
	4. 5x	5 times public tariff for lowest weight in FSC
	5. Fixed	Fixed amount - use Explanatory Notes
	6. Other	Other price limit - use Explanatory Notes
15. ALUvsInst	• If a licence is required, which body grants such licence? (select one)	
	1. NRA	National regulatory authority
	2. MinPost	Minister responsible for postal sector
	3. MinOther	Minister other than the minister responsible for post

215AL

	4. Ombud	Public ombudsman
	5. PM	Prime Minister
	6. Council	Council of Ministers
	7. Parl	Parliament
	8. Court	Courts of law
	9. None	Authority not clearly defined
	10. Other	(see Notes below)
16. ALUvsCon	• If a licence is required, what types of requirements must the licensee fulfill? (multi-select)	
	1. Confid	Confidentiality of correspondence
	2. Danger	Restrictions on dangerous goods
	3. Data	Data protection requirements
	4. Environ	Environmental protection requirements
	5. Finance	Minimal capital or financial guarantees
	6. Tech	Technical or operational competence
	7. USO	Universal service obligation similar to USP
	8. Service	Quality, availability, performance, or price of services
	9. RA	Non-infringement of reserved area of USP
	10. USF	Contribution to universal service fund
	11. Other	(see Notes below)
17. ALUvsPer	• If a licence is required, what is the period of validity of the licence? (select one)	
	1. Unlimited	No time limit on license
	2. 5	5 years
	3. 4	4 years
	4. 3	3 years
	5. Other	(see Notes below)
18. ALUvsLicFee1	• If a licence is required, what handling fee, if any, is charged the licensee once? (select one)	
	1. None	No fee
	2. <100	100 Euros or less
	3. <1000	1000 Euros or less
	4. >1000	More than 1000 Euro
	5. Other	(see Notes below)
19. ALUvsLicFee	• If a licence is required, what annual fee, if any, is charged the licensee? (select one)	
	1. None	No fee
	2. <100	100 Euros or less
	3. <1000	1000 Euros or less
	4. >1000	More than 1000 Euro
	5. Other	(see Notes below)
20. ALUvsLicEq	• If a licence is required, does the same procedure apply to the USP and other operators? (yes/no)	
21. ALUsfAuth	Is the NRA or any other government body authorised to establish a universal service fund? (yes/no)	
22. ALUsfAuthNam	• If yes, which body decides on establishment of a universal service fund? (select one)	
	1. NRA	National regulatory authority
	2. MinPost	Minister responsible for postal sector
	3. MinOther	Minister other than the minister responsible for post
	4. Ombud	Public ombudsman

215AL

- 5. PM Prime Minister
- 6. Council Council of Ministers
- 7. Parl Parliament
- 8. Court Courts of law
- 9. None Authority not clearly defined
- 10. Other (see Notes below)

---

23. ALUsfExist Has a universal service compensation fund been established in fact? (yes/no)

---

24. ALNotes Explanatory Notes: please include the number of questions referred to.

216AS

**Question Module: 216AS Transparency of accounts**

1. ASReq	Does your legislation set out requirements concerning the transparency of accounts? (yes/no)
2. ASReqUvs	Is the USP obliged to have separate accounts for universal and non-universal services? (yes/no)
3. ASReqRes	Is the USP obliged to have separate accounts for reserved and non-reserved services? (yes/no)
4. ASCalDir	Does the USP allocate costs according to the system set out in Article 14(3) of the Postal Directive? (yes/no)
5. ASCalOth	Does the USP allocate costs according to another cost accounting system? (yes/no)
6. ASCalApplnst	Which institution verifies compliance of the USP's cost accounting systems with the Postal Directive? (select one) 1. NRA National regulatory authority 2. MinPost Minister responsible for postal sector 3. MinOther Minister other than the minister responsible for post 4. Ombud Public ombudsman 5. PM Prime Minister 6. Council Council of Ministers 7. Parl Parliament 8. Court Courts of law 9. None Authority not clearly defined 10. Other (see Notes below)
7. ASCalAppYlast	When was the USP's accounting system approved the last time? (select one, e.g. click "2002" if the 2002 accounts had been approved in 2003) 1. 2003 2003 2. 2002 2002 3. 2001 2001 4. 2000 2000 5. before00 Before 2000 6. Never Never so far
8. ASCalAppYfirst	When was the USP's accounting system approved the first time? (select one) 1. 2003 2003 2. 2002 2002 3. 2001 2001 4. 2000 2000 5. before00 Before 2000 6. Never Never so far
9. ASCalAppPub	Are the statements concerning compliance of the accounts with the Postal Directive published regularly? (yes/no)
10. ASNotes	Explanatory Notes: please include the number of questions referred to.



216AS

217PR

## Question Module: 217PR Price regulation

1. PRAnte	Which of the USP's services, if any, are subject to regulatory price approval before they take effect? (multi-select)
	<ul style="list-style-type: none"> <li>1. locSgl All single piece correspondence</li> <li>2. locSglRes Reserved single piece correspondence</li> <li>3. locBlk All bulk correspondence</li> <li>4. locBlkRes Reserved bulk correspondence</li> <li>5. Dm Bulk direct mail</li> <li>6. DmRes Reserved bulk direct mail</li> <li>7. CpSgl Parcels - single piece</li> <li>8. CpBlk Parcels - bulk</li> <li>9. Ex Express services</li> <li>10. Unaddr Unaddressed items</li> <li>11. Workshare Worksharing products</li> <li>12. Other Other services - use Explanatory Notes</li> </ul>
2. PRPc	Which of the USP's services, if any, are subject to price caps? (multi-select)
	<ul style="list-style-type: none"> <li>1. locSgl All single piece correspondence</li> <li>2. locSglRes Reserved single piece correspondence</li> <li>3. locBlk All bulk correspondence</li> <li>4. locBlkRes Reserved bulk correspondence</li> <li>5. Dm Bulk direct mail</li> <li>6. DmRes Reserved bulk direct mail</li> <li>7. CpSgl Parcels - single piece</li> <li>8. CpBlk Parcels - bulk</li> <li>9. Ex Express services</li> <li>10. Unaddr Unaddressed items</li> <li>11. Workshare Worksharing products</li> <li>12. Other Other services - use Explanatory Notes</li> </ul>
3. PRPcRate	• If a price cap is applied, what is the maximum permissible annual increase (e.g. retail price index minus 1.5%)? Please explain briefly (text 100)
4. PRPost	Which of the USP's services, if any, are subject to regulatory price review after they take effect? (multi-select)
	<ul style="list-style-type: none"> <li>1. locSgl All single piece correspondence</li> <li>2. locSglRes Reserved single piece correspondence</li> <li>3. locBlk All bulk correspondence</li> <li>4. locBlkRes Reserved bulk correspondence</li> <li>5. Dm Bulk direct mail</li> <li>6. DmRes Reserved bulk direct mail</li> <li>7. CpSgl Parcels - single piece</li> <li>8. CpBlk Parcels - bulk</li> <li>9. Ex Express services</li> <li>10. Unaddr Unaddressed items</li> <li>11. Workshare Worksharing products</li> <li>12. Other Other services - use Explanatory Notes</li> </ul>
5. PRBm	Which benchmark is legally implemented for regulating postal tariffs? (select one)
	<ul style="list-style-type: none"> <li>1. Actual costs Actual costs</li> </ul>

217PR

	2. LRIC	Efficient costs (e.g., LRIC)
	3. Other	Other benchmark - use Explanatory Notes
6. PRRcDate	When has the last general rate case been carried out? (select one)	
	1. 2004	2004
	2. 2003	2003
	3. 2002	2002
	4. 2001	2001
	5. 2000	2000
	6. 1999	1999
	7. 1998	1998
	8. before98	Before 1998
	9. never	Never so far
7. PRRcAuth	Had the last general rate case been decided by the same authority that currently is responsible for price regulation? (yes/no)	
8. PRRcAuth2	• If not, which authority had previously been responsible for price regulation? (text 100)	
9. PRBkloc	Does the USP offer discount rates for correspondence tendered in bulk? (yes/no)	
10. PRBklocType	• If so, what are the qualifications for discounts for bulk correspondence? (multi-select)	
	1. Vol	Volume of mailing only
	2. Work	Presorting and other mail preparation
	3. Trans	Transport to a sorting center or office near addressee
	4. Other	(see Notes below)
11. PRBklocMinAmt	• If so, what is the lowest level of discount (in percent) compared to standard retail service for correspondence? (percent)	
12. PRBklocMinNum	• If so, what is the minimum number of items of correspondence needed to qualify for a lowest level of discount?	
13. PRBklocMaxAmt	• If so, what is the highest level of discount (in percent) compared to standard retail service for correspondence? (percent)	
14. PRBklocMaxNum	• If so, what is the minimum number of items of correspondence needed to qualify for a highest level of discount?	
15. PRBklocAvc	• If so, are discounts for bulk correspondence based on avoided costs? (yes/no)	
16. PRBklocTrn	• If so, are discounts for bulk correspondence transparent and non-discriminatory? (yes/no)	
17. PRBklocPct	• If so, approximately what percent of correspondence is carried under a bulk rate? (percent)	
18. PRBklocCsl	• If so, are all bulk correspondence rates available to consolidators? (yes/no)	

217PR

19.	PRBlklocCpo	• If so, are all bulk correspondence rates available to competitive postal operators? (yes/no)
20.	PRBlkDm	Does the USP offer discount rates for direct mail tendered in bulk? (yes/no)
21.	PRBlkDmType	• If so, what are the qualifications for discounts for bulk direct mail? (multi-select) 1. Vol            Volume of mailing only 2. Work         Presorting and other mail preparation 3. Trans         Transport to a sorting center or office near addressee 4. Other         (see Notes below)
22.	PRBlkDmMinAmt	• If so, what is the lowest level of discount (in percent) compared to standard retail service for direct mail? (percent)
23.	PRBlkDmMinNum	• If so, what is the minimum number of items of direct mail needed to qualify for a lowest level of discount?
24.	PRBlkDmMaxAmt	• If so, what is the highest level of discount (in percent) compared to standard retail service for direct mail? (percent)
25.	PRBlkDmMaxNum	• If so, what is the minimum number of items of direct mail needed to qualify for a highest level of discount?
26.	PRBlkDmAvc	• If so, are discounts for bulk direct mail based on avoided costs? (yes/no)
27.	PRBlkDmTrn	• If so, are discounts for bulk direct mail transparent and non-discriminatory? (yes/no)
28.	PRBlkDmPct	• If so, approximately what percent of direct mail is carried under a bulk rate? (percent)
29.	PRBlkDmCsl	• If so, are all bulk direct mail rates available to consolidators? (yes/no)
30.	PRBlkDmCpo	• If so, are all bulk direct mail rates available to competitive postal operators? (yes/no)
31.	PRBlkCp	Does the USP offer discount rates for parcels tendered in bulk? (yes/no)
32.	PRBlkCpType	• If so, what are the qualifications for discounts for bulk parcels? (multi-select) 1. Vol            Volume of mailing only 2. Work         Presorting and other mail preparation 3. Trans         Transport to a sorting center or office near addressee 4. Other         (see Notes below)
33.	PRBlkCpMinAmt	• If so, what is the lowest level of discount (in percent) compared to standard retail service for parcels? (percent)
34.	PRBlkCpMinNum	• If so, what is the minimum number of items of parcels needed to qualify for a lowest level of discount?

217PR

---

35.	PRBlkCpMaxAmt	• If so, what is the highest level of discount (in percent) compared to standard retail service for parcels? (percent)
36.	PRBlkCpMaxNum	• If so, what is the minimum number of items of parcels needed to qualify for a highest level of discount?
37.	PRBlkCpAvc	• If so, are discounts for bulk parcels based on avoided costs? (yes/no)
38.	PRBlkCpTrn	• If so, are discounts for bulk parcels transparent and non-discriminatory? (yes/no)
39.	PRBlkCPRct	• If so, approximately what percent of parcels is carried under a bulk rate? (percent)
40.	PRBlkCpCsl	• If so, are all bulk parcels rates available to consolidators? (yes/no)
41.	PRBlkCpCpo	• If so, are all bulk parcels rates available to competitive postal operators? (yes/no)
42.	PRTdCpo	Are terminal dues rates offered to EU USPs also available to competitive postal operators? (yes/no)
43.	PROop	Are any postal services provided by other operators than the USP subject to regulatory approval? (yes/no)
44.	PROop2	• If yes, please explain. (text 250)
45.	PRnotes	Explanatory Notes: please include the number of questions referred to.

---

218QS

**Question Module: 218QS Quality of service**

1. QSServDom	For which of the following domestic postal services have regulatory transit time targets been set? (multi-select)
	<ul style="list-style-type: none"> <li>1. Dom1st Domestic priority mail</li> <li>2. Dom2nd Domestic non-priority mail</li> <li>3. DomParcel Domestic parcels</li> <li>4. CBprior Cross border priority mail</li> <li>5. Other (see Notes below)</li> </ul>
2. QSMeasServDom	For which of the following domestic postal services is transit time performance regularly measured regularly? (multi-select)
	<ul style="list-style-type: none"> <li>1. Dom1st Domestic priority mail</li> <li>2. Dom2nd Domestic non-priority mail</li> <li>3. DomParcel Domestic parcels</li> <li>4. CBprior Cross border priority mail</li> <li>5. Other (see Notes below)</li> </ul>
3. QSMeasFclDom	Who measures the domestic transit time of domestic priority mail? (select one)
	<ul style="list-style-type: none"> <li>1. USP USP</li> <li>2. NRA NRA</li> <li>3. IND Independent institution</li> <li>4. UNEX IPC - UNEX</li> <li>5. UNEXlite IPC - UNEX lite</li> <li>6. Other (see Notes below)</li> </ul>
4. QSAudDom	Is the measurement method audited by the NRA? (yes/no)
5. QSAudDomLast	When has the last audit been carried out? (select one)
	<ul style="list-style-type: none"> <li>1. 2004 2004</li> <li>2. 2003 2003</li> <li>3. 2002 2002</li> <li>4. 2001 2001</li> <li>5. before01 before 2001</li> <li>6. never Never so far</li> </ul>
6. QSCen	Does the current measurement method correspond to the adopted CEN-standard EN 13850? (yes/no)
7. QSCenYr	• If no, when will the measurement standard EN 13850 be implemented? (select one)
	<ul style="list-style-type: none"> <li>1. 2004 2004</li> <li>2. 2005 2005</li> <li>3. 2006 2006</li> <li>4. Later later than 2006</li> </ul>
8. QSRedrDom	What kind of penalties does the USP face for missing the domestic transit time targets? (select one)
	<ul style="list-style-type: none"> <li>1. None No penalty</li> <li>2. Fine General fine</li> <li>3. Comp Individual compensation</li> <li>4. Tariff Tariffs effected</li> </ul>

218QS

		5. Other (see Notes below)
9.	QSServCb	Is the transit time target of cross-border priority mail (FSC) set by the Postal Directive in force? (yes/no)
10.	QSServCbY	<ul style="list-style-type: none"> <li>• If no, when shall the cross-border transit time target come into force? (select one)</li> <li>1. 2004      2004</li> <li>2. 2005      2005</li> <li>3. 2006      2006</li> <li>4. Later      later than 2006</li> </ul>
11.	QSMeasServCb	• If yes, is the transit time of cross-border priority mail regularly measured? (yes/no)
12.	QSMeasFclCb	Who measures the transit time of cross-border priority mail? (select one) <ul style="list-style-type: none"> <li>1. IPC      IPC</li> <li>2. NRA      NRA</li> <li>3. USP      USP</li> <li>4. IND      Independent institution</li> <li>5. Other      (see Notes below)</li> </ul>
13.	QSAudCb	Is the measurement method for cross-border transit time audited? (yes/no)
14.	QSAudCblnst	• If yes, who audits the measurement method? (text 100)
15.	QSAudCbLast	<ul style="list-style-type: none"> <li>• If yes, when has the last audit been carried out? (select one)</li> <li>1. 2004      2004</li> <li>2. 2003      2003</li> <li>3. 2002      2002</li> <li>4. 2001      2001</li> <li>5. before01      before 2001</li> <li>6. never      Never so far</li> </ul>
16.	QSRedrCb	What kind of penalties does the USP face for missing the cross-border transit time targets? (select one) <ul style="list-style-type: none"> <li>1. None      No penalty</li> <li>2. REIMS      Reduced terminal dues according REIMS II</li> <li>3. Contract      Reduced terminal dues according to individual contract</li> <li>4. Other      (see Notes below)</li> </ul>
17.	QSnote	Explanatory Notes: please include the number of questions referred to.

219CR

**Question Module: 219CR Complaints and redress**

1. CRReqUs	Are simple and transparent complaint and redress procedures for postal universal services required by postal law? (yes/no)
2. CRFut	• If no, is it planned to implement a legal requirement for simple and transparent complaint and redress procedures? (yes/no)
3. CRFutY	• • If yes, please state the year of planned implementation. (select one) 1. 2004      2004 2. 2005      2005 3. 2006      2006 4. later2006      Later than 2006
4. CRUsp	Did the USP provide a specific office dedicated to the resolution of customer complaints? (yes/no)
5. CROth	Are there other institutions where complaints can be filed? (select one) 1. NRA      NRA 2. Ombud      Ombudsman 3. Other      (see Notes below)
6. CRApp	What institution is responsible for mediation if the complaints are not satisfactorily resolved by the USP? (select one) 1. NRA      NRA 2. Ombud      Ombudsman 3. Other      (see Notes below)
7. CRPubReqNum	Does legislation require regular publication of the number of customer complaints? (yes/no)
8. CRPubNum	In practice, is information about the number and type of complaints regularly published? (yes/no)
9. CRPubReqMan	Is it additionally required to publish the manner in which the complaints have been dealt with? (yes/no)
10. CRPubMan	In practice, is information published about the manner in which the complaints have been dealt with? (yes/no)
11. CRPubInst	What institution publishes the number of complaints and/or their treatment? (select one) 1. USP      USP 2. NRA      NRA 3. Ombud      Ombudsman 4. None      Authority not clearly defined 5. Other      (see Notes below)
12. CRCen	Has or will the CEN standard EN 14 012 (complaint and redress procedures) be implemented by the USP? (select one) 1. Already      Already implemented 2. 2004      2004



219CR

		3. 2005	2005
		4. 2006	2006
		5. 2006orLat	Later than 2006
13. CRReqNonUs	Are similar procedures legally required for postal services provided by operators other than the USP? (yes/no)		
14. CROplnst	• If so, what institution deals with complaints concerning postal services provided by operators other than the USP? (select one)		
		1. NRA	NRA
		2. Ombud	Ombudsman
		3. Other	(see Notes below)
15. CRnotes	Explanatory Notes: please include the number of questions referred to.		

221FD

**Question Module: 221FD Future development**

1. FDUso	Do you foresee changes in scope of universal service obligation before the end of 2006? (yes/no)
2. FDUsoDef	• If so, please describe the anticipated changes. (text 250)
3. FDRa	Do you foresee changes in the scope of the reserved area (if any) before the end of 2006? (yes/no)
4. FDRaDef	• If so, please describe the anticipated changes. (text 250)
5. FDPPr	Do you foresee changes in the scope of price regulation before the end of 2006? (yes/no)
6. FDPPrDef	• If so, please describe the anticipated changes. (text 250)
7. FDAc	Do you foresee changes in regulations defining access conditions for universal services before the end of 2006? (yes/no)
8. FDAcDef	• If so, please describe the anticipated changes. (text 250)
9. FDQos	Do you foresee changes in regulations defining the quality of universal services before the end of 2006? (yes/no)
10. FDQosDef	• If so, please describe the anticipated changes. (text 250)
11. FDPPerQosLp	Overall how has the quality of postal services for domestic letters changed over the last 5 years? (select one) 1. 5 Considerable improvement 2. 4 Improvement 3. 3 No change 4. 2 Worsening 5. 1 Considerable worsening 6. 0 No opinion
12. FDImpLpPast	Overall has the importance of postal services for letters increased or decreased over the last 5 years? (select one) 1. 5 Strong increase 2. 4 Slight increase 3. 3 No change 4. 2 Slight decrease 5. 1 Strong decrease 6. 0 No opinion
13. FDImpLpFut	Do you foresee an increase or a decrease in the importance of postal services for letters in the next five years? (select one) 1. 5 Strong increase

221FD

- |    |   |                 |
|----|---|-----------------|
| 2. | 4 | Slight increase |
| 3. | 3 | No change       |
| 4. | 2 | Slight decrease |
| 5. | 1 | Strong decrease |
| 6. | 0 | No opinion      |

14. FDLp5yr

Assuming average economic growth, what is your best estimate for the volume of letters in 2008 compared to the volume in 2003? (select one)

- |     |     |        |
|-----|-----|--------|
| 1.  | -60 | - 60%  |
| 2.  | -50 | - 50%  |
| 3.  | -40 | - 40%  |
| 4.  | -20 | - 20%  |
| 5.  | -15 | - 15%  |
| 6.  | -8  | - 8%   |
| 7.  | -4  | - 4%   |
| 8.  | 0   | +/- 0% |
| 9.  | 4   | + 4%   |
| 10. | 8   | + 8%   |
| 11. | 15  | + 15%  |
| 12. | 20  | + 20%  |
| 13. | 30  | + 30%  |
| 14. | 40  | + 40%  |
| 15. | 50  | + 50%  |
| 16. | 75  | + 75%  |
| 17. | 100 | + 100% |

15. FDLp10yr

Assuming average economic growth, what is your best estimate for the volume of letters in 2013 compared to the volume in 2003? (select one)

- |     |     |        |
|-----|-----|--------|
| 1.  | -60 | - 60%  |
| 2.  | -50 | - 50%  |
| 3.  | -40 | - 40%  |
| 4.  | -20 | - 20%  |
| 5.  | -15 | - 15%  |
| 6.  | -8  | - 8%   |
| 7.  | -4  | - 4%   |
| 8.  | 0   | +/- 0% |
| 9.  | 4   | + 4%   |
| 10. | 8   | + 8%   |
| 11. | 15  | + 15%  |
| 12. | 20  | + 20%  |
| 13. | 30  | + 30%  |
| 14. | 40  | + 40%  |
| 15. | 50  | + 50%  |
| 16. | 75  | + 75%  |
| 17. | 100 | + 100% |

16. FDImpDmPast

Overall has the importance of postal services for direct mail increased or decreased over the last 5 years? (select one)

- |    |   |                 |
|----|---|-----------------|
| 1. | 5 | Strong increase |
| 2. | 4 | Slight increase |
| 3. | 3 | No change       |
| 4. | 2 | Slight decrease |
| 5. | 1 | Strong decrease |
| 6. | 0 | No opinion      |

221FD

17. FDImpDmFut	Do you foresee an increase or a decrease in the importance of postal services for direct mail in the next five years? (select one)
	1. 5 Strong increase 2. 4 Slight increase 3. 3 No change 4. 2 Slight decrease 5. 1 Strong decrease 6. 0 No opinion
18. FDDm5yr	Assuming average economic growth, what is your best estimate for the volume of direct mail in 2008 compared to the volume in 2003? (select one)
	1. -60 - 60% 2. -50 - 50% 3. -40 - 40% 4. -20 - 20% 5. -15 - 15% 6. -8 - 8% 7. -4 - 4% 8. 0 +/- 0% 9. 4 + 4% 10. 8 + 8% 11. 15 + 15% 12. 20 + 20% 13. 30 + 30% 14. 40 + 40% 15. 50 + 50% 16. 75 + 75% 17. 100 + 100%
19. FDDm10yr	Assuming average economic growth, what is your best estimate for the volume of direct mail in 2013 compared to the volume in 2003? (select one)
	1. -60 - 60% 2. -50 - 50% 3. -40 - 40% 4. -20 - 20% 5. -15 - 15% 6. -8 - 8% 7. -4 - 4% 8. 0 +/- 0% 9. 4 + 4% 10. 8 + 8% 11. 15 + 15% 12. 20 + 20% 13. 30 + 30% 14. 40 + 40% 15. 50 + 50% 16. 75 + 75% 17. 100 + 100%
20. FDUfFut	Assuming equal levels of efficiency, what course of future development for universal service appears to be best suited to your country? (select one)
	1. QoS low Less expensive, lower quality service 2. QoS same About the same price/quality mix 3. QoS hi More expensive, higher quality service

221FD

21. FDPeQosCp	How has the overall quality of domestic parcel services available in the market changed over the last 5 years? (select one)
1. 5	Considerable improvement
2. 4	Improvement
3. 3	No change
4. 2	Worsening
5. 1	Considerable worsening
6. 0	No opinion
22. FDImpCpPast	Overall how has the importance of postal services for domestic parcels changed over the last 5 years? (select one)
1. 5	Strong increase
2. 4	Slight increase
3. 3	No change
4. 2	Slight decrease
5. 1	Strong decrease
6. 0	No opinion
23. FDImpCpFut	Do you foresee an increase or a decrease in the importance of postal services for parcels in the next five years? (select one)
1. 5	Strong increase
2. 4	Slight increase
3. 3	No change
4. 2	Slight decrease
5. 1	Strong decrease
6. 0	No opinion
24. FDCp5yr	Assuming average economic growth, what is your best estimate for the volume of parcels in 2008 compared to the volume in 2003? (select one)
1. -60	- 60%
2. -50	- 50%
3. -40	- 40%
4. -20	- 20%
5. -15	- 15%
6. -8	- 8%
7. -4	- 4%
8. 0	+/- 0%
9. 4	+ 4%
10. 8	+ 8%
11. 15	+ 15%
12. 20	+ 20%
13. 30	+ 30%
14. 40	+ 40%
15. 50	+ 50%
16. 75	+ 75%
17. 100	+ 100%
25. FDCp10yr	Assuming average economic growth, what is your best estimate for the volume of parcels in 2013 compared to the volume in 2003? (select one)
1. -60	- 60%
2. -50	- 50%
3. -40	- 40%
4. -20	- 20%
5. -15	- 15%
6. -8	- 8%

221FD

7.	-4	- 4%
8.	0	+/- 0%
9.	4	+ 4%
10.	8	+ 8%
11.	15	+ 15%
12.	20	+ 20%
13.	30	+ 30%
14.	40	+ 40%
15.	50	+ 50%
16.	75	+ 75%
17.	100	+ 100%

---

26. FDPsBusFut Does your organisation expect that postal services would be more and more treated as normal business in the next 5 years? (yes/no)

---

27. FDPsComFut Does your organisation expect an increase or decrease in importance of postal services as means of communication (items of correspondence) in the next 5 years. (select one)

1.	5	Strong increase
2.	4	Slight increase
3.	3	No change
4.	2	Slight decrease
5.	1	Strong decrease
6.	0	No opinion

---

28. FDPsTransFut Does your organisation expect an increase or decrease in importance of postal services as means of distribution (advertising and parcels) in the next 5 years? (select one)

1.	5	Strong increase
2.	4	Slight increase
3.	3	No change
4.	2	Slight decrease
5.	1	Strong decrease
6.	0	No opinion

231CD

**Question Module: 231CD USP collection and delivery**

1. CDDelFrq	On how many days per week does the USP currently deliver? (select one) 1. 5 5 days per week 2. 6 6 days per week 3. Other (see Notes below)
2. CDdelFrqExc	Are there any regions where mail is delivered by the USP less frequently than in general? (yes/no)
3. CDdelFrqExcExpl	• If yes, please explain briefly. (text 100)
4. CDdelFrqExcShr	• If yes, please estimate the share of total population affected by less frequent delivery. (percent)
5. CDboxFrq	How often does the USP currently clear its collection letter boxes? (select one) 1. 5 5 days per week 2. 6 6 days per week 3. Other (see Notes below)
6. CDboxFrqExc	Are there any regions where collection letter boxes are cleared by the USP less frequently than in general? (yes/no)
7. CDboxFrqExcExpl	• If yes, please explain briefly. (text 100)
8. CDboxFrqExcShr	• If yes, please estimate the share of all collection letter boxes cleared at least once every working day. (percent)
9. CDLpColBoxShr	Please estimate the share of letters collected by letter boxes at the end of 2003. (percent)
10. CDLpColPoShr	Please estimate the share of letters collected by public postal outlets (open to private customers) at the end of 2003. (percent)
11. CDCpColPoShr	Please estimate the share of parcels collected by public postal outlets (open to private customers) at the end of 2003. (percent)
12. CDPobShr	Please estimate the share of addressed mail delivered at P.O. boxes at the end of 2003. (percent)
13. CDBlind	Does the USP supply postal services for blind people? (select one) 1. No No 2. YesFree Yes, for free 3. YesSameRate Yes, at same rate as standard service 4. YesHigherRate Yes, at extra rate
14. CDWorkShrCol	Please indicate the share of total man-hours devoted to collection. (percent)

231CD

15.	CDWorkShrTrsp	Please indicate the share of total man-hours devoted to transportation. (percent)
16.	CDWorkShrSort	Please indicate the share of total man-hours devoted to sorting activities. (percent)
17.	CDWorkShrDel	Please indicate the share of total man-hours devoted to delivery. (percent)
18.	CDNotes	Explanatory Notes: please include the number of questions referred to.
1009.	CDLpColBoxShrZ	Data availability
1010.	CDLpColPoShrZ	Data availability
1011.	CDCpColPoShrZ	Data availability
1012.	CDPobShrZ	Data availability
1014.	CDWorkShrColZ	Data availability
1015.	CDWorkShrTrspZ	Data availability
1016.	CDWorkShrSortZ	Data availability
1017.	CDWorkShrDelZ	Data availability



232TR

**Question Module: 232TR USP transport, safety, environment**

1. TRTrsp	Does the USP principally provide two separate transport networks for letters and parcels? (yes/no)
2. TRTrspLdAir	Please estimate the share of domestic mail conveyed by air transport (as primary mode of transport). (percent)
3. TRTrspLdRail	Please estimate the share of domestic mail conveyed by railroad transport (as primary mode of transport). (percent)
4. TRTrspLdRoad	Please estimate the share of domestic mail conveyed by street vehicles (for long distance transport). (percent)
5. TRTrspDelCar	Please estimate the share of mail delivered locally using cars or lorries (excl. mail addressed to P.O. boxes). (percent)
6. TRTrspDelMoto	Please estimate the share of mail delivered locally using motorbikes (excl. mail addressed to P.O. boxes). (percent)
7. TRTrspDelBike	Please estimate the share of mail delivered locally using bicycles (excl. mail addressed to P.O. boxes). (percent)
8. TRTrspDelFoot	Please estimate the share of mail delivered locally by foot (excl. mail addressed to P.O. boxes). (percent)
9. TRTer	Have any measures been implemented against potential terror attacks (e.g. anthrax, letter/parcel bombs)? (yes/no)
10. TRTerExpl	• If yes, please briefly describe. (text 250)
11. TREr	Does the USP regularly provide an environmental report? (yes/no)
12. TRErY1st	• If yes, in which year has the first environmental report been published? (select one) 1. 2003      2003 2. 2002      2002 3. 2001      2001 4. 2000      2000 5. 1999      1999 6. 1998      1998 7. before98      Before 1998
13. TRErYLast	• If yes, in which year has the last environmental report been published? (select one) 1. 2003      2003 2. 2002      2002 3. 2001      2001

232TR

	4. 2000	2000
	5. 1999	1999
	6. 1998	1998
	7. before98	Before 1998
14. TRerFut	• If no, is it planned to publish an environmental report until 2005? (yes/no)	
15. TRNotes	Explanatory Notes: please include the number of questions referred to.	
1002. TRTrspLdAirZ	Data availability	
1003. TRTrspLdRailZ	Data availability	
1004. TRTrspLdRoadZ	Data availability	
1005. TRTrspDelCarZ	Data availability	
1006. TRTrspDelMotoZ	Data availability	
1007. TRTrspDelBikeZ	Data availability	
1008. TRTrspDelFootZ	Data availability	

233TD

**Question Module: 233TD USP technological development**

1. TDInnProc	Over the last five years, what have been the key process innovations for your organisation? Please describe briefly the most important process innovations in your letter, parcel and express businesses or in other activities related to the postal sector. (
2. TDInnProd	Over the last five years, what have been the most important product innovations for your organisation? (text 250)
3. TDZip	Is a ZIP-code system implemented in your country? (yes/no)
4. TDZipDel	• If so, does your current ZIP-code system permit sorting to delivery districts (without use of street address)? (yes/no)
5. TDZipFut	• If not, is it planned to introduce a ZIP-code system? (yes/no)
6. TDTtExY	In what year did your organisation introduce - or plans to introduce - tracking and tracing for domestic express items? (select one) 1. before98 before 1998 2. 1998 1998 3. 1999 1999 4. 2000 2000 5. 2001 2001 6. 2002 2002 7. 2003 2003 8. 2004 2004 9. 2005 2005 10. 2006 2006 11. 2007orLater later than 2006 12. NotPlanned introduction not planned
7. TDTtCpBusY	• tracking and tracing for domestic business parcels? (select one) 1. before98 before 1998 2. 1998 1998 3. 1999 1999 4. 2000 2000 5. 2001 2001 6. 2002 2002 7. 2003 2003 8. 2004 2004 9. 2005 2005 10. 2006 2006 11. 2007orLater later than 2006 12. NotPlanned introduction not planned
8. TDTtCpUvsY	• tracking and tracing for all domestic universal service parcels? (select one)

233TD

- |                 |                          |
|-----------------|--------------------------|
| 1. before98     | before 1998              |
| 2. 1998         | 1998                     |
| 3. 1999         | 1999                     |
| 4. 2000         | 2000                     |
| 5. 2001         | 2001                     |
| 6. 2002         | 2002                     |
| 7. 2003         | 2003                     |
| 8. 2004         | 2004                     |
| 9. 2005         | 2005                     |
| 10. 2006        | 2006                     |
| 11. 2007orLater | later than 2006          |
| 12. NotPlanned  | introduction not planned |
- 

9. TDDelConfExY • delivery confirmation for domestic express items? (select one)

- |                 |                          |
|-----------------|--------------------------|
| 1. before98     | before 1998              |
| 2. 1998         | 1998                     |
| 3. 1999         | 1999                     |
| 4. 2000         | 2000                     |
| 5. 2001         | 2001                     |
| 6. 2002         | 2002                     |
| 7. 2003         | 2003                     |
| 8. 2004         | 2004                     |
| 9. 2005         | 2005                     |
| 10. 2006        | 2006                     |
| 11. 2007orLater | later than 2006          |
| 12. NotPlanned  | introduction not planned |
- 

10. TDDelConfCpBusY • delivery confirmation for domestic business parcels? (select one)

- |                 |                          |
|-----------------|--------------------------|
| 1. before98     | before 1998              |
| 2. 1998         | 1998                     |
| 3. 1999         | 1999                     |
| 4. 2000         | 2000                     |
| 5. 2001         | 2001                     |
| 6. 2002         | 2002                     |
| 7. 2003         | 2003                     |
| 8. 2004         | 2004                     |
| 9. 2005         | 2005                     |
| 10. 2006        | 2006                     |
| 11. 2007orLater | later than 2006          |
| 12. NotPlanned  | introduction not planned |
- 

11. TDDelConfCpUvsY • delivery confirmation for all domestic universal service parcels? (select one)

- |             |             |
|-------------|-------------|
| 1. before98 | before 1998 |
| 2. 1998     | 1998        |
| 3. 1999     | 1999        |
| 4. 2000     | 2000        |
| 5. 2001     | 2001        |
| 6. 2002     | 2002        |
| 7. 2003     | 2003        |

233TD

- |                 |                          |
|-----------------|--------------------------|
| 8. 2004         | 2004                     |
| 9. 2005         | 2005                     |
| 10. 2006        | 2006                     |
| 11. 2007orLater | later than 2006          |
| 12. NotPlanned  | introduction not planned |
- 

12. TDHybY

• hybrid mail services? (select one)

- |                 |                          |
|-----------------|--------------------------|
| 1. before98     | before 1998              |
| 2. 1998         | 1998                     |
| 3. 1999         | 1999                     |
| 4. 2000         | 2000                     |
| 5. 2001         | 2001                     |
| 6. 2002         | 2002                     |
| 7. 2003         | 2003                     |
| 8. 2004         | 2004                     |
| 9. 2005         | 2005                     |
| 10. 2006        | 2006                     |
| 11. 2007orLater | later than 2006          |
| 12. NotPlanned  | introduction not planned |
- 

13. TDCodeLpY

In what year did your organisation introduce - or plans to introduce - electronic bar codes and bar code readers for letters? (select one)

- |                 |                          |
|-----------------|--------------------------|
| 1. before98     | before 1998              |
| 2. 1998         | 1998                     |
| 3. 1999         | 1999                     |
| 4. 2000         | 2000                     |
| 5. 2001         | 2001                     |
| 6. 2002         | 2002                     |
| 7. 2003         | 2003                     |
| 8. 2004         | 2004                     |
| 9. 2005         | 2005                     |
| 10. 2006        | 2006                     |
| 11. 2007orLater | later than 2006          |
| 12. NotPlanned  | introduction not planned |
- 

14. TDCodeCpY

• electronic bar codes and bar code readers for parcels? (select one)

- |                 |                 |
|-----------------|-----------------|
| 1. before98     | before 1998     |
| 2. 1998         | 1998            |
| 3. 1999         | 1999            |
| 4. 2000         | 2000            |
| 5. 2001         | 2001            |
| 6. 2002         | 2002            |
| 7. 2003         | 2003            |
| 8. 2004         | 2004            |
| 9. 2005         | 2005            |
| 10. 2006        | 2006            |
| 11. 2007orLater | later than 2006 |

233TD

	12. NotPlanned	introduction not planned
15. TDSortOcrY	• sorting machines using optical character reading (OCR)? (select one)	
	1. before98	before 1998
	2. 1998	1998
	3. 1999	1999
	4. 2000	2000
	5. 2001	2001
	6. 2002	2002
	7. 2003	2003
	8. 2004	2004
	9. 2005	2005
	10. 2006	2006
	11. 2007orLater	later than 2006
	12. NotPlanned	introduction not planned
16. TDSortLpY	• automated sorting machines for small sized letters? (select one)	
	1. before98	before 1998
	2. 1998	1998
	3. 1999	1999
	4. 2000	2000
	5. 2001	2001
	6. 2002	2002
	7. 2003	2003
	8. 2004	2004
	9. 2005	2005
	10. 2006	2006
	11. 2007orLater	later than 2006
	12. NotPlanned	introduction not planned
17. TDSortFlatY	• automated sorting machines for large sized letters (flats)? (select one)	
	1. before98	before 1998
	2. 1998	1998
	3. 1999	1999
	4. 2000	2000
	5. 2001	2001
	6. 2002	2002
	7. 2003	2003
	8. 2004	2004
	9. 2005	2005
	10. 2006	2006
	11. 2007orLater	later than 2006
	12. NotPlanned	introduction not planned
18. TDSortCpY	• automated sorting machines for parcels? (select one)	
	1. before98	before 1998
	2. 1998	1998
	3. 1999	1999

233TD

		4. 2000	2000
		5. 2001	2001
		6. 2002	2002
		7. 2003	2003
		8. 2004	2004
		9. 2005	2005
		10. 2006	2006
		11. 2007orLater	later than 2006
		12. NotPlanned	introduction not planned
19.	TDSortDelY	• automated delivery sequence sorting? (select one)	
		1. before98	before 1998
		2. 1998	1998
		3. 1999	1999
		4. 2000	2000
		5. 2001	2001
		6. 2002	2002
		7. 2003	2003
		8. 2004	2004
		9. 2005	2005
		10. 2006	2006
		11. 2007orLater	later than 2006
		12. NotPlanned	introduction not planned
20.	TDSortLpNum98	Please indicate the total number of sorting machines for small sized letters in 1998.	
21.	TDSortLpNum01	• in 2001	
22.	TDSortLpNum04	• today (2004)	
23.	TDSortOcrNum98	Please indicate the total number of sorting machines for small sized letters using optical character reading in 1998.	
24.	TDSortOcrNum01	• in 2001	
25.	TDSortOcrNum04	• today (2004)	
26.	TDSortFlatNum98	Please indicate the total number of sorting machines for large sized letters (flats) in 1998.	
27.	TDSortFlatNum01	• in 2001	
28.	TDSortFlatNum04	• today (2004)	
29.	TDSortCpNum98	Please indicate the total number of sorting machines for parcels in 1998.	

233TD

---

30.	TDSortCpNum01	• in 2001
-----	---------------	-----------

---

31.	TDSortCpNum04	• today (2004)
-----	---------------	----------------

---

32.	TDSortDelNum98	Please indicate the total number of delivery sequence sorting machines in 1998.
-----	----------------	---

---

33.	TDSortDelNum01	• in 2001
-----	----------------	-----------

---

34.	TDSortDelNum04	• today (2004)
-----	----------------	----------------

---

35.	TDSclpNum98	Please state the total number of letter sorting centers in 1998.
-----	-------------	--

---

36.	TDSclpNum01	• in 2001
-----	-------------	-----------

---

37.	TDSclpNum04	• today (2004)
-----	-------------	----------------

---

38.	TDSscCpNum98	Please state the total number of parcel sorting centers in 1998.
-----	--------------	--

---

39.	TDSscCpNum01	• in 2001
-----	--------------	-----------

---

40.	TDSscCpNum04	• today (2004)
-----	--------------	----------------

---

41.	TDSortLpShr98	Please state (or estimate) the share of letters sorted automatically in 1998. (percent)
-----	---------------	---

---

42.	TDSortLpShr01	• in 2001 (percent)
-----	---------------	---------------------

---

43.	TDSortLpShr04	• today (2004) (percent)
-----	---------------	--------------------------

---

44.	TDSortOcrShr98	Please state (or estimate) the share of letters sorted using optical character reading in 1998. (percent)
-----	----------------	---

---

45.	TDSortOcrShr01	• in 2001(percent)
-----	----------------	--------------------

---

46.	TDSortOcrShr04	• today (2004) (percent)
-----	----------------	--------------------------

---

47.	TDSortCpShr98	Please state (or estimate) the share of parcels sorted automatically in 1998. (percent)
-----	---------------	---

---

48.	TDSortCpShr01	• in 2001 (percent)
-----	---------------	---------------------

---

49.	TDSortCpShr04	• today (2004) (percent)
-----	---------------	--------------------------

---



233TD

50.	TDOut	Which of your organisations postal activities have been outsourced at least partly? (multi-select) 1. Collect      Collection 2. Sor            Sorting 3. Tra            Transport 4. Delivery      Delivery 5. Po              Post Offices
51.	TDOutShr	Please estimate the share of outsourced activities in total expenses. (percent)
52.	TDOutColShr	Approximately what percent of postal items are collected by agents (contractors) rather than USP employees? (percent)
53.	TDOutDelShr	Approximately what percent of postal items are delivered by agents (contractors) rather than USP employees? (percent)
54.	TDOutFut	How will your organisation's outsourcing activities evolve in the future. (Select one) 1. 2              strongly increasing 2. 1              increasing 3. 0              no change 4. -1             decreasing 5. -2             strongly decreasing
55.	TPNotes	Explanatory Notes: please include the number of questions referred to.
1020.	TDSortLpNum98Z	Data availability
1021.	TDSortLpNum01Z	Data availability
1022.	TDSortLpNum04Z	Data availability
1023.	TDSortOcrNum98Z	Data availability
1024.	TDSortOcrNum01Z	Data availability
1025.	TDSortOcrNum04Z	Data availability
1026.	TDSortFlatNum98Z	Data availability
1027.	TDSortFlatNum01Z	Data availability
1028.	TDSortFlatNum04Z	Data availability
1029.	TDSortCpNum98Z	Data availability

233TD

---

1030.	TDSortCpNum01Z	Data availability
1031.	TDSortCpNum04Z	Data availability
1032.	TDSortDelNum98Z	Data availability
1033.	TDSortDelNum01Z	Data availability
1034.	TDSortDelNum04Z	Data availability
1035.	TDSclpNum98Z	Data availability
1036.	TDSclpNum01Z	Data availability
1037.	TDSclpNum04Z	Data availability
1038.	TDSscCpNum98Z	Data availability
1039.	TDSscCpNum01Z	Data availability
1040.	TDSscCpNum04Z	Data availability
1041.	TDSortLpShr98Z	Data availability
1042.	TDSortLpShr01Z	Data availability
1043.	TDSortLpShr04Z	Data availability
1044.	TDSortOcrShr98Z	Data availability
1045.	TDSortOcrShr01Z	Data availability
1046.	TDSortOcrShr04Z	Data availability
1047.	TDSortCpShr98Z	Data availability
1048.	TDSortCpShr01Z	Data availability
1049.	TDSortCpShr04Z	Data availability
1051.	TDOutShrZ	Data availability

---

233TD

---

1052.	TDOuCoIShrZ	Data availability
-------	-------------	-------------------

---

1053.	TDOuDeIShrZ	Data availability
-------	-------------	-------------------

---

234PP

**Question Module: 234PP USP price performance**

1. PPlocUnf	Does the USP apply geographically uniform tariffs for single piece correspondence in the lowest weight step sent by the fastest standard category? (yes/no)
2. PPCpUnf	Does the USP apply geographically uniform tariffs for single parcels? (yes/no)
3. PPCsLic	Are consolidators licenced by the USP? (yes/no)
4. PPBIkloc	Does the USP offer discount rates for correspondence tendered in bulk? (yes/no)
5. PPBIklocType	<ul style="list-style-type: none"> <li>• If so, what are the qualifications for discounts for bulk correspondence? (multi-select)</li> <li>1. Vol            Volume of mailing only</li> <li>2. Work        Presorting and other mail preparation</li> <li>3. Trans        Transport to a sorting center or office near addressee</li> <li>4. Other        (see Notes below)</li> </ul>
6. PPBIklocMinAmt	• If so, what is the lowest level of discount (in percent) compared to standard retail service for correspondence? (percent)
7. PPBIklocMinNum	• If so, what is the minimum number of items of correspondence needed to qualify for a lowest level of discount?
8. PPBIklocMaxAmt	• If so, what is the highest level of discount (in percent) compared to standard retail service for correspondence? (percent)
9. PPBIklocMaxNum	• If so, what is the minimum number of items of correspondence needed to qualify for a highest level of discount?
10. PPBIklocAvc	• If so, are discounts for bulk correspondence based on avoided costs? (yes/no)
11. PPBIklocTrn	• If so, are discounts for bulk correspondence transparent and non-discriminatory? (yes/no)
12. PPBIklocPct	• If so, approximately what percent of correspondence is carried under a bulk rate? (percent)
13. PPBIklocCsl	• If so, are all bulk correspondence rates available to consolidators? (yes/no)
14. PPBIklocCpo	• If so, are all bulk correspondence rates available to competitive postal operators? (yes/no)
15. PPBIkDm	Does the USP offer discount rates for direct mail tendered in bulk? (yes/no)
16. PPBIkDmType	• If so, what are the qualifications for discounts for bulk direct mail? (multi-select)

234PP

		1. Vol            Volume of mailing only 2. Work           Presorting and other mail preparation 3. Trans           Transport to a sorting center or office near addressee 4. Other           (see Notes below)
17.	PPBlkDmMinAmt	• If so, what is the lowest level of discount (in percent) compared to standard retail service for direct mail? (percent)
18.	PPBlkDmMinNum	• If so, what is the minimum number of items of direct mail needed to qualify for a lowest level of discount?
19.	PPBlkDmMaxAmt	• If so, what is the highest level of discount (in percent) compared to standard retail service for direct mail? (percent)
20.	PPBlkDmMaxNum	• If so, what is the minimum number of items of direct mail needed to qualify for a highest level of discount?
21.	PPBlkDmAvc	• If so, are discounts for bulk direct mail based on avoided costs? (yes/no)
22.	PPBlkDmTrn	• If so, are discounts for bulk direct mail transparent and non-discriminatory? (yes/no)
23.	PPBlkDmPct	• If so, approximately what percent of direct mail is carried under a bulk rate? (percent)
24.	PPBlkDmCsl	• If so, are all bulk direct mail rates available to consolidators? (yes/no)
25.	PPBlkDmCpo	• If so, are all bulk direct mail rates available to competitive postal operators? (yes/no)
26.	PPBlkCp	Does the USP offer discount rates for parcels tendered in bulk? (yes/no)
27.	PPBlkCpType	• If so, what are the qualifications for discounts for bulk parcels? (multi-select) 1. Vol            Volume of mailing only 2. Work           Presorting and other mail preparation 3. Trans           Transport to a sorting center or office near addressee 4. Other           (see Notes below)
28.	PPBlkCpMinAmt	• If so, what is the lowest level of discount (in percent) compared to standard retail service for parcels? (percent)
29.	PPBlkCpMinNum	• If so, what is the minimum number of items of parcels needed to qualify for a lowest level of discount?
30.	PPBlkCpMaxAmt	• If so, what is the highest level of discount (in percent) compared to standard retail service for parcels? (percent)
31.	PPBlkCpMaxNum	• If so, what is the minimum number of items of parcels needed to qualify for a highest level of discount?

234PP

32.	PPBlkCpAvc	• If so, are discounts for bulk parcels based on avoided costs? (yes/no)
33.	PPBlkCpTrn	• If so, are discounts for bulk parcels transparent and non-discriminatory? (yes/no)
34.	PPBlkCpPct	• If so, approximately what percent of parcels is carried under a bulk rate? (percent)
35.	PPBlkCpCsl	• If so, are all bulk parcels rates available to consolidators? (yes/no)
36.	PPBlkCpCpo	• If so, are all bulk parcels rates available to competitive postal operators? (yes/no)
37.	PPTdCpo	Are terminal dues rates offered to EU USPs also available to competitive postal operators? (yes/no)
38.	PPNotes	Explanatory Notes: please include the number of questions referred to.
1006.	PPBlklocMinAmtZ	Data availability
1007.	PPBlklocMinNumZ	Data availability
1008.	PPBlklocMaxAmtZ	Data availability
1009.	PPBlklocMaxNumZ	Data availability
1012.	PPBlklocPctZ	Data availability
1017.	PPBlkDmMinAmtZ	Data availability
1018.	PPBlkDmMinNumZ	Data availability
1019.	PPBlkDmMaxAmtZ	Data availability
1020.	PPBlkDmMaxNumZ	Data availability
1023.	PPBlkDmPctZ	Data availability
1028.	PPBlkCpMinAmtZ	Data availability
1029.	PPBlkCpMinNumZ	Data availability
1030.	PPBlkCpMaxAmtZ	Data availability

234PP

---

1031. PPBlkCpMaxNumZ Data availability

---

1034. PPBlkCpPctZ Data availability

236MS

## Question Module: 236MS Market structure analysis

1. MSAcquDom	In which postal market segments and related sectors, if any, has the USP acquired companies in its home market over the last five years. (multi-select)
	<ul style="list-style-type: none"> <li>1. Lp Letter post</li> <li>2. Cp Parcels</li> <li>3. Ex Express</li> <li>4. Unaddr Unaddressed delivery</li> <li>5. Freight Freight</li> <li>6. Postbank Post bank</li> <li>7. Finance Finance</li> <li>8. Printing Printing</li> <li>9. MailPrep Mail prep</li> <li>10. Retail Retail</li> <li>11. Internet Internet</li> <li>12. Hybrid Hybrid mail</li> <li>13. Email Email</li> <li>14. Mailroom Mailroom management</li> <li>15. Advertising Advertising</li> <li>16. Other (see Notes below)</li> <li>17. None No acquisitions</li> </ul>
2. MSAcquIntl	In which postal market segments and related sectors, if any, has the USP acquired foreign companies over the last five years. (multi-select)
	<ul style="list-style-type: none"> <li>1. Lp Letter post</li> <li>2. Cp Parcels</li> <li>3. Ex Express</li> <li>4. Unaddr Unaddressed delivery</li> <li>5. Freight Freight</li> <li>6. Postbank Post bank</li> <li>7. Finance Finance</li> <li>8. Printing Printing</li> <li>9. MailPrep Mail prep</li> <li>10. Retail Retail</li> <li>11. Internet Internet</li> <li>12. Hybrid Hybrid mail</li> <li>13. Email Email</li> <li>14. Mailroom Mailroom management</li> <li>15. Advertising Advertising</li> <li>16. Other (see Notes below)</li> <li>17. None No acquisitions</li> </ul>
3. MSCoopEx	Does the USP have a co-operate with an international express company in order to provide express services to ist customers? (select one)
	<ul style="list-style-type: none"> <li>1. None No co-operation</li> <li>2. Ocb Yes, co-operation for outbound express services</li> <li>3. Dom Yes, co-operation for domestic express services</li> <li>4. Dom+Ocb Yes, co-operation for outbound and domestic express services</li> <li>5. Other Other type of co-operation - use Explanatory Notes</li> </ul>
4. MSCoopExNam	• If so, with which company does the USP co-operate in providing express services?
	<ul style="list-style-type: none"> <li>1. DHL DHL</li> </ul>



236MS

	2. TNT	TNT
	3. UPS	United Parcel Service
	4. GeoPoste	DPD/GeoPoste
	5. Other	(see Notes below)
5. MSCompRes	Does the USP to a substantial degree face illegal competition within the reserved area or by unlicensed operators? (yes/no)	
6. MSCompResNts	• If so, please explain briefly. (text 250)	
7. MSPerLpDomPast	How would you characterise the perceived development of competition in the domestic letter post market during the last 5 years? (select one)	
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
8. MSPerLpDomFut	What do you foresee as the most likely development of competition in the domestic letter post market in the next 5 years? (select one)	
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
9. MSPerCpDomPast	How would you characterise the perceived development of competition in the domestic parcel market during the last 5 years? (select one)	
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
10. MSPerCpDomFut	What do you foresee as the most likely development of competition in the domestic parcel market in the next 5 years? (select one)	
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
11. MSPerExDomPast	How would you characterise the perceived development of competition in the domestic express market during the last 5 years? (select one)	
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion

236MS

12.	MSPerExDomFut	What do you foresee as the most likely development of competition in the domestic express market in the next 5 years? (select one)
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
13.	MSChoiceLp	Approximately what percent of individual mailers have a choice between at least two providers of letter post services? (select one)
	1. NA	No available information
	2. 1	Less than 1 percent
	3. 5	Less than 5 percent
	4. 10	Less than 10 percent
	5. 25	Less than 25 percent
	6. 50	Less than 50 percent
	7. 75	Less than 75 percent
	8. 100	Practically everyone
14.	MSChoiceCp	Approximately what percent of individual mailers have a choice between at least two providers of parcel services? (select one)
	1. NA	No available information
	2. 1	Less than 1 percent
	3. 5	Less than 5 percent
	4. 10	Less than 10 percent
	5. 25	Less than 25 percent
	6. 50	Less than 50 percent
	7. 75	Less than 75 percent
	8. 100	Practically everyone
15.	MSDomLpName	Please state the five most important operators in the domestic letter post market at the end of 2003. (in ascending order of importance) (text 100)
16.	MSDomLpMktShr	Please estimate the accumulated market share of the three most major suppliers of domestic letter services at the end of 2003 (incl. the USP). (select one)
	1. 0	0 %
	2. 2	2 %
	3. 5	5 %
	4. 10	10 %
	5. 15	15 %
	6. 20	20 %
	7. 30	30 %
	8. 40	40 %
	9. 50	50 %
	10. 60	60 %
	11. 70	70 %
	12. 80	80 %
	13. 90	90 %
	14. 95	95 %
	15. 98	98 %
	16. 100	100 %

236MS

17.	MSDomLpSubseg	Which subsegments of the domestic letter post market, if any, do you consider the most competitive? Please explain and provide results of or reference to available market analysis studies. (text 100)																																																
18.	MSCboLpName	Please state the five most important operators in the outbound cross border letter post market at the end of 2003. (in ascending order of importance) (text 100)																																																
19.	MSCboLpMktShr	<p>Please estimate the accumulated market share of the three most important suppliers of outbound cross border letter services at the end of 2003 (incl. the USP). (select one)</p> <table> <tr><td>1.</td><td>0</td><td>0 %</td></tr> <tr><td>2.</td><td>2</td><td>2 %</td></tr> <tr><td>3.</td><td>5</td><td>5 %</td></tr> <tr><td>4.</td><td>10</td><td>10 %</td></tr> <tr><td>5.</td><td>15</td><td>15 %</td></tr> <tr><td>6.</td><td>20</td><td>20 %</td></tr> <tr><td>7.</td><td>30</td><td>30 %</td></tr> <tr><td>8.</td><td>40</td><td>40 %</td></tr> <tr><td>9.</td><td>50</td><td>50 %</td></tr> <tr><td>10.</td><td>60</td><td>60 %</td></tr> <tr><td>11.</td><td>70</td><td>70 %</td></tr> <tr><td>12.</td><td>80</td><td>80 %</td></tr> <tr><td>13.</td><td>90</td><td>90 %</td></tr> <tr><td>14.</td><td>95</td><td>95 %</td></tr> <tr><td>15.</td><td>98</td><td>98 %</td></tr> <tr><td>16.</td><td>100</td><td>100 %</td></tr> </table>	1.	0	0 %	2.	2	2 %	3.	5	5 %	4.	10	10 %	5.	15	15 %	6.	20	20 %	7.	30	30 %	8.	40	40 %	9.	50	50 %	10.	60	60 %	11.	70	70 %	12.	80	80 %	13.	90	90 %	14.	95	95 %	15.	98	98 %	16.	100	100 %
1.	0	0 %																																																
2.	2	2 %																																																
3.	5	5 %																																																
4.	10	10 %																																																
5.	15	15 %																																																
6.	20	20 %																																																
7.	30	30 %																																																
8.	40	40 %																																																
9.	50	50 %																																																
10.	60	60 %																																																
11.	70	70 %																																																
12.	80	80 %																																																
13.	90	90 %																																																
14.	95	95 %																																																
15.	98	98 %																																																
16.	100	100 %																																																
20.	MSCboLpSubseg	Which subsegments of the outbound cross border letter post market, if any, do you consider the most competitive? Please explain and provide results of or reference to available market analysis studies. (text 100)																																																
21.	MSDomPeName	Please state the five most important operators in the domestic parcel and express market at the end of 2003. (in ascending order of importance) (text 100)																																																
22.	MSDomPeMktShr	<p>Please estimate the accumulated market share of the three most important suppliers of domestic parcel services at the end of 2003 (incl. the USP). (select one)</p> <table> <tr><td>1.</td><td>0</td><td>0 %</td></tr> <tr><td>2.</td><td>2</td><td>2 %</td></tr> <tr><td>3.</td><td>5</td><td>5 %</td></tr> <tr><td>4.</td><td>10</td><td>10 %</td></tr> <tr><td>5.</td><td>15</td><td>15 %</td></tr> <tr><td>6.</td><td>20</td><td>20 %</td></tr> <tr><td>7.</td><td>30</td><td>30 %</td></tr> <tr><td>8.</td><td>40</td><td>40 %</td></tr> <tr><td>9.</td><td>50</td><td>50 %</td></tr> <tr><td>10.</td><td>60</td><td>60 %</td></tr> <tr><td>11.</td><td>70</td><td>70 %</td></tr> <tr><td>12.</td><td>80</td><td>80 %</td></tr> <tr><td>13.</td><td>90</td><td>90 %</td></tr> <tr><td>14.</td><td>95</td><td>95 %</td></tr> <tr><td>15.</td><td>98</td><td>98 %</td></tr> <tr><td>16.</td><td>100</td><td>100 %</td></tr> </table>	1.	0	0 %	2.	2	2 %	3.	5	5 %	4.	10	10 %	5.	15	15 %	6.	20	20 %	7.	30	30 %	8.	40	40 %	9.	50	50 %	10.	60	60 %	11.	70	70 %	12.	80	80 %	13.	90	90 %	14.	95	95 %	15.	98	98 %	16.	100	100 %
1.	0	0 %																																																
2.	2	2 %																																																
3.	5	5 %																																																
4.	10	10 %																																																
5.	15	15 %																																																
6.	20	20 %																																																
7.	30	30 %																																																
8.	40	40 %																																																
9.	50	50 %																																																
10.	60	60 %																																																
11.	70	70 %																																																
12.	80	80 %																																																
13.	90	90 %																																																
14.	95	95 %																																																
15.	98	98 %																																																
16.	100	100 %																																																

236MS

23.	MSDomPeSubseg	Which subsegments of the domestic parcel and express market do you consider the most competitive? Please explain and provide results of or reference to available market analysis studies. (text 100)																																																
24.	MSCboCpName	Please state the five most important operators in the outbound cross border parcel market at the end of 2003. (in ascending order of importance) (text 100)																																																
25.	MSCboCbMktShr	<p>Please estimate the accumulated market share of the three most important suppliers of outbound cross border parcels at the end of 2003 (incl. the USP). (select one)</p> <table> <tr><td>1.</td><td>0</td><td>0 %</td></tr> <tr><td>2.</td><td>2</td><td>2 %</td></tr> <tr><td>3.</td><td>5</td><td>5 %</td></tr> <tr><td>4.</td><td>10</td><td>10 %</td></tr> <tr><td>5.</td><td>15</td><td>15 %</td></tr> <tr><td>6.</td><td>20</td><td>20 %</td></tr> <tr><td>7.</td><td>30</td><td>30 %</td></tr> <tr><td>8.</td><td>40</td><td>40 %</td></tr> <tr><td>9.</td><td>50</td><td>50 %</td></tr> <tr><td>10.</td><td>60</td><td>60 %</td></tr> <tr><td>11.</td><td>70</td><td>70 %</td></tr> <tr><td>12.</td><td>80</td><td>80 %</td></tr> <tr><td>13.</td><td>90</td><td>90 %</td></tr> <tr><td>14.</td><td>95</td><td>95 %</td></tr> <tr><td>15.</td><td>98</td><td>98 %</td></tr> <tr><td>16.</td><td>100</td><td>100 %</td></tr> </table>	1.	0	0 %	2.	2	2 %	3.	5	5 %	4.	10	10 %	5.	15	15 %	6.	20	20 %	7.	30	30 %	8.	40	40 %	9.	50	50 %	10.	60	60 %	11.	70	70 %	12.	80	80 %	13.	90	90 %	14.	95	95 %	15.	98	98 %	16.	100	100 %
1.	0	0 %																																																
2.	2	2 %																																																
3.	5	5 %																																																
4.	10	10 %																																																
5.	15	15 %																																																
6.	20	20 %																																																
7.	30	30 %																																																
8.	40	40 %																																																
9.	50	50 %																																																
10.	60	60 %																																																
11.	70	70 %																																																
12.	80	80 %																																																
13.	90	90 %																																																
14.	95	95 %																																																
15.	98	98 %																																																
16.	100	100 %																																																
26.	MSCboCpSubseg	Which subsegments of the outbound cross border parcel market do you consider the most competitive? Please explain and provide results of or reference to available market analysis studies. (text 100)																																																
27.	MSCboExName	Please state the five most important operators in the outbound cross border express market at the end of 2003. (in ascending order of importance) (text 100)																																																
28.	MSCboExMktShr	<p>Please estimate the accumulated market share of the three most important suppliers of outbound cross border express services at the end of 2003 (incl. the USP). (select one)</p> <table> <tr><td>1.</td><td>0</td><td>0 %</td></tr> <tr><td>2.</td><td>2</td><td>2 %</td></tr> <tr><td>3.</td><td>5</td><td>5 %</td></tr> <tr><td>4.</td><td>10</td><td>10 %</td></tr> <tr><td>5.</td><td>15</td><td>15 %</td></tr> <tr><td>6.</td><td>20</td><td>20 %</td></tr> <tr><td>7.</td><td>30</td><td>30 %</td></tr> <tr><td>8.</td><td>40</td><td>40 %</td></tr> <tr><td>9.</td><td>50</td><td>50 %</td></tr> <tr><td>10.</td><td>60</td><td>60 %</td></tr> <tr><td>11.</td><td>70</td><td>70 %</td></tr> <tr><td>12.</td><td>80</td><td>80 %</td></tr> <tr><td>13.</td><td>90</td><td>90 %</td></tr> <tr><td>14.</td><td>95</td><td>95 %</td></tr> <tr><td>15.</td><td>98</td><td>98 %</td></tr> <tr><td>16.</td><td>100</td><td>100 %</td></tr> </table>	1.	0	0 %	2.	2	2 %	3.	5	5 %	4.	10	10 %	5.	15	15 %	6.	20	20 %	7.	30	30 %	8.	40	40 %	9.	50	50 %	10.	60	60 %	11.	70	70 %	12.	80	80 %	13.	90	90 %	14.	95	95 %	15.	98	98 %	16.	100	100 %
1.	0	0 %																																																
2.	2	2 %																																																
3.	5	5 %																																																
4.	10	10 %																																																
5.	15	15 %																																																
6.	20	20 %																																																
7.	30	30 %																																																
8.	40	40 %																																																
9.	50	50 %																																																
10.	60	60 %																																																
11.	70	70 %																																																
12.	80	80 %																																																
13.	90	90 %																																																
14.	95	95 %																																																
15.	98	98 %																																																
16.	100	100 %																																																

236MS

---

29. MSCboExSubseg Which subsegments of the outbound cross border express market do you consider the most competitive? Please explain and provide results of or reference to available market analysis studies. (text 100)

---

30. MSnotes Explanatory Notes: please include the number of questions referred to.

237DS

## Question Module: 237DS Demand structure analysis

1. DSIpVolFut	<p>Do you expect overall letter volumes to grow over the next five years?</p> <ol style="list-style-type: none"> <li>1. Increase&gt;2 % Strong increase (annual growth &gt;2%)</li> <li>2. Increase&lt;2 % Slight increase (annual growth &lt;2%)</li> <li>3. No change No change</li> <li>4. Decrease&lt;2% Slight decrease (annual decrease &lt;2%)</li> <li>5. Decrease&gt;2% Strong decrease (annual decrease &gt;2%)</li> </ol>
2. DSiocVolFut	<p>Do you expect the volume of items of correspondence (i.e. excl direct mail) to grow over the next five years?</p> <ol style="list-style-type: none"> <li>1. Increase&gt;2 % Strong increase (annual growth &gt;2%)</li> <li>2. Increase&lt;2 % Slight increase (annual growth &lt;2%)</li> <li>3. No change No change</li> <li>4. Decrease&lt;2% Slight decrease (annual decrease &lt;2%)</li> <li>5. Decrease&gt;2% Strong decrease (annual decrease &gt;2%)</li> </ol>
3. DSdmVolFut	<p>Do you expect direct mail volumes to grow over the next five years?</p> <ol style="list-style-type: none"> <li>1. Increase&gt;2 % Strong increase (annual growth &gt;2%)</li> <li>2. Increase&lt;2 % Slight increase (annual growth &lt;2%)</li> <li>3. No change No change</li> <li>4. Decrease&lt;2% Slight decrease (annual decrease &lt;2%)</li> <li>5. Decrease&gt;2% Strong decrease (annual decrease &gt;2%)</li> </ol>
4. DSIpShrP2p	<p>Please state or estimate the share of total letter post volume (incl. direct mail) sent by households/private customers to households/private customers (C2C). (percent)</p>
5. DSIpShrP2b	<p>Please state or estimate the share of total letter post volume (incl. direct mail) sent by households/private customers to businesses (C2B). (percent)</p>
6. DSIpShrB2p	<p>Please state or estimate the share of total letter post volume (incl. direct mail) sent by businesses to households/private customers (B2C). (percent)</p>
7. DSIpShrB2b	<p>Please state or estimate the share of total letter post volume (incl. direct mail) sent by businesses to businesses (B2B). (percent)</p>
8. DSIpP2xFut	<p>Please classify your future expectation concerning the share of letters sent by households/private customers.</p> <ol style="list-style-type: none"> <li>1. 5 Strong increase</li> <li>2. 4 Slight increase</li> <li>3. 3 No change</li> </ol>

237DS

	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
9. DSIpX2pFut	Please classify your future expectation concerning the share of letters received by households/private customers.	
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
10. DScpP2x	Please estimate the share of all parcels delivered by the USP sent by households/private customers. (percent)	
11. DScpP2xFut	Please classify your future expectation concerning the share of USP parcels sent by households/private customers.	
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
12. DSAdvPct	Today advertisements, including individualised advertisements, comprise approximately what percent of letter post items? (percent)	
13. DSAdvPct5yr	According your best estimate, in 5 years, advertisements, including individualised advertisements, will comprise what percent of letter post items? (percent)	
14. DSAdvPct10yr	According your best estimate, in 10 years, advertisements, including individualised advertisements, will comprise what percent of letter post items? (percent)	
15. DSlocP2xReas	For items of correspondence (excl. direct mail) sent by households, what do you consider to be the most important factor influencing volumes in the next five years?	
	1. GDP	Overall economic growth
	2. E-sub	Electronic substitution
	3. Other	(see Notes below)
16. DSlocB2xReas	For items of correspondence (excl. direct mail) sent by businesses, what do you consider to be the most important factor influencing volumes in the next five years?	
	1. GDP	Overall economic growth
	2. E-sub	Electronic substitution
	3. Other	(see Notes below)
17. DSDmReas	For direct mail, what do you consider to be the most important factor influencing volumes in the next five years?	
	1. GDP	Overall economic growth
	2. E-sub	Electronic substitution
	3. Other	(see Notes below)
18. DSLpShr50	Please state or estimate the share of the USPs letter post volume (incl. direct mail) weighing 50 gram or less. (percent)	

237DS

---

19.	DSLpShr100	Please state or estimate the share of the USPs letter post volume (incl. direct mail) weighing 100 gram or less. (percent)
20.	DSLpShr350	Please state or estimate the share of the USPs letter post volume (incl. direct mail) weighing 350 gram or less. (percent)
21.	DSExpPs	If known, please state the average monthly amount spent by households for postal services. (number)
22.	DSExpCur	• Please indicate the currency for the average monthly amount spent by households
1004.	DSlpShrP2pZ	Data availability
1005.	DSlpShrP2bZ	Data availability
1006.	DSlpShrB2pZ	Data availability
1007.	DSlpShrB2bZ	Data availability
1010.	DScpP2xZ	Data availability
1012.	DSAdvPctZ	Data availability
1018.	DSLpShr50Z	Data availability
1019.	DSLpShr100Z	Data availability
1020.	DSLpShr350Z	Data availability

---



251CA

**Question Module: 251CA Consumer associations**

1. CACty	Country name (select one)
2. CAImpLpPast	Has the importance of letter mail services increased or decreased over the last 5 years? (select one) <ul style="list-style-type: none"> <li>1. 5 Strong increase</li> <li>2. 4 Slight increase</li> <li>3. 3 No change</li> <li>4. 2 Slight decrease</li> <li>5. 1 Strong decrease</li> <li>6. 0 No opinion</li> </ul>
3. CAImpLpFut	Does your organisation expect an increase or a decrease in the importance of letter mail services in the future? (select one) <ul style="list-style-type: none"> <li>1. 5 Strong increase</li> <li>2. 4 Slight increase</li> <li>3. 3 No change</li> <li>4. 2 Slight decrease</li> <li>5. 1 Strong decrease</li> <li>6. 0 No opinion</li> </ul>
4. CAImpCpPast	Has the importance of parcel services increased or decreased over the last 5 years? (select one) <ul style="list-style-type: none"> <li>1. 5 Strong increase</li> <li>2. 4 Slight increase</li> <li>3. 3 No change</li> <li>4. 2 Slight decrease</li> <li>5. 1 Strong decrease</li> <li>6. 0 No opinion</li> </ul>
5. CAImpCpFut	Does your organisation expect an increase or a decrease in the importance of parcel services in the future? (select one) <ul style="list-style-type: none"> <li>1. 5 Strong increase</li> <li>2. 4 Slight increase</li> <li>3. 3 No change</li> <li>4. 2 Slight decrease</li> <li>5. 1 Strong decrease</li> <li>6. 0 No opinion</li> </ul>
6. CAChoiceLp	Approximately what percent of individual mailers have a choice between at least two providers of letter post services? (select one) <ul style="list-style-type: none"> <li>1. NA No available information</li> <li>2. 1 Less than 1 percent</li> <li>3. 5 Less than 5 percent</li> <li>4. 10 Less than 10 percent</li> <li>5. 25 Less than 25 percent</li> <li>6. 50 Less than 50 percent</li> <li>7. 75 Less than 75 percent</li> <li>8. 100 Practically everyone</li> </ul>
7. CAChoiceCp	Approximately what percent of individual mailers have a choice between at least two providers of parcel services? (select one)

251CA

	1. NA	No available information
	2. 1	Less than 1 percent
	3. 5	Less than 5 percent
	4. 10	Less than 10 percent
	5. 25	Less than 25 percent
	6. 50	Less than 50 percent
	7. 75	Less than 75 percent
	8. 100	Practically everyone
8. CAPerLpDom	Perceived level of competition in the domestic letter post market. (select one)	
	1. 0	None
	2. 1	Emerging
	3. 2	Substantial
	4. 3	Intense
9. CAPerLpDomPast	Perceived development of competition in the domestic letter market during the last 5 years. (select one)	
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
10. CAPerLpDomFut	Expected future development of competition in the domestic letter post market. (select one)	
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
11. CAPerCpDom	Perceived level of competition in the domestic parcel market. (select one)	
	1. 0	None
	2. 1	Emerging
	3. 2	Substantial
	4. 3	Intense
12. CAPerCpDomPast	Perceived development of competition in the domestic parcel market during the last 5 years. (select one)	
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
13. CAPerCpDomFut	Expected future development of competition in the domestic parcel market. (select one)	
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
14. CAPerExDom	Perceived level of competition in the domestic express market. (select one)	

251CA

		1. 0	None
		2. 1	Emerging
		3. 2	Substantial
		4. 3	Intense
15.	CAPerExDomPast	Perceived development of competition in the domestic express market during the last 5 years. (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
16.	CAPerExDomFut	Expected future development of competition in the domestic express market. (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
17.	CASatQosLp	Are consumers satisfied with the overall quality of domestic letter services available in the market? (select one)	
		1. 1	Not satisfied
		2. 2	Less satisfied
		3. 3	Satisfied
		4. 4	Fairly satisfied
		5. 5	Highly satisfied
		6. 0	No opinion
18.	CASatQosCp	Are consumers satisfied with the overall quality of domestic parcel services available in the market? (select one)	
		1. 1	Not satisfied
		2. 2	Less satisfied
		3. 3	Satisfied
		4. 4	Fairly satisfied
		5. 5	Highly satisfied
		6. 0	No opinion
19.	CAPerQosLp	How has the overall quality of domestic letter services available in the market changed over the last 5 years? (select one)	
		1. 5	Considerable improvement
		2. 4	Improvement
		3. 3	No change
		4. 2	Worsening
		5. 1	Considerable worsening
		6. 0	No opinion
20.	CAPerQosCp	How has the overall quality of domestic parcel services available in the market changed over the last 5 years? (select one)	
		1. 5	Considerable improvement
		2. 4	Improvement
		3. 3	No change
		4. 2	Worsening
		5. 1	Considerable worsening

251CA

		6. 0	No opinion
21.	CASatAcsLb	Are consumers satisfied with the number and density of street letter boxes? (select one)	
		1. 1	Not satisfied
		2. 2	Less satisfied
		3. 3	Satisfied
		4. 4	Fairly satisfied
		5. 5	Highly satisfied
		6. 0	No opinion
22.	CAPerAcsLb	How has the conditions in respect to street letter boxes changed over the last 5 years? (select one)	
		1. 5	Considerable improvement
		2. 4	Improvement
		3. 3	No change
		4. 2	Worsening
		5. 1	Considerable worsening
		6. 0	No opinion
23.	CASatAcsPo	Are consumers satisfied with the number and density of postal outlets? (select one)	
		1. 1	Not satisfied
		2. 2	Less satisfied
		3. 3	Satisfied
		4. 4	Fairly satisfied
		5. 5	Highly satisfied
		6. 0	No opinion
24.	CAPerAcsPo	How has the conditions in respect to postal outlets changed over the last 5 years? (select one)	
		1. 5	Considerable improvement
		2. 4	Improvement
		3. 3	No change
		4. 2	Worsening
		5. 1	Considerable worsening
		6. 0	No opinion
25.	CASatDelLp	Are consumers satisfied with the delivery conditions of letter mail items? (select one)	
		1. 1	Not satisfied
		2. 2	Less satisfied
		3. 3	Satisfied
		4. 4	Fairly satisfied
		5. 5	Highly satisfied
		6. 0	No opinion
26.	CAPerDelLp	How has the delivery conditions of letter mail items changed over the last 5 years? (select one)	
		1. 5	Considerable improvement
		2. 4	Improvement
		3. 3	No change
		4. 2	Worsening
		5. 1	Considerable worsening
		6. 0	No opinion
27.	CASatDelCp	Are the consumers satisfied with the delivery conditions of parcels? (select one)	
		1. 1	Not satisfied
		2. 2	Less satisfied

251CA

		3. 3	Satisfied
		4. 4	Fairly satisfied
		5. 5	Highly satisfied
		6. 0	No opinion
28.	CAPerDelCp	How has the delivery conditions of parcels changed over the last 5 years? (select one)	
		1. 5	Considerable improvement
		2. 4	Improvement
		3. 3	No change
		4. 2	Worsening
		5. 1	Considerable worsening
		6. 0	No opinion
29.	CAC2CLpFut	Does your institution expect an increase or decrease in letter mail volumes sent between individuals (C2C) in the next years? (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
30.	CAC2BLpFut	Does your institution expect an increase or decrease in letter mail volumes sent from individuals to businesses (C2B) in the next years? (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
31.	CAB2CLpFut	Does your institution expect an increase or decrease in letter mail volumes sent from businesses to consumers (B2C) in the next years (excluding direct mail)? (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
32.	CAB2CDmFut	Does your institution expect an increase or decrease in direct mail sent from businesses to consumers (B2C) in the next years? (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
33.	CAC2CCpFut	Does your institution expect an increase or decrease in parcel volumes sent between consumers (C2C) in the next years? (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease

251CA

	6. 0	No opinion
34. CAB2CCpFut	Does your institution expect an increase or decrease in parcel volumes sent from businesses to consumers (B2C) in the next years? (select one)	
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
35. CAPsBusFut	Does your organisation expect that postal services would be more and more treated as normal business in the next 5 years? (yes/no)	
	.	
36. CAPsComFut	Does your institution expect an increase or decrease in importance of postal services as means of communication (items of correspondence) in the next 5 years. (select one)	
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
37. CAPsTransFut	Does your institution expect an increase or decrease in importance of postal services as means of distribution (advertising and parcels) in the next 5 years? (select one)	
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
38. CAImpServGen1	What is the most important service of all services of general interest in the view of your organisation? (select one)	
	1. Elec	Electricity supply services
	2. Gas	Gas supply services
	3. Water	Water supply services
	4. Fixed	Fixed telephone services
	5. Mobile	Mobile telephone services
	6. Postal	Postal services
	7. Transport	Transport services within towns and cities
	8. Rail	Rail services between towns and cities
39. CAImpServGen2	What is the second important service of all services of general interest in the view of your organisation? (select one)	
	1. Elec	Electricity supply services
	2. Gas	Gas supply services
	3. Water	Water supply services
	4. Fixed	Fixed telephone services
	5. Mobile	Mobile telephone services
	6. Postal	Postal services
	7. Transport	Transport services within towns and cities
	8. Rail	Rail services between towns and cities
40. CAImpServGen3	What is the third important service of all services of general interest in the view of your organisation? (select one)	

251CA

- |              |  |
|--------------|--|
| 1. Elec      | Electricity supply services                |
| 2. Gas       | Gas supply services                        |
| 3. Water     | Water supply services                      |
| 4. Fixed     | Fixed telephone services                   |
| 5. Mobile    | Mobile telephone services                  |
| 6. Postal    | Postal services                            |
| 7. Transport | Transport services within towns and cities |
| 8. Rail      | Rail services between towns and cities     |
- 

41. CANotes

Explanatory Notes: please include the number of questions referred to.

252BM

**Question Module: 252BM Business associations and mailers**

1. BMCty	Country name (select one)
2. BMInst	What kind of association do you represent? (select one) 1. BA Business association 2. BM Business mailer 3. Other (see Notes below)
3. BMType	Please specify the most important groups of your members in case you represent a business association. (multi-select) 1. MO Distance selling companies (mail ordering) 2. DM Direct marketing companies 3. PUB Publishers 4. Other (see Notes below)
4. BMImpServGen1	What is the most important service of all services of general interest in the view of you (or your members)? (select one) 1. Elec Electricity supply services 2. Gas Gas supply services 3. Water Water supply services 4. Fixed Fixed telephone services 5. Mobile Mobile telephone services 6. Postal Postal services 7. Transport Transport services within towns and cities 8. Rail Rail services between towns and cities
5. BMImpServGen2	What is the second important service of all services of general interest in the view of you (or your members)? (select one) 1. Elec Electricity supply services 2. Gas Gas supply services 3. Water Water supply services 4. Fixed Fixed telephone services 5. Mobile Mobile telephone services 6. Postal Postal services 7. Transport Transport services within towns and cities 8. Rail Rail services between towns and cities
6. BMImpServGen3	What is the third important service of all services of general interest in the view of you (or your members)? (select one) 1. Elec Electricity supply services 2. Gas Gas supply services 3. Water Water supply services 4. Fixed Fixed telephone services 5. Mobile Mobile telephone services 6. Postal Postal services 7. Transport Transport services within towns and cities 8. Rail Rail services between towns and cities
7. BMPsBusFut	Does your organisation expect that postal services would be more and more treated as normal business in the next 5 years? (yes/no)



252BM

8. BMPsComFut	Does your institution expect an increase or decrease in importance of postal services as means of communication (items of correspondence) in the next 5 years. (select one)
	<ul style="list-style-type: none"> <li>1. 5 Strong increase</li> <li>2. 4 Slight increase</li> <li>3. 3 No change</li> <li>4. 2 Slight decrease</li> <li>5. 1 Strong decrease</li> <li>6. 0 No opinion</li> </ul>
9. BMPsTransFut	Does your institution expect an increase or decrease in importance of postal services as means of distribution (advertising and parcels) in the next 5 years? (select one)
	<ul style="list-style-type: none"> <li>1. 5 Strong increase</li> <li>2. 4 Slight increase</li> <li>3. 3 No change</li> <li>4. 2 Slight decrease</li> <li>5. 1 Strong decrease</li> <li>6. 0 No opinion</li> </ul>
10. BMChgLp	Expected future development of demand for letter services (excl. direct mail). (select one)
	<ul style="list-style-type: none"> <li>1. SIncrease Strong increase</li> <li>2. Increase Slight increase</li> <li>3. No change No change</li> <li>4. Decrease Slight decrease</li> <li>5. SDecrease Decrease</li> </ul>
11. BMChgDm	Expected future development of demand for direct mail. (select one)
	<ul style="list-style-type: none"> <li>1. SIncrease Strong increase</li> <li>2. Increase Slight increase</li> <li>3. No change No change</li> <li>4. Decrease Slight decrease</li> <li>5. SDecrease Decrease</li> </ul>
12. BMChgCp	Expected future development of demand for parcel services. (select one)
	<ul style="list-style-type: none"> <li>1. SIncrease Strong increase</li> <li>2. Increase Slight increase</li> <li>3. No change No change</li> <li>4. Decrease Slight decrease</li> <li>5. SDecrease Decrease</li> </ul>
13. BMChgExp	Expected future development of demand for express services. (select one)
	<ul style="list-style-type: none"> <li>1. SIncrease Strong increase</li> <li>2. Increase Slight increase</li> <li>3. No change No change</li> <li>4. Decrease Slight decrease</li> <li>5. SDecrease Decrease</li> </ul>
14. BMB2CLpFut	Expected development in letter mail volumes sent to consumers (B2C) in the next years? (select one)
	<ul style="list-style-type: none"> <li>1. 5 Strong increase</li> <li>2. 4 Slight increase</li> <li>3. 3 No change</li> <li>4. 2 Slight decrease</li> <li>5. 1 Strong decrease</li> <li>6. 0 No opinion</li> </ul>

252BM

15.	BMB2BLpFut	Expected development in letter mail volumes sent to business recipients (B2B) in the next years? (select one)
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
16.	BMB2CCpFut	Expected development in parcel volumes sent to consumers (B2C) in the next years? (select one)
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
17.	BMB2BCpFut	Expected development in parcel volumes sent to business recipients (B2B) in the next years? (select one)
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
18.	BMPerLpDom	Perceived level of competition in domestic letter post market (select one)
	1. 0	None
	2. 1	Emerging
	3. 2	Substantial
	4. 3	Intense
19.	BMPerLpDomPast	Perceived development of competition in domestic letter post market during the last 5 years. (select one)
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
20.	BMPerLpDomFut	Expected future development of competition in domestic letter post market. (select one)
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
21.	BMPerCpDom	Perceived level of competition in domestic parcel market (select one)
	1. 0	None
	2. 1	Emerging
	3. 2	Substantial
	4. 3	Intense

252BM

22.	BMPerCpDomPast	Perceived development of competition in domestic parcel market during the last 5 years. (select one)
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
23.	BMPerCpDomFut	Expected future development of competition in domestic parcel market. (select one)
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
24.	BMPerExDom	Perceived level of competition in domestic express market (select one)
	1. 0	None
	2. 1	Emerging
	3. 2	Substantial
	4. 3	Intense
25.	BMPerExDomPast	Perceived development of competition in domestic express market during the last 5 years. (select one)
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
26.	BMPerExDomFut	Expected future development of competition in domestic express market. (select one)
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
27.	BMPerUa	Perceived level of competition in unaddressed mail market (select one)
	1. 0	None
	2. 1	Emerging
	3. 2	Substantial
	4. 3	Intense
28.	BMPerUaPast	Perceived development of competition in unaddressed mail market during the last 5 years. (select one)
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
29.	BMPerUaFut	Expected future development of competition in unaddressed mail market. (select one)

252BM

		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
30.	BMQosLpDomPast	How has the overall quality of domestic letter services available in the market changed over the last 5 years? (select one)	
		1. 5	Considerable improvement
		2. 4	Improvement
		3. 3	No change
		4. 2	Worsening
		5. 1	Considerable worsening
		6. 0	No opinion
31.	BMMktLpDomChg1	• In your judgement, which has been the most important factor responsible for this development? (select one)	
		1. CompLib	Liberalisation (reduction of the reserved area of USP)
		2. Reg	Improved regulatory standards
		3. USP	Improved USP operations
		4. Corp	USP restructuring (corporatisation or privatisation)
		5. Comp	Increased competition among operators
		6. Subst	Increased substitution competition (telcomm, internet, etc.)
		7. Demand	Increased customer demands
		8. Tech	Technological advances
		9. Other	Other - use Explanatory Notes
32.	BMMktLpDomChg2	• In your judgement, which has been the second most important factor responsible for this development? (select one)	
		1. CompLib	Liberalisation (reduction of the reserved area of USP)
		2. Reg	Improved regulatory standards
		3. USP	Improved USP operations
		4. Corp	USP restructuring (corporatisation or privatisation)
		5. Comp	Increased competition among operators
		6. Subst	Increased substitution competition (telcomm, internet, etc.)
		7. Demand	Increased customer demands
		8. Tech	Technological advances
		9. Other	Other - use Explanatory Notes
33.	BMQosLpDomFut	Expected future development of the overall quality of domestic letter services in the next 5 years. (select one)	
		1. 5	Considerable improvement
		2. 4	Improvement
		3. 3	No change
		4. 2	Worsening
		5. 1	Considerable worsening
		6. 0	No opinion
34.	BMQosCpDomPast	How has the overall quality of domestic parcel and express services available in the market changed over the last 5 years? (select one)	
		1. 5	Considerable improvement
		2. 4	Improvement
		3. 3	No change
		4. 2	Worsening

252BM

	5. 1	Considerable worsening
	6. 0	No opinion
35. BMMktCpDomChg1	<p>• In your judgement, which has been the most important factor responsible for this development? (select one)</p> <p>1. CompLib Liberalisation (reduction of the reserved area of USP)</p> <p>2. Reg Improved regulatory standards</p> <p>3. USP Improved USP operations</p> <p>4. Corp USP restructuring (corporatisation or privatisation)</p> <p>5. Comp Increased competition among operators</p> <p>6. Subst Increased substitution competition (telcomm, internet, etc.)</p> <p>7. Demand Increased customer demands</p> <p>8. Tech Technological advances</p> <p>9. Other Other - use Explanatory Notes</p>	
36. BMMktCpDomChg2	<p>• In your judgement, which has been the second most important factor responsible for this development? (select one)</p> <p>1. CompLib Liberalisation (reduction of the reserved area of USP)</p> <p>2. Reg Improved regulatory standards</p> <p>3. USP Improved USP operations</p> <p>4. Corp USP restructuring (corporatisation or privatisation)</p> <p>5. Comp Increased competition among operators</p> <p>6. Subst Increased substitution competition (telcomm, internet, etc.)</p> <p>7. Demand Increased customer demands</p> <p>8. Tech Technological advances</p> <p>9. Other Other - use Explanatory Notes</p>	
37. BMQosCpDomFut	<p>Expected future development of the overall quality of parcel and express services in the next 5 years. (select one)</p> <p>1. 5 Considerable improvement</p> <p>2. 4 Improvement</p> <p>3. 3 No change</p> <p>4. 2 Worsening</p> <p>5. 1 Considerable worsening</p> <p>6. 0 No opinion</p>	
38. BMPerLpCbo	<p>Perceived level of competition in outbound cross border letter post market (select one)</p> <p>1. 0 None</p> <p>2. 1 Emerging</p> <p>3. 2 Substantial</p> <p>4. 3 Intense</p>	
39. BMPerLpCboPast	<p>Perceived development of competition in outbound cross border letter post market during the last 5 years. (select one)</p> <p>1. 5 Strong increase</p> <p>2. 4 Slight increase</p> <p>3. 3 No change</p> <p>4. 2 Slight decrease</p> <p>5. 1 Strong decrease</p> <p>6. 0 No opinion</p>	
40. BMPerLpCboFut	<p>Expected future development of competition in outbound cross border letter post market. (select one)</p> <p>1. 5 Strong increase</p> <p>2. 4 Slight increase</p> <p>3. 3 No change</p>	

252BM

		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
41.	BMPerCpCbo	Perceived level of competition in outbound cross border parcel market (select one)	
		1. 0	None
		2. 1	Emerging
		3. 2	Substantial
		4. 3	Intense
42.	BMPerCpCboPast	Perceived development of competition in outbound cross border parcel market during the last 5 years. (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
43.	BMPerCpCboFut	Expected future development of competition in outbound cross border parcel market. (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
44.	BMPerExCbo	Perceived level of competition in outbound cross border express market (select one)	
		1. 0	None
		2. 1	Emerging
		3. 2	Substantial
		4. 3	Intense
45.	BMPerExCboPast	Perceived development of competition in outbound cross border express market during the last 5 years. (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
46.	BMPerExCboFut	Expected future development of competition in outbound cross border express market. (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
47.	BMQosLpCbPast	How has the overall quality of cross-border letter services available in the market changed over the last 5 years? (select one)	
		1. 5	Considerable improvement
		2. 4	Improvement

252BM

	3. 3	No change
	4. 2	Worsening
	5. 1	Considerable worsening
	6. 0	No opinion
48. BMMktLpCbChg1	<p>• In your judgement, which has been the most important factor responsible for this development? (select one)</p> <p>1. CompLib Liberalisation (reduction of the reserved area of USP)</p> <p>2. Reg Improved regulatory standards</p> <p>3. USP Improved USP operations</p> <p>4. Corp USP restructuring (corporatisation or privatisation)</p> <p>5. Comp Increased competition among operators</p> <p>6. Subst Increased substitution competition (telcomm, internet, etc.)</p> <p>7. Demand Increased customer demands</p> <p>8. Tech Technological advances</p> <p>9. Other Other - use Explanatory Notes</p>	
49. BMMktLpCbChg2	<p>• In your judgement, which has been the second most important factor responsible for this development? (select one)</p> <p>1. CompLib Liberalisation (reduction of the reserved area of USP)</p> <p>2. Reg Improved regulatory standards</p> <p>3. USP Improved USP operations</p> <p>4. Corp USP restructuring (corporatisation or privatisation)</p> <p>5. Comp Increased competition among operators</p> <p>6. Subst Increased substitution competition (telcomm, internet, etc.)</p> <p>7. Demand Increased customer demands</p> <p>8. Tech Technological advances</p> <p>9. Other Other - use Explanatory Notes</p>	
50. BMQosLpCbFut	<p>Expected future development of the overall quality of cross-border letter services in the next 5 years. (select one)</p> <p>1. 5 Considerable improvement</p> <p>2. 4 Improvement</p> <p>3. 3 No change</p> <p>4. 2 Worsening</p> <p>5. 1 Considerable worsening</p> <p>6. 0 No opinion</p>	
51. BMQosCpCbPast	<p>How has the overall quality of cross-border parcel and express services available in the market changed over the last 5 years? (select one)</p> <p>1. 5 Considerable improvement</p> <p>2. 4 Improvement</p> <p>3. 3 No change</p> <p>4. 2 Worsening</p> <p>5. 1 Considerable worsening</p> <p>6. 0 No opinion</p>	
52. BMMktCpCbChg1	<p>• In your judgement, which has been the most important factor responsible for this development? (select one)</p> <p>1. CompLib Liberalisation (reduction of the reserved area of USP)</p> <p>2. Reg Improved regulatory standards</p> <p>3. USP Improved USP operations</p> <p>4. Corp USP restructuring (corporatisation or privatisation)</p> <p>5. Comp Increased competition among operators</p> <p>6. Subst Increased substitution competition (telcomm, internet, etc.)</p>	

252BM

	7. Demand	Increased customer demands
	8. Tech	Technological advances
	9. Other	Other - use Explanatory Notes
53. BMMktCpCbChg2	<ul style="list-style-type: none"> <li>• In your judgement, which has been the second most important factor responsible for this development? (select one)</li> </ul>	
	1. CompLib	Liberalisation (reduction of the reserved area of USP)
	2. Reg	Improved regulatory standards
	3. USP	Improved USP operations
	4. Corp	USP restructuring (corporatisation or privatisation)
	5. Comp	Increased competition among operators
	6. Subst	Increased substitution competition (telcomm, internet, etc.)
	7. Demand	Increased customer demands
	8. Tech	Technological advances
	9. Other	Other - use Explanatory Notes
54. BMQosCpCbFut	<ul style="list-style-type: none"> <li>Expected future development of the overall quality of cross-border parcel and express services in the next 5 years. (select one)</li> </ul>	
	1. 5	Considerable improvement
	2. 4	Improvement
	3. 3	No change
	4. 2	Worsening
	5. 1	Considerable worsening
	6. 0	No opinion
55. BMNotes	Explanatory Notes: please include the number of questions referred to.	



253UN

**Question Module: 253UN Postal unions**

1. UN Cty	Country name
2. UN Type	Please indicate which employee groups are mainly represented by your trade union. (multi-select) 1. CvIServ Civil servants employed by the USP 2. EmplUsp Employees of the USP 3. EmplCpo Employees of other postal and express service provider than 4. Other (see Notes below)
3. UN OdegrUsp	Please estimate the share of USP-employees organised in the union? (select one) 1. NA No available information 2. 1 Less than 1 percent 3. 5 Less than 5 percent 4. 10 Less than 10 percent 5. 25 Less than 25 percent 6. 50 Less than 50 percent 7. 75 Less than 75 percent 8. 100 Practically everyone
4. UN OdegrCpo	Please estimate the share of non USP-employees organised in the union (employed by other postal or express operators)? (select one) 1. NA No available information 2. 1 Less than 1 percent 3. 5 Less than 5 percent 4. 10 Less than 10 percent 5. 25 Less than 25 percent 6. 50 Less than 50 percent 7. 75 Less than 75 percent 8. 100 Practically everyone
5. UN EmpUspChg	Does your organisation expect an increase or decrease in employment at the universal service provider in the next years? (select one) 1. 5 Strong increase 2. 4 Slight increase 3. 3 No change 4. 2 Slight decrease 5. 1 Strong decrease 6. 0 No opinion
6. UN EmpOpChg	Does your organisation expect an increase or decrease in employment at all postal and express companies (incl. USP) in the next years? (select one) 1. 5 Strong increase 2. 4 Slight increase 3. 3 No change 4. 2 Slight decrease 5. 1 Strong decrease 6. 0 No opinion
7. UN EmpFut1	• In your judgement, which has been the most important factor responsible for this development? (select one) 1. Outsourc Outsourcing activities (see instructions)

253UN

		2. Opt	Optimising working processes
		3. Aut	Automising activities
		4. Demand	Decreasing demand
		5. Other	(see Notes below)
8.	UNEmpFut2	• In your judgement, which has been the second most important factor responsible for this development? (select one)	
		1. Outsourc	Outsourcing activities (see instructions)
		2. Opt	Optimising working processes
		3. Aut	Automising activities
		4. Demand	Decreasing demand
		5. Other	(see Notes below)
9.	UNEmpFut3	• In your judgement, which has been the third most important factor responsible for this development? (select one)	
		1. Outsourc	Outsourcing activities (see instructions)
		2. Opt	Optimising working processes
		3. Aut	Automising activities
		4. Demand	Decreasing demand
		5. Other	(see Notes below)
10.	UNWorkCond	Are your members satisfied with the overall working conditions? (select one)	
		1. 1	Not satisfied
		2. 2	Less satisfied
		3. 3	Satisfied
		4. 4	Fairly satisfied
		5. 5	Highly satisfied
		6. 0	No opinion
11.	UNWorkCondChg	Have the working conditions improved or worsened in the last 5 years? (select one)	
		1. 5	Considerable improvement
		2. 4	Improvement
		3. 3	No change
		4. 2	Worsening
		5. 1	Considerable worsening
		6. 0	No opinion
12.	UNWorkCondFut	Expected future development of working conditions in the next 5 years. (select one)	
		1. 5	Considerable improvement
		2. 4	Improvement
		3. 3	No change
		4. 2	Worsening
		5. 1	Considerable worsening
		6. 0	No opinion
13.	UNQoSLpPast	How has the overall quality of domestic letter services available in the market changed over the last 5 years? (select one)	
		1. 5	Considerable improvement
		2. 4	Improvement
		3. 3	No change
		4. 2	Worsening
		5. 1	Considerable worsening
		6. 0	No opinion
14.	UNMktLpChg1	• In your judgement, which has been the most important factor responsible for this development? (select one)	

253UN

		<ol style="list-style-type: none"> <li>1. CompLib Liberalisation (reduction of the reserved area of USP)</li> <li>2. Reg Improved regulatory standards</li> <li>3. USP Improved USP operations</li> <li>4. Corp USP restructuring (corporatisation or privatisation)</li> <li>5. Comp Increased competition among operators</li> <li>6. Subst Increased substitution competition (telcomm, internet, etc.)</li> <li>7. Demand Increased customer demands</li> <li>8. Tech Technological advances</li> <li>9. Other Other - use Explanatory Notes</li> </ol>
15.	UNMktLpChg2	<p>• In your judgement, which has been the second most important factor responsible for this development? (select one)</p> <ol style="list-style-type: none"> <li>1. CompLib Liberalisation (reduction of the reserved area of USP)</li> <li>2. Reg Improved regulatory standards</li> <li>3. USP Improved USP operations</li> <li>4. Corp USP restructuring (corporatisation or privatisation)</li> <li>5. Comp Increased competition among operators</li> <li>6. Subst Increased substitution competition (telcomm, internet, etc.)</li> <li>7. Demand Increased customer demands</li> <li>8. Tech Technological advances</li> <li>9. Other Other - use Explanatory Notes</li> </ol>
16.	UNQosLpFut	<p>Expected future development of the overall quality of domestic letter services in the next 5 years. (select one)</p> <ol style="list-style-type: none"> <li>1. 5 Considerable improvement</li> <li>2. 4 Improvement</li> <li>3. 3 No change</li> <li>4. 2 Worsening</li> <li>5. 1 Considerable worsening</li> <li>6. 0 No opinion</li> </ol>
17.	UNQosCpPast	<p>How has the overall quality of domestic parcel services available in the market changed over the last 5 years? (select one)</p> <ol style="list-style-type: none"> <li>1. 5 Considerable improvement</li> <li>2. 4 Improvement</li> <li>3. 3 No change</li> <li>4. 2 Worsening</li> <li>5. 1 Considerable worsening</li> <li>6. 0 No opinion</li> </ol>
18.	UNMktCpChg1	<p>• In your judgement, which has been the most important factor responsible for this development? (select one)</p> <ol style="list-style-type: none"> <li>1. CompLib Liberalisation (reduction of the reserved area of USP)</li> <li>2. Reg Improved regulatory standards</li> <li>3. USP Improved USP operations</li> <li>4. Corp USP restructuring (corporatisation or privatisation)</li> <li>5. Comp Increased competition among operators</li> <li>6. Subst Increased substitution competition (telcomm, internet, etc.)</li> <li>7. Demand Increased customer demands</li> <li>8. Tech Technological advances</li> <li>9. Other Other - use Explanatory Notes</li> </ol>
19.	UNMktCpChg2	<p>• In your judgement, which has been the second most important factor responsible for this development? (select one)</p> <ol style="list-style-type: none"> <li>1. CompLib Liberalisation (reduction of the reserved area of USP)</li> </ol>

253UN

		2. Reg	Improved regulatory standards
		3. USP	Improved USP operations
		4. Corp	USP restructuring (corporatisation or privatisation)
		5. Comp	Increased competition among operators
		6. Subst	Increased substitution competition (telcomm, internet, etc.)
		7. Demand	Increased customer demands
		8. Tech	Technological advances
		9. Other	Other - use Explanatory Notes
20.	UNQosCpFut	Expected future development of the overall quality of parcel services in the next 5 years. (select one)	
		1. 5	Considerable improvement
		2. 4	Improvement
		3. 3	No change
		4. 2	Worsening
		5. 1	Considerable worsening
		6. 0	No opinion
21.	UNChgLp	Expected future development of demand for letter services (excl. direct mail). (select one)	
		1. SIncrease	Strong increase
		2. Increase	Slight increase
		3. No change	No change
		4. Decrease	Slight decrease
		5. SDecrease	Decrease
22.	UNChgDm	Expected future development of demand for direct mail. (select one)	
		1. SIncrease	Strong increase
		2. Increase	Slight increase
		3. No change	No change
		4. Decrease	Slight decrease
		5. SDecrease	Decrease
23.	UNChgCp	Expected future development of demand for parcel services. (select one)	
		1. SIncrease	Strong increase
		2. Increase	Slight increase
		3. No change	No change
		4. Decrease	Slight decrease
		5. SDecrease	Decrease
24.	UNChgExp	Expected future development of demand for express services. (select one)	
		1. SIncrease	Strong increase
		2. Increase	Slight increase
		3. No change	No change
		4. Decrease	Slight decrease
		5. SDecrease	Decrease
25.	UNPsBusFut	Does your organisation expect that postal services would be more and more treated as normal business in the next 5 years? (yes/no)	
26.	UNPsComFut	Expected importance of postal services as means of communication (items of correspondence) in the next 5 years. (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease

253UN

	5. 1	Strong decrease
	6. 0	No opinion
<hr/>		
27. UNPsTransFut	Expected importance of postal services as means of distribution (advertising and parcels) in the next 5 years? (select one)	
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
<hr/>		
28. UNNotes	Explanatory Notes: please include the number of questions referred to.	

254CP

### Question Module: 254CP Competitive postal/express operators - European level

1. CPMkt	Please specify which postal services does your organisation provide. (multi-select)
	<ul style="list-style-type: none"> <li>1. Lp Letter services</li> <li>2. Cp Parcel services</li> <li>3. Dx Document exchange services</li> <li>4. Ex Express services</li> <li>5. Cou Courier services</li> <li>6. Ua Distribution of unaddressed items</li> <li>7. Other (see Notes below)</li> </ul>
2. CPPsType	Please specify the geographical scope of postal and express services provided by your company. (select one)
	<ul style="list-style-type: none"> <li>1. Dom Domestic postal services</li> <li>2. Cb Cross-border postal services</li> <li>3. DomCb Domestic and cross-border postal services</li> <li>4. Other (see Notes below)</li> </ul>
3. CPCust	Does your company also provides postal and express services for residents (non-business mailer)? (yes/no)
4. CPQosLpChg	In the EU-15 countries, how has the overall quality of cross-border letter services available in the market changed over the last 5 years? (select one)
	<ul style="list-style-type: none"> <li>1. 5 Considerable improvement</li> <li>2. 4 Improvement</li> <li>3. 3 No change</li> <li>4. 2 Worsening</li> <li>5. 1 Considerable worsening</li> <li>6. 0 No opinion</li> </ul>
5. CPQosLpChg1	• In your judgement, which has been the most important factor responsible for this development? (select one)
	<ul style="list-style-type: none"> <li>1. CompLib Liberalisation (reduction of the reserved area of USP)</li> <li>2. Reg Improved regulatory standards</li> <li>3. USP Improved USP operations</li> <li>4. Corp USP restructuring (corporatisation or privatisation)</li> <li>5. Comp Increased competition among operators</li> <li>6. Subst Increased substitution competition (telcomm, internet, etc.)</li> <li>7. Demand Increased customer demands</li> <li>8. Tech Technological advances</li> <li>9. Other Other - use Explanatory Notes</li> </ul>
6. CPQosLpChg2	• In your judgement, which has been the second most important factor responsible for this development? (select one)
	<ul style="list-style-type: none"> <li>1. CompLib Liberalisation (reduction of the reserved area of USP)</li> <li>2. Reg Improved regulatory standards</li> <li>3. USP Improved USP operations</li> <li>4. Corp USP restructuring (corporatisation or privatisation)</li> <li>5. Comp Increased competition among operators</li> <li>6. Subst Increased substitution competition (telcomm, internet, etc.)</li> <li>7. Demand Increased customer demands</li> <li>8. Tech Technological advances</li> <li>9. Other Other - use Explanatory Notes</li> </ul>

254CP

7. CPQosLpChg3	<p>• In your judgement, which has been the third most important factor responsible for this development? (select one)</p> <ol style="list-style-type: none"> <li>1. CompLib Liberalisation (reduction of the reserved area of USP)</li> <li>2. Reg Improved regulatory standards</li> <li>3. USP Improved USP operations</li> <li>4. Corp USP restructuring (corporatisation or privatisation)</li> <li>5. Comp Increased competition among operators</li> <li>6. Subst Increased substitution competition (telcomm, internet, etc.)</li> <li>7. Demand Increased customer demands</li> <li>8. Tech Technological advances</li> <li>9. Other Other - use Explanatory Notes</li> </ol>
8. CPQosLpFut	<p>Expected future development of the overall quality of cross-border letter services in the next 5 years.</p> <ol style="list-style-type: none"> <li>1. 5 Considerable improvement</li> <li>2. 4 Improvement</li> <li>3. 3 No change</li> <li>4. 2 Worsening</li> <li>5. 1 Considerable worsening</li> <li>6. 0 No opinion</li> </ol>
9. CPQosCpPast	<p>In the EU-15 countries, how has the overall quality of cross-border parcel and express services available in the market changed over the last 5 years? (select one)</p> <ol style="list-style-type: none"> <li>1. 5 Considerable improvement</li> <li>2. 4 Improvement</li> <li>3. 3 No change</li> <li>4. 2 Worsening</li> <li>5. 1 Considerable worsening</li> <li>6. 0 No opinion</li> </ol>
10. CPQosCpChg1	<p>• In your judgement, which has been the most important factor responsible for this development? (select one)</p> <ol style="list-style-type: none"> <li>1. CompLib Liberalisation (reduction of the reserved area of USP)</li> <li>2. Reg Improved regulatory standards</li> <li>3. USP Improved USP operations</li> <li>4. Corp USP restructuring (corporatisation or privatisation)</li> <li>5. Comp Increased competition among operators</li> <li>6. Subst Increased substitution competition (telcomm, internet, etc.)</li> <li>7. Demand Increased customer demands</li> <li>8. Tech Technological advances</li> <li>9. Other Other - use Explanatory Notes</li> </ol>
11. CPQosCpChg2	<p>• In your judgement, which has been the second most important factor responsible for this development? (select one)</p> <ol style="list-style-type: none"> <li>1. CompLib Liberalisation (reduction of the reserved area of USP)</li> <li>2. Reg Improved regulatory standards</li> <li>3. USP Improved USP operations</li> <li>4. Corp USP restructuring (corporatisation or privatisation)</li> <li>5. Comp Increased competition among operators</li> <li>6. Subst Increased substitution competition (telcomm, internet, etc.)</li> <li>7. Demand Increased customer demands</li> <li>8. Tech Technological advances</li> <li>9. Other Other - use Explanatory Notes</li> </ol>

254CP

12. CPQosCpChg3	<p>• In your judgement, which has been the third most important factor responsible for this development? (select one)</p> <ol style="list-style-type: none"> <li>1. CompLib Liberalisation (reduction of the reserved area of USP)</li> <li>2. Reg Improved regulatory standards</li> <li>3. USP Improved USP operations</li> <li>4. Corp USP restructuring (corporatisation or privatisation)</li> <li>5. Comp Increased competition among operators</li> <li>6. Subst Increased substitution competition (telcomm, internet, etc.)</li> <li>7. Demand Increased customer demands</li> <li>8. Tech Technological advances</li> <li>9. Other Other - use Explanatory Notes</li> </ol>
13. CPQosCpFut	<p>Expected future development of the overall quality of cross-border parcel and express services in the next 5 years.</p> <ol style="list-style-type: none"> <li>1. 5 Considerable improvement</li> <li>2. 4 Improvement</li> <li>3. 3 No change</li> <li>4. 2 Worsening</li> <li>5. 1 Considerable worsening</li> <li>6. 0 No opinion</li> </ol>
14. CPChgLp	<p>Expected future development of demand for cross-border letter services (excl. direct mail) in the EU-15 countries. (select one)</p> <ol style="list-style-type: none"> <li>1. SIncrease Strong increase</li> <li>2. Increase Slight increase</li> <li>3. No change No change</li> <li>4. Decrease Slight decrease</li> <li>5. SDecrease Decrease</li> </ol>
15. CPChgDm	<p>Expected future development of demand for cross-border direct mail in the EU-15 countries. (select one)</p> <ol style="list-style-type: none"> <li>1. SIncrease Strong increase</li> <li>2. Increase Slight increase</li> <li>3. No change No change</li> <li>4. Decrease Slight decrease</li> <li>5. SDecrease Decrease</li> </ol>
16. CPChgCp	<p>Expected future development of demand for cross-border parcel services in the EU-15 countries. (select one)</p> <ol style="list-style-type: none"> <li>1. SIncrease Strong increase</li> <li>2. Increase Slight increase</li> <li>3. No change No change</li> <li>4. Decrease Slight decrease</li> <li>5. SDecrease Decrease</li> </ol>
17. CPChgExp	<p>Expected future development of demand for cross-border express services in the EU-15 countries. (select one)</p> <ol style="list-style-type: none"> <li>1. SIncrease Strong increase</li> <li>2. Increase Slight increase</li> <li>3. No change No change</li> <li>4. Decrease Slight decrease</li> <li>5. SDecrease Decrease</li> </ol>
18. CPCCompLpPast	<p>In the EU-15 countries, has competition increased or decreased in the cross-border letter mail segment in the last 5 years? (select one)</p> <ol style="list-style-type: none"> <li>1. 5 Strong increase</li> </ol>



254CP

		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
19.	CPCompLpFut	Expected future development of competition in the cross-border letter mail segment in the next 5 years. (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
20.	CPCompCpPast	In the EU-15 countries, has competition increased or decreased in the cross-border parcel segment in the last 5 years? (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
21.	CPCompCpFut	Expected future development of competition in the cross-border parcel segment in the next 5 years. (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
22.	CPCompExPast	In the EU-15 countries, has competition increased or decreased in the cross-border express segment in the last 5 years? (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
23.	CPCompExFut	Expected future development of competition in the cross-border express segment in the next 5 years. (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
24.	CPCompEmp	Will increasing competition increase or decrease future employment in the European postal sector? (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change

254CP

		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
25.	CPCompWage	Will increasing competition increase or decrease the future postal wage level? (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
26.	CPPsBusFut	Does your organisation expect that postal services would be more and more treated as normal business in the next 5 years? (yes/no)	
27.	CPPsComFut	Does your institution expect an increase or decrease in importance of postal services as means of communication (items of correspondence) in the next 5 years. (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
28.	CPPsTransFut	Does your institution expect an increase or decrease in importance of postal services as means of distribution (advertising and parcels) in the next 5 years? (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
29.	CPNotes	Explanatory Notes: please include the number of questions referred to.	

255CN

**Question Module: 255CN Competitive postal/express operators - national level**

1. CNCty1	Country name
2. CNMkt1	Please specify which postal services your organisation provides. (multi-select) <ul style="list-style-type: none"> <li>1. Lp Letter services</li> <li>2. Cp Parcel services</li> <li>3. Dx Document exchange services</li> <li>4. Ex Express services</li> <li>5. Cou Courier services</li> <li>6. Ua Distribution of unaddressed items</li> <li>7. Other (see Notes below)</li> </ul>
3. CNPsType1	Please specify the geographical scope of postal services provided by your company. (select one) <ul style="list-style-type: none"> <li>1. Dom Domestic postal services</li> <li>2. Cb Cross-border postal services</li> <li>3. DomCb Domestic and cross-border postal services</li> <li>4. Other (see Notes below)</li> </ul>
4. CNType1	Please specify the geographical area where your company provides domestic postal services, if any. (select one) <ul style="list-style-type: none"> <li>1. Cty Whole country</li> <li>2. City Large cities only</li> <li>3. Urban All urban areas</li> <li>4. Other (see Notes below)</li> </ul>
5. CNPsMkt1	Please specify in which letter market segment(s) your organisation provides postal services, if any. (multi-select) <ul style="list-style-type: none"> <li>1. None No provision of letter services</li> <li>2. Lp Items of correspondence excl. advertising mail</li> <li>3. Dm Advertising mail</li> <li>4. News Newspapers, magazines and other periodicals</li> <li>5. Other (see Notes below)</li> </ul>
6. CNCust1	Does your company also provides postal services for residents (non-business mailer)? (yes/no)
7. CNBox1	Does your company make use of letter boxes? (yes/no)
8. CNPo1	How many outlets does your company have, if any?
9. CNQosLpPast1	How has the overall quality of domestic letter services available in the market changed over the last 5 years? (select one) <ul style="list-style-type: none"> <li>1. 5 Considerable improvement</li> <li>2. 4 Improvement</li> <li>3. 3 No change</li> <li>4. 2 Worsening</li> <li>5. 1 Considerable worsening</li> <li>6. 0 No opinion</li> </ul>

255CN

10. CNMktLpChg11	<p>• In your judgement, which has been the most important factor responsible for this development? (select one)</p> <ol style="list-style-type: none"> <li>1. CompLib Liberalisation (reduction of the reserved area of USP)</li> <li>2. Reg Improved regulatory standards</li> <li>3. USP Improved USP operations</li> <li>4. Corp USP restructuring (corporatisation or privatisation)</li> <li>5. Comp Increased competition among operators</li> <li>6. Subst Increased substitution competition (telcomm, internet, etc.)</li> <li>7. Demand Increased customer demands</li> <li>8. Tech Technological advances</li> <li>9. Other Other - use Explanatory Notes</li> </ol>
11. CNMktLpChg21	<p>• In your judgement, which has been the second most important factor responsible for this development? (select one)</p> <ol style="list-style-type: none"> <li>1. CompLib Liberalisation (reduction of the reserved area of USP)</li> <li>2. Reg Improved regulatory standards</li> <li>3. USP Improved USP operations</li> <li>4. Corp USP restructuring (corporatisation or privatisation)</li> <li>5. Comp Increased competition among operators</li> <li>6. Subst Increased substitution competition (telcomm, internet, etc.)</li> <li>7. Demand Increased customer demands</li> <li>8. Tech Technological advances</li> <li>9. Other Other - use Explanatory Notes</li> </ol>
12. CNMktLpChg31	<p>• In your judgement, which has been the third most important factor responsible for this development? (select one)</p> <ol style="list-style-type: none"> <li>1. CompLib Liberalisation (reduction of the reserved area of USP)</li> <li>2. Reg Improved regulatory standards</li> <li>3. USP Improved USP operations</li> <li>4. Corp USP restructuring (corporatisation or privatisation)</li> <li>5. Comp Increased competition among operators</li> <li>6. Subst Increased substitution competition (telcomm, internet, etc.)</li> <li>7. Demand Increased customer demands</li> <li>8. Tech Technological advances</li> <li>9. Other Other - use Explanatory Notes</li> </ol>
13. CNQosLpFut1	<p>Expected future development of the overall quality of domestic letter services in the next 5 years. (select one)</p> <ol style="list-style-type: none"> <li>1. 5 Considerable improvement</li> <li>2. 4 Improvement</li> <li>3. 3 No change</li> <li>4. 2 Worsening</li> <li>5. 1 Considerable worsening</li> <li>6. 0 No opinion</li> </ol>
14. CNQosCpPast1	<p>How has the overall quality of domestic parcel and express services available in the market changed over the last 5 years? (select one)</p> <ol style="list-style-type: none"> <li>1. 5 Considerable improvement</li> <li>2. 4 Improvement</li> <li>3. 3 No change</li> <li>4. 2 Worsening</li> <li>5. 1 Considerable worsening</li> <li>6. 0 No opinion</li> </ol>

255CN

15. CNMktCpChg11	<p>• In your judgement, which has been the most important factor responsible for this development? (select one)</p> <ol style="list-style-type: none"> <li>1. CompLib Liberalisation (reduction of the reserved area of USP)</li> <li>2. Reg Improved regulatory standards</li> <li>3. USP Improved USP operations</li> <li>4. Corp USP restructuring (corporatisation or privatisation)</li> <li>5. Comp Increased competition among operators</li> <li>6. Subst Increased substitution competition (telcomm, internet, etc.)</li> <li>7. Demand Increased customer demands</li> <li>8. Tech Technological advances</li> <li>9. Other Other - use Explanatory Notes</li> </ol>
16. CNMktCpChg21	<p>• In your judgement, which has been the second most important factor responsible for this development? (select one)</p> <ol style="list-style-type: none"> <li>1. CompLib Liberalisation (reduction of the reserved area of USP)</li> <li>2. Reg Improved regulatory standards</li> <li>3. USP Improved USP operations</li> <li>4. Corp USP restructuring (corporatisation or privatisation)</li> <li>5. Comp Increased competition among operators</li> <li>6. Subst Increased substitution competition (telcomm, internet, etc.)</li> <li>7. Demand Increased customer demands</li> <li>8. Tech Technological advances</li> <li>9. Other Other - use Explanatory Notes</li> </ol>
17. CNMktCpChg31	<p>• In your judgement, which has been the third most important factor responsible for this development? (select one)</p> <ol style="list-style-type: none"> <li>1. CompLib Liberalisation (reduction of the reserved area of USP)</li> <li>2. Reg Improved regulatory standards</li> <li>3. USP Improved USP operations</li> <li>4. Corp USP restructuring (corporatisation or privatisation)</li> <li>5. Comp Increased competition among operators</li> <li>6. Subst Increased substitution competition (telcomm, internet, etc.)</li> <li>7. Demand Increased customer demands</li> <li>8. Tech Technological advances</li> <li>9. Other Other - use Explanatory Notes</li> </ol>
18. CNQosCpFut1	<p>Expected future development of the overall quality of parcel and express services in the next 5 years. (select one)</p> <ol style="list-style-type: none"> <li>1. 5 Considerable improvement</li> <li>2. 4 Improvement</li> <li>3. 3 No change</li> <li>4. 2 Worsening</li> <li>5. 1 Considerable worsening</li> <li>6. 0 No opinion</li> </ol>
19. CNCompLpPast1	<p>Has competition increased or decreased in the domestic letter mail segment in the last 5 years? (select one)</p> <ol style="list-style-type: none"> <li>1. 5 Strong increase</li> <li>2. 4 Slight increase</li> <li>3. 3 No change</li> <li>4. 2 Slight decrease</li> <li>5. 1 Strong decrease</li> <li>6. 0 No opinion</li> </ol>

255CN

20.	CNCompLpFut1	Expected future development of competition in the domestic letter mail segment in the next 5 years. (select one)
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
21.	CNCompCpPast1	Has competition increased or decreased in the domestic parcel and express segment in the last 5 years? (select one)
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
22.	CNCompCpFut1	Expected future development of competition in the domestic parcel and express segment in the next 5 years. (select one)
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
23.	CNCompEmp1	Please indicate the effect of competition in the postal sector on the employment level in the postal sector. (select one)
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
24.	CNCompWage1	Please indicate the effect of competition in the postal sector on the wage level in the postal sector. (select one)
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
25.	CNChgLp1	Expected future development of demand for letter services (excl. direct mail). (select one)
	1. SIncrease	Strong increase
	2. Increase	Slight increase
	3. No change	No change
	4. Decrease	Slight decrease
	5. SDecrease	Decrease
26.	CNChgDm1	Expected future development of demand for direct mail. (select one)
	1. SIncrease	Strong increase
	2. Increase	Slight increase

255CN

		3. No change	No change
		4. Decrease	Slight decrease
		5. SDecrease	Decrease
27.	CNChgCp1	Expected future development of demand for parcel services. (select one)	
		1. SIncrease	Strong increase
		2. Increase	Slight increase
		3. No change	No change
		4. Decrease	Slight decrease
		5. SDecrease	Decrease
28.	CNChgExp1	Expected future development of demand for express services. (select one)	
		1. SIncrease	Strong increase
		2. Increase	Slight increase
		3. No change	No change
		4. Decrease	Slight decrease
		5. SDecrease	Decrease
29.	CNPsBusFut1	Does your organisation expect that postal services would be more and more treated as normal business in the next 5 years? (yes/no)	
		.	
30.	CNPsComFut1	Does your institution expect an increase or decrease in importance of postal services as means of communication (items of correspondence) in the next 5 years. (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
31.	CNPsTransFut1	Does your institution expect an increase or decrease in importance of postal services as means of distribution (advertising and parcels) in the next 5 years? (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
32.	CNNotes1	Explanatory Notes: please include the number of questions referred to.	
		.	
101.	CNCty2	Country name (in case you are a market player in more than one national market)	
		.	
102.	CNMkt2	Please specify which postal services your organisation provides. (multi-select)	
		1. Lp	Letter services
		2. Cp	Parcel services
		3. Dx	Document exchange services
		4. Ex	Express services
		5. Cou	Courier services
		6. Ua	Distribution of unaddressed items
		7. Other	(see Notes below)
103.	CNPsType2	Please specify the geographical scope of postal services provided by your company. (select one)	

255CN

		<ul style="list-style-type: none"> <li>1. Dom Domestic postal services</li> <li>2. Cb Cross-border postal services</li> <li>3. DomCb Domestic and cross-border postal services</li> <li>4. Other (see Notes below)</li> </ul>
104.	CNType2	<p>Please specify the geographical area where your company provides domestic postal services, if any. (select one)</p> <ul style="list-style-type: none"> <li>1. Cty Whole country</li> <li>2. City Large cities only</li> <li>3. Urban All urban areas</li> <li>4. Other (see Notes below)</li> </ul>
105.	CNPsmkt2	<p>Please specify in which letter market segment(s) your organisation provides postal services, if any. (multi-select)</p> <ul style="list-style-type: none"> <li>1. None No provision of letter services</li> <li>2. Lp Items of correspondence excl. advertising mail</li> <li>3. Dm Advertising mail</li> <li>4. News Newspapers, magazines and other periodicals</li> <li>5. Other (see Notes below)</li> </ul>
106.	CNCust2	Does your company also provides postal services for residents (non-business mailer)? (yes/no)
107.	CNBox2	Does your company make use of letter boxes? (yes/no)
108.	CNPo2	How many outlets does your company have, if any?
109.	CNQosLpPast2	<p>How has the overall quality of domestic letter services available in the market changed over the last 5 years? (select one)</p> <ul style="list-style-type: none"> <li>1. 5 Considerable improvement</li> <li>2. 4 Improvement</li> <li>3. 3 No change</li> <li>4. 2 Worsening</li> <li>5. 1 Considerable worsening</li> <li>6. 0 No opinion</li> </ul>
110.	CNMktLpChg12	<p>• In your judgement, which has been the most important factor responsible for this development? (select one)</p> <ul style="list-style-type: none"> <li>1. CompLib Liberalisation (reduction of the reserved area of USP)</li> <li>2. Reg Improved regulatory standards</li> <li>3. USP Improved USP operations</li> <li>4. Corp USP restructuring (corporatisation or privatisation)</li> <li>5. Comp Increased competition among operators</li> <li>6. Subst Increased substitution competition (telcomm, internet, etc.)</li> <li>7. Demand Increased customer demands</li> <li>8. Tech Technological advances</li> <li>9. Other Other - use Explanatory Notes</li> </ul>
111.	CNMktLpChg22	<p>• In your judgement, which has been the second most important factor responsible for this development? (select one)</p> <ul style="list-style-type: none"> <li>1. CompLib Liberalisation (reduction of the reserved area of USP)</li> <li>2. Reg Improved regulatory standards</li> <li>3. USP Improved USP operations</li> <li>4. Corp USP restructuring (corporatisation or privatisation)</li> </ul>



255CN

		5. Comp	Increased competition among operators
		6. Subst	Increased substitution competition (telcomm, internet, etc.)
		7. Demand	Increased customer demands
		8. Tech	Technological advances
		9. Other	Other - use Explanatory Notes
112.	CNMktLpChg32	• In your judgement, which has been the third most important factor responsible for this development? (select one)	
		1. CompLib	Liberalisation (reduction of the reserved area of USP)
		2. Reg	Improved regulatory standards
		3. USP	Improved USP operations
		4. Corp	USP restructuring (corporatisation or privatisation)
		5. Comp	Increased competition among operators
		6. Subst	Increased substitution competition (telcomm, internet, etc.)
		7. Demand	Increased customer demands
		8. Tech	Technological advances
		9. Other	Other - use Explanatory Notes
113.	CNQosLpFut2	Expected future development of the overall quality of domestic letter services in the next 5 years. (select one)	
		1. 5	Considerable improvement
		2. 4	Improvement
		3. 3	No change
		4. 2	Worsening
		5. 1	Considerable worsening
		6. 0	No opinion
114.	CNQosCpPast2	How has the overall quality of domestic parcel and express services available in the market changed over the last 5 years? (select one)	
		1. 5	Considerable improvement
		2. 4	Improvement
		3. 3	No change
		4. 2	Worsening
		5. 1	Considerable worsening
		6. 0	No opinion
115.	CNMktCpChg12	• In your judgement, which has been the most important factor responsible for this development? (select one)	
		1. CompLib	Liberalisation (reduction of the reserved area of USP)
		2. Reg	Improved regulatory standards
		3. USP	Improved USP operations
		4. Corp	USP restructuring (corporatisation or privatisation)
		5. Comp	Increased competition among operators
		6. Subst	Increased substitution competition (telcomm, internet, etc.)
		7. Demand	Increased customer demands
		8. Tech	Technological advances
		9. Other	Other - use Explanatory Notes
116.	CNMktCpChg22	• In your judgement, which has been the second most important factor responsible for this development? (select one)	
		1. CompLib	Liberalisation (reduction of the reserved area of USP)
		2. Reg	Improved regulatory standards
		3. USP	Improved USP operations
		4. Corp	USP restructuring (corporatisation or privatisation)
		5. Comp	Increased competition among operators

255CN

		6. Subst	Increased substitution competition (telcomm, internet, etc.)
		7. Demand	Increased customer demands
		8. Tech	Technological advances
		9. Other	Other - use Explanatory Notes
117.	CNMktCpChg32	• In your judgement, which has been the third most important factor responsible for this development? (select one)	
		1. CompLib	Liberalisation (reduction of the reserved area of USP)
		2. Reg	Improved regulatory standards
		3. USP	Improved USP operations
		4. Corp	USP restructuring (corporatisation or privatisation)
		5. Comp	Increased competition among operators
		6. Subst	Increased substitution competition (telcomm, internet, etc.)
		7. Demand	Increased customer demands
		8. Tech	Technological advances
		9. Other	Other - use Explanatory Notes
118.	CNQosCpFut2	Expected future development of the overall quality of parcel and express services in the next 5 years. (select one)	
		1. 5	Considerable improvement
		2. 4	Improvement
		3. 3	No change
		4. 2	Worsening
		5. 1	Considerable worsening
		6. 0	No opinion
119.	CNCompLpPast2	Has competition increased or decreased in the domestic letter mail segment in the last 5 years? (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
120.	CNCompLpFut2	Expected future development of competition in the domestic letter mail segment in the next 5 years. (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
121.	CNCompCpPast2	Has competition increased or decreased in the domestic parcel and express segment in the last 5 years? (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
122.	CNCompCpFut2	Expected future development of competition in the domestic parcel and express segment in the next 5 years. (select one)	
		1. 5	Strong increase

255CN

		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
123.	CNCompEmp2	Please indicate the effect of competition in the postal sector on the employment level in the postal sector. (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
124.	CNCompWage2	Please indicate the effect of competition in the postal sector on the wage level in the postal sector. (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
125.	CNChgLp2	Expected future development of demand for letter services (excl. direct mail). (select one)	
		1. SIncrease	Strong increase
		2. Increase	Slight increase
		3. No change	No change
		4. Decrease	Slight decrease
		5. SDecrease	Decrease
126.	CNChgDm2	Expected future development of demand for direct mail. (select one)	
		1. SIncrease	Strong increase
		2. Increase	Slight increase
		3. No change	No change
		4. Decrease	Slight decrease
		5. SDecrease	Decrease
127.	CNChgCp2	Expected future development of demand for parcel services. (select one)	
		1. SIncrease	Strong increase
		2. Increase	Slight increase
		3. No change	No change
		4. Decrease	Slight decrease
		5. SDecrease	Decrease
128.	CNChgExp2	Expected future development of demand for express services. (select one)	
		1. SIncrease	Strong increase
		2. Increase	Slight increase
		3. No change	No change
		4. Decrease	Slight decrease
		5. SDecrease	Decrease
129.	CNPsBusFut2	Does your organisation expect that postal services would be more and more treated as normal business in the next 5 years? (yes/no)	

255CN

130.	CNPsComFut2	Does your institution expect an increase or decrease in importance of postal services as means of communication (items of correspondence) in the next 5 years. (select one)
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
131.	CNPsTransFut2	Does your institution expect an increase or decrease in importance of postal services as means of distribution (advertising and parcels) in the next 5 years? (select one)
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
132.	CNNNotes2	Explanatory Notes: please include the number of questions referred to.
201.	CNCty3	Country name (in case you are a market player in more than two national markets)
202.	CNMkt3	Please specify which postal services your organisation provides. (multi-select)
	1. Lp	Letter services
	2. Cp	Parcel services
	3. Dx	Document exchange services
	4. Ex	Express services
	5. Cou	Courier services
	6. Ua	Distribution of unaddressed items
	7. Other	(see Notes below)
203.	CNPstyp3	Please specify the geographical scope of postal services provided by your company. (select one)
	1. Dom	Domestic postal services
	2. Cb	Cross-border postal services
	3. DomCb	Domestic and cross-border postal services
	4. Other	(see Notes below)
204.	CNTyp3	Please specify the geographical area where your company provides domestic postal services, if any. (select one)
	1. Cty	Whole country
	2. City	Large cities only
	3. Urban	All urban areas
	4. Other	(see Notes below)
205.	CNPstMkt3	Please specify in which letter market segment(s) your organisation provides postal services, if any. (multi-select)
	1. None	No provision of letter services
	2. Lp	Items of correspondence excl. advertising mail
	3. Dm	Advertising mail
	4. News	Newspapers, magazines and other periodicals
	5. Other	(see Notes below)

255CN

206.	CNCust3	Does your company also provides postal services for residents (non-business mailer)? (yes/no)
207.	CNBox3	Does your company make use of letter boxes? (yes/no)
208.	CNPo3	How many outlets does your company have, if any?
209.	CNQosLpPast3	How has the overall quality of domestic letter services available in the market changed over the last 5 years? (select one) 1. 5 Considerable improvement 2. 4 Improvement 3. 3 No change 4. 2 Worsening 5. 1 Considerable worsening 6. 0 No opinion
210.	CNMktLpChg13	• In your judgement, which has been the most important factor responsible for this development? (select one) 1. CompLib Liberalisation (reduction of the reserved area of USP) 2. Reg Improved regulatory standards 3. USP Improved USP operations 4. Corp USP restructuring (corporatisation or privatisation) 5. Comp Increased competition among operators 6. Subst Increased substitution competition (telcomm, internet, etc.) 7. Demand Increased customer demands 8. Tech Technological advances 9. Other Other - use Explanatory Notes
211.	CNMktLpChg23	• In your judgement, which has been the second most important factor responsible for this development? (select one) 1. CompLib Liberalisation (reduction of the reserved area of USP) 2. Reg Improved regulatory standards 3. USP Improved USP operations 4. Corp USP restructuring (corporatisation or privatisation) 5. Comp Increased competition among operators 6. Subst Increased substitution competition (telcomm, internet, etc.) 7. Demand Increased customer demands 8. Tech Technological advances 9. Other Other - use Explanatory Notes
212.	CNMktLpChg33	• In your judgement, which has been the third most important factor responsible for this development? (select one) 1. CompLib Liberalisation (reduction of the reserved area of USP) 2. Reg Improved regulatory standards 3. USP Improved USP operations 4. Corp USP restructuring (corporatisation or privatisation) 5. Comp Increased competition among operators 6. Subst Increased substitution competition (telcomm, internet, etc.) 7. Demand Increased customer demands 8. Tech Technological advances 9. Other Other - use Explanatory Notes

255CN

213.	CNQoS LpFut3	Expected future development of the overall quality of domestic letter services in the next 5 years. (select one)
	1. 5	Considerable improvement
	2. 4	Improvement
	3. 3	No change
	4. 2	Worsening
	5. 1	Considerable worsening
	6. 0	No opinion
214.	CNQoS CpPast3	How has the overall quality of domestic parcel and express services available in the market changed over the last 5 years? (select one)
	1. 5	Considerable improvement
	2. 4	Improvement
	3. 3	No change
	4. 2	Worsening
	5. 1	Considerable worsening
	6. 0	No opinion
215.	CNMkt CpChg13	<ul style="list-style-type: none"> <li>• In your judgement, which has been the most important factor responsible for this development? (select one)</li> </ul>
	1. CompLib	Liberalisation (reduction of the reserved area of USP)
	2. Reg	Improved regulatory standards
	3. USP	Improved USP operations
	4. Corp	USP restructuring (corporatisation or privatisation)
	5. Comp	Increased competition among operators
	6. Subst	Increased substitution competition (telcomm, internet, etc.)
	7. Demand	Increased customer demands
	8. Tech	Technological advances
	9. Other	Other - use Explanatory Notes
216.	CNMkt CpChg23	<ul style="list-style-type: none"> <li>• In your judgement, which has been the second most important factor responsible for this development? (select one)</li> </ul>
	1. CompLib	Liberalisation (reduction of the reserved area of USP)
	2. Reg	Improved regulatory standards
	3. USP	Improved USP operations
	4. Corp	USP restructuring (corporatisation or privatisation)
	5. Comp	Increased competition among operators
	6. Subst	Increased substitution competition (telcomm, internet, etc.)
	7. Demand	Increased customer demands
	8. Tech	Technological advances
	9. Other	Other - use Explanatory Notes
217.	CNMkt CpChg33	<ul style="list-style-type: none"> <li>• In your judgement, which has been the third most important factor responsible for this development? (select one)</li> </ul>
	1. CompLib	Liberalisation (reduction of the reserved area of USP)
	2. Reg	Improved regulatory standards
	3. USP	Improved USP operations
	4. Corp	USP restructuring (corporatisation or privatisation)
	5. Comp	Increased competition among operators
	6. Subst	Increased substitution competition (telcomm, internet, etc.)
	7. Demand	Increased customer demands
	8. Tech	Technological advances
	9. Other	Other - use Explanatory Notes

255CN

218.	CNQosCpFut3	Expected future development of the overall quality of parcel and express services in the next 5 years. (select one)
	1. 5	Considerable improvement
	2. 4	Improvement
	3. 3	No change
	4. 2	Worsening
	5. 1	Considerable worsening
	6. 0	No opinion
219.	CNCompLpPast3	Has competition increased or decreased in the domestic letter mail segment in the last 5 years? (select one)
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
220.	CNCompLpFut3	Expected future development of competition in the domestic letter mail segment in the next 5 years. (select one)
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
221.	CNCompCpPast3	Has competition increased or decreased in the domestic parcel and express segment in the last 5 years? (select one)
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
222.	CNCompCpFut3	Expected future development of competition in the domestic parcel and express segment in the next 5 years. (select one)
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
223.	CNCompEmp3	Please indicate the effect of competition in the postal sector on the employment level in the postal sector. (select one)
	1. 5	Strong increase
	2. 4	Slight increase
	3. 3	No change
	4. 2	Slight decrease
	5. 1	Strong decrease
	6. 0	No opinion
224.	CNCompWage3	Please indicate the effect of competition in the postal sector on the wage level in the postal sector. (select one)

255CN

		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
225.	CNChgLp3	Expected future development of demand for letter services (excl. direct mail). (select one)	
		1. SIncrease	Strong increase
		2. Increase	Slight increase
		3. No change	No change
		4. Decrease	Slight decrease
		5. SDecrease	Decrease
226.	CNChgDm3	Expected future development of demand for direct mail. (select one)	
		1. SIncrease	Strong increase
		2. Increase	Slight increase
		3. No change	No change
		4. Decrease	Slight decrease
		5. SDecrease	Decrease
227.	CNChgCp3	Expected future development of demand for parcel services. (select one)	
		1. SIncrease	Strong increase
		2. Increase	Slight increase
		3. No change	No change
		4. Decrease	Slight decrease
		5. SDecrease	Decrease
228.	CNChgExp3	Expected future development of demand for express services. (select one)	
		1. SIncrease	Strong increase
		2. Increase	Slight increase
		3. No change	No change
		4. Decrease	Slight decrease
		5. SDecrease	Decrease
229.	CNPsBusFut3	Does your organisation expect that postal services would be more and more treated as normal business in the next 5 years? (yes/no)	
230.	CNPsComFut3	Does your institution expect an increase or decrease in importance of postal services as means of communication (items of correspondence) in the next 5 years. (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion
231.	CNPsTransFut3	Does your institution expect an increase or decrease in importance of postal services as means of distribution (advertising and parcels) in the next 5 years? (select one)	
		1. 5	Strong increase
		2. 4	Slight increase
		3. 3	No change
		4. 2	Slight decrease
		5. 1	Strong decrease
		6. 0	No opinion



255CN

---

232. CNNotes3

Explanatory Notes: please include the number of questions referred to.

301OP

**Question Module: 301OP Postal operators data**

0.	DOPYear	Year
1.	DOPFy	Day of the year on which the fiscal or reporting year ends (date)
2.	DOPFyAppl	• Is this fiscal or accounting year used for all annual data provided in this survey? (yes/no)
3.	DOPCur	Currency for annual financial figures (select one)
4.	DOPCurUnit	Unit of currency for annual financial figures, e.g. thousands (000), million (000 000) (select one) 1. Unit            Unit 2. Thou          Thousand 3. Mln            Million 4. Bln            Billion 5. Other          Other - pls specify
5.	DOP15States	Number of member states served at end of year, EU-15
6.	DOP15Offices	Number of permanent postal offices operated at end of year, EU-15
7.	DOP15Emp	Number of employees (postal services) at end of year (FTE), EU-15
8.	DOP15LpDom	Letter post items delivered, EU-15 domestic (000)
9.	DOP15LpCbo	Letter post items exported, EU-15 outbound international (000)
10.	DOP15LpCbi	Letter post items delivered, EU-15 inbound international (000)
11.	DOP15CPDom	Parcels delivered, EU-15 domestic (000)
12.	DOP15CPCbo	Parcels delivered, EU-15 outbound international (000)
13.	DOP15CPCbi	Parcels delivered, EU-15 inbound international (000)
14.	DOP15ExDom	Express items delivered, EU-15 domestic (000)
15.	DOP15ExCbo	Express items delivered, EU-15 outbound international (000)
16.	DOP15ExCbi	Express items delivered, EU-15 inbound international (000)

301OP

17.	DOP15DxDom	Document exchange volume, EU-15 (000)
18.	DOP15LpRev	Letter post revenues, EU-15
19.	DOP15CpRev	Parcels revenues, EU-15
20.	DOP15ExRev	Express revenues, EU-15
21.	DOP15DxRev	Document exchange revenues, EU-15
22.	DOP25States	Number of member states served at end of year, EU-25
23.	DOP25Offices	Number of permanent offices at end of year, EU-25
24.	DOP25Emp	Number of employees (postal services) at end of year (FTE), EU-25
25.	DOP25LpDom	Letter post items delivered, EU-25 domestic (000)
26.	DOP25LpCbo	Letter post items delivered, EU-25 outbound international (000)
27.	DOP25LpCbi	Letter post items delivered, EU-25 inbound international (000)
28.	DOP25CPDom	Parcels delivered, EU-25 domestic (000)
29.	DOP25CPCbo	Parcels delivered, EU-25 outbound international (000)
30.	DOP25CPCbi	Parcels delivered, EU-25 inbound international (000)
31.	DOP25ExDom	Express items delivered, EU-25 domestic (000)
32.	DOP25ExCbo	Express items delivered, EU-25 outbound international (000)
33.	DOP25ExCbi	Express items delivered, EU-25 inbound international (000)
34.	DOP25DxDom	Document exchange volume, EU-25 (000)
35.	DOP25LpRev	Letter post revenues, EU-25
36.	DOP25CpRev	Parcels revenues, EU-25
37.	DOP25ExRev	Express revenues, EU-25

3010P

38.	DOP25DxRev	Document exchange revenues, EU-25
39.	DOPNotes	Explanatory Notes: please include the number of questions referred to.
1005.	DOP15StatesZ	Data availability
1006.	DOP15OfficesZ	Data availability
1007.	DOP15EmpZ	Data availability
1008.	DOP15LpDomZ	Data availability
1009.	DOP15LpCboZ	Data availability
1010.	DOP15LpCbiZ	Data availability
1011.	DOP15CPDomZ	Data availability
1012.	DOP15CPCboZ	Data availability
1013.	DOP15CPCbiZ	Data availability
1014.	DOP15ExDomZ	Data availability
1015.	DOP15ExCboZ	Data availability
1016.	DOP15ExCbiZ	Data availability
1017.	DOP15DxDomZ	Data availability
1018.	DOP15LpRevZ	Data availability
1019.	DOP15CpRevZ	Data availability
1020.	DOP15ExRevZ	Data availability
1021.	DOP15DxRevZ	Data availability
1022.	DOP25StatesZ	Data availability

301OP

---

1023.	DOP25OfficesZ	Data availability
1024.	DOP25EmpZ	Data availability
1025.	DOP25LpDomZ	Data availability
1026.	DOP25LpCboZ	Data availability
1027.	DOP25LpCbiZ	Data availability
1028.	DOP25CPDomZ	Data availability
1029.	DOP25CPCboZ	Data availability
1030.	DOP25CPCbiZ	Data availability
1031.	DOP25ExDomZ	Data availability
1032.	DOP25ExCboZ	Data availability
1033.	DOP25ExCbiZ	Data availability
1034.	DOP25DxDomZ	Data availability
1035.	DOP25LpRevZ	Data availability
1036.	DOP25CpRevZ	Data availability
1037.	DOP25ExRevZ	Data availability
1038.	DOP25DxRevZ	Data availability

---

302MS

**Question Module: 302MS USP market share data**

0.	DMSYear	Year
1.	DMSPerLpDom	Perceived level of competition in domestic letter post market (select one) 1. 0 None 2. 1 Emerging 3. 2 Substantial 4. 3 Intense
2.	DMSPerLpCbo	Perceived level of competition in outbound cross border letter post market (select one) 1. 0 None 2. 1 Emerging 3. 2 Substantial 4. 3 Intense
3.	DMSPerCpDom	Perceived level of competition in domestic parcel market (select one) 1. 0 None 2. 1 Emerging 3. 2 Substantial 4. 3 Intense
4.	DMSPerCpCbo	Perceived level of competition in outbound cross border parcel market (select one) 1. 0 None 2. 1 Emerging 3. 2 Substantial 4. 3 Intense
5.	DMSPerExDom	Perceived level of competition in domestic express market (select one) 1. 0 None 2. 1 Emerging 3. 2 Substantial 4. 3 Intense
6.	DMSPerExCbo	Perceived level of competition in outbound cross border express market (select one) 1. 0 None 2. 1 Emerging 3. 2 Substantial 4. 3 Intense
7.	DMSPerDx	Perceived level of competition in document exchange market (select one) 1. 0 None 2. 1 Emerging 3. 2 Substantial 4. 3 Intense
8.	DMSPerJa	Perceived level of competition in unaddressed mail market (select one) 1. 0 None 2. 1 Emerging 3. 2 Substantial 4. 3 Intense
9.	DMSLpDom	Approximate USP share of domestic letter post market (by revenue) (select one)

302MS

1.	0	0 %
2.	2	2 %
3.	5	5 %
4.	10	10 %
5.	15	15 %
6.	20	20 %
7.	30	30 %
8.	40	40 %
9.	50	50 %
10.	60	60 %
11.	70	70 %
12.	80	80 %
13.	90	90 %
14.	95	95 %
15.	98	98 %
16.	100	100 %

---

10. DMSLpCbo      Approximate USP share of outbound cross border letter post market (by revenue) (select one)

1.	0	0 %
2.	2	2 %
3.	5	5 %
4.	10	10 %
5.	15	15 %
6.	20	20 %
7.	30	30 %
8.	40	40 %
9.	50	50 %
10.	60	60 %
11.	70	70 %
12.	80	80 %
13.	90	90 %
14.	95	95 %
15.	98	98 %
16.	100	100 %

---

11. DMSCpDom      Approximate USP share of domestic parcel market (by revenue) (select one)

1.	0	0 %
2.	2	2 %
3.	5	5 %
4.	10	10 %
5.	15	15 %
6.	20	20 %
7.	30	30 %
8.	40	40 %
9.	50	50 %
10.	60	60 %
11.	70	70 %
12.	80	80 %
13.	90	90 %
14.	95	95 %
15.	98	98 %
16.	100	100 %

302MS

---

12. DMSCpCbo	Approximate USP share of outbound cross border parcel market (by revenue) (select one)	
	1. 0	0 %
	2. 2	2 %
	3. 5	5 %
	4. 10	10 %
	5. 15	15 %
	6. 20	20 %
	7. 30	30 %
	8. 40	40 %
	9. 50	50 %
	10. 60	60 %
	11. 70	70 %
	12. 80	80 %
	13. 90	90 %
	14. 95	95 %
	15. 98	98 %
	16. 100	100 %

---

13. DMSExDom	Approximate USP share of domestic express market (by revenue) (select one)	
	1. 0	0 %
	2. 2	2 %
	3. 5	5 %
	4. 10	10 %
	5. 15	15 %
	6. 20	20 %
	7. 30	30 %
	8. 40	40 %
	9. 50	50 %
	10. 60	60 %
	11. 70	70 %
	12. 80	80 %
	13. 90	90 %
	14. 95	95 %
	15. 98	98 %
	16. 100	100 %

---

14. DMSExCbo	Approximate USP share of outbound cross border express market (by revenue) (select one)	
	1. 0	0 %
	2. 2	2 %
	3. 5	5 %
	4. 10	10 %
	5. 15	15 %
	6. 20	20 %
	7. 30	30 %
	8. 40	40 %
	9. 50	50 %
	10. 60	60 %
	11. 70	70 %
	12. 80	80 %
	13. 90	90 %
	14. 95	95 %
	15. 98	98 %



302MS

	16. 100	100 %
15. DMSDx	Approximate USP share of document exchange market (by revenue) (select one)	
	1. 0	0 %
	2. 2	2 %
	3. 5	5 %
	4. 10	10 %
	5. 15	15 %
	6. 20	20 %
	7. 30	30 %
	8. 40	40 %
	9. 50	50 %
	10. 60	60 %
	11. 70	70 %
	12. 80	80 %
	13. 90	90 %
	14. 95	95 %
	15. 98	98 %
	16. 100	100 %
16. DMSUa	Approximate USP share of unaddressed mail market (by revenue) (select one)	
	1. 0	0 %
	2. 2	2 %
	3. 5	5 %
	4. 10	10 %
	5. 15	15 %
	6. 20	20 %
	7. 30	30 %
	8. 40	40 %
	9. 50	50 %
	10. 60	60 %
	11. 70	70 %
	12. 80	80 %
	13. 90	90 %
	14. 95	95 %
	15. 98	98 %
	16. 100	100 %
17. DMSNotes	Explanatory Notes: please include the number of questions referred to.	
1009. DMSLpDomZ	Data availability	
1010. DMSLpCboZ	Data availability	
1011. DMSCpDomZ	Data availability	
1012. DMSCpCboZ	Data availability	
1013. DMSExDomZ	Data availability	

302MS

---

1014.	DMSExCboZ	Data availability
<hr/>		
1015.	DMSDxZ	Data availability
<hr/>		
1016.	DMSUaZ	Data availability

311UP

**Question Module: 311UP USP corporate data**

0. DUPYear	Year																																
1. DUPCty	Primary country for which operator was obliged to provide universal service during year (select one)																																
2. DUPCty2d	Was the operator obliged to provide universal service in more than one country in year? (yes/no)																																
3. DUPCur	Currency for annual financial figures (select one)																																
4. DUPCurUnit	Unit of currency for annual financial figures, e.g. thousands (000), million (000 000) (select one) <table border="0"> <tr> <td>1. Unit</td> <td>Unit</td> </tr> <tr> <td>2. Thou</td> <td>Thousand</td> </tr> <tr> <td>3. Mln</td> <td>Million</td> </tr> <tr> <td>4. Bln</td> <td>Billion</td> </tr> <tr> <td>5. Other</td> <td>Other - pls specify</td> </tr> </table>	1. Unit	Unit	2. Thou	Thousand	3. Mln	Million	4. Bln	Billion	5. Other	Other - pls specify																						
1. Unit	Unit																																
2. Thou	Thousand																																
3. Mln	Million																																
4. Bln	Billion																																
5. Other	Other - pls specify																																
5. DUPServs	Substantial commercial activities of the USP (multi-select - see instructions) <table border="0"> <tr> <td>1. Lp</td> <td>Letter post</td> </tr> <tr> <td>2. Cp</td> <td>Parcels</td> </tr> <tr> <td>3. Ex</td> <td>Express</td> </tr> <tr> <td>4. Unaddr</td> <td>Unaddr delivery</td> </tr> <tr> <td>5. Freight</td> <td>Freight</td> </tr> <tr> <td>6. Postbank</td> <td>Post bank</td> </tr> <tr> <td>7. Finance</td> <td>Finance</td> </tr> <tr> <td>8. Printing</td> <td>Printing</td> </tr> <tr> <td>9. MailPrep</td> <td>Mail prep</td> </tr> <tr> <td>10. Retail</td> <td>Retail</td> </tr> <tr> <td>11. Internet</td> <td>Internet</td> </tr> <tr> <td>12. Hybrid</td> <td>Hybrid mail</td> </tr> <tr> <td>13. Email</td> <td>Email</td> </tr> <tr> <td>14. Mailroom</td> <td>Mailroom mgmt</td> </tr> <tr> <td>15. Advertising</td> <td>Advertising</td> </tr> <tr> <td>16. Other</td> <td>(see Notes below)</td> </tr> </table>	1. Lp	Letter post	2. Cp	Parcels	3. Ex	Express	4. Unaddr	Unaddr delivery	5. Freight	Freight	6. Postbank	Post bank	7. Finance	Finance	8. Printing	Printing	9. MailPrep	Mail prep	10. Retail	Retail	11. Internet	Internet	12. Hybrid	Hybrid mail	13. Email	Email	14. Mailroom	Mailroom mgmt	15. Advertising	Advertising	16. Other	(see Notes below)
1. Lp	Letter post																																
2. Cp	Parcels																																
3. Ex	Express																																
4. Unaddr	Unaddr delivery																																
5. Freight	Freight																																
6. Postbank	Post bank																																
7. Finance	Finance																																
8. Printing	Printing																																
9. MailPrep	Mail prep																																
10. Retail	Retail																																
11. Internet	Internet																																
12. Hybrid	Hybrid mail																																
13. Email	Email																																
14. Mailroom	Mailroom mgmt																																
15. Advertising	Advertising																																
16. Other	(see Notes below)																																
6. DUPRev	Revenues of USP																																
7. DUPRevPs	• Revenue from postal services																																
8. DUPRevUa	• Revenue from unaddressed mail services, domestic																																
9. DUPRevFs	• Revenue from financial services																																
10. DUPRevGov	• Revenue from non-postal services provided for the government																																

311UP

11.	DUPRevCom	• Revenues from other commercial services
12.	DUPRevSub	• Subsidy from government
13.	DUPExp	Expenses of USP
14.	DUPExpOp	• Operating expenses
15.	DUPExpEmp	• • Wages and benefits
16.	DUPExpRd	• • Research and development
17.	DUPAssets	Assets at year end
18.	DUPLiabil	Liabilities less shareholders equity, if any, at year end
19.	DUPAcqNum	Number of companies acquired (ownership raised to more than 50%)
20.	DUPAcqVal	Value of companies acquired (ownership raised to more than 50%)
21.	DUPSoldNum	Number of companies sold (ownership reduced to less than 50%)
22.	DUPSoldVal	Value of companies sold (ownership reduced to less than 50%)
23.	DUPHdEndAvgY	Employment data provided as year's average or for end of year? 1. End            Year end 2. Avg            Year's average
24.	DUPHd	Total number of staff (headcount)
25.	DUPHdPs	• Staff employed in production of postal services (headcount)
26.	DUPHdCiv	• Staff who are civil servants (headcount)
27.	DUPHdFem	• Female staff (headcount)
28.	DUPHdTmp	• Temporary staff (headcount)
29.	DUPHdEp	• Staff employed abroad (headcount)
30.	DUPFte	Total number of staff (FTE)

311UP

31.	DUPFtePs	• Staff employed in production of postal services (FTE)
32.	DUPFteCiv	• Staff who are civil servants (FTE)
33.	DUPFteFem	• Female staff (FTE)
34.	DUPFteTmp	• Temporary staff (FTE)
35.	DUPFteEp	• Staff employed abroad (FTE)
36.	DUPPat	Number of patents obtained by the USP
37.	DUPPatPs	• Number of patents obtained by the USP related to the production of postal services
38.	DUPNotes	Explanatory Notes: please include the number of questions referred to.
1005.	DUPServsZ	Data availability
1006.	DUPRevZ	Data availability
1007.	DUPRevPsZ	Data availability
1008.	DUPRevUaZ	Data availability
1009.	DUPRevFsZ	Data availability
1010.	DUPRevGovZ	Data availability
1011.	DUPRevComZ	Data availability
1012.	DUPRevSubZ	Data availability
1013.	DUPExpZ	Data availability
1014.	DUPExpOpZ	Data availability
1015.	DUPExpEmpZ	Data availability
1016.	DUPExpRdZ	Data availability

311UP

1017.	DUPAssetsZ	Data availability
1018.	DUPLiabilZ	Data availability
1019.	DUPAcqNumZ	Data availability
1020.	DUPAcqValZ	Data availability
1021.	DUPSoldNumZ	Data availability
1022.	DUPSoldValZ	Data availability
1024.	DUPHdZ	Data availability
1025.	DUPHdPsZ	Data availability
1026.	DUPHdCivZ	Data availability
1027.	DUPHdFemZ	Data availability
1028.	DUPHdTmpZ	Data availability
1029.	DUPHdEpZ	Data availability
1030.	DUPFteZ	Data availability
1031.	DUPFtePsZ	Data availability
1032.	DUPFteCivZ	Data availability
1033.	DUPFteFemZ	Data availability
1034.	DUPFteTmpZ	Data availability
1035.	DUPFteEpZ	Data availability
1036.	DUPPatZ	Data availability
1037.	DUPPatPsZ	Data availability

321US

**Question Module: 321US USP universal service data**

0.	DUSYear	Year
1.	DUSDeID1	Percent of postal items in fastest standard category delivered within D+1
2.	DUSDeID2	Percent of postal items in fastest standard category delivered within D+2
3.	DUSDeID3	Percent of postal items in fastest standard category delivered within D+3
4.	DUSDeID4	Percent of postal items in fastest standard category delivered within D+4
5.	DUSDeID5	Percent of postal items in fastest standard category delivered within D+5
6.	DUSNumPo	Total number of post offices [UPU 3.1]
7.	DUSNumPoUsp	• Number of post offices operated by USP [UPU 3.2]
8.	DUSNumPoAgt	• Number of post offices operated for USP by others [UPU 3.3]
9.	DUSNumPoMob	• Number of mobile post offices [UPU 3.6]
10.	DUSNumBoxes	Number of public post collection boxes [UPU 6.3]
11.	DUSNumCpl	Number of formal complaints filed with USP
12.	DUSNumCplRed	• Number of complaints resulting in reimbursement or compensation for complainant
13.	DUSNumCplApp	Number of complaints appealed to competent national authority
14.	DUSCplPub	USP published information on complaints by users and consumers (yes/no)?
15.	DUSNotes	Explanatory Notes: please include the number of questions referred to.
1001.	DUSDeID1Z	Data availability
1002.	DUSDeID2Z	Data availability
1003.	DUSDeID3Z	Data availability

321US

---

1004.	DUSDeID4Z	Data availability
1005.	DUSDeID5Z	Data availability
1006.	DUSNumPoZ	Data availability
1007.	DUSNumPoUspZ	Data availability
1008.	DUSNumPoAgtZ	Data availability
1009.	DUSNumPoMobZ	Data availability
1010.	DUSNumBoxesZ	Data availability
1011.	DUSNumCplZ	Data availability
1012.	DUSNumCplRedZ	Data availability
1013.	DUSNumClpAppZ	Data availability
1014.	DUSCplPubZ	Data availability

---



322PR

**Question Module: 322PR USP universal service prices**

0. DPRYear	Year
1. DPRCur	Currency used for public tariff figures in this question module (select one)
2. DPRFsc	Public tariff for correspondence in the first weight step of fastest standard category (FSC), end of fiscal year (number)
3. DPRFscChg	Date of change, if any, in tariff for FSC (date)
4. DPRSsc	Public tariff for correspondence in first weight step of second fastest standard category, if any, end of fiscal year (number)
5. DPRSscPct	• Approximate percent of correspondence using second fastest standard category, if applicable (percent)
6. DPRCor0	Public tariff for correspondence sent by FSC: 0 - 10 grams
7. DPRCor10	Public tariff for correspondence sent by FSC: 10 - 20 grams
8. DPRCor20	Public tariff for correspondence sent by FSC: 20 - 25 grams
9. DPRCor25	Public tariff for correspondence sent by FSC: 25 - 30 grams
10. DPRCor30	Public tariff for correspondence sent by FSC: 30 - 40 grams
11. DPRCor40	Public tariff for correspondence sent by FSC: 40 - 50 grams
12. DPRCor50	Public tariff for correspondence sent by FSC: 50 - 60 grams
13. DPRCor60	Public tariff for correspondence sent by FSC: 60 - 75 grams
14. DPRCor75	Public tariff for correspondence sent by FSC: 75 - 80 grams
15. DPRCor80	Public tariff for correspondence sent by FSC: 80 - 100 grams
16. DPRCor100	Public tariff for correspondence sent by FSC: 100 - 120 grams
17. DPRCor120	Public tariff for correspondence sent by FSC: 120 - 125 grams

322PR

18.	DPRCor125	Public tariff for correspondence sent by FSC: 125 - 140 grams
19.	DPRCor140	Public tariff for correspondence sent by FSC: 140 - 150 grams
20.	DPRCor150	Public tariff for correspondence sent by FSC: 150 - 160 grams
21.	DPRCor160	Public tariff for correspondence sent by FSC: 160 - 180 grams
22.	DPRCor180	Public tariff for correspondence sent by FSC: 180 - 200 grams
23.	DPRCor200	Public tariff for correspondence sent by FSC: 200 - 220 grams
24.	DPRCor220	Public tariff for correspondence sent by FSC: 220 - 240 grams
25.	DPRCor240	Public tariff for correspondence sent by FSC: 240 - 250 grams
26.	DPRCor250	Public tariff for correspondence sent by FSC: 250 - 260 grams
27.	DPRCor260	Public tariff for correspondence sent by FSC: 260 - 280 grams
28.	DPRCor280	Public tariff for correspondence sent by FSC: 280 - 300 grams
29.	DPRCor300	Public tariff for correspondence sent by FSC: 300 - 350 grams
30.	DPRCor350	Public tariff for correspondence sent by FSC: 350 - 400 grams
31.	DPRCor400	Public tariff for correspondence sent by FSC: 400 - 450 grams
32.	DPRCor450	Public tariff for correspondence sent by FSC: 450 - 500 grams
33.	DPRCor500	Public tariff for correspondence sent by FSC: 500 - 600 grams
34.	DPRCor600	Public tariff for correspondence sent by FSC: 600 - 700 grams
35.	DPRCor700	Public tariff for correspondence sent by FSC: 700 - 750 grams
36.	DPRCor750	Public tariff for correspondence sent by FSC: 750 - 800 grams
37.	DPRCor800	Public tariff for correspondence sent by FSC: 800 - 900 grams
38.	DPRCor900	Public tariff for correspondence sent by FSC: 900 - 1000 grams

322PR

39.	DPRCor1000	Public tariff for correspondence sent by FSC: 1000 - 1250 grams
40.	DPRCor1250	Public tariff for correspondence sent by FSC: 1250 - 1500 grams
41.	DPRCor1500	Public tariff for correspondence sent by FSC: 1500 - 1750 grams
42.	DPRCor1750	Public tariff for correspondence sent by FSC: 1750 - 2000 grams
43.	DPRCorEU20L	Public tariff for correspondence sent by FSC: 20 grams, to EU-15 (lowest)
44.	DPRCorEU20H	Public tariff for correspondence sent by FSC: 20 grams, to EU-15 (highest)
45.	DPRCorEU50L	Public tariff for correspondence sent by FSC: 50 grams, to EU-15 (lowest)
46.	DPRCorEU50H	Public tariff for correspondence sent by FSC: 50 grams, to EU-15 (highest)
47.	DPRDmEU20	Public tariff for direct mail send by second fastest standard category (if applicable) in a tender of 1000 items: 20 grams
48.	DPRDmEU50	Public tariff for direct mail send by second fastest standard category (if applicable) in a tender of 1000 items: 50 grams
49.	DPRDmEU250	Public tariff for direct mail send by second fastest standard category (if applicable) in a tender of 1000 items: 250 grams
50.	DPRCp2L	Public tariff for a single parcel: 2 kg (lowest)
51.	DPRCp2H	Public tariff for a single parcel: 2 kg (highest)
52.	DPRCp5L	Public tariff for a single parcel: 5 kg (lowest)
53.	DPRCp5H	Public tariff for a single parcel: 5 kg (highest)
54.	DPRCp10L	Public tariff for a single parcel: 10 kg (lowest)
55.	DPRCp10H	Public tariff for a single parcel: 10 kg (highest)
56.	DPRCpEu2L	Public tariff for a single parcel sent to EU-15: 2 kg (lowest)
57.	DPRCpEu2H	Public tariff for a single parcel sent to EU-15: 2 kg (highest)

322PR

---

58.	DPRCpEu5L	Public tariff for a single parcel sent to EU-15: 5 kg (lowest)
<hr/>		
59.	DPRCpEu5H	Public tariff for a single parcel sent to EU-15: 5 kg (highest)
<hr/>		
60.	DPRCpEu10L	Public tariff for a single parcel sent to EU-15: 10 kg (lowest)
<hr/>		
61.	DPRCpEu10H	Public tariff for a single parcel sent to EU-15: 10 kg (highest)
<hr/>		
62.	DPRNotes	Explanatory Notes: please include the number of questions referred to.

323VO

**Question Module: 323VO USP postal volumes data**

0.	DVOYear	Year
1.	DVOLpDom	Letter post items, domestic service (000)
2.	DVOLpDomloc	• Correspondence, domestic (000)
3.	DVOLpDomlocU	•• Correspondence, domestic, unreserved (000)
4.	DVOLpDomDm	• Direct mail items, domestic service (000)
5.	DVOLpDomDmU	•• Direct mail items, domestic service, unreserved (000)
6.	DVOLpCbo	Letter post items, outbound cross border service (000)
7.	DVOLpCboloc	• Correspondence, outbound cross border (000)
8.	DVOLpCbolocU	•• Correspondence, outbound cross border, unreserved (000)
9.	DVOLpCboDm	• Direct mail items, outbound cross border service (000)
10.	DVOLpCboDmU	•• Direct mail items, outbound cross border service, unreserved (000)
11.	DVOLpCboEU15	• Letter post items, outbound cross border, sent to EU-15 (000)
12.	DVOLpCboEU25	• Letter post items, outbound cross border, sent to EU-25 (000)
13.	DVOLpCbi	Letter post items, inbound cross border service (000)
14.	DVOLpCbiloc	• Correspondence, inbound cross border (000)
15.	DVOLpCbilocU	•• Correspondence, inbound cross border, unreserved (000)
16.	DVOLpCbiDm	• Direct mail items, inbound cross border service (000)
17.	DVOLpCbiDmU	•• Direct mail items, inbound cross border service, unreserved (000)
18.	DVOLpCbiEU15	• Letter post items, inbound cross border, from EU-15 (000)

323VO

19.	DVOLpCbiEU25	• Letter post items, inbound cross border, from EU-25 (000)
20.	DVOCpDom	Parcels, domestic service (000)
21.	DVOCpDomN	• Parcels, domestic service, non-universal (000)
22.	DVOCpCbo	Parcels, outbound cross border service (000)
23.	DVOCpCboN	• Parcels, outbound cross border service, non-universal (000)
24.	DVOCpCboEU15	• Parcels, outbound cross border, sent to EU-15 (000)
25.	DVOCpCboEU25	• Parcels, outbound cross border, sent to EU-25 (000)
26.	DVOCpCbi	Parcels, inbound cross border service (000)
27.	DVOCpCbiN	• Parcels, inbound cross border service, non-universal (000)
28.	DVOCpCbiEU15	• Parcels, inbound cross border, sent to EU-15 (000)
29.	DVOCpCbiEU25	• Parcels, inbound cross border, sent to EU-25 (000)
30.	DVOExDom	Express items, domestic service (000)
31.	DVOExCbo	Express items, outbound cross border service (000)
32.	DVOExCbi	Express items, inbound cross border service (000)
33.	DVODx	Document exchange items (000)
34.	DVOUa	Unaddressed mail items (000)
35.	DVOLpCboWt	Weight of letter post items, outbound cross border service in kg (000)
36.	DVOLpCboWtEU15	• Weight of letter post items, outbound cross border, sent to EU-15 in kg (000)
37.	DVOLpCboWtEU25	• Weight of letter post items, outbound cross border, sent to EU-25 in kg (000)
38.	DVOLpCbiWt	Weight of letter post items, inbound cross border service in kg (000)
39.	DVOLpCbiWtEU15	• Weight of letter post items, inbound cross border, from EU-15 in kg (000)

323VO

40.	DVOLpCbiWtEU25	• Weight of letter post items, inbound cross border, from EU-25 in kg (000)
41.	DVOCpCboWt	Weight of parcels, outbound cross border service in kg (000)
42.	DVOCpCboWtEU15	• Weight of parcels, outbound cross border service, sent to EU-15 in kg (000)
43.	DVOCpCboWtEU25	• Weight of parcels, outbound cross border service, sent to EU-25 in kg (000)
44.	DVOCpCbiWt	Weight of parcels, inbound cross border service in kg (000)
45.	DVOCpCbiWtEU15	• Weight of parcels, inbound cross border service, from EU-15 in kg (000)
46.	DVOCpCbiWtEU25	• Weight of parcels, inbound cross border service, from EU-25 in kg (000)
47.	DVONotes	Explanatory Notes: please include the number of questions referred to.
1001.	DVOLpDomZ	Data availability
1002.	DVOLpDomlocZ	Data availability
1003.	DVOLpDomlocUZ	Data availability
1004.	DVOLpDomDmZ	Data availability
1005.	DVOLpDomDmUZ	Data availability
1006.	DVOLpCboZ	Data availability
1007.	DVOLpCbolocZ	Data availability
1008.	DVOLpCbolocUZ	Data availability
1009.	DVOLpCboDmZ	Data availability
1010.	DVOLpCboDmUZ	Data availability
1011.	DVOLpCboEU15Z	Data availability
1012.	DVOLpCboEU25Z	Data availability

323VO

1013.	DVOLpCbiZ	Data availability
1014.	DVOLpCbilocZ	Data availability
1015.	DVOLpCbilocUZ	Data availability
1016.	DVOLpCbiDmZ	Data availability
1017.	DVOLpCbiDmUZ	Data availability
1018.	DVOLpCbiEU15Z	Data availability
1019.	DVOLpCbiEU25Z	Data availability
1020.	DVOCpDomZ	Data availability
1021.	DVOCpDomNZ	Data availability
1022.	DVOCpCboZ	Data availability
1023.	DVOCpCboNZ	Data availability
1024.	DVOCpCboEU15Z	Data availability
1025.	DVOCpCboEU25Z	Data availability
1026.	DVOCpCbiZ	Data availability
1027.	DVOCpCbiNZ	Data availability
1028.	DVOCpCbiEU15Z	Data availability
1029.	DVOCpCbiEU25Z	Data availability
1030.	DVOExDomZ	Data availability
1031.	DVOExCboZ	Data availability
1032.	DVOExCbiZ	Data availability
1033.	DVODxZ	Data availability



323VO

---

1034.	DVOUaZ	Data availability
-------	--------	-------------------

---

1035.	DVOLpCboWtZ	Data availability
-------	-------------	-------------------

---

1036.	DVOLpCboWtEU15Z	Data availability
-------	-----------------	-------------------

---

1037.	DVOLpCboWtEU25Z	Data availability
-------	-----------------	-------------------

---

1038.	DVOLpCbiWtZ	Data availability
-------	-------------	-------------------

---

1039.	DVOLpCbiWtEU15Z	Data availability
-------	-----------------	-------------------

---

1040.	DVOLpCbiWtEU25Z	Data availability
-------	-----------------	-------------------

---

1041.	DVOCpCboWtZ	Data availability
-------	-------------	-------------------

---

1042.	DVOCpCboWtEU15Z	Data availability
-------	-----------------	-------------------

---

1043.	DVOCpCboWtEU25Z	Data availability
-------	-----------------	-------------------

---

1044.	DVOCpCbiWtZ	Data availability
-------	-------------	-------------------

---

1045.	DVOCpCbiWtEU15Z	Data availability
-------	-----------------	-------------------

---

1046.	DVOCpCbiWtEU25Z	Data availability
-------	-----------------	-------------------

---

324RV

**Question Module: 324RV USP postal revenue and cost data**

0. DRVYear	Year
1. DRVCur	Currency for annual financial figures (select one)
2. DRVCurUnit	Unit of currency for annual financial figures, e.g. thousands (000), million (000 000) (select one) 1. Unit            Unit 2. Thou          Thousand 3. Mln            Million 4. Bln            Billion 5. Other          Other - pls specify
3. DRVPs	Revenue from postal services
4. DRVLp	• Revenue from all letter post services
5. DRVLpDom	•• Revenue from letter post services, domestic services
6. DRVLpDomU	••• Revenue from letter post services, domestic services, unreserved
7. DRVLpCbo	•• Revenue from letter post services, outbound cross border services
8. DRVLpCboU	••• Revenue from letter post services, outbound cross border services, unreserved
9. DRVLpCbi	•• Revenue from letter post services, inbound cross border services
10. DRVLpCbiU	•• Revenue from letter post services, inbound cross border services, unreserved
11. DRVCp	• Revenue from parcel services
12. DRVCpDom	•• Revenue from parcel services, domestic services
13. DRVCpDomN	••• Revenue from parcel services, domestic services, non-universal
14. DRVCpCbo	•• Revenue from parcel services, outbound cross border services
15. DRVCpCboN	••• Revenue from parcel services, outbound cross border services, non-universal
16. DRVCpCbi	•• Revenue from parcel services, inbound cross border services

324RV

17.	DRVCpCbiN	••• Revenue from parcel services, inbound cross border services, non-universal
18.	DRVEx	• Revenue for express services
19.	DRVExDom	•• Revenue from express services, domestic
20.	DRVExCbo	•• Revenue from express services, outbound cross border
21.	DRVExCbi	•• Revenue from express services, inbound cross border
22.	DRVDx	• Revenue from document exchange services
23.	DRVOth	• Any postal service revenue other than letter post, parcel, express, and document exchange? (yes/no)
24.	DRVExpOp	Operating expenses in the production of postal services
25.	DRVExpEmp	• Wages and benefits in production of postal services
26.	DRVExpTd	• Terminal dues expenses
27.	DRVExpRd	• Research and development expenses relating to postal service
28.	DRVNotes	Explanatory Notes: please include the number of questions referred to.
1003.	DRVPsZ	Data availability
1004.	DRVlpZ	Data availability
1005.	DRVlpDomZ	Data availability
1006.	DRVlpDomUZ	Data availability
1007.	DRVlpCboZ	Data availability
1008.	DRVlpCboUZ	Data availability
1009.	DRVlpCbiZ	Data availability
1010.	DRVlpCbiUZ	Data availability

324RV

1011.	DRVCpZ	Data availability
1012.	DRVCpDomZ	Data availability
1013.	DRVCpDomNZ	Data availability
1014.	DRVCpCboZ	Data availability
1015.	DRVCpCboNZ	Data availability
1016.	DRVCpCbiZ	Data availability
1017.	DRVCpCbiNZ	Data availability
1018.	DRVExZ	Data availability
1019.	DRVExDomZ	Data availability
1020.	DRVExCboZ	Data availability
1021.	DRVExCbiZ	Data availability
1022.	DRVDxZ	Data availability
1023.	DRVOthZ	Data availability
1024.	DRVExpOpZ	Data availability
1025.	DRVExpEmpZ	Data availability
1026.	DRVExpTdZ	Data availability
1027.	DRVExpOthZ	Data availability

331NR

**Question Module: 331NR National regulatory authority data**

0. DNRYear	Year
1. DNRFy	Day of the year on which the fiscal or reporting year ends (date)
2. DNRFyAppl	• Is this fiscal or accounting year used for all annual data provided in this survey? (yes/no)
3. DNRNraFunc	Did an independent postal NRA function for the entire year? (yes/no)
4. DNRNra2d	Was there more than one NRA designated at year end? (yes/no)
5. DNRNraEmp	Number of staff regulating postal services at year end (FTE)
6. DNRNraEmpPro	• Number of professional staff of regulating postal services at year end (FTE)
7. DNRCur	Currency for annual financial figures (select one)
8. DNRCurUnit	Unit of currency for annual financial figures, e.g. thousands (000), million (000 000) (select one) 1. Unit            Unit 2. Thou          Thousand 3. Mln            Million 4. Bln            Billion 5. Other          Other - pls specify
9. DNRNraExp	Annual expense of NRA for postal regulation
10. DNRUsp	Was there a government-designated universal service provider at year end? (yes/no)
11. DNRUspNum	Number of USPs designated at year end
12. DNRNuvsGa	Number of non-USP operators providing non-universal service by authorisation, year end
13. DNRUvsGa	Number of non-USP operators providing universal service by authorisation, year end
14. DNRUvsLic	Number of non-USP operators providing universal service by licence, year end
15. DNRCsRate	Number of formal NRA investigations begun in respect to public tariffs
16. DNRCsSpec	Number of formal NRA investigations begun in respect to special tariffs

331NR

17.	DNRCSsub	Number of formal NRA investigations begun in respect to cross subsidy
18.	DNRCStd	Number of formal NRA investigations begun in respect to terminal dues
19.	DNRSusArt14	Did the NRA suspend Article 14(2) to 14(7) of the Directive for year? (yes/no)
20.	DNRActRes	Did the USP produce annual accounts separating reserved and unreserved services? (yes/no)
21.	DNRActUvs	Did the USP produce annual accounts separating universal and nonuniversal services? (yes/no)
22.	DNRCostAvail	Was there in place a cost allocation system approved by NRA? (yes/no)
23.	DNRCostUsed	Did the USP produce annual accounts allocating costs according to a system approved by NRA? (yes/no)
24.	DNRCostInd	Did a competent body verify USP compliance with the cost allocation system approved by the NRA? (yes/no)
25.	DNRActInd	Were USP's annual accounts reviewed by an independent auditor? (yes/no)
26.	DNRActPub	Were the USP's annual accounts published? (yes/no)
27.	DNRQosYr	Did the government set quality of service standards for entire year? (yes/no)
28.	DNRQosPub	Were quality of service standards published by government? (yes/no)
29.	DNRQosInd	Was USP performance of universal service subject to independent monitoring for the entire year? (yes/no)
30.	DNRQosIndPub	Was the results of independent performance monitoring published? (yes/no)
31.	DNRQosTrgD1	D+1 standard for year (% of FSC items delivered - see instructions)
32.	DNRQosTrgD2	D+2 standard for year (% of FSC items delivered - see instructions)
33.	DNRQosTrgD3	D+3 standard for year (% of FSC items delivered - see instructions)
34.	DNRQosTrgD4	D+4 standard for year (% of FSC items delivered - see instructions)
35.	DNRQosTrgD5	D+5 standard for year (% of FSC items delivered - see instructions)

331NR

36.	DNRQosDelD1	Monitored D+1 performance for year (% of FSC items delivered - see instructions)
37.	DNRQosDelD2	Monitored D+2 performance for year (% of FSC items delivered - see instructions)
38.	DNRQosDelD3	Monitored D+3 performance for year (% of FSC items delivered - see instructions)
39.	DNRQosDelD4	Monitored D+4 performance for year (% of FSC items delivered - see instructions)
40.	DNRQosDelD5	Monitored D+5 performance for year (% of FSC items delivered - see instructions)
41.	DNRCplPub	Did the USP publish information on complaints by users and consumers for the year (yes/no)?
42.	DNRCplApp	Number of user or consumer complaints brought before competent national authorities?
43.	DNRNotes	Explanatory Notes: please include the number of questions referred to.





---

**- Appendix B -**  
Regulatory Part

---



## List of Tables

### 1 Overview of regulatory framework

Table 1	Summary of postal laws
Table 2	History of postal laws since 1997
Table 3	Postal regulations in force
Table 4	Ministries responsible for postal sector
Table 5	Responsibility for policymaking functions under the Directive
Table 6	Responsibility for administrative functions under the Directive

### 2 Universal service

Table 7	Universal service required by law
Table 8	Universal service provision in practice
Table 9	Uniform tariffs and affordability
Table 10	Access requirements in law
Table 11	Domestic transit time requirements and practice
Table 12	Cross-border transit time requirements and practice
Table 13	Complaints and redress requirements

### 3 Reserved services

Table 14	Scope of reserved area
Table 15	Reservation of specific services

### 4 Authorisation of competitive postal operators

Table 16	Authorisation of CPOs inside the universal service
Table 17	Number of licensed CPOs inside universal service, 1998-2003
Table 18	Compensation funds
Table 19	Authorisation of CPOs outside the universal service
Table 20	Number of authorised CPOs outside universal service, 1998-2003

## **5 Tariff principles**

Table 21 Services subject to price regulation

Table 22 Special tariffs for correspondence

Table 23 Special tariffs for direct mail

Table 24 Special tariffs for parcels

Table 25 NRA rate cases, 1998-2003

## **6 Transparency of USP accounts**

Table 26 Accounting requirements in law (NRA)

Table 27 USP accounts, compliance with Directive, 2002

Table 28 USP accounts, compliance with Directive, 2003

## **7 National regulatory authorities**

Table 29 National regulatory authorities

Table 30 NRA total and professional staff, 1998-2003

Table 31 NRA budget, 1998-2003

Table 32 NRA: elements of independence

Table 33 NRA: enforcement powers

## **1 Overview of regulatory framework**

**Table 1. Summary of postal laws**

	(1) Date current law	(2) Date 1997 law	(3) Amends since 1997	(4) EN translation	(5) Transpose 1997/67	(6) Transpose 2002/39
AT	22.08.2003	1998	1	N	Y	Y
BE	07.10.2002	1991	2	N	Y	Y
CY	22.03.2002	1960	1	Y	Y	N
CZ	18.01.2000	1946	1	Y	N	N
DE	16.08.2002	1969	3	Y	Y	Y
DK	01.06.2002	1995	1	Y	Y	Y
EE	13.06.2001	1991	1	Y	N	N
ES	01.01.2002	1953	2	N	Y	Y
FI	06.04.2001	1993	1	Y	Y	N
FR	25.06.1999	1990	1	Y	Y	N
GB	11.12.2002	1981	1	Y	Y	Y
GR	26.09.2003		1	N	Y	Y
HU	27.11.2003	1992	2	Y	Y	Y
IE	19.12.2002	1983	2	Y	Y	Y
IT	01.01.2003	1973	2	N	Y	Y
LT	01.05.2004		2		Y	Y
LU	20.12.2002	1992	3	N	Y	Y
LV	16.02.2004	1994	1	Y	Y	Y
MT	24.12.2002	1975	1	Y	Y	N
NL	01.06.2000	1988	1	Y	Y	Y
PL	18.03.2004	1990	2	Y	Y	Y
PT	12.06.2003	1988	3		Y	Y
SE	22.12.1993	1997	1	Y	Y	Y
SI	26.03.2004	1986	3	N	Y	Y
SK	03.12.2003	1950	2	Y	Y	Y
IS			0			
LI	18.12.1998		0	N		
NO	01.01.2003	1996	2	Y	Y	Y
BG	04.08.2000	1975	2	Y	Y	N
RO	01.02.2002	1996	1	Y	Y	Y
TR			0			

Sources: Col 1: 101LW Q2; Col 2: 101LW Q8; Col 4: 101LW Q6; Col 5: 101LW Q4; Col 6: 101LW Q5

#### Notes

1) Col 3, number of amendments, indicates number of acts or major amends for which specific dates are known; what constitutes a "major" amendments is not always clear.

**Table 2. History of postal laws since 1997**

	(1) Law	(2) Name of law	(3) Date	(4) EN trans.
AT	1997 law	Postal Law Regarding Postal Services 1997	1998	Y
	Current	(amendment To) Federal Law Regarding Postal Services 1997	2003	N
BE	1997 law	Act Of 21 March 1991 On The Reform Of Some Economic Public Companies	1991	N
	1st amend	Act Of 21 Mar 1991(public Companies), Amended Royal Decrees Of 1999	1999	
	Current	Act Of 21 Mar 1991(public Companies), Amended Royal Decrees Of 1999, 2002	2002	N
CY	1997 law	Postal Law	1960	Y
	Current	Telecomm. And Postal Regulation Law Of 2002 N(i)19/2002	2002	Y
CZ	1997 law	Act No. 222/1946 Coll. On The Post, As Amended By Act No. 86/1950 Coll. And Act No. 88/1950 Coll.	1946	N
	Current	Act No. 29/2000 Coll. On Postal Services	2000	Y
DE	1997 law	Gesetz Über Das Postwesen - Postal Act	1969	N
	1st amend	Postal Act	1997	
	Current	1997 Postal Act, Amended 16 Aug 2002.	2002	Y
DK	1997 law	Postal Business Act	1995	Y
	Current	Postal Business Act (1995), Amended June 2002	2002	Y
EE	1997 law	Communications Act Of Estonian Republic	1991	N
	Current	Postal Act	2001	Y
ES	1997 law	Postal Services Reorganisation	1953	N
	1st amend	Postal Law 1998	1998	
	Current	Postal Law 1998, Amended 2002	2002	N
FI	1997 law	Act On Postal Services	1993	Y
	Current	Postal Services Act	2001	Y
FR	1997 law	Law 90-568 Dated July 2nd 1990, Modified, Relative To The Organization Of The P&t Public Service	1990	Y
	Current	Law 99.533 (06-25-1999) Of Orientation For Installation & Durable Dvpt Of The Territory	1999	Y
GB	1997 law	Post Office Act 1969 And Postal Services Regulations 1999, Amended 1981	1981	Y
	1st amend	Postal Services Act 2000		
	Current	Postal Services Act 2000, Amended Postal Services (ec Dir) Regs 2002	2002	Y
GR	1997 law	No Law Existing On 1st Jan 1997		N
	1st amend	Organization Of The Sector Of Postal Services Provision And Other Regulations (I 2668/1998)	1998	N
	Current	Law 3185/2003, Amending Law 2668/1998	2003	N

	(1) Law	(2) Name of law	(3) Date	(4) EN trans.
HU	1997 law	Act On The Post	1992	Y
	1st amend	Act On Communications	2001	Y
	Current	Act On The Post	2003	Y
IE	1997 law	Postal And Telecommunications Services Act, 1983	1983	Y
	1st amend	European Communities (postal Services) Regulations, 2000 S.i.310 Of 2000	2000	Y
	Current	European Comm. (postal Services) Reg, 2002S.i.616 Of 20-02	2002	Y
IT	1997 law	Approval Of The Sole Text Of Legislative Disposition In Postal, Bank Postal And Telecommunications	1973	N
	1st amend	Postal Law 1999	1999	
	Current	Postal Law 1999, Amended Leg. Decree 384/2003	2003	N
LT	1st amend	Postal Law Of The Republic Of Lithuania	1999	Y
	2d amend	Law On The Amendment Of The Republic Of Lithuania Postal Lawostal Law Of The Republic Of Lithuania	2001	y
	Current	Postal Law	2004	
LU	1997 law	Law Of 10 August, 1992 Instigating The Entreprise Des Postes Et Télécommunications	1992	N
	1st amend	Loi Modifiée Du 15 Déc. 2000 Sur Les Servs. Posteaux	2000	
	2d amend	Loi Du 20 Décembre 2002 Portant Modification De La Loi Du 15 Décembre 2000 Sur Les Services Postaux	2002	N
	Current	Loi Modifiée Du 15 Déc. 2000 Sur Les Servs. Posteaux, Amended Loi 20 Dec. 2002	2002	N
LV	1997 law	Postal Law	1994	Y
	Current	Postal Law 1994, amended 26.2.2004	2004	Y
MT	1997 law	Post Office Act (cap 254)	1975	Y
	Current	Postal Services Act 2002	2002	Y
NL	1997 law	Postal Act	1988	Y
	Current	Postal Act	2000	Y
PL	1997 law	The Act Of November 23, 1990 On Posts And Telecommunications	1990	
	1st amend	Act Of 12 June 2003 - Postal Law	2003	Y
	Current	Act Of 12 June 2003, Amended 18 Mar. 2004	2004	Y
PT	1997 law	Decree-law 188/81 Of July 2 And Decree-law 176/88 Of May 18 (regulation Of Public Postal Services)	1988	Y
	1st amend	Basic Law For Postal Services (law No. 102/99, Amend 102/99 And 150/2001	2001	
	2d amend	Basic Law For Postal Services (law No. 102/99	1999	Y
	Current	Basic Law For Postal Services 102/99, Amended To Decree Law 116/2003	2003	
SE	1997 law	Postal Services Act (1993:1684, Ammendment 1996:1132)	1997	Y
	1st amend	1998:483		
	2d amend	1999:571		
	Current	Postal Services Act, 1993:1684, Last Amended 2003:708	1993	Y
SI	1997 law	Postal, Telegraphic And Telephonic Services Act	1986	N
	1st amend	Postal Services Act	1997	Y
	2d amend	Postal Services Act	2002	Y
	Current	Amended And Revised Postal Services Act	2004	N



	(1) Law	(2) Name of law	(3) Date	(4) EN trans.
SK	1997 law	Postal Act No 222/1946 Coll	1950	N
	1st amend	Act 507/2001 Coll. On Postal Services	2001	Y
	Current	Act 507/2001 Coll. (6 Nov 2001) Amended 15/2004 Coll. (3 Dec 2003)	2003	Y
LI	Current	Gesetz Über Das Liechtensteinische Postwesen (postgesetz, Pg)	1998	N
NO	1997 law	As Above	1996	Y
	Current	Act No. 73 Of 1996 (postal Services Act), Last Amended No 51 (june 2003)	2003	Y
BG	1997 law	Communications Act - Last Amendment Since 11.08.1998	1975	N
	Current	Postal Services Act, Last Amendment Effective Since 1.01.2003	2000	Y
RO	1997 law	Law No. 83/1996 On Postal Services	1996	N
	Current	Government Ordinance No.31/2002 On Postal Services, Amended 642/2002	2002	Y

Sources: 101LW generally.

**Notes**

**Table 3. Postal regulations in force**

		(1) Name	(2) Date	(3) Authority issuing	(4) Scope	(5) EN trans.
AT	1	Ordinance On The Postal Universal Service	01.03.2002	MinPost	ABIL	Y
	2	Briefachanlagenverordnung	14.02.2004	MinPost	L	N
	3	Cost Accounting Ordinance	01.03.2000	MinPost	G	N
BE	1	Royal Degree Transposing The Obligation Resulting From Directive 97/67/ec	09.06.1999	Council	ABCDEFGHJIJ	N
	2	Royal Degree Transposing The Obligations Resulting From The Directive 02/39/ec	07.10.2002	Council	CH	N
	3	The Management Contract Between The State And De Post	28.06.2002	Council	BHIL	N
	4	See Explanatory Notes		Council	L	N
CY	1	The Quality Of Postal Services Regulations Of 2003	18.07.2003	NRA	BI	Y
	2	Accounting Systems, Cost Regulation Of The Usp, Compensation Fund	18.07.2003	NRA	FG	Y
	3	Regulation Of General Authorizations And Individual Licenses (postal Services) Regulations Of 2003	18.07.2003	NRA	DE	Y
	4	Licenses Of Administrative Charges (postal Services) Regulation Of 2003	18.07.2003	NRA	L	Y
CZ	1	Decree No. 28/2001 Coll., On Basic Services Of Postal Licence Holder	10.01.2001	MinPost	ABIJ	Y
	2	Government Order No. 112/2000 Coll., On Price Limit	03.04.2000	Council	C	Y
	3	Government Order No. 305/2003 Coll., On The Scope Of Postal Authorisation	03.09.2003	Council	C	Y
	4	Decree No.226/2000 Coll., On Financial Ability For Postal Services Providing	26.07.2000	Other	L	N
DE	1	Pudlv - Postal Universal Service Ordinance	12.12.1999	Other	ABEI	N
	2	Pdlv-Postal Services Ordinance	25.08.2001	Other	JL	N
	3	Pentgv-Postal Rates Regulation Ordinance	11.11.1999	Other	GH	N
	4	Pdsv-Postal Services Data Protection Ordinance	02.07.2002	Other	L	N
	5	Plgebv-Postal Licence Fee Ordinance	02.02.2002	MinPost	L	N
DK	1	Executive Order On The Concession Granted To Post Denmark	23.02.1995	MinPost	ACHIL	Y
	2	Executive Order Om Post Denmark's Universal Service Obligation And Sole Right, Evt.	22.02.1995	MinPost	ACJL	Y
	3	Executive Order Stipulating That Postal Operators Shall Register/report Their Business To The Nra	16.06.1995	MinPost	DEL	N
	4	Executive Order On Postal Distribution Af Newspapers And Magazines At Subsidised Rates	08.02.1995	MinPost	L	Y
	5	Executive Order On Transferring Tasks And Authority To The Nra	03.04.1995	MinPost	KL	N
EE	1	The Procedure For Registration,use,and Destruction Of Postal Service Provider's Identification Stamp	13.11.2001	MinPost	L	Y
	2	Separation Of Revenue Accounting And Cost Accounting Associated With Services Included In Ups Set	05.11.2001	MinPost	G	Y
	3	Items Not Allowed For Delivery By Post	12.11.2001	MinPost	L	Y

		(1) Name	(2) Date	(3) Authority issuing	(4) Scope	(5) EN trans.
EE	4	Estab.of The Forms Of Ps Provider Licence,licence Application,licence Extension,notice Of Commenceme	12.11.2001	MinPost	L	Y
	5	Establishment Of State Register Of Postal Service Providers And Statutes Of Maintaining The Register	11.12.2001	Other	L	Y
	6	Requirements For The Ups And The Provision,for The Siting Of Acces Points Of The Postal Network	19.12.2001	Other	I	Y
ES	1	1829/1999 - Postal Services General Regulation, Spu And Liberalisation	03.12.1999	Council	ABI	N
	2	89/99 - On Authorisation And Licences	22.01.1999	Council	DE	N
	3	1338/1999 - Postal Fees And Compensation Fund For Spu	31.07.1998	Council	F	N
	4	444/2001- Creation Of Spanish Nra	27.04.2001	Council	K	N
	5	1232/2003 - Regulation Of The Postal Advisory Council	26.09.2003	Council	K	N
	6	Designating Authority Body In Charge Of Spu Fund	20.12.1999	MinPost	F	N
FI	1	None				
FR	1	Decree N°90-1214 Of 29-12-1990, Modified,relative To The Specification Of La Poste & To The P&t Code	29.12.1990	PM	ABGHIJ	Y
GB	1	Postal Services (ec Directive) Regulations 2002	01.01.2003	Parl	C	Y
GR	1	Regulation Of General Authorisations For The Provision Of Postal Services Official Gazette 1682/b/03	14.11.2003	NRA	DEJ	N
	2	Regulation Of Individual Licences For The Provision Of Postal Services (official Gazette 1906/b/03)	22.12.2003	NRA	BGHJ	N
	3	Determination Of The Quality Specifications And Terms Of Provision Of The Universal Postal Service	29.12.2000	MinPost	BI	N
	4	Regulation On Objective Costing Procedures For The Usp (official Gazette 1993/b/03)	31.12.2003	NRA	G	N
	5	Determination Of Cases In Which A Lump-sum Compensation Is Imposed For	02.06.2000	MinPost	J	N
	6	Determination Of The Type And Procedure Of Investigations Or Other Auditing Acts To Which Eett	02.06.2000	MinPost	JK	N
HU	1	The Provision Of Postal Services	18.12.2001	Council	BIJL	N
	2	Special Conditions Of Data Processing Performed By Communications Service Providers, ...	18.12.2001	Council	L	N
	3	The Task And Competence Of The Informatics And Communications Minister	28.06.2002	Council	L	Y
	4	The Detailed Rules Of Accounts Separation To Be Performed By Postal Service Providers	22.12.2001	MinPost	G	N
	5	Maximum Officially Set Tariffs Of Domestic Reserved Postal Services	03.03.2004	MinPost	H	N
	6	Detailed Rules Of The Provision Of Telegraph Services	18.12.2001	Council	L	N
IE	1	Direction On Accounting Separation & Costing MethodologyOdr Doc 01/74	20.09.2001	NRA	G	Y
	2	Quality Of Service Standards For An Post Setting An Interim Target For 2004 Comreg Doc 03/150	22.12.2003	NRA	I	Y
	3	Guidelines For Compliants And Dispute Resolution Under Regulation 15(1) Of Si616/2002	21.05.2003	NRA	J	Y
	4	Direction On The Density Of Access Points And The Quality Of The Universal Postal Service To Be Prov	21.05.2003	NRA	B	Y
	5	Determination Dated 21 May 2003 Issued Under Regulation 6(2) Of Si616/2002	21.03.2003	NRA	L	
	6	Authorisation Procedures Under Regulation 7 Of Si616/2002 See Comreg Doc 03/139r	30.11.2003	NRA	DE	Y

		(1) Name	(2) Date	(3) Authority issuing	(4) Scope	(5) EN trans.
IT	1	Regulament Concerning Dispositions For Issuing Individual Licences In The Postal Sector	04.02.2000	MinPost	E	N
	2	Regulament Concerning Dispositions On General Authorizations In Postal Sector	04.02.2000	MinPost	D	N
	3	Modality Of Functioning Of The Compensation Fund For The Universal Service	17.11.2000	Other	F	N
	4	Scope Of The Reserved Area For Maintenance Of The Universal Service	18.12.2002	NRA	C	N
	5	New Tariffs Of Reserved Postal Services And New Prices Of Universal Postal Services Concerning The	23.12.2003	NRA	H	N
	6	Quality Standard For The Time Transit Of Ordinary Mail, Priority Mail, Registered Mail And Parcels	19.06.2003	NRA	I	N
LT	1	Order Of The Minister Of Transp. And Comm.On The Approval Of The Universal Postal Services Tariffs	08.11.1999	MinPost	H	N
	3	See Notes	12.08.2002	MinPost	DE	Y
	4	See Notes	29.09.2003	NRA	JK	Y
	5	See Notes	31.03.2003	NRA	G	Y
	6	See Notes	31.03.2003	NRA	BIL	Y
	LU	1	Règlement Grand-ducal Du 10.03. 2001 Fixant La Durée D'acheminement Des Envois Postaux	10.03.2001	MinPost	I
LV	1	Postal Regulations	29.08.1995	Council	BI	N
	2	Regulations On Tariffs Of Postal Services	16.05.1995	Council	H	N
MT	1	Inland Post Regulations	28.10.1985	MinPost	BHJL	Y
	2	Overseas Post Regulations	25.05.1989	MinPost	BHJL	Y
NL	1	Postbesluit	01.06.2000	MinPost	A	Y
	2	Besluit Algemene Richtlijnen Post	01.06.2000	MinPost	BGHIJ	Y
PL	1	The Ordinance Of The Minister Of Infrastructure Dated January 9, 2004 On The Conditions For ...	09.01.2004	MinPost	BI	Y
	2	The Ordinance Of The Minister Of Infrastructure Dated October 13, 2003 On Complaints Concerning ...	13.10.2003	MinPost	J	Y
	3	The Ordinance Of The Minister Of Finance Dated December 24, 2003 On The Method For Cost Allocation..	24.12.2003	MinOther	G	Y
	4	The Ordinance Of The Minister Of Infrastructure Dated September 24, 2003 On Mail Boxes	24.09.2003	MinPost	B	Y
	5	The Ordinance Of The Minister Of Infrastructure Dated September 24, 2003 On Letter Boxes	24.09.2003	MinPost	B	Y
PT	1	Please See Explanatory Notes.	04.11.1999	Other	ABCFGHIJK	Y
	2	Access And Exercise Regime For The Activity Of Provision Of Postal Services In A Competitive Market	07.05.2001	Council	DEJK	Y
SE	1	Postal Services Ordinance (1993:1709, Amendments: 1996:1135; 1998:529)	01.01.1994	Parl	ABHI	Y
	2	Usp License Conditions	01.07.2001	NRA	ABGHIJ	N
SI	1	Rules On The Quality And Method Of Providing Universal Postal Services	29.08.2003	MinPost	BI	Y
	2	Rules On The Method Of Calculation And Payment Of The Charges For Provision Of Postal Services	30.12.2003	MinPost	K	N
	3	Use Explanatory Note	27.09.2003	MinPost	L	N

		(1) Name	(2) Date	(3) Authority issuing	(4) Scope	(5) EN trans.
SI	4	Rules On The Content Of The General Terms And Conditions For The Provision Of Postal Services	26.09.2003	MinPost	L	N
	5	Rules On Issuing The Postal Stationery□	12.10.2002	MinPost	L	N
SK	1	General Authorisation For Providing Postal Services	15.05.2002	NRA	DE	Y
	2	Postal License	27.12.2002	NRA	ABGHIJ	Y
	3	General Authorisation For Providing Postal Services Amending The Ga From May 15 2001	05.03.2004	NRA	DE	N
IS						
LI	1	Verordnung Zum Gesetz Über Das Liechtensteinische Postwesen (postverordnung, Pv)	14.12.1999	MinPost	ABFGH	N
	2	Gesetz Schutze Der Postwertzeichen	23.05.1969	Parl	L	N
	3	Gesetz Über Die Errichtung Und Die Organisation Der Liechtensteinischen Post (pog)	18.12.1998	Parl	L	N
NO	1	Regulations Of 1 July 1997 Relating To The Provision Of Universal Postal Services	01.07.1997	MinPost	ABCDE	N
	3	Licence Granted To Norway Post	26.09.2001	MinPost	ABCGHIJ	Y
BG	1	Ordinance No Rd- 08-997 Of The Minister Of Transport And Commun For Standard Quality Levels For Usp	27.12.2000	MinPost	I	N
	2	Ordinance No 287 Of 28.12.2000 For On Specification Of The Rules For The Formation Of Usp Prices	28.12.2000	Council	H	N
	3	Ordinance No 6 Of 20.11.2003 On The Requirements For Postal	02.12.2003	Council	L	Y
	4	Draft Of Methods For Determination Of The Affordability Of The Universal Postal Service Price		Council	GH	Y
	5	Draft Of Methods Of Proving The Deficit Of The Ups Provision Under Economically Unprofit		Council	GH	Y
	6	Standards For Determining The Density Of The Access Points To The Postal Network Intended To Provide	26.06.2003	NRA	B	Y
RO	1	Anrc President Decision No. 118/2003 On The Procedure For Authorization On Postal Services Providers	01.04.2003	NRA	DEK	Y
	2	Anrc President Decision No. 1351/2003 An Usp Conditions And Designation Procedure	12.12.2003	NRA	ABCFGHIK	Y

TR

Sources: 102RG generally.

Column 3: NRA = National regulatory authority; MinPost = Minister responsible for postal sector; MinOther = Minister other than the minister responsible for post; Ombud = Public ombudsman; PM = Prime Minister; Council = Council of Ministers; Parl = Parliament; Court = Courts of law; None = Authority not clearly defined; Other = (see Notes below).

Column 4: A = Definition of universal service; B = Access conditions to universal service; C = Scope of reserved area; D = Authorisation for postal operators outside univ. serv.; E = Authorisation for postal operators within univ. serv.; F = Universal service fund; G = Accounting rules for the USP; H = Price regulations; I = USP quality of service targets or monitoring; J = User complaints and redress; K = Organization and proceedings of NRA; L = Other issues - use Explanatory Notes.

**Notes**

**Table 4. Ministries responsible for postal sector**

	(1) Ministry
AT	Ministry for Transport, Innovation and Technology
BE	Ministry of Economic Affairs
CY	Ministry of Communications and Works
CZ	Ministry of Informatics
DE	Federal Ministry of Economics and Labour
DK	Ministry of Transport
EE	Ministry of Economic Affairs and Communications
ES	
FI	Ministry of Transport and Communications
FR	Patrick Devedjian
GB	
GR	Ministry of Transport and Communications
HU	Informatics and Communication Ministry
IE	Department of Communications, Marine and Natural Resources
IT	Ministry of Communications
LT	Ministry of Transport and Communications
LU	Ministry of Economics
LV	Ministry of Transport of the Republic of Latvia
MT	
NL	Ministry of Economic Affairs
PL	Ministry of Infrastructure
PT	Ministry of Economy
SE	Ministry of Industry, Employment and Communications
SI	Ministry of Information Society
SK	Ministry of Transport, Posts and Telecommunications
IS	
LI	
NO	Ministry of Transport and Communications
BG	Ministry of Transport and Communications
RO	Ministry of Communication and Information Technology
TR	

Sources: Col 1: 211RF Q1

**Notes**

**Table 5. Responsibility for policymaking functions under the Directive**

	(1) Specifics of USO	(2) Weight limit for USO	(3) Scope of reserved area	(4) Auth. sys. non- univ. servs	(5) Auth. sys. univ. servs.	(6) QoS standards
AT	MinPost	MinPost	MinPost	[None]	[None]	MinPost
BE	Parl	Parl	Parl	Parl	Parl	Parl
CY	NRA	NRA	NRA	NRA	NRA	NRA
CZ	NRA	NRA	Council	Parl	NRA	NRA
DE	Parl	Parl	Parl	Parl	Parl	Parl
DK	MinPost	MinPost	MinPost	MinPost	MinPost	MinPost
EE	Parl	Parl	[None]	Parl	Parl	Council
ES	Council	Parl	Council	NRA	Parl	Council
FI	Parl	Parl	[None]	[None]	Parl	Parl
FR	Parl	Parl	Parl	[None]	[None]	MinPost
GB	Parl	NRA	NRA	NRA	NRA	NRA
GR	MinPost	Parl	Parl	Parl	Parl	MinPost
HU	Council	Parl	Parl	Parl	Parl	Council
IE	MinPost	MinPost	MinPost	MinPost	MinPost	NRA
IT	MinPost	MinPost	MinPost	MinPost	MinPost	MinPost
LT	Parl	Parl	Parl	Parl	Parl	NRA
LU	MinOther	MinOther	MinOther	MinOther	MinOther	MinOther
LV	Council	Parl	Parl	Parl	Parl	Council
MT	NRA	Parl	MinPost	Parl	Parl	NRA
NL	MinPost	MinPost	MinPost	[None]	[None]	MinPost
PL	MinPost	MinPost	MinPost	MinPost	MinPost	MinPost
PT	Parl	Parl	Council	Council	Council	NRA
SE	Parl	Parl	[None]	[None]	Parl	Council
SI	MinPost	Parl	Parl	Parl	[None]	NRA2
SK	Parl	NRA	Parl	Parl	Parl	NRA
IS						
LI						
NO	MinPost	MinPost	MinPost	MinPost	Other	MinPost
BG	NRA	Parl	MinPost	MinPost	MinPost	NRA
RO	NRA	NRA	NRA	NRA	NRA	NRA
TR						

Sources: Col 1: 211RF Q18; Col 2: 211RF Q19; Col 3: 211RF Q21; Col 4: 211RF Q22; Col 5: 211RF Q24; Col 6: 211RF Q30

All columns: NRA = National regulatory authority; MinPost = Minister responsible for postal sector; MinOther = Minister other than the minister responsible for post; Ombud = Public ombudsman; PM = Prime Minister; Council = Council of Ministers; Parl = Parliament; Court = Courts of law; None = Authority not clearly defined; Other = (see Notes below).

#### Notes

**Table 6. Responsibility for administrative functions under the Directive**

	(1) Cost-based tariffs	(2) Special tariffs	(3) QoS monitoring	(4) USP accounts	(5) Cross subsidy	(6) Procedures for gen.	(7) Procedures for licence	(8) Procedures for complaint
AT	MinPost	MinPost	MinPost	MinPost	MinPost	[None]	[None]	MinPost
BE	NRA	NRA	NRA	NRA	NRA	MinPost	Council	NRA
CY	NRA	NRA	NRA	NRA	NRA	NRA	NRA	NRA
CZ	MinPost	MinPost	NRA	NRA	NRA	Parl	NRA	NRA
DE	NRA	NRA	NRA	NRA	NRA	NRA	NRA	NRA
DK	MinPost	MinPost	NRA	MinPost	MinPost	MinPost	MinPost	NRA
EE	NRA	NRA	NRA	NRA	NRA	Parl	Parl	NRA
ES	Council	Council	Council	MinPost	MinPost	Council	MinPost	NRA
FI	NRA	NRA	NRA	NRA	NRA2	[None]	Council	NRA
FR	MinPost	MinPost	MinPost	MinPost	MinPost	[None]	[None]	NRA2
GB	NRA	NRA	NRA2	NRA	NRA	NRA	NRA	NRA
GR	NRA	NRA	NRA	NRA	NRA	NRA	NRA	NRA
HU	Parl	Parl	Parl	Parl	Parl	Parl	Parl	Parl
IE	NRA	NRA	NRA	NRA	NRA	NRA	NRA	NRA
IT	MinPost	MinPost	MinPost	MinPost	MinPost	MinPost	MinPost	MinPost
LT	NRA	Parl	NRA	NRA	NRA	NRA	NRA	NRA
LU	NRA	NRA	NRA	NRA	NRA	MinOther	MinOther	NRA
LV	Parl	Parl	Parl	Parl	Parl	NRA	Council	Parl
MT	NRA	NRA	NRA	NRA	NRA	Parl	Parl	NRA
NL	MinPost	MinPost	NRA	NRA	MinPost	[None]	[None]	MinPost
PL	NRA	NRA	NRA	NRA	NRA	MinPost	MinPost	MinPost
PT	NRA	NRA	NRA	NRA	NRA	Council	Council	NRA
SE	NRA	NRA	NRA	NRA	NRA	[None]	Parl	NRA
SI	NRA	NRA	NRA	NRA	NRA	NRA	[None]	NRA
SK	NRA	NRA	NRA	NRA	NRA	NRA	NRA	NRA
IS								
LI								
NO	NRA	NRA	NRA	MinPost	MinPost	Other	MinPost	NRA
BG	NRA	NRA	NRA	MinPost	NRA	MinPost	MinPost	NRA
RO	NRA	NRA	NRA	NRA	NRA	NRA	NRA	NRA
TR								

Sources: Col 1: 211RF Q26; Col 2: 211RF Q27; Col 3: 211RF Q31; Col 4: 211RF Q29; Col 5: 211RF Q28; Col 6: 211RF Q23; Col 7: 211RF Q25; Col 8: 211RF Q32

All columns: NRA = National regulatory authority; MinPost = Minister responsible for postal sector; MinOther = Minister other than the minister responsible for post; Ombud = Public ombudsman; PM = Prime Minister; Council = Council of Ministers; Parl = Parliament; Court = Courts of law; None = Authority not clearly defined; Other = (see Notes below).

#### Notes



## **2 Universal service**

**Table 7. Universal service required by law**

	(1) Parcels wt limit domestic	(2) Parcels wt limit cross border	(3) Additional services included
AT	20	20	ABCDEF
BE	10	20	ABCDE
CY	20	20	ABCDE
CZ	15	20	BCDEF
DE	20	20	ABCDEF
DK	20	20	ABCDE
EE	10	20	BCDE
ES	10	10	BC
FI	10	30	BCDE
FR	20	20	ABCDEF
GB	20	20	ABCDE
GR	20	20	BCDEF
HU	20	20	ABCDEF
IE	20	20	ABDE
IT	20	20	ABCDEF
LT	10	10	BCDE
LU	10	20	BC
LV	10	10	BCDE
MT	10	10	ABCDE
NL	10	20	BCDE
PL	10	20	ABCEF
PT	20	20	BCDE
SE	20	20	ABCDE
SI	20	20	BCDEF
SK	10	20	ABCDEF
IS			
LI			
NO	20	20	ABCDF
BG	10	10	ABCE
RO	10	20	BCDEF
TR			

Sources: Col 1: 212US Q1; Col 2: 212US Q2; Col 3: 212US Q3

Columns 1 and 2: 10 = 10 kg; 15 = 15 kg; 20 = 20 kg; Other = (see Notes below).

Column 3: A = Bulk direct mail; B = Registered letter service; C = Insured letter service; D = Registered parcel service; E = Insured parcel service; F = (see Notes below).

#### Notes

CZ: Money orders;

PL: Money orders;

NO: Forwarding of postal items to a temporary address, forwarding to a new address (at least one year), return of postal items to the sender in case of failed delivery, storage of postal items up to three months on behalf of the addressee.

**Table 8. Universal service provision in practice**

	(1) Deliveries/ week required	(2) Del./week in practice	(3) Exceptions admissible	(4) Exceptions applied	(5) Share of population	(6) Home delivery for parcels	(7) Services for blind people
AT	5	5	N	N		Yes	YesFree
BE	5	5	N	N		Yes	YesFree
CY	5	5	N	N		Charge	YesFree
CZ	5		N			Yes	
DE	6	6	N	N		Yes	YesFree
DK	6	6	Y	N	0.01%	Yes	YesFree
EE	5	6	Y	Y	0.01%	Charge	YesFree
ES	5	6	Y	Y		No	YesFree
FI	5	5	Y	Y	0.01%	Charge	YesSameRate
FR	6	6	N	N		Yes	YesFree
GB	6	6	Y	Y		ChargeX	YesFree
GR	5	5	Y	Y	7.00%	Charge	YesFree
HU	5	5	N	N		Yes	YesFree
IE	5	5	Y	N	0.02%	Yes	YesFree
IT	5	6	N	N		Yes	YesFree
LT	5	5	N	N		Charge	YesFree
LU	5	5	N	N		Yes	YesFree
LV	5	5	N	N		Charge	YesFree
MT	5	6	N	N		Yes	YesFree
NL	6	6	N	N		Yes	YesFree
PL	5	5	N	N		Yes	YesFree
PT	5	5	N	N		Charge	YesFree
SE	5		Y		0.03%	Charge	
SI	5	6	Y	Y	1.00%	Yes	YesFree
SK	5	5	Y	N		Yes	YesFree
IS		5		Y			YesFree
LI							
NO	6	6	Y	Y	0.05%	Charge	YesFree
BG	5		Y			ChargeX	
RO	5	5	Y	Y	2.00%		YesFree
TR							

Sources: Col 1: 212US Q7; Col 2: 231CD Q1; Col 3: 212US Q8; Col 4: 231CD Q2; Col 5: 212US Q9; Col 6: 212US Q4; Col 7: 231CD Q13

Column 6: Yes = Universal home delivery without charge; Charge = Delivery to postal outlet; home delivery at extra charge; ChargeX = Standard home delivery, but extra charge at some places; No = Parcel delivery unavailable in some places.

Column 7: No = No; YesFree = Yes, for free; YesSameRate = Yes, at same rate as standard service; YesHigherRat = Yes, at extra rate.

#### Notes

Columns (2), (4) and (7): answers of USPs

LT: In urban regions mail is delivered six times a week.

**Table 9. Uniform tariffs and affordability**

	(1) Uniform tariffs required	(2) Letters - applied	(3) Parcels - applied	(4) Affordability defined	(5) Affordability measured	(6) Exempted from VAT	(7) VAT rate applied
AT	US	Y	Y	N	N	Reserved	20%
BE	US	Y	Y	N	N	USP	21%
CY	US	Y	Y	N	N	USP	
CZ	US			N	N	USP	
DE	Res	Y	Y	Y	Y	US	16%
DK	US	Y	Y	N	N	US	25%
EE	US	N	Y	N	N	US	18%
ES		Y	Y	N	N	USP	16%
FI	Other	Y	Y	N	N	None	22%
FR	Res	Y	Y	N	N	US	20%
GB	US	Y	Y	N	N	USP	
GR	US	Y	Y	N	N	US	18%
HU	No	Y	Y	N	N	USP	
IE	No	Y	Y	N	Y	US	21%
IT	US	Y	Y	Y	N	USP	20%
LT	US	Y	Y	N	N	LP	18%
LU	US	Y	Y	N	N	USP	15%
LV	US	Y	Y	N	N	Reserved	18%
MT	No	Y	Y	N	N	US	18%
NL	US	Y	Y	N	N	US	20%
PL	US	Y	Y	N		USP	22%
PT	US	Y	N	Y	Y	USP	
SE	US			N	N	None	25%
SI	US	Y	Y	N	N	None	20%
SK	No	Y	Y	N	Y	US	19%
IS		Y	N				
LI							
NO	Other	Y	Y	N	N	None	24%
BG	US			Y	Y	Other	20%
RO	LP	Y	Y	N	Y	None	19%
TR							

Sources: Col 1: 212US Q12; Col 3: 234PP Q2; Col 4: 212US Q13; Col 5: 212US Q15; Col 6: 212US Q5; Col 7: 212US Q6

Column 1: No = Uniform tariffs not mandatory; US = Mandatory for all universal services incl. parcels; LP = Mandatory for letter post but not for parcels; Res = Mandatory for reserved services; Other = Other requirements - use Explanatory Notes.

Column 2 refers to uniform tariffs applied for single piece correspondence in the lowest weight step sent by the fastest standard category. [USP answer]

Column 3 refers to uniform tariffs applied for single piece parcels. [USP answer]

Columns 4 and 5 refers to affordability of universal service tariffs.

Column 6: None = No VAT exemption; Reserved = Reserved services exempted; US = Universal services exempted; USP = All services of USP exempted; Other = (see Notes below).

#### Notes

FI: Uniform tariffs are required for first class letters.

BG: Stamped postal items are exempted from VAT.

**Table 10. Access requirements in law**

	(1) Standards postal outlets	(2) USP meets standard?	(3) Restriction of agencies	(4) Standards collection boxes	(5) USP meets standard?	(6) Monitored by
AT	A	Y	Y	C	Y	MinPost
BE	E	Y	Y	B	Y	NRA
CY	A		N	D	Y	NRA
CZ	C	Y	N	CD	Y	NRA
DE	BCD	Y	Y	C	Y	NRA
DK	AE	Y	N	A		Other
EE	CD	Y	N	CD	Y	NRA
ES						
FI	E	Y	N	AE	Y	NRA
FR	A		N	A		MinPost
GB	CD	Y	N	CD	Y	NRA
GR	A		N	D		NRA
HU	CD	Y	N	CD	Y	NRA
IE	C	Y	N	CD	Y	NRA
IT	A		N	A		NRA
LT	B	Y	N	AB	Y	NRA
LU	A		N	A		NRA
LV	BD	Y	N	BD	N	NRA
MT	A		Y	A		NRA
NL	BCD	Y	N	CD	Y	NRA
PL	DE	Y	N	A		NRA
PT	A		Y	A		NRA
SE	A	Y	N	A	Y	NRA
SI	D	Y	N	DE	Y	NRA
SK	CD	Y	N	CD	Y	NRA
IS						
LI						
NO	AE	Y	N	E	Y	NRA
BG	D	Y	Y	D	Y	NRA
RO	E	N	N	D	N	NRA
TR						

Sources: Col 1: 213AC Q1; Col 2: 213AC Q2; Col 3: 213AC Q3; Col 4: 213AC Q5; Col 5: 213AC Q6; Col 6: 213AC Q7

Columns 1 and 4: A = No specific minimum standard defined; B = Minimum total number of postal outlets; C = Maximum distance to inhabitants (of populated areas); D = Outlet required in municipalities exceeding certain populat.; E = (see Notes below).

Column 6: NRA = National regulatory authority; MinPost = Minister responsible for postal sector; MinOther = Minister other than the minister responsible for post; Ombud = Public ombudsman; None = Authority not clearly defined; Other = (see Notes below).

#### Notes

BE: (1) At least one post office per community.

DK: (1) Specific minimum standards have not been defined. But there are rules which determinate when a post office can be closed or substituted by a postal agency (based on number of transactions)

FI: (1) At least one post office per community.

(4) Collection letter boxes shall be located within a reasonable distance to the residentials.

PL: (1) In rural regions there shall be one postal office per 65 skm.  
(2) Collection letter boxes shall be accessible for wheel-chaired persons.

SI: (4) The USP can remove a collection letter box if less than 20 letters are dropped per day.

NO: (1), (4) At least one post office/collection letter box per community.

**Table 11. Domestic transit time requirements and practice**

	(1) Targets set	(2) Regularly measured	(3) Measured by	(4) Method audited?	(5) Last audit	(6) EN 13850 applied	(7) If not, when expected?	(8) Penalties
AT	ABCD	ABCD	C	Y	2004	Y		None
BE	ADE	ABDE	C	Y	2002	Y		
CY	AD	AD	C	N	never	N	2005	Fine
CZ	ACE	ACDE	AC	Y	before01	N	2005	Fine
DE	ACD	AD	BC	N	2003	N	2004	Fine
DK	ABCDE	ABCDE	C	N	never	N	2005	None
EE	A	A	A	N	never	N	2004	Fine
ES	ACD	ACD	B	N		Y		Comp
FI	ADE	AD	C	Y	2003	Y		None
FR	ACD	ABCDE	C	Y	2001	Y		Fine
GB								
GR	AD	AD	C	Y	2003		2005	Fine
HU	ABCD	ABCD	AB	Y	2003	N	2004	Fine
IE	AD	A	C	N		Y		
IT	ABCE	AB	C	Y	2003	N	2005	Fine
LT	AC	A	A	N	2003	N	Later	Comp
LU	AD	AD	C	Y	2003	Y		None
LV	A	A	A	N	never	Y		None
MT	D	AD	A	Y	never	N	2005	Other
NL	A	A	C	Y	2003	Y		Fine
PL	ABD	ABCD	B	Y	2003	Y		None
PT	ABCDE	ABCDE	C	Y	2003			Tariff
SE	A	A	C	N	2003	Y		Fine
SI	AC	AC	A	N	never	N	2005	Fine
SK	ABCE	ABE	C	Y	2003	N	2004	Fine
IS								
LI								
NO	ABCD	ABCD	C	N		Y		Fine
BG	A	A	A	N	never	N		None
RO	AD	E	A	N	never	N	2005	Fine
TR								

Sources: Col 1: 218QS Q1; Col 2: 218QS Q2; Col 3: 218QS Q3; Col 4: 218QS Q4; Col 5: 218QS Q5; Col 6: 218QS Q6; Col 7: 218QS Q7; Col 8: 218QS Q8

Columns 1 and 2: A = Domestic priority mail; B = Domestic non-priority mail; C = Domestic parcels; D = Cross border priority mail; E = (see Notes below).

Column 3: A = USP; B = NRA; C = Independent institution; D = IPC - UNEX; E = IPC - UNEX lite; F = (see Notes below).

Column 5: 2004 = 2004; 2003 = 2003; 2002 = 2002; 2001 = 2001; before01 = before 2001; never = Never so far.

Column 7: 2004 = 2004; 2005 = 2005; 2006 = 2006; Later = later than 2006.

Column 8: None = No penalty; Fine = General fine; Comp = Individual compensation; Tariff = Tariffs effected; Other = (see Notes below).

#### Notes

BE: (1), (2) plus newspapers;

CZ: (1), (2) Only insured parcels;

DK: (1), (2) plus newspapers and magazines;

IT: (1), (2) plus registered items;

MT: (8) The NRA has the right to implement penalties in regulation;

PT: (1), (2) plus newspapers and magazines;

SK: (1), (2) first and second class domestic parcels.



**Table 12. Cross-border transit time requirements and practice**

	(1) Directive target in force	(2) Planned implementation	(3) Regularly measured?	(4) Measured by	(5) Penalty
BG					None
CY	Y		Y	IPC	Fine
CZ	N	2005		IPC	None
DE	Y		Y	IPC	REIMS
DK	Y		Y	IPC	None
EE	N	Later		IND	Fine
ES	Y		Y	IPC	REIMS
FI	Y		Y	IPC	REIMS
FR	Y		Y	IPC	REIMS
GB					
GR	Y		Y	IPC	REIMS
HU	Y		Y	IPC	
IE	Y		N	IPC	REIMS
IS					
IT	Y		N		
LI					
LT	N	2004		IPC	None
LU	Y		Y	IPC	REIMS
LV	N	2004	Y	USP	None
MT	N	2004	Y	USP	Other
NL	Y		Y	IPC	Contract
NO	Y		Y	IND	REIMS
PL	Y		Y		None
PT	Y		Y	IPC	REIMS
SK	N	2005	Y	USP	None
TR					
RO	N	2006	N	IPC	
SE	Y		Y	IPC	REIMS
SI	Y		Y	IPC	None
AT	Y		Y	IND	REIMS
BE	N	2004	Y	IPC	REIMS

Sources: Col 1: 218QS Q9; Col 2: 218QS Q10; Col 3: 218QS Q11; Col 4: 218QS Q12; Col 5: 218QS Q16

Column 2: 2004 = 2004; 2005 = 2005; 2006 = 2006; Later = later than 2006.

Column 4: IPC = IPC; NRA = NRA; USP = USP; IND = Independent institution; Other = (see Notes below).

Column 5: None = No penalty; REIMS = Reduced terminal dues according REIMS II; Contract = Reduced terminal dues according to individual contract; Other = (see Notes below).

#### Notes

CZ: (4) plus USP and UPU;

MT: (5) The NRA has the right to implement penalties in regulation;

PT: (5) plus tariffs;

NO: (5) plus a general fine.

**Table 13. Complaints and redress requirements**

	(1) Procedures required	(2) Office of USP	(3) Mediation	(4) Publication required?	(5) Actually published?	(6) Application of EN 14012	(7) Applied to competitors?	(8) Responsible institution
AT	Y	Y	Postbüro	N	N	2004	N	
BE	Y	Y	Ombud	Y	Y	2004	Y	
CY	Y	Y	NRA, Ombu	Y	N	2006orLat	Y	NRA
CZ	Y	Y	NRA	Y	N	2006	N	
DE	Y	Y	NRA	N	Y		N	
DK	Y	N	NRA	Y	Y	Already	N	
EE	Y	Y	NRA	N	Y	2004	Y	NRA
ES	Y	Y	NRA	Y	Y		Y	NRA
FI	Y	Y	NRA	Y	Y	Already	N	Ombud
FR	Y	Y	Ombud	N	Y	2006	N	
GB	Y	Y	Postwatch	Y	Y		Y	
GR	Y	Y	NRA	N	Y		Y	NRA
HU	Y	Y	NRA	Y	Y	2006	Y	NRA
IE	Y	Y	Ombud	Y	N	2005	Y	Other
IT	Y	Y	Conciliation	Y	N	2006orLat	Y	
LT	Y	N	NRA	N	Y	2006orLat	N	
LU	Y	Y	NRA	Y	N	2006orLat	Y	NRA
LV	Y	Y	NRA	Y	Y	2005	Y	NRA
MT	Y	Y	NRA	Y	N	2006	Y	NRA
NL	Y	Y	Ombud, cour	Y	Y	Unknown	N	
PL	Y	Y	Court	Y	N	2006orLat	N	
PT	Y	Y	NRA	Y	Y	2006	Y	NRA
SE	Y	Y	National Boa	Y	Y	Already	Y	NRA
SI	Y	N	NRA	Y	N	2005	N	
SK	Y	Y	NRA	Y	Y	2005	Y	NRA
IS								
LI								
NO	Y	Y	NRA	Y	Y	Already	N	
BG	Y	Y	Court	N	N	2006orLat		
RO	Y	N	NRA	Y	Y	2006	Y	NRA
TR								

Sources: Col 1: 219CR Q1; Col 2: 219CR Q4; Col 3: 219CR Q6; Col 4: 219CR Q7; Col 5: 219CR Q8; Col 6: 219CR Q12; Col 7: 219CR Q13; Col 8: 219CR Q14

Columns 3 and 8: NRA = NRA; Ombud = Ombudsman; Other = (see Notes below).

Column 6: Already = Already implemented; 2004 = 2004; 2005 = 2005; 2006 = 2006; 2006orLat = Later than 2006.

#### Notes

IE: (8) Operators shall implement procedures for resolving complaints; the NRA has the task to ensure that adequate complaint procedures are in place.

IT: (3) Conciliation Committee.

SE: (3) National Board for Consumer Complaints.

### **3 Reserved services**

**Table 14. Scope of reserved area**

	(1) Reserved area?	(2) Economic study	(3) Domestic corresp. reserved?	(4) Weight limit for reserved area	(5) Price limit for reserved area	(6) Price limit includes VAT?	(7) Inbound corresp. reserved?
AT	Y	N	Y	100	3	NP	Yes
BE	Y	Y	Y	100	3	NP	Yes
CY	Y	N	Y	100	3	Excl	Yes
CZ	Y	N	Y	100	3	NP	None
DE	Y	N	Y	100	3	Excl	Yes
DK	Y	N	Y	100	3	Excl	Yes
EE	N						None
ES	Y		Y	100	3	NP	Yes
FI	N	N					None
FR	Y	Y	Y	100	3		Yes
GB	Y		Y	100	2.9		Yes
GR	Y	N	Y	100	3	Incl	Yes
HU	Y	N	Y	100	3	NP	Yes
IE	Y	N	Y	100	3		Yes
IT	Y	N	Y	100	3	NP	Yes
LT	Y	N	Y	100	3	Excl	Yes
LU	Y	N	Y	100	3	NP	Yes
LV	Y	N	Y	100	3	NP	Yes
MT	Y	N	Y	350	5	NP	Yes
NL	Y	N	Y	100	3	NP	Yes
PL	Y	N	Y	350	3	NP	Yes
PT	Y		Y	100	3	NP	Yes
SE	N	Y					None
SI	Y	N	Y	100	3	NP	Yes
SK	Y	N	Y	100	3	NP	None
IS							
LI							
NO	Y	Y	Y	100	3	Incl	Yes
BG	Y	N	Y	350	5	NP	Yes
RO	Y	N	Y	100	3	Incl	Yes
TR							

Sources: Col 1: 214RA Q1; Col 2: 214RA Q10; Col 3: 214RA Q2; Col 4: 214RA Q3; Col 5: 214RA Q4; Col 6: 214RA Q5; Col 7: 214RA Q6

Column 4: 50 = 50 grams; 100 = 100 grams; 350 = 350 grams; Other = Other weight limit - use Explanatory Notes.; None = No weight limit.

Column 5: 2.5 = 2.5 times public tariff for lowest weight in FSC; 3 = 3 times public tariff for lowest weight in FSC; 5 = 5 times public tariff for lowest weight in FSC; None = No price limit; Other = Other price limit - use Explanatory Notes..

Column 6: NP = No position; Incl = Price limit is multiple of tariff including VAT; Excl = Price limit is multiple of tariff excluding VAT.

Column 7: Yes = Yes, same as for domestic correspondence; Different = Yes, but differs from domestic - use Explanatory Notes; None = No reserved area for inbound cross border mail.

#### Notes

1) Column 2 indicates whether the NRA has prepared "an economic study relating the extent of the reserved area to the maintenance of universal service." Four NRAs answered affirmatively and referred to supporting documents as follows:

BE: Each year the BIPT calculates the cost of the universal service. This study is carried out since 2000.

FR: RISE consultant (not public).

PL: The study of mail flows was carried out in 2001 by the headquarters of Poczta Polska. On this basis the economic assessment of reserved area was made.

NO: The government does a study of the consequences of a liberalisation beyond the requirements of the postal directive. The study is to be finished by end of March 2004. The study is based on a report by London Economics, which is available at [www.sd.no](http://www.sd.no).

Of these documents, only the Norwegian study appears to represent an economic study of the type requested.

**Table 15. Reservation of specific services**

	(1) Direct mail reserved?	(2) Outbound cross border reserved?	(3) Outbound CB policy	(4) Document exch reserved?	(5) Bulk mail exempt?	(6) Upstream servs.exempt?	(7) Special servs. exempt?
AT	None	No		N	N	N	N
BE	Yes	No		N	N		
CY	Yes	Yes	Specific	N	N	N	Y
CZ	None	No	Other	N	N	N	N
DE	Different	No		N	N	N	Y
DK	None	No		N	N	N	Y
EE	None	No					
ES	None	Yes	Specific	N	Y	N	Y
FI	None	No					
FR	Yes	No		N	N	N	Y
GB	Yes	No		N	Y	Y	N
GR	Yes	Yes	Specific	N	N	N	N
HU	Yes	Yes	Liberal	N	N	N	N
IE	Yes	No		N	N		
IT	None	Yes	Liberal	N	N	N	N
LT	None	Yes	Liberal	N	N	N	N
LU	Yes	Yes	Specific	N	N	N	N
LV	None	Yes	Liberal	N	N	N	N
MT	Yes	Yes	Specific	N	N	N	N
NL	None	No		N	N	N	Y
PL	Yes	Yes	Specific	N	N	N	N
PT	Yes	Yes	Other	N		N	N
SE	None	No					
SI	Yes	No		N	Y	Y	N
SK	Yes	Yes	Specific	N	N	N	Y
IS							
LI							
NO	Yes	No		N	Y	N	N
BG	None	Yes	Other	N	N	N	N
RO	None	No		N	N	N	Y
TR							

Sources: Col 1: 214RA Q7; Col 2: 214RA Q8; Col 3: 214RA Q9; Col 4: 214RA Q12; Col 5: 214RA Q13; Col 6: 214RA Q14; Col 7: 214RA Q15

Column 3: Liberal = Certain sectors already liberalised; Specific = Specific characteristics of Member State; Other = (see Notes below).

#### Notes

1) Columns 1 (direct mail) and 2 (outbound cross border mail) indicates whether there is a reservation applied to direct mail and outbound cross border that is the same as the reservation for domestic correspondence.

2) Column 3 (outbound cross border policy) indicates which of several possible policy justifications cited in the Postal Directive is relied upon to justify the reservation of outbound cross bordermail. See Article 7(1), paragraph 5 (as amended by Directive 2002/39).

3) Column 7 (special services) indicates whether "special services distinct from the universal service" are specifically exempt from the reserved area".

## **4 Authorisation of competitive postal operators**

**Table 16. Authorisation of CPOs inside the universal service**

	(1) Scope of gen auth	(2) Scope of licence	(3) Licence wt limit	(4) Licence price limit	(5) Licence granted by	(6) Licence conditions	(7) Licence term	(8) Annual licence fee
AT	None	None						
BE		NonRes	None	None	NRA	K		
CY	None	NonRes	None	None	NRA	ABCDEFGHIJK	Other	>1000
CZ	None	NonRes	None	None	MinPost	K	Unlimited	None
DE	None	CorDm	1000	None	NRA	ACEFI	Unlimited	None
DK	NonRes	None						
EE	None	All	None	None	NRA	ABCGHK	5	None
ES	None	NonRes	None	None	NRA	ABCDGHIJ	Unlimited	None
FI	None	All		None	Council	AIEFGH	Other	Other
FR	None	None						
GB		LP	350	Fixed	NRA	ABCDEFH	Other	Other
GR	None	NonRes	None	None	NRA	ABCDFIJ	CPO defi	Other
HU	None	NonRes	None	None	NRA	ABCEFHJK	Unlimited	None
IE	NonRes	None						
IT	None	NonRes	None	None	NRA	HIJ	Other	<1000
LT	None	NonRes		None	None		Other	Other
LU	NonRes							
LV	None	NonRes	None	None	NRA	ABCGH	Other	Other
MT	None	NonRes	None		MinPost	ABCDFHI	Other	Other
NL								
PL	Non corr	Corr	None	None	NRA	ACFIK	Other	None
PT		NonRes			NRA	ACDEFK	Other	>1000
SE		LP	None	None	NRA	A	Unlimited	Other
SI	NonRes	None	None	None		ABCEFHK	Other	>1000
SK	NonRes	None			NRA	ABCDEFHG	Other	None
IS								
LI								
NO	NonRes	ResServs			MinPost	K	Other	Other
BG	None	NonRes	None	None	NRA	ABCDEFHI	Other	None
RO	None	NonRes	None	None	NRA	ABCFHIJ	10	Other
TR								

Sources: Col 1: 215AL Q10; Col 2: 215AL Q12; Col 3: 215AL Q13; Col 4: 215AL Q14; Col 5: 215AL Q15; Col 6: 215AL Q16; Col 7: 215AL Q17; Col 8: 215AL Q19

Column 1: None = General authorisation not used for univ. servs.; NonLic = All universal services outside licensed area; NonRes = All universal services outside reserved area; All = General authorisation applies to all univ. servs.; Other = (see Notes below).

Column 2: None = Licenses not used for universal services; Cor = Correspondence only; CorDm = Correspondence and direct mail only; LP = All letter post items including periodicals; All = All universal services including parcels; Other = (see Notes below).

Column 3: None = No limit; 2000 = 2 kilograms; 1000 = 1 kilogram; 500 = 500 grams; 350 = 350 grams; 100 = 100 grams.

Column 4: None = No price limit applies; 2.5 = 2.5 times public tariff for lowest weight in FSC; 3x = 3 times public tariff for lowest weight in FSC; 5x = 5 times public tariff for lowest weight in FSC; Fixed = Fixed amount - use Explanatory Notes; Other = Other price limit - use Explanatory Notes.

Column 5: NRA = National regulatory authority; MinPost = Minister responsible for postal sector; MinOther = Minister other



than the minister responsible for post; Ombud = Public ombudsman; PM = Prime Minister; Council = Council of Ministers; Parl = Parliament; Court = Courts of law; None = Authority not clearly defined; Other = (see Notes below).

Column 6: A = Confidentiality of correspondence; B = Restrictions on dangerous goods; C = Data protection requirements; D = Environmental protection requirements; E = Minimal capital or financial guarantees; F = Technical or operational competence; G = Universal service obligation similar to USP; H = Quality, availability, performance, or price of services; I = Non-infringement of reserved area of USP; J = Contribution to universal service fund; K = (see Notes below).

Column 7: Unlimited = No time limit on license; 5 = 5 years; 4 = 4 years; 3 = 3 years; Other = (see Notes below).

Column 8: None = No fee; <100 = 100 Euros or less; <1000 = 1000 Euros or less; >1000 = More than 1000 Euro; Other = (see Notes below).

#### **Notes**

**Table 17. Number of licensed CPOs inside universal service, 1998-2003**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003
AT						
BE						
CY	0	0	0	0	0	0
CZ			0	0	0	0
DE	165	600	775	860	860	1020
DK	0	0	0	0	0	0
EE					0	0
ES			326	396	441	470
FI	0	0	0	0	0	1
FR						
GB				6	14	18
GR		0	0	0	1	1
HU	0	0	0	0	0	0
IE			0	0	0	0
IT	0	0	228	263	307	331
LT						
LU	0	0	0	0	0	0
LV						
MT						0
NL						
PL	19	21	21	30	52	59
PT				1	3	3
SE	80	64	46	41	35	33
SI						0
SK					0	0
IS						
LI						
NO	1	1	1	1	2	2
BG						
RO						1
TR						

Sources: 331NR Q14.

#### Notes

1) In several cases, NRAs provided the number of CPOs authorised by individual license in response to a question requesting the number of CPOs authorised by general authorisation, or provided the number of CPOs authorised for service within the universal service area in response to a question requesting the number of CPOs authorised outside the universal service area, or both. WIK has reassigned answers to the correct questions to the extent possible.

2) In DK, IE, LU, PL, SK, general authorisations for services outside the universal service area also permit service inside the universal service area. In LT, the NRA reported 1 general authorisation was issued in the years 1998 to 2003 to provide services inside the universal service area. In SI, general authorisations to provide services inside (but not outside) the universal service area were issued as follows: 5 (2002), 12 (2003).

**Table 18. Compensation funds**

	(1) Compensation fund authorised	(2) Agency authorised to set up fund	(3) Compensation fund established in fact
AT			N
BE	Y	Parl	N
CY	Y	NRA	N
CZ	N		N
DE	Y	NRA	N
DK	N		N
EE	N		N
ES	Y	NRA	N
FI	N		N
FR			
GB	N		N
GR	Y	MinPost	N
HU	N		N
IE	N		N
IT	Y	NRA	Y
LT	N		N
LU	N		N
LV	Y	Council	N
MT	N		
NL	N		N
PL	N		N
PT	Y	NRA	N
SE	N		N
SI	Y	NRA	N
SK	N		N
IS			
LI			
NO	N		N
BG	N		N
RO	Y	NRA	N
TR			

Sources: Col 1: 215AL Q21; Col 2: 215AL Q22; Col 3: 215AL Q23

Column 2: NRA = National regulatory authority; MinPost = Minister responsible for postal sector; MinOther = Minister other than the minister responsible for post; Ombud = Public ombudsman; PM = Prime Minister; Council = Council of Ministers; Parl = Parliament; Court = Courts of law; None = Authority not clearly defined; Other = (see Notes below).

#### Notes

**Table 19. Authorisation of CPOs outside the universal service**

	(1) Scope of authorisation	(2) Type of authorisation	(3) Authorisation granted by	(4) Conditions on authorisation	(5) Explicit decision req'd	(6) Term of authorisation	(7) Fee for authorisation
AT	None						
BE	All	GA	NRA	K	Y		
CY	All	GA	NRA	ABCDK		No limit	Other
CZ	All	License	MinPost		Y	No limit	None
DE	None						
DK	All	GA	NRA				
EE	All	GA & Lic	NRA	ABCK	N	No limit	None
ES	All	GA	NRA	ABCDHI	Y	No limit	None
FI	None					Other	Other
FR	None						
GB	None						
GR	All	GA	NRA	ABCDFI	N	CPO defined	Other
HU	All	GA	NRA	ABCDFHIK	N	No limit	None
IE	All	GA	NRA	ABCDIK	Y	No limit	Other
IT	All	GA	NRA	HI	N	Limited	<1000
LT	All	GA	NRA	ACI	N	No limit	None
LU	All	GA	NRA	BCDIK	Y	No limit	None
LV	NonEx	GA	NRA	ABC	Y	No limit	Other
MT	All	GA	NRA	ABCDFI	Y	Other	Other
NL	None						
PL	All	GA & Lic	NRA	ACFIK		Limited	None
PT	All	GA	NRA	ACDF	Y	No limit	>1000
SE	None						
SI	None						
SK	All	GA	NRA	ABCDFI	Y	No limit	None
IS							
LI							
NO	All	GA					
BG	All	GA	NRA	ABCDHI	N	No limit	None
RO	All	GA	NRA	ABCI	Y	No limit	Other
TR							

Sources: Col 1: 215AL Q1; Col 2: 215AL Q2; Col 3: 215AL Q3; Col 4: 215AL Q4; Col 5: 215AL Q5; Col 6: 215AL Q6; Col 7: 215AL Q8

Column 1: None = No authorisation required for any services; All = Authorisation required for all services; NonEx = Authorisation required for all services except express; Other = (see Notes below).

Column 2: GA = General authorisation; License = Individual license; Other = (see Notes below).

Column 3: NRA = National regulatory authority; MinPost = Minister responsible for postal sector; MinOther = Minister other than the minister responsible for post; Ombud = Public ombudsman; PM = Prime Minister; Council = Council of Ministers; Parl = Parliament; Court = Courts of law; None = Authority not clearly defined; Other = (see Notes below).

Column 4: A = Confidentiality of correspondence; B = Restrictions on dangerous goods; C = Data protection requirements; D = Environmental protection requirements; E = Minimal capital or financial guarantees; F = Technical or operational competence; G = Universal service obligation similar to USP; H = Quality, availability, performance, or price of services; I = Non-infringement of reserved area of USP; J = Contribution to universal service fund; K = (see Notes below).

Column 6: No limit = No time limit on period of validity; Limited = Valid for fixed number of years; Other = (see Notes below).

Column 7: None = No fee; <100 = 100 Euros or less; <1000 = 1000 Euros or less; >1000 = More than 1000 Euro; Other = (see Notes below).

**Notes**

1) Column 5 indicates the NRA's answer to the question whether a CPO may begin service without an explicit decision by the NRA. According to Article 2 of the Postal Directive, a "general authorisation" is an authorisation "which does not require the undertaking to obtain an explicit decision" by the NRA before beginning service. A "Y" in column 5 is therefore inconsistent with a "GA" (general authorisation) in column 2. In the report, authorisation which the NRA characterizes as a general authorisation but which requires an explicit decision by the NRA before service can begin is referred to as an "individualised general authorisation".

**Table 20. Number of authorised CPOs outside universal service, 1998-2003**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003
AT						
BE						
CY	0	0	0	0	0	0
CZ			2	9	11	18
DE						
DK	1657	1842	1895	1940	1935	1959
EE					14	23
ES		1423	1738	1919	2108	2304
FI	0	0	0	0	0	0
FR						
GB						
GR	0	152	174	224	262	295
HU	0	0	0	0	6	51
IE			0	0	0	0
IT	0	0	820	1029	1232	1356
LT	0	0	0	0	39	65
LU				15	17	17
LV				19	23	27
MT						0
NL						
PL	0	0	0		0	0
PT				5	7	11
SE	0	0	0	0	0	0
SI					0	0
SK					7	13
IS						
LI						
NO	0	0	0	0	0	0
BG				25	25	32
RO						126
TR						

Sources: 331NR Q12.

**Notes**

1) In several cases, NRAs provided the number of CPOs authorised by individual license in response to a question requesting the number of CPOs authorised by general authorisation, or provided the number of CPOs authorised for service within the universal service area in response to a question requesting the number of CPOs authorised outside the universal service area, or both. WIK has reassigned answers to the correct questions to the extent possible.

## **5 Tariff principles**

**Table 21. Services subject to price regulation**

	(1) Regulator	(2) Servs subj to ex ante reg	(3) Servs subj to price caps	(4) Price cap index	(5) Servs subj to ex post	(6) Costs used	(7) Last rate case
AT	MinPost	B				Other	2003
BE	NRA	ABCDEFGH					
CY	NRA	ABCDEFGH	ABCDEFGH		ABCDEFGH		never
CZ	MinPost	ABG	ABG		ABG	Actual costs	2002
DE	NRA	BDFKL	BDFKL	RPI-1.8%	GHL	LRIC	2003
DK	MinPost		BDFL	CPI-1%*			2004
EE	NRA	ABCDEFGH			ACH	Actual costs	2000
ES	Council	B	A			Actual costs	2004
FI	NRA	L	L		L	Actual costs	2004
FR	MinPost	BDFL	BCDEFGL	RPI	BCDEFH	Actual costs	2003
GB	NRA	ACEGHJK	ACEGHJK		ACEGHJK		2002
GR	NRA	ABCDEFGHL				Other	2003
HU	Parl	B			L	Other	never
IE	NRA	BDFK			ACEGHK	Other	2003
IT	MinPost	ABCDEFGHL		Mixed		Actual costs	2003
LT	NRA	AG	AG		AG	Actual costs	1999
LU	NRA	B				Actual costs	2003
LV	Parl	AG	A		I	Actual costs	1998
MT	NRA	ABCDEFGH					
NL	MinPost	ABCDEFGH		labor wage index			2003
PL	NRA	L	L		L	Actual costs	never
PT	NRA	BDF		CPI-0.5%*	ABCDEFGH	Other	2004
SE	NRA		A	RPI		Actual costs	2003
SI	NRA	L	L		L	LRIC	2003
SK	NRA	ABCDEFGHL	L		L	Actual costs	2004
IS							
LI							
NO	NRA	BDF			ABCDEFGF	Actual costs	2004
BG	NRA		ABCDGH	Mixed*			2004
RO	NRA	B					
TR							

Sources: Col 1: 211RF Q26; Col 2: 217PR Q1; Col 3: 217PR Q2; Col 4: 217PR Q3; Col 5: 217PR Q4; Col 6: 217PR Q5; Col 7: 217PR Q6

Column 1: NRA = National regulatory authority; MinPost = Minister responsible for postal sector; MinOther = Minister other than the minister responsible for post; Ombud = Public ombudsman; PM = Prime Minister; Council = Council of Ministers; Parl = Parliament; Court = Courts of law; None = Authority not clearly defined; Other = (see Notes below).

Columns 2, 3, and 5: A = All single piece correspondence; B = Reserved single piece correspondence; C = All bulk correspondence; D = Reserved bulk correspondence; E = Bulk direct mail; F = Reserved bulk direct mail; G = Parcels - single piece; H = Parcels - bulk; I = Express services; J = Unaddressed items; K = Worksharing products; L = Other services - use Explanatory Notes.

Column 4: CPI = Consumer price index; RPI = retail price index. For "mixed" and items with asterisk (\*) see Notes.

Column 6: Actual costs = Actual costs; LRIC = Efficient costs (e.g., LRIC); Other = Other benchmark - use Explanatory Notes.

#### Notes



**Table 22. Special tariffs for correspondence**

	(1) Discount rate avail?	(2) Percent of IOC	(3) Discount types	(4) Min. pct. discount	(5) Max. pct. discount	(6) Avoided cost basis?	(7) Trans- parent?	(8) Avail. to consolidator	(9) Avail. to CPO?
AT									
BE	Y		ABCD						
CY	Y		AB	15	29	Y	Y	Y	Y
CZ									
DE	Y		BC	2	23	Y	Y	Y	Y
DK	Y		B	2	6	Y	Y	Y	Y
EE	Y		A	5	15	N	Y	Y	Y
ES	Y		BC			Y	Y		
FI	Y		BC						
FR	Y	48	BD	1	12	Y	Y		
GB	Y		BC						
GR	Y		ABC	0,5	4	Y	Y	Y	Y
HU	Y		BD	1	35	Y	Y	Y	Y
IE	Y	25	ABCD	4,2	18,75	Y	Y	Y	Y
IT	Y					Y	Y	Y	Y
LT	Y		ABC						
LU	Y		ABC						
LV	Y		AB	3	50	Y	Y	N	N
MT									
NL	Y	92	ABD	5		Y	Y	Y	Y
PL	Y		ABC			N			N
PT			D	1,5	20	Y	Y	Y	Y
SE	Y	60	AB	17	19	Y	Y	Y	Y
SI	Y		AB	0,5	2	Y	Y		
SK	Y		ABC			Y	Y		
IS									
LI									
NO	Y		AB	6	16	Y	Y	N	Y
BG	Y		BC	0,5	30	N	Y		
RO									
TR									

Sources: Col 1: 217PR Q9; Col 2: 217PR Q17; Col 3: 217PR Q10; Col 4: 217PR Q11; Col 5: 217PR Q13; Col 6: 217PR Q15; Col 7: 217PR Q16; Col 8: 217PR Q18; Col 9: 217PR Q19

Column 3: A = Volume of mailing only; B = Presorting and other mail preparation; C = Transport to a sorting center or office near addressee; D = (see Notes below).

#### Notes

**Table 23. Special tariffs for direct mail**

	(1) Discount rate avail?	(2) Percent of DM	(3) Discount types	(4) Min. pct. discount	(5) Max. pct. discount	(6) Avoided cost basis?	(7) Trans- parent?	(8) Avail. to consolidator	(9) Avail. to CPO?
AT									
BE	Y		ABCD					Y	Y
CY	Y		AB	15	29	Y	Y	Y	Y
CZ									
DE	Y		B	2	7	Y	Y	Y	Y
DK	Y		A	6	16				N
EE	Y		A	5	15	N	Y	Y	Y
ES	Y		BC			Y	Y		
FI			D						
FR	Y	100	BD			Y	Y		
GB									
GR			ABC	0,5	4	Y	Y	Y	Y
HU	Y		BD	1	35	Y	Y	Y	Y
IE	Y	100	ABCD	20,8	41,7	N	Y	Y	Y
IT	Y	100	A	3,4	10,3	Y	Y	Y	Y
LT	Y		ABC						
LU									
LV	Y		A	10	30	Y	Y	N	N
MT									
NL	Y		ABD						
PL	Y		ABC			N			N
PT			D	2,5	18	Y	Y	Y	Y
SE	Y	100	AB	14	17	Y	Y	Y	Y
SI	Y		AB						
SK	Y	98	AB	11,4	15,7	Y	Y		
IS									
LI									
NO	Y		AB	19	29	Y	Y	N	Y
BG	Y		BC	0,5	20	N	Y		
RO									
TR									

Sources: Col 1: 217PR Q20; Col 2: 217PR Q28; Col 3: 217PR Q21; Col 4: 217PR Q22; Col 5: 217PR Q24; Col 6: 217PR Q26; Col 7: 217PR Q27; Col 8: 217PR Q29; Col 9: 217PR Q30

Column 3: A = Volume of mailing only; B = Presorting and other mail preparation; C = Transport to a sorting center or office near addressee; D = (see Notes below).

#### Notes

**Table 24. Special tariffs for parcels**

	(1) Discount rate avail?	(2) Pct. of parcels	(3) Discount types	(4) Min. pct. discount	(5) Max. pct. discount	(6) Avoided cost basis?	(7) Trans- parent?	(8) Avail. to consolidator	(9) Avail. to CPO?
AT									
BE	Y		ABCD					Y	Y
CY	Y		A	10	29	Y	Y	Y	Y
CZ									
DE	Y		BC						
DK	N								
EE	N								
ES	Y		BC			Y	Y		
FI			D						
FR	Y		BC						
GB									
GR	Y		ABC	7	25	Y	Y	Y	Y
HU	Y		BD	3	36	Y	Y	Y	Y
IE	Y		D						
IT	Y	82	AB	25	56	Y	Y	Y	Y
LT	Y		ABC						
LU									
LV	Y		A	3	15	Y	Y	N	N
MT									
NL	Y		ABD						Y
PL	Y		ABC			N			N
PT			D	6	20	Y	Y	Y	Y
SE	Y		AC						
SI	Y		AB						
SK	Y		AB			Y	Y		
IS									
LI									
NO	Y		A						
BG	Y		A	3	15	N	Y		
RO									
TR									

Sources: Col 1: 217PR Q31; Col 2: 217PR Q39; Col 3: 217PR Q32; Col 4: 217PR Q33; Col 5: 217PR Q35; Col 6: 217PR Q37; Col 7: 217PR Q38; Col 8: 217PR Q40; Col 9: 217PR Q41

Column 3: A = Volume of mailing only; B = Presorting and other mail preparation; C = Transport to a sorting center or office near addressee; D = (see Notes below).

#### Notes

**Table 25. NRA rate cases, 1998-2003**

	(1) Type of case	(2) 1998	(3) 1999	(4) 2000	(5) 2001	(6) 2002	(7) 2003
DE	Rate					2	1
DE	Discount		23	104	78	103	117
FI	Rate						1
GB	Discount						1
GB	Rate				1	1	
GR	Cross Sub				1	1	1
IE	Discount					1	1
IE	Rate					1	1
IE	Term. dues						1
IT	Rate			79	440	443	378
LU	Rate						1
NL	Discount				1	2	1
NL	Cross Sub	1					
PT	Cross Sub	2	2	2	3	3	3
PT	Discount	4	4	4	8	6	8
PT	Rate	4	4	4	8	6	8
PT	Term. dues	2	2	2	3	3	3
SE	Rate	2		7	2	4	3
SI	Rate						2
SK	Rate					2	11
SK	Cross Sub					1	1
SK	Discount						3

Sources: 331 NRA Q15, Q16, Q17, Q18

#### Notes

1) This table lists the number of "formal investigations" started by each NRA for the years 1998 to 2003. NRAs not listed in this table did not report any formal investigations relating to public tariffs (rates), special tariffs (discount), cross-subsidy, or terminal dues. The number of cases reported for the GB NRA is incomplete; entries for the GB NRA were completed by WIK from known cases since the GB NRA did not respond to these questions.

## **6 Transparency of USP accounts**

**Table 26. Accounting requirements in law (NRA)**

	(1) Trans- parency required	(2) Separate accts (unv & non)	(3) Separate accts (res & unres)	(4) Allocate costs by Art 14	(5) Allocate costs by other	(6) Verifies USP accounts	(7) Acct'g sys. approved (first)	(8) Acct'g sys. approved (last)	(9) Compli- ance statement
AT	Y	Y	Y	Y	N	Auditor	2000	2000	Y
BE	Y	Y	Y	Y	N	NRA	2000	2002	Y
CY	Y	Y	Y	N	N	NRA	Never	Never	N
CZ	Y	Y	Y	Y	N	NRA	2001	2002	N
DE	Y	Y	Y	Y	N	NRA	2000	2002	Y
DK	Y	Y	Y	Y	N	Auditor	Pre-2000	2003	Y
EE	Y	Y	N	Y	N	Auditor	Never	Never	N
ES	Y	Y	Y	N	Y	NRA	Never	Never	N
FI	Y	Y		Y	N	NRA	2002	2002	Y
FR	Y	Y	Y	Y	N	MinPost	2001	2001	N
GB	Y	Y		Y		NRA		2002	Y
GR	Y	Y	Y	Y	N	NRA	2001	2001	N
HU	Y	Y	Y	Y	N	NRA	2002	2002	Y
IE	Y	Y	Y	Y	N	Auditor			
IT	Y	Y	Y	Y	N	Auditor	Pre-2000	2002	Y
LT	Y	Y	Y	N	N	NRA	Never	Never	N
LU	Y	Y	Y	Y		NRA	Never	Never	Y
LV	Y	Y	Y	N	Y	NRA	Never	Never	N
MT	Y	Y	Y			NRA	Never	Never	
NL	Y	Y	Y	Y	N	Auditor	2000	2000	Y
PL	Y	Y	Y	Y		NRA	Never	Never	
PT	Y	Y	Y	Y	N	Auditor	Pre-2000	2002	Y
SE	Y	N	N			NRA	Pre-2000	2002	N
SI	Y	Y	Y	Y	N	NRA	Pre-2000	Pre-2000	N
SK	Y	Y	Y	Y	N	Auditor	2002	2002	N
IS									
LI									
NO	Y	Y	Y	Y	N	MinPost	Pre-2000	2002	Y
BG	Y	Y	Y	Y	N	NRA	Never	Never	N
RO	Y	Y	Y	N	N	NRA	Never	Never	N
TR									

Sources: Col 1: 216AS Q1; Col 2: 216AS Q2; Col 3: 216AS Q3; Col 4: 216AS Q4; Col 5: 216AS Q5; Col 6: 216AS Q6; Col 7: 216AS Q8; Col 8: 216AS Q7; Col 9: 216AS Q9

Column 6: NRA = National regulatory authority; MinPost = Minister responsible for postal sector; MinOther = Minister other than the minister responsible for post; Ombud = Public ombudsman; PM = Prime Minister; Council = Council of Ministers; Parl = Parliament; Court = Courts of law; None = Authority not clearly defined; Other = (see Notes below).

#### Notes

1) Information in this table was provided by NRAs.

2) Columns 1 to 3 refer to the existence of a legal obligation provide transparency generally, to separate accounts for universal and non-universal services, and to separate accounts for reserved and non-reserved services, respectively.

3) Columns 4 and 5 provide answers to questions concerning whether the USP separates accounts according to the provisions of Article 14(3) of the Postal Directive or according to another accounting system as permitted in Article 14(4).

4) Column 9 provide answers to whether a statement concerning the compliance of accounts with the terms of the Postal Directive is published regularly as required by Article 14(5).

**Table 27. USP accounts, compliance with Directive, 2002**

	(1) Dir art 14 suspended?	(2) Res & unres accts separated?	(3) Univ & non- univ accts separated?	(4) NRA cost allocat. sys. avail?	(5) NRA cost allocat. sys. used?	(6) Cost allocat. sys. verified?	(7) USP accts audited?	(8) USP accts published?
AT	Y							
BE	N	Y	Y	Y	Y	Y	Y	Y
CY		N	N	N	N	N	Y	Y
CZ	N	Y	Y	N	N	N	Y	Y
DE	N	Y	Y	Y	Y	Y	Y	Y
DK	N	Y	Y	N	N		Y	Y
EE	N	N	N	N	N	N	Y	Y
ES	Y	N	N	N	N	N	N	Y
FI	N	N	Y	N	N	N	N	Y
FR		Y	Y	Y	Y	Y	Y	N
GB							Y	
GR	N	Y	Y	Y	Y	Y	Y	Y
HU	N	Y	Y	Y	Y	Y	Y	Y
IE	N	Y	Y	N	Y		Y	Y
IT	N	Y	Y	N			Y	Y
LT	N	N	N	N	N	N	Y	Y
LU	N	N	N	N	N	N	Y	Y
LV	Y	N	N	N	N	N	Y	Y
MT								
NL	N	Y	Y	Y	Y	Y	Y	Y
PL							Y	
PT	N	Y	Y	Y	Y	Y	Y	Y
SE			N	N	N		Y	Y
SI							Y	Y
SK	N	N	N	Y	Y	N	N	Y
IS								
LI								
NO	N	Y	Y	N	Y	Y	Y	N
BG	N	Y	Y	N	N	N	N	N
RO								
TR								

Sources: Col 1: 331NR Q19; Col 2: 331NR Q20; Col 3: 331NR Q21; Col 4: 331NR Q22; Col 5: 331NR Q23; Col 6: 331NR Q24; Col 7: 331NR Q25; Col 8: 331NR Q26

#### Notes

1) Column 4 provides answers to whether there was in place, at the end of the year, a cost allocation system approved by the NRA. Column 5 refers to whether the USP in fact allocated accounts for the year according to an NRA-approved system of cost allocation.

2) Column 6 provides answers to whether a competent body verified USP compliance with a cost allocation system approved by the NRA. See Article 14(5) of the Postal Directive.

3) Columns 7 and 8 refer to whether USP accounts were independently audited and published in accordance with Article 15 of the Postal Directive. Article 15 does not necessarily refer to the detailed accounts required in Article 14.



4) Column 9 provide answers to whether a statement concerning the compliance of accounts with the terms of the Postal Directive is published regularly as required by Article 14(5).

**Table 28. USP accounts, compliance with Directive, 2003**

	(1) Dir art 14 suspended?	(2) Res & unres accts separated?	(3) Univ & non- univ accts separated?	(4) NRA cost allocat. sys. avail?	(5) NRA cost allocat. sys. used?	(6) Cost allocat. sys. verified?	(7) USP accts audited?	(8) USP accts published?
AT	Y							
BE	N	Y	Y	Y	Y	Y	Y	Y
CY	N	N	N	N	N	N	Y	Y
CZ	N	Y	Y	N	N	N	Y	
DE	N	Y	Y	Y	Y	Y	Y	Y
DK	N	Y	Y	N	N		Y	Y
EE	N	N	Y	N	N	N	Y	Y
ES	Y	N	N	N	N	N	N	Y
FI	N	N	Y	N	N	N	N	Y
FR		Y	Y	Y	Y	Y	Y	N
GB					Y	Y	Y	Y
GR	N	Y	Y	Y	Y	Y	Y	Y
HU	N	Y	Y	Y	Y	Y	Y	Y
IE	N			N				
IT	N	Y	Y	N			Y	Y
LT	N	N	N	N	N	N	Y	Y
LU	N			N	N		Y	Y
LV	Y	N	N	N	N	N	Y	Y
MT		N	N	N	N	N	Y	Y
NL	N	Y	Y	Y	Y	Y	Y	Y
PL	N	N	N	N	N	N	Y	N
PT	N	Y	Y					
SE			N	N	N		Y	Y
SI	N	N	N	N	N	N	N	N
SK	N	Y	Y	Y	Y	Y	Y	Y
IS								
LI								
NO	N	Y	Y	N	Y	Y	Y	N
BG	N	Y	Y	N	N	N	N	N
RO	N	N	N	N	N	N	N	N
TR								

Sources: Col 1: 331NR Q19; Col 2: 331NR Q20; Col 3: 331NR Q21; Col 4: 331NR Q22; Col 5: 331NR Q23; Col 6: 331NR Q24; Col 7: 331NR Q25; Col 8: 331NR Q26

#### Notes

1) Column 4 provides answers to whether there was in place, at the end of the year, a cost allocation system approved by the NRA. Column 5 refers to whether the USP in fact allocated accounts for the year according to an NRA-approved system of cost allocation.

2) Column 6 provides answers to whether a competent body verified USP compliance with a cost allocation system approved by the NRA. See Article 14(5) of the Postal Directive.

3) Columns 7 and 8 refer to whether USP accounts were independently audited and published in accordance with Article 15 of the Postal Directive. Article 15 does not necessarily refer to the detailed accounts required in Article 14.

## **7 National regulatory authorities**

**Table 29. National regulatory authorities**

	(1) NRA name	(2) Begin postal reg.	(3) Sectors regulated
AT	Ministry of Transport, Innov. and Techn.- Dept for Postal Affairs	3.3.1999	A
BE	Belgian Institute for postal services and telecommunications	21.3.1991	B
CY	Commissioner for Telecommunication and Postal Regulation	22.3.2002	B
CZ	Ministry of Informatics - Postal Services Department	1.7.2000	A
DE	RegTP (Regulatory Authority for Telecommunications and Posts)	1.1.1998	BG
DK	Road Safety and Transport Agency, Postal Supervisory Department	3.4.1995	G
EE	Estonian National Communications Board (ENCB)	1.1.2002	B
ES	Ministerio Fomento, Subd. Regulación Serv. Postales	2.2.1998	A
FI	Finnish Communications Regulatory Authority	1.1.1994	B
FR	Ministry of Industry		B
GB	Postcomm	1.9.2000	A
GR	National Telecommunications and Post Commission.	18.12.1998	BG
HU	National Communication Authority	1.1.1990	BG
IE	Commission for Communications Regulation	1.12.2002	BG
IT	Ministry of Communications	6.8.1999	A
LT	Communications Regulatory Authority	1.1.2002	B
LU	Institut National de Régulation (ILR)	15.12.2000	BCE
LV	Public Utilities Commission	1.6.2001	BCEF
MT	Malta Communications Authority	1.6.2003	BG
NL	OPTA (Onafhankelijke Post en Telecom Autoriteit)	1.8.1997	B
PL	URTIP (Office for Telecommunications and Post Regulation)	1.4.2002	BG
PT	ANACOM	2.7.1981	B
SE	National Post & Telecom Agency	1.3.1994	B
SI	Agencija za telekomunikacije, radiodifuzijo in pošto Republike Slovenije	15.6.2002	BG
SK	Postovy urad	1.1.2002	A
IS			
LI			
NO	Norwegian Post and Telecommunication Authority	1.6.1997	B
BG	Communications Regulation Commission.	5.2.2002	B
RO	National Regulatory Authority for Communications	25.9.2002	B
TR			

Sources: Col 1: 211RF Q6; Col 2: 211RF Q7; Col 3: 211RF Q8

Column 3: A = None; B = Telecommunications; C = Energy; D = Water ; E = Gas; F = Railway; G = (see Notes below).

#### Notes

**Table 30. NRA total and professional staff, 1998-2003**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003
AT						
BE	8 (4)	6 (3)	6 (3)	7 (4)	9 (5)	11 (7)
CY					5 (3)	5 (3)
CZ			11 (10)	10 (9)	8 (7)	12 (11)
DE						
DK	8 (3)	8 (3)	8 (3)	9 (4)	6 (3)	6 (3)
EE					8 (7)	7 (6)
ES			12 (12)	45 (45)	52 (52)	52 (52)
FI	3 (2)	3 (2)	3 (2)	3 (2)	9 (2)	9 (2)
FR						
GB						37 ( )
GR		2 (1)	3 (2)	3 (2)	4 (3)	7 (5)
HU	14 (13)	14 (13)	14 (13)	14 (13)	14 (13)	14 (13)
IE				2,5 (2,5)	5 (5)	5 (5)
IT	15 (3)	17 (3)	15 (3)	18 (4)	20 (6)	20 (6)
LT					5 (5)	5 (5)
LU				3 (1)	3 (1)	3 (1)
LV				2 (6)	2 (6)	2 (6)
MT						1 (1)
NL	3 (2)	3 (3)	4 (4)	5 (4)	5 (4)	4 (4)
PL					20 (20)	26 (26)
PT	6 (6)	6 (6)	6 (6)	6 (6)	6 (6)	7 (7)
SE	6 (6)	6 (6)	6 (6)	6 (6)	6 (6)	6 (6)
SI					1 (1)	2 (2)
SK					18 (13)	19 (14)
IS						
LI						
NO	5 (4)	5 (4)	6 (5)	4 (3)	4 (3)	5 (4)
BG					2 (2)	6 (6)
RO						
TR						

Sources: 331NR Q5, Q6

**Notes**

1) The table shows the number of staff of the NRA and, in parentheses, the number of professional staff.

**Table 31. NRA budget, 1998-2003**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003
AT						
BE	1.050	9.500	1.000	1.050	1.100	1.250
CY						256
CZ						
DE						
DK	671	739	657			
EE					32	64
ES						
FI	839	842	875	844	1.152	1.208
FR						
GB						12.998
GR				892	465	642
HU	282	325	357	426	789	747
IE				254	614	
IT	559	680	560	760	847	847
LT						
LU				303	190	475
LV				1.008	1.828	1.876
MT						
NL	368	532	564	797	828	895
PL						
PT			1.827	1.538	1.780	
SE	689	806	970	767	917	898
SI						
SK					235	241
IS						
LI						
NO						
BG						30
RO						
TR						

Sources: 331NR Q 9

**Notes**

**Table 32. NRA: elements of independence**

	(1) Who appoints NRA	(2) Who appoints USP	(3) Number of heads of NRA	(4) Term of office of NRA	(5) Reason to dismiss NRA	(6) NRA outside Min. bldg.	(7) Sources financing of NRA	(8) Who approves NRA exp	(9) Appeal to whom from NRA
AT	MinPost	Other	1	None	None	N	A	MinOther	Court
BE	Council	Council	4	> 5	Other	N	E	Other	Court
CY	Council	Other	1	5	Cause	N	D	Parl	Court
CZ	MinPost	MinPost	1	None	None	Y	A	Parl	Other
DE	Council	MinOther	3	5	None	N	A	Parl	Court
DK	MinPost	MinPost	1	None	None	N	A	MinPost	MinPost
EE	MinPost	MinPost	1	None	Discretion	N	A	MinPost	Court
ES	MinPost	MinPost	1	None	Discretion	Y	B	MinPost	MinPost
FI	Council	MinPost	1	None	Cause	N	D	MinPost	Court
FR	Council	PM			Other	N	A	MinOther	Court
GB	MinPost	MinPost	7	3	Cause	N	D	MinOther	Other
GR	Other	Other	> 5	5	Cause	N	CD	NRA	Court
HU	MinPost	MinOther	> 5	5	Other	N	D	Council	Court
IE	MinPost	MinPost	1 to 3	3 to 5	Cause	N	E	NRA	Court
IT	PM	MinOther	1	5	Discretion	Y	E	Other	Court
LT	Other	MinPost	1	5		N	AD	Parl	Court
LU	Council	MinPost	3	> 5	Cause	N	ABD	Council	Parl
LV	Parl	MinPost	5	5	Cause	N	A		Court
MT	MinPost	MinOther	5	3	Cause	N	ACD	MinPost	Other
NL	MinPost	Other	3	4	None	N	BD	MinPost	Court
PL	PM	MinPost	3	5	Cause	N	A	Council	Court
PT	Council		3	5	Cause	N	DE	MinPost	Court
SE	Council	Council	> 5	> 5	Cause	N	AD	MinPost	Court
SI	Council	Other	1	5	Cause	N	D	Parl	Court
SK	Parl	MinPost	1	6	Cause	N	B	Parl	Court
IS									
LI									
NO	MinPost	MinPost	1	None	None	N	CD	MinPost	Other
BG	PM	MinPost	5	5	Cause	Y	AD	Parl	Court
RO	PM	MinPost	1	5	Cause	Y	D	Council	Court
TR									

Sources: Col 1: 211RF Q10; Col 2: 211RF Q5; Col 3: 211RF Q9; Col 4: 211RF Q11; Col 5: 211RF Q12; Col 6: 211RF Q13; Col 7: 211RF Q14; Col 8: 211RF Q15; Col 9: 211RF Q17

Columns 1, 2, 8, 9: NRA = National regulatory authority; MinPost = Minister responsible for postal sector; MinOther = Minister other than the minister responsible for post; Ombud = Public ombudsman; PM = Prime Minister; Council = Council of Ministers; Parl = Parliament; Court = Courts of law; None = Authority not clearly defined; Other = (see Notes below).

Column 7: A = General government budget; B = Funds from ministry responsible for postal sector; C = Funds from universal service provider; D = Fees charged authorised operators; E = (see Notes below).

#### Notes

**Table 33. NRA: enforcement powers**

	(1) Set new tariffs	(2) Cancel illegal tariffs	(3) Set down- stream access	(4) Obtain existing info	(5) Require new studies	(6) Set acct'g standards	(7) Obtain CPO info	(8) Impose fines	(9) Seek judicial order
AT					Y	Y			
BE					Y	Y	Y	Y	Y
CY		Y			Y	Y	Y	Y	Y
CZ	Y	Y			Y	Y		Y	
DE	Y	Y	Y	Y	Y	Y	Y	Y	Y
DK	Y				Y				
EE			Y	Y	Y	Y	Y		
ES		Y			Y	Y	Y		
FI			Y	Y	Y	Y		Y	
FR			Y	Y	Y	Y	Y		Y
GB	Y	Y	Y	Y	Y	Y	Y	Y	Y
GR			Y	Y		Y		Y	Y
HU			Y	Y	Y	Y	Y	Y	Y
IE					Y	Y			Y
IT	Y	Y	Y	Y	Y	Y	Y	Y	
LT						Y	Y	Y	Y
LU						Y	Y		Y
LV					Y		Y		
MT	Y	Y	Y	Y	Y	Y	Y	Y	Y
NL					Y	Y		Y	Y
PL					Y	Y	Y	Y	Y
PT	Y	Y	Y	Y	Y	Y	Y	Y	
SE		Y			Y	Y	Y		
SI	Y				Y	Y	Y	Y	
SK	Y	Y			Y	Y	Y	Y	Y
IS									
LI									
NO	Y	Y			Y	Y		Y	
BG			Y	Y	Y	Y	Y	Y	Y
RO	Y	Y	Y	Y	Y	Y	Y	Y	Y
TR									

Source: 211RF Q16

**Notes**



---

**- Appendix C -**  
Sector Development

---



## List of Tables

### 1 Market development

#### 1.1 Overall market development

#### 1.2 Competition and market shares

Table 1 Market structure indicators in the perception of USPs and NRAs, letter post

Table 2 Market structure indicators in the perception of USPs and NRAs, parcel and express services

Table 3 Perceived competition in all market segments, 2003 - USP (NRA)

Table 4 Perceived competition in the domestic letter market, 1998-2003

Table 5 Perceived competition in the domestic parcel market, 1998-2003

Table 6 Perceived competition in the domestic express market, 1998-2003

Table 7 Perceived competition in the unaddressed mail market, 1998-2003

Table 8 Perceived competition in the outbound cross-border letter market, 1998-2003

Table 9 Perceived competition in the outbound cross-border parcel market, 1998-2003

Table 10 Perceived competition in the outbound cross-border express market, 1998-2003

#### 1.3 Business strategies

Table 11 Legal status and ownership of USPs in 2003

Table 12 USP business lines, 1998-2003

## 1.4 Demand structure and development

- Table 13 Demand structure, letter post, expected future development
- Table 14 Expected volume development, letter post, 2004-2009
- Table 15 Factors influencing letter mail volumes in the next 5 years
- Table 16 Future development of postal services in 5 and 10 years (in %)
- Table 17 Future role of postal services
- Table 18 Past and future importance of postal services

## 2 USP development

### 2.1 Overall situation of USPs

- Table 19 USP total revenues, EUR million, 1998-2003

### 2.2 Mail volumes

- Table 20 USP domestic letter post volume, million items, 1998-2002
- Table 21 USP domestic letter post volume per capita, 1998-2002
- Table 22 USP domestic letter post volume per 1,000 EUR GDP, 1998-2002

### 2.3 Price performance

- Table 23 USP tariffs for 20g letters of fastest standards category, EUR
- Table 24 USP tariffs for 20g letters of fastest standards category, PPS
- Table 25 Selected tariffs for domestic correspondence of fastest standard category in EUR and PPS, 2003
- Table 26 USP tariffs for second class correspondence
- Table 27 USP tariffs for domestic single parcels, 5kg, in EUR, 1998-2003
- Table 28 USP tariffs for domestic single parcels, 5kg, in PPS, 1998-2003

### 2.4 Technological and productivity developments

- Table 29 Introduction of automated processes by USPs

### **3 Universal service**

#### **3.1 Access to universal service**

Table 30 Number of post offices and agencies

Table 31 Number of postal agencies

Table 32 Number of post offices staffed by USP's employees

Table 33 USP access: Postal outlets per 1,000 skm, 1998-2003

Table 34 USP access: Postal outlets per 10,000 persons, 1998-2003

Table 35 Number of street letter boxes

Table 36 USP access: Collection boxes per 1,000 skm, 1998-2003

Table 37 USP access: Collection boxes per 10,000 persons, 1998-2003

#### **3.2 Quality of service**

Table 38 Development of quality of postal services in the last 5 years

Table 39 Transit time targets for the fastest standard category (D+1)

Table 40 Transit time performance for the fastest standard category (D+1)



## **1 Market development**

### **1.1 Overall market development**

### **1.2 Competition and market shares**

**Table 1. Market structure indicators in the perception of USPs and NRAs, letter post**

	(1) Competition - last 5 years	(2) Competition - future 5 years	(3) Choice	(4) Estimated CR3 - domestic	(5) Estimated CR3 - outgoing cb
AT	4 (3)	5 (4)	(0)		
BE	4 (4)	5 (4)	(0)		90 (40)
CY	3 (3)	4 (4)	(0)		
CZ	(3)	(4)	(1)	(100)	(100)
DE	(4)	(4)	(5)	(98)	(98)
DK	4 (3)	5 (3)	(1)	100 (100)	95
EE	5 (3)	5 (4)	100 (1)	98 (100)	98 (100)
ES	4 (4)	0 (3)	(10)	100	95
FI	(3)	(3)	(5)	(98)	(98)
FR	4 (3)	5 (4)	(0)	(100)	(95)
GB	4	5		100	
GR	4 (3)	4 (3)	10 (1)	95 (100)	95 (100)
HU	4 (3)	5 (3)	5 (1)	98 (100)	100 (100)
IE	(4)	(4)	(1)	(100)	(100)
IT	4 (4)	4 (4)	75 (0)	98	98
LT	5 (4)	4 (4)	75 (0)	(98)	(98)
LU	5 (1)	5 (5)	(0)	98 (98)	98 (98)
LV	4 (4)	5 (4)	(0)	98 (100)	100 (100)
MT	4 (3)	5 (4)	(1)	(100)	(100)
NL	5 (4)	5 (4)	100 (100)	95 (100)	(100)
PL	(5)	(5)	(0)	(98)	(98)
PT	4 (4)	4 (4)	5 (100)	100 (100)	98 (100)
SE	(4)	(4)	(1)	(100)	(100)
SI	5 (4)	4 (5)	(0)	100 (98)	100 (98)
SK	4 (4)	5 (4)	(100)	100 (95)	98 (95)
IS	3	5		100	100
LI					
NO	3 (3)	5 (4)	(0)	95 (95)	95 (95)
BG	(4)	(4)			
RO	4 (4)	5 (4)	25 (25)	98 (98)	98 (98)
TR					

Sources: Col 1: 236MS Q7; Col 2: 236MS Q8; Col 3: 236MS Q13; Col 4: 236MS Q16; Col 5: 236MS Q19

Columns 1 and 2: Development of competition in the past and future 5 years in the domestic letter segment; 5 = Strong increase; 4 = Slight increase; 3 = No change; 2 = Slight decrease; 1 = Strong decrease; 0 = No opinion.

Column 3: Estimated percent of individual mailers which have a choice between at least two providers of letter post services;

Columns 4 and 5: Estimated accumulated market share (related to the concentration ratio - CR) of three major suppliers of the domestic and outgoing cross-border (cb) letter segments; figures provided in %.

#### Notes

First market share according to USP information. Value in parentheses according to NRA information.



**Table 2. Market structure indicators in the perception of USPs and NRAs, parcel and express services**

	(1) Last 5 yrs - parcels	(2) Future 5 yrs - parcels	(3) Last 5 yrs - express	(4) Future 5 yrs - express	(5) Choice (parcel)	(6) CR3 - dom parcel/expr.	(7) CR3 - cbo parcels	(8) CR3 - cbo express
AT	5 (4)	5 (4)	5 (3)	5 (4)	(-)			
BE	5 (4)	5 (5)	5 (5)	3 (5)	(100)	80 (70)	50 (60)	70 (70)
CY	3 (3)	5 (5)	5 (5)	5 (5)	(-)			
CZ	(3)	(4)	(4)	(4)	(-)	(100)	(98)	(60)
DE	(4)	(4)	(4)	(4)	(-)	(70)		
DK	4 (4)	4 (5)	4 (5)	4 (5)	(10)	95	70	80
EE	5 (3)	5 (3)	5 (5)	5 (3)	100 (1)	90 (100)	(100)	(80)
ES	5 (3)	0 (4)	5 (3)	0 (3)	100 (10)		70	70
FI	(4)		(4)	(4)	(100)	(80)		
FR	5 (5)	5 (5)	(5)	(4)	100 (100)			
GB					(-)			
GR	5 (3)	4 (3)	5 (5)	4 (5)	25 (1)	90 (60)	80 (100)	70 (70)
HU	5 (3)	5 (3)	5 (5)	5 (5)	75 (1)	90 (100)	70 (100)	90 (70)
IE	(5)	(5)	(3)	(4)	(1)			
IT	3 (4)	3 (4)	4 (4)	4 (4)	75 (-)	15	70	
LT	5 (5)	4 (5)	5 (5)	5 (5)	75 (-)	(95)	(98)	(98)
LU	5 (5)	5 (5)	5 (5)	5 (5)	100 (100)	60 (60)	50 (50)	80 (80)
LV	5 (5)	5 (4)	5 (5)	5 (4)	(-)	90 (100)	98 (100)	95 (80)
MT	5 (3)	4 (3)	4 (4)	4 (4)	100 (-)			
NL	5 (4)	4 (4)	3 (5)	3 (4)	100 (100)	(90)	(90)	(95)
PL	(5)	(5)	(5)	(5)	(100)	(90)	(98)	(90)
PT	5	5	5	5	100 (-)	40 (80)	60	60
SE	(4)	(4)	(4)	(4)	(1)	(98)	(95)	(80)
SI	5 (5)	5 (4)	5 (5)	5 (4)	100 (-)	80 (95)	90 (98)	80 (98)
SK	4 (5)	5 (5)	5 (5)	5 (5)	(100)	90 (90)	95 (95)	95 (80)
IS	5	3	0	0	100 (-)	95	95	98
LI					(-)			
NO	4 (4)	5 (4)	4 (4)	5 (4)	(-)	60 (98)	70 (95)	80 (90)
BG	(4)	(4)	(5)	(5)	(-)			
RO	5 (5)	5 (5)	5 (5)	4 (4)	100 (100)	80 (80)	80 (80)	
TR					(-)			

Sources: Col 1: 236MS Q9; Col 2: 236MS Q10; Col 3: 236MS Q11; Col 4: 236MS Q12; Col 5: 236MS Q14; Col 6: 236MS Q22; Col 7: 236MS Q25; Col 8: 236MS Q28

Columns 1 and 4: Development of competition in the past and future 5 years in the domestic parcel and express segments; 5 = Strong increase; 4 = Slight increase; 3 = No change; 2 = Slight decrease; 1 = Strong decrease; 0 = No opinion.

Column 5: Estimated percent of individual mailers which have a choice between at least two providers of parcel services;

Column 6: Estimated accumulated market share (related to the concentration ratio - CR) of three major suppliers of the domestic parcel/ express segment; figures provided in %.

Columns 7 and 8: Estimated accumulated market share (related to the concentration ratio - CR) of three major suppliers of the outgoing cross-border (cbo) parcel respective express segments; figures provided in %.

#### Notes

First market share according to USP information. Value in parentheses according to NRA information.

**Table 3. Perceived competition in all market segments, 2003 - USP (NRA)**

	(1) Dom letter mail	(2) Cb outbound letter mail	(3) Dom parcel mail	(4) Cb outbound parcel mail	(5) Dom express mail	(6) Cb outbound express mail	(7) Unaddressed mail
AT	1	2	3	3	3	3	2
BE	1 (1)	2 (3)	3 (2)	3 (2)	3 (3)	2 (3)	2 (3)
CY	0 (0)	0 (0)	2 (2)	2 (2)	2 (2)	2 (2)	2 (2)
CZ	(1)	(0)	(0)	(1)	(3)	(2)	(2)
DE	(1)	(1)	(2)	(2)	(2)	(2)	(2)
DK	1 (0)	1 (0)	3 (3)	3 (2)	2 (3)	3 (3)	3 (3)
EE	3 (0)	2 (0)	2 (0)	1 (0)	3 (3)	3 (2)	3
ES	2 (1)	3 (2)	3 (3)	3 (3)	3 (3)	3 (3)	3 (3)
FI	(0)	(0)					
FR	1 (1)	2 (1)	3 (2)	3 (2)	(2)	(2)	(1)
GB	1 (1)	2	3	3	3 (2)	3 (2)	3
GR	1	1	1	2	3	3	1
HU	2 (0)	1 (0)	3 (0)	3 (0)	2 (2)	3 (2)	3 (2)
IE	(0)	(2)	(2)	(2)	(2)	(2)	(2)
IT	2 (1)	1 (0)	3 (1)	3 (1)	3 (1)	3 (1)	3 (0)
LT	3 (1)	3 (1)	3 (3)	3 (3)	3 (3)	3 (3)	3 (3)
LU	1 (1)	1 (2)	3 (3)	3 (3)	3 (3)	3 (3)	3 (3)
LV	1 (0)	0	2 (0)	1 (0)	3 (2)	3 (3)	1 (2)
MT	1 (1)	1 (0)	2 (0)	3 (0)	2 (2)	3 (3)	3 (2)
NL	2 (1)	2 (1)	3 (3)	3 (3)	3 (3)	3 (2)	3 (2)
PL	(1)	(1)	(2)	(2)	(2)	(2)	(3)
PT	1 (1)	2 (0)	3	3	3	3	3 (3)
SE	(1)	(1)	(2)	(2)	(2)	(2)	(3)
SI	1 (1)	1 (1)	3 (2)	3 (3)	3 (2)	3 (2)	2 (2)
SK	1 (1)	1 (0)	2 (2)	1 (3)	3 (3)	3 (3)	3
IS	0	0	2	2	1	3	3
LI							
NO	0 (0)	0 (1)	2 (1)	2 (2)	1 (2)	1 (2)	2 (2)
BG							
RO	1 (1)	1 (1)	1 (1)	1 (1)	3 (3)	3 (3)	2 (2)
TR							

All columns: 0 = None; 1 = Emerging; 2 = Substantial; 3 = Intense.

**Notes**

First market share according to USP information. Value in parentheses according to NRA information.

**Table 4. Perceived competition in the domestic letter market, 1998-2003**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003
AT						1
BE	0 (1)	0 (1)	0 (1)	0 (1)	1 (1)	1 (1)
CY	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
CZ	(0)	(0)	(1)	(1)	(1)	(1)
DE	(0)	(1)	(1)	(1)	(1)	(1)
DK	1 (0)	1 (0)	1 (0)	1 (0)	1 (0)	1 (0)
EE	0	0	0	1	2 (0)	3 (0)
ES	2	2	2	2	2	2 (1)
FI	(0)	(0)	(0)	3 (0)	(0)	(0)
FR						1 (1)
GB	0 (0)	0 (0)	0 (0)	0 (0)	1 (0)	1 (1)
GR	0	0	0	0	0	1
HU	0 (0)	0 (0)	0 (0)	1 (0)	1 (0)	2 (0)
IE	(0)	(0)	(0)	(0)	(0)	(0)
IT	0 (1)	0 (1)	1 (1)	1 (1)	2 (1)	2 (1)
LT	1 (1)	1 (1)	2 (1)	2 (1)	3 (1)	3 (1)
LU	0 (0)	0 (0)	1 (1)	1 (1)	1 (1)	1 (1)
LV	1	1	1	1 (0)	1 (0)	1 (0)
MT	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (1)
NL	1 (0)	1 (0)	1 (0)	2 (1)	2 (1)	2 (1)
PL	(0)	(0)	(0)	(0)	(0)	(1)
PT	1 (1)	1 (1)	1 (1)	1 (1)	1 (1)	1 (1)
SE	(1)	(1)	(1)	(1)	(1)	(1)
SI	0	0	1	1	1 (1)	1 (1)
SK	1	1	1	1	1 (1)	1 (1)
IS	0	0	0	0	0	0
LI						
NO	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
BG						
RO	1 (1)	1 (1)	1 (1)	1 (1)	1 (1)	1 (1)
TR						

All columns: 0 = None; 1 = Emerging; 2 = Substantial; 3 = Intense.

**Notes**

First market share according to USP information. Value in parentheses according to NRA information.

**Table 5. Perceived competition in the domestic parcel market, 1998-2003**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003
AT			3	3	3	3
BE	0 (2)	1 (2)	1 (2)	2 (2)	3 (2)	3 (2)
CY	2 (2)	2 (2)	2 (2)	2 (2)	2 (2)	2 (2)
CZ	(0)	(0)	(0)	(0)	(0)	(0)
DE	(2)	(2)	(2)	(2)	(2)	(2)
DK	2 (3)	2 (3)	2 (3)	3 (3)	3 (3)	3 (3)
EE	1	1	1	1	2 (0)	2 (0)
ES	3	3	3	3	3	3 (3)
FI				3		
FR	2 (1)	2 (1)	2 (2)	2 (2)	3 (2)	3 (2)
GB	3	3	3	3	3	3
GR	0	0	0	1	1	1
HU	2 (0)	2 (0)	3 (0)	3 (0)	3 (0)	3 (0)
IE	(2)	(2)	(2)	(2)	(2)	(2)
IT	3 (1)	3 (1)	3 (1)	3 (1)	3 (1)	3 (1)
LT	1 (2)	1 (2)	2 (3)	2 (3)	3 (3)	3 (3)
LU	3 (3)	3 (3)	3 (3)	3 (3)	3 (3)	3 (3)
LV	1	1	2	2 (0)	2 (0)	2 (0)
MT	1 (0)	1 (0)	2 (0)	2 (0)	2 (0)	2 (0)
NL	3 (2)	3 (2)	3 (3)	3 (3)	3 (3)	3 (3)
PL	(1)	(1)	(1)	(2)	(2)	(2)
PT	3	3	3	3	3	3
SE	(2)	(2)	(2)	(2)	(2)	(2)
SI	1	1	2	2	3 (2)	3 (2)
SK	2	2	2	2	2 (2)	2 (2)
IS	1	1	2	2	2	2
LI						
NO	1 (1)	1 (1)	1 (1)	2 (1)	2 (1)	2 (1)
BG						
RO	1 (1)	1 (1)	1 (1)	1 (1)	1 (1)	1 (1)
TR						

All columns: 0 = None; 1 = Emerging; 2 = Substantial; 3 = Intense.

**Notes**

First market share according to USP information. Value in parentheses according to NRA information.

**Table 6. Perceived competition in the domestic express market, 1998-2003**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003
AT			3	3	3	3
BE	1 (3)	1 (3)	1 (3)	2 (3)	2 (3)	3 (3)
CY	2 (2)	2 (2)	2 (2)	2 (2)	2 (2)	2 (2)
CZ	(1)	(2)	(2)	(2)	(2)	(3)
DE	(2)	(2)	(2)	(2)	(2)	(2)
DK	2 (3)	2 (3)	1 (3)	2 (3)	2 (3)	2 (3)
EE					(2)	3 (3)
ES	1	2	3	3	3	3 (3)
FI				3		
FR						(2)
GB	3 (2)	2 (2)	3 (2)	3 (2)	3 (2)	3 (2)
GR	1	1	2	3	3	3
HU	2 (2)	2 (2)	2 (2)	2 (2)	2 (2)	2 (2)
IE	(2)	(2)	(2)	(2)	(2)	(2)
IT	3 (1)	3 (1)	3 (1)	3 (1)	3 (1)	3 (1)
LT	2 (3)	3 (3)	3 (3)	3 (3)	3 (3)	3 (3)
LU	3 (3)	3 (3)	3 (3)	3 (3)	3 (3)	3 (3)
LV	2	2	2	2 (2)	3 (2)	3 (2)
MT	2 (2)	2 (2)	(2)	(2)	(2)	2 (2)
NL	3 (3)	3 (3)	3 (3)	3 (3)	3 (3)	3 (3)
PL	(1)	(1)	(1)	(2)	(2)	(2)
PT	3	3	3	3	3	3
SE	(2)	(2)	(2)	(2)	(2)	(2)
SI	1	2	2	3	3 (2)	3 (2)
SK	3	3	3	3	3 (3)	3 (3)
IS	1	1	1	1	1	1
LI						
NO	1 (2)	1 (2)	1 (2)	1 (2)	1 (2)	1 (2)
BG						
RO	2 (2)	2 (2)	2 (2)	2 (2)	3 (3)	3 (3)
TR						

All columns: 0 = None; 1 = Emerging; 2 = Substantial; 3 = Intense.

**Notes**

First market share according to USP information. Value in parentheses according to NRA information.

**Table 7. Perceived competition in the unaddressed mail market, 1998-2003**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003
AT					2	2
BE	2 (3)	2 (3)	2 (3)	2 (3)	2 (3)	2 (3)
CY	1 (2)	2 (2)	2 (2)	2 (2)	2 (2)	2 (2)
CZ	(1)	(1)	(1)	(2)	(2)	(2)
DE	(2)	(2)	(2)	(2)	(2)	(2)
DK	2 (3)	2 (3)	2 (3)	2 (3)	3 (3)	3 (3)
EE	1	1	2	3	3	3
ES	3	3	3	3	3	3 (3)
FI				3		
FR	(3)	(3)	(3)	(3)	(3)	(1)
GB	2	2	2	3	2	3
GR	0	0	1	1	1	1
HU	2 (2)	2 (2)	2 (2)	3 (2)	3 (2)	3 (2)
IE	(2)	(2)	(2)	(2)	(2)	(2)
IT	3 (0)	3 (0)	3 (0)	3 (0)	3 (0)	3 (0)
LT	1 (3)	1 (3)	2 (3)	3 (3)	3 (3)	3 (3)
LU	3 (3)	3 (3)	3 (3)	3 (3)	3 (3)	3 (3)
LV	0	1	1	1 (1)	1 (1)	1 (2)
MT	2 (1)	2 (1)	2 (2)	3 (2)	3 (2)	3 (2)
NL	3 (3)	3 (3)	3 (2)	3 (2)	3 (2)	3 (2)
PL	(3)	(3)	(3)	(3)	(3)	(3)
PT	3 (3)	3 (3)	3 (3)	3 (3)	3 (3)	3 (3)
SE	(3)	(3)	(3)	(3)	(3)	(3)
SI	1	2	2	2	2 (2)	2 (2)
SK	3	3	3	3	3	3
IS	1	1	1	3	3	3
LI						
NO	2 (2)	2 (2)	2 (2)	2 (2)	2 (2)	2 (2)
BG						
RO			1 (1)	2 (2)	2 (2)	2 (2)
TR						

All columns: 0 = None; 1 = Emerging; 2 = Substantial; 3 = Intense.

**Notes**

First market share according to USP information. Value in parentheses according to NRA information.

**Table 8. Perceived competition in the outbound cross-border letter market, 1998-2003**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003
AT						2
BE	0 (1)	1 (1)	2 (2)	2 (2)	2 (2)	2 (3)
CY	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
CZ	(0)	(0)	(0)	(0)	(0)	(0)
DE	(0)	(0)	(0)	(0)	(0)	(1)
DK	1 (0)	1 (0)	1 (0)	1 (0)	1 (0)	1 (0)
EE	1	1	1	1	1 (0)	2 (0)
ES	1	1	2	2	3	3 (2)
FI	(0)	(0)	(0)	3 (0)	(0)	(0)
FR	1	1	1	2	2	2 (1)
GB	2	2	2	2	2	2
GR	0	0	0	1	1	1
HU	0 (0)	0 (0)	0 (0)	1 (0)	1 (0)	1 (0)
IE	(2)	(2)	(2)	(2)	(2)	(2)
IT	1 (0)	1 (0)	1 (0)	1 (0)	1 (0)	1 (0)
LT	1 (1)	1 (1)	2 (1)	2 (1)	3 (1)	3 (1)
LU	0 (0)	0 (0)	1 (1)	1 (1)	1 (1)	1 (2)
LV	0	0	0	0 (0)	0 (0)	0
MT	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (0)
NL	1 (0)	1 (1)	2 (1)	2 (1)	2 (1)	2 (1)
PL	(0)	(0)	(0)	(0)	(0)	(1)
PT	1 (0)	1 (0)	1 (0)	2 (0)	2 (0)	2 (0)
SE	(1)	(1)	(1)	(1)	(1)	(1)
SI	0	0	1	1	1 (1)	1 (1)
SK	1	1	1	1	1 (0)	1 (0)
IS	0	0	0	0	0	0
LI						
NO	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (1)
BG						
RO	1 (1)	1 (1)	1 (1)	1 (1)	1 (1)	1 (1)
TR						

All columns: 0 = None; 1 = Emerging; 2 = Substantial; 3 = Intense.

**Notes**

First market share according to USP information. Value in parentheses according to NRA information.

**Table 9. Perceived competition in the outbound cross-border parcel market, 1998-2003**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003
AT			3	3	3	3
BE	2 (2)	2 (2)	2 (2)	2 (2)	3 (2)	3 (2)
CY	2 (2)	2 (2)	2 (2)	2 (2)	2 (2)	2 (2)
CZ	(0)	(0)	(1)	(1)	(1)	(1)
DE	(2)	(2)	(2)	(2)	(2)	(2)
DK	2 (2)	2 (2)	2 (2)	3 (2)	3 (2)	3 (2)
EE	0	0	0	0	1 (0)	1 (0)
ES	1	1	3	3	3	3 (3)
FI				3		
FR	2 (1)	2 (1)	2 (2)	2 (2)	3 (2)	3 (2)
GB	2	3	3	3	3	3
GR	0	0	0	1	1	2
HU	2 (0)	2 (0)	2 (0)	3 (0)	3 (0)	3 (0)
IE	(1)	(2)	(2)	(2)	(2)	(2)
IT	3 (1)	3 (1)	3 (1)	3 (1)	3 (1)	3 (1)
LT	1 (3)	1 (3)	2 (3)	2 (3)	3 (3)	3 (3)
LU	3 (3)	3 (3)	3 (3)	3 (3)	3 (3)	3 (3)
LV	1	1	1	1 (0)	1 (0)	1 (0)
MT	3 (0)	3 (0)	3 (0)	3 (0)	3 (0)	3 (0)
NL	3 (2)	3 (2)	3 (2)	3	3 (3)	3 (3)
PL	(1)	(1)	(1)	(2)	(2)	(2)
PT	3	3	3	3	3	3
SE	(2)	(2)	(2)	(2)	(2)	(2)
SI	1	1	2	3	3 (3)	3 (3)
SK	1	1	0	1	1 (3)	1 (3)
IS	2	2	1	2	2	2
LI						
NO	1 (2)	1 (2)	1 (2)	1 (2)	2 (2)	2 (2)
BG						
RO	1 (1)	1 (1)	1 (1)	1 (1)	1 (1)	1 (1)
TR						

All columns: 0 = None; 1 = Emerging; 2 = Substantial; 3 = Intense.

**Notes**

First market share according to USP information. Value in parentheses according to NRA information.



**Table 10. Perceived competition in the outbound cross-border express market, 1998-2003**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003
AT			3	3	3	3
BE	1 (3)	2 (3)	2 (3)	2 (3)	2 (3)	2 (3)
CY	2 (2)	2 (2)	2 (2)	2 (2)	2 (2)	2 (2)
CZ	(1)	(1)	(2)	(2)	(2)	(2)
DE	(2)	(2)	(2)	(2)	(2)	(2)
DK	2 (3)	2 (3)	2 (3)	3 (3)	3 (3)	3 (3)
EE	3	3	3	3	3 (2)	3 (2)
ES	1	2	3	3	3	3 (3)
FI				3		
FR	(2)	(2)	(2)	(2)	(2)	(2)
GB	3 (2)	3 (2)	3 (2)	3 (2)	3 (2)	3 (2)
GR	1	2	2	2	3	3
HU	2 (2)	2 (2)	3 (2)	3 (2)	3 (2)	3 (2)
IE	(2)	(2)	(2)	(2)	(2)	(2)
IT	3 (1)	3 (1)	3 (1)	3 (1)	3 (1)	3 (1)
LT	3 (3)	3 (3)	3 (3)	3 (3)	3 (3)	3 (3)
LU	3 (3)	3 (3)	3 (3)	3 (3)	3 (3)	3 (3)
LV	1	2	2	2 (2)	3 (3)	3 (3)
MT	3 (3)	3 (3)	3 (3)	3 (3)	3 (3)	3 (3)
NL	3 (2)	3 (2)	3 (2)	3 (2)	3 (2)	3 (2)
PL	(1)	(1)	(1)	(2)	(2)	(2)
PT	3	3	3	3	3	3
SE	(2)	(2)	(2)	(2)	(2)	(2)
SI	1	2	2	3	3 (2)	3 (2)
SK	3	3	3	2	2 (3)	3 (3)
IS	3	3	2	2	3	3
LI						
NO	1 (2)	1 (2)	1 (2)	1 (2)	1 (2)	1 (2)
BG						
RO	3 (3)	3 (3)	3 (3)	3 (3)	3 (3)	3 (3)
TR						

All columns: 0 = None; 1 = Emerging; 2 = Substantial; 3 = Intense.

**Notes**

First market share according to USP information. Value in parentheses according to NRA information.



### **1.3 Business strategies**

**Table 11. Legal status and ownership of USPs in 2003**

	(1) USP	(2) Status	(3) Government ownership
AT	Österreichische Post AG	Plc	100%
BE	De Post/La Poste	Plc	100%
CY	Cyprus Post	Gov dpt	100%
CZ	Czech Post	State enterp	100%
DE	Deutsche Post AG	Plc	62%
DK	Post Denmark	Plc	100%
EE	Eesti Post Ltd	Plc	100%
ES	Sociedad Estatal Correos y Telegrafos, S.A.	State enterp	100%
FI	Finland Post Corporation	Plc	100%
FR	La Poste	State enterp	100%
GB	Royal Mail Ltd	Plc	100%
GR	Hellenic Post (ELTA)	State enterp	100%
HU	Hungarian Post Office Ltd.	Plc	100%
IE	An Post	Plc	100%
IT	Poste Italiane s.p.a.	Plc	100%
LT	Lietuvos Pastas	State enterp	100%
LU	Entreprise des Postes et Télécommunications (EPT)	State enterp	100%
LV	Latvia Post	State enterp	100%
MT	Maltapost plc	Plc	65%
NL	TPG	Plc	35%
PL	State Enterprise of Public Utility Poczta Polska	State enterp	100%
PT	CTT - Correios de Portugal, S.A.	Plc	100%
SE	Posten AB	Plc	100%
SI	Posta Slovenije d.o.o.	Plc	100%
SK	Slovenska pošta, s.p. Banska Bystrica	State enterp	100%
IS			
LI	Liechtensteinische Post		
NO	Norway Post	Plc	100%
BG	Bulgarian Posts plc	Plc	100%
RO	Compania Nationala Posta Romana S.A.	State enterp	100%
TR			

Sources: Col 1: 211RF Q2; Col 2: 211RF Q3; Col 3: 211RF Q4

Column 2: Gov dpt = Government department; State enterp = State enterprise; Plc = Public limited company; Other = (see Notes below).

**Notes**

**Table 12. USP business lines, 1998-2003**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003
AT						ABCD
BE	ABCDFJL	ABCDFJL	ABCDFJL	ABCDFJL	ABCDFIJLN	ABCDFIJLN
CY	ABCDGJ	ABCDJ	ABCDJ	ABCDJ	ABCDJ	ABCDJ
CZ						
DE						
DK	ABDJ	ABDJ	ABJN	ABJN	ABJN	ABJN
EE						
ES	ABCDFG	ABCDFG	ABCDFGHIJL	ABCDFGHIJL	ABCDFGHIJKL	ABCDFGHIJKL
FI						
FR	ABCDEFGHIJKL	ABCDEFGHIJKL	ABCDEFGHIJKL	ABCDEFGHIJKL	ABCDEFGHIJKL	ABCDEFGHIJKL
GB	ABCDE	ABCDE	ABCDE	ABCDE	ABCDE	ABCDE
GR	ABCDFG	ABCDFGJ	ABCDFGJ	ABDFGJ	ABDFGJ	ABDFGJ
HU	AB	AB	AB	AB	AB	AB
IE	ABCFHJKLO	ABCFHJKLO	ABCFHJKLO	ABCFHJKLNO	ABCFHJKLNO	ABCFHJKLNO
IT	ABCF	ABCF	ABCDFGJ	ABCDFGJ	ABCDFGJ	ABCDFGJ
LT	ABCDGJL	ABCDGJL	ABCDGJL	ABCDGJL	ABCDGJL	ABCDGJL
LU	ABCDFGKM	ABCDFGKM	ABCDFGKM	ABDFGKM	ABDFGKM	ABDFGKM
LV	ABCDGO	ABCDGLO	ABCDGKLO	ABCDGKLO	ABCDGKLO	ABCDGKLO
MT	ABCGJN	ABCGIJN	ABCGIJN	ABCGIJKN	ABCDGIJKN	ABCDGIJLMN
NL	ABCDHIJKLMNO	ABCDHIJKLMNO	ABCDHIJKLMNO	ABCDHIJKLMNO	ABCDHIJKLMNO	ABCDHIJKLMNO
PL	ABCDGJ	ABCDGJ	ABCDGJ	ABCDGJ	ABCDGJ	ABCDGJ
PT	ABCDGIJLP	ABCDGIJKLP	ABCDGIJLMOP	ABCDGIJLMNO	ABCDGIJLMNO	ABCDGIJLMNO
SE						
SI	ABCDFGIJL	ABCDFGIJL	ABCDFGIJL	ABCDFGIJL	ABCDEFIJLO	ABCDFGIJLMO
SK	ABCDFGJ	ABCDFGJ	ABCDFGJ	ABCDFGJL	ABCDFGJL	ABCDFGJL
IS	ABCDGL	ABCDGL	ABCDGL	ABCDGL	ABCDGL	ABCDG
LI						
NO	ABDEFI	ABDEFI	ABDEFI	ABDEFI	ABCDEFIJL	ABCDEFIJLN
BG						
RO	AF	AB	AG	AC	AC	AC
TR						

Sources: 311UP Q5

All columns: A = Letter post; B = Parcels; C = Express; D = Unaddr delivery; E = Freight; F = Post bank; G = Finance; H = Printing; I = Mail prep; J = Retail; K = Internet; L = Hybrid mail, M = E-mail services, N = Mailroom management, O = Advertising, P = Other activities (see notes).

**Notes**



## **1.4 Demand structure and development**

**Table 13. Demand structure, letter post, expected future development**

	(1) Expect fut development % Sent by Private (USP)	(2) Expect fut development % Sent by Private (NRA)	(3) Expect fut development % Received by Private (USP)	(4) Expect fut development % Received by Private (NRA)
AT		Strong decrease		Strong decrease
BE	Slight decrease	Strong decrease	Slight increase	Slight decrease
CY	No opinion	No opinion	No opinion	No opinion
CZ		No opinion		No opinion
DE		Slight decrease		Slight increase
DK	Slight decrease	Slight decrease	Slight decrease	Strong decrease
EE	Slight decrease	Slight decrease	Slight increase	Slight increase
ES	No opinion	No change	No opinion	
FI		Slight decrease		
FR	Slight decrease	Slight decrease	Strong increase	Slight increase
GB				
GR	Slight increase	No opinion	Strong increase	No opinion
HU	Slight decrease	Slight decrease	Slight decrease	Slight increase
IE		Slight decrease		Slight increase
IT	Strong decrease	No opinion	Slight increase	No opinion
LT	No change	No change	No opinion	Slight increase
LU	Slight decrease	Slight decrease	Slight increase	Slight decrease
LV	Slight increase	No change	Slight increase	Slight increase
MT	Slight decrease	Slight decrease	Strong increase	Slight increase
NL	Slight decrease	No change	Strong decrease	Slight decrease
PL		Strong decrease		No opinion
PT	Strong decrease	No opinion	Slight increase	No opinion
SE		No opinion		No opinion
SI	Slight decrease	No change	Slight decrease	Slight increase
SK	Slight decrease	Slight decrease	Strong increase	Slight increase
IS	No change		Slight decrease	
LI				
NO	Strong decrease		Strong decrease	
BG		No change		Slight increase
RO			No opinion	
TR				

Sources: Col 1: 237DS Q1008; Col 2: 237DS Q1008; Col 3: 237DS Q9; Col 4: 237DS Q9

Column 1: USP's expectation for the future development of the share of letter post sent by households/private customers

Column 2: NRA's expectation for the future development of the share of letter post sent by households/private customers

Column 3: USP's expectation for the future development of the share of letter post sent by businesses

Column 4: NRA's expectation for the future development of the share of letter post sent by businesses

#### Notes



**Table 14. Expected volume development, letter post, 2004-2009**

	(1) Letter post (all)	(2) Correspondence	(3) Direct mail
AT	Decrease<2% (Decrease>2% )	Decrease<2% (Increase<2% )	Increase<2% (Increase<2% )
BE	Decrease>2% (Decrease>2% )	Decrease>2% (Decrease>2% )	Increase>2% (No change )
CY	Decrease<2% (Decrease<2% )	Decrease<2% (Decrease<2% )	Increase<2% (Increase<2% )
CZ	(Increase<2% )	(No change )	(Increase>2% )
DE	(Increase<2% )	(Decrease<2% )	(Increase>2% )
DK	Decrease>2% (Decrease>2% )	Decrease>2% (Decrease>2% )	Increase<2% (Increase>2% )
EE	Decrease<2% (Increase<2% )	Increase<2% (Increase>2% )	Increase<2% (Increase>2% )
ES	(No change )	(Increase<2% )	
FI	(No change )	(Decrease<2% )	(Increase<2% )
FR	Decrease<2% (Decrease<2% )	Decrease>2% (Decrease<2% )	Increase<2% (Increase<2% )
GB			
GR	Increase<2%	Increase>2%	Increase<2%
HU	Decrease>2% (No change )	Decrease>2% (Decrease<2% )	Increase>2% (Increase<2% )
IE	(Increase>2% )	(Decrease>2% )	(Increase>2% )
IT	Increase<2% (Increase<2% )	Increase<2% (No change )	Increase>2% (Increase<2% )
LT	Increase>2% (Increase<2% )	(Increase<2% )	(Increase>2% )
LU	Decrease<2% (Decrease<2% )	Decrease<2% (Decrease<2% )	Increase<2% (Increase<2% )
LV	Increase<2% (Increase<2% )	Decrease<2% (Increase>2% )	Increase>2%
MT	Decrease<2% (Increase<2% )	Decrease>2% (Decrease<2% )	Increase>2% (Increase>2% )
NL	Decrease>2% (No change )	(Decrease<2% )	(Increase<2% )
PL	(Increase>2% )	(Increase>2% )	(Increase<2% )
PT	Decrease>2% (Decrease<2% )	Decrease>2% (Decrease>2% )	Increase>2% (Increase>2% )
SE	(No change )	(Decrease<2% )	(Increase<2% )
SI	Decrease<2% (Increase>2% )	Decrease<2% (Increase>2% )	Increase>2% (Increase>2% )
SK	Increase>2% (Decrease<2% )	Increase>2% (Decrease<2% )	Increase>2% (Increase>2% )
IS	Decrease>2%	Increase<2%	Increase>2%
LI			
NO	Decrease>2% (No change )	Decrease>2% (Decrease<2% )	Increase<2% (Increase<2% )
BG	(Increase<2% )	(Increase<2% )	(Increase<2% )
RO	Decrease<2% (Decrease<2% )	Decrease<2% (Decrease<2% )	Increase<2% (Increase<2% )
TR			

Sources: Col 1: 237DS Q1; Col 2: 237DS Q2; Col 3: 237DS Q3

All columns: Increase>2% = Strong increase (annual growth >2%); Increase<2% = Slight increase (annual growth <2%); No change = No change; Decrease<2% = Slight decrease (annual decrease <2%); Decrease>2% = Strong decrease (annual decrease >2%).

**WIK Notes**

First market share according to USP information. Value in parentheses according to NRA information.

**Table 15. Factors influencing letter mail volumes in the next 5 years**

	(1) P2X - NRAs' view	(2) P2X - USPs' view	(3) B2X - NRAs' view	(4) B2X - USPs' view	(5) Direct mail - NRAs' view	(6) Direct mail - USPs' view
AT	E-sub		E-sub		GDP	
BE	E-sub	E-sub	E-sub	E-sub	E-sub	GDP
CY	E-sub	E-sub	E-sub	E-sub	E-sub	E-sub
CZ	E-sub		GDP		GDP	
DE	E-sub		GDP		GDP	
DK	E-sub	E-sub	E-sub	E-sub	GDP	E-sub
EE	GDP	E-sub	E-sub	E-sub	GDP	GDP
ES	E-sub	GDP	GDP	E-sub	GDP	GDP
FI	E-sub		E-sub		GDP	
FR	E-sub	E-sub	GDP	GDP	GDP	GDP
GB						
GR		E-sub		GDP		GDP
HU	E-sub	E-sub	GDP	E-sub	GDP	E-sub
IE	Other		Other		Other	
IT	E-sub	E-sub	GDP	GDP	GDP	GDP
LT	E-sub	GDP	GDP	GDP	GDP	GDP
LU	E-sub	E-sub	E-sub	E-sub	GDP	GDP
LV	E-sub	E-sub	E-sub	GDP	GDP	GDP
MT	E-sub	E-sub	E-sub	E-sub	E-sub	GDP
NL	GDP	E-sub	E-sub	E-sub	GDP	GDP
PL	GDP		GDP		GDP	
PT	E-sub	E-sub	E-sub	E-sub	Other	GDP
SE						
SI	E-sub	E-sub	GDP	E-sub	GDP	GDP
SK	GDP	GDP	E-sub	GDP	GDP	GDP
IS		E-sub		E-sub		GDP
LI						
NO	E-sub	E-sub	E-sub	E-sub	GDP	GDP
BG	GDP		GDP		GDP	
RO	E-sub	E-sub	E-sub	E-sub	GDP	GDP
TR						

All Columns: GDP = Overall economic growth; E-sub = Electronic substitution; Other = (see Notes below).

**Notes**

**Table 16. Future development of postal services in 5 and 10 years (in %)**

	(1) Letters - 5 years	(2) Letters - 10 years	(3) Direct mail - 5 years	(4) Direct mail - 10 years	(5) Parcels - 5 years	(6) Parcels - 10 years
AT	(-15)	(-20)	(20)	(15)	(15)	(20)
BE	-20 (-15)	-40 (-20)	8 (0)	15 (0)	15 (4)	20 (15)
CY						
CZ	(4)	(30)	(20)	(40)	(4)	(8)
DE	(-4)	(-8)	(15)	(30)	(8)	(15)
DK	-20 (-15)	-40 (-20)	8 (4)	(8)	30 (4)	(8)
EE	(0)	(-8)	(40)	(20)	(-8)	(-15)
ES						
FI	(-15)	(-40)	(4)	(4)	(4)	(8)
FR	-8 (-8)				20	30
GB	8 (0)	15 (0)	30 (0)	50 (0)	(0)	(0)
GR	30	50				
HU	4 (0)	-4 (-8)	4 (4)	8 (0)	4 (8)	8 (0)
IE	4	0	8	8	0	-4
IT	0 (-8)	-15 (-15)	4 (0)	15 (0)	-8 (4)	-4 (8)
LT	50 (-20)	(-50)	100 (30)	(50)	-8 (30)	(50)
LU	-8	-15 (-40)	4 (30)	8 (40)	8 (8)	15 (4)
LV	0 (0)	-8 (-8)	15	15	20 (15)	40 (20)
MT	-8 (-8)	-20 (-20)	4 (4)	8 (8)	4 (4)	8 (15)
NL	-15 (-4)	-20 (-8)	(4)	(-15)	(4)	(20)
PL	(20)	(30)	(15)	(20)	(15)	(20)
PT	-15 (-8)		15 (20)		8	
SE	(-4)	(-8)	(4)	(8)	(4)	(8)
SI	4 (30)	0 (40)	20 (75)	20 (75)	75 (30)	75 (40)
SK	20 (-4)	30 (-8)	40 (30)	50 (30)	15 (8)	20 (15)
IS	-8	-20	30	40	20	30
LI						
NO	-20 (4)	-40 (0)	8 (4)	15 (15)	8 (15)	20 (20)
BG						
RO	-15 (-15)	-40 (-40)	50 (50)	100 (100)	15 (15)	30 (30)
TR						

Sources: Col 1: 221FD Q14; Col 2: 221FD Q15; Col 3: 221FD Q18; Col 4: 221FD Q19; Col 5: 221FD Q24; Col 6: 221FD Q25

**Notes**

First market share according to USP information. Value in parentheses according to NRA information.

**Table 17. Future role of postal services**

	(1) Normal business in the next 5 years?	(2) Postal services as means of communication	(3) Postal services as means of distribution
AT	Y (N)	(4)	(4)
BE	Y (Y)	1 (2)	4 (4)
CY	Y (Y)	2 (2)	5 (5)
CZ	(Y)	(4)	(4)
DE	(Y)	(2)	(4)
DK	Y	3 (2)	3 (4)
EE	(Y)	(3)	(4)
ES	C	0	0
FI	(Y)	(2)	(4)
FR	Y (Y)	2 (2)	4 (4)
GB	(Y)	(4)	(4)
GR	N (Y)	4 (3)	5 (0)
HU	Y (Y)	4 (3)	5 (4)
IE	Y (Y)	3 (2)	3 (5)
IT	Y (Y)	2 (1)	4 (4)
LT	Y (Y)	4 (4)	4 (4)
LU	Y (Y)	2 (2)	4 (1)
LV	Y (Y)	2 (4)	5 (4)
MT	N (Y)	2 (2)	5 (4)
NL	Y (Y)	1 (2)	2 (2)
PL	(Y)	(4)	(4)
PT	Y (C)	2 (2)	4 (4)
SE	(Y)	(0)	(0)
SI	Y (Y)	2 (2)	5 (4)
SK	Y (Y)	4 (3)	5 (4)
IS	Y	2	4
LI			
NO	Y (Y)	(2)	(4)
BG	(Y)	(4)	(4)
RO	Y (Y)	4 (4)	4 (4)
TR			

Sources: Col 1: 221FD Q26; Col 2: 221FD Q27; Col 3: 221FD Q28

Column 2 and 3: Development of the importance of postal services as means of communication or distribution; 5 = Strong increase; 4 = Slight increase; 3 = No change; 2 = Slight decrease; 1 = Strong decrease; 0 = No opinion.

#### Notes

First market share according to USP information. Value in parentheses according to NRA information.

**Table 18. Past and future importance of postal services**

	(1) Letter services - past	(2) Letter services - future	(3) Direct mail - past	(4) Direct mail - future	(5) Parcel services - past	(6) Parcel services - future
AT	(3)	(2)	(4)	4 (4)	(4)	(4)
BE	2 (2)	1 (1)	4 (0)	4 (3)	4 (0)	4 (4)
CY	0 (0)	0 (0)	4 (4)	5 (5)	3 (3)	5 (5)
CZ	(3)	(3)	(5)	(5)	(3)	(3)
DE	(3)	(3)	(4)	(2)	(4)	(4)
DK	3 (3)	3 (2)	4 (4)	4 (4)	3 (3)	3 (4)
EE	4 (4)	2 (4)	4 (5)	4 (5)	2 (4)	2 (4)
ES	0	0	0	0	0	0
FI	(2)	(2)	(4)	(3)	(4)	(4)
FR	2 (2)	2 (2)	4 (4)	4 (5)	4 (4)	5 (5)
GB	2 (4)	2 (3)	5 (4)	5 (4)	(4)	(4)
GR	4 (5)	5	5 (1)	5	4 (1)	0
HU	3 (3)	2 (3)	5 (4)	5 (4)	2 (3)	4 (4)
IE	4 (1)	4 (2)	4 (5)	4 (5)	1 (5)	2 (5)
IT	2 (4)	2 (4)	4 (3)	5 (3)	1 (4)	2 (4)
LT	5 (4)	4 (2)	5 (4)	5 (4)	2 (3)	3 (2)
LU	3 (3)	2 (1)	4 (3)	4 (4)	4 (3)	4 (4)
LV	3 (4)	3 (3)	5 (0)	4 (0)	5 (5)	5 (4)
MT	4 (4)	2 (2)	5 (5)	5 (4)	3 (3)	5 (4)
NL	2 (3)	1 (2)	2 (2)	2 (2)	3 (3)	4 (2)
PL	(4)	(4)	(5)	(5)	(4)	(4)
PT	2 (2)	1 (2)	4 (4)	4 (5)	2 (2)	4 (3)
SE	(0)	(0)	(0)	(0)	(0)	(0)
SI	4 (5)	2 (4)	5 (5)	4 (5)	4 (4)	5 (4)
SK	4 (2)	4 (2)	5 (4)	5 (4)	2 (4)	5 (4)
IS	2	2	5	4	5	4
LI						
NO	0 (2)	0 (2)	0 (0)	0 (0)	4 (3)	4 (4)
BG	(5)	(4)	(0)	(4)	(4)	(4)
RO	2 (2)	2 (2)	4	5 (4)	4 (4)	4 (4)
TR						

Sources: Col 1: 221FD Q12; Col 2: 221FD Q13; Col 3: 221FD Q16; Col 4: 221FD Q17; Col 5: 221FD Q22; Col 6: 221FD Q23

All columns: 5 = Strong increase; 4 = Slight increase; 3 = No change; 2 = Slight decrease; 1 = Strong decrease; 0 = No opinion.

#### Notes

First market share according to USP information. Value in parentheses according to NRA information.



## **2 USP development**

### **2.1 Overall situation of USPs**

**Table 19. USP total revenues, EUR million, 1998-2003**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003	(7) CAGR
AT		1,542	1,799	1,635	1,629		
BE							
CY	19	20	22	26	26		
CZ	457	657	496	432	504		
DE	14,669	22,363	32,708	33,379	39,255	40,017	22.2%
DK							
EE	32	36	34	39	40	45	7.0%
ES	1,407	1,268	1,383	1,565	1,769	2,011	7.4%
FI							
FR	14,225	15,315	16,020	17,028	17,332		
GB		10,629	12,334	13,048	13,370	12	
GR	285	340	367	396	447		
HU	341	362	401	459	541	791	18.3%
IE			573	625	684	709	
IT	6,007	6,387	6,846	7,216	7,391		
LT	27	33	39	40	41	44	10.0%
LU	394	401	420	457	473		
LV	24	31	39	39	40	38	9.9%
MT		19	16	17	16	16	
NL	7,409	8,536	9,936	11,218	11,782		
PL	918	1,003	1,186	1,419	1,424		
PT	563	594	629	688	704	732	5.4%
SE							
SI	123	137	141	155	163	170	6.7%
SK	97	110	122	140	141		
IS	36	42	40	45	47	46	5.1%
LI							
NO	1,361	1,578	1,682	1,864	2,009	1,943	7.4%
BG	34	40	48	48	53		
RO	102	114	128	130	145	139	6.4%
TR	302	440	561	417	389		

Sources: 311UP Q6

Column 7: CAGR - compound annual growth rate for six year period (1998-2003)

**Notes**



## **2.2 Mail volumes**

**Table 20. USP domestic letter post volume, million items, 1998-2002**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003	(7) CAGR 1998- 2002	(8) CAGR 1998- 2003
AT					888			
BE								
CY	40	42	50	54	52		6.8%	
CZ								
DE								
DK								
EE	57	56	57	60	68		4.5%	
ES	4,365	4,813	4,921	4,960	5,125		4.1%	
FI	1,652	1,671	1,666	1,597	1,501		-2.4%	
FR								
GB								
GR	408	433	459	476	496		5.0%	
HU	533	758	784	850	888		13.6%	
IE	556	580	588	637	673		4.9%	
IT	6,362	6,272	6,212	6,361	5,973		-1.6%	
LT	31	32	32	35	40		6.8%	
LU	106	106	108	108	106		-0.1%	
LV	49		69	82	85		14.7%	
MT		45	46	48	52			
NL	7,009	7,003	7,022	7,119	6,871		-0.5%	
PL	2,090	2,011	1,597	1,767	1,659		-5.6%	
PT	1,100	1,161	1,201	1,251	1,201		2.2%	
SE								
SI	322	347	370	369	373		3.8%	
SK			299	324	236			
IS	55	56	68	67	64		3.6%	
LI								
NO				1,451	1,409			
BG	72	67	75	62	71		-0.5%	
TR	948	986	967	807	903		-1.2%	

Sources: 323VO Q1

**Notes**

2003: This figure is confidential in some member states.

RO: confidential.

AT: items of correspondence.

**Table 21. USP domestic letter post volume per capita, 1998-2002**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003
AT					110.4	
BE						
CY	59.4	61.4	71.8	76.9	74.1	
CZ						
DE						
DK						
EE	41.0	40.7	41.4	44.2	50.1	
ES	110.8	121.8	123.9	123.6	126.8	
FI	320.9	323.9	322.2	308.2	288.8	
FR						
GB						
GR	38.8	41.1	43.5	45.1	47.0	
HU	51.9	73.9	76.7	83.3	87.3	
IE	150.5	155.3	155.7	166.5	172.6	
IT	110.5	108.9	107.7	110.0	103.3	
LT	8.6	8.9	9.2	10.1	11.5	
LU	250.4	247.9	247.4	245.7	237.6	
LV	20.1		29.2	34.8	36.4	
MT		117.7	120.6	121.9	131.5	
NL	447.7	444.3	442.6	445.3	426.6	
PL	54.1	52.0	41.3	45.7	42.9	
PT	108.8	114.4	117.8	121.9	116.3	
SE						
SI	162.0	175.4	186.0	185.2	187.0	
SK			55.4	60.3	43.9	
IS	202.8	204.5	242.7	234.9	222.2	
LI						
NO				322.2	311.4	
BG	8.7	8.2	9.1	7.8	9.0	
TR						

Sources: 323VO Q1

**Notes**

2003: This figure is confidential in some member states.

RO: confidential.

AT: items of correspondence.

**Table 22. USP domestic letter post volume per 1,000 EUR GDP, 1998-2002**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003
AT					4.1	
BE						
CY	4.9	4.8	5.2	5.3	4.9	
CZ						
DE						
DK						
EE	12.2	11.5	10.2	9.7	9.9	
ES	8.3	8.5	8.1	7.6	7.4	
FI	14.3	13.9	12.8	11.8	10.7	
FR						
GB						
GR	3.7	3.7	3.7	3.6	3.5	
HU	12.7	16.8	15.5	14.7	12.9	
IE	7.2	6.5	5.7	5.6	5.2	
IT	6.0	5.7	5.3	5.2	4.7	
LT	3.2	3.2	2.7	2.7	2.7	
LU	6.3	5.7	5.1	4.9	4.7	
LV	9.1		8.9	9.6	9.6	
MT		12.0	11.1	11.0	11.8	
NL	19.9	18.7	17.5	16.6	15.5	
PL	13.9	13.0	8.8	8.5	8.2	
PT	11.0	10.7	10.4	10.2	9.3	
SE						
SI	17.5	17.6	18.1	17.0	16.0	
SK			13.6	13.9	9.2	
IS	7.7	7.1	7.4	7.8	7.0	
LI						
NO				7.6	7.0	
BG	6.3	5.5	5.5	4.0	4.3	
TR	5.3	5.7	4.5	5.0	4.7	

Sources: 323VO Q1

**Notes**

2003: This figure is confidential in some member states.

RO: confidential.

AT: items of correspondence.

## **2.3 Price performance**

**Table 23. USP tariffs for 20g letters of fastest standards category, EUR**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003	(7) CAGR
AT	0.51	0.51	0.51	0.51	0.51	0.55	1.5%
BE	0.42	0.42	0.42	0.42	0.42	0.49	3.1%
CY	0.26	0.26	0.26	0.35	0.35	0.34	5.8%
CZ	0.13	0.12	0.15	0.16	0.21	0.25	13.8%
DE	0.56	0.56	0.56	0.56	0.56	0.55	-0.4%
DK	0.50	0.54	0.54	0.54	0.54	0.57	2.6%
EE	0.23	0.23	0.28	0.28	0.28	0.28	4.1%
ES	0.27	0.27	0.27	0.27	0.34	0.34	4.7%
FI	0.50	0.50	0.59	0.61	0.60	0.65	5.2%
FR	0.46	0.46	0.46	0.46	0.46	0.50	1.7%
GB	0.37	0.39	0.44	0.43	0.43	0.40	1.7%
GR	0.30	0.37	0.39	0.41	0.45	0.47	9.1%
HU	0.09	0.11	0.11	0.12	0.14	0.16	11.6%
IE	0.41	0.38	0.38	0.38	0.41	0.48	3.4%
IT	0.62	0.62	0.62	0.62	0.62	0.62	0.0%
LT	0.15	0.16	0.27	0.28	0.29	0.29	14.2%
LU	0.39	0.40	0.45	0.45	0.45	0.50	4.8%
LV	0.15	0.24	0.27	0.27	0.26	0.23	9.1%
MT	0.14	0.14	0.15	0.15	0.17	0.15	2.3%
NL	0.36	0.36	0.36	0.39	0.39	0.39	1.5%
PL		0.17	0.20	0.27	0.47	0.41	
PT	0.40	0.40	0.42	0.42	0.43	0.43	1.5%
SE						0.60	
SI	0.07	0.08	0.09	0.11	0.13	0.19	20.1%
SK	0.26	0.27	0.29	0.30	0.30	0.29	2.3%
IS	0.43	0.45	0.55	0.48	0.52	0.52	3.9%
LI						0.66	
NO	0.42	0.48	0.52	0.68	0.73	0.69	10.2%
BG						0.23	
RO	0.07	0.09	0.10	0.10	0.09	0.10	9.0%
TR						0.17	

Sources: 322PR Q2

Column 7: CAGR - average annual tariff increase (1998-2003)

**Notes**

Tariffs in national currency converted to EUR using average annual exchange rates.

**Table 24. USP tariffs for 20g letters of fastest standards category, PPS**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003	(7) CAGR
AT	0.49	0.50	0.51	0.50	0.50	0.54	1.9%
BE	0.41	0.41	0.42	0.43	0.43	0.50	4.0%
CY	0.32	0.33	0.33	0.44	0.42	0.39	3.8%
CZ	0.30	0.30	0.35	0.34	0.40	0.52	11.8%
DE	0.50	0.51	0.52	0.52	0.52	0.52	0.8%
DK	0.40	0.44	0.44	0.44	0.43	0.45	2.6%
EE	0.50	0.49	0.59	0.55	0.53	0.54	1.9%
ES	0.33	0.34	0.33	0.33	0.41	0.39	3.2%
FI	0.47	0.47	0.55	0.56	0.55	0.59	4.8%
FR	0.45	0.45	0.46	0.46	0.47	0.49	1.8%
GB	0.37	0.37	0.39	0.39	0.40	0.39	0.9%
GR	0.41	0.50	0.52	0.54	0.59	0.56	6.2%
HU	0.23	0.25	0.25	0.26	0.26	0.31	6.8%
IE	0.42	0.38	0.37	0.35	0.37	0.42	0.0%
IT	0.70	0.70	0.70	0.69	0.68	0.69	-0.3%
LT	0.41	0.42	0.62	0.64	0.64	0.66	10.0%
LU	0.35	0.37	0.41	0.41	0.41	0.45	4.8%
LV	0.41	0.59	0.58	0.57	0.57	0.57	7.2%
MT	0.22	0.22	0.23	0.22	0.26	0.26	2.6%
NL	0.36	0.36	0.36	0.38	0.38	0.37	0.7%
PL		0.37	0.40	0.49	0.88	0.88	
PT	0.56	0.56	0.59	0.58	0.59	0.55	-0.3%
SE						0.50	
SI	0.11	0.12	0.13	0.17	0.19	0.28	21.5%
SK	0.67	0.70	0.72	0.73	0.72	0.67	-0.1%
IS	0.40	0.40	0.44	0.43	0.44	0.44	1.8%
LI						0.48	
NO	0.37	0.40	0.43	0.55	0.54	0.54	8.0%
BG						0.64	
RO	0.25	0.31	0.29	0.27	0.27	0.31	4.2%
TR						0.33	

Sources: 322PR Q2

Column 7: CAGR - average annual increase of tariff expressed in PPS(1998-2003)

**Notes**

Tariffs in national currency converted to PPS using Eurostat's Purchasing Power Parities. 1 Purchasing power standard (PPS) equals the average purchasing power within the Eurozone. For notes to tariff information see table on tariffs in EUR above.

**Table 25. Selected tariffs for domestic correspondence of fastest standard category in EUR and PPS, 2003**

	(1) 50g FSC tariff, EUR, 2003	(2) 100g FSC tariff, EUR, 2003	(3) 350g FSC tariff, EUR, 2003	(4) 50g FSC tariff, PPS, 2003	(5) 100g FSC tariff, PPS, 2003	(6) 350g FSC tariff, PPS, 2003
AT	1.00	1.25	1.75	0.98	1.23	1.72
BE	0.98	1.47	2.45	0.99	1.49	2.49
CY	0.43	0.51	0.09	0.49	0.59	0.10
CZ	0.38	0.38	0.50	0.78	0.78	1.04
DE	1.44	1.44	1.44	1.37	1.37	1.37
DK	0.87	1.61	2.69	0.69	1.27	2.12
EE	0.34	0.45	0.67	0.66	0.88	1.30
ES	0.54	0.84	3.12	0.62	0.96	3.56
FI	0.90	1.30	2.40	0.82	1.18	2.19
FR	1.11	1.90	2.65	1.09	1.86	2.59
GB	0.40	0.87	1.98	0.39	0.83	1.90
GR	0.88	1.40	2.12	1.05	1.67	2.52
HU	0.26	0.37	0.47	0.51	0.74	0.93
IE	0.48	0.96	1.44	0.42	0.84	1.26
IT	1.24	1.86	4.96	1.37	2.06	5.50
LT	0.41	0.67	1.16	0.93	1.53	2.65
LU	1.00	1.40	1.60	0.89	1.25	1.42
LV	0.39	0.62	0.70	0.96	1.53	1.72
MT	0.24	0.32	0.67	0.40	0.55	1.13
NL	1.17	1.56	2.25	1.12	1.49	2.15
PL	0.48	0.52	0.61	1.03	1.12	1.32
PT	0.60	1.45	2.66	0.77	1.86	3.41
SE	1.21	2.41	3.62	1.00	2.01	3.01
SI	0.32	0.76	1.77	0.48	1.15	2.68
SK	0.39	0.39	0.39	0.89	0.89	0.89
IS	0.75	1.09	1.61	0.63	0.92	1.36
LI	0.66	0.85	1.45	0.48	0.63	1.06
NO	1.37	2.75	6.87	1.08	2.15	5.38
BG	0.25	0.36	0.51	0.72	1.04	1.45
RO	0.21	0.47	0.47	0.62	1.38	1.38
TR	0.69	1.56	2.90	1.31	2.96	5.48

Sources: 322PR Q6-30

**Notes**

Tariffs in national currency converted to EUR using average annual exchange rates.

Tariffs in national currency converted to PPS using Eurostat's Purchasing Power Parities. 1 Purchasing power standard (PPS) equals the average purchasing power within the Eurozone.



**Table 26. USP tariffs for second class correspondence**

	(1) SSC tariff, EUR, 1998	(2) SSC tariff, EUR, 1999	(3) SSC tariff, EUR, 2000	(4) SSC tariff, EUR, 2001	(5) SSC tariff, EUR, 2002	(6) SSC tariff, EUR, 2003	(7) % of FSC, 1998	(8) % of FSC, 2003
AT								
BE						0.41		84%
CY								
CZ						0.20		81%
DE								
DK	0.47	0.50	0.50	0.50	0.50	0.54	93%	94%
EE								
ES								
FI	0.40	0.40	0.50	0.50	0.50	0.55	80%	85%
FR	0.41	0.41	0.41	0.41	0.41	0.45	89%	90%
GB	0.29	0.30	0.31	0.31	0.30	0.29	77%	71%
GR	0.27	0.34	0.36	0.38	0.40	0.42	90%	89%
HU								
IE	0.36	0.00	0.00	0.00	0.00	0.00	88%	0%
IT	0.41	0.41	0.41	0.41	0.41	0.41	66%	66%
LT								
LU								
LV								
MT								
NL								
PL		0.17	0.20	0.27	0.29	0.27		67%
PT	0.25	0.25	0.26	0.26	0.28	0.30	63%	70%
SE						0.55		91%
SI	0.07	0.08	0.09	0.11	0.13	0.16	93%	86%
SK	0.07	0.09	0.09	0.13	0.14	0.17	27%	58%
IS								
LI						0.56		85%
NO	0.38	0.43	0.44	0.62	0.67	0.62	89%	91%
BG								
RO	0.07	0.09	0.10	0.10	0.09	0.10	100%	100%
TR								

Sources: 322PR Q2, Q3

Column 1: Tariff for the first weight step of second fastest standard category in EUR, 1998

Column 2: Tariff for the first weight step of second fastest standard category in EUR, 1999

Column 3: Tariff for the first weight step of second fastest standard category, in EUR, 2000

Column 4: Tariff for the first weight step of second fastest standard category, in EUR, 2001

Column 5: Tariff for the first weight step of second fastest standard category, in EUR, 2002

Column 6: Tariff for the first weight step of second fastest standard category, in EUR, 2003

Column 7: Tariff for the first weight step of second fastest standard category as percent of tariff for first weight step of first standard category in 1998

Column 8: Tariff for the first weight step of second fastest standard category as percent of tariff for first weight step of first standard category in 2003

**Notes**

Tariffs in national currency converted to EUR using average annual exchange rates.

**Table 27. USP tariffs for domestic single parcels, 5kg, in EUR, 1998-2003**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003	(7) CAGR 98-03
AT						4.70	
BE	6.69	6.69	6.69	6.69	6.69	6.69	0.0%
CY	2.24	2.24	2.26	2.61	2.59	2.56	2.8%
CZ						4.17	
DE		5.83	6.39	6.39	6.39	6.70	
DK	4.09	4.37	4.52	4.69	5.72	6.05	8.1%
EE	4.60	4.60	4.59	4.60	4.60	4.60	0.0%
ES						4.85	
FI	5.04	5.89	6.73	7.23	7.20	7.40	8.0%
FR			6.40	6.70	7.00	8.14	
GB	8.30	9.33	10.58	10.93	11.37	10.89	5.6%
GR	2.13	2.76	2.97	4.26	4.26	4.80	17.6%
HU	0.83	1.07	1.38	1.56	1.65	2.05	19.8%
IE			6.73	7.62	8.90	9.50	
IT	4.13	4.13	4.13	5.16	5.16	5.16	4.6%
LT	1.50	1.65	1.90	1.96	2.03	2.04	6.3%
LU	3.70	3.72	4.24	4.25	4.25	5.50	8.2%
LV	0.97	2.39	2.68	2.68	2.58	2.34	19.3%
MT					2.41	2.16	
NL	4.08	4.31	4.99	4.88	4.88	5.50	6.2%
PL				2.45	2.34		
PT	2.34	2.54	2.64	2.74	3.94	4.06	11.7%
SE						27.12	
SI	2.75	3.18	3.47	3.91	4.79	4.63	11.0%
SK	0.30	0.72	0.82	0.85	0.87	1.04	27.7%
IS	4.60	4.85	5.91	6.23	6.95	6.91	8.5%
LI						6.57	
NO	5.01	6.01	6.77	11.55	12.37	11.61	18.3%
BG							
RO	0.20	0.18	0.23	0.32	0.62	0.52	21.2%
TR						1.01	

Sources: 322PR Q58

Column 7: CAGR - average annual tariff increase (1998-2003)

**Notes**

Tariffs in national currency converted to EUR using average annual exchange rates.  
In each country, the table displays the lowest available tariff for domestic single parcels.

**Table 28. USP tariffs for domestic single parcels, 5kg, in PPS, 1998-2003**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003	(7) CAGR 98-03
AT						4.61	
BE	6.49	6.52	6.67	6.77	6.81	6.79	0.9%
CY	2.81	2.82	2.82	3.28	3.18	2.93	0.9%
CZ						8.64	
DE		5.32	5.98	5.95	5.98	6.39	
DK	3.23	3.54	3.69	3.81	4.54	4.77	8.1%
EE	9.93	9.75	9.58	9.04	8.75	8.91	-2.1%
ES						5.54	
FI	4.68	5.49	6.31	6.73	6.56	6.74	7.5%
FR			6.42	6.77	7.09	7.96	
GB	8.27	8.74	9.37	9.91	10.49	10.46	4.8%
GR	2.89	3.72	3.98	5.57	5.62	5.71	14.6%
HU	2.03	2.47	3.08	3.30	3.12	4.04	14.7%
IE			6.48	7.03	8.12	8.31	
IT	4.65	4.67	4.70	5.73	5.62	5.72	4.2%
LT	4.13	4.26	4.39	4.48	4.53	4.67	2.5%
LU	3.31	3.47	3.94	3.87	3.85	4.90	8.2%
LV	2.60	5.93	5.84	5.72	5.66	5.75	17.2%
MT					3.65	3.65	
NL	4.05	4.26	4.96	4.82	4.75	5.27	5.4%
PL				4.42	4.42		
PT	3.27	3.58	3.73	3.78	5.38	5.21	9.8%
SE						22.58	
SI	3.94	4.55	5.11	5.70	6.91	7.01	12.2%
SK	0.79	1.87	2.01	2.07	2.06	2.39	24.7%
IS	4.28	4.24	4.74	5.58	5.81	5.81	6.3%
LI						4.84	
NO	4.35	4.97	5.60	9.27	9.10	9.10	15.9%
BG							
RO	0.74	0.62	0.66	0.93	1.83	1.54	15.8%
TR						1.92	

Sources: 322PR Q58

Column 7: CAGR - average annual increase of tariff expressed in PPS(1998-2003)

**Notes**

Tariffs in national currency converted to PPS using Eurostat's Purchasing Power Parities. 1 Purchasing power standard (PPS) equals the average purchasing power within the Eurozone.

In each country, the table displays the lowest available tariff for domestic single parcels.

## **2.4 Technological and productivity developments**

**Table 29. Introduction of automated processes by USPs**

	(1) Letter sorters	(2) Bar coding letters	(3) OCR letter sorters	(4) Flat sorters	(5) Aut del seq sort	(6) Parcel sorters	(7) Bar coding parcels
AT							
BE	before98		before98	before98	2007orLater	before98	
CY	2001	2002	2001	NotPlanned	NotPlanned	NotPlanned	2002
CZ							
DE					1999	before98	
DK	before98	before98	1998	2003	2000	before98	before98
EE	1999	2002	NotPlanned	NotPlanned	NotPlanned	1999	2002
ES	before98	1998	before98	2003	NotPlanned	1999	before98
FI	before98	before98	before98	before98	NotPlanned	before98	2000
FR	before98	before98	before98	before98	before98	before98	1998
GB	before98	before98	before98	before98	2007orLater		
GR	2004	2002	2004	2006	2006	2004	2002
HU	before98	before98	before98	2004	NotPlanned	before98	before98
IE	before98	2005	before98	2001	2007orLater	2000	NotPlanned
IT	before98	before98	before98	before98	NotPlanned	NotPlanned	2000
LT	2007orLater	2005	2007orLater	2007orLater	2007orLater	NotPlanned	2005
LU	before98	2006	before98	1999	2006	2006	before98
LV	2005	2006	2005	2005	NotPlanned	NotPlanned	2005
MT	NotPlanned	2003	NotPlanned	NotPlanned	NotPlanned	NotPlanned	2005
NL	before98	before98	before98	1998	2003	before98	before98
PL	2002		2002	2002		2002	
PT	before98	before98	before98	2000	2000	before98	2003
SE							
SI	before98	2002	before98	2003	NotPlanned	before98	2003
SK	1999	before98	2007orLater	NotPlanned	2007orLater	before98	before98
IS	2000	NotPlanned	2000	NotPlanned	NotPlanned	NotPlanned	1999
LI							
NO	before98	before98	before98	1998	2006	before98	before98
BG							
RO	NotPlanned	NotPlanned	NotPlanned	NotPlanned	NotPlanned	NotPlanned	2003
TR							

Sources: Col 1: 233TD Q16; Col 2: 233TD Q13; Col 3: 233TD Q15; Col 4: 233TD Q17; Col 5: 233TD Q19; Col 6: 233TD Q18; Col 7: 233TD Q14

Column 1: Automated letter sorting machines: Year of introduction

Column 2: Electronic bar codes and bar code readers for letters: Year of introduction

Column 3: Sorting machines using optical character reading: Year of introduction

Column 4: Sorting machines for large sized letters: Year of introduction

Column 5: Automated delivery sequence sorting: Year of introduction

Column 6: Automated sorting machines for parcels: Year of introduction

Column 7: Electronic bar codes and bar code readers for parcels: Year of introduction

#### Notes

### **3 Universal service**

#### **3.1 Access to universal service**

**Table 30. Number of post offices and agencies**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003
AT	2,577	2,549	2,497	2,051	1,669	1,658
BE	1,400	1,400	1,368	1,355	1,342	1,328
CY	777	762	999	1,081	1,108	1,124
CZ	3,428	3,393	3,392		3,427	
DE	14,482	13,948	13,663	12,818	12,683	13,514
DK		1,160	1,115	1,083	1,048	1,019
EE	560	541	572	569	549	549
ES	10,515	10,386	10,183	10,158	10,101	10,021
FI	1,601	1,555	1,489	1,424	1,386	1,346
FR	17,018	17,080	17,065	17,125	17,048	16,965
GB	19,008	18,775	18,393	17,846		
GR	1,225	1,620	1,779	2,052	2,167	
HU	3,236	3,247	3,257	3,265	3,269	3,102
IE	1,911	1,913	1,914	1,783	1,766	1,648
IT	13,987	13,980	13,831	13,860	13,474	13,748
LT	967	965	953	944	944	945
LU	106	106	108	108	108	108
LV	989	989	970	967	964	968
MT	51	51	52	51	50	51
NL	2,387	2,361	2,282	2,313	2,407	2,431
PL					8,242	
PT	3,712	3,774	3,779	3,829	3,832	3,533
SE			2,218			
SI	549	552	550	550	552	554
SK					1,628	
IS	101	98	98	95	94	98
LI						
NO	1,280	1,256	1,253	1,328	1,450	1,478
BG					3,179	
RO	6,324	6,622	6,625	6,615	6,738	7,014
TR					1,395	

Sources: 321US Q6

**Notes**



**Table 31. Number of postal agencies**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003
AT	235	213	170	290		121
BE	0	0	0	0	0	0
CY	725	710	947	1,029	1,056	1,072
CZ	19	20	18		20	
DE	6,536	7,992	8,073	7,463	7,653	
DK		652	641	639	637	680
EE	22	27	30	18	15	5
ES	0	0	0	0	0	0
FI	1,030	988	1,015	1,102	1,089	1,053
FR	2,935	2,933	2,910	2,917	2,873	2,934
GB	18,407	18,175	17,795	17,249		
GR	219	637	800	1,064	1,188	
HU	281	314	380	413	432	419
IE	1,814	1,816	1,817	1,687	1,670	1,556
IT	0	0	0	0	0	0
LT	0	0	0	0	0	0
LU	0	0	3	3	3	3
LV	0	0	0	0	0	0
MT	21	21	21	20	20	20
NL	2,239	2,214	2,138	2,087	2,102	2,099
PL					2,640	
PT	2,659	2,714	2,722	2,766	2,758	2,471
SE			648			
SI	0	0	0		0	3
SK					2	
IS	3	7	13	21	28	40
LI						
NO	370	376	378	897	1,146	1,175
BG					158	
RO	0	0	0	0	0	0
TR						

Sources: 321US Q8

**Notes**

**Table 32. Number of post offices staffed by USP's employees**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003
AT	2,342	2,336	2,327	1,761		1,658
BE	1,400	1,400	1,368	1,355	1,342	1,328
CY	52	52	52	52	52	52
CZ	3,409	3,373	3,374		3,407	
DE	7,946	5,956	5,590	5,311	5,030	
DK		508	474	444	375	339
EE	560	541	572	551	548	548
ES						
FI	571	567	474	322	297	293
FR	14,083	14,147	14,155	14,208	14,175	14,031
GB	601	600	598	597		
GR	1,006	983	979	988	979	
HU	2,955	2,933	2,877	2,852	2,837	2,683
IE	97	97	97	96	96	92
IT	13,987	13,980	13,831	13,860	13,474	13,748
LT	967	965	953	944	944	945
LU	106	106	105	105	105	105
LV	989	989	970	967	964	968
MT	30	30	31	31	30	30
NL	148	147	144	226	305	332
PL					5,602	
PT	1,053	1,060	1,057	1,063	1,074	1,062
SE			1,570			
SI	549	552	550	550	552	551
SK					1,626	
IS	101	98	98	95	94	98
LI						
NO	910	881	875	431	304	303
BG					3,021	
RO	6,324	6,622	6,625	6,615	6,738	7,014
TR					1,395	

Sources: 321US Q7

**Notes**

**Table 33. USP access: Postal outlets per 1,000 skm, 1998-2003**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003
AT	31	30	30	25	20	20
BE	46	46	45	44	44	44
CY	84	82	108	117	120	122
CZ	43	43	43		43	
DE	41	39	38	36	36	38
DK		27	26	25	24	24
EE	12	12	13	13	12	12
ES	21	21	20	20	20	20
FI	5	5	4	4	4	4
FR	31	31	31	31	31	31
GB	78	77	75	73		
GR	9	12	13	16	16	
HU	35	35	35	35	35	33
IE	27	27	27	25	25	23
IT	46	46	46	46	45	46
LT	15	15	15	14	14	14
LU	41	41	42	42	42	42
LV	15	15	15	15	15	15
MT	161	161	165	161	158	161
NL	58	58	56	57	59	60
PL					26	
PT	40	41	41	41	41	38
SE			5			
SI	27	27	27	27	27	27
SK					33	
IS	1	1	1	1	1	1
LI						
NO	4	4	4	4	4	5
BG					29	
RO	27	28	28	28	28	30
TR					2	

Sources: 321US Q6

**Notes**

**Table 34. USP access: Postal outlets per 10,000 persons, 1998-2003**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003
AT	3.23	3.19	3.12	2.56	2.08	2.06
BE	1.37	1.37	1.34	1.32	1.30	1.28
CY	11.51	11.16	14.47	15.50	15.70	15.72
CZ	3.33	3.30	3.30		3.36	
DE	1.76	1.70	1.66	1.56	1.54	1.64
DK		2.18	2.09	2.02	1.95	1.89
EE	4.02	3.92	4.17	4.16	4.03	4.05
ES	2.67	2.63	2.56	2.53	2.50	2.48
FI	3.11	3.01	2.88	2.75	2.67	2.59
FR	2.92	2.92	2.90	2.90	2.87	2.85
GB	3.22	3.16	3.08	2.98		
GR	1.17	1.54	1.69	1.94	2.05	
HU	3.15	3.17	3.19	3.20	3.21	3.06
IE	5.17	5.12	5.07	4.66	4.53	4.16
IT	2.43	2.43	2.40	2.40	2.33	2.38
LT	2.71	2.73	2.71	2.71	2.72	2.73
LU	2.50	2.47	2.48	2.46	2.43	2.41
LV	4.02	4.05	4.08	4.09	4.11	4.15
MT	1.35	1.35	1.37	1.30	1.27	1.29
NL	1.52	1.50	1.44	1.45	1.49	1.50
PL					2.13	
PT	3.67	3.72	3.71	3.73	3.71	3.39
SE			2.50			
SI	2.77	2.79	2.77	2.76	2.77	2.78
SK					3.03	
IS	3.71	3.55	3.51	3.35	3.28	3.40
LI						
NO	2.90	2.83	2.80	2.95	3.21	3.25
BG					4.03	
RO	2.81	2.94	2.95	2.95	3.09	3.22
TR						

Sources: 321US Q6

**Notes**

**Table 35. Number of street letter boxes**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003
AT			21,950			
BE	19,655	20,317	19,500	19,300	19,000	18,800
CY	414	438	460	480	800	850
CZ					24,311	
DE	140,000	140,000	140,000	140,000	108,000	
DK	10,267	10,289	9,806	9,806	9,398	9,274
EE	3,606	3,846	3,547	3,509	3,680	3,735
ES	34,715	37,490	37,812	37,962	40,564	33,084
FI						
FR			134,500			
GB			121,000	121,000	121,000	121,000
GR	14,640	13,025	13,672	13,256	13,995	
HU	16,972	16,695	16,719	17,320	16,751	15,971
IE	5,400	6,300	6,200	6,200	6,200	6,200
IT	70,000	80,000	80,800	66,000	66,800	67,200
LT	4,564	4,656	4,498	4,385	4,311	4,290
LU	1,181	1,181	1,171	1,164	1,164	1,164
LV					2,464	
MT	599	599	587	588	526	525
NL	19,437	19,599	19,725	19,782	19,814	19,671
PL					57,000	56,906
PT	18,621	18,698	18,766	18,766	18,573	18,583
SE			40,000			
SI	2,876	2,911	2,952	2,939	2,843	2,848
SK					7,096	
IS	250	253	256	259	258	262
LI						
NO			24,701	27,790	27,762	27,295
BG					5,431	
RO	13,500	13,500	11,950	13,500	11,173	12,467
TR					2,463	

Sources: 321US Q10

**Notes**

**Table 36. USP access: Collection boxes per 1,000 skm, 1998-2003**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003
AT			263			
BE	644	666	639	632	623	616
CY	45	47	50	52	86	92
CZ					308	
DE	392	392	392	392	303	
DK	238	239	228	228	218	215
EE	80	85	78	78	81	83
ES	69	74	75	75	80	66
FI						
FR			244			
GB			496	496	496	496
GR	111	99	104	100	106	
HU	182	179	180	186	180	172
IE	77	90	88	88	88	88
IT	232	266	268	219	222	223
LT	70	71	69	67	66	66
LU	457	457	453	450	450	450
LV					38	
MT	1,896	1,896	1,858	1,861	1,665	1,661
NL	476	480	483	484	485	482
PL					182	182
PT	202	202	203	203	201	201
SE			89			
SI	142	144	146	145	140	140
SK					145	
IS	2	2	2	3	3	3
LI						
NO			76	86	86	84
BG					49	
RO	57	57	50	57	47	52
TR					3	

Sources: 321US Q10

**Notes**

**Table 37. USP access: Collection boxes per 10,000 persons, 1998-2003**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003
AT			27.43			
BE	19.28	19.89	19.04	18.80	18.43	18.15
CY	6.13	6.41	6.66	6.88	11.34	11.89
CZ					23.82	
DE	17.06	17.07	17.04	17.02	13.10	
DK	19.39	19.36	18.40	18.33	17.51	17.23
EE	25.89	27.88	25.85	25.67	27.03	27.54
ES	8.81	9.49	9.52	9.46	10.04	8.19
FI						
FR			22.89			
GB			20.29	20.21	20.21	20.21
GR	13.93	12.38	12.95	12.56	13.26	
HU	16.51	16.28	16.36	16.98	16.46	15.75
IE	14.62	16.87	16.42	16.20	15.90	15.64
IT	12.16	13.89	14.01	11.41	11.55	11.62
LT	12.81	13.17	12.81	12.58	12.40	12.39
LU	27.87	27.52	26.88	26.48	26.21	25.96
LV					10.50	
MT	15.91	15.82	15.44	15.02	13.33	13.30
NL	12.42	12.44	12.43	12.37	12.30	12.15
PL					14.75	14.89
PT	18.42	18.42	18.40	18.29	17.98	17.86
SE			45.14			
SI	14.49	14.71	14.85	14.77	14.26	14.28
SK					13.19	
IS	9.18	9.18	9.17	9.14	9.00	9.08
LI						
NO			55.15	61.71	61.37	59.96
BG					6.88	
RO	5.99	6.00	5.32	6.02	5.12	5.73
TR						

Sources: 321US Q10

**Notes**





## **3.2 Quality of service**

**Table 38. Development of quality of postal services in the last 5 years**

	(1) Letter mail - NRA	(2) Letter mail - USP	(3) Parcels - NRA	(4) Parcels - USP
AT	4	5	4	4
BE	5	4	0	3
CY	3	3	3	3
CZ	3		3	
DE	4	5	4	5
DK	4	4	3	4
EE	4	4	4	4
ES		4		0
FI	4	3	4	4
FR	3	2	4	4
GB	3	3	4	
GR	4	5		4
HU	3	2	3	4
IE	1	4	3	4
IT	5	5	4	4
LT	4	4	4	4
LU	4	4	3	4
LV	4	4	4	4
MT	3	2	3	3
NL	4	4	3	5
PL	5		5	
PT	4	4	2	3
SE	3		3	
SI	4	4	5	4
SK	4	4	4	4
IS		5		4
LI				
NO	5	4	4	4
BG	4		4	
RO	4	4	4	4
TR				

Sources: Col 1: 221FD Q11; Col 2: 221FD Q21; Col 3: 221FD Q11; Col 4: 221FD Q21

All columns: 5 = Strong increase; 4 = Slight increase; 3 = No change; 2 = Slight decrease; 1 = Strong decrease; 0 = No opinion.

#### Notes

**Table 39. Transit time targets for the fastest standard category (D+1)**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003
AT						
BE	90.0%	90.0%	90.0%	90.0%	91.0%	92.0%
CY						70.0%
CZ	85.0%	86.0%	87.0%	88.0%	89.0%	90.0%
DE	80.0%	80.0%	80.0%	80.0%	80.0%	80.0%
DK	97.0%	97.0%	97.0%	97.0%	97.0%	97.0%
EE					90.0%	90.0%
ES						
FI	95.0%	95.0%	95.0%	95.0%	95.0%	95.0%
FR	84.0%	84.0%	84.0%	84.0%	84.0%	84.0%
GB	92.5%	92.5%	92.5%	92.5%	92.5%	
GR				70.0%	77.0%	82.0%
HU					75.0%	80.0%
IE	95.0%	95.0%	95.0%	95.0%	92.0%	94.0%
IT			80.0%	80.0%	80.0%	87.0%
LT						
LU				95.0%	95.0%	95.0%
LV						80.0%
MT						
NL			95.0%	95.0%	95.0%	95.0%
PL						85.0%
PT	96.2%	96.2%	96.2%	93.0%	93.1%	93.2%
SE	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%
SI						95.0%
SK				93.0%	94.0%	94.5%
IS	85.0%	85.0%	85.0%	85.0%	85.0%	
LI						
NO	93.0%	93.0%	85.0%	85.0%	85.0%	85.0%
BG						
RO						
TR						

Sources: 331NR Q31

**Notes**

**Table 40. Transit time performance for the fastest standard category (D+1)**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003
AT						
BE	74.2%	75.1%	82.0%	74.9%	82.7%	85.1%
CY						38.0%
CZ	87.6%	90.4%	93.7%	92.2%	92.7%	
DE	94.8%	95.0%	95.6%	94.5%	95.4%	96.0%
DK	94.5%	95.2%	95.0%	94.9%	93.6%	95.1%
EE						
ES						
FI	95.0%	95.0%	95.0%	95.0%	95.0%	95.0%
FR	76.4%	80.5%	77.1%	77.0%	76.1%	70.0%
GB					92.6%	
GR					47.8%	62.9%
HU					67.0%	60.0%
IE						71.0%
IT			82.3%	82.2%	84.0%	87.0%
LT						
LU	97.1%	96.7%	96.5%	97.4%	97.5%	
LV						80.0%
MT						
NL	93.0%	89.0%	94.0%	95.6%	95.6%	
PL						
PT	96.6%	96.6%	96.4%	93.7%	93.1%	91.6%
SE	94.8%	95.2%	95.4%	95.8%	95.3%	95.7%
SI						
SK					94.7%	92.3%
IS	78.9%	74.2%	71.9%	81.4%	87.4%	
LI						
NO	76.9%	78.3%	83.1%	82.5%	86.3%	87.7%
BG						
RO						
TR						

Sources: 331NR Q36

**Notes**

---

**- Appendix D -**  
General Data

---



## List of Tables

- |         |   |
|---------|---|
| Table 1 | Exchange rates, 1 EUR in national currency, 1998-2003 |
| Table 2 | Area, population and GDP by country, 2003             |
| Table 3 | Gross domestic product per capita, 1998-2003, in EUR  |
| Table 4 | Gross domestic product per capita, 1998-2003, in PPS  |





**Table 1. Exchange rates, 1 EUR in national currency, 1998-2003**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003
ATS	13,7718	13,7603	13,7603	13,7603	13,7603	13,7603
BEF	40,3746	40,3399	40,3399	40,3399	40,3399	40,3399
BGL	1.952,1288	1.970,1155	1.895,3952	1.950,3100	1.951,2500	1.950,9000
BGN	1,9521	1,9701	1,8954	1,9503	1,9513	1,9509
CHF	1,5934	1,6010	1,5582	1,5111	1,4670	1,5211
CYP	0,5815	0,5800	0,5753	0,5747	0,5784	0,5855
CZK	35,0464	36,8987	35,6477	34,0860	30,9138	31,8945
DEM	1,9575	1,9558	1,9558	1,9558	1,9558	1,9558
DKK	7,4518	7,4401	7,4590	7,4566	7,4341	7,4336
EEK	15,6363	15,6500	15,6873	15,6480	15,6527	15,6500
ESP	166,6101	166,3860	166,3860	166,3860	166,3860	166,3860
FIM	5,9524	5,9457	5,9457	5,9457	5,9457	5,9457
FRF	6,5645	6,5596	6,5596	6,5596	6,5596	6,5596
GBP	0,6989	0,6595	0,6099	0,6223	0,6289	0,6924
GRD	328,6219	325,8422	336,7155	340,7500	340,7500	340,7500
HUF	253,1172	252,8799	260,7634	256,8407	243,2794	253,9213
IEP	0,7885	0,7876	0,7876	0,7876	0,7876	0,7876
ISK	81,5942	77,2699	72,7380	87,4468	86,3665	86,8225
ITL	1.938,3271	1.936,2700	1.936,2700	1.936,2700	1.936,2700	1.936,2700
LTL	4,6873	4,2688	3,7009	3,5871	3,4634	3,4528
LUF	40,5329	40,3399	40,3399	40,3399	40,3399	40,3399
LVL	0,6622	0,6263	0,5601	0,5607	0,5816	0,6414
MTL	0,4427	0,4277	0,4057	0,4036	0,4153	0,4621
NLG	2,2054	2,2037	2,2037	2,2037	2,2037	2,2037
NOK	8,9896	8,3197	8,1206	8,0528	7,5176	8,0086
PLN	4,0855	4,2281	4,0181	3,6751	3,8491	4,4002
PTE	200,7971	200,4820	200,4820	200,4820	200,4820	200,4820
ROL	12.592,2588	16.341,6480	19.947,1312	26.295,5447	32.267,9833	38.588,0507
SEK	9,4380	8,8139	8,4501	9,2524	9,1629	9,1275
SIT	189,0805	195,0042	207,4830	219,0688	229,7991	237,7852
SKK	42,6483	44,1613	42,7603	43,3459	42,7360	41,5356
TRL	365.089,6471	446.742,0219	575.741,6503	1.109.385,9890	1.465.163,9151	1.726.899,3918

**Notes**

Source: oanda.com

1998: 1 ECU in national currency

BG: Until a general denomination (division by 1,000) in June 2000 the Bulgarian currency was "Leva" (BGL). Since June 2000 the Bulgarian currency is "New Leva" (BGN).

**Table 2. Area, population and GDP by country, 2003**

	(1) Area (thou sq.km)	(2) Area % of EU-25	(3) Population (thou)	(4) Population % of EU-25	(5) GDP (bln EUR)	(6) GDP % of EU-25
AT	83,6	2,10%	8.067	1,78%	223	2,29%
BE	30,5	0,77%	10.356	2,28%	266	2,73%
CY	9,3	0,23%	715	0,16%	11	0,12%
CZ	78,9	1,98%	10.203	2,25%	79	0,81%
DE	356,9	8,97%	82.537	18,18%	2.129	21,89%
DK	43,1	1,08%	5.384	1,19%	187	1,92%
EE	45,2	1,14%	1.356	0,30%	7	0,08%
ES	504,8	12,68%	40.409	8,90%	741	7,62%
FI	338,1	8,49%	5.206	1,15%	143	1,47%
FR	551,5	13,86%	59.630	13,13%	1.548	15,91%
GB	244,1	6,13%	59.863	13,19%	1.590	16,35%
GR	132,0	3,32%	10.554	2,32%	154	1,58%
HU	93,0	2,34%	10.142	2,23%	72	0,74%
IE	70,3	1,77%	3.964	0,87%	133	1,37%
IT	301,3	7,57%	57.844	12,74%	1.301	13,37%
LT	65,3	1,64%	3.463	0,76%	16	0,16%
LU	2,6	0,06%	448	0,10%	23	0,24%
LV	64,6	1,62%	2.331	0,51%	9	0,09%
MT	0,3	0,01%	395	0,09%	5	0,05%
NL	40,8	1,03%	16.193	3,57%	453	4,66%
PL	312,7	7,86%	38.219	8,42%	185	1,90%
PT	92,4	2,32%	10.407	2,29%	133	1,37%
SE	450,0	11,30%	8.941	1,97%	266	2,73%
SI	20,3	0,51%	1.995	0,44%	24	0,25%
SK	49,0	1,23%	5.379	1,18%	29	0,30%
IS	103,0	2,59%	288	0,06%	9	0,10%
LI	0,2	0,00%	34	0,01%		
NO	323,9	8,14%	4.552	1,00%	195	2,00%
BG	110,9	2,79%	7.846	1,73%	18	0,18%
RO	237,5	5,97%	21.773	4,80%	48	0,50%
TR	779,5	19,58%			215	2,21%

**Notes**

Source: Eurostat NewCronos

**Table 3. Gross domestic product per capita, 1998-2003, in EUR**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003	(7) CAGR 98-03
AT	23.752	24.687	25.827	26.494	27.159	27.668	3,1%
BE	21.947	23.078	24.201	24.729	25.220	25.666	3,2%
CY	12.026	12.744	13.942	14.630	15.248	15.824	5,6%
CZ	4.917	5.012	5.866	6.642	7.661	7.733	9,5%
DE	23.354	24.118	24.707	25.209	25.599	25.797	2,0%
DK	29.098	30.569	32.192	33.252	34.112	34.773	3,6%
EE	3.352	3.537	4.070	4.577	5.072	5.460	10,3%
ES	13.341	14.307	15.346	16.283	17.229	18.343	6,6%
FI	22.457	23.255	25.167	26.146	26.912	27.548	4,2%
FR	22.257	23.165	24.173	24.992	25.628	25.953	3,1%
GB	21.502	23.103	26.177	26.702	27.705	26.565	4,3%
GR	10.368	11.201	11.667	12.414	13.393	14.585	7,1%
HU	4.079	4.396	4.956	5.674	6.773	7.099	11,7%
IE	21.026	23.994	27.232	29.989	33.166	33.650	9,9%
IT	18.570	19.232	20.225	21.066	21.790	22.490	3,9%
LT	2.726	2.826	3.444	3.802	4.222	4.488	10,5%
LU	39.861	43.660	48.791	50.024	50.435	51.518	5,3%
LV	2.212	2.556	3.266	3.635	3.811	3.756	11,2%
MT	8.318	9.782	10.857	11.111	11.177	11.430	6,6%
NL	22.464	23.735	25.359	26.842	27.609	27.973	4,5%
PL	3.892	3.992	4.672	5.360	5.237	4.829	4,4%
PT	9.928	10.643	11.330	11.966	12.543	12.767	5,2%
SE	24.997	26.627	29.330	27.568	28.702	29.712	3,5%
SI	9.272	9.981	10.281	10.927	11.708	12.279	5,8%
SK	3.668	3.547	4.061	4.336	4.774	5.446	8,2%
IS	26.206	28.638	32.705	30.084	31.541	32.709	4,5%
LI							
NO	30.272	33.377	40.433	42.118	44.767	42.835	7,2%
BG	1.375	1.478	1.673	1.923	2.101	2.277	10,6%
RO	1.662	1.485	1.797	2.001	2.215	2.226	6,0%
TR							

Column 7: Compound annual growth rate for six year period 1998-2003

**Notes**

Source: Eurostat NewCronos

**Table 4. Gross domestic product per capita, 1998-2003, in PPS**

	(1) 1998	(2) 1999	(3) 2000	(4) 2001	(5) 2002	(6) 2003	(7) CAGR 98-03
AT	22.978	24.285	25.951	26.177	26.736	26.912	3,2%
BE	21.455	22.488	24.124	25.010	25.671	25.910	3,8%
CY	15.047	15.992	17.366	18.397	18.599	18.915	4,7%
CZ	12.703	12.530	13.499	14.090	14.876	15.224	3,7%
DE	21.118	22.004	23.124	23.478	23.969	24.044	2,6%
DK	23.082	24.747	26.219	26.966	27.059	27.227	3,4%
EE	7.277	7.495	8.476	8.996	9.642	10.210	7,0%
ES	16.487	17.872	18.992	19.739	20.781	21.406	5,4%
FI	21.004	21.682	23.611	24.349	24.519	24.536	3,2%
FR	21.793	22.859	24.265	25.240	25.959	25.897	3,5%
GB	20.734	21.639	23.168	24.194	25.551	26.163	4,8%
GR	13.666	14.407	15.468	16.252	17.684	18.522	6,3%
HU	9.501	10.184	11.038	12.003	12.823	13.371	7,1%
IE	21.708	23.845	26.236	27.667	30.245	29.545	6,4%
IT	20.997	21.762	22.993	23.386	23.748	23.693	2,4%
LT	7.180	7.287	7.930	8.675	9.395	10.049	7,0%
LU	35.851	40.686	45.331	45.563	45.653	45.510	4,9%
LV	5.927	6.304	7.116	7.759	8.355	8.886	8,4%
MT	11.322	15.574	16.492	16.288	16.669	16.940	8,4%
NL	22.450	23.480	25.191	26.547	26.886	26.652	3,5%
PL	7.711	8.913	9.462	9.670	9.917	10.399	6,2%
PT	13.951	15.011	15.996	16.529	17.113	16.887	3,9%
SE	21.251	22.985	24.751	24.825	25.196	25.393	3,6%
SI	13.072	14.254	15.063	15.858	16.611	16.921	5,3%
SK	8.822	9.164	9.917	10.481	11.328	11.900	6,2%
IS	23.850	24.964	26.195	26.909	26.341	26.350	2,0%
LI							
NO	24.750	27.559	33.410	33.783	32.907	32.984	5,9%
BG	4.829	5.105	5.540	6.066	6.338	6.819	7,1%
RO	4.896	4.975	5.229	5.694	6.346	6.741	6,6%
TR							

Column 7: Compound annual growth rate for six year period 1998-2003

**Notes**

Source: Eurostat NewCronos