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ERGP (13) 33 Rev. 1 – ERGP report on market indicators

# ERGP REPORT ON INDICATORS ON THE POSTAL MARKET

**May 2014**

# Contents

## List of Tables



## List of Figures

## Country codes

| | | |
|---|---|---|
| AT – Austria | BE – Belgium | BG – Bulgaria |
| CH – Switzerland | CZ – Czech Republic | CY – Cyprus |
| DE – Germany | DK – Denmark | EE – Estonia |
| EL – Greece | ES – Spain | FI – Finland |
| FR – France | FYROM – Former Yugoslav Republic of Macedonia[1] | |
| HR – Croatia | HU – Hungary | IE – Ireland |
| IT – Italy | IS – Iceland | LT – Lithuania |
| LU – Luxembourg | LV – Latvia | MT – Malta |
| NL – Netherlands | NO – Norway | PL – Poland |
| PT – Portugal | RO – Romania | RS – Serbia |
| SE – Sweden | SI – Slovenia | SK – Slovakia |
| UK – United Kingdom | | |

[1] FY is used in tables and figures for the Former Yugoslav Republic of Macedonia.

## 1. Executive Summary

The objective of this report is to provide information about the postal market in the countries whose NRAs are members and observers of ERGP (EU Member States, EEA countries and EU candidate countries). This report provides a compilation of data on specific indicators about the postal market, covering, for some indicators, the period from 2008 to 2012. This is the second report of this kind published by ERGP[2].

Since countries face specific situations, any benchmark analysis made from the information in this report should take into consideration the existence of differences between countries. These may be at different levels, for example from different powers of NRAs to collect data and different reporting requirements, to different scope of services forming part of the universal service.

Having this in mind, the report starts by presenting (chapters 4 to 6) information on the powers of NRAs to collect data, on the scope of services considered as postal services and as universal services and provides a general overview on the authorisation system implemented.

It can be concluded that most NRAs have the power to collect data from the postal operators and that some NRAs have seen the scope of their powers to collect data expanded. Since 2013 all the NRAs that have responded now have powers to collect data about the universal service not only from the postal service provider or incumbent but also from other postal service providers. Only a few NRAs do not have powers to collect statistical data about services outside the scope of the universal service.

The scope of postal services also differs between countries. Correspondence, up to 2 Kg, is considered as a postal service in all the countries. The only postal product that is part of the universal service in every country is single piece correspondence and standard single piece parcel. Some bulk mail services are being removed from the scope of the universal service in some countries.

Countries have also implemented different systems for regulating entrants to the market. While in some countries no registration system is necessary (as for example in the NL and in the UK), in others a licence or a general authorisation is needed. Licensing is the most common system implemented to provide services within the scope of the universal service, while for providing services outside the scope of the universe service authorisation/registration is most common.

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[2] The first one is the ERGP (12) 33 – Report on market data on indicators.

Chapter 7 provides information about prices of standard items of correspondence up to 20 gr provided by the USP/Incumbent at a single piece tariff for typical residential customers. In 2012, the average price in Europe for posting a priority letter weighing less than 20 gr within a country (domestic letter) was 0.56€, a slight increase on 2011 (0,55€). The average price of domestic non-priority letter in 2012 was 0,49€, again an increase compared to 2011 (0,47€).

Chapter 8 provides information about market structure indicators. Considered as a whole, the postal market is highly concentrated (HHI> 2500) although the majority of the countries that have responded show a slight decrease in the level of concentration.

In chapter 9 the report provides information about the evolution of volumes between 2008 and 2012. The countries of Western Europe and of Northern Europe are characterized by an extensive use of postal services. Eastern European countries, in particular, seem to use postal services less with a number of objects per year per capita much smaller (about a few dozen only).

Total postal traffic is declining in almost all European countries and this phenomenon is particularly marked in the northern countries of Western Europe. Letter post items represent the major part of the postal market. The volumes of this segment of the market are declining throughout Europe, decreasing between 10 and 20% for the period from 2008 to 2011 in most European countries.

Overall, the shipments of international parcels are growing. But the volumes remain rather low. There is no clear tendency concerning the use of registered mail (that is mandatory in many legal, administrative or commercial procedures). Unlike other postal services, volumes of express mail per capita are growing quickly in most of the countries.

Trends in revenues are provided in chapter 10 of the report. As in the case for volumes, there is a reduction in the revenues in many countries.

Chapter 11 refers to employment. In 2012, the proportion of total employment in each Member State which is accounted for by the USP is, in all cases, less than 1% of total employment. In most cases, the proportion of the total workforce that is employed by the USP has fallen since 2008.

Between 2008 and 2012, the density of postal establishments has remained relatively stable (please refer to chapter 12).

Chapter 13 provides information about investment in the sector. The information available is still limited.

## 2. Background and objectives

According to the Postal Directive, 2013 is the first year of full market opening for the Member States of the European Union.

National Regulatory Authorities (NRAs) have as a particular task to ensure compliance with the obligations arising from the Directive, in particular by establishing monitoring and regulatory procedures to ensure the provision of the universal postal service.

In 2012 ERGP produced a report on the methodology and indicators for postal market, identifying core indicators to monitor market developments [document ERGP (12) 32]. Table 1 summarizes the core indicators suggested in the report.

**Table 1 – Summary of core indicators**

| Category | Indicator |
|---|---|
| **Market outcomes** | End-user price of service provided at single piece tariff for typical residential customer |
| | Price of service provided for bulk mail |
| | Quality of service indicators |
| **Market structure** | Number of active postal service providers (total, by service/destination) |
| | Market shares by revenues/volumes (total, by service/destination) |
| | Concentration ratio index ($CR_n$) of the n largest providers |
| | Herfindahl-Hirschman Index (HHI) |
| **Revenues and volumes** | Total revenues on postal activities / GDP |
| | Revenues (total, by service/destination) |
| | Volumes (total, by service/destination) |
| | Percentage of revenues (or volumes) of the reserved area |
| **Access points** | Number of postal establishments (total, by category) |
| | Postal coverage (number of postal establishments per 100 $km^2$) |
| | Postal density (Number of inhabitants / number of postal establishments) |
| **Customer satisfaction** | Number of customer complaints by category |
| | Number of customer complaints by category, as a percentage of the (correspondent) real mail volume |
| | Customer satisfaction index |
| **Employment** | Number of persons employed in the postal sector |
| **Investment** | Investment in the postal sector |

ERGP's work programme for 2013[3] included the implementation, at the ERGP level, of the said ERGP report of 2012, consisting of the publication of data on specific indicators selected from the ones suggested by ERGP in the 2012 report. The work also keeps track of the scope of the universal postal services.

This report provides a compilation of the results of the data collection implemented in 2013, also using data collected by ERGP in 2012 and 2011.

[3]Ref. ERGP (12) 37, available at http://ec.europa.eu/internal_market/ergp/docs/documentation/2012/ergp-12-37-final-work-programme_en.pdf.

## 3. Methodology and considerations regarding comparability of data

Two questionnaires (one quantitative and one qualitative) were sent out on 29 May 2013 to be returned by 21 June 2013. Additional contributions were received after that date.

NRAs' from the following 30 countries (out of 33) provided feedback on the questionnaires: Austria, Belgium, Croatia, Cyprus, Czech Republic, Denmark, Finland, Former Yugoslav Republic of Macedonia, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Norway, Poland, Portugal, Romania, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, the Netherlands and the United Kingdom.

This report reflects the answers from NRAs to the questionnaires. In some situations data collected by ERGP in 2011 and 2012 is also used.

It should be taken into consideration that not all NRAs provided responses to all the questions, reflecting the different practices on the scope and level of detail of data collection.

Moreover, countries face specific situations. In order to be able to develop and interpret any benchmark analysis, or at least to take into consideration differences between national markets, and before presenting the results of the data collection, an overview on some aspects of each national market is provided. The report presents information on the scope of the services considered as postal services and as universal services in the national markets of ERGP members and observers. It also presents a general overview on the authorisation systems implemented and on the powers of NRAs to collect data from postal service providers, since this may contribute to an understanding if NRAs have information on the postal service providers active in the market through information provided by the postal service provider to the NRA.

## 4. Power of NRAs to collect data

Most NRAs have the power to collect data from the postal operators. This power can be applied to the universal service (US) and outside the scope of the universal service (non-US).

Table 2 shows the situation as per 2012[4] and Table 3 the situation in 2013.

**Table 2– Power of NRAs to collect data (answers to questionnaire of 2012)***

| | Answer | Count | Country (NRA) |
|---|---|---|---|
| From the USP on US | Yes | 30 | BE, BG, CY, CZ, DE, DK, EE, EL, ES, FR, FY, HR, HU, IE, IT, LT, LU, MT, NL, PL, PT, RO, SK, SI, CH, UK, FI, NO, RS, SE. |
| | No | 1 | AT[a] |
| From the USP on non-US | Yes | 25 | BE, BG, CH, DE, DK, EE, EL, FR, FY, HR, HU, IE, IT, LT, MT, NL[b], PL, PT, RO, SK, SI, UK, CY, FI, RS. |
| | No | 5 | AT[a], CZ, LU, NO, SE. |
| From other PO on US | Yes | 25 | BE, BG, CH, HR, DE, DK, EE, EL, ES, FR, FI, FY, HU, IE, IT, LT, LU, MT, PL, PT[c], RO, SI, SE, SK, UK. |
| | No | 4 | AT, CZ, CY, NO. |
| | N/A | 2 | NL, RS[d] |
| From other PO on non-US | Yes | 22 | BE, BG, DE, DK, EL, EE, FI, FR, FY, HR, HU, IE, IT, LT, MT, PL, PT[c], RO, SI, NL[b], SK, UK. |
| | No | 9 | AT, CH, CZ, CY, ES, LU, NO, RS, SE. |

* Source: Report ERGP (12) 32 and ANCOM; answers from 31 NRAs.

N/A – Not applicable.

[a] AT - The NRA is only allowed to collect data from the USP with regard to procedures.

[b] OPTA can require from any (natural or legal) person, the data and information that it needs to properly execute the duties with which it is charged by or pursuant to the Postal Act. It follows that OPTA is not entitled to require information or data that cannot be related to any duties under the Postal Act.

[c] The NRA has the power to collect data only from authorised or licensed providers (i.e. providers which are directly or indirectly involved in all the 4 phases of postal service provision: clearance, sorting, transport and distribution).

[d] Other postal service providers are not allowed to provide US.

[4] Source: ERGP (12) 32 Report.

**Table 3– Power of NRAs to collect data (answers to questionnaire of 2013)***

| | Answer | Count | Country (NRA) |
|---|---|---|---|
| From the USP on US | Yes | 28 | AT[a], BE, BG, CZ, DE, DK, EL, ES, FR, FY, HR, HU, IE, IT, LT, LU, LV, MT, NL, PL, PT, RO, SK, SI, CH, UK, RS, SE. |
| | No | 0 | |
| From the USP on non-US | Yes | 27 | AT[a], BE, BG, CH, CZ[f], DE, DK, EL,ES, FR, FY, HR, HU, IE, IT, LT, LU, LV, MT, NL[b], PL, PT, RO, SK, SI, UK, RS. |
| | No | 1 | SE. |
| From other PO on US | Yes | 26 | AT[a], BE, BG, CH, CZ[f], HR, DE, DK, EL, ES, FR, FY, HU, IE, IT, LT, LU, LV, MT, PL, PT[c], RO, SI, SE, SK, UK. |
| | No | 0 | |
| | N/A | 3 | FI, NL, RS[d] |
| From other PO on non-US | Yes | 27 | AT[a], BE, BG, CH[e], CZ[f], DE, DK, EL, ES, FR, FY, HR, HU, IE, IT, LT, LU, LV, MT, PL, PT[c], RO, SI, NL[b], RS, SK, UK. |
| | No | 1 | SE. |

* Source: ERGP questionnaire of 2013.

N/A – Not applicable.

[a] AT - From 1 July 2013 an ordinance allows the NRA to collect data quarterly from all postal operators. Until 1 July 2013 the NRA was only allowed to collect data from the USP with regard to procedures.

[b] The NRA can require from any (natural or legal) person, the data and information that it needs to properly execute the duties with which it is charged by or pursuant to the Postal Act. It follows that OPTA is not entitled to require information or data that cannot be related to any duties under the Postal Act.

[c] The NRA has the power to collect data only from authorised or licensed providers.

[d] Other postal service providers are not allowed to provide US.

[e] Since October 2012 the ordinance of the new postal act is valid in Switzerland. Since October 2012 the NRA collects also data of express mail and parcels till 30kg.

[f] The NRA is empowered to collect data from all postal providers about all postal services since 1 January 2013.

- From the USP[5]

All NRAs that answered the questionnaire are empowered to collect data from the USP, within the scope of the universal service.

[5] Germany has no designated USP. In the case of Germany, the references to the USP along the report should be considered as being made to the incumbent.

In Austria, until 1 July 2013 the NRA was only allowed to collect data from the USP with regard to procedures. Since 1 July 2013, an ordinance allows the NRA to collect data from all postal operators.

The NRA from the Czech Republic is empowered to collect data from all postal providers about all postal services since 1 January 2013. Before it only had powers to collect data from the USP within the scope of the universal service.

Additionally, in 2012 the NRAs of Luxembourg, Norway and Sweden did not have the power to collect data from the USP outside the scope of the universal service. In 2013, from 27 responses received, this was the case only of the NRA of Sweden.

- From other operators

In 2012, (from the 30 responses received) the NRAs of Austria, the Czech Republic, Norway and Cyprus did not have the power to collect data from alternative postal operators within the scope of the universal service.

In 2013, according to the responses received, 26 NRAs now have the power to collect this data from these operators.

This question is not applicable in the Netherlands and Finland, where postal items conveyed by a postal service provider other than the USP are not regarded as universal service products, or Serbia where other postal service providers are not allowed to provide services within the universal service.

In 2012, the NRAs from Austria, the Czech Republic, Cyprus, Norway, Sweden, Luxembourg, Spain, Switzerland and Serbia did not have the power to collect data from alternative postal service providers outside the scope of the universal service.

According to 27 answers received in 2013, in 2013 this is the situation only in Sweden.

## 5. Scope of services

There isn't a common scope of services considered as postal services among the ERGP members and observers. The scope of the universal service is also different from a country to another. As a consequence, some data presented concerning volumes, revenues, prices or market share are not directly comparable between countries. It is also relevant to point out that some countries do not make any difference between bulk and single piece mail, while in others this differentiation may be relevant, for instance to differentiate between postal items within or outside the scope of the universal service.

In order to address this issue and to avoid different interpretations of the definitions or answers provided by NRAs as well as having a better understanding of the answers provided by NRAs, the questionnaire aimed at collecting data on the postal sector by specifying the data that was expected. More particularly, the questionnaire was redefined to exclude express or unaddressed mail in certain questions and to ask NRAs to give a further explanation regarding the figures they provide (USP's only, only single piece mail, only bulk mail or both).

### a. Services included in the definition of postal services

Correspondence is considered as a postal service by all the countries. For a large majority of the countries, the definition of correspondence includes items up to 2 kg.

Table 4 shows the scope of services included in the definition of postal services in each country, in 2012 and in 2013.

**Table 4– Services included in the definition of postal services: 2012 and 2103**

| | Year 2012* | Year 2013*** |
|---|---|---|
| Items of correspondence (including direct mail) | AT, BE, HR, CH, CY, DK, EE, EL, ES, FI, FR, FY, DE, HU, IE, IT, LV, LT, LU, MT, NL, NO, PL, PT, RO, RS, SE, SK, SI, UK, | AT, BE, HR, CH, CY, DK, EE, EL, ES, FI, FR, FY, DE, HU, IE, IT, LV, LT, LU, MT, NL, NO, PL, PT, RO, RS, SE, SK, SI, UK, |
| Items of correspondence (excluding direct mail) | BG, CZ, RS | BG, CZ,RS |
| Books | AT, BE, BG, HR, CH, CY, DK, EL, ES, FR, FY, HU, DE**, IE, IT, LV, MT, NL, NO, PL, PT, RO, RS, SE, SK, SI, UK, | AT, BE, BG, HR, CH, CY, DK, EL, ES, FR, FY, HU, DE**, IE, IT, LU, LV, MT, NL, NO, PL, PT, RO, RS, SE, SK, SI, UK, |
| Catalogues | AT, BE, HR, CH, CY, DK, EE, EL, ES, FR, FY, HU, DE**, IE, IT, LV, MT, NO, PL, PT, RO, RS, SE, SK, SI, UK, | AT, BE, BG, HR, CH, CY, DK, EE, EL, ES, FR, FY, HU, DE**, IE, IT, LU, LV, MT, NO, PL, PT, RO, RS, SE, SK, SI, UK, |
| Newspapers | AT, BE, HR, CH, CY, DK, EE, EL, ES, FR, FY, HU, DE**, IE, IT, LV, MT, NL, NO, PL, PT, RO, RS, SE, SI, UK, | AT, BE, BG, HR, CH, CY, DK, EE, EL, ES, FR, FY, HU, DE**, IE, IT, LU, LV, MT, NL, NO, PL, PT, RO, RS, SE, SI, UK, |
| Periodicals | AT, BE, CH, CY, DE**, DK, EE, EL, ES, FR, FY, HR, HU, IE, IT, LV, MT, NL, NO, PL, PT, RO, RS, SE, SI, UK | AT, BE, BG, CH, CY, DE**, DK, EE, EL, ES, FR, FY, HR, HU, IE, IT, LU, LV, MT, NL, NO, PL, PT, RO, RS, SE, SI, UK |
| Postal parcels | AT, BE, BG, CH, CY, CZ, DE (up to 20kg), DK, EE, EL, FI, FR, FY, HR, HU, IE, IT, LV, LT, LU, MT, NL, NO, PL, PT, RS SE, SK, UK | AT, BE, BG, CH, CY, CZ, DE (up to 20kg), DK, EE, EL, ES, FI, FR, FY, HR, HU, IE, IT, LV, LT, LU, MT, NL, NO, PL, PT, RS SE, SI, SK, UK |
| Express mail | AT, BE, CH, CY, EE, EL, ES, FI, FY, DE, HR, HU, IT, LV, MT, NL, NO, PL, PT, RO, RS, SE, SK, SI | AT, BE, CH, CY, EE, EL, ES, FI, FY, DE, HR, HU, IT, LU, LV, MT, NL, NO, PL, PT, RO, RS, SE, SK, SI, UK |
| Unaddressed mail | EL, FY, IT, NO, PL, RS, UK | EL, IT, NO, PL, RS |

* Source: Report ERGP (12) 32.

** DE - If the delivery is undertaken by an operator that also delivers letters and/or parcels up to 20 kg.

*** Source: ERGP questionnaire of 2013.

## b. Services within the scope of the universal service

Tables 5 and 6 show the scope of services within the universal service, in 2012 and 2013.

The scope of the universal service seems to be quite different from one country to another. Even though the ERGP's task is to publish data on the whole market and not just the universal service, the scope of the universal service may have an influence on the availability of data as some NRAs only collect information from the US. Henceforth, any publication concerning the "universal service" at European level may tackle this difficulty.

Denmark, for instance, has in 2012 an extensive definition of the US (includes items of correspondence including direct mail, books, catalogues, newspapers, periodicals, postal parcels). On the other hand, Croatia has in 2012 a very limited scope of the universal service that only includes correspondence (excluding direct mail) and postal parcels. But the scope of the universal services does not have any influence on the availability of data as the Croatian NRA collects data inside and outside the universal service.

The only postal products that are part of the universal service in every country are single piece correspondence and standard single piece parcel.

**Table 5 – Services that fall within the universal service, year 2012**

| | | Country | Restricted to "non-bulk" |
|---|---|---|---|
| Items of correspondence*[6] | Domestic | AT**, BE, BG, HR, CY, CZ, DK, EE, FR, DE, EL, HU, IE, IT, LV, LT, LU, FI, FY, MT, NL, NO, PL, PT, RO, RS, SK, SI, ES, SE, CH, UK | BG, DK, EE, FI, NL, UK[a] |
| | International Outbound | AT **, BE , BG , CZ, HR, CY , DK , EE , FR , DE , EL , HU, IE, IT, LV , LT , LU, FI , FY , MT , NL , NO , PL , PT, RO , RS, SK , SI , ES , SE , CH, UK | BG, DK, EE, FI, UK[a] |
| | International Inbound | AT **, BE , BG , CZ, HR , CY , DK , EE , FR , DE, EL , HU , IE, IT, LV , LT , LU, FI , FY , MT , NL, NO , PL , PT, RO, RS, SK , SI , ES , SE , CH, UK | BG, DK, EE, FI, UK[a] |
| Books* | Domestic | AT **, BE, BG (up to 5 kg), CY , DK , EL ,FR , HU , IE, IT, MT, NO , PT, RO , RS, SE***, SK , SI , UK | UK[a] |
| | International Outbound | AT** , BE, BG (up to 5 kg), CY , DK , EL , FR, HU , IE, IT, MT, NO, NL (up to 5 kg), PT, RO, RS, SE***, SK , SI, UK | UK[a] |
| | International Inbound | AT** , BE, BG (up to 5 kg), CY, DK, EL , FR , HU, IE, IT, MT, NL (up to 5 kg), NO, PT, RO, RS, SE***, SK , SI, UK | UK[a] |
| Catalogues* | Domestic | AT** , BE, BG (up to 5 kg), CY, DK , EL , FR, HU , IE, IT, MT, NO , PT, RO, RS, SE***, SK, SI , UK | UK[a] |
| | International Outbound | AT* , BE, BG (up to 5 kg), CY, DK , EL , FR, HU, IE, IT, MT, NO, PT, RO, RS, SE***, SK , SI, UK | UK[a] |
| | International Inbound | AT** , BE, BG (up to 5 kg), CY , DK , EL, FR, HU, MT, NO , PT, RO, RS, SE***, SK , SI, UK | UK[a] |
| Newspapers* | Domestic | AT, BE, CH, DE, DK, EL, FR, HU, IE, IT, MT, NO, PT, RO, RS, SE***, SI | |
| | International Outbound | AT, BE, CH, DE DK, EL , FR, HU, IE, IT, MT, NO, PT, RO, RS, SE***, SI | |
| | International Inbound | AT, BE, CH, DE, DK, EL, FR, HU, IE, IT, MT, NO, PT, RO, RS, SE***, SI | |

[6] BG, CZ, EE, PT (since 27 April 2012), DE: excluding direct mail

| | | | |
|---|---|---|---|
| Periodicals* | Domestic | AT, BE, CH, DE, DK, EL, FR, HU, IE, IT, MT, NO , PT, RO , SE***, SI | |
| | International Outbound | AT, BE, CH, DE, DK, EL, FR, HU, IE, IT, MT, NO, PT, RO, RS, SE***, SI | |
| | International Inbound | AT, BE, CH, DE, DK, EL, FR, HU, IE, IT, MT, NO, PT, RO, RS, SE***, SI | |
| Postal parcels | Domestic | AT**, BE (up to 10 kg), BG (up to 20 kg), CH (up to 20 kg), CY (up to 20 kg), CZ, (up to 10 kg), DE (up to 20 kg), DK (up to 20 kg), EE (up to 20 kg), FI (up to 10 kg), FR (up to 20 kg), FY (up to 10 kg), EL (up to 20 kg), ES (up to 20 kg), HR (up to 10 kg), HU (up to 20 kg), IE (up to 20 kg), IT (up to 20 Kg), LV (up to 20 kg), LT (up to 10 Kg), LU (up to 20 kg), MT (up to 20 kg),NL (up to 10 kg), NO (up to 20 kg), PL (up to 10 kg), PT (until 26 April 2012: up to 20kg) (since 27 April 2012: up to 10kg), RO, RS(up to 10 kg), SE (up to 20 kg), SI, SK ((until 31.12.2012: up to 15 kg), UK (up to 20 kg) | EE, FI, FR, NL, NO, UK[a] |
| | International Outbound | AT**, BE (up to 10 kg), BG, CH, CY (up to 20 kg), CZ (up to 10 kg), DE (up to 20 kg), DK, EE (up to 20 kg), FI (up to 10 kg), FR (up to 20 kg), FY (up to 10 kg),EL, ES (up to 20 kg), HR (up to 10 kg), HU (up to 20 kg), IE, IT (up to 20 Kg), LV (up to 20 kg), LT (up to 10 kg), LU, MT (up to 20 kg), NL (up to 20 kg), NO (up to 20 kg), PL (up to 10 kg), PT (until 26 April 2012: up to 20kg) (since 27 April 2012: up to 10kg), RO (up to 10 kg), RS(up to 10 kg), SE (up to 20 kg), SI (up to 10 kg), SK (up to 15 kg), UK (up to 20 Kg) | EE, FI, FR NO, UK[a] |
| | International Inbound | AT (up to 10 kg)**, BE, BG, CH, CY(up to 20 kg), CZ (up to 10 kg), DE (up to 20 kg), DK, EE, FI (up to 20 Kg), FR (up to 20 kg), FY (up to 10 kg),EL, ES, HR, HU(up to 20 kg), IE, IT (up to 20 Kg), LV, LT (up to 20 Kg if intra-European), LU, MT (up to 20 kg), NL (up to 20 kg), NO, PL, PT (until 26 April 2012: up to 20kg) (since 27 April 2012: up to 10kg****), RO, RS(up to 20 kg), SE, SI (up to 20 kg), SK (up to 20 kg), UK (up to 20 kg) | EE, FI, FR, NO, UK[a] |
| Express mail | Domestic | CY | |
| | International Outbound | CY | |
| | International Inbound | CY | |

* Up to 2Kg, unless otherwise stated.

** AT - Restricted to items which are deposited in distribution centres.

*** SE on condition that they are contained in an envelope or other kind of wrapping, featuring a postal address.

[a] – Bulk services were removed from the USO in UK in summer of 2011.

**** PT - For Inbound international parcels with origin in the Members States of the European Union, the weight limit continues to be 20Kg. For parcels incoming from other countries, the new weight limit is 10Kg.

**Table 6 – Services that fall within the universal service, year 2013**

| | | Country | Restricted to "non-bulk" |
|---|---|---|---|
| Items of correspondence*[7] | Domestic | AT**, BE, BG, DE, CY, CZ, DK, EE, EL, FR, HR, HU, IE, IT, LV, LT, LU, FI, FY, MT, NL, NO, PL, PT, RO, RS, SK, SI, ES, SE, CH, UK | BG, DK, EE, FI, LT, NL, UK[a] |
| | International Outbound | AT **, BE , BG , CZ, CY , DK , EE,EL, FR, DE , FI, FY, HR, HU, IE, IT, LV, LT , LU, MT, NL , NO, PL , PT, RO , RS, SK , SI , ES , SE , CH, UK | BG, DK, EE, FI, LT, UK[a] |
| | International Inbound | AT **, BE , BG , CZ, HR , CY , DE, DK , EE , FR , EL , HU , IE, IT, LV , LT , LU, FI , FY , MT , NL, NO , PL , PT, RO, RS, SK , SI , ES , SE , CH, UK | BG, DK, EE, FI, LT, UK[a] |
| Books* | Domestic | AT **, BE, BG (up to 5 kg), CY , DK , EL ,FR, FY, HU , IE, IT, LU (up to 2 kg), MT, NO , PT, RO , RS, SE***, SK , SI , UK | UK[a] |
| | International Outbound | AT** , BE, BG (up to 5 kg), CY , DK , EL , FR, FY, HU , IE (up to 5 kg), IT, LU (up to 2 kg),, MT, NO, NL (up to 5 kg), PT, RO, RS, SE***, SK , SI, UK | UK[a] |
| | International Inbound | AT** , BE, BG (up to 5 kg), CY, DK, EL , FR , HU, IE, IT, LU (up to 2 kg),MT, NL (up to 5 kg), NO, PT, RO, RS, SE***, SK , SI, UK | UK[a] |
| Catalogues* | Domestic | AT** , BE, BG (up to 5 kg), CY, DK , EL , FR, FY, HU , IE, IT, LU (up to 2 kg), MT, NO , PT, RO, RS, SE***, SK, SI , UK | UK[a] |
| | International Outbound | AT* , BE, BG (up to 5 kg), CY, DK , EL , FR, FY, HU, IE, IT, LU (up to 2 kg),MT, NO, PT, RO, RS, SE***, SK , SI, UK | UK[a] |
| | International Inbound | AT** , BE, BG (up to 5 kg), CY , DK , EL, FR, FY, HU,IE, LU (up to 2 kg),MT, NO , PT, RO, RS, SE***, SK , SI, UK | UK[a] |
| Newspapers* | Domestic | AT, BE, CH, DE, DK, EL, FR, FY, HU, IE, IT, LU (up to 2 kg), MT, NO, PT, RO, RS, SE***, SI | |
| | International Outbound | AT, BE, CH, DE DK, EL , FR, FY, HU, IE, IT, LU (up to 2 kg),, MT, NO, PT, RO, RS, SE***, SI | |
| | International Inbound | AT, BE, CH, DE, DK, EL, FR, FY, HU, IE, IT, LU (up to 2 kg),MT, NO, PT, RO, RS, SE***, SI | |
| Periodicals* | Domestic | AT, BE, CH, DE, DK, EL, FR, HU, IE, IT, LU (up to 2 kg), MT, NO , PT, RO , SE***, SI | |
| | International Outbound | AT, BE, CH, DE, DK, EL, FR, HU, IE, IT, LU (up to 2 kg), MT, NO, PT, RO, RS, SE***, SI | |
| | International Inbound | AT, BE, CH, DE, DK, EL, FR, HU, IE, IT, LU (up to 2 kg), MT, NO, PT, RO, RS, SE***, SI | |

[7] BG, CZ, EE, PT (since 27 April 2012), DE: excluding direct mail

| | | | |
|---|---|---|---|
| Postal parcels | Domestic | AT**, BE (up to 10 kg), BG (up to 20 kg), CH (up to 20 kg), CY (up to 20 kg), CZ, (up to 10 kg), DE (up to 20 kg), DK (up to 20 kg), EE (up to 20 kg), FI (up to 10 kg), FR (up to 20 kg), FY (up to 20 kg), EL (up to 20 kg), ES (up to 20 kg), HR (up to 10 kg), HU (up to 20 kg), IE (up to 20 kg), IT (up to 20 Kg), LV (up to 20 kg), LT(up to 10 kg), LU (up to 10 kg), MT (up to 20 kg),NL (up to 10 kg), NO (up to 20 kg), PL (up to 10 kg), PT (up to 10kg), RO, RS(up to 10 kg), SE (up to 20 kg), SI (up to 15 kg), SK (up to 10 kg), UK (up to 20 kg) | EE, FI, FR, LT, NL, NO, UK[a] |
| | International Outbound | AT**, BE (up to 10 kg), BG, CH, CY (up to 20 kg), CZ (up to 10 kg), DE (up to 20 kg), DK, EE (up to 20 kg), FI (up to 10 kg), FR (up to 20 kg), FY (up to 20 kg),EL, ES (up to 20 kg), HR (up to 10 kg), HU (up to 20 kg), IE (up to 20 kg), IT (up to 20 Kg), LV (up to 20 kg), LT (up to 10 kg), LU(up to 10 kg), MT (up to 20 kg), NL (up to 20 kg),NO (up to 20 kg), PL (up to 10 kg), PT (up to 10kg), RO (up to 10 kg), RS(up to 10 kg), SE (up to 20 kg), SI (up to 10 kg), SK (up to 10kg), UK (up to 20 Kg) | EE, FI, FR LT, NO, UK[a] |
| | International Inbound | AT (up to 10 kg)**, BE, BG, CH, CY(up to 20 kg), CZ (up to 10 kg), DE (up to 20 kg), DK, EE, FI ((up to 20 kg), FR (up to 20 kg), FY (up to 20 kg),EL, ES, HR, HU(up to 20 kg), IE (up to 20 kg), IT (up to 20 Kg), LV,LT (up to 20 kg if intra-European), LU (up to 20 kg), MT (up to 20 kg), NL (up to 20 kg), NO, PL, PT (up to 10kg****), RO, RS(up to 20 kg), SE, SI (up to 20 kg), SK (up to 20 kg), UK (up to 20 kg) | EE, FI, FR, LT, NO, UK[a] |
| Express mail | Domestic | CY, FY (up to 2 kg) | |
| | International Outbound | CY, FY (up to 2 kg) | |
| | International Inbound | CY, FY (up to 2 kg) | |

* Up to 2Kg, unless otherwise stated.

** AT - Restricted to items which are deposited in distribution centres.

*** SE on condition that they are contained in an envelope or other kind of wrapping, featuring a postal address.

[a] – Bulk services were removed from the USO in UK in summer of 2011.

**** PT - For Inbound international parcels with origin in the Members States of the European Union, the weight limit continues to be 20Kg. For parcels incoming from other countries, the new weight limit is 10Kg.

## c. Changes in the universal service

According to the answers given by NRAs to the questionnaires in 2013, there have been changes in the definition of the universal service in the last three years and other changes are foreseen. In three countries, all bulk mail or some bulk mail were removed from the scope of the universal service.

A change is foreseen in NL. The number of delivery days could be decreased from 6 days to 5 days a week.

Overall, most of those changes consist of a reduction of the scope of the universal service.

**Table 7 – Changes in USO**

| Countries | Changes in the last three years |
|---|---|
| IE | Following the enactment of the Communications Regulation (Postal Services) Act 2011 and the publication by the Irish NRA of the ‘Postal Regulatory Framework’ (ComReg Document 12/81) on 27 July 2012, the specification of the universal postal services were reduced.” |
| FI | From 1. June 2011 the scope of USO services was limited to only cash paid letters and parcels (up to certain weight limits). |
| LT | Bulk services were removed from the USO in 2013. |
| PL | According to the new law – since 1 January 2013 bulk mail is outside the scope of the universal service. |
| PT | Services are no longer within the universal service, since 27 April 2012:<br>- Direct mail;<br>- Domestic parcels weighing between more than 10Kg;<br>- International outbound parcels weighing more than 10Kg<br>- Inbound international parcels with origin from countries outside the European Union, weighing more than 10Kg. |
| SK | The scope of USO was reduced (domestic parcels from 15 kg to 10 kg) since January 2013 |
| UK | Bulk services were removed from the USO in UK in the summer of 2011 |
| EL | According to the new Greek postal law (of 2012): USP as well as any other PSP who is operating within US spectrum must publish on an annual basis a consumer complaint report presenting the number as well as the way complaints have been handled. |
| FR | Introduction of a new product in D+2 that is supposed, according to the USP, to become a major product of the USO for single piece items. |
| | **Changes foreseen in the future** |
| NL | There are proposals before Parliament at the moment that may come into force in the beginning of 2014. Proposals entail in particular the reduction of number of delivery/collection days from 6 to 5. |

## 6. Licences and authorisations

Countries have implemented different systems for regulating entrants to the market. Table 8 shows the situation in 2013.

**Table 8– Licence and authorisation procedures implemented**

| | Authorisation / Registration* | Licence* | None |
|---|---|---|---|
| Required to provide services within the scope of US | AT[a], CH, CZ[b], DE[c], DK, FY, IE, LT, LV, PL, RO, SK. | AT[a], BE, BG, DE[c], EL, ES, FR, HR, HU[g], IT, LU, MT, PT[d], RS, SE, SI, SK[f] ,FI[h] | NL, UK. |
| Required to provide services outside the scope of US (non-US) | AT, BG, CH, CZ, DE[c], EL, ES, HR, HU[g], IE, IT, LT, LU, LV, MT, PL, PT[d] , RO, RS, SI[e] ,SK. | DE[c], DK, FI[h], FR, FY, SE. | BE, NL, UK. |

* Definition in the Postal Directive, article 2, nr. 14.

[a] Licence is necessary for letter post < 50g.

[b] All postal service providers, no matter if they offer US or non-US, have obligation to announce their business to the NRA that issues confirmation after this registration. Only the USP has special Licence confirming special duties and rights for offering US. This obligation is in force since 1st January 2013.

[c] Operators who forward items of correspondence up to 1.000 g require a licence. For all other postal service providers registration is required.

[d] The USP does not require a licence or a registration.

[e] Services outside the scope of universal service: authorization applies only to providers of interchangeable service, for other providers of postal services the notification (in writing or by e-mail) to APEK applies.

[f] The Postal licence is required only for universal service providing.

[g] License is necessary for postal services substituting for the universal postal service. Authorisation / Registration is necessary for postal services not substituting for universal postal services. Only the USP has special contract confirming special duties and rights offering US. There are 3 categories of postal items: 1. US (offered by the USP), 2. Postal services substituting for the universal postal services (offered by the USP on registration and license holders) and 3. Postal services not substituting for universal postal services (offered by notified providers). This system for entries on the market is in force since 1st January 2013.

[h] A licence is required for postal operations that concern items of correspondence.

## 7. Market outcomes indicators

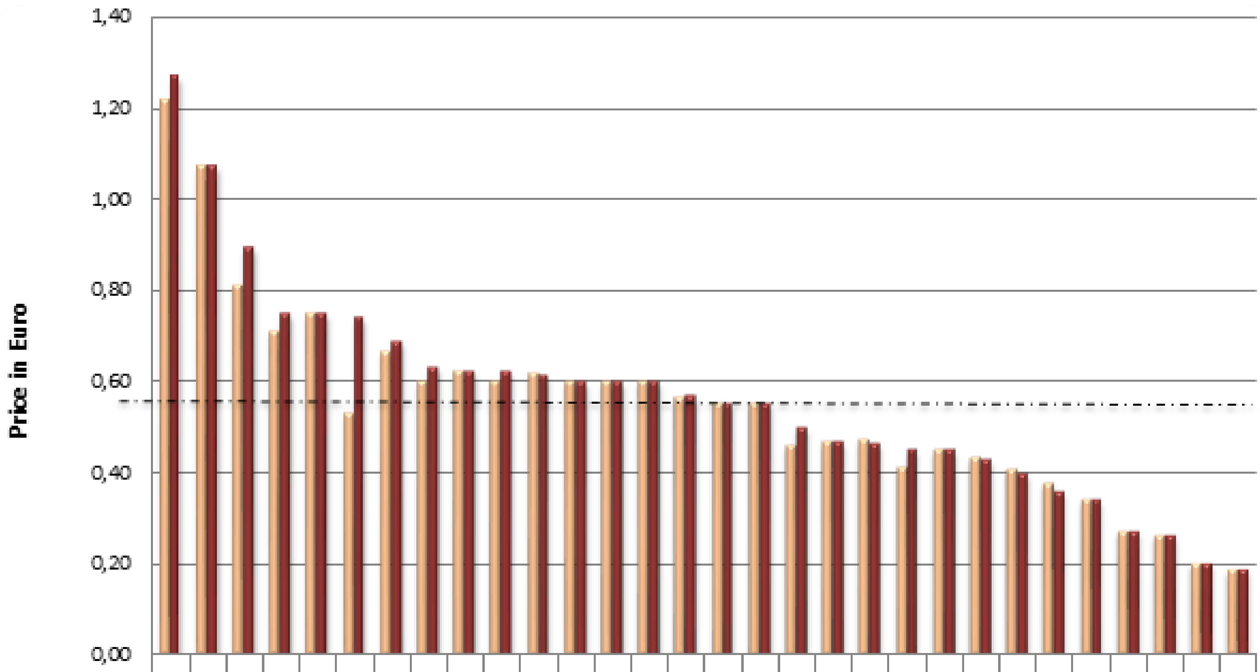
### Prices of domestic standard postal items provided by the USP/Incumbent at single piece tariff for typical residential customers

In 2012, the average price in Europe for posting a priority letter weighing less than 20 gr. within a country (domestic letter) was 0.56€, a slight increase on 2011 (avg. price 0,55€). Among the 30 countries considered (Figure 1), Norway, as in 2011, was the country with the highest price (1,27€), while Serbia, same as in 2011, was the country with the lowest domestic priority letter price (0,19€). It should, however, be clarified that the price changes of 2012 compared to 2011, illustrated in figure 1, for Norway, Switzerland, Croatia, Czech Republic, Romania and Sweden occur only due to exchange rate fluctuation (conversion of local currencies to euro) and not due to actual price increase or decrease. Six countries out of 30 have actually increased the price of priority letter in 2012: Belgium, France, Greece, Hungary, the Netherlands and the United Kingdom.

Cyprus, Czech Republic, Germany, Ireland, Lithuania and Switzerland are countries that have not changed priority letter pricing over the last five years (2008-2012). Furthermore, the Former Yugoslav Republic of Macedonia and Poland are the only countries that have decreased the price of this service during the last five years (2008-2012).

Letter post pricing does not include V.A.T. in all countries, except for Sweden.

**Figure 1 – Price of domestic priority letter weighing less than 20gr (in Euro)**




| | NO | DK | CH | BE | FI | UK | SE | FR | AT | EL | HR | IT | SK | LU | LV | IE | DE | NL | PT | PL | HU | LT | BG | CZ | RO | CY | SI | FY | MT | RS |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2011 | 1,22 | 1,07 | 0,81 | 0,71 | 0,75 | 0,53 | 0,66 | 0,60 | 0,62 | 0,60 | 0,62 | 0,60 | 0,60 | 0,60 | 0,57 | 0,55 | 0,55 | 0,46 | 0,47 | 0,47 | 0,41 | 0,45 | 0,43 | 0,41 | 0,38 | 0,34 | 0,27 | 0,26 | 0,20 | 0,19 |
| 2012 | 1,27 | 1,07 | 0,89 | 0,75 | 0,75 | 0,74 | 0,69 | 0,63 | 0,62 | 0,62 | 0,61 | 0,60 | 0,60 | 0,60 | 0,57 | 0,55 | 0,55 | 0,50 | 0,47 | 0,47 | 0,45 | 0,45 | 0,43 | 0,40 | 0,36 | 0,34 | 0,27 | 0,26 | 0,20 | 0,19 |

-.-.-.. Avg. Price 2012: 0.56€

Notes:

1. First Class: For services to be delivered in the majority of the Member State on the following working day (according to the service conditions published or informed by the postal service provider). Corresponds to the service usually provided in the scope of the universal service, if applicable.
2. Prices are in Euro, at 1 July of each year.
3. Exchange rates used for currency conversions of the countries not using the Euro as national currency:

   Eurostat - Euro/ECU exchange rates - Annual data [ert_bil_eur_a]

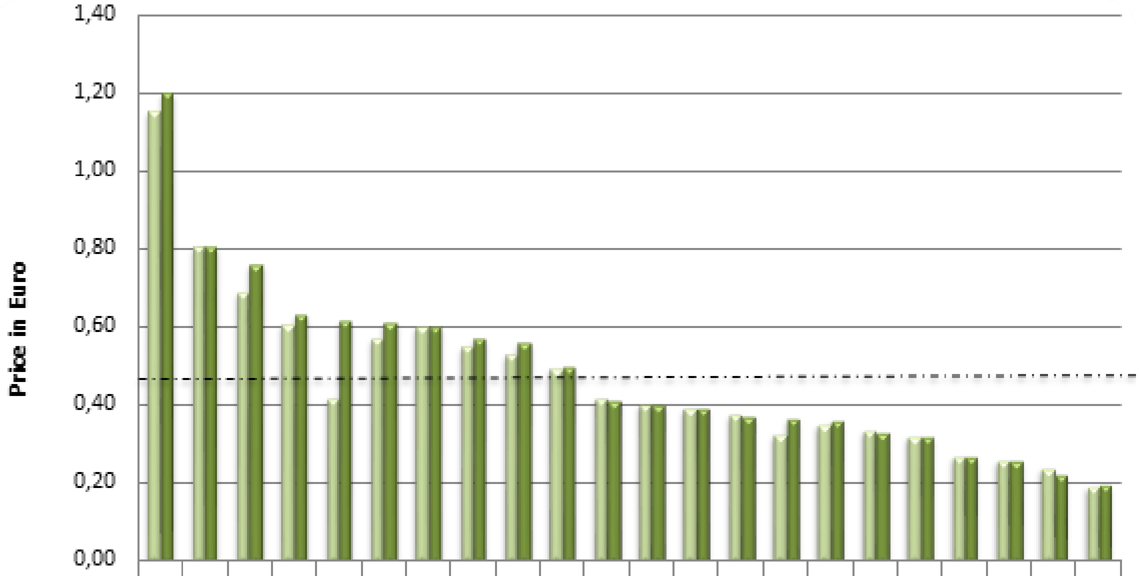
   (http://epp.eurostat.ec.europa.eu/portal/page/portal/exchange_rates/data/database).
4. For countries not using the Euro as national currency, variations in (Euro) price may result from variations of the exchange rate.
5. HU: Price is for letter weight up to 30gr.
6. UK: Price is for letter weight up to 100gr.
7. PL: Price is for letter weight up to 350gr.
8. SE: VAT applied.
9. Average Price for 2012 is calculated based on data received by the 29 countries that offer priority letter post service and have provided pricing data for 2012.

Regarding the domestic non-priority letter weighing less than 20 gr, it should be highlighted that this service is not offered by some countries, namely Austria, Cyprus, Czech Republic, Germany, Ireland, Italy, Luxembourg, Malta and the Netherlands. Among countries that offer a non-priority letter post service and have contributed to this report by sending pricing data, Norway, as in 2011, was the country with the highest price (1,20€) in 2012. However, it should be highlighted, again, that the price changes in 2012 compared to 2011 for Norway, Switzerland, Sweden, Croatia, Poland and Romania illustrated in figure 2, occurs only because of the exchange rate fluctuation. Serbia – same as with priority letter mail – remains the country with the lowest price (0,19€). The average price of domestic non-priority letters in 2012 is 0,49€, an increase compared to 2011 (avg. price 0,47€).

An actual price increase for this postal service occurred in 2012 in six out of 21 countries that offer this service: Belgium, Greece, France, Spain, Hungary and the United Kingdom. Over the past five years (2008-2012), Switzerland along with Lithuania, are the only countries that have not changed the price of this letter service.

Three countries, the Former Yugoslav Republic of Macedonia, Serbia and Slovenia, do not differentiate their pricing of priority and non-priority mail, offering both services at the same price.

**Figure 2 – Price of domestic non-priority letter weighing less than 20gr (in Euro)**




| | NO | DK | CH | SE | UK | BE | FI | EL | FR | LV | HR | SK | LT | PL | HU | ES | BG | PT | SI | FY | RO | RS |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2011 | 1,15 | 0,81 | 0,69 | 0,61 | 0,41 | 0,57 | 0,60 | 0,55 | 0,53 | 0,50 | 0,42 | 0,40 | 0,39 | 0,38 | 0,32 | 0,35 | 0,33 | 0,32 | 0,27 | 0,26 | 0,24 | 0,19 |
| 2012 | 1,20 | 0,81 | 0,76 | 0,63 | 0,62 | 0,61 | 0,60 | 0,57 | 0,56 | 0,50 | 0,41 | 0,40 | 0,39 | 0,37 | 0,36 | 0,36 | 0,33 | 0,32 | 0,27 | 0,26 | 0,22 | 0,19 |

Avg. Non-Priority Letter Price 2012: 0.49€

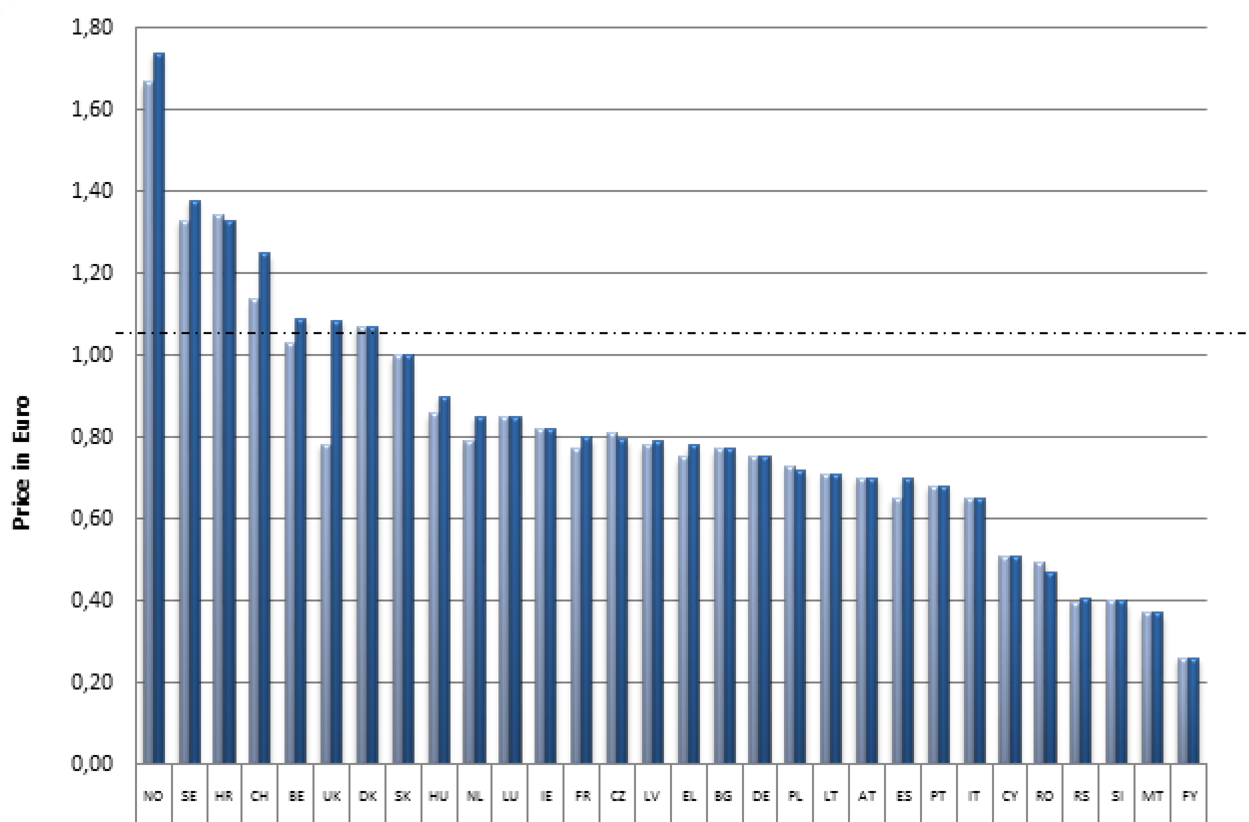
Notes:

1. For services to be delivered in the majority of the Member State until 3 working days after posting (according to the service conditions published or informed by the postal service provider). Corresponds to the service usually provided as universal service, if applicable.
2. Prices in Euro, at 1 July of each year.
3. Exchange rates used for currency conversions of the countries not using the Euro as national currency: Eurostat - Euro/ECU exchange rates - Annual data [ert_bil_eur_a] (http://epp.eurostat.ec.europa.eu/portal/page/portal/exchange_rates/data/database).
4. CH: there was actually no letter price increase in this country; however price increase is appeared in the graph due to exchange rate in 2012 vs 2011.
5. For countries not using the Euro as national currency, variations in (Euro) price may result from variations of the exchange rate.
6. HU: Price is for letter weight up to 30gr.
7. UK: Price is for letter weight up to 100gr.
8. PL: Price is for letter weight up to 350gr.
9. Non-priority letter post not applicable in AT, CY, CZ, DE, IE, IT, MT, NL
10. ES: in Spain there is only one category of letter post without differentiation between ‘priority’ and ‘non-priority’ service

Regarding the international letter price (within Europe’s zone) for letter weighing less than 20 gr, Norway has the highest price (1,74 €) among the countries that have provided that pricing information (30 countries) while the Former Yugoslav Republic of Macedonia remains the lowest priced country (0,26€) for this service in 2012.

An actual price increase occurred in seven out of 30 countries: Belgium, France, Greece, Hungary, Spain, the Netherlands and the United Kingdom. In particular, the United Kingdom is the country with the highest price increase (+29.4%) on that service in 2012 compared to 2011.

**Figure 3 - International letter pricing weighing less than 20 gr, within Europe's zone (in Euro)**




| | NO | SE | HR | CH | BE | UK | DK | SK | HU | NL | LU | IE | FR | CZ | LV | EL | BG | DE | PL | LT | AT | ES | PT | IT | CY | RO | RS | SI | MT | FY |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2011 | 1,67 | 1,33 | 1,34 | 1,14 | 1,03 | 0,78 | 1,07 | 1,00 | 0,86 | 0,79 | 0,85 | 0,82 | 0,77 | 0,81 | 0,78 | 0,75 | 0,77 | 0,75 | 0,73 | 0,71 | 0,70 | 0,65 | 0,68 | 0,65 | 0,51 | 0,50 | 0,40 | 0,40 | 0,37 | 0,26 |
| 2012 | 1,74 | 1,38 | 1,33 | 1,25 | 1,09 | 1,09 | 1,07 | 1,00 | 0,90 | 0,85 | 0,85 | 0,82 | 0,80 | 0,80 | 0,79 | 0,78 | 0,77 | 0,75 | 0,72 | 0,71 | 0,70 | 0,70 | 0,68 | 0,65 | 0,51 | 0,47 | 0,41 | 0,40 | 0,37 | 0,26 |

Avg. International Letter Price in 2012: 0.82€

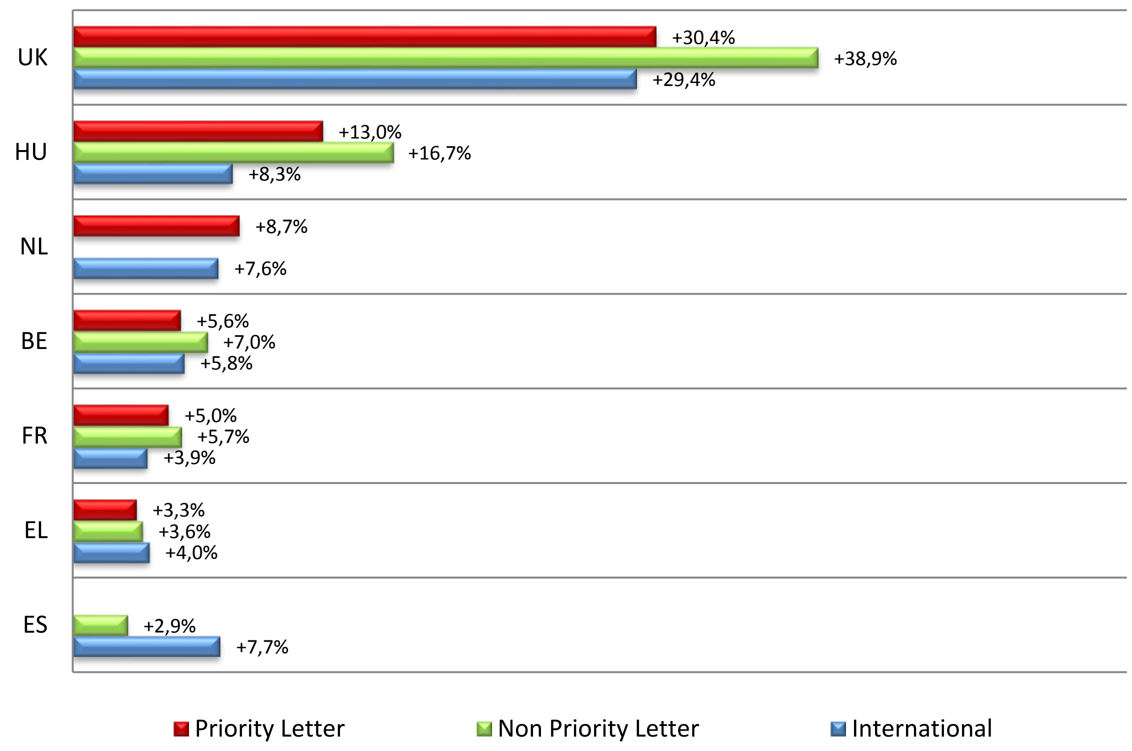
Notes:

1. Prices in Euro, at 1 July of each year.
2. Exchange rates used for currency conversions of the countries not using the Euro as national currency: Eurostat - Euro/ECU exchange rates - Annual data [ert_bil_eur_a]

   (http://epp.eurostat.ec.europa.eu/portal/page/portal/exchange_rates/data/database).
3. PL: Price is for letter weight up to 50gr.

In 2012, as indicated in figure 4, the incumbents in seven of the 30 countries which have shared pricing data for this study, increased the price for a priority domestic letter. Four out of these six countries have also increased the price of the non-priority domestic letter service. The highest proportional price increase on domestic stamped letter prices was in the UK for both letter services (priority and non-priority), followed by Hungary, the Netherlands (only for priority letter, as a non-priority letter service is not offered in this country), Belgium, France, Greece and Spain.

**Figure 4 – Annual price Increase of domestic & international letter post per country, 2012 vs 2011 (%)**




Notes:

1. For calculating the annual price changes, national currency per country is used so as to extinguish any exchange rate differences between 2011 & 2012, since, primarily, the objective is to present the annual price change per country and secondarily the comparison between countries as regards to price changes.
2. Annual Price comparison calculates the price on 1st of July 2012 vs the price on 1st of July 2011.

## 8. Market structure indicators

The quantitative data presented below aim to provide a better understanding of the structure of the postal market in Europe as well as pointing out any possible differentiations among countries regarding postal statistics.

### a. Number of active postal service providers

As regards to active postal service providers (PSP), additional information is provided for 2012, indicating the number of active PSP operating as 'express' and 'non-express' providers per country.

**Table 9 – Total number of active postal service providers**

| | 2011 | 2012 | 2012 non-express | 2012 express | Notes |
|---|---|---|---|---|---|
| Austria | 13 | 18 | 10 | 8 | |
| Belgium | na | na | na | na | c) |
| Bulgaria | na | na | 6 | 56 | |
| Croatia | 23 | 21 | 1 | 20 | |
| Cyprus | 20 | 22 | 1 | 22 | a) |
| Czech Republic | 1 | 1 | 1 | na | b) |
| Denmark | 5 | 8 | 8 | na | |
| Finland | 2 | 2 | 2 | na | g) |
| France | 25 | 32 | 32 | na | |
| FYROM | 26 | 19 | 1 | 19 | a) |
| Germany | na | na | na | na | c) |
| Greece | 501 | 484 | 8 | 476 | |
| Hungary | 268 | 289 | 1 | 289 | a) |
| Ireland | 27 | 26 | | | d) |
| Italy | na | na | na | na | c) |
| Latvia | 41 | 48 | 6 | 42 | |
| Lithuania | 55 | 54 | 54 | na | |
| Luxembourg | 23 | 22 | na | 22 | |
| Malta | 19 | 19 | 3 | 19 | a) |
| Norway | na | na | na | na | c) |
| Poland | 155 | 154 | | | e) |
| Portugal | 60 | 61 | 10 | 52 | a) |
| Romania | 214 | 227 | 176 | 51 | |
| Serbia | 47 | 50 | 1 | 49 | |
| Slovakia | 24 | 22 | 9 | 16 | |
| Slovenia | 16 | 16 | 5 | 11 | |
| Spain | na | na | na | na | c) |
| Sweden | 27 | 31 | 31 | na | |
| Switzerland | 30 | 72** | 72 | na | |
| The Netherlands | 135 | 135 | 135 | na | |
| United Kingdom | 17 | 18 | 18 | f) | f) |

* This number refers only to PSPs that have a license
** New legislation since 2012 (data not comparable to 2011)

Notes:

a) postal service provider(s) in "non-express" column provides also "express" services and is reported twice in both "non-express" and "express" column of 2012. This is the reason year 2012 in total, differs from the sum of "non-express" and "express" of 2012.

b) Czech Republic Telecommunication Office has data only about the USP

c) not available' (na) implies that there are no data from the country and not non availability or no existence of the PSP category

d) this represents the number of postal service providers in June 2012. Following the enactment of the Communications Regulation (Postal Services) Act 2011 and the publication by the Irish NRA of the 'Postal Regulatory Framework' (ComReg Document 12/81) on 27 July 2012, the number of authorised postal service providers, at the time of publishing of this report, has reduced to six (6).

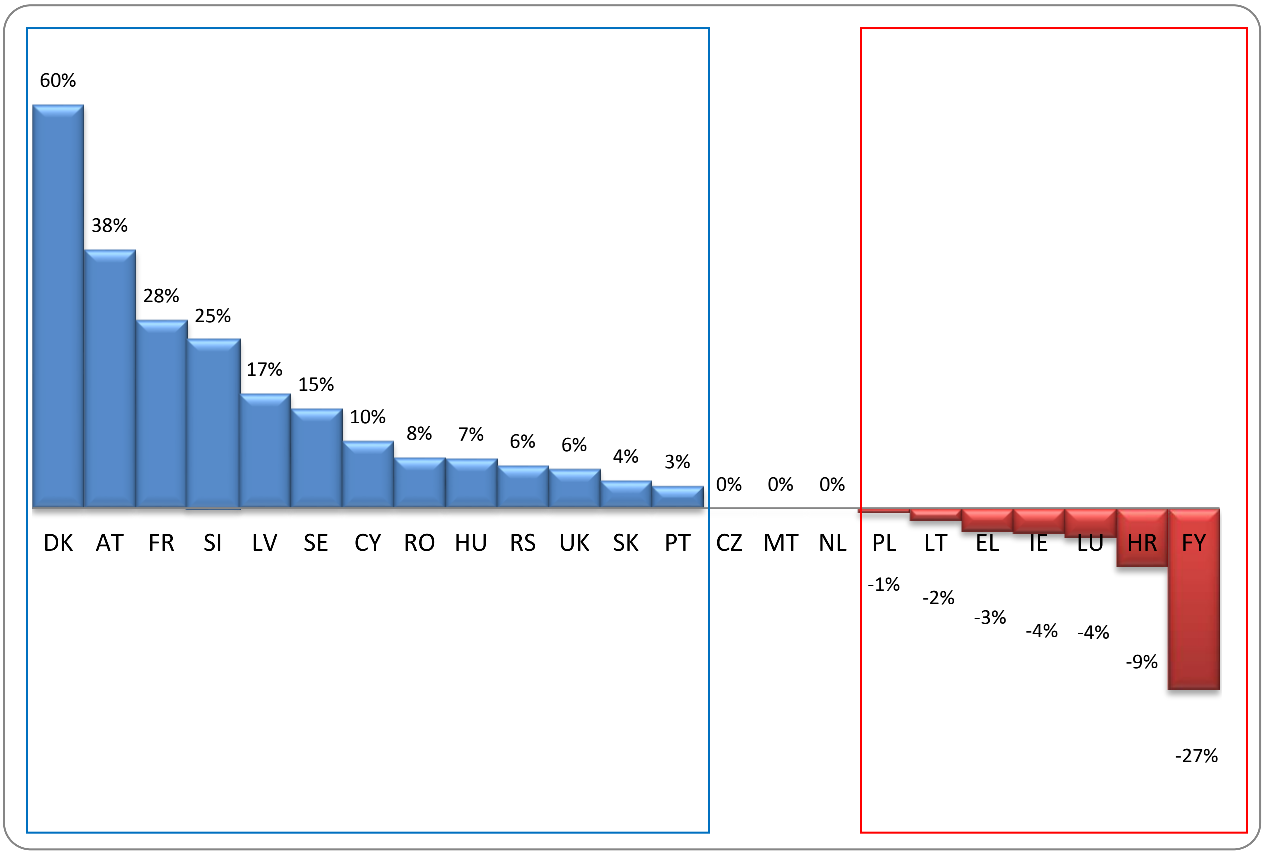
e) not required to differentiate authorization based on service provision

f) data not to be disclosed

g) Finland: The numbers refer only to postal service providers that have a licence

There are generally two clusters of countries regarding the evolution of the number of active postal service providers, as indicated in figure 6. Denmark is the country with the highest increase in new active PSPs that were added in 2012, followed by Austria, France, Slovenia, Latvia, Sweden, Cyprus, Hungary, Serbia, United Kingdom, Slovakia and Portugal. On the other hand, the Former Yugoslav Republic of Macedonia is the country with the greatest decrease in that indicator, followed by Croatia, Luxembourg, Ireland, Greece, Lithuania, and Poland.

**Figure 5 – Annual changes of Active Postal Service Providers per country, 2012 vs 2011 (%)**



## Indicators on the level of market concentration

The Herfindahl-Hirschman index presented on table 10, shows that the postal market in all of the countries mentioned below, is highly concentrated (HHI> 2500). There are two cases (Czech Republic and the United Kingdom) where it appears that the postal market has reached almost the maximum (=10.000) of this index. This may be because these two countries have reported data only for the USP (and not for express mail companies that may exist).

**Table 10 – Herfindahl-Hirschman Index (HHI) on the level of market concentration**

| | HHI - a) Volumes | | | HHI - b) Revenues | | |
|---|---|---|---|---|---|---|
| | **2011** | **2012** | **Tendency** | **2011** | **2012** | **Tendency** |
| **Croatia** | 5.523 | 5.045 | Decrease | 5.324 | 5.015 | Decrease |
| **Czech Republic** | 10.000 | 10.000 | Stable | 10.000 | 10.000 | Stable |
| **FYROM** | 9.803 | 9.802 | Decrease | 5.283 | 6.261 | Increase |
| **Greece** | 8.105 | 8.004 | Decrease | 3.580 | 3.373 | Decrease |
| **Hungary** | 9.429 | 9.375 | Decrease | 5.109 | 5.327 | Increase |
| **Latvia** | 7351 | 6617 | Decrease | 4371 | 3861 | Decrease |
| **Lithuania** | 4.517 | 4.439 | Decrease | 2.286 | 2.149 | Decrease |
| **Malta** | 9.746 | 9.613 | Decrease | 4.174 | 4.230 | Increase |
| **Netherlands** | 6.777 | 7.178 | Increase | 8.154 | 8.362 | Increase |
| **Poland** | 7.700 | 7.400 | Decrease | 5.900 | 5.700 | Decrease |
| **Portugal** | 9.429 | 9.225 | Decrease | 5.337 | 4.128 | Decrease |
| **Serbia** | 9.478 | 9.463 | Decrease | 4.904 | 4.603 | Decrease |
| **Slovakia** | 7.233 | 7.150 | Decrease | 3.821 | 3.214 | Decrease |
| **Sweden** | 7.840 | 7.750 | Decrease | 8.750 | 8.670 | Decrease |
| **UK** | 9.990 | 9.977 | Decrease | 9.996 | 9.993 | Decrease |
| **Italy** | na | 5.750 | - | na | 7.149 | - |

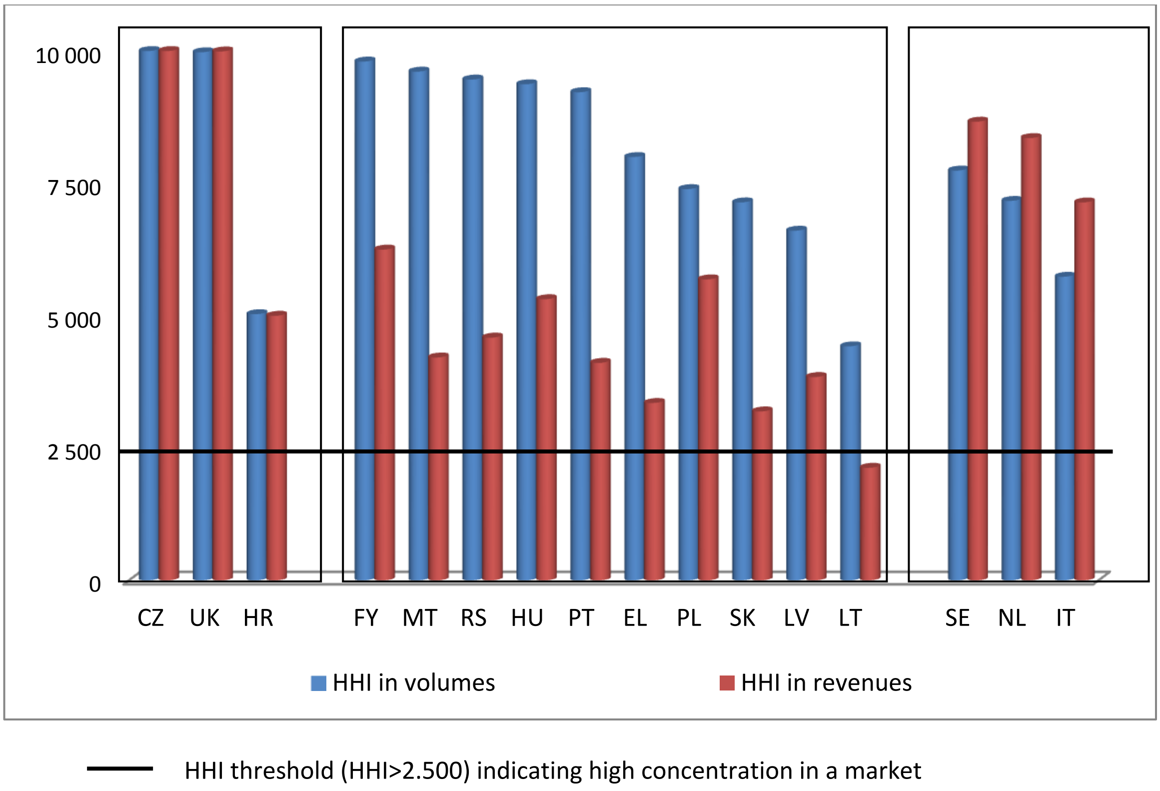
Notes:

This indicator is the sum of the square of the market shares of the postal service providers. The higher its value, the higher the concentration of the market is. General interpretation of HHI:

- above 2000, indicates a concentrated market;
- between 1000 and 2000, indicates a moderate concentrated market.

Countries that have submitted data on that index, could be clustered in three broad categories, as indicated on figure 7: those that HHI in volume aligns with HHI in value (Czech Republic, the United Kingdom and Croatia), those such as the Former Yugoslav of Macedonia, Malta, Serbia, Hungary, Portugal, Greece, Poland, Slovakia, Latvia and Lithuania in which the HHI of postal volume is significantly higher than the HHI of postal revenues and the last cluster of those countries where the HHI of postal revenues is higher than the level of concentration of postal volume – Sweden, Italy and the Netherlands.

**Figure 6 – Average Herfindahl-Hirschman Index**




There is a great differentiation among countries, regarding the postal service providers that have a volume or value market share more than 1% in the postal market (table 11).

**Table 11 – Number of postal service providers with more than 1% of the total postal market**

| | >1% - Based on volumes | | | >1% - Based on revenues | | |
|---|---|---|---|---|---|---|
| | **2011** | **2012** | **Trend** | **2011** | **2012** | **Trend** |
| **Belgium** | na | na | - | 8 | 8 | Stable |
| **Croatia** | 3 | 4 | Increase | 7 | 8 | Increase |
| **Cyprus** | 1 | 1 | Stable | 1 | 1 | Stable |
| **Czech Republic** | 1 | 1 | Stable | 1 | 1 | Stable |
| **France** | 1 | 1 | Stable | 1 | 1 | Stable |
| **FYROM** | 26 | 19 | Decrease | 26 | 19 | Decrease |
| **Germany** | **na** | na | - | na | na | - |
| **Greece** | 5 | 5 | Stable | 8 | 8 | Stable |
| **Hungary** | 1 | 1 | Stable | 15 | 8 | Decrease |
| **Ireland** | 1 | 1 | Stable | 1 | 1 | Stable |
| **Italy** | na | na | - | 4 | 4 | - |
| **Latvia** | 7 | 12 | Increase | 6 | 8 | Increase |
| **Lithuania** | 9 | 8 | Decrease | 12 | 13 | Increase |
| **Luxembourg** | na | na | - | 8 | na | - |
| **Malta** | 1 | 1 | Stable | 8 | 9 | Increase |
| **Netherlands** | 4 | 2 | Stable | 4 | 2 | Decrease |
| **Norway** | na | na | - | 8 | 8 | Stable |
| **Poland** | 4 | 4 | Stable | 6 | 7 | Increase |
| **Portugal** | 1 | 1 | Stable | 8 | 11 | Increase |
| **Romania** | 7 | 8 | Increase | na | na | - |
| **Serbia** | 1 | 1 | Stable | 6 | 6 | Stable |
| **Slovakia** | 8 | 6 | Increase | 9 | 11 | Increase |
| **Spain** | 2 | 2 | Stable | 2 | 2 | Stable |
| **Sweden** | 2 | 2 | Stable | 2 | 2 | Stable |
| **United Kingdom** | 1 | 1 | Stable | 1 | 1 | Stable |

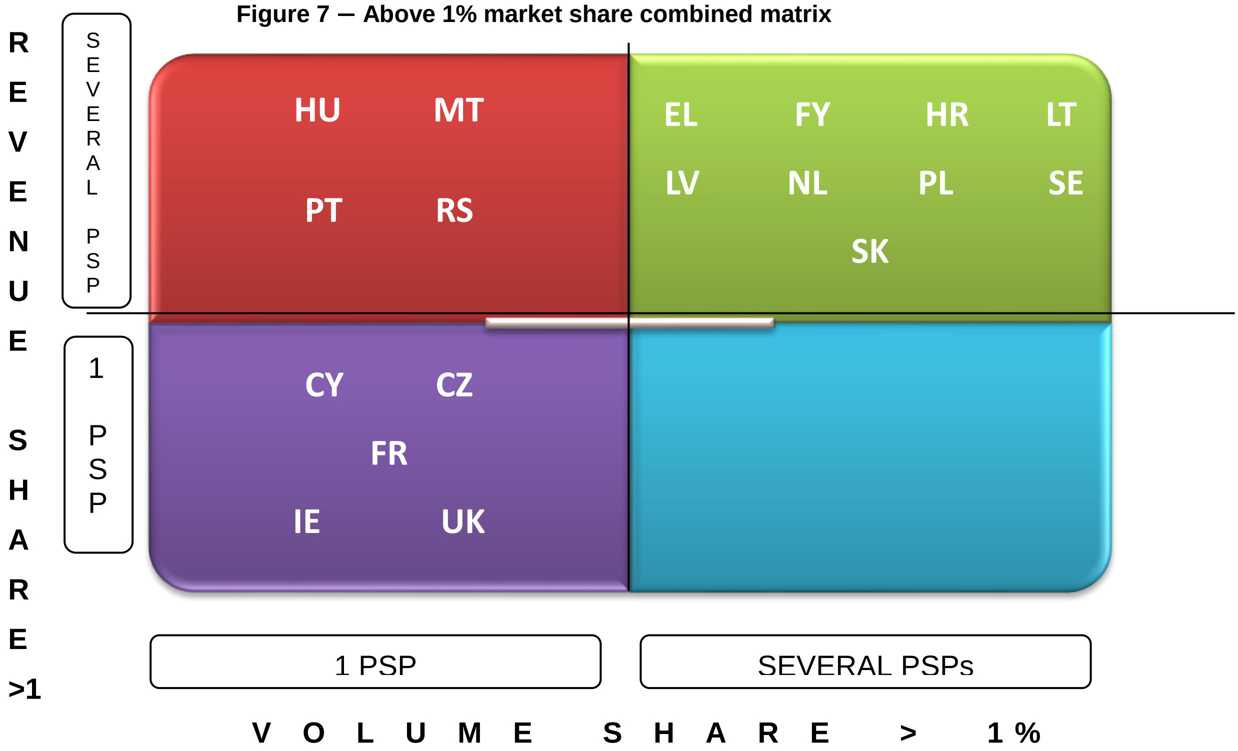
Notes: DE: PSP for "item of correspondence": 2, while PSP for "parcels": 8

For this indicator, countries could also be clustered in three categories (Figure 7):

1. CY, CZ, FR, IE and UK: with just one PSP having market share -in both volume and value- above 1%, which are practically the countries having data available only for the USP,
2. HU, MT, PT and RS: with just one PSP with volume share above 1% while several PSPs with revenue share above 1%, meaning that just one PSP (most probably the USP) holds 99% of the postal market volume, while several PSPs have revenue market share above 1%,
3. EL, FY, HR, LV, LT, NL, PL, SE, SK: this cluster could be characterised as the “pluralistic” one, since in those postal markets exist several PSPs with market share above 1% in both volume and value.

There are no countries positioned on the bottom right quartile, since there is not a single case of having only one PSP with 99% value market share while several PSPs with more than 1% volume share in the postal market.

**Figure 7 – Above 1% market share combined matrix**



## 9. Volumes

The following section looks at the volume trends across the member states that have been able to provide data in the categories defined in the questionnaire. The key findings of this section are:

- A very heterogeneous consumption of postal services in Europe

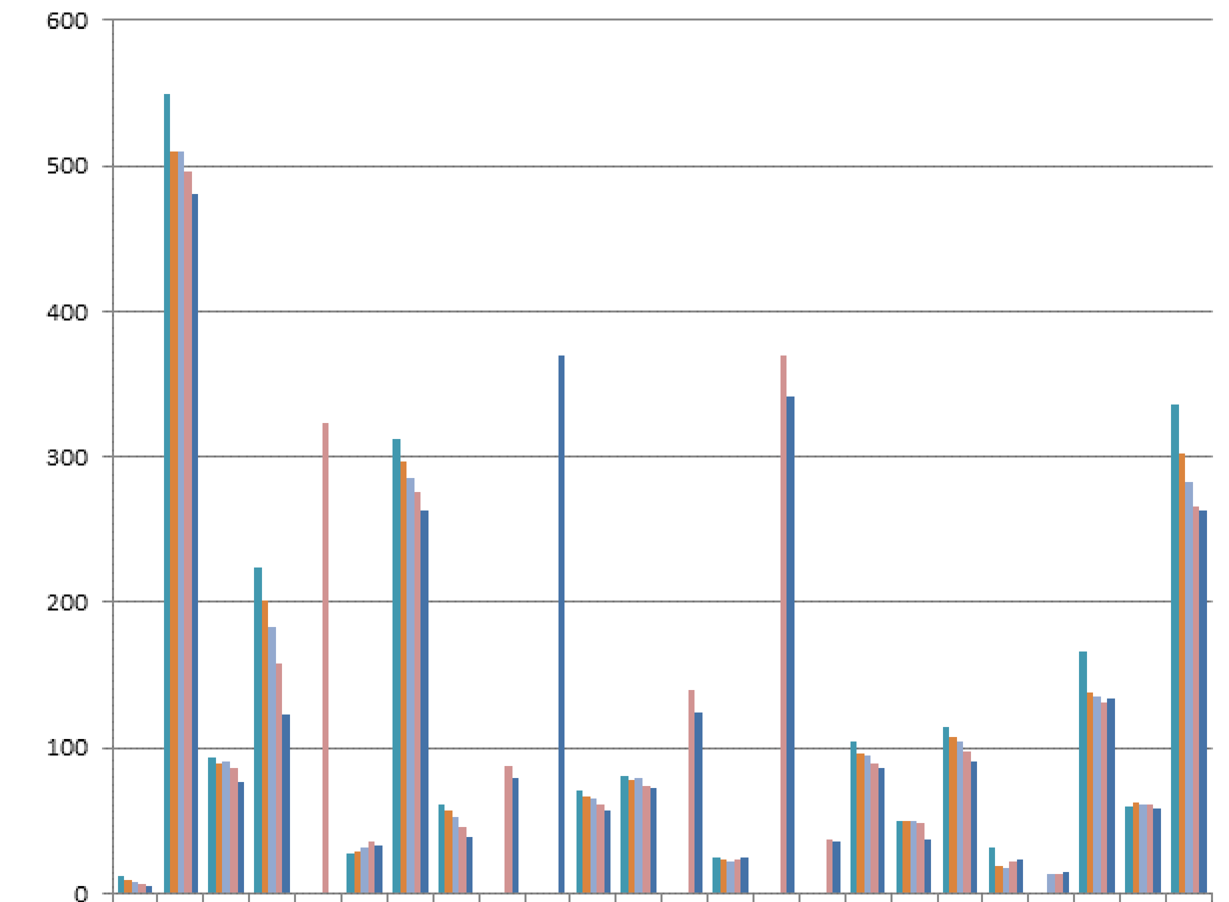
  The intensity of the use of postal services is very different among the different European countries. The countries of Western Europe and of northern Europe are characterized by an extensive use of postal services. Switzerland and, to a lesser extent Germany and France, are striking examples with a number of objects by over 300 per capita.

  Eastern European countries, in particular, seem to use less postal services with a number of objects per year per capita much smaller (about a few dozen only).

- A general decrease of volumes in Europe

  Postal traffic decline in almost all European countries and this phenomenon is particularly marked in the northern countries of Western Europe. Denmark has a particularly remarkable case with volumes falling by 30% between 2008 and 2011. Although postal traffic experiencing a significant decrease in the northern countries of Western Europe, volumes are much higher than those of Eastern Europe in particular.

**Figure 8– Total postal traffic per capita (excluding express)***




| | BG | CH | CY | DK | DE | FY | FR | EL | ES | FI | HR | HU | IE | LT | LU | LV | MT | PL | PT | RO | RS | SI | SK | UK |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 12 | 549 | 93 | 223 | | 28 | 312 | 61 | | | 71 | 81 | | 25 | | | 105 | 50 | 114 | 32 | | 166 | 59 | 337 |
| 2009 | 9 | 510 | 89 | 201 | | 29 | 296 | 57 | | | 66 | 78 | | 24 | | | 96 | 50 | 108 | 19 | | 139 | 63 | 302 |
| 2010 | 8 | 510 | 91 | 183 | | 31 | 285 | 52 | | | 65 | 79 | | 21 | | | 94 | 50 | 104 | 17 | 13 | 136 | 60 | 282 |
| 2011 | 6 | 496 | 86 | 158 | 323 | 36 | 276 | 45 | 88 | | 61 | 74 | 139 | 23 | 370 | 37 | 89 | 49 | 98 | 22 | 14 | 131 | 61 | 266 |
| 2012 | 5 | 480 | 77 | 123 | | 33 | 263 | 39 | 79 | 370 | 57 | 72 | 124 | 25 | 342 | 36 | 86 | 37 | 90 | 23 | 15 | 134 | 58 | 264 |

*Total traffic = domestic traffic + international outbound traffic; International inbound traffic is not added to total traffic to avoid duplication with international outbound when calculating the total traffic at a European level.

Notes:

Belgium (BE) provided data including express and Germany (DE) provided data including unaddressed mail for 2008, 2009 and 2010. The figures are as follows:

| | 2008 | 2009 | 2010 | 2011 | 2012 |
|---|---|---|---|---|---|
| BE | | | 244 | 233 | 221 |
| DE | ~ 517 | ~ 507 | ~ 523 | | |

Confidential: AT, CZ, IT

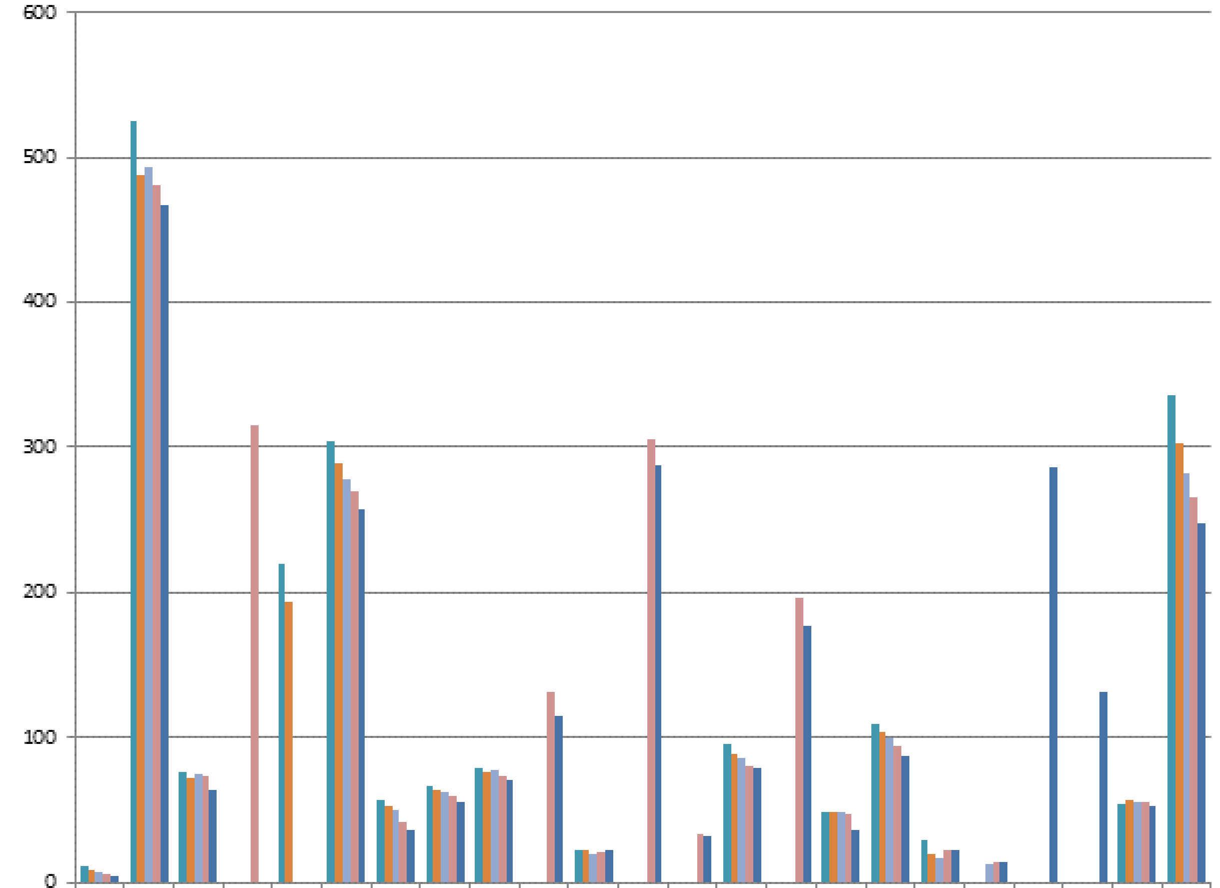
Not available: AT, EE, NL, NO, SE.

US only: MT, IE

USP only: HU, RS

Single piece only: BG, LT, LV.

**Figure 9–Domestic items per capita (excluding express)**




| | BG | CH | CY | DE | EE | FR | EL | HR | HU | IE | LT | LU | LV | MT | NO | PL | PT | RO | RS | SE | SI | SK | UK |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 11 | 524 | 77 | | 220 | 304 | 57 | 67 | 80 | | 23 | | | 95 | | 49 | 110 | 30 | | | | 55 | 336 |
| 2009 | 9 | 487 | 73 | | 194 | 289 | 53 | 64 | 77 | | 23 | | | 88 | | 49 | 104 | 19 | | | | 57 | 302 |
| 2010 | 7 | 494 | 75 | | | 278 | 50 | 63 | 78 | | 20 | | | 87 | | 49 | 100 | 17 | 13 | | | 55 | 282 |
| 2011 | 6 | 481 | 74 | 316 | | 270 | 42 | 60 | 73 | 131 | 22 | 305 | 33 | 81 | 196 | 48 | 94 | 22 | 14 | | | 55 | 266 |
| 2012 | 5 | 468 | 63 | | | 257 | 36 | 56 | 70 | 116 | 22 | 288 | 32 | 79 | 177 | 36 | 87 | 23 | 14 | 287 | 132 | 53 | 248 |

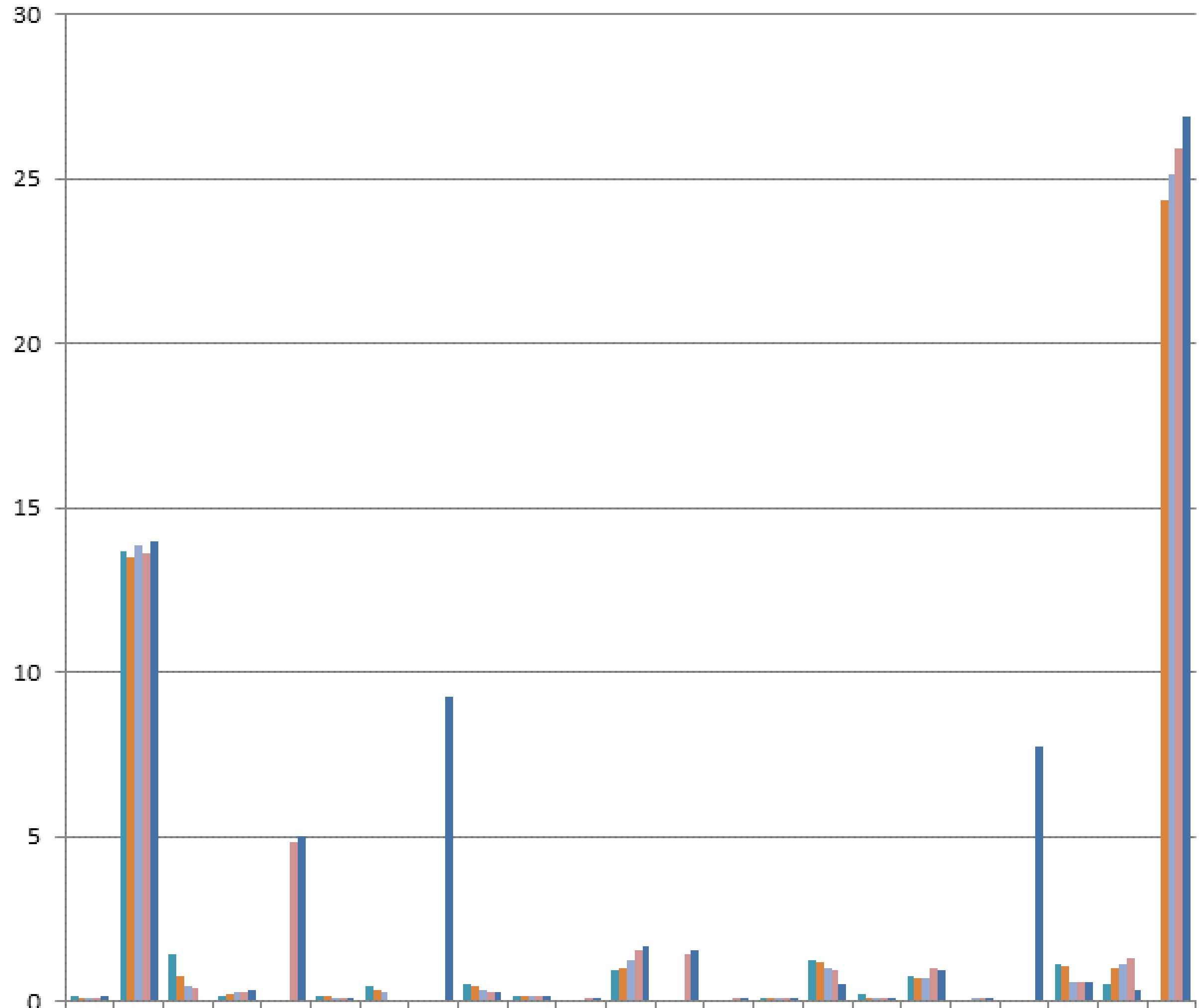
Note: Germany (DE) provided data including unaddressed mail for 2008, 2009 and 2010 and NO provided data including express for 2008, 2009 and 2010. The figures are as follows:

| | 2008 | 2009 | 2010 |
|---|---|---|---|
| DE | 512 | 501 | 517 |
| NO | 780 | 693 | 706 |

Confidential: AT, CZ, DK, IT
Not available: AT, BE, ES, FI, FY, NL
US only: EL, MT, IE
USP only: CH, HU, RS
Single piece only: BG, LV, LT
Excluding periodicals and newspapers: NO

It can be seen on the previous graph that the use of postal services per capita diminishes also very rapidly in the UK (- 21 % since 2008).

**Figure 10– Domestic Postal parcels per capita (excluding express)**




| | BG | CH | EE | FY | FR | EL | ES | FI | HR | HU | IE | LT | LU | LV | MT | PL | PT | RO | RS | SE | SK | SI | UK |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 0,1 | 13,7 | 1,4 | 0,1 | 0,0 | 0,1 | 0,4 | | 0,5 | 0,2 | | 0,9 | | | 0,0 | 1,3 | 0,2 | 0,7 | | | 1,1 | 0,5 | |
| 2009 | 0,1 | 13,5 | 0,8 | 0,2 | 0,0 | 0,1 | 0,3 | | 0,4 | 0,1 | | 1,0 | | | 0,0 | 1,2 | 0,1 | 0,7 | | | 1,1 | 1,0 | 24,4 |
| 2010 | 0,1 | 13,9 | 0,5 | 0,2 | 0,0 | 0,1 | 0,3 | | 0,3 | 0,1 | | 1,2 | | | 0,0 | 1,0 | 0,1 | 0,7 | 0,0 | | 0,6 | 1,1 | 25,2 |
| 2011 | 0,1 | 13,6 | 0,4 | 0,3 | 4,8 | 0,1 | | | 0,3 | 0,1 | 0,1 | 1,5 | 1,41 | 0,1 | 0,0 | 1,0 | 0,1 | 1,0 | 0,0 | | 0,6 | 1,3 | 25,9 |
| 2012 | 0,1 | 14,0 | | 0,3 | 5,0 | 0,1 | | 9,3 | 0,3 | 0,1 | 0,1 | 1,7 | 1,56 | 0,1 | 0,0 | 0,5 | 0,1 | 1,0 | 0,0 | 7,7 | 0,6 | 0,3 | 26,9 |

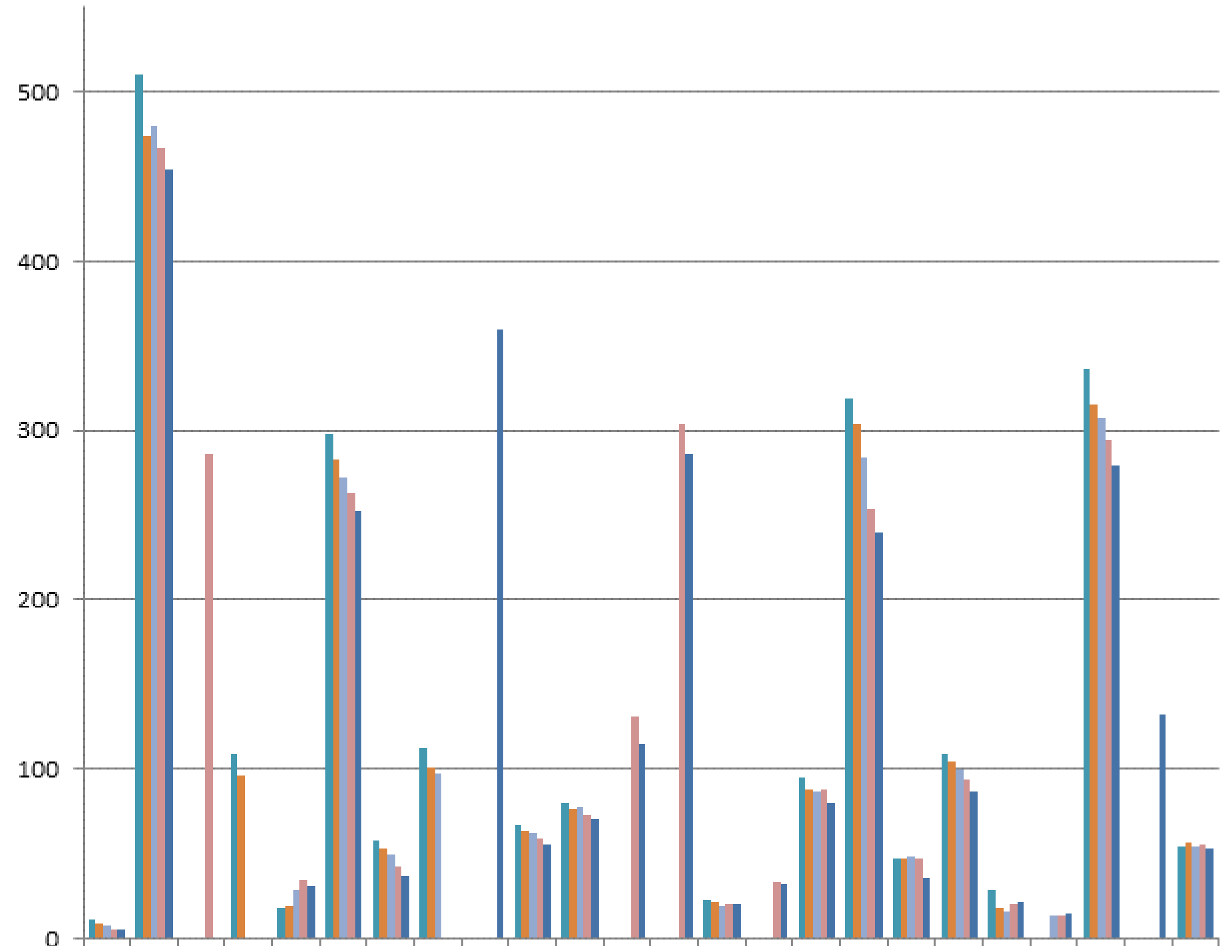
Note: Germany (DE) and Norway (NO) provided data including express items. The figures are as follows:

| | 2008 | 2009 | 2010 | 2011 | 2012 |
|---|---|---|---|---|---|
| DE | 23 | 23 | 24 | 29,6 | |
| NO | 7,7 | 7,1 | 7,4 | 6,7 | 6,2 |

Confidential: AT, CZ, DK, IT
Not available: AT, BE, CY, NL
US only: MT, IE
USP only: CH, EL, ES, HU, RS
Single piece only: BG, CH, LT, LV

There is no clear tendency concerning postal parcels on a European level. The market is growing in FR. But in the other hand, it is heavily declining in some other countries such as EE or PL.

**Figure 11–Domestic letter post items per capita (excluding express)***




| | BG | CH | DE | EE | FY | FR | EL | ES | FI | HR | HU | IE | LU | LT | LV | MT | NL | PL | PT | RO | RS | SE | SI | SK |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 11 | 511 | | 109 | 18 | 298 | 57 | 113 | | 67 | 80 | | | 22 | | 95 | 319 | 48 | 109 | 29 | | 336 | | 54 |
| 2009 | 8 | 474 | | 96 | 19 | 283 | 53 | 101 | | 63 | 77 | | | 22 | | 88 | 304 | 48 | 104 | 19 | | 315 | | 56 |
| 2010 | 7 | 480 | | | 29 | 273 | 49 | 97 | | 62 | 78 | | | 19 | | 87 | 284 | 48 | 100 | 16 | 13 | 308 | | 55 |
| 2011 | 6 | 467 | 286 | | 34 | 263 | 42 | | | 59 | 73 | 131 | 304 | 20 | 33 | 87 | 253 | 47 | 94 | 21 | 14 | 294 | | 55 |
| 2012 | 5 | 454 | | | 31 | 252 | 36 | | 360 | 55 | 70 | 115 | 286 | 20 | 32 | 79 | 240 | 35 | 87 | 22 | 14 | 279 | 132 | 53 |

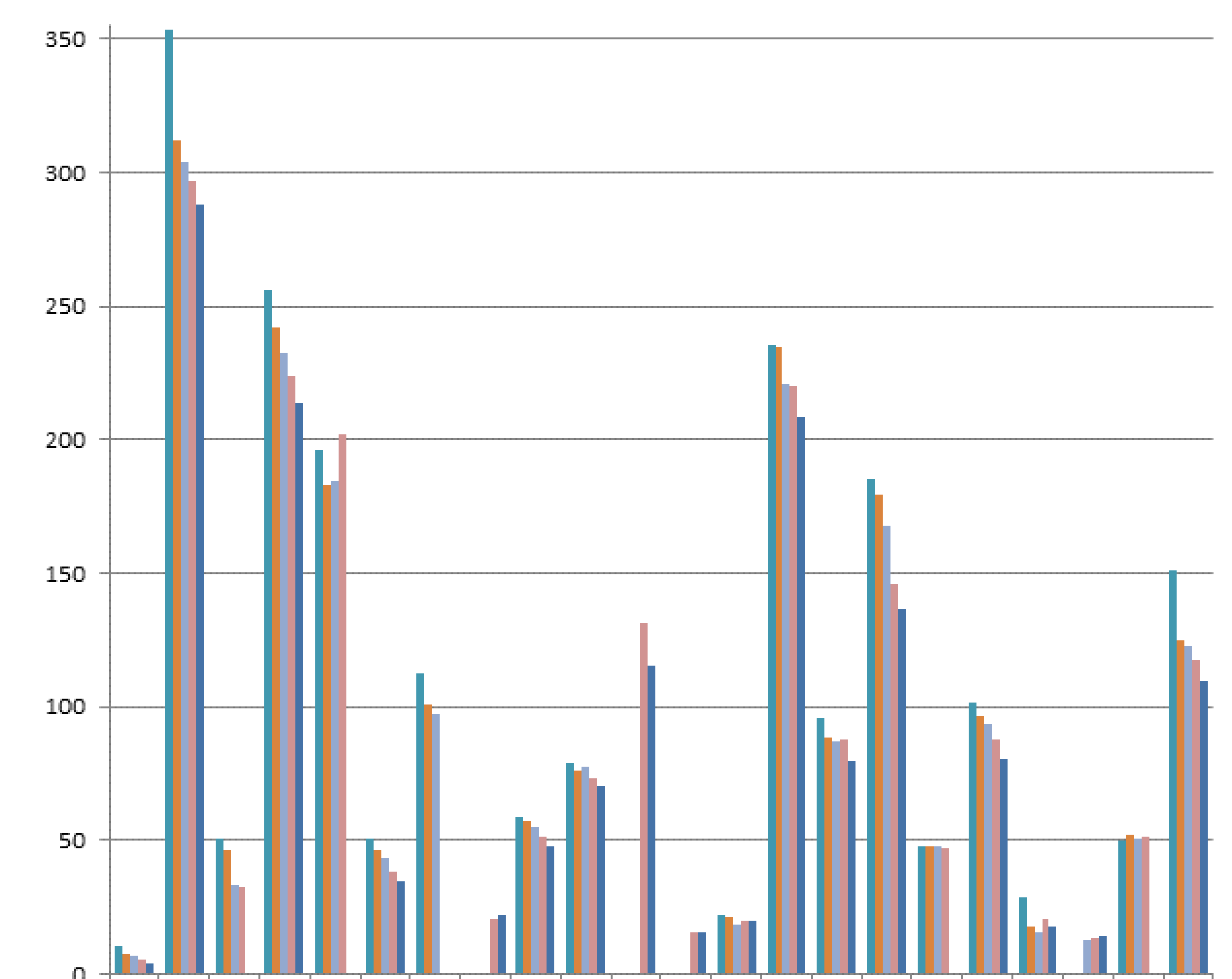
* Letter post items include items of correspondence (e.g. ordinary letters and postcards, direct mail, registered mail, insured mail) and other letter-post items (books, catalogues, newspapers and periodicals). It does not include postal parcels.
Note: Germany (DE) provided data including unaddressed mail for 2008, 2009 and 2010. The figures are as follows:

| | 2008 | 2009 | 2010 |
|---|---|---|---|
| DE | 489 | 478 | 492 |

Confidential: CZ, DK, UK
Not available: AT, BE, CY, NO
US only :EL, MT, IE
USP only :CH, ES, HU, RS
Single piece only : BG,LT, LV
NL : four largest operators

Letter post items (see previous Figure) represent the major part of the postal market. This segment of the market is declining throughout Europe. The volumes of most European countries have decreased between 10 and 20% for the period from 2008 to 2011.

**Figure 12– Domestic items of correspondence per capita (excluding express)**




| | BG | CH | EE | FR | DE | EL | ES | FY | HR | HU | IE | LV | LT | LU | MT | NL | PL | PT | RO | RS | SK | SI |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 10 | 353 | 51 | 256 | 196 | 51 | 112 | | 59 | 79 | | | 22 | 235 | 95 | 185 | 48 | 102 | 29 | | 50 | 151 |
| 2009 | 8 | 312 | 46 | 242 | 183 | 46 | 101 | | 57 | 76 | | | 22 | 235 | 88 | 179 | 48 | 97 | 18 | | 52 | 125 |
| 2010 | 7 | 304 | 33 | 233 | 185 | 43 | 97 | | 55 | 77 | | | 19 | 221 | 87 | 168 | 48 | 93 | 16 | 13 | 51 | 123 |
| 2011 | 5 | 297 | 33 | 224 | 202 | 38 | | 21 | 52 | 73 | 131 | 15 | 20 | 220 | 87 | 146 | 47 | 88 | 21 | 13 | 51 | 118 |
| 2012 | 4 | 288 | | 214 | | 34 | | 22 | 48 | 70 | 115 | 16 | 20 | 209 | 79 | 136 | | 81 | 18 | 14 | | 109 |

Note:
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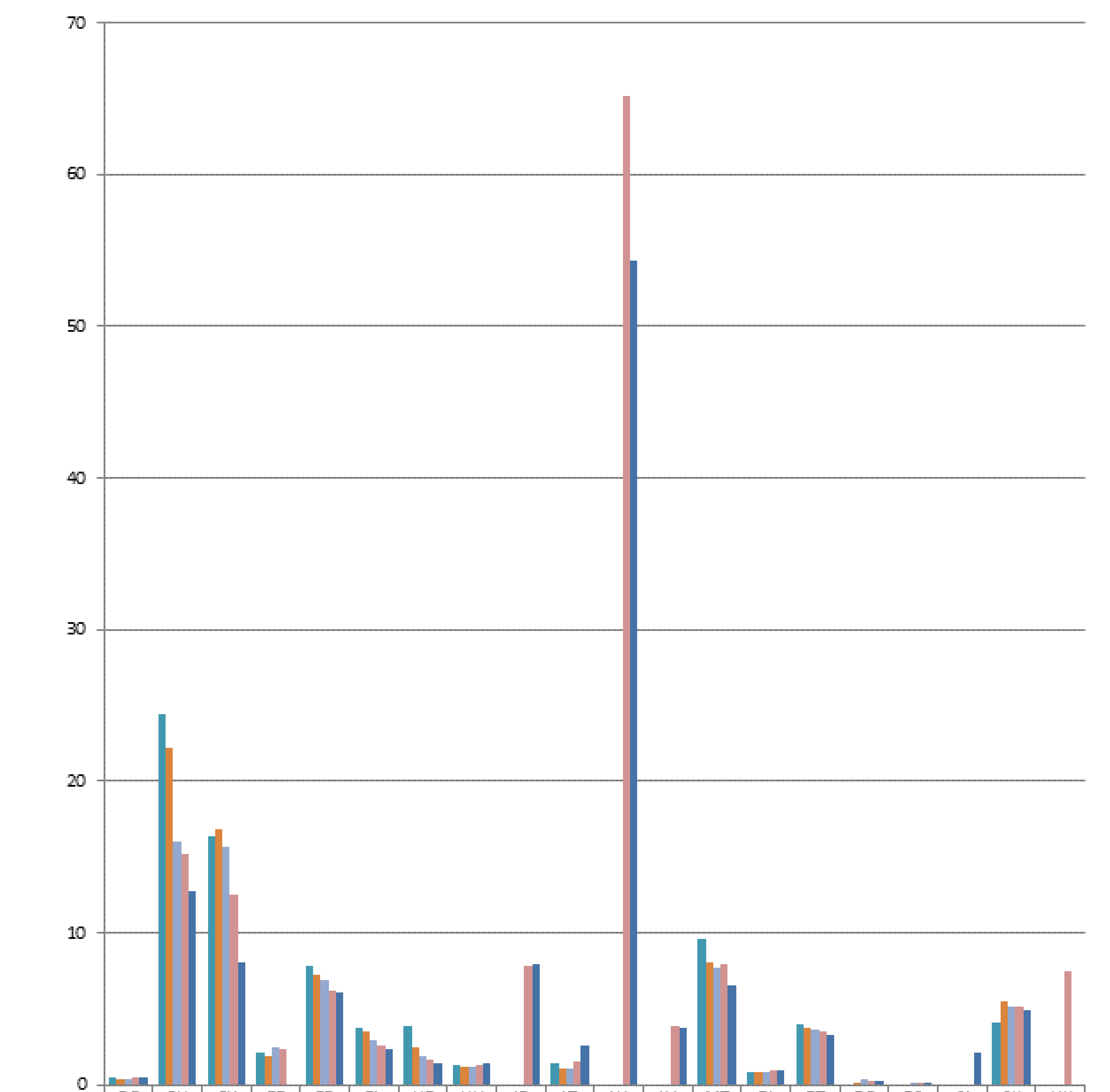
Not available :AT, BE, CY, FI, NO, SE
US only :EL, MT, IE
USP only :CH, ES, HU, LU, RS
Single piece only : BG, LT, LU, LV
NL : four largest operators

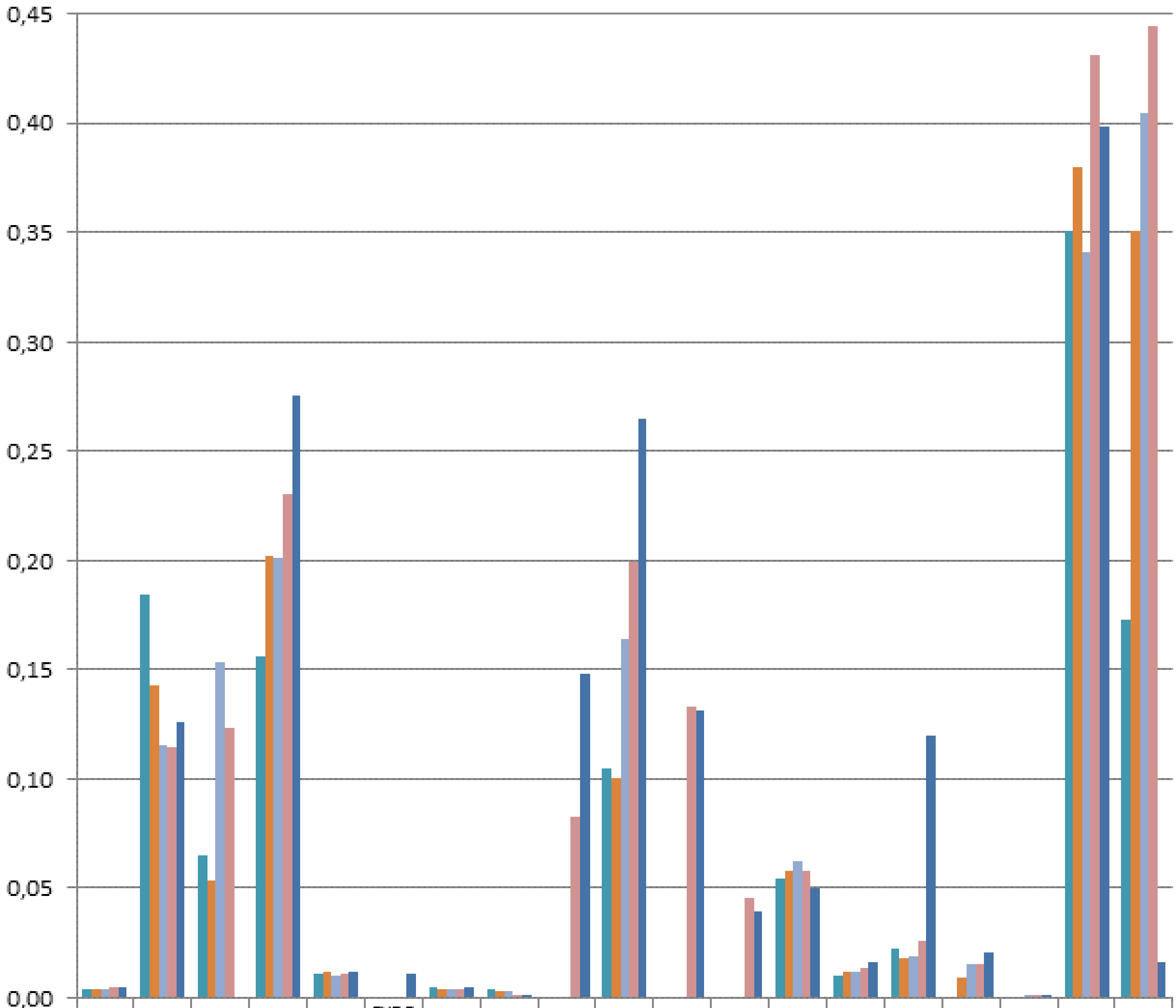
**Figure 13–Total traffic international outbound per capita (excluding express)**




| | BG | CH | CY | EE | FR | EL | HR | HU | IE | LT | LU | LV | MT | PL | PT | RO | RS | SI | SK | UK |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 0,5 | 24,4 | 16,4 | 2,1 | 7,9 | 3,7 | 3,9 | 1,3 | | 1,4 | | | 9,6 | 0,9 | 4,0 | 0,0 | | | 4,2 | |
| 2009 | 0,4 | 22,2 | 16,8 | 1,9 | 7,3 | 3,5 | 2,5 | 1,3 | | 1,1 | | | 8,1 | 0,9 | 3,7 | 0,2 | | | 5,5 | |
| 2010 | 0,4 | 16,1 | 15,6 | 2,5 | 6,9 | 2,9 | 1,9 | 1,3 | | 1,1 | | | 7,7 | 0,9 | 3,7 | 0,3 | 0,1 | | 5,2 | |
| 2011 | 0,5 | 15,3 | 12,5 | 2,4 | 6,2 | 2,6 | 1,7 | 1,3 | 7,8 | 1,5 | 65,1 | 3,9 | 8,0 | 0,9 | 3,5 | 0,3 | 0,1 | | 5,1 | 7,5 |
| 2012 | 0,5 | 12,8 | 8,1 | | 6,1 | 2,4 | 1,5 | 1,4 | 8,0 | 2,6 | 54,3 | 3,7 | 6,6 | 0,9 | 3,3 | 0,3 | 0,1 | 2,1 | 5,0 | |

Note:
Confidential : AT, CZ, DE, DK, IT
Not available :AT, BE, DE, ES, FI, FY, NL, NO, SE
US only : MT, IE
USP only :CH, EL, HU, RO, RS
Single piece only : BG, LV, LT

**Figure 14– Outbound parcels per capita (excluding express)**

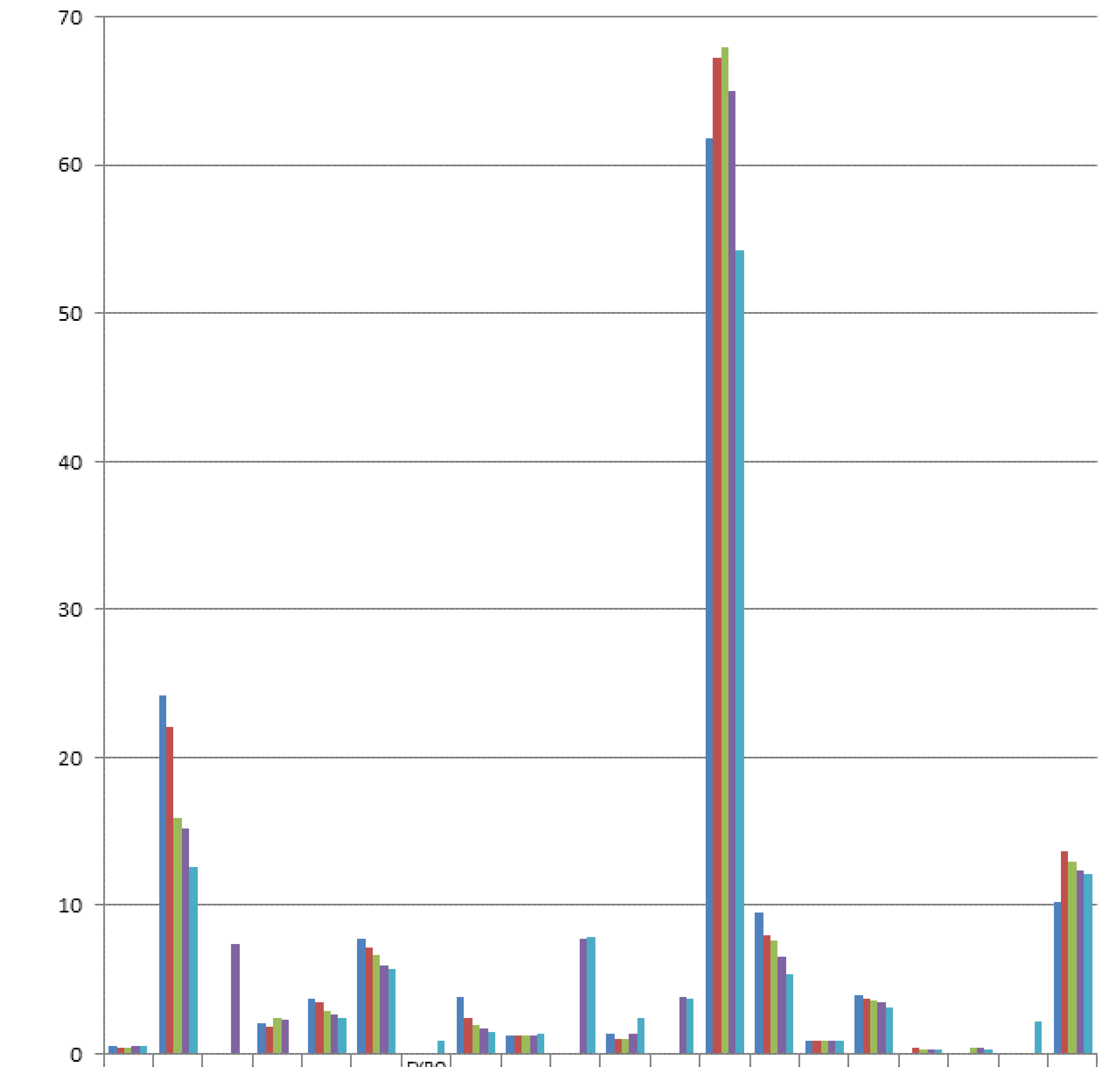



| | BG | CH | EE | FR | EL | FYROM | HR | HU | IE | LT | LU | LV | MT | PL | PT | RO | RS | SK | SI |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 0,004 | 0,184 | 0,065 | 0,156 | 0,011 | | 0,005 | 0,004 | | 0,105 | | | 0,054 | 0,011 | 0,022 | | | 0,351 | 0,173 |
| 2009 | 0,004 | 0,143 | 0,053 | 0,202 | 0,012 | | 0,004 | 0,003 | | 0,100 | | | 0,058 | 0,012 | 0,018 | 0,009 | | 0,380 | 0,351 |
| 2010 | 0,004 | 0,116 | 0,154 | 0,201 | 0,010 | | 0,004 | 0,003 | | 0,165 | | | 0,063 | 0,012 | 0,019 | 0,016 | 0,001 | 0,341 | 0,405 |
| 2011 | 0,004 | 0,114 | 0,124 | 0,231 | 0,011 | | 0,004 | 0,002 | 0,082 | 0,200 | 0,133 | 0,045 | 0,058 | 0,014 | 0,026 | 0,015 | 0,001 | 0,431 | 0,445 |
| 2012 | 0,005 | 0,126 | | 0,276 | 0,012 | 0,011 | 0,004 | 0,002 | 0,148 | 0,265 | 0,131 | 0,040 | 0,050 | 0,017 | 0,120 | 0,021 | 0,001 | 0,398 | 0,016 |

Note:
Confidential : AT, CZ, DK, IT
Not available :AT, BE, CY, DE, ES, FI, NL, NO, SE, UK
US only : FY, MT, IE
USP only :CH, EL, HU,RO, RS
Single piece only : BG,CH, LT, LV

Over all, the shipments of international parcels are growing. But the volumes remain nevertheless rather low.

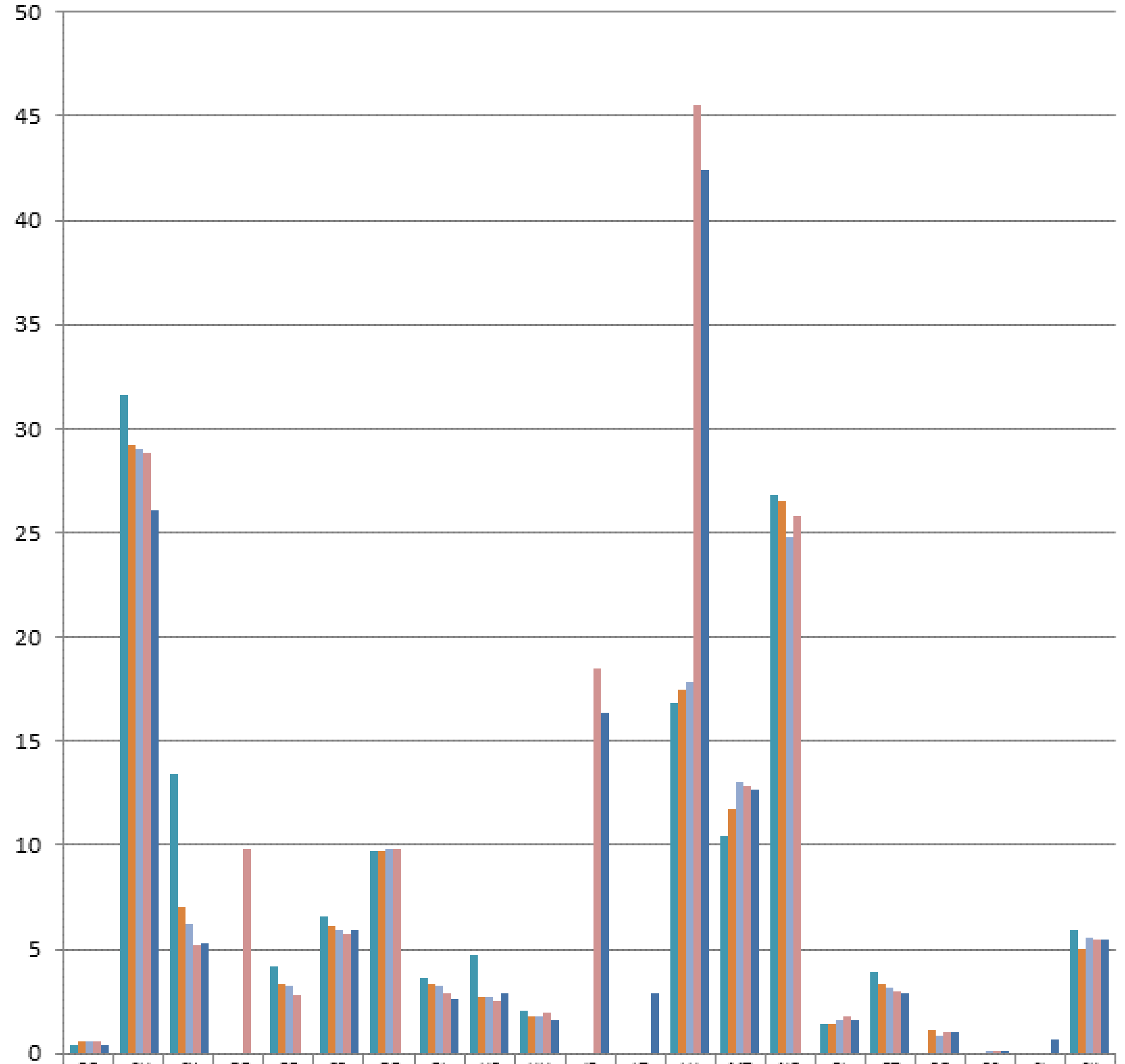
**Figure 15– Outbound letter post items per capita (excluding express)**




| | BG | CH | DE | EE | EL | FR | FYROM | HR | HU | IE | LT | LV | LU | MT | PL | PT | RO | RS | SI | SK |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 0,5 | 24,2 | | 2,1 | 3,7 | 7,7 | | 3,9 | 1,3 | | 1,3 | 0,0 | 61,8 | 9,6 | 0,9 | 4,0 | | | | 10,2 |
| 2009 | 0,4 | 22,1 | | 1,9 | 3,5 | 7,1 | | 2,5 | 1,2 | | 1,0 | 0,0 | 67,3 | 8,0 | 0,9 | 3,7 | 0,4 | | | 13,6 |
| 2010 | 0,4 | 16,0 | | 2,4 | 2,9 | 6,7 | | 1,9 | 1,2 | | 0,9 | 0,0 | 67,9 | 7,6 | 0,9 | 3,6 | 0,3 | 0,4 | | 13,0 |
| 2011 | 0,5 | 15,1 | 7,3 | 2,3 | 2,7 | 6,0 | | 1,7 | 1,3 | 7,7 | 1,3 | 3,8 | 65,0 | 6,6 | 0,9 | 3,5 | 0,3 | 0,4 | | 12,4 |
| 2012 | 0,5 | 12,6 | | | 2,4 | 5,8 | 0,9 | 1,5 | 1,4 | 7,9 | 2,4 | 3,7 | 54,2 | 5,4 | 0,9 | 3,2 | 0,3 | 0,2 | 2,1 | 12,1 |

Notes:
Confidential : AT, CZ, DK
Not available :AT, BE, CY, ES, FI, NL, NO, SE, UK
US only : FY, MT, IE
USP only :CH, EL, HU, LU, RO, RS
Single piece only : BG, LT, LU,LV

**Figure 16– International inbound per capita (excluding express)**



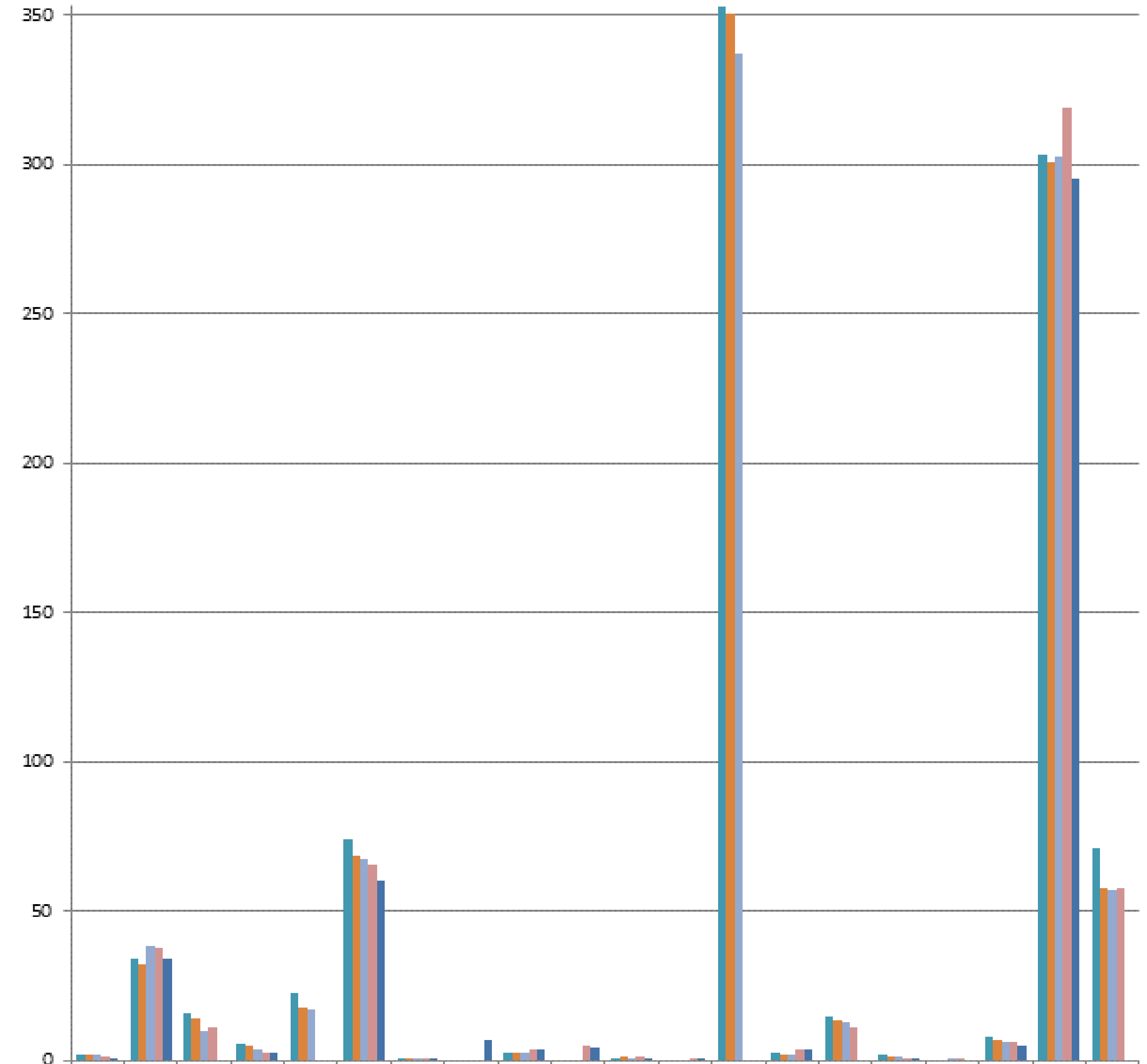

| | BG | CH | CY | DE | EE | FR | DE | EL | HR | HU | IE | LT | LU | MT | NO | PL | PT | RO | RS | SI | SK |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 0,38 | 31,62 | 13,39 | | 4,14 | 6,61 | 9,73 | 3,66 | 4,76 | 2,02 | | | 16,86 | 10,48 | 26,84 | 1,44 | 3,88 | | | | 5,97 |
| 2009 | 0,58 | 29,19 | 7,01 | | 3,38 | 6,15 | 9,76 | 3,38 | 2,66 | 1,79 | | | 17,51 | 11,75 | 26,57 | 1,45 | 3,34 | 1,12 | | | 5,02 |
| 2010 | 0,59 | 29,04 | 6,25 | | 3,25 | 5,90 | 9,78 | 3,22 | 2,71 | 1,81 | | | 17,84 | 13,08 | 24,73 | 1,57 | 3,12 | 0,85 | 0,15 | | 5,54 |
| 2011 | 0,57 | 28,79 | 5,16 | 9,79 | 2,83 | 5,73 | 9,79 | 2,92 | 2,49 | 1,98 | 19 | | 45,57 | 12,82 | 25,81 | 1,74 | 2,93 | 1,05 | 0,15 | | 5,50 |
| 2012 | 0,40 | 26,02 | 5,33 | | | 5,89 | | 2,61 | 2,93 | 1,59 | 16 | 2,91 | 42,37 | 12,68 | | 1,62 | 2,92 | 1,02 | 0,13 | 0,66 | 5,43 |

Note:
Norway (NO) provided data including express items. The figures are as follows :

| | 2008 | 2009 | 2010 | 2011 | 2012 |
|---|---|---|---|---|---|
| NO | 26,8 | 26,6 | 24,7 | 25,9 | 31,2 |

Confidential :AT, CZ, IT, UK
Not available : BE, ES, FI, FY, LV, NL, SE
US only : MT, IE
USP only :CH, EL, HU, LU, RO, RS
Single piece only : BG, LT

**Figure 17– Domestic direct mail per capita (excluding express)**




| | BG | CY | EE | EL | ES | FR | FY | HR | HU | IE | LT | LV | LU | PL | PT | RO | RS | SK | SI | UK |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 2,1 | 34,2 | 15,9 | 5,5 | 22,7 | 73,9 | 0,6 | 0,0 | 2,8 | | 1,0 | | 352,8 | 2,8 | 14,9 | 1,8 | | 8,4 | 303,1 | 71,1 |
| 2009 | 2,1 | 32,2 | 13,8 | 5,3 | 18,0 | 68,7 | 0,2 | 0,0 | 2,7 | | 1,2 | | 350,4 | 2,2 | 13,4 | 1,3 | | 6,8 | 300,8 | 57,8 |
| 2010 | 1,9 | 38,2 | 9,9 | 4,0 | 17,3 | 67,2 | 0,2 | 0,0 | 2,7 | | 0,9 | | 337,2 | 2,2 | 12,7 | 1,2 | 0,8 | 6,5 | 302,5 | 57,0 |
| 2011 | 1,4 | 37,6 | 11,4 | 2,4 | | 65,7 | 0,3 | 0,0 | 3,8 | 5,1 | 1,3 | 1,0 | | 3,7 | 11,4 | 0,7 | 0,8 | 6,4 | 318,6 | 57,9 |
| 2012 | 0,6 | 33,9 | | 2,6 | | 60,2 | 0,6 | 7,1 | 3,6 | 4,6 | 1,1 | 1,0 | | 3,6 | | 1,1 | | 5,3 | 295,5 | |

* Direct mail is a communication consisting solely of advertising, marketing, and publicity material and comprising identical message except for the addressee's name, address and identifying number as well as other modifications which do not alter the nature of the message, which is sent to a significant number of addressees, to be conveyed and delivered at the address indicated by the sender on the item itself or on its wrapping.

Note:

Confidential :AT, CZ, NL

Not available :AT, BE, CH, DK, DE, FI, MT, NO, SE

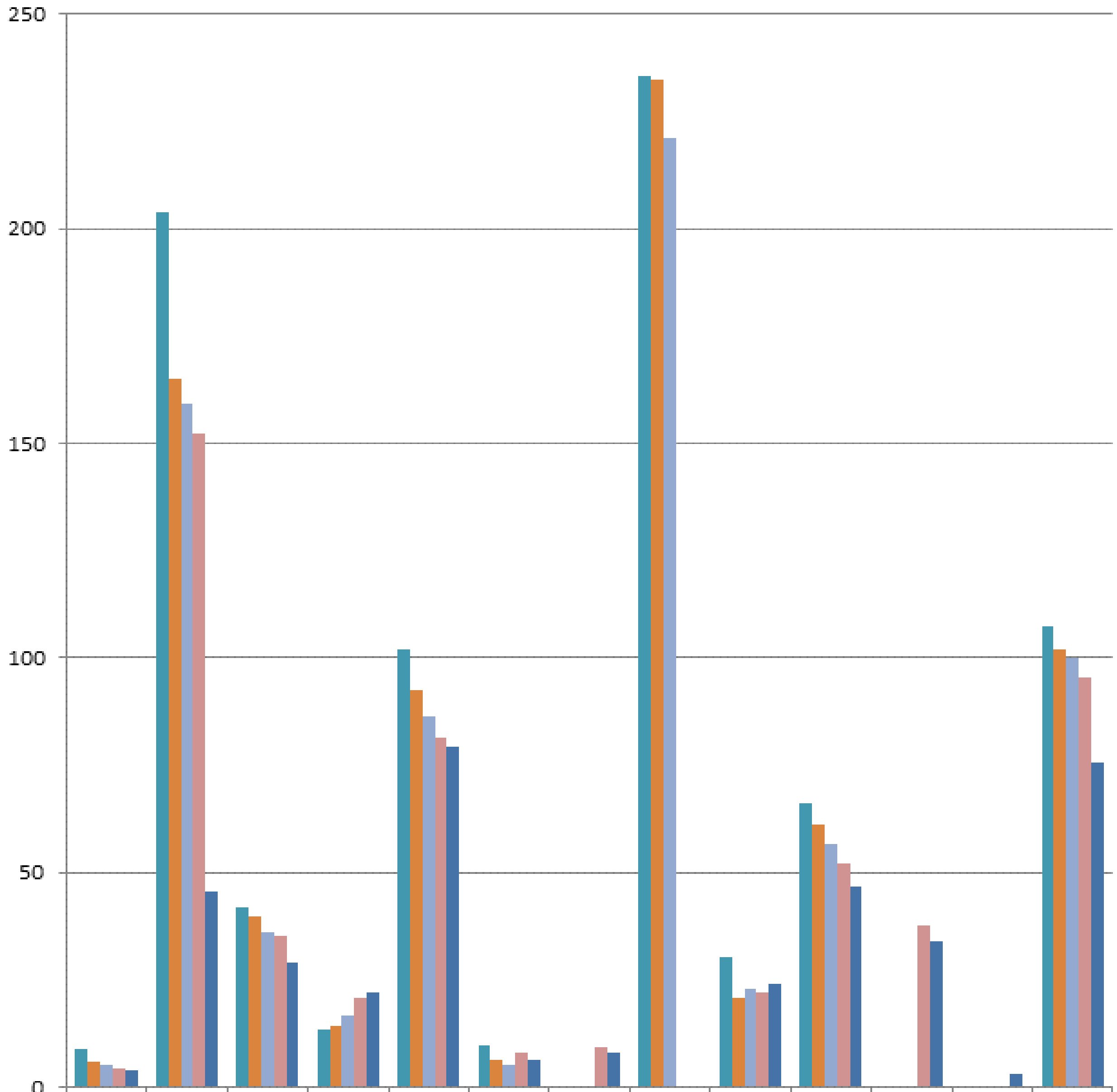
US only :EL, MT, IE

USP only :ES, HU, LU, PT, RS, SI

Single piece only :BG, LV, LT

**Figure 18– Domestic single piece items per capita (excluding express)***

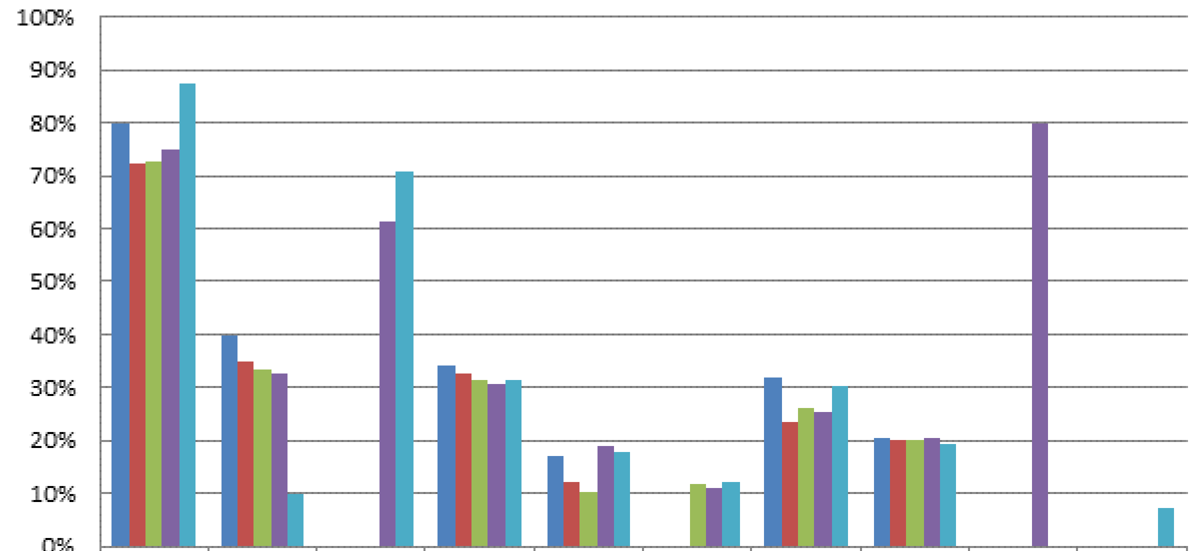
* Single piece items are postal services for which the tariff is set in the general terms and conditions of universal service provider(s) for individual postal items.




| | BG | CH | CY | FY | FR | EL | HU | LU | MT | NL | PL | RS | SI |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 8,7 | 203,9 | 41,7 | 13,4 | 101,9 | 9,7 | | 235,4 | 30,5 | 66,0 | | | 107,4 |
| 2009 | 6,1 | 164,9 | 39,8 | 14,2 | 92,6 | 6,4 | | 234,9 | 20,9 | 61,1 | | | 102,2 |
| 2010 | 5,3 | 159,4 | 35,9 | 16,7 | 86,2 | 5,1 | | 221,1 | 22,7 | 56,8 | | | 99,8 |
| 2011 | 4,3 | 152,1 | 35,1 | 21,0 | 81,2 | 8,0 | 9,3 | | 22,1 | 52,2 | 37,6 | | 95,4 |
| 2012 | 4,1 | 45,5 | 28,8 | 22,1 | 79,2 | 6,6 | 8,2 | | 24,0 | 46,8 | 33,8 | 3,0 | 75,8 |

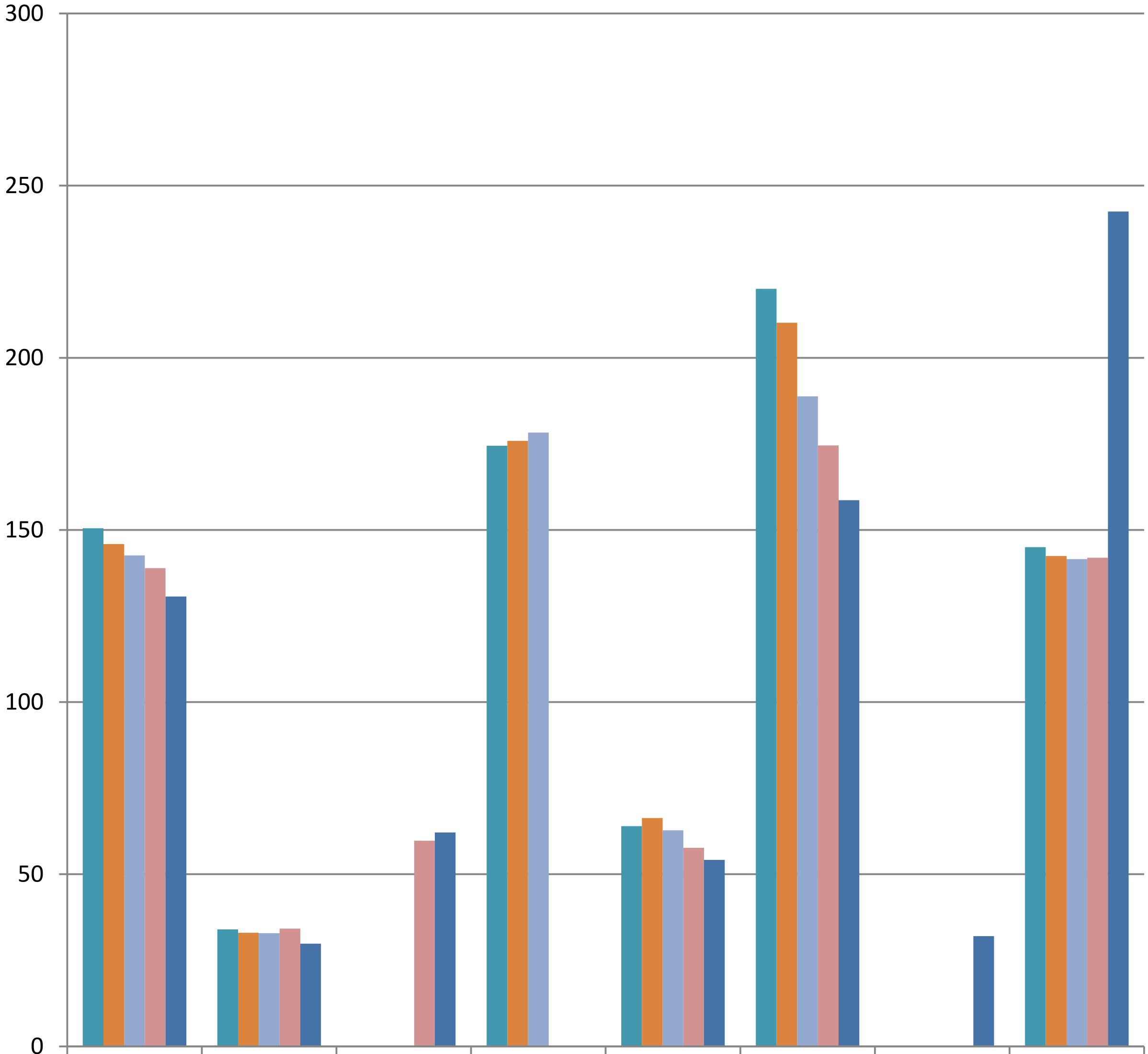
Note:
Confidential : AT, CZ, DK, UK
Not available :AT, BE, DE, EE, ES, FI, HR,IE, LV, NO, PT, RO, SE, SK
US only : MT, PL

**Figure 19 –Single piece mail as a % of domestic letter post items**




| | BG | CH | FY | FR | EL | HU | MT | NL | PL | RS |
|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 80% | 40% | | 34% | 17% | | 32% | 21% | | |
| 2009 | 72% | 35% | | 33% | 12% | | 24% | 20% | | |
| 2010 | 73% | 33% | | 32% | 10% | 12% | 26% | 20% | | |
| 2011 | 75% | 33% | 61% | 31% | 19% | 11% | 25% | 21% | 80% | |
| 2012 | 87% | 10% | 71% | 31% | 18% | 12% | 30% | 19% | | 7% |

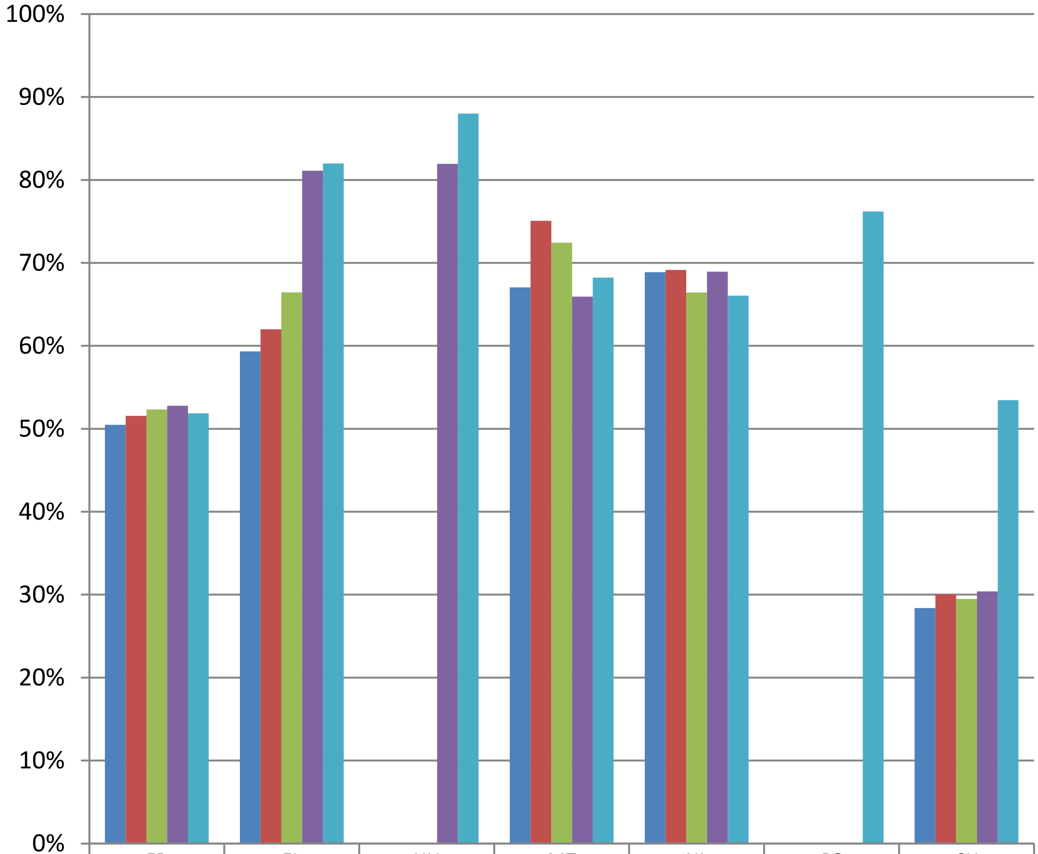
**Figure 20– Domestic bulk mail per capita (excluding express)***




| | FR | EL | HU | LU | MT | NL | RS | CH |
|---|---|---|---|---|---|---|---|---|
| 2008 | 150,5 | 34,0 | | 174,5 | 64,0 | 220,0 | 0,0 | 145,0 |
| 2009 | 145,9 | 33,0 | | 175,9 | 66,3 | 210,2 | 0,0 | 142,4 |
| 2010 | 142,6 | 32,8 | | 178,3 | 62,8 | 188,8 | 0,0 | 141,5 |
| 2011 | 138,9 | 34,2 | 59,7 | | 57,7 | 174,5 | 0,0 | 141,9 |
| 2012 | 130,7 | 29,8 | 62,1 | | 54,1 | 158,6 | 32,0 | 242,5 |

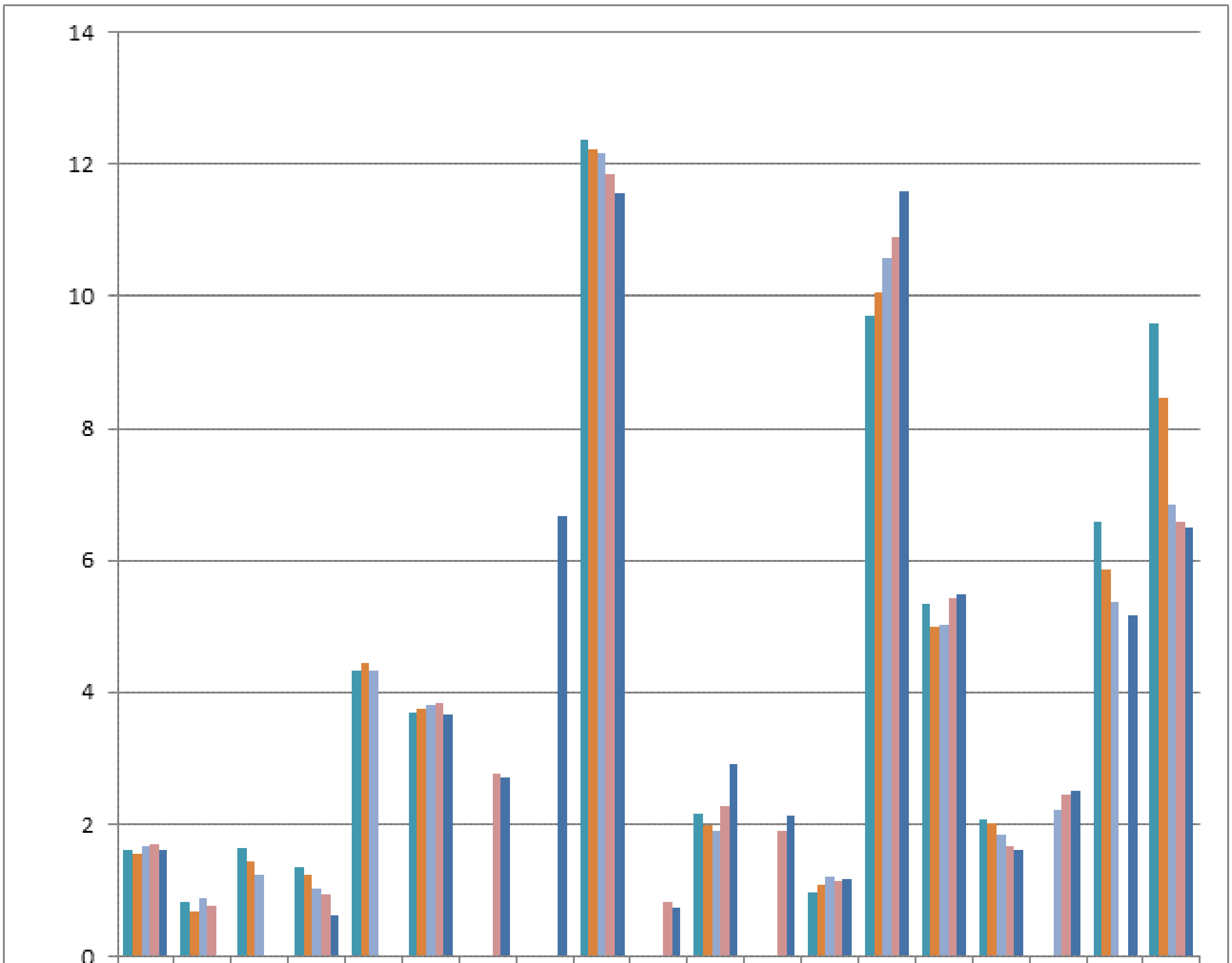
* bulk mail are mail that does not correspond to single-piece items.
Note:
Confidential : CZ, DK, UK
Not available :AT, BE, BG, CY,DK, DE, EE, ES, FI, HR, IE, LT, LV, NO, PL, PT,RO, SI, SE, SK
US only : MT
USP only :CH, EL, HU, LU, NL

**Figure 21– Bulk mail as a % of domestic letter post items**




| | FR | EL | HU | MT | NL | RS | CH |
|---|---|---|---|---|---|---|---|
| 2008 | 50% | 59% | | 67% | 69% | | 28% |
| 2009 | 52% | 62% | | 75% | 69% | | 30% |
| 2010 | 52% | 66% | | 72% | 66% | | 29% |
| 2011 | 53% | 81% | 82% | 66% | 69% | | 30% |
| 2012 | 52% | 82% | 88% | 68% | 66% | 76% | 53% |

**Figure 22– Domestic registered mail per capita (excluding express)***

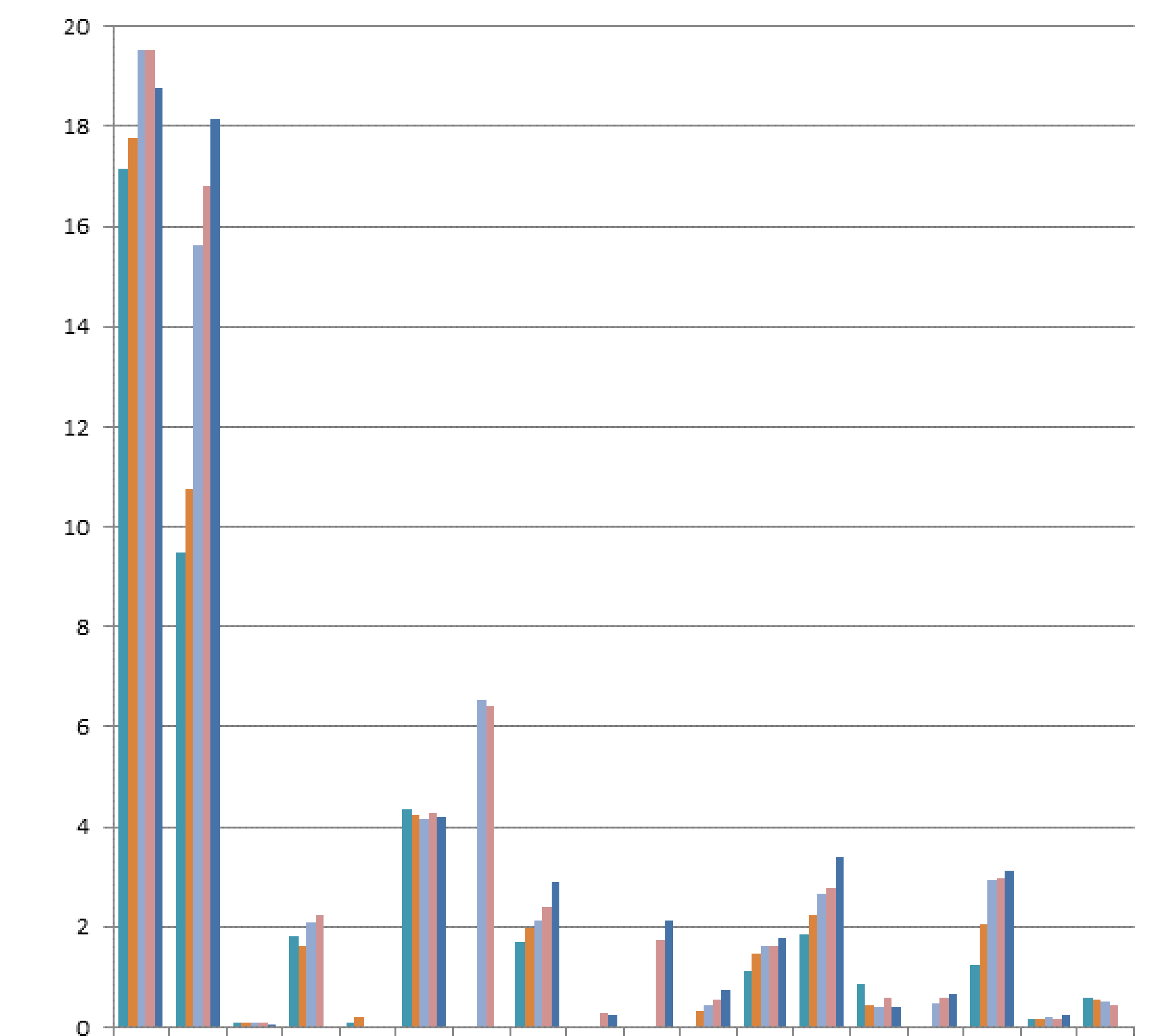


| | BG | CY | EE | EL | ES | FR | FY | HR | HU | IE | LT | LV | MT | PL | PT | RO | RS | SI | SK |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 1,6 | 0,8 | 1,6 | 1,3 | 4,3 | 3,7 | 0,0 | 0,0 | 12,4 | | 2,1 | | 1,0 | 9,7 | 5,3 | 2,1 | | 6,6 | 9,6 |
| 2009 | 1,6 | 0,7 | 1,4 | 1,2 | 4,5 | 3,7 | 0,0 | 0,0 | 12,2 | | 2,0 | | 1,1 | 10,0 | 5,0 | 2,0 | | 5,9 | 8,5 |
| 2010 | 1,7 | 0,9 | 1,2 | 1,0 | 4,3 | 3,8 | 0,0 | 0,0 | 12,2 | | 1,9 | | 1,2 | 10,6 | 5,0 | 1,8 | 2,2 | 5,4 | 6,8 |
| 2011 | 1,7 | 0,8 | | 0,9 | | 3,8 | 2,8 | 0,0 | 11,9 | 0,8 | 2,3 | 1,9 | 1,2 | 10,9 | 5,4 | 1,7 | 2,4 | 0,0 | 6,6 |
| 2012 | 1,6 | | | 0,6 | | 3,7 | 2,7 | 6,7 | 11,6 | 0,7 | 2,9 | 2,1 | 1,2 | 11,6 | 5,5 | 1,6 | 2,5 | 5,2 | 6,5 |

*Registered items is a service providing a flat-rate guarantee against risk of loss, theft or damage and supplying the sender where appropriate upon request with proof of the handling in of the postal item and/or its delivery to the addressee.
Note:
Confidential : CZ,DK, UK
Not available :AT, BE, CH, DK, DE, FI, LU,NL, NO, SE
US only : MT, IE
USP only : EL, HU, PL, PT, RS, SI, SK
Single piece only :BG, LV, LT

Overall, there is no clear tendency concerning the use of registered mail (that is mandatory in many legal, administrative or commercial procedures). Volumes per capital are extremely high in HU and PL.

**Figure 23– Express total traffic per capita**

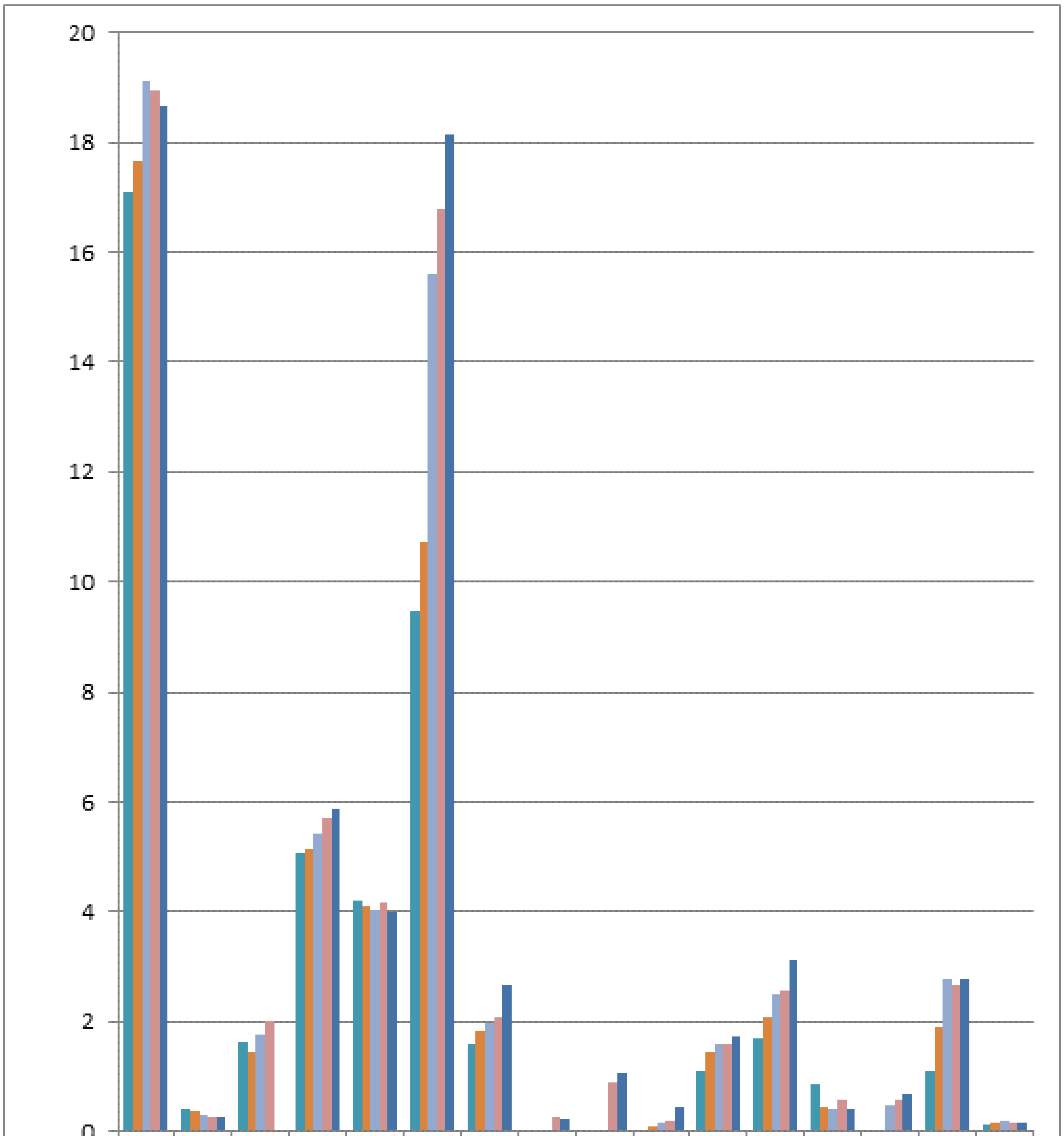



| | BG | HR | CY | EE | FY | EL | ES | HU | IE | LV | MT | PL | PT | RO | RS | SK | SI | CH |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 17,2 | 9,5 | 0,1 | 1,8 | 0,1 | 4,3 | | 1,7 | | | | 1,1 | 1,9 | 0,9 | | 1,3 | 0,2 | 0,6 |
| 2009 | 17,8 | 10,8 | 0,1 | 1,6 | 0,2 | 4,2 | | 2,0 | | | 0,3 | 1,5 | 2,2 | 0,4 | | 2,0 | 0,2 | 0,6 |
| 2010 | 19,5 | 15,6 | 0,1 | 2,1 | | 4,1 | 6,5 | 2,1 | | | 0,5 | 1,6 | 2,7 | 0,4 | 0,5 | 2,9 | 0,2 | 0,5 |
| 2011 | 19,5 | 16,8 | 0,1 | 2,2 | | 4,3 | 6,4 | 2,4 | 0,3 | 1,7 | 0,6 | 1,6 | 2,8 | 0,6 | 0,6 | 3,0 | 0,2 | 0,5 |
| 2012 | 18,8 | 18,2 | 0,1 | | | 4,2 | | 2,9 | 0,3 | 2,1 | 0,8 | 1,8 | 3,4 | 0,4 | 0,7 | 3,1 | 0,2 | |

Note:
Confidential : AT, CZ, DK
Not available :AT, DE, FI, FR, LT, LU, NL, NO, SE, UK
USP only :CH
Single piece only :BG, CH, LV
Authorized postal service providers only : PT
General Authorisations only: EL
Non Universal Services: IE

Unlike other postal services, volumes of express per capita are growing quickly in most of the countries. The use of express is particularly intense in BG and HR.

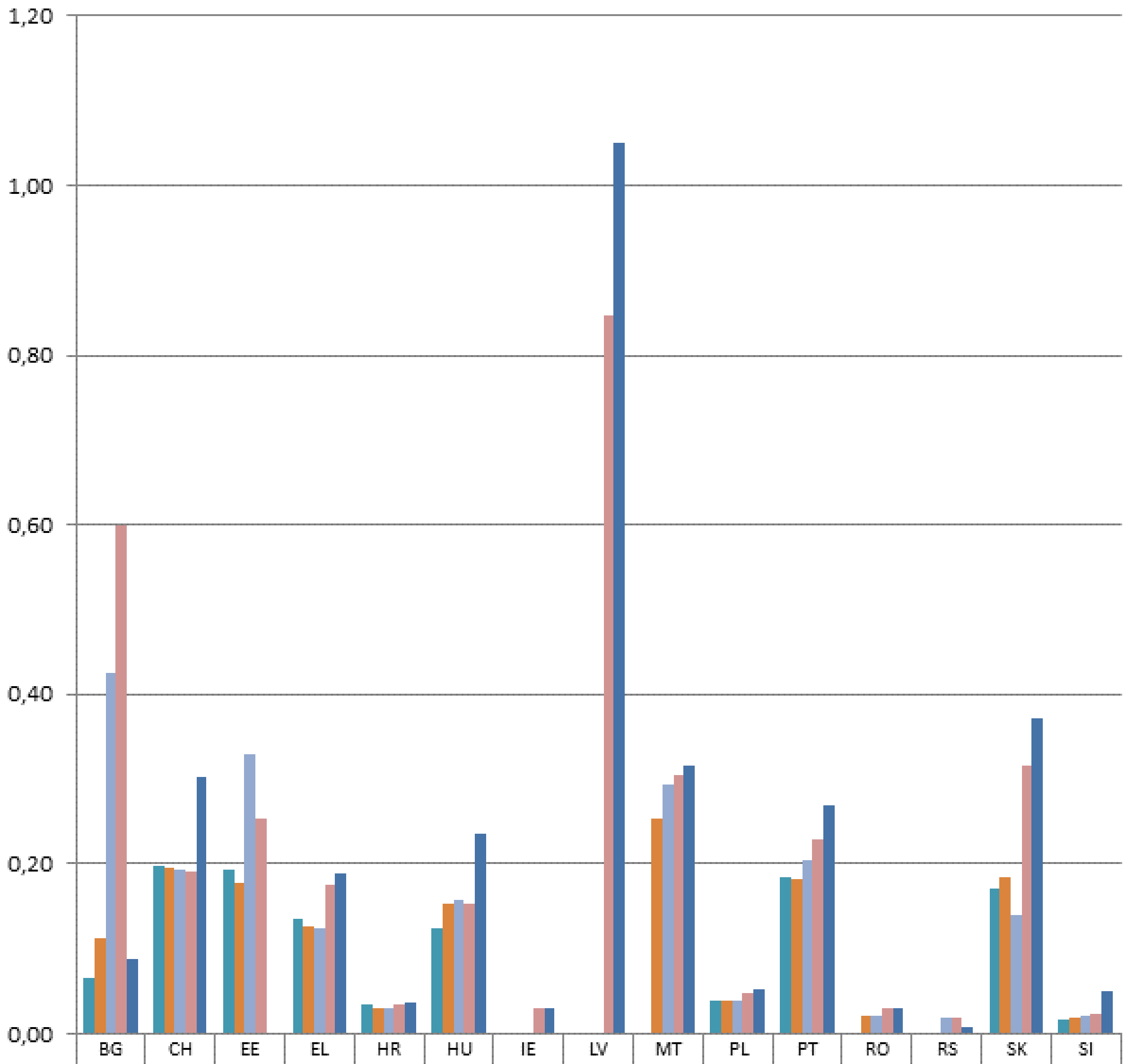
**Figure 24– Express domestic items per capita**




| | BG | CH | EE | FR | EL | HR | HU | IE | LV | MT | PL | PT | RO | RS | SK | SI |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 17,1 | 0,4 | 1,6 | 5,1 | 4,2 | 9,5 | 1,6 | | | | 1,1 | 1,7 | 0,8 | | 1,1 | 0,1 |
| 2009 | 17,7 | 0,4 | 1,4 | 5,1 | 4,1 | 10,7 | 1,8 | | | 0,1 | 1,4 | 2,1 | 0,4 | | 1,9 | 0,2 |
| 2010 | 19,1 | 0,3 | 1,8 | 5,4 | 4,0 | 15,6 | 2,0 | | | 0,2 | 1,6 | 2,5 | 0,4 | 0,5 | 2,8 | 0,2 |
| 2011 | 18,9 | 0,3 | 2,0 | 5,7 | 4,2 | 16,8 | 2,1 | 0,3 | 0,9 | 0,2 | 1,6 | 2,5 | 0,6 | 0,6 | 2,7 | 0,2 |
| 2012 | 18,7 | 0,3 | | 5,9 | 4,0 | 18,1 | 2,7 | 0,2 | 1,1 | 0,4 | 1,7 | 3,1 | 0,4 | 0,7 | 2,8 | 0,2 |

Note:
Confidential : AT, CZ, DK, IT
Not available :AT, BE, CY, DE, ES, FI,FY, LT, LU, NL, NO, SE, UK
USP only :CH
Single piece only :BG, CH, LV
Authorized postal service providers only : PT
General Authorisations only: EL
Non Universal Services: IE

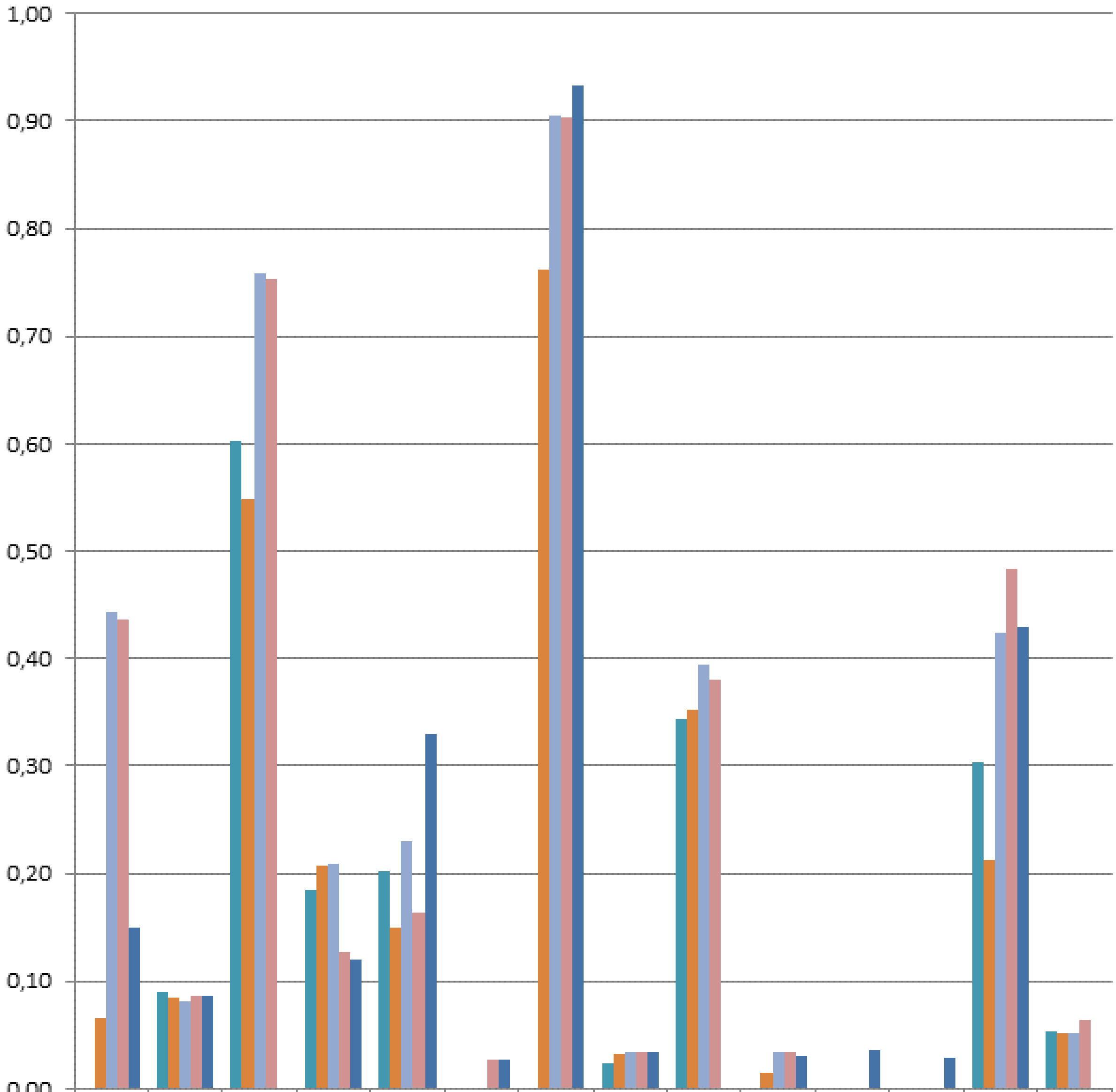
**Figure 25– Express international outbound per capita**




| | BG | CH | EE | EL | HR | HU | IE | LV | MT | PL | PT | RO | RS | SK | SI |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 0,07 | 0,20 | 0,19 | 0,13 | 0,03 | 0,12 | | | | 0,04 | 0,18 | | | 0,17 | 0,02 |
| 2009 | 0,11 | 0,19 | 0,18 | 0,13 | 0,03 | 0,15 | | | 0,25 | 0,04 | 0,18 | 0,02 | | 0,18 | 0,02 |
| 2010 | 0,43 | 0,19 | 0,33 | 0,12 | 0,03 | 0,16 | | | 0,29 | 0,04 | 0,20 | 0,02 | 0,02 | 0,14 | 0,02 |
| 2011 | 0,60 | 0,19 | 0,25 | 0,18 | 0,03 | 0,15 | 0,03 | 0,85 | 0,30 | 0,05 | 0,23 | 0,03 | 0,02 | 0,32 | 0,02 |
| 2012 | 0,09 | 0,30 | | 0,19 | 0,04 | 0,24 | 0,03 | 1,05 | 0,32 | 0,05 | 0,27 | 0,03 | 0,01 | 0,37 | 0,05 |

Note:
Confidential : CZ
Not available :AT, BE, CY, DK, DE, ES, FI, FR, FY, LT, LU, NL, NO, SE, UK
USP only :CH
Single piece only :BG, CH, LV
Authorized postal service providers only : PT
General Authorisations only: EL
Non Universal Services: IE

**Figure 26– Express international inbound per capita**




| | BG | HR | EE | EL | HU | LU | MT | PL | PT | RO | RS | SI | SK | CH |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | | 0,09 | 0,60 | 0,19 | 0,20 | | | 0,02 | 0,34 | | | | 0,30 | 0,05 |
| 2009 | 0,06 | 0,08 | 0,55 | 0,21 | 0,15 | | 0,76 | 0,03 | 0,35 | 0,02 | | | 0,21 | 0,05 |
| 2010 | 0,44 | 0,08 | 0,76 | 0,21 | 0,23 | | 0,91 | 0,03 | 0,39 | 0,03 | | | 0,42 | 0,05 |
| 2011 | 0,44 | 0,09 | 0,75 | 0,13 | 0,16 | 0,03 | 0,90 | 0,03 | 0,38 | 0,03 | | | 0,48 | 0,06 |
| 2012 | 0,15 | 0,09 | | 0,12 | 0,33 | 0,03 | 0,93 | 0,03 | | 0,03 | 0,04 | 0,03 | 0,43 | |

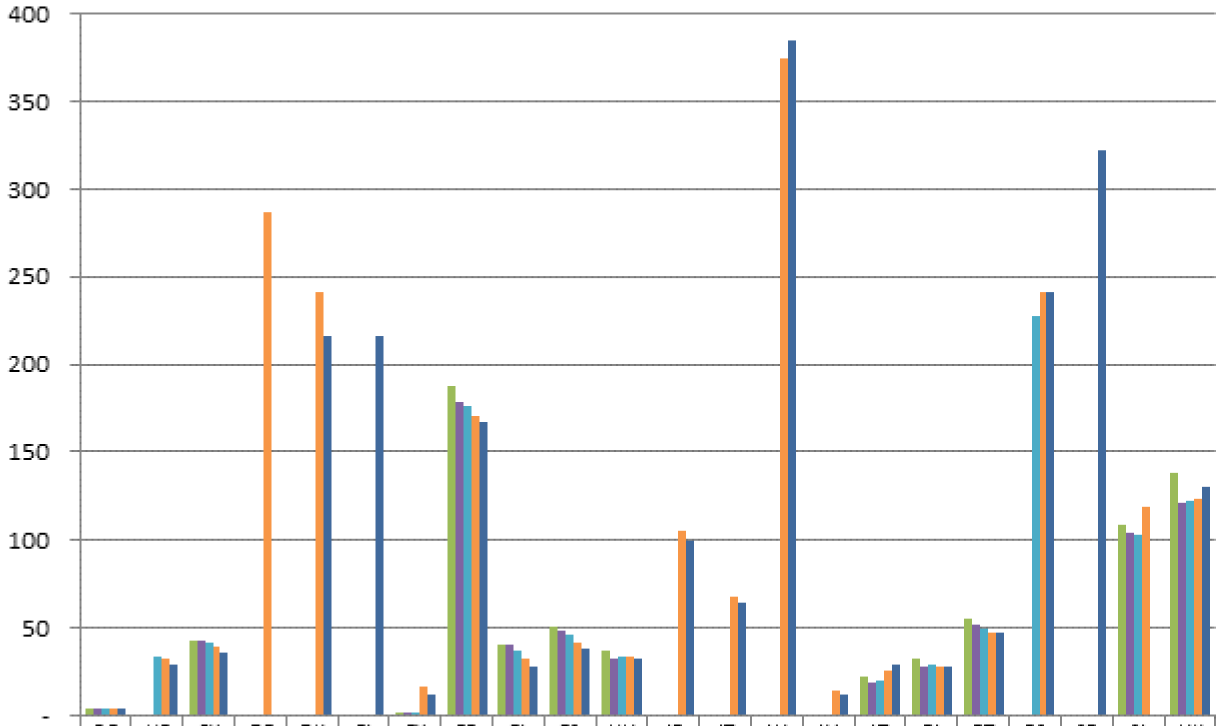
Note:
Confidential : CZ
Not available :AT, BE, CY, DK, DE, ES, FI,FR, FY, IE, LT, LV, NO, NL, SE, UK
USP only :CH
Single piece only :BG
Authorized postal service providers only : PT
General Authorisations only: EL

## 10. Revenues

The following section examines the trends in revenue for those countries that were able to provide data for the categories specified in the questionnaire.

For the countries where the Euro is not the national currency, the data were converted to Euros . The average exchange rate as published by Eurostat was used for each year. For instance, the figures for 2008 were converted using the average exchange rate for 2008, and the figures for 2009 were converted using the average exchange rate for 2009 and so on. This means that, for the countries which use the Euro, the figures presented are nominal, while for the countries where the Euro is not used, differences in revenues between years may be due to the evolution of exchange rates.

**Figure 27 –Total revenues per capita in € (excluding express)**



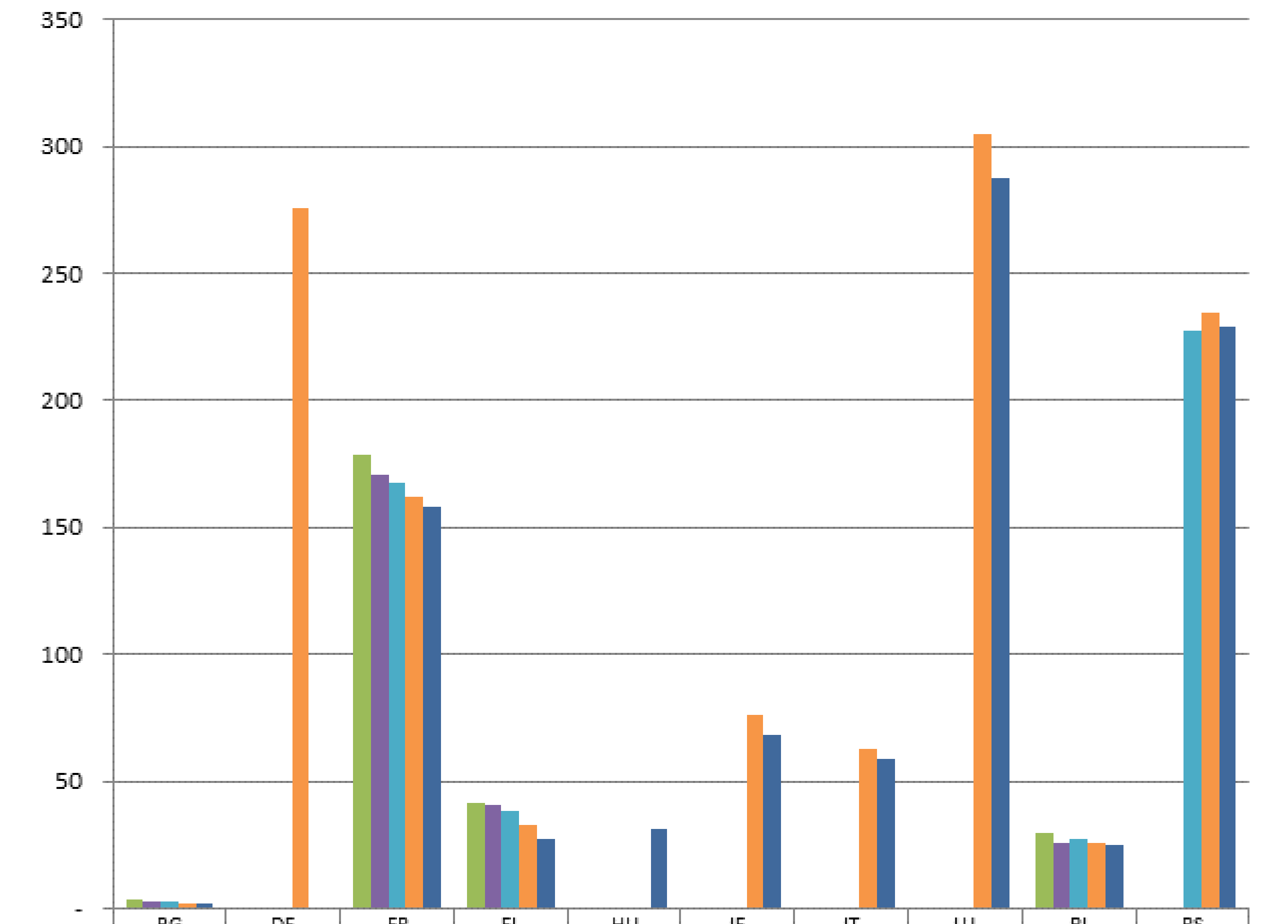

| | BG | HR | CY | DE | DK | FI | FY | FR | EL | ES | HU | IE | IT | LU | LV | LT | PL | PT | RS | SE | SI | UK |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 4 | | 43 | | | | 0 | 187 | 40 | 51 | 37 | | | | | 22 | 32 | 55 | | | 108 | 139 |
| 2009 | 4 | | 43 | | | | 0 | 179 | 40 | 48 | 32 | | | | | 19 | 28 | 52 | | | 105 | 121 |
| 2010 | 4 | 34 | 42 | | | | 1 | 176 | 37 | 47 | 34 | | | | | 20 | 29 | 50 | 227 | | 104 | 122 |
| 2011 | 4 | 33 | 39 | 286 | 241 | | 16 | 170 | 33 | 42 | 33 | 105 | 68 | 375 | 14 | 25 | 28 | 47 | 241 | | 119 | 123 |
| 2012 | 4 | 29 | 35 | | 217 | 216 | 12 | 167 | 28 | 38 | 32 | 99 | 64 | 385 | 12 | 29 | 28 | 48 | 241 | 322 | | 131 |

* Total postal revenues = domestic revenues + international outbound revenues + international inbound revenues.
Note:
Germany (DE) provided data including unaddressed mail for 2008, 2009 and 2010 and Belgium (BE) as well as Norway (NO) provided figures including express. The figures are as follows :

| Country | 2008 | 2009 | 2010 | 2011 | 2012 |
|---|---|---|---|---|---|
| DE | ~ 327 | ~312 | ~339 | | |
| NO | 359 | 328 | 353 | 375 | |
| BE | | | 267 | 276 | 280 |

Confidential :CH, CZ, IE, SK
Not available : EE, NL, RO
USP only : DK, ES, HU,RS
US only :EL, FY
Single piece only :BG, LT, LV

**Figure 28 –Revenues for domestic items, per capita, in € (excluding express)**



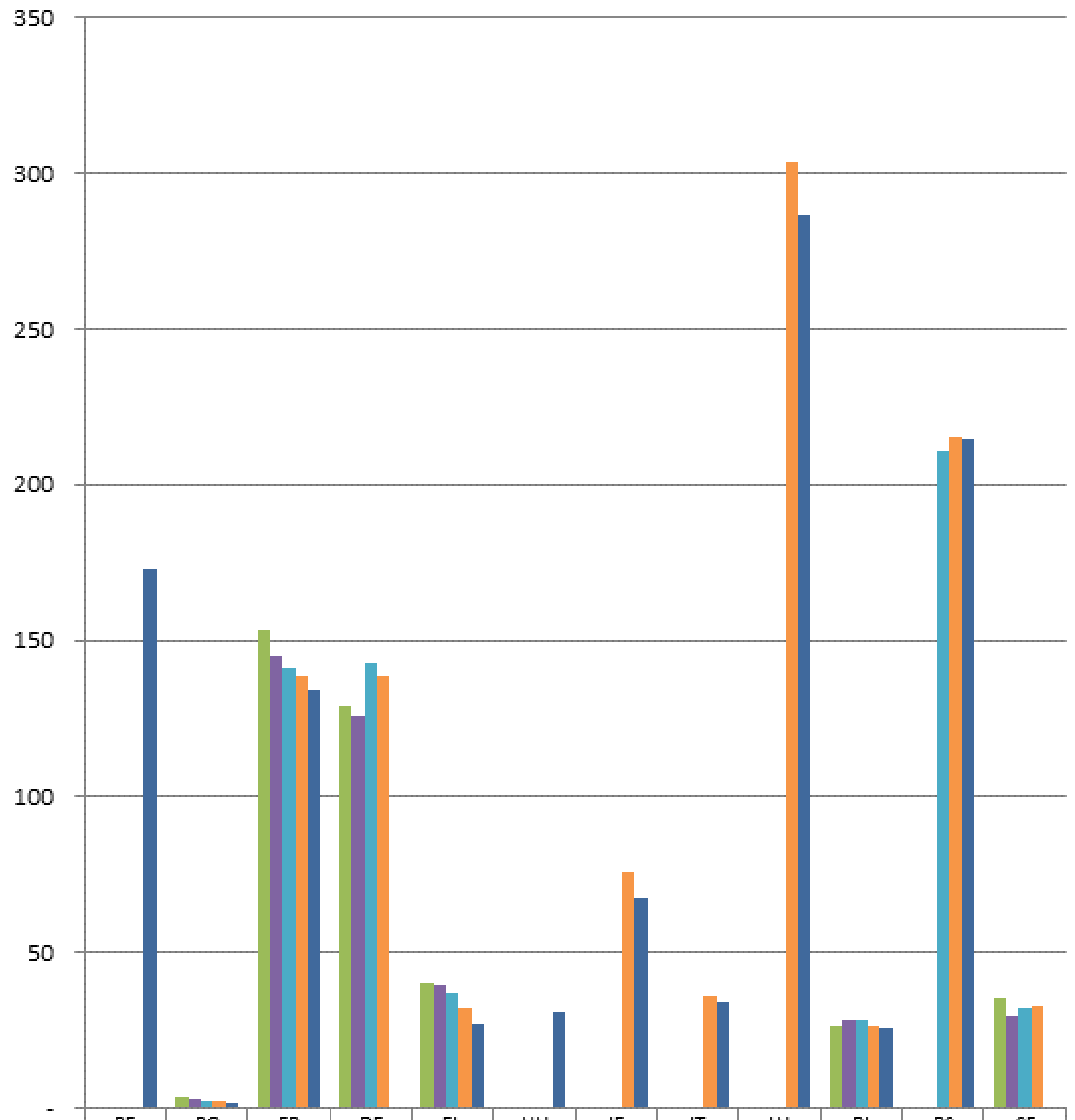

| | BG | DE | FR | EL | HU | IE | IT | LU | PL | RS |
|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 3,6 | | 179,0 | 41,2 | | | | | 29,6 | - |
| 2009 | 2,9 | | 170,4 | 40,7 | | | | | 25,7 | - |
| 2010 | 2,4 | | 167,5 | 38,1 | | | | | 27,2 | 227,3 |
| 2011 | 2,3 | 275,3 | 162,0 | 32,8 | | 76,3 | 62,5 | 305,0 | 25,7 | 235,0 |
| 2012 | 2,0 | | 158,3 | 27,3 | 31,0 | 68,6 | 59,0 | 287,9 | 25,0 | 229,5 |

Belgium (BE) and Norway (NO) provided figures including express. The figures are as follows :

| Country | 2008 | 2009 | 2010 | 2011 | 2012 |
|---|---|---|---|---|---|
| BE | | | 247 | 255 | 257 |
| NO | 330 | 297 | 317 | 349 | |

Note:
Confidential : AT, CH, CZ, DK, MT, NL, SK, UK
Not available : AT, BE, DE, CY, EE, ES, FI, FY,HR, LT, LV, PT, RO, SE, SI
USP only : RS
US only :EL, Single piece only: BG

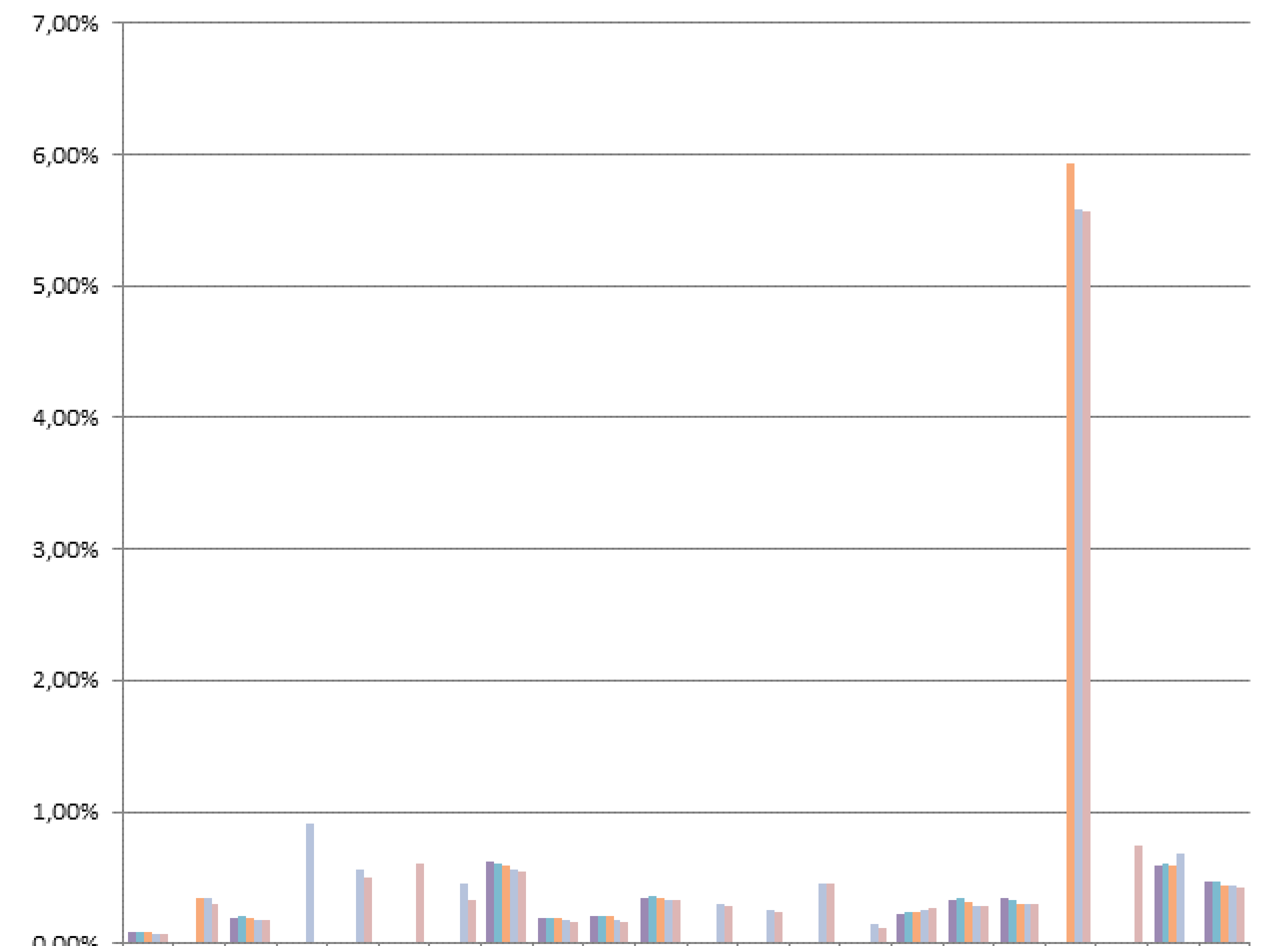
**Figure 29 –Revenues for letter post items, per capita, in € (excluding express)**




| | BE | BG | FR | DE | EL | HU | IE | IT | LU | PL | RS | SE |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | | 3,4 | 153,4 | 128,9 | 40,4 | | | | | 26,6 | - | 35,0 |
| 2009 | | 2,7 | 145,0 | 125,6 | 39,8 | | | | | 28,1 | - | 29,7 |
| 2010 | | 2,3 | 140,9 | 143,0 | 37,2 | | | | | 28,1 | 211,2 | 32,3 |
| 2011 | | 2,0 | 138,7 | 138,3 | 32,1 | | 76 | 35,92 | 303,6 | 26,2 | 215,1 | 32,6 |
| 2012 | 173 | 1,8 | 134,4 | | 26,8 | 30,99 | 68 | 33,69 | 286,3 | 25,9 | 214,8 | |

Note:
Confidential : AT, CH, CZ, SK, UK
Not available : AT, BE, CY, DK, EE, ES, FI, FY, HR, LT, LV, NL, NO, PT, RO, SE, SI
USP only :RS
US only :EL
Single piece only : BG

**Figure 30– Total revenues (excluding express) as % of the GDP***




| | BG | HR | CY | DE | DK | FI | FY | FR | EL | ES | HU | IE | IT | LU | LV | LT | PL | PT | RS | SE | SI | UK |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 0,09 | | 0,20 | | | | 0,01 | 0,62 | 0,19 | 0,21 | 0,35 | | | | | 0,23 | 0,34 | 0,34 | | | 0,59 | 0,47 |
| 2009 | 0,09 | | 0,20 | | | | 0,01 | 0,61 | 0,20 | 0,21 | 0,36 | | | | | 0,24 | 0,34 | 0,33 | | | 0,60 | 0,48 |
| 2010 | 0,08 | 0,34 | 0,20 | | | | 0,01 | 0,59 | 0,19 | 0,20 | 0,35 | | | | | 0,25 | 0,32 | 0,31 | 5,94 | | 0,60 | 0,44 |
| 2011 | 0,07 | 0,34 | 0,18 | 0,90 | 0,56 | | 0,45 | 0,55 | 0,18 | 0,18 | 0,33 | 0,30 | 0,26 | 0,45 | 0,14 | 0,25 | 0,29 | 0,29 | 5,58 | | 0,67 | 0,44 |
| 2012 | 0,07 | 0,30 | 0,17 | | 0,49 | 0,61 | 0,33 | 0,54 | 0,16 | 0,17 | 0,33 | 0,28 | 0,24 | 0,45 | 0,11 | 0,27 | 0,28 | 0,30 | 5,57 | 0,75 | | 0,43 |

* Figures calculated by dividing the total revenues (excluding express) per the GDP of each year (source: Eurostat).

Belgium (BE) provided figures including express. The figures are as follows :

| Country | 2008 | 2009 | 2010 | 2011 |
|---|---|---|---|---|
| BE | | 0,81 | 0,82 | 0,82 |

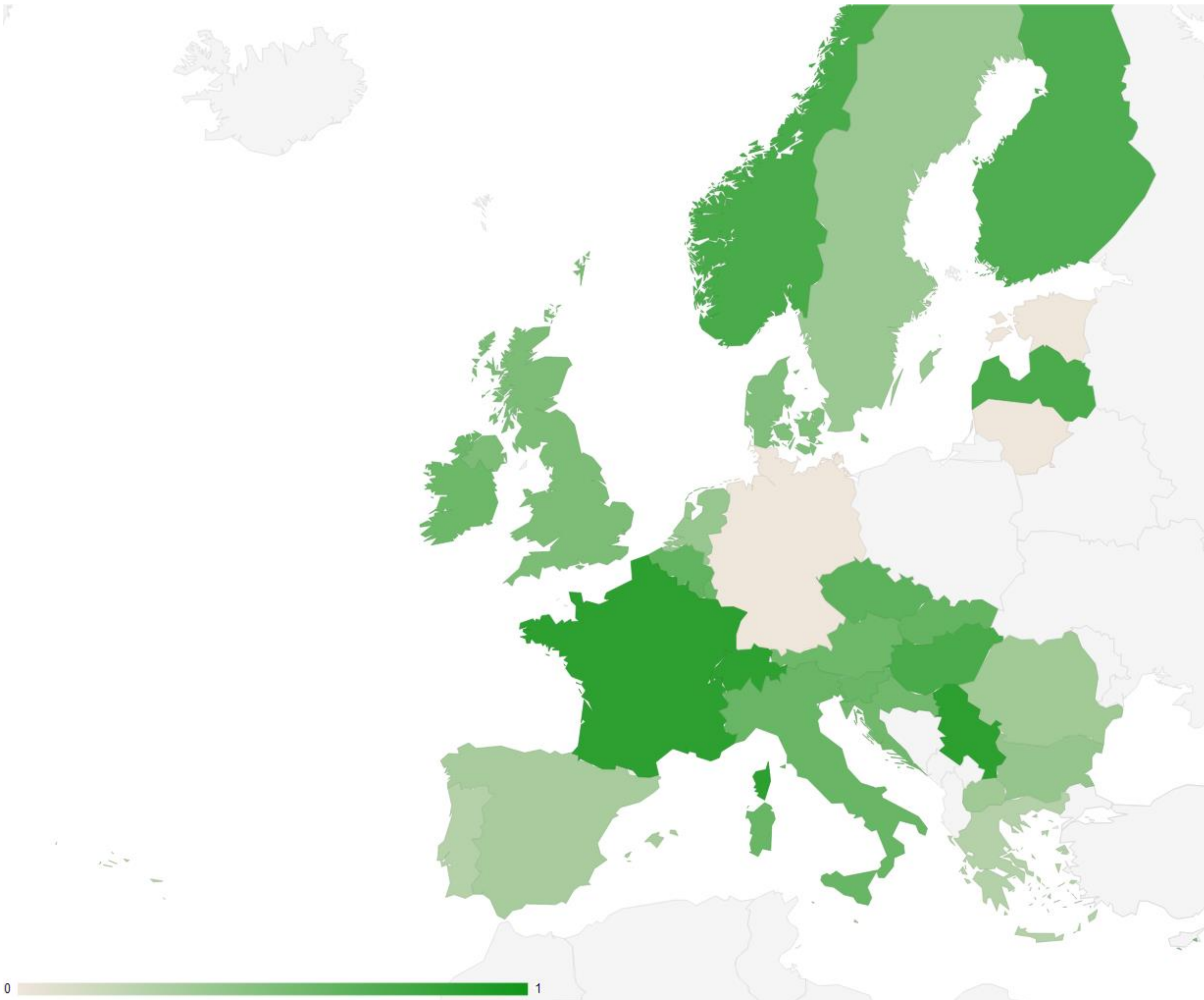
## 12. Employment in the postal sector

Figure 31 shows the proportion of total employment in each member state which is accounted for by the USP in 2012. In all cases, this is less than 1% of total employment.

Of the member states that provided information for 2012, the country with the highest proportion of total employment accounted for by the USP was Serbia (0.87%) followed by Switzerland (0.86%).

Data for 2012 has not been provided by Germany, Estonia, Iceland and Lithuania.

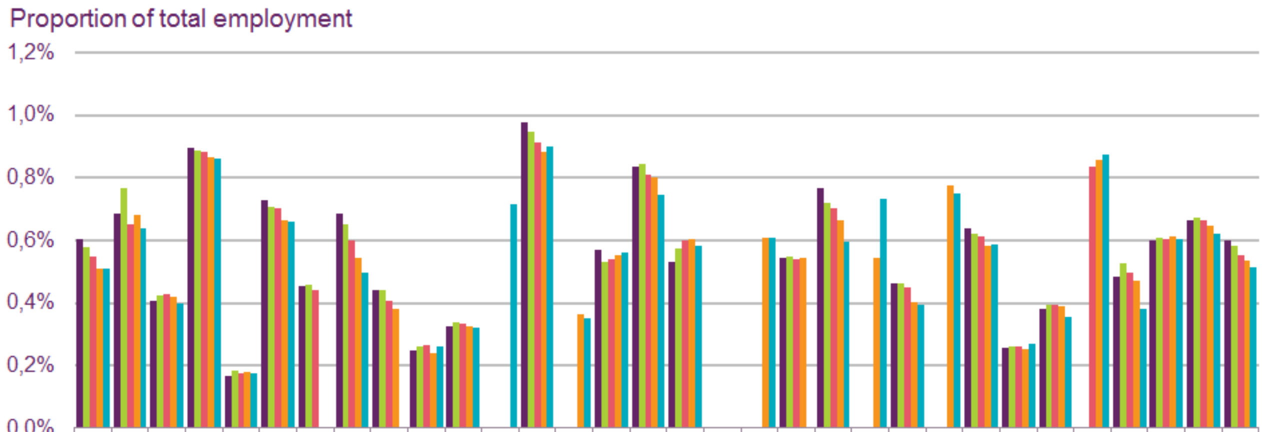
**Figure 31 - Persons employed by the USP as a proportion of total employment: 2012**




*Source: NRAs / population data from Eurostat / mapping chart created using Google API. Employment data for Serbia is from The Statistical Office of the Republic of Serbia. Note: Data differs between headcount and FTE and this is not always specified. The method of recording employment will also differ between NRAs and Eurostat. Therefore, this chart should be considered as indicative only. There is no geocoding for CY or MT in Google API, so these cannot be shown on the chart. The data used to create this chart is available in Annex.*

In most cases, the proportion of the total workforce that is employed by the USP has fallen over the past five years, as Figure 32 shows. This decline is most prominent in Austria, Denmark, Estonia, Slovakia, Sweden and the UK - although please note that total employment by the USP in all cases is less than 1% of the total workforce in each member state. In the other countries, employment by the USP as a proportion of total employment was relatively unchanged.

**Figure 32 - Persons employed by the USP as a proportion of total employment in each member state: 2008-2012**




| | AT | BE | BG | CH | CY | CZ | DE | DK | EE | EL | ES | FI | FR | FY | HR | HU |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 0,6 | 0,7 | 0,4 | 0,9 | 0,2 | 0,7 | 0,5 | 0,7 | 0,4 | 0,2 | 0,3 | | 1,0 | | 0,6 | 0,8 |
| 2009 | 0,6 | 0,8 | 0,4 | 0,9 | 0,2 | 0,7 | 0,5 | 0,7 | 0,4 | 0,3 | 0,3 | | 0,9 | | 0,5 | 0,8 |
| 2010 | 0,6 | 0,7 | 0,4 | 0,9 | 0,2 | 0,7 | 0,4 | 0,6 | 0,4 | 0,3 | 0,3 | | 0,9 | | 0,5 | 0,8 |
| 2011 | 0,5 | 0,7 | 0,4 | 0,9 | 0,2 | 0,7 | | 0,5 | 0,4 | 0,2 | 0,3 | | 0,9 | 0,4 | 0,6 | 0,8 |
| 2012 | 0,5 | 0,6 | 0,4 | 0,9 | 0,2 | 0,7 | | 0,5 | | 0,3 | 0,3 | 0,7 | 0,9 | 0,4 | 0,6 | 0,7 |

| | IE | IS | IT | LT | LU | LV | NL | NO | PL | PT | RO | RS | SE | SI | SK | UK |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 0,5 | | | 0,5 | 0,8 | | 0,5 | | 0,6 | 0,3 | 0,4 | | 0,5 | 0,6 | 0,7 | 0,6 |
| 2009 | 0,6 | | | 0,5 | 0,7 | | 0,5 | | 0,6 | 0,3 | 0,4 | | 0,5 | 0,6 | 0,7 | 0,6 |
| 2010 | 0,6 | | | 0,5 | 0,7 | | 0,4 | | 0,6 | 0,3 | 0,4 | 0,8 | 0,5 | 0,6 | 0,7 | 0,6 |
| 2011 | 0,6 | | 0,6 | 0,5 | 0,7 | 0,5 | 0,4 | 0,8 | 0,6 | 0,3 | 0,4 | 0,9 | 0,5 | 0,6 | 0,6 | 0,5 |
| 2012 | 0,6 | | 0,6 | | 0,6 | 0,7 | 0,4 | 0,7 | 0,6 | 0,3 | 0,4 | 0,9 | 0,4 | 0,6 | 0,6 | 0,5 |

*Source: NRAs. Employment data from Eurostat. Employment data for Serbia is from The Statistical Office of the Republic of Serbia. Note: Data differs between headcount and FTE and this is not always specified. The method of recording employment will also differ between NRAs and Eurostat, and the Statistical Office of the Republic of Serbia. Therefore, this chart should be considered as indicative only. Data in FTE: CH, DK, NL,IE (2010,2011); Data as headcount: UK, HU ; Not specified: BE, BG, CZ, DE, EE, EL, ES, FI, FY, HR, IT, LT, LU, LV, MT, PL, PT, RO, RS, SE, SI, SK; Values for IT include total people employed in other business units, such as financial services. Information for MT is confidential and not included. The data used to create this chart is available in Annex.*

When employment from other postal providers is also considered, the proportion of the total workforce employed in postal services has increased in Cyprus and Croatia.

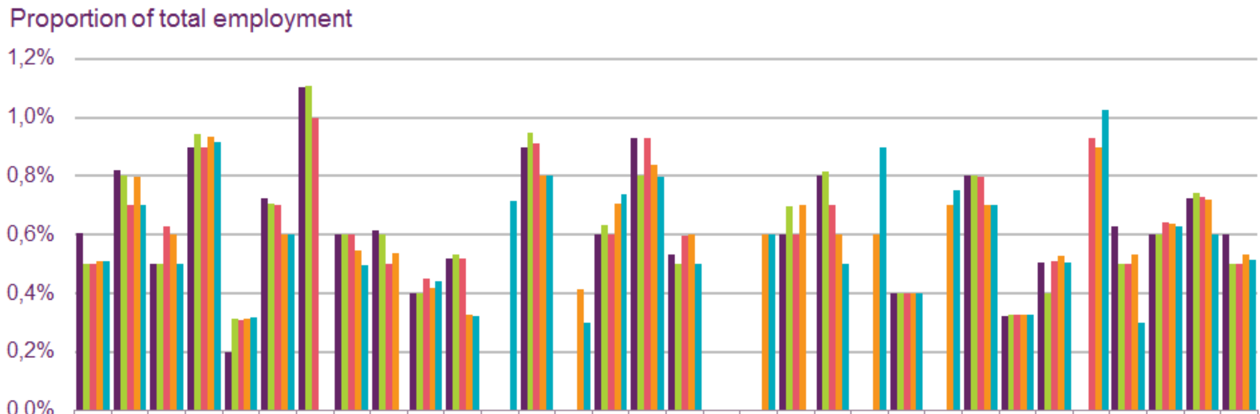
In Croatia, the number of people employed by the USP has fallen since 2008 but the number of people employed by other providers has grown, rising from 1,529 in 2008 to 2,277 in 2012 – an increase of almost 50%. While the aggregate change in employment is relatively small (a 3% fall from 2008-2012), the number of people employed in Croatia has fallen by 12% over the same period, increasing the share of total employment accounted for by the postal sector.

The largest declines in the proportion of the total workforce employed in postal services were in Denmark, Hungary and Sweden. Between 2008 and 2012, employment by the USP has fallen by 32% in Denmark, far faster than the total number of people employed (Eurostat figures indicate that this is 5.8%).

In Sweden, the number of people employed by the USP fell by one fifth, as Post Nord reacted to falling mail volumes by reorganising the business. Figures were not available on the number of people employed by other postal services providers.

The number of people employed in postal services in Slovakia decreased by 10% between 2008 and 2012, despite growth in the number of people employed by other operators growing between 2008 and 2011.[8]

**Figure 33 - Persons employed in postal services as a proportion of total employment in each member state: 2008-2012**




| | AT | BE | BG | CH | CY | CZ | DE | DK | EE | EL | ES | FI | FR | FY | HR | HU | IE | IS | IT | LT | LU | LV | NL | NO | PL | PT | RO | RS | SE | SI | SK | UK |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 0,6 | 0,8 | 0,5 | 0,9 | 0,2 | 0,7 | 1,1 | 0,6 | 0,6 | 0,4 | 0,5 | | 0,9 | | 0,6 | 0,9 | 0,5 | | | 0,6 | 0,8 | | 0,4 | | 0,8 | 0,3 | 0,5 | | 0,6 | 0,6 | 0,7 | 0,6 |
| 2009 | 0,5 | 0,8 | 0,5 | 0,9 | 0,3 | 0,7 | 1,1 | 0,6 | 0,6 | 0,4 | 0,5 | | 0,9 | | 0,6 | 0,8 | 0,5 | | | 0,7 | 0,8 | | 0,4 | | 0,8 | 0,3 | 0,4 | | 0,5 | 0,6 | 0,7 | 0,5 |
| 2010 | 0,5 | 0,7 | 0,6 | 0,9 | 0,3 | 0,7 | 1,0 | 0,6 | 0,5 | 0,4 | 0,5 | | 0,9 | | 0,6 | 0,9 | 0,6 | | | 0,6 | 0,7 | | 0,4 | | 0,8 | 0,3 | 0,5 | 0,9 | 0,5 | 0,6 | 0,7 | 0,5 |
| 2011 | 0,5 | 0,8 | 0,6 | 0,9 | 0,3 | 0,6 | | 0,5 | 0,5 | 0,4 | 0,3 | | 0,8 | 0,4 | 0,7 | 0,8 | 0,6 | | 0,6 | 0,7 | 0,6 | 0,6 | 0,4 | 0,7 | 0,7 | 0,3 | 0,5 | 0,9 | 0,5 | 0,6 | 0,7 | 0,5 |
| 2012 | 0,5 | 0,7 | 0,5 | 0,9 | 0,3 | 0,6 | | 0,5 | | 0,4 | 0,3 | 0,7 | 0,8 | 0,3 | 0,7 | 0,8 | 0,5 | | 0,6 | | 0,5 | 0,9 | 0,4 | 0,7 | 0,7 | 0,3 | 0,5 | 1,0 | 0,3 | 0,6 | 0,6 | 0,5 |

*Source: NRAs. Employment data from Eurostat. Note: Data differs between headcount and FTE and this is not always specified. The method of recording employment will also differ between NRAs and Eurostat. Therefore, this chart should be considered as indicative only. Data in FTE: CH, DK, NL,IE, MT(other providers); Data as headcount: UK, HU ; Not specified: BE, BG, CZ, DE, EE, EL, ES, FI, FY, HR, IT, LT, LU, LV, MT (USP), PL, PT, RO, RS, SE, SI, SK; Values for IT include total people employed in other business units of the USP, such as financial services, and other providers includes postal services employees only. USP only for AT, CZ, DK, ES, IE, FI, NL, UK. Other providers data for CH excludes courier and express. Information for MT is confidential and not included. The data used to create this chart is available in Annex.*

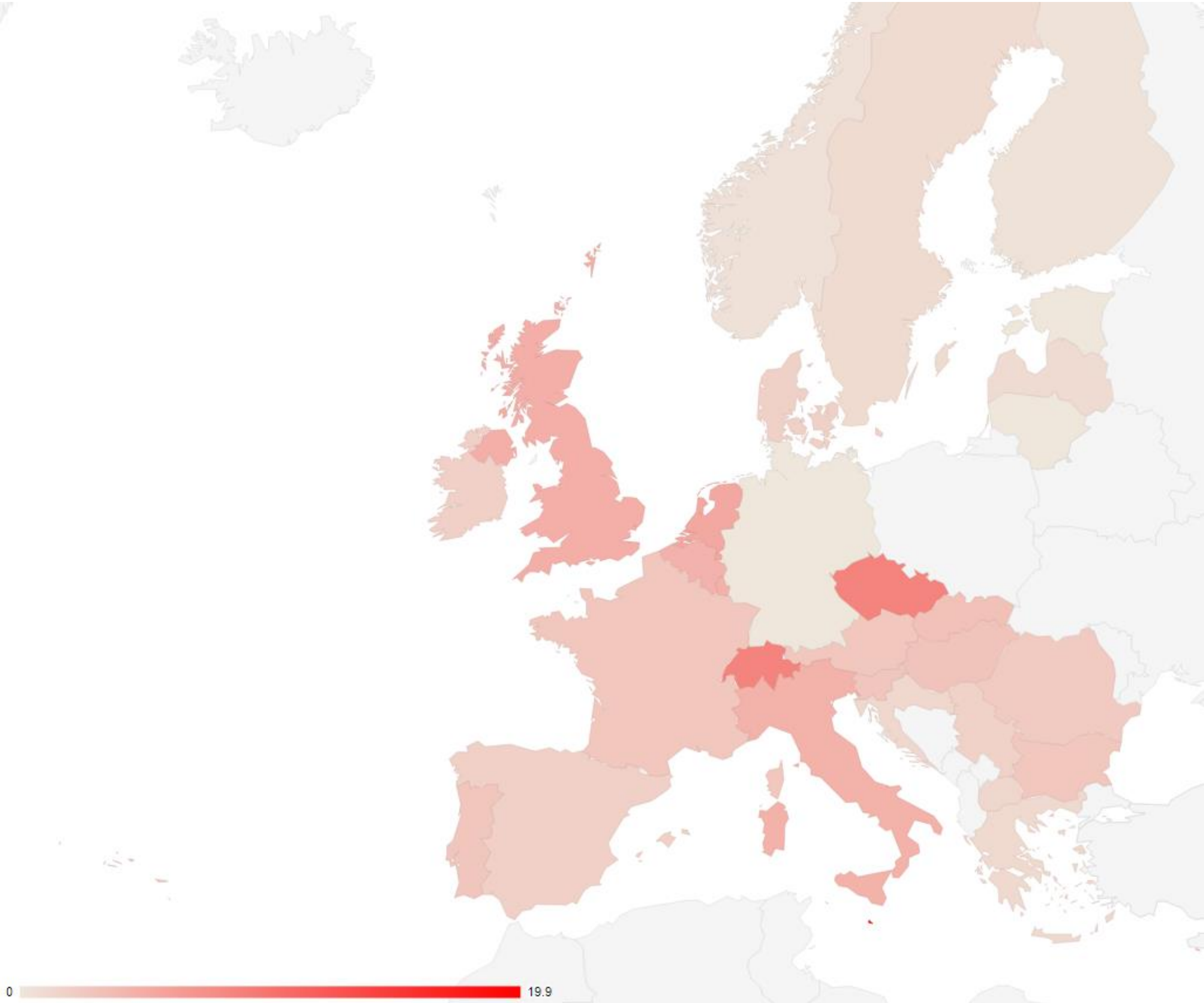
[8] The numbers in **Error! Reference source not found.** do not include contract workers for Slovakia for comparability with previous years. In 2012, one operator with 3,000 contract employees ceased its activities, which represents a 25% fall in the number of contract workers employed by operators other than the USP.

## 13. Postal network indicators

The following section looks at the density of postal establishments in each member state, shown as postal establishments per 1000 people and per 100 square kilometer.

Of the member states that provided information for 2012, the country with the highest density of postal establishments was Malta (19.9 postal establishments per 100 $km^2$) followed by the Czech Republic (8.5 postal establishments per $100km^2$) and the Netherlands (5.3 postal establishments per $100km^2$). Data for 2012 has not been provided by Germany, Estonia, Iceland, and Lithuania.

**Figure 34 - USP postal establishments per 100 km2: 2012**

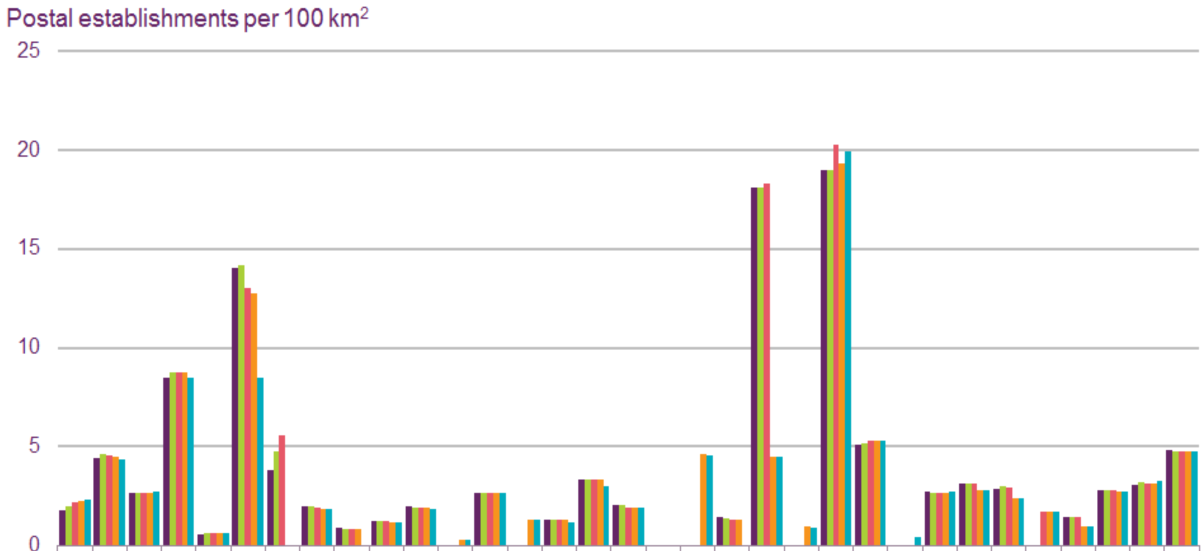



*Source: NRAs / area data from Eurostat / mapping chart created using Google API.*

*Note: There is no geocoding for CY or MT in Google API, so these cannot be shown on the chart. The data used to create this chart is available in Annex.*

Between 2008 and 2012, the density of postal establishments has remained relatively stable among all of the countries who have provided data, with the exception of the Czech Republic, where the number of postal establishments per km$^2$ fell by 5.5 between 2008 and 2012. In its response to the ERGP questionnaire, it is noted that there has been a strong decrease in the number of delivery postmen offering basic services.[9]

**Figure 35 - Postal establishments per 100 km2, USP only: 2008-2012**




| | AT | BE | BG | CH | CY | CZ | DE | DK | EE | EL | ES | FI | FR | FY | HR | HU | IE | IS | IT | LT | LU | LV | MT | NL | NO | PL | PT | RO | RS | SE | SI | SK | UK |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 1,8 | 4,4 | 2,7 | 8,5 | 0,6 | 14,0 | 3,8 | 2,0 | 0,9 | 1,2 | 2,0 | | 2,7 | | 1,3 | 3,3 | 2,0 | | | 1,5 | 18,1 | | 19,0 | 5,1 | | 2,7 | 3,1 | 2,9 | | 1,4 | 2,8 | 3,1 | 4,8 |
| 2009 | 2,0 | 4,6 | 2,7 | 8,7 | 0,6 | 14,2 | 4,8 | 2,0 | 0,8 | 1,2 | 1,9 | | 2,7 | | 1,3 | 3,3 | 2,0 | | | 1,3 | 18,1 | | 19,0 | 5,2 | | 2,7 | 3,1 | 3,0 | | 1,5 | 2,8 | 3,2 | 4,8 |
| 2010 | 2,2 | 4,6 | 2,7 | 8,7 | 0,6 | 13,0 | 5,6 | 1,9 | 0,9 | 1,2 | 1,9 | | 2,7 | | 1,3 | 3,3 | 1,9 | | | 1,3 | 18,3 | | 20,3 | 5,3 | | 2,7 | 3,1 | 2,9 | 1,7 | 1,5 | 2,8 | 3,2 | 4,8 |
| 2011 | 2,2 | 4,5 | 2,7 | 8,7 | 0,6 | 12,8 | | 1,9 | 0,8 | 1,2 | 1,9 | 0,3 | 2,7 | 1,3 | 1,3 | 3,4 | 1,9 | | 4,6 | 1,3 | 4,5 | 1,0 | 19,3 | 5,3 | | 2,7 | 2,8 | 2,4 | 1,7 | 1,0 | 2,8 | 3,1 | 4,8 |
| 2012 | 2,3 | 4,4 | 2,7 | 8,5 | 0,6 | 8,5 | | 1,9 | | 1,1 | 1,9 | 0,3 | 2,7 | 1,3 | 1,2 | 3,0 | 1,9 | | 4,5 | | 4,5 | 0,9 | 19,9 | 5,3 | 0,4 | 2,7 | 2,8 | 2,4 | 1,7 | 1,0 | 2,7 | 3,2 | 4,7 |

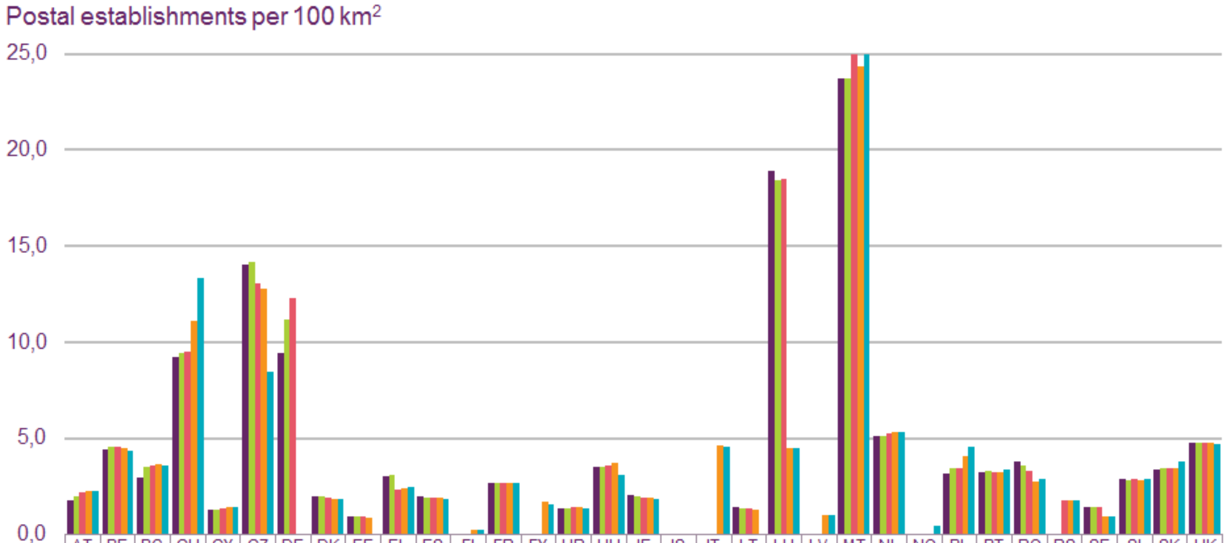
*Source: NRAs. Population data from Eurostat.*
*Note: SE includes number of rural delivery routes; SK includes data about delivery operatives who collect items; DE figures are estimates. The data used to create this chart is available in Annex.*

The density of total postal establishments (the sum of those operated by the USP and those operated by other providers) has increased in Malta (by 1.3 postal establishments per 100km$^2$) and in Poland (by 1.4 postal establishments per 100km$^2$).

The country with the least postal establishments per 100km$^2$ in 2012 is Norway, but this figure refers to the USP only. In 2011, Finland had fewer postal establishments per 100km$^2$ (0.3). This figure also refers to the USP only.

[9] Known as "mailman 2"

**Figure 36 - Postal establishments per 100 km2, USP and other providers: 2008-2012**




| | AT | BE | BG | CH | CY | CZ | DE | DK | EE | EL | ES | FI | FR | FY | HR | HU | IE |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 1,8 | 4,4 | 2,9 | 9,2 | 1,3 | 14,0 | 9,4 | 2,0 | 1,0 | 3,1 | 2,0 | | 2,7 | | 1,4 | 3,5 | 2,0 |
| 2009 | 2,0 | 4,6 | 3,5 | 9,5 | 1,3 | 14,2 | 11,2 | 2,0 | 0,9 | 3,1 | 1,9 | | 2,7 | | 1,4 | 3,5 | 2,0 |
| 2010 | 2,2 | 4,6 | 3,6 | 9,5 | 1,3 | 13,0 | 12,3 | 1,9 | 1,0 | 2,4 | 1,9 | | 2,7 | | 1,4 | 3,6 | 1,9 |
| 2011 | 2,2 | 4,5 | 3,7 | 11,1 | 1,4 | 12,8 | | 1,9 | 0,9 | 2,4 | 1,9 | 0,3 | 2,7 | 1,7 | 1,4 | 3,8 | 1,9 |
| 2012 | 2,3 | 4,4 | 3,6 | 13,3 | 1,5 | 8,5 | | 1,9 | | 2,5 | 1,9 | 0,3 | 2,7 | 1,6 | 1,3 | 3,1 | 1,9 |

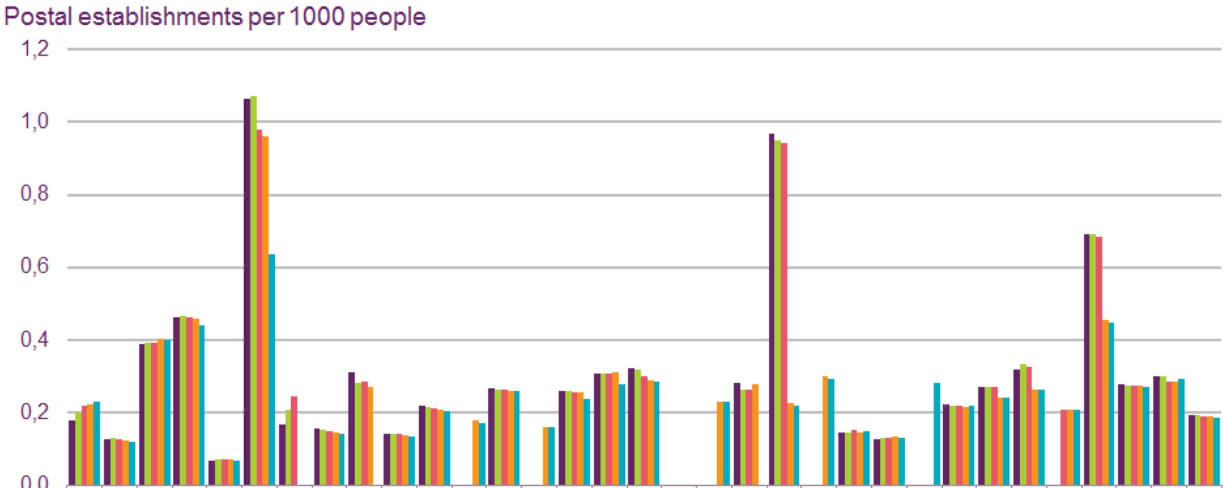
| | IS | IT | LT | LU | LV | MT | NL | NO | PL | PT | RO | RS | SE | SI | SK | UK |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | | | 1,5 | 18,9 | | 23,7 | 5,1 | | 3,2 | 3,3 | 3,8 | | 1,4 | 2,9 | 3,4 | 4,8 |
| 2009 | | | 1,3 | 18,4 | | 23,7 | 5,2 | | 3,4 | 3,3 | 3,6 | | 1,5 | 2,9 | 3,4 | 4,8 |
| 2010 | | | 1,3 | 18,5 | | 25,0 | 5,3 | | 3,5 | 3,3 | 3,3 | 1,8 | 1,5 | 2,9 | 3,4 | 4,8 |
| 2011 | | 4,6 | 1,3 | 4,5 | 1,0 | 24,4 | 5,3 | | 4,1 | 3,3 | 2,8 | 1,8 | 1,0 | 2,8 | 3,4 | 4,8 |
| 2012 | | 4,5 | | 4,5 | 1,0 | 25,0 | 5,3 | 0,4 | 4,6 | 3,4 | 2,9 | 1,8 | 1,0 | 2,9 | 3,8 | 4,7 |

*Source: NRAs. Population data from Eurostat.*

*Note: SE includes number of rural delivery routes; SK includes data about delivery operatives who collect items; DE figures are estimates; USP only:  AT, BE, CZ, DK, FI, FR, IE, IT, LT, NL,NO, SE. CH data for 2012 includes express and courier providers, previous years do not. The data used to create this chart is available in Annex.*

The ratio of postal establishments to people has also remained relatively stable. The country whose USP had the least postal establishments per 1000 people in 2012 was Cyprus (0.07), followed by Belgium (0.12). The Czech Republic (0.64) and Switzerland (0.44) had the most postal establishments per 1000 people.

**Figure 37 - Postal establishments per 1000 head of population, USP only: 2008-2012**




| | AT | BE | BG | CH | CY | CZ | DE | DK | EE | EL | ES | FI | FR | FY | HR | HU |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 0,2 | 0,1 | 0,4 | 0,5 | 0,1 | 1,1 | 0,2 | 0,2 | 0,3 | 0,1 | 0,2 | | 0,3 | | 0,3 | 0,3 |
| 2009 | 0,2 | 0,1 | 0,4 | 0,5 | 0,1 | 1,1 | 0,2 | 0,2 | 0,3 | 0,1 | 0,2 | | 0,3 | | 0,3 | 0,3 |
| 2010 | 0,2 | 0,1 | 0,4 | 0,5 | 0,1 | 1,0 | 0,2 | 0,1 | 0,3 | 0,1 | 0,2 | | 0,3 | | 0,3 | 0,3 |
| 2011 | 0,2 | 0,1 | 0,4 | 0,5 | 0,1 | 1,0 | | 0,1 | 0,3 | 0,1 | 0,2 | 0,2 | 0,3 | 0,2 | 0,3 | 0,3 |
| 2012 | 0,2 | 0,1 | 0,4 | 0,4 | 0,1 | 0,6 | | 0,1 | | 0,1 | 0,2 | 0,2 | 0,3 | 0,2 | 0,2 | 0,3 |

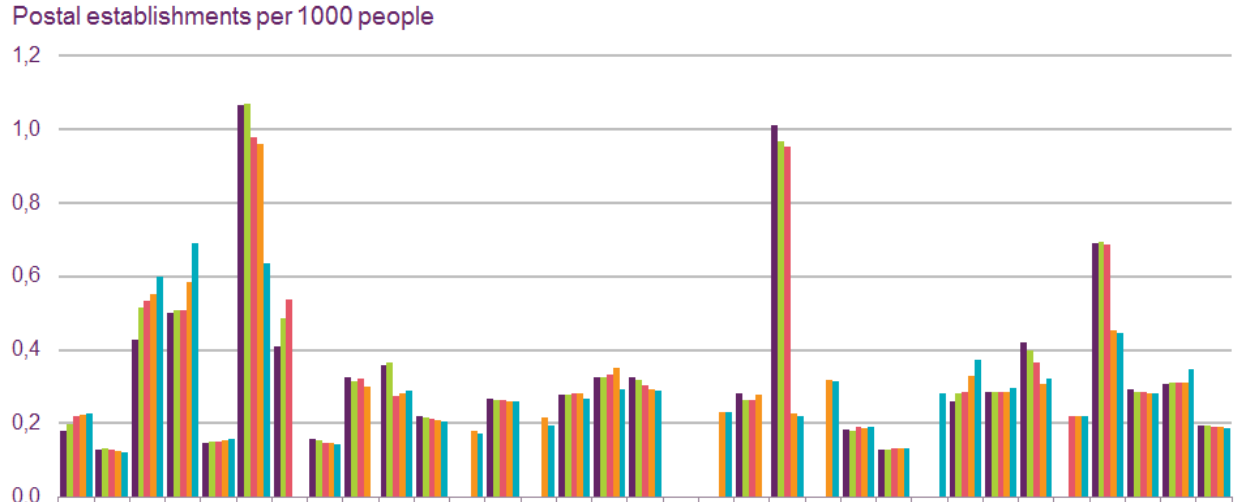
| | IE | IS | IT | LT | LU | LV | MT | NL | NO | PL | PT | RO | RS | SE | SI | SK | UK |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 0,3 | | | 0,3 | 1,0 | | 0,1 | 0,1 | | 0,2 | 0,3 | 0,3 | | 0,7 | 0,3 | 0,3 | 0,2 |
| 2009 | 0,3 | | | 0,3 | 1,0 | | 0,1 | 0,1 | | 0,2 | 0,3 | 0,3 | | 0,7 | 0,3 | 0,3 | 0,2 |
| 2010 | 0,3 | | | 0,3 | 0,9 | | 0,2 | 0,1 | | 0,2 | 0,3 | 0,3 | 0,2 | 0,7 | 0,3 | 0,3 | 0,2 |
| 2011 | 0,3 | | 0,2 | 0,3 | 0,2 | 0,3 | 0,1 | 0,1 | | 0,2 | 0,2 | 0,3 | 0,2 | 0,5 | 0,3 | 0,3 | 0,2 |
| 2012 | 0,3 | | 0,2 | | 0,2 | 0,3 | 0,2 | 0,1 | 0,3 | 0,2 | 0,2 | 0,3 | 0,2 | 0,4 | 0,3 | 0,3 | 0,2 |

*Source: NRAs. Population data from Eurostat.*
*Note: SE includes number of rural delivery routes; SK includes data about delivery operatives who collect items; DE figures are estimates. The data used to create this chart is available in Annex.*

Not all countries were able to provide figures on the number of postal establishments offered by operators other than the USP. Among those that did, Switzerland had the largest increase in the number of postal establishments per 1000 population, but this is due to a change in methodology. The figures for 2012 include courier and express providers, whereas previous years' data did not.

The number of postal establishments for providers other than the USP almost doubled in Slovakia, increasing from 143 to 281.

**Figure 38 - Postal establishments per 1000 head of population, USP and other providers: 2008-2012**




| | AT | BE | BG | CH | CY | CZ | DE | DK | EE | EL | ES | FI | FR | FY | HR | HU | IE | IS | IT | LT | LU | LV | MT | NL | NO | PL | PT | RO | RS | SE | SI | SK | UK |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 0,2 | 0,1 | 0,4 | 0,5 | 0,1 | 1,1 | 0,4 | 0,2 | 0,3 | 0,4 | 0,2 | | 0,3 | | 0,3 | 0,3 | 0,3 | | | 0,3 | 1,0 | | 0,2 | 0,1 | | 0,3 | 0,3 | 0,4 | | 0,7 | 0,3 | 0,3 | 0,2 |
| 2009 | 0,2 | 0,1 | 0,5 | 0,5 | 0,2 | 1,1 | 0,5 | 0,2 | 0,3 | 0,4 | 0,2 | | 0,3 | | 0,3 | 0,3 | 0,3 | | | 0,3 | 1,0 | | 0,2 | 0,1 | | 0,3 | 0,3 | 0,4 | | 0,7 | 0,3 | 0,3 | 0,2 |
| 2010 | 0,2 | 0,1 | 0,5 | 0,5 | 0,2 | 1,0 | 0,5 | 0,1 | 0,3 | 0,3 | 0,2 | | 0,3 | | 0,3 | 0,3 | 0,3 | | | 0,3 | 1,0 | | 0,2 | 0,1 | | 0,3 | 0,3 | 0,4 | 0,2 | 0,7 | 0,3 | 0,3 | 0,2 |
| 2011 | 0,2 | 0,1 | 0,6 | 0,6 | 0,2 | 1,0 | | 0,1 | 0,3 | 0,3 | 0,2 | 0,2 | 0,3 | 0,2 | 0,3 | 0,3 | 0,3 | | 0,2 | 0,3 | 0,2 | 0,3 | 0,2 | 0,1 | | 0,3 | 0,3 | 0,3 | 0,2 | 0,5 | 0,3 | 0,3 | 0,2 |
| 2012 | 0,2 | 0,1 | 0,6 | 0,7 | 0,2 | 0,6 | | 0,1 | | 0,3 | 0,2 | 0,2 | 0,3 | 0,2 | 0,3 | 0,3 | 0,3 | | 0,2 | | 0,2 | 0,3 | 0,2 | 0,1 | 0,3 | 0,4 | 0,3 | 0,3 | 0,2 | 0,4 | 0,3 | 0,3 | 0,2 |

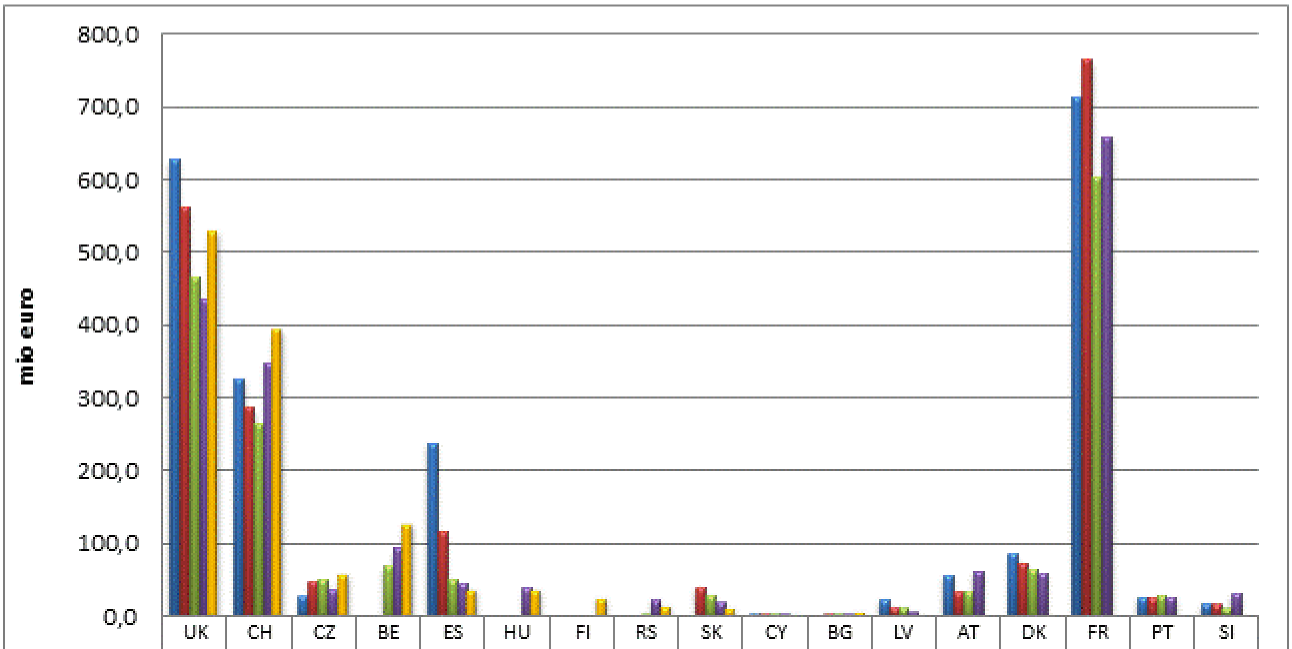
*Source: NRAs. Population data from Eurostat.*

*Note: SE includes number of rural delivery routes; SK includes data about delivery operatives who collect items; DE figures are estimates; USP only: AT, BE, CZ, DK, FI, FR, IE, IT, LT, NL, NO, SE, UK. CH data for 2012 includes express and courier providers, previous years do not. The data used to create this chart is available in Annex.*

## 14. Investment in the postal sector

In 2012, the value of investment in the postal sector among the countries that were able to provide this information was highest in the United Kingdom. In 2011, the value of investment was highest in Switzerland. Only 10 countries, out of 29 that have shared country data, have information available for investment in the postal sector for 2012.

**Figure 39 – Investment in the postal sector**




| | UK | CH | CZ | BE | ES | HU | FI | RS | SK | CY | BG | LV | AT | DK | FR | PT | SI |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2008 | 627,9 | 325,1 | 26,6 | | 238,0 | | | | | 0,3 | | 22,8 | 55,1 | 84,1 | 712,0 | 25,6 | 17,1 |
| 2009 | 561,2 | 285,4 | 47,0 | | 116,5 | | | | 39,4 | 0,3 | 0,5 | 11,3 | 31,7 | 72,5 | 764,0 | 24,8 | 15,5 |
| 2010 | 466,3 | 263,7 | 48,7 | 68,0 | 48,4 | | | 1,9 | 28,3 | 0,2 | 2,4 | 11,3 | 33,4 | 62,7 | 603,0 | 28,4 | 9,7 |
| 2011 | 434,4 | 348,0 | 35,1 | 93,0 | 44,5 | 37,8 | | 22,4 | 18,5 | 0,1 | 3,2 | 5,7 | 61,4 | 58,0 | 658,0 | 25,9 | 30,8 |
| 2012 | 529,1 | 395,3 | 59,9 | 127,0 | 36,8 | 36,6 | 26,8 | 16,0 | 11,5 | 0,1 | 5,8 | | | | | | |

Notes:

1. ONLY USP: UK, CH, CZ, HU
2. HU: Investment of both postal and non-postal services of the USP
3. Exchange rates used for currency conversions of the countries not using the Euro as national currency: Eurostat - Euro/ECU exchange rates - Annual data [ert_bil_eur_a] (http://epp.eurostat.ec.europa.eu/portal/page/portal/exchange_rates/data/database).
4. For countries not using the Euro as national currency, year on year variations in (Euro) value may result from variations of the exchange rate.

## 15. Annexes

### Data on employment, postal establishments, revenues and volumes

- Annex

### Data used concerning currencies (source: Eurostat)

| | National currency/euro | | | | | Euro/national currency | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| **CURRENCY/TIME** | **2008** | **2009** | **2010** | **2011** | **2012** | **2008** | **2009** | **2010** | **2011** | **2012** |
| Bulgarian lev | 1,956 | 1,956 | 1,956 | 1,956 | 1,956 | 0,511 | 0,511 | 0,511 | 0,511 | 0,511 |
| Czech koruna | 24,946 | 26,435 | 25,284 | 24,590 | 25,149 | 0,040 | 0,038 | 0,040 | 0,041 | 0,040 |
| Danish krone | 7,456 | 7,446 | 7,447 | 7,451 | 7,444 | 0,134 | 0,134 | 0,134 | 0,134 | 0,134 |
| Pound sterling | 0,796 | 0,891 | 0,858 | 0,868 | 0,811 | 1,256 | 1,122 | 1,166 | 1,152 | 1,233 |
| Hungarian forint | 251,510 | 280,330 | 275,480 | 279,370 | 289,250 | 0,004 | 0,004 | 0,004 | 0,004 | 0,003 |
| Lithuanian litas | 3,453 | 3,453 | 3,453 | 3,453 | 3,453 | 0,290 | 0,290 | 0,290 | 0,290 | 0,290 |
| Latvian lats | 0,703 | 0,706 | 0,709 | 0,706 | 0,697 | 1,423 | 1,417 | 1,411 | 1,416 | 1,434 |
| Polish zloty | 3,512 | 4,328 | 3,995 | 4,121 | 4,185 | 0,285 | 0,231 | 0,250 | 0,243 | 0,239 |
| Romanian leu | 3,683 | 4,240 | 4,212 | 4,239 | 4,459 | 0,272 | 0,236 | 0,237 | 0,236 | 0,224 |
| Swedish krona | 9,615 | 10,619 | 9,537 | 9,030 | 8,704 | 0,104 | 0,094 | 0,105 | 0,111 | 0,115 |
| Swiss franc | 1,587 | 1,510 | 1,380 | 1,233 | 1,205 | 0,630 | 0,662 | 0,724 | 0,811 | 0,830 |
| Icelandic krona | 143,830 | 172,670 | 161,890 | 161,420 | 160,73 | 0,007 | 0,006 | 0,006 | 0,006 | 0,006 |
| Norwegian krone | 8,224 | 8,728 | 8,004 | 7,793 | 7,4751 | 0,122 | 0,115 | 0,125 | 0,128 | 0,134 |
| Croatian kuna | 7,224 | 7,340 | 7,289 | 7,439 | 7,522 | 0,138 | 0,136 | 0,137 | 0,134 | 0,133 |
| Denar (of the former Yugoslav Republic of Macedonia) | 61,520 | 61,282 | 61,519 | 61,480 | 61,524 | 0,016 | 0,016 | 0,016 | 0,016 | 0,016 |