ERGP (12) 33 – ERGP report on data collection

ERGP REPORT WITH DATA ON INDICATORS ON THE POSTAL MARKET

April 2013

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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	
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		

Executive Summary

According to the Postal Directive, full market opening shall be accomplished by 31 December 2012 for the 27 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 service.

ERGP prepared a report on indicators for postal market, identifying core indicators to monitor market developments [ERGP (12) 32].

The table below summarizes the core indicators suggested in that 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

Simultaneously, a questionnaire was issued to collect data on some of those indicators, at national level, in the European countries. This report provides a compilation of the results of the data collection implemented.

It is important to note that countries face specific situations.

Any analysis of the results should take into consideration the existence of disparities between countries.

Overall, the collected data show a general decline of the postal market except for some submarkets such as parcels and registered mail which are nevertheless growing. The express segment is also expanding.

In spite of this overall declining tendency, the number of postal outlets appears steady. With respect of the employment of the postal sector, the number of persons employed is decreasing.

Part 1 – Background and objectives

ERGP's work programme 2012[1] included the elaboration of a report on the methodology and indicators (including looking at starting points in order to determine the "base-line" or default situation) to measure market developments after full market opening with a view of benchmarking effectiveness of regulation to promote competition. The work should include data, if possible.

ERGP prepared a report on indicators for postal market (ERGP (12) 32), with an identification of core indicators, mainly in the perspective of NRAs needs, to monitor market developments.

This report provides a compilation of the results of the data collection implemented in 2012, and is recommended to be read in connection with that report.

Part 2 – Methodology and considerations regarding comparability of data

A questionnaire was issued in June 2012 to collect data on specific indicators on the postal sector.

NRAs' from 31 countries (out of 33) provided feedback: Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, Former Yugoslav Republic of Macedonia, France, Germany, Greece, Hungary, Ireland, 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 questionnaire. In some situations data collected in 2011 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.

It is also important to note that every country face specific situations. For example, not all the 33 countries have already implemented full market opening. For the 27 Member States of the European Union, this shall be accomplished until 31 December 2012.

These results should also be read in conjunction with the above referred ERGP report on indicators for postal market, which contains information on differences in the scope of postal services and universal postal services between countries, on the legal powers of NRAs to collect data from postal service providers and on the legal licensing system for postal service providers.

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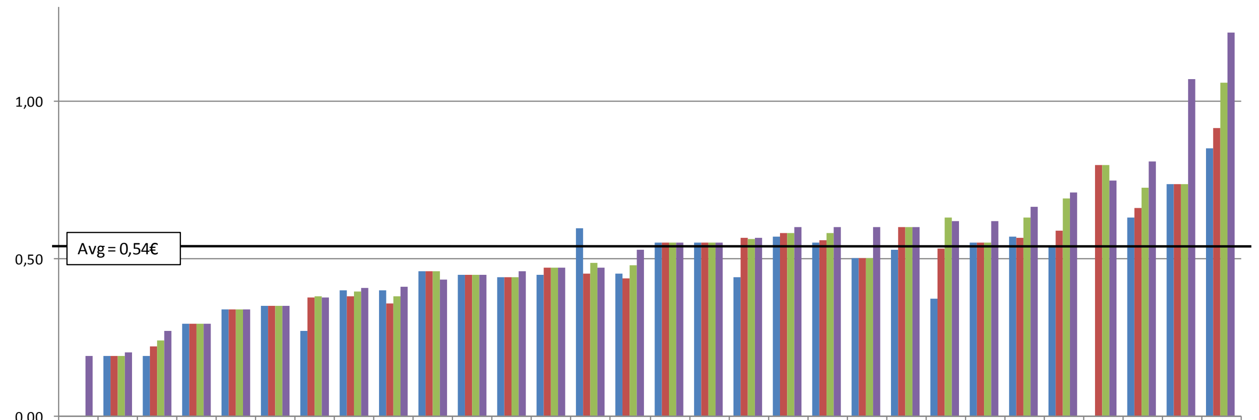
[1] Ref. ERGP (11) 23 – ERGP WORK PROGRAMME 2012. Available at http://ec.europa.eu/internal_market/ergp/docs/documentation/ergp-11-23-final-work-programme_en.pdf.

Part 3 – Compilation of data on specific indicators

1- Market outcomes indicators

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

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



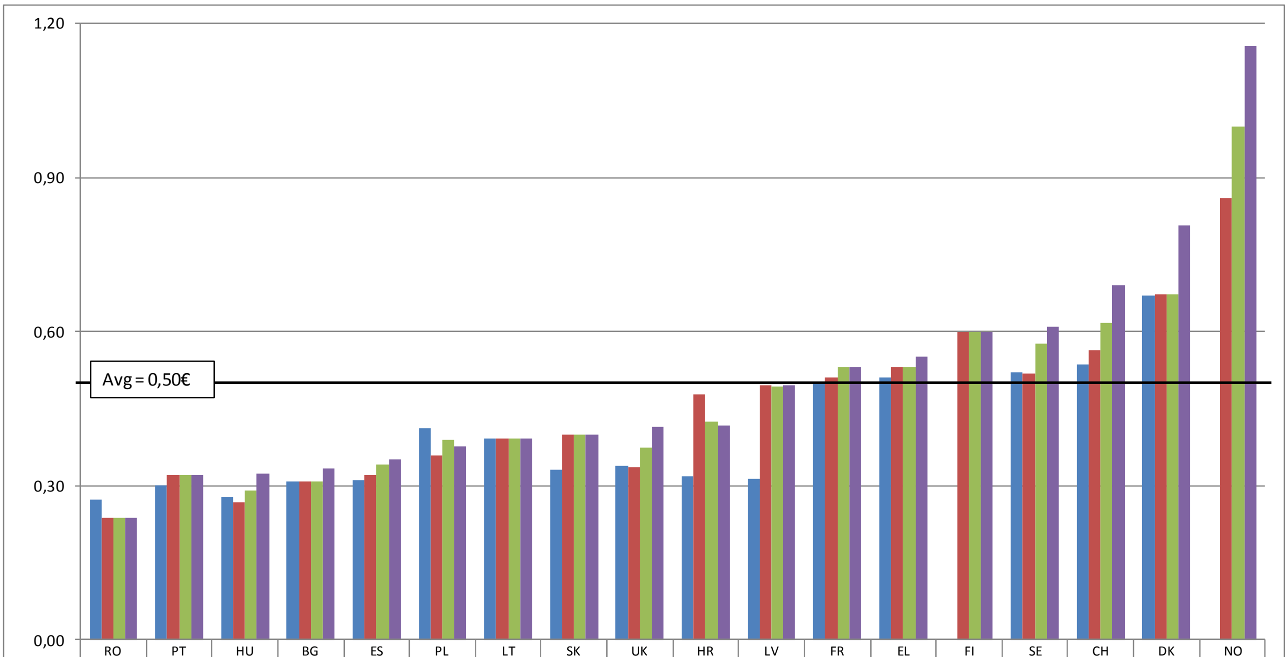
	RS	MT	SI	FY	CY	EE	RO	CZ	HU	BG	LT	NL	PT	PL	UK	DE	IE	LV	EL	FR	LU	SK	HR	AT	SE	BE	FI	CH	DK	NO
2008		0,19	0,19	0,29	0,34	0,35	0,27	0,40	0,40	0,46	0,45	0,44	0,45	0,60	0,45	0,55	0,55	0,44	0,57	0,55	0,50	0,53	0,37	0,55	0,57	0,54		0,63	0,74	0,85
2009		0,19	0,22	0,29	0,34	0,35	0,38	0,38	0,36	0,46	0,45	0,44	0,47	0,45	0,44	0,55	0,55	0,57	0,58	0,56	0,50	0,60	0,53	0,55	0,57	0,59	0,80	0,66	0,74	0,92
2010		0,19	0,24	0,29	0,34	0,35	0,38	0,40	0,38	0,46	0,45	0,44	0,47	0,49	0,48	0,55	0,55	0,56	0,58	0,58	0,50	0,60	0,63	0,55	0,63	0,69	0,80	0,72	0,74	1,06
2011	0,19	0,20	0,27	0,29	0,34	0,35	0,38	0,41	0,41	0,43	0,45	0,46	0,47	0,47	0,53	0,55	0,55	0,57	0,60	0,60	0,60	0,60	0,62	0,62	0,66	0,71	0,75	0,81	1,07	1,22

Notes:
Avg – Average in 2011.
*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.
Prices in Euro, at 1 July of each year.
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).
For countries not using the Euro as national currency, variations in (Euro) price may result from variations of the exchange rate.
SI: VAT applied.
BE, DK, FI, LT, PL: Prices for letters up to 50g.
Not applicable: ES.

Prices of domestic first class standard category weighing up to 20g increased between 2008 and 2011 in 18 countries. Expressed in Euro prices (Figure 1), that increase is visible for 21 countries. These additional 3 cases are explained by the variations in the exchange rates for currency conversions into Euro, affecting the prices in Switzerland, Czech Republic and the Former Yugoslav Republic of Macedonia. In the same period prices decreased in Bulgaria, Finland and

Poland. In 2011, the average price was € 0,54, representing an increase of approximately 8% between 2009 and 2011.

Figure 2 – Price of domestic (second class)* letter weighing less than 20gr (in Euro)



	RO	PT	HU	BG	ES	PL	LT	SK	UK	HR	LV	FR	EL	FI	SE	CH	DK	NO
2008	0,27	0,30	0,28	0,31	0,31	0,41	0,39	0,33	0,34	0,32	0,31	0,50	0,51		0,52	0,54	0,67	
2009	0,24	0,32	0,27	0,31	0,32	0,36	0,39	0,40	0,34	0,48	0,50	0,51	0,53	0,60	0,52	0,56	0,67	0,86
2010	0,24	0,32	0,29	0,31	0,34	0,39	0,39	0,40	0,37	0,43	0,49	0,53	0,53	0,60	0,58	0,62	0,67	1,00
2011	0,24	0,32	0,32	0,33	0,35	0,38	0,39	0,40	0,41	0,42	0,50	0,53	0,55	0,60	0,61	0,69	0,81	1,15

Notes:
Avg – Average in 2011.
*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.
Prices in Euro, at 1 July of each year.
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).
For countries not using the Euro as national currency, variations in (Euro) price may result from variations of the exchange rate.
DK, BG (2011), FI, LT, PL: Prices for letters up to 50gr.
Not applicable: AT, CY, DE, EE, IE, LU, MT, NL, SI.

According to Figure 2, in 14 of the countries having a second class standard category of mail, prices for items weighing up to 20g, expressed in Euro, went up between 2008 and 2011. However, in the case of Switzerland the increase is only due to variations in the exchange rate of currency conversion into Euro, since the prices remained stable.

The decrease shown in Romania and Poland between 2008 and 2011 is also explained by the variations in the exchange rates of currency conversion into Euro, since the prices remained stable in Romania and in Poland there was an increase in the price in 2009, remaining stable since then.

In 2011, the average price for those countries having second class standard mail was € 0,50, a rise of 10% between 2009 and 2011.

2- Market structure indicators

Indicators on market structure aim to give information on features of the market which produce the retail market outcomes.

Number of active postal service providers

Comparing data between 2008 and 2011, about half of NRAs reported an increase in the number of active postal service providers in their countries whilst six NRAs reported a decrease.

Table 2 – Total number of active postal service providers

Country	2008	2009	2010	2011	Notes
AT			11	13	a)
BE	649	612	609		a)
BG	4	4	6	6	
CH	51	50	51	51	d)
CY	19	19	17	20	
CZ	1	1	1	1	b)
DE	45.000	41.000	47.000	47.000	a), e)
DK			1	5	a)
EE	23	22	25	21	
EL	415	467	502	501	
ES				1363	f)
FI				310	
FR	22	23	22	25	
FY	7	21	23	18	
HR	14	19	21	23	
HU	178	237	265	268	
IE	37	35	30	27	c)
LT	60	60	55	55	
LV	39	36	35	37	
MT	17	17	19	19	
NL			83	135	a)
NO	23	21	24	25	
PL	106	125	152	155	
PT	64	61	58	63	
RO	711	742	274	214	
RS			34	41	
SE	35	29	32	30	a)
SI	12	12	11	16	
SK	19	19	20	20	

a) Data for the number of postal service providers, irrespective of being active.
b) The answers from CZ concern the USP.
c) Active Postal Service Providers who were authorised.
d) Only providers of services within the universal service.
e) The extremely high number of active postal service providers in Germany is largely due to the non-licensed service providers (such as parcel delivery) that only need to register with BNetzA. The total number of active licensees in the letter-post service stood around 600 in 2011.
f) The law changed in Spain in 2011, being now mandatory to renew the authorization in the Postal Registry.

Indicators on the level of market concentration

The indicators analysed (see below) show that the postal sector (as a whole) is highly concentrated, but with a tendency to become less concentrated.

Table 3 – Indicator CR4 on the level of market concentration*

	CR4 – based on Volumes					CR4 – based on Revenues				
	2008	2009	2010	2011	Tendency	2008	2009	2010	2011	Tendency
BE						92,0	88,6	86,0		Decrease
HR	99,2	98,9	98,6	98,5	Decrease	90,2	90,4	90,9	91,0	Increase
CZ	100,0	100,0	100,0	100,0	Stable	100,0	100,0	100,0	100,0	Stable
EE	98,9	99,5	99,1	99,2	Increase	88,2	87,6	81,7	83,5	Decrease
FR	>99,0	>99,0	>99,0	>99,0	Stable	>99,0	>99,0	>99,0	>99,0	Stable
EL	96,9	96,7	96,6	95,3	Decrease	80,9	81,6	81,6	80,3	Decrease
HU	99,3	99,1	99,1	98,6	Decrease	85,6	83,8	85,4	84,1	Decrease
LV	96,0	92,5	88,7	88,5	Decrease	90,8	90,7	86,4	86,3	Decrease
LT	92,0	91,0	89,2	86,6	Decrease					
MT	100,0	99,8	99,7	99,7	Decrease	100,0	84,5	84,7	85,1	Decrease
NL	99,0	99,0	99,0	99,0	Stable	99,0	99,0	99,0	99,0	Stable
NO	78,0	78,0	78,0	78,0	Stable	86,0	85,0	85,0	90,0	Increase
PL	98,6	98,2	98,3	98,1	Decrease	95,2	93,6	92,4	91,1	Decrease
PT	99,5	99,4	99,0	98,8	Decrease	91,8	91,3	89,6	89,1	Decrease
RO		95,2	89,7	89,0	Decrease					
RS			99,6	99,6	Stable			94,2	90,1	Decrease
SK	94,4	97,7	95,8	92,5	Decrease	82,8	90,7	85,0	82,1	Decrease
SI	4 largest providers cover almost 100 % of the market.									
SE	99,7	99,7	99,4	99,8	Increase				99,3	
UK	100,0	100,0	100,0	100,0	Stable					

* CR4 is the sum of the market shares of the largest providers in the market. The higher the value of CR, the higher is the level of concentration of the market.

Table 4 – Herfindahl-Hirschman Index (HHI) on the level of market concentration

	HHI – based on Volumes					HHI – based on Revenues				
	2008	2009	2010	2011	Tendency	2008	2009	2010	2011	Tendency
HR	8.119	6.290	6.100	5.523	Decrease	5.241	5.504	5.426	5.324	Increase
CZ	10.000	10.000	10.000	10.000	Stable	10.000	10.000	10.000	10.000	Stable
EE	6.200	6.160	5.670	5.650	Decrease	4.580	4.520	3.550	3.510	Decrease
FR	9.785	9.780	9.800	9789	Stable	9.821	9.796	9.814	9821	Stable
EL	8.571	8.512	8.428	8.105	Decrease	3.790	3.858	3.723	3.580	Decrease
HU	9.660	9.631	9.398	9.429	Decrease	5.548	5.542	5.363	5.109	Decrease
LV	8.895	8.174	7.423	7.351	Decrease	5.053	5.944	4.439	4.371	Decrease
LT	4.865	4.854	4.444	4.096	Decrease					
MT	9.949	9.676	9.735	9.726	Decrease	9.840	4.359	4.275	4.292	Decrease
NL	7.497	7.477	6.999	6770	Decrease	8.490	8.499	8.311	8151	Decrease
PL	9.200	8.700	8.100	7.700	Decrease	6.900	6.700	6.300	5.900	Decrease
PT	9.689	9.603	9.499	9.429	Decrease	5.900	5.919	5.561	5.337	Decrease
RS			9.535	9.478	Decrease			5.229	4.904	Decrease
SK	8.527	8.866	8.150	7.233	Decrease	4.974	5.436	5.748	3.821	Decrease
SE	8.000	7.900	7.900	7.800	Decrease				8.700	
UK	9.976	9.948	9.988	9.990	Increase				9.969	

* 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.

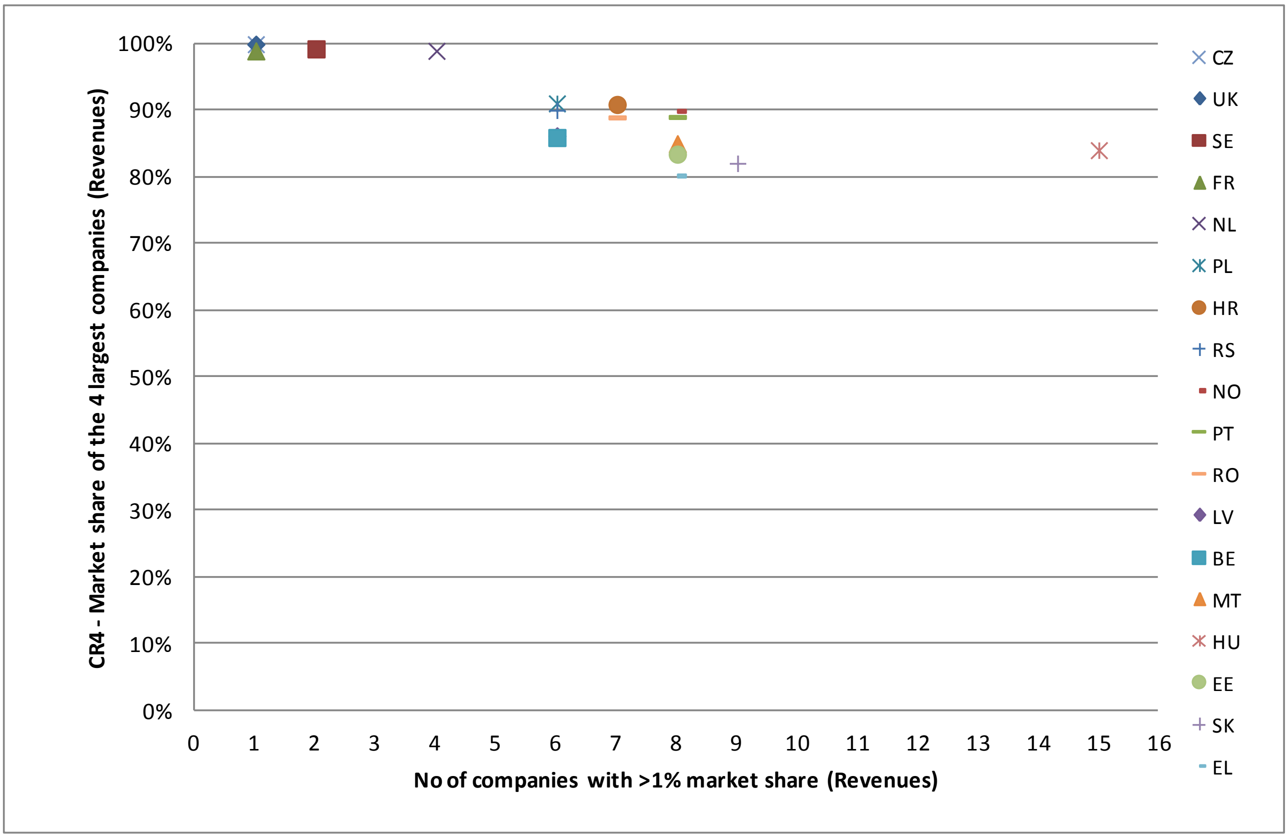
Note: FR – data only considers items of correspondence (domestic and international outbound).

Table 5 – Number of postal service providers with more than 1% of the total postal market

	>1% - Based on volumes					>1% - Based on revenues				
	2008	2009	2010	2011	Tendency	2008	2009	2010	2011	Tendency
BE						5	6	6	5	Stable
BG	19	18	18	15	Decrease	19	18	18	15	Decrease
HR	2	3	3	3	Stable	7	7	7	7	Stable
CY	1	1	1	1	Stable	1	1	1	1	Stable
CZ	1	1	1	1	Stable	1	1	1	1	Stable
EE	2	2	2	3	Increase	6	6	8	8	Increase
ES	2	2	2	2	Stable	2	2	2	2	Stable
FR	1	1	1	1	Stable	1	1	1	1	Stable
EL	9	9	8	5	Decrease	8	8	8	8	Stable
HU	1	1	1	1	Stable	6	5	8	15	Increase
IE	1	1	1	1	Stable	1	1	1	1	Stable
LV				7					6	
LT	6	7	9	9	Increase	11	12	12	12	Stable
MT	1	2	1	1	Stable	1	10	9	8	Decrease
NL	4	4	4	4	Stable	4	4	4	4	Stable
NO						9	10	10	8	Decrease
PL	2	2	2	4	Increase	5	6	6	6	Stable
PT	1	1	1	1	Stable	7	7	8	8	Increase
RO	19	11	9	7	Decrease					
RS			1	1	Stable			6	6	Stable
SK	3	3	4	8	Increase	8	8	9	9	Increase
SE	2	2	2	2	Stable	2	2	2	2	Stable
UK	1	1	1	1	Stable					

Note: ES – data excluding the express segment.

Figure 3 – Plot of market share of the 4 largest providers vs number of providers with more than 1% market share (by revenues in year 2011)



Note: BE (year 2010).

3- Volumes

Introductory notes

As already mentioned in the beginning of this report, the differences across countries are reflected in the data collected and on the results disclosed in this report, and as such all results disclosed in this report have to be read carefully and any analysis of them have to take into consideration the existence of disparities between countries.

As an example, in what concerns volumes (traffic), the following table shows an analysis of the availability of data for publication by ERGP taking into consideration the results of the questionnaires issued by ERGP in the year 2012.

Table 6 – Availability of data for publication by ERGP (analysis based in the data received for 2011)[2]

Total postal traffic (1)	AT (incumbent only and including unadressed mail),BG, CY, CZ (incumbent in the US only), DE (including unadressed mail), DK, EL (US only), FR, HR, HU, IE (confidential), MT, NO, PL, PT, SE (US only and no parcels), UK, SK
Domestic items	BG, CH (US only), CY, CZ(incumbent in the US only), EE, EL (US only), FR, HR, HU, IE (confidential), LT, LV, MT, NO, PL (confidential) PT, RO (single piece only), SE(US only and no parcels), SI, SK, UK (confidential)
International Outbound	BG, CZ(incumbent in the US only), CY, EE, EL(incumbent in the US only), FI, FR, HR, IE (confidential), LT, LV, MT, NO, PL (confidential), PT, RO (single piece only), SE (confidential), SI, SK, UK (confidential)
International Inbound (2)	BG, CZ(incumbent in the US only), CY, EE, EL (Providers with General Authorization only), FI, FR, HR, HU, IE (confidential), LT, LV, MT, NO, PL (confidential), PT, RO (single piece only), SE (confidential), SI, SK, UK (confidential)
Percentage of reserved total traffic	AT, BE (confidential), BG, CH, CZ, DE, DK, EE, EL (USP only), ES, FI, FR, HR, HU, IE (confidential), LT, LV, MT (within US), PL, PT, RO, SE, SI, SK, UK

[2] Countries are listed in alphabetical order. Information between brackets only applies to the sole country listed before the brackets. For instance, in the first line, the information "incumbent only and including unaddressed mail" only applies to AT or the information "US only" only applies to EL.

Data on DOMESTIC POSTAL TRAFFIC

Total Letter-post items (1)	AT (incumbent only), BG, CH (US only), CY, CZ (incumbent in the US only), DE (including unadressed mail), EE, EL (US only), FI, FR, HR, HU, IE (confidential), LT, LV, MT, PL (confidential), RO (single piece only), NO (includes unadressed mail), PT, RO (single piece only), SE (US only), SI, SK, UK (confidential)
Total items of Correspondence	AT (incumbent only), BG, CY, CZ, DE, EL, FI, FR, HR, HU, IE (confidential), LT, LV, MT, PL (confidential), PT, RO (single piece only), SE, SI, SK (confidential), UK (confidential)
Correspondence items (excluding Direct Mail)	AT (incumbent only), BG, CY, CZ (incumbent in the US only), EE, EL (incumbent in the US only), FI (estimates), FR, HR, HU, IE (confidential) LT, LV, PL (confidential) PT (estimates), RO (single piece only), SK (confidential)
Direct Mail	AT, BG, CY, CZ (incumbent in the US only), EE, EL, FI (estimates), FR, HR, HU, IE (confidential), LT, LV, PL (confidential), PT (US only), RO (single piece only), SI, SK (confidential)
Total items of Correspondence	
of which single-piece items	BG, CZ, EL (incumbent in the US only), FI (estimates), FR, IE (confidential), MT, SK (confidential), RO
of whichbulk mails	CZ, EL(incumbent in the US only), FI (estimates), FR, IE (confidential), SK (confidential), MT
Total (non-express) registered items (1)	AT, BG, CY, CZ (incumbent in the US only), EE, EL(incumbent in the US only), (estimates), FR, FR, HR, HU, LT, LV, PT (USP only), SI
Total postal parcels	AT (incumbent only), BG, CH (US only), CY, CZ (incumbent in the US only), DE (including unadressed mail), EL(incumbent in the US only), FI, FR, HR, HU, IE (confidential), LT, LV, MT, NO, PL (confidential) PT, RO (single piece only), SI, SK
of which non-express parcels	CZ (incumbent in the US only), EL (incumbent in the US only), FR, LV, MT, PL (confidential), PT, RO (single piece only), SK
of which express parcels	CZ (incumbent in the US only), EL (incumbent in the US only), EE, FR, LV, MT, PL (confidential) PT, RO (single piece only), SK
of which (non-express) registered parcels	CZ (incumbent in the US only), EL (incumbent in the US only), EE, FR,, HU (incumbent in the US only), LV, SK
Total press items (1)	BG, CH, CZ (incumbent in the US only), DE (estimates), EE, EL (Providers with General Authorisation only), FI, FR, HR, HU, LV, NO, PT (estimates), SI, SK (confidential)
Total courier and express items (correspondence, parcels, etc)	BG, CZ (incumbent in the US only),, EE, EL (Providers with General Authorisation only), FR, HR, HU, IE (confidential), LT, LV, MT, PL (confidential) PT, SK, SI

Data on INTERNATIONAL OUTBOUND TRAFFIC

Total Letter-post items (1)	BG, CY, CZ (incumbent in the US only), DE, EE, EL (incumbent in the US only), FI, FR, HR, HU, IE (confidential),LT, LV, MT, PL (confidential), PT, RO, SE (confidential), SI, SK (confidential)
Items of Correspondence	BG, CY, CZ (incumbent in the US only), EL (incumbent in the US only), FI, FR, HR, HU, IE (confidential),LT, LV, MT, PL (confidential), PT, RO,SK (confidential)
Correspondence items (excluding Direct Mail)	CY, CZ (incumbent in the US only), EE, EL (incumbent in the US only), FR, HR, HU, IE (confidential),LT, LV, PL (confidential) PT, RO, SK(confidential)
Direct Mail	CY, CZ (incumbent in the US only), EE, EL (incumbent in the US only), FR, HR, LT, LV, PL (confidential), PT (US only), RO
Press	CZ(incumbent in the US only), EL (incumbent in the US only), EE, FR, HR, LV, PT (estimates)
Parcels (non-express)	CY, CZ(incumbent in the US only), EE, EL (incumbent in the US only), FR HR, HU(incumbent in the US only), LT, LV, PT, RO, SI
Courier and express mail	BG, CY, CZ (incumbent in the US only), EE, EL (Providers with General Authorisation only), HR, HU, IE (confidential) LV, PL (confidential), PT, SI, SK (confidential),

As a consequence of the differences among members for what concerns data availability, it was decided to restrain the scope of the questionnaire in 2012 to the items for which it was sought a substantial number of regulators would be able to provide data and to the items that appear to be essential for an appropriate understanding of the postal market. On those topics, ERGP expects that NRAs may improve the ability to collect information in the coming years.

The data collection in 2012 was confined to the following items:

- For volumes:
    - Total postal traffic (domestic items, international outbound, international inbound);
    - Percentage of reserved total traffic vis-à-vis postal traffic;
    - Total postal items per capita;
    - Total items of correspondence (distinguishing small packets, single piece items and bulk mail items, direct mail and registered items);
    - Total domestic postal parcels;

  - International outbound items of correspondence;
  - International outbound non express parcels;
  - Total express items;
  - Outbound express;
- For revenues:
  - Total postal revenues, excluding express (domestic items, international outbound, international inbound);
  - Total postal revenues, only express (domestic items, international outbound, international inbound);
  - Percentage of reserved total revenues vis-à-vis postal revenues;
  - Total postal revenues as % of the GDP.

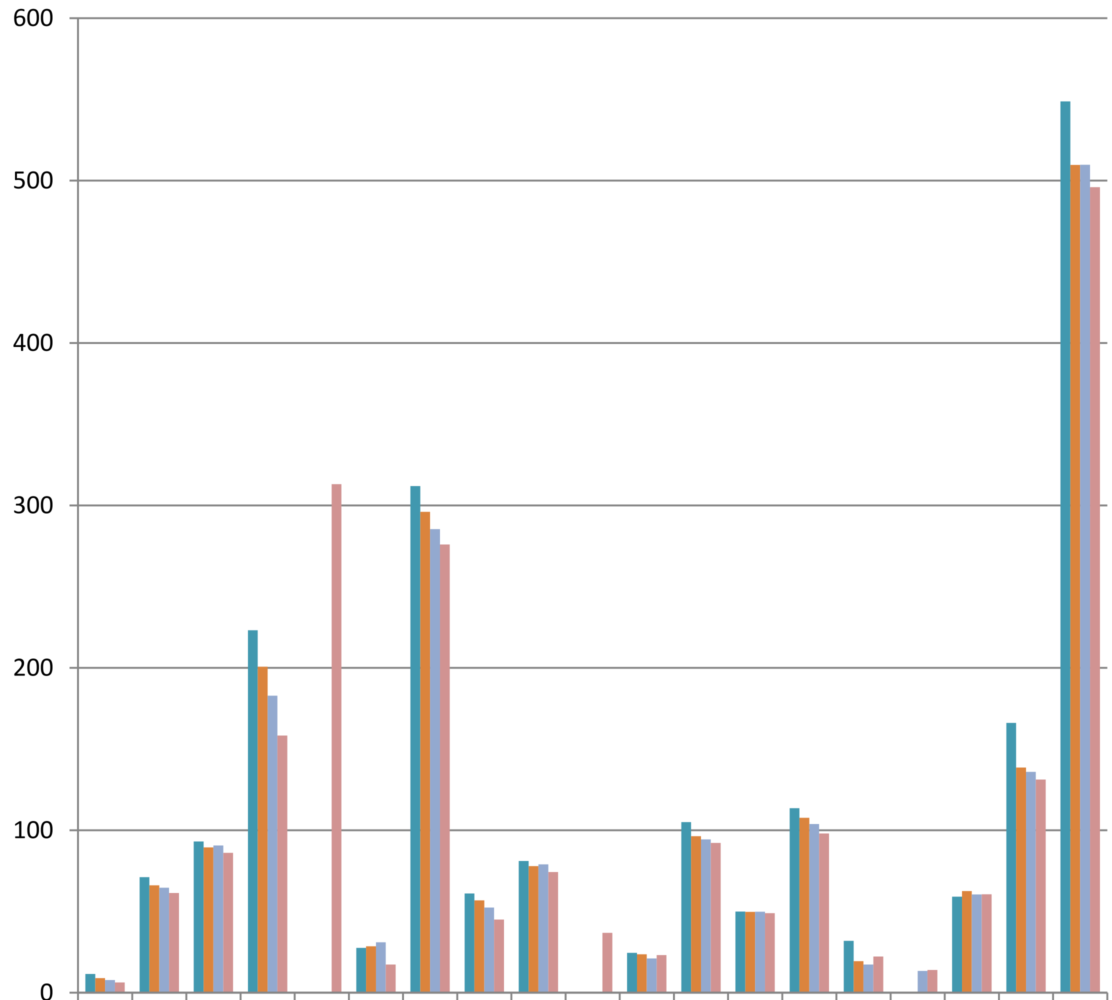
Henceforth, ERGP is not publishing aggregated figures to give an overall picture of the European postal market as a whole since the data that is collected is not always quite comparable (some refer to the whole market, some refer to some parts of the market, some refer only to the incumbent/USP…). Data published by ERGP will then only be disaggregated information per product and per country.

In order to take into account differences between countries in terms of population, the indicators on volumes (traffic) and on revenues, presented in this report, are as much as possible converted to “per capita”, using data for population per year published by Eurostat[3].

[3] Source: http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=demo_gind&lang=en.

Compilation of data collected through the 2012 questionnaire:

Figure 4 – Total postal traffic per capita (excluding express)*



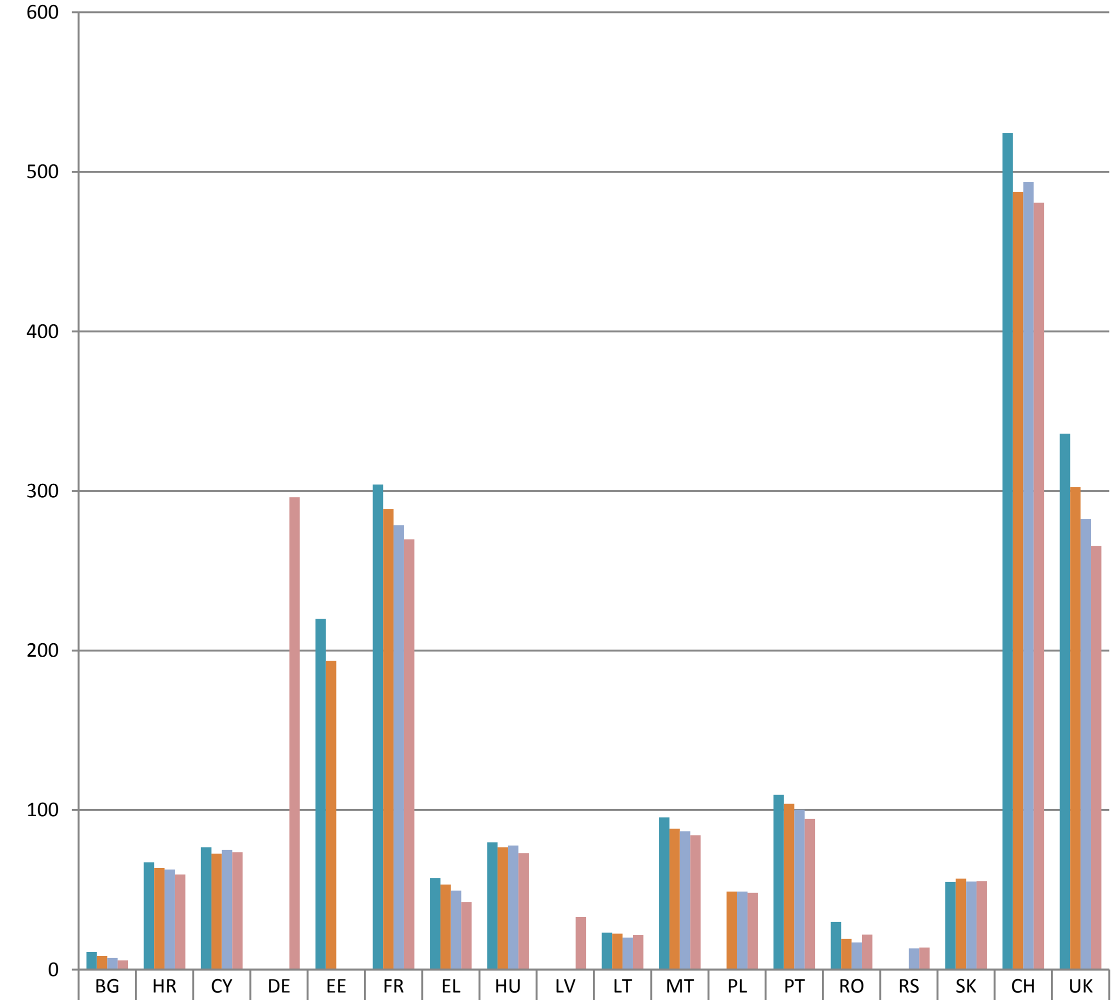
	BG	HR	CY	DK	DE	FY	FR	EL	HU	LV	LT	MT	PL	PT	RO	RS	SK	SI	CH
2008	12	71	93	223		28	312	61	81		25	105	50	114	32		59	166	549
2009	9	66	89	201		29	296	57	78		24	96	50	108	19		63	139	510
2010	8	65	91	183		31	285	52	79		21	94	50	104	17	13	60	136	510
2011	6	61	86	158	313	17	276	45	74	37	23	92	49	98	22	14	61	131	496

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

2008	2009	2010
~ 517	~ 507	~ 523

Confidential: CZ, IE
Not available: AT, BE, EE, FI, LU, NL, NO, SE, UK.
US only: MT
USP only: HU, RS
Single piece only: BG, LT, LV.

Figure 5 –Domestic items per capita (excluding express)



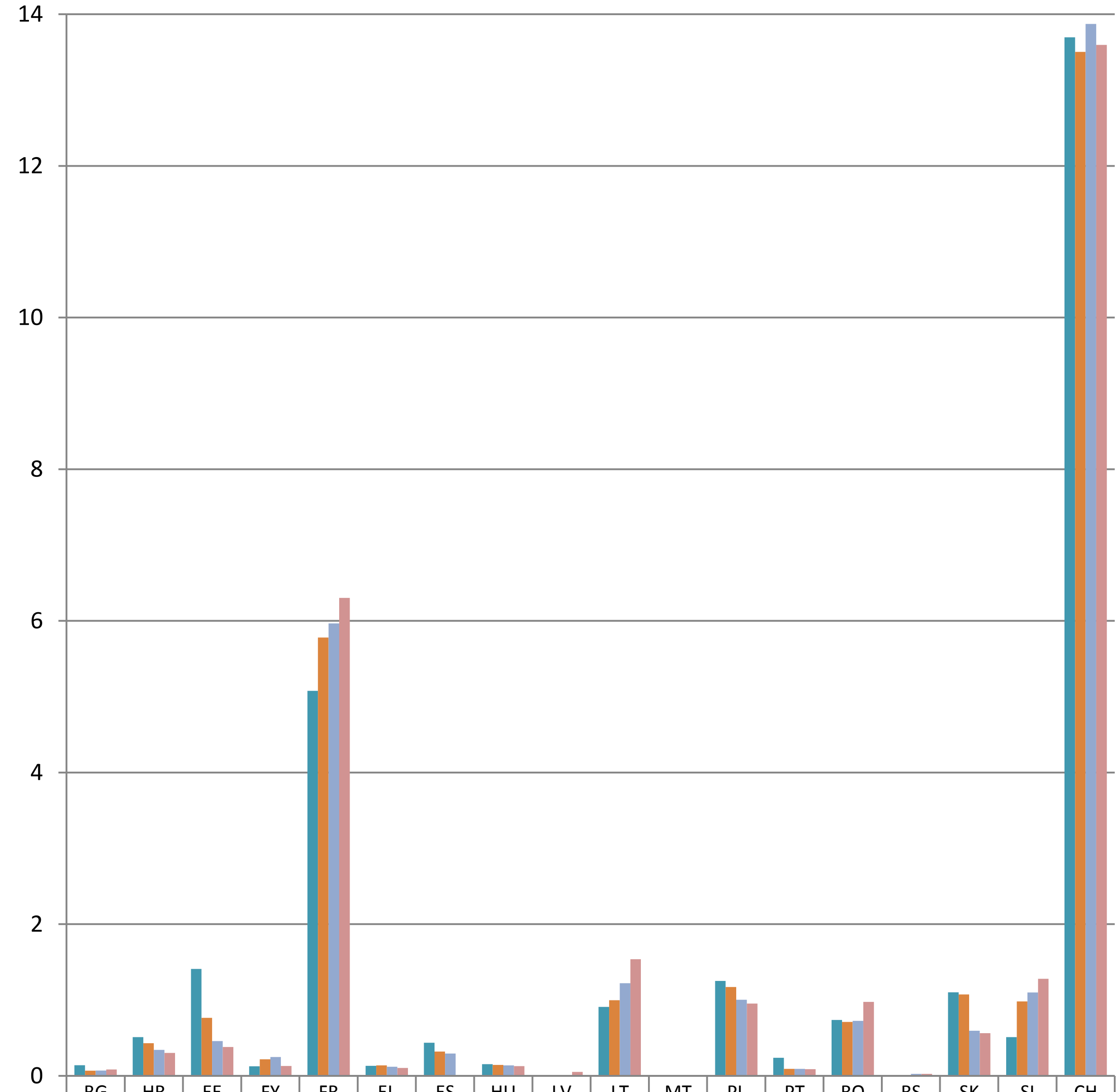
	BG	HR	CY	DE	EE	FR	EL	HU	LV	LT	MT	PL	PT	RO	RS	SK	CH	UK
2008	11	67	77		220	304	57	80		23	95		110	30		55	524	336
2009	9	64	73		194	289	53	77		23	88	49	104	19		57	487	302
2010	7	63	75			278	50	78		20	87	49	100	17	13	55	494	282
2011	6	60	74	296		270	42	73	33	22	84	48	94	22	14	55	481	266

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

	2008	2009	2010	2011
DE	512	501	517	
NO	780	693	706	696

Confidential: CZ, DK, IE
Not available: AT, BE, EE (2010 & 2011), ES, FI, FY, LU, NL, SE, SI
US only: EL, MT
USP only: CH, CZ, ES, HU, RS
Single piece only: BG, LT, LV

Figure 6 – Domestic Postal parcels per capita (excluding express)



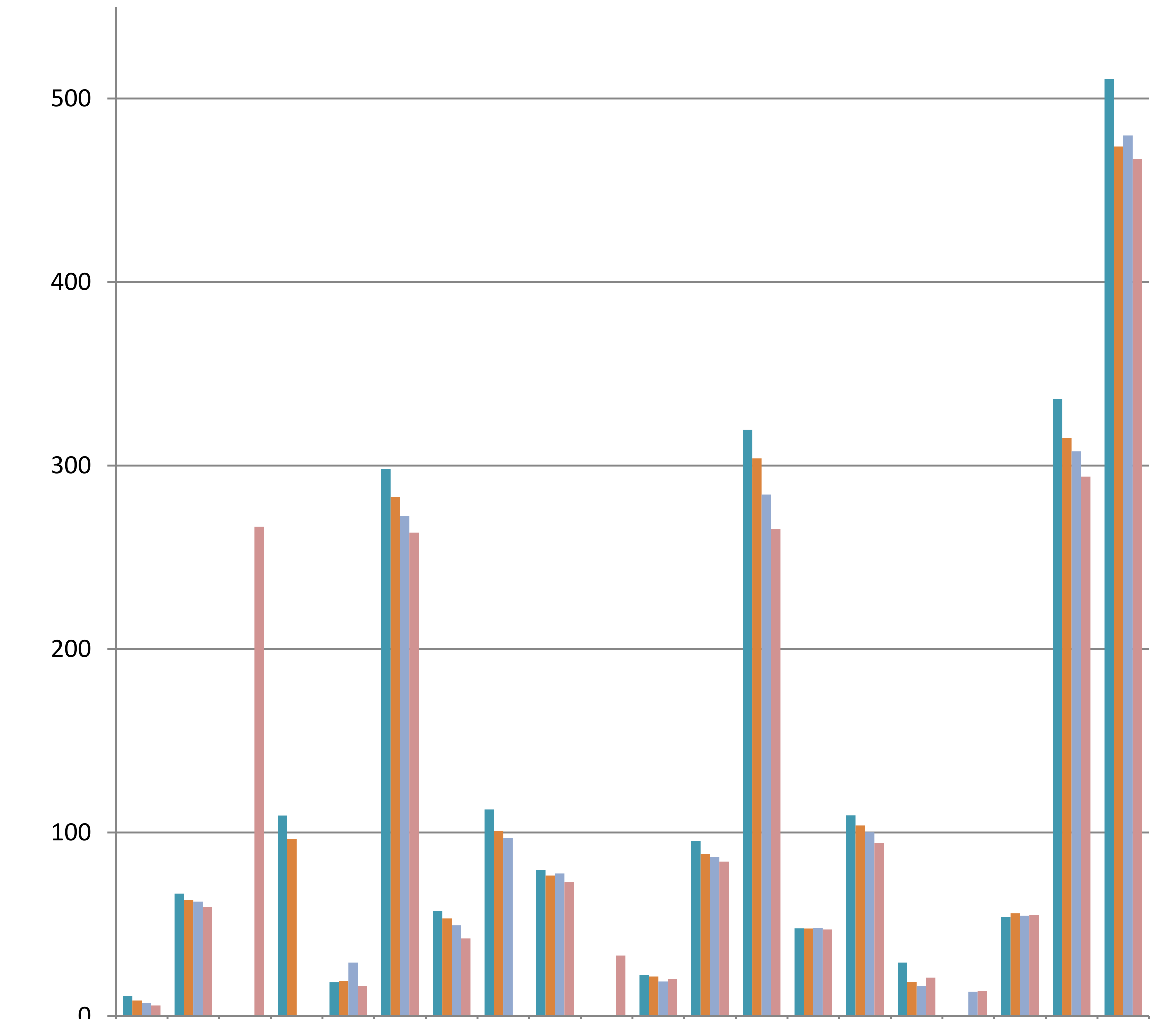
	BG	HR	EE	FY	FR	EL	ES	HU	LV	LT	MT	PL	PT	RO	RS	SK	SI	CH
2008	0,140	0,510	1,409	0,127	5,078	0,133	0,436	0,153		0,909	0,001	1,252	0,239	0,738		1,101	0,512	13,69
2009	0,068	0,431	0,766	0,218	5,781	0,139	0,320	0,144		0,997	0,002	1,172	0,093	0,711		1,073	0,982	13,50
2010	0,070	0,343	0,458	0,248	5,967	0,120	0,295	0,138		1,222	0,002	1,004	0,091	0,724	0,026	0,595	1,099	13,87
2011	0,085	0,302	0,381	0,131	6,303	0,104		0,128	0,053	1,538	0,002	0,954	0,089	0,975	0,026	0,563	1,280	13,59

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

	2008	2009	2010	2011
DE	23	23	24	29,6
NO	7,7	7,1	7,4	7,8

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

Figure 7 –Domestic letter post items per capita (excluding express)*



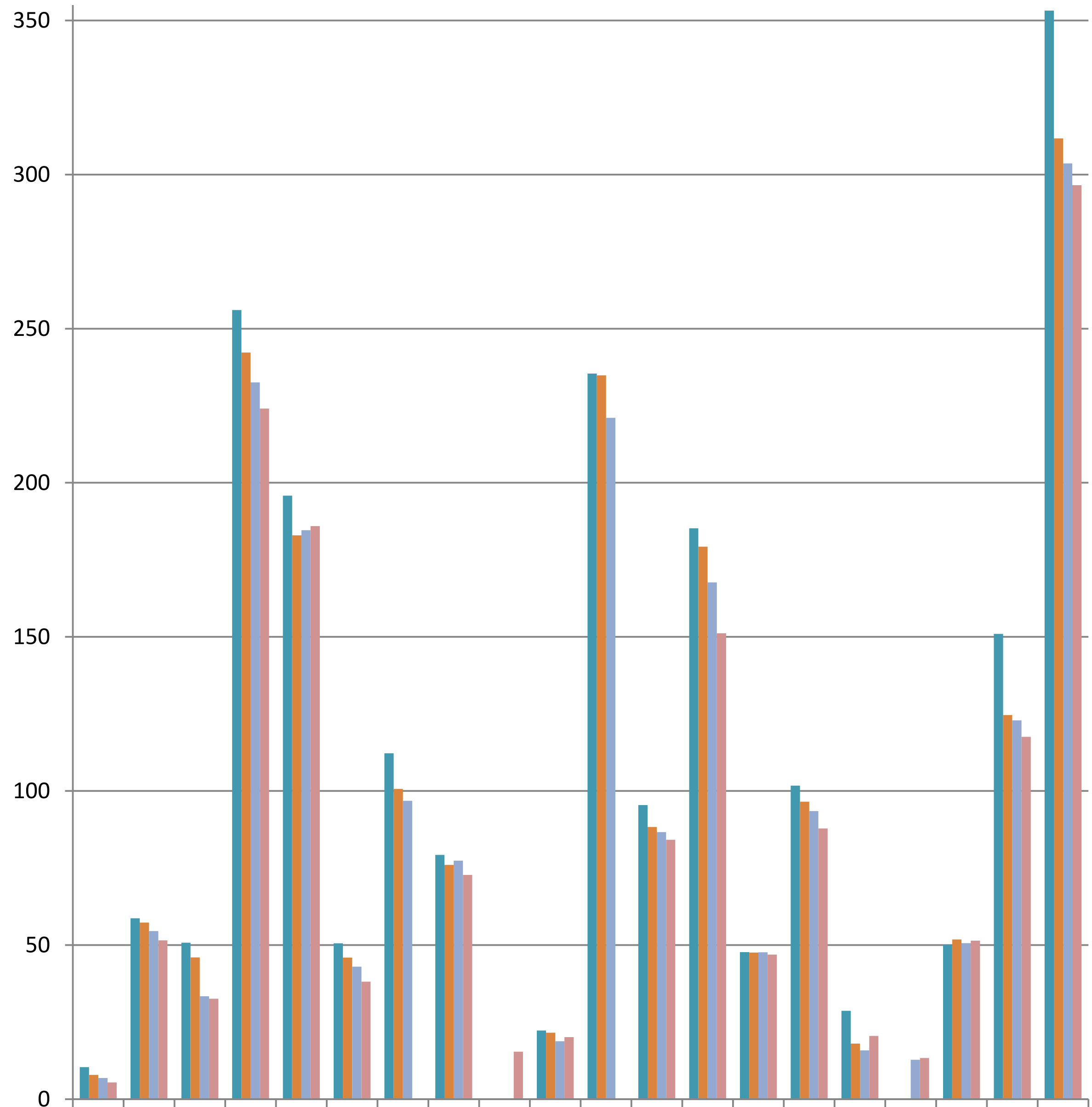
	BG	HR	DE	EE	FY	FR	EL	ES	HU	LV	LT	MT	NL	PL	PT	RO	RS	SK	SE	CH
2008	11	67		109	18	298	57	113	80		22	95	319	48	109	29		54	336	511
2009	8	63		96	19	283	53	101	77		22	88	304	48	104	19		56	315	474
2010	7	62			29	273	49	97	78		19	87	284	48	100	16	13	55	308	480
2011	6	59	267		16	263	42		73	33	20	84	265	47	94	21	14	55	294	467

* 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, IE
Not available: AT, BE, CY, EE (2010 & 2011), FI, LU, NO, SI, UK
US only :EL, MT
USP only :CH, ES, HU, RS
Single piece only : BG,LT, LV
NL : four largest operators

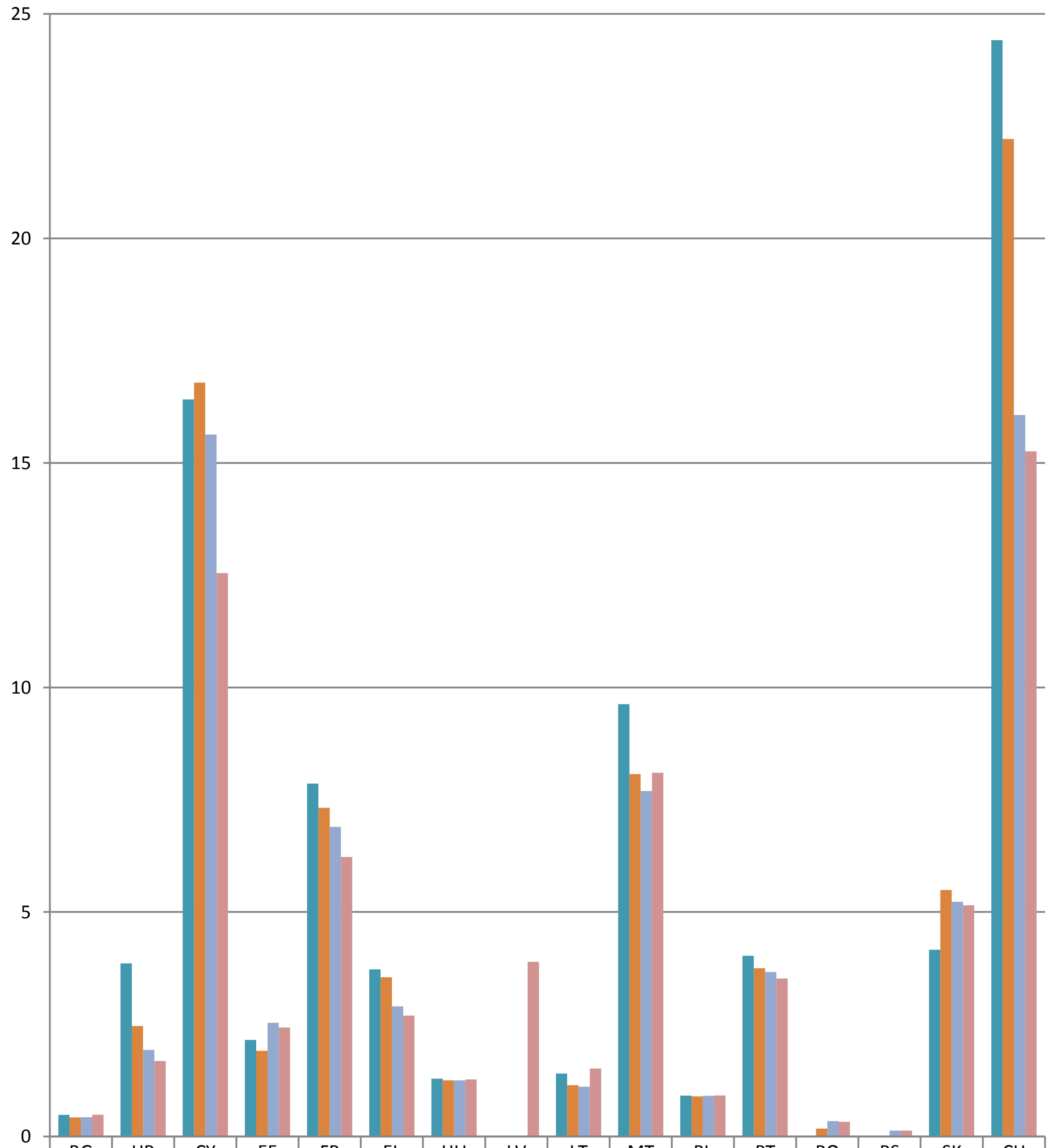
Figure 8 – Domestic items of correspondence per capita (excluding express)



	BG	HR	EE	FR	DE	EL	ES	HU	LV	LT	LU	MT	NL	PL	PT	RO	RS	SK	SI	CH
2008	10	59	51	256	196	51	112	79		22	235	95	185	48	102	29		50	151	353
2009	8	57	46	242	183	46	101	76		22	235	88	179	48	97	18		52	125	312
2010	7	55	33	233	185	43	97	77		19	221	87	168	48	93	16	13	51	123	304
2011	5	52	33	224	186	38		73	15	20		84	151	47	88	21	13	51	118	297

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

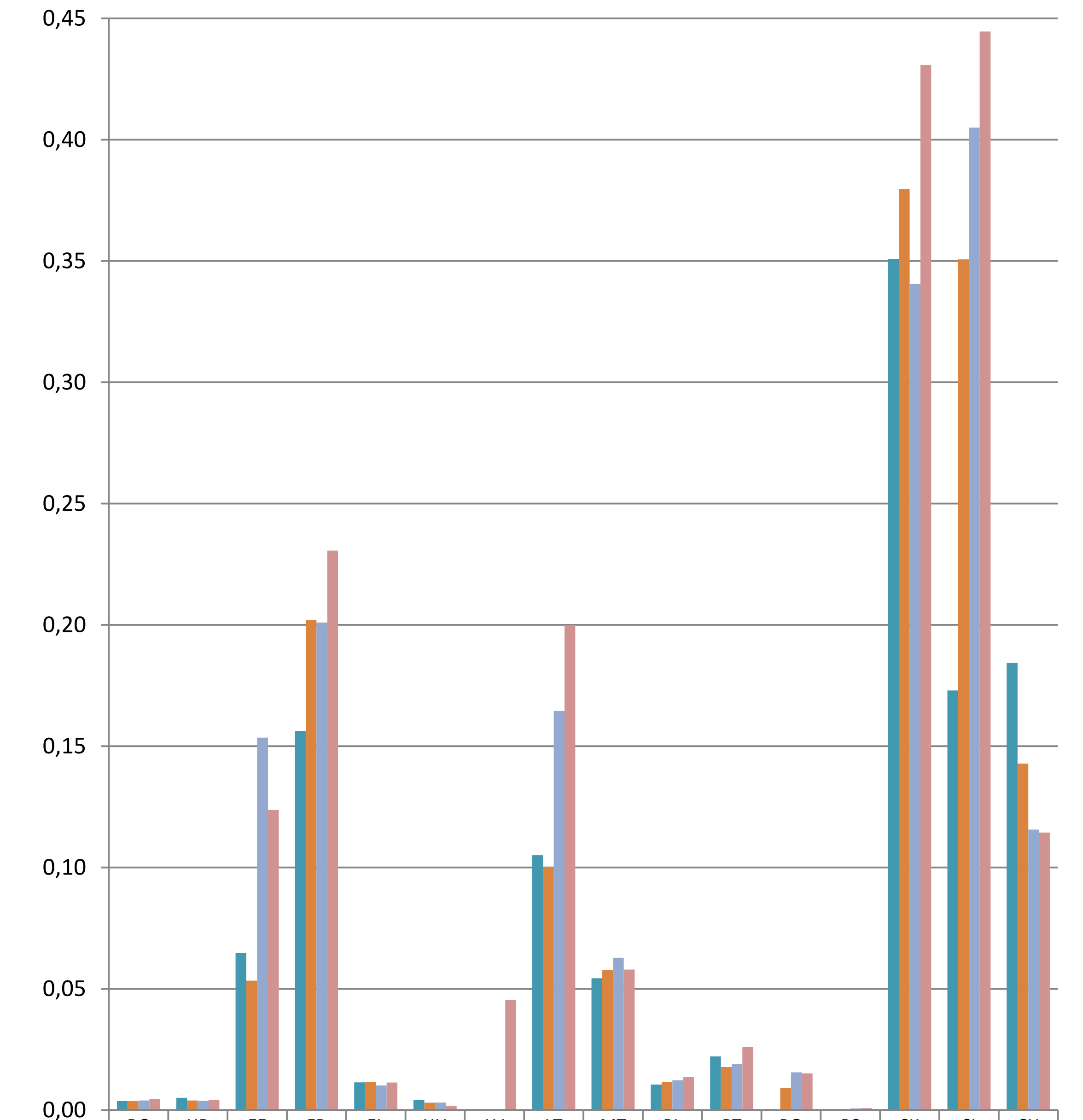
Figure 9 –Total traffic international outbound per capita (excluding express)



	BG	HR	CY	EE	FR	EL	HU	LV	LT	MT	PL	PT	RO	RS	SK	CH
2008	0,48	3,86	16,41	2,15	7,86	3,72	1,29		1,40	9,63	0,91	4,03	0,00		4,16	24,42
2009	0,43	2,46	16,79	1,91	7,32	3,55	1,25		1,14	8,07	0,89	3,75	0,18		5,49	22,22
2010	0,43	1,93	15,63	2,53	6,89	2,90	1,25		1,11	7,69	0,91	3,66	0,35	0,13	5,23	16,07
2011	0,49	1,68	12,55	2,43	6,23	2,69	1,27	3,89	1,52	8,10	0,91	3,52	0,33	0,13	5,15	15,26

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

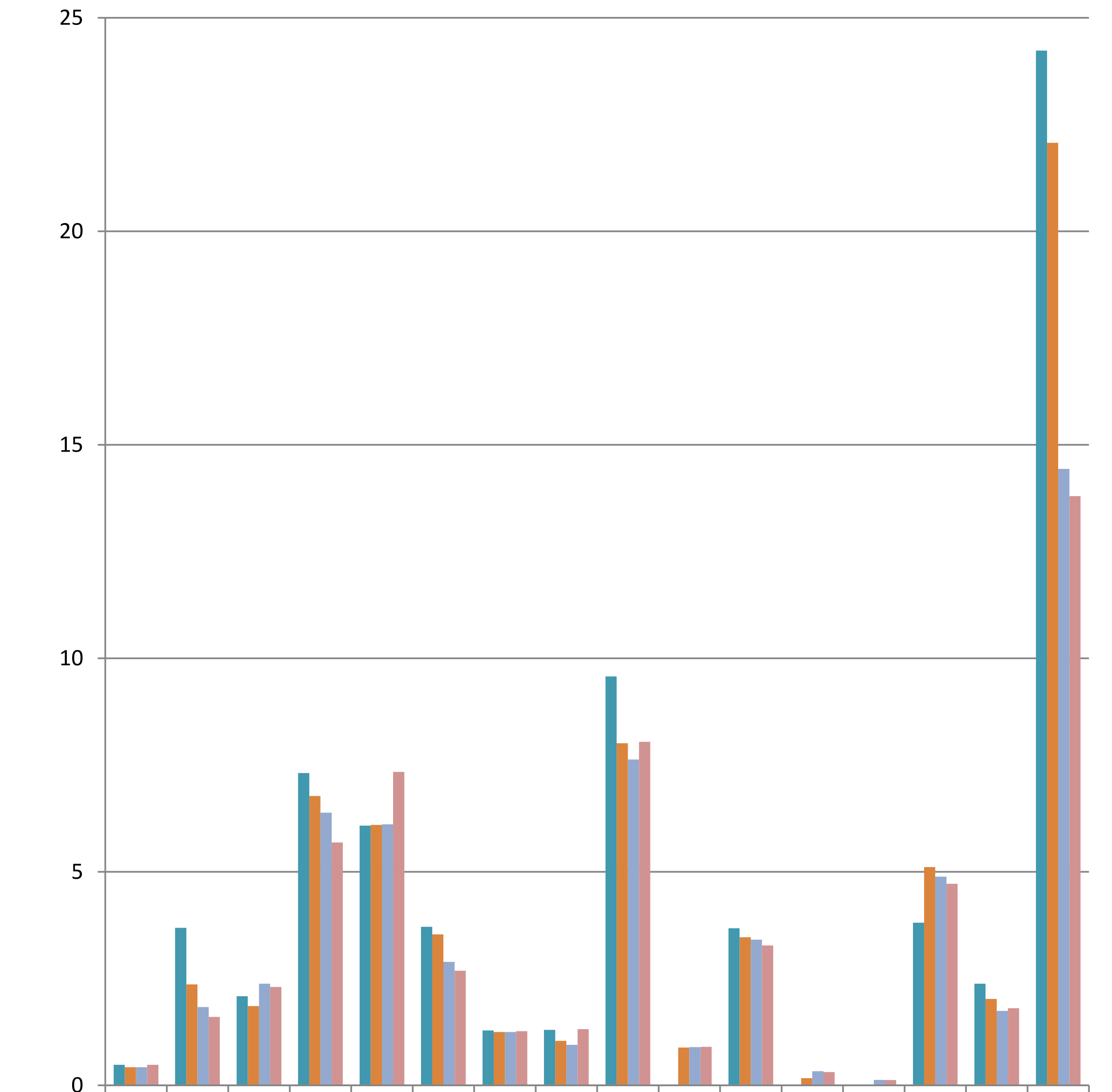
Figure 10 – Outbound parcels per capita (excluding express)



	BG	HR	EE	FR	EL	HU	LV	LT	MT	PL	PT	RO	RS	SK	SI	CH
2008	0,004	0,005	0,065	0,156	0,011	0,004		0,105	0,054	0,011	0,022			0,351	0,173	0,184
2009	0,004	0,004	0,053	0,202	0,012	0,003		0,100	0,058	0,012	0,018	0,009		0,380	0,351	0,143
2010	0,004	0,004	0,154	0,201	0,010	0,003		0,165	0,063	0,012	0,019	0,016	0,001	0,341	0,405	0,116
2011	0,004	0,004	0,124	0,231	0,011	0,002	0,045	0,200	0,058	0,014	0,026	0,015	0,001	0,431	0,445	0,114

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

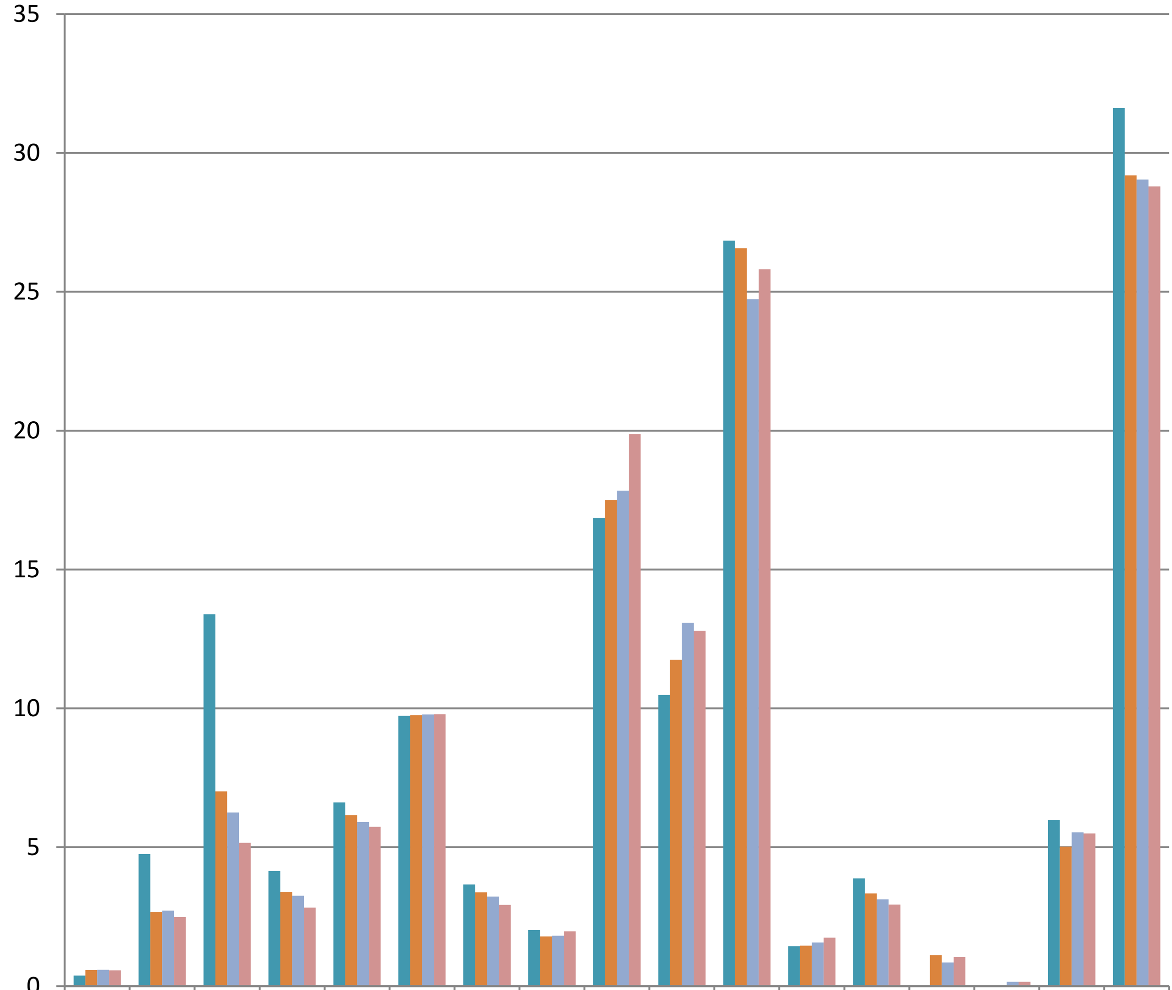
Figure 11 – Outbound items of correspondence per capita (excluding express)



	BG	HR	EE	FR	DE	EL	HU	LT	MT	PL	PT	RO	RS	SK	SI	CH
2008	0,5	3,7	2,1	7,3	6,1	3,7	1,3	1,3	9,6		3,7			3,8	2,4	24,2
2009	0,4	2,4	1,9	6,8	6,1	3,5	1,2	1,0	8,0	0,9	3,5	0,2		5,1	2,0	22,1
2010	0,4	1,8	2,4	6,4	6,1	2,9	1,2	0,9	7,6	0,9	3,4	0,3	0,1	4,9	1,7	14,4
2011	0,5	1,6	2,3	5,7	7,3	2,7	1,3	1,3	8,0	0,9	3,3	0,3	0,1	4,7	1,8	13,8

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

Figure 12 – International inbound per capita (excluding express)



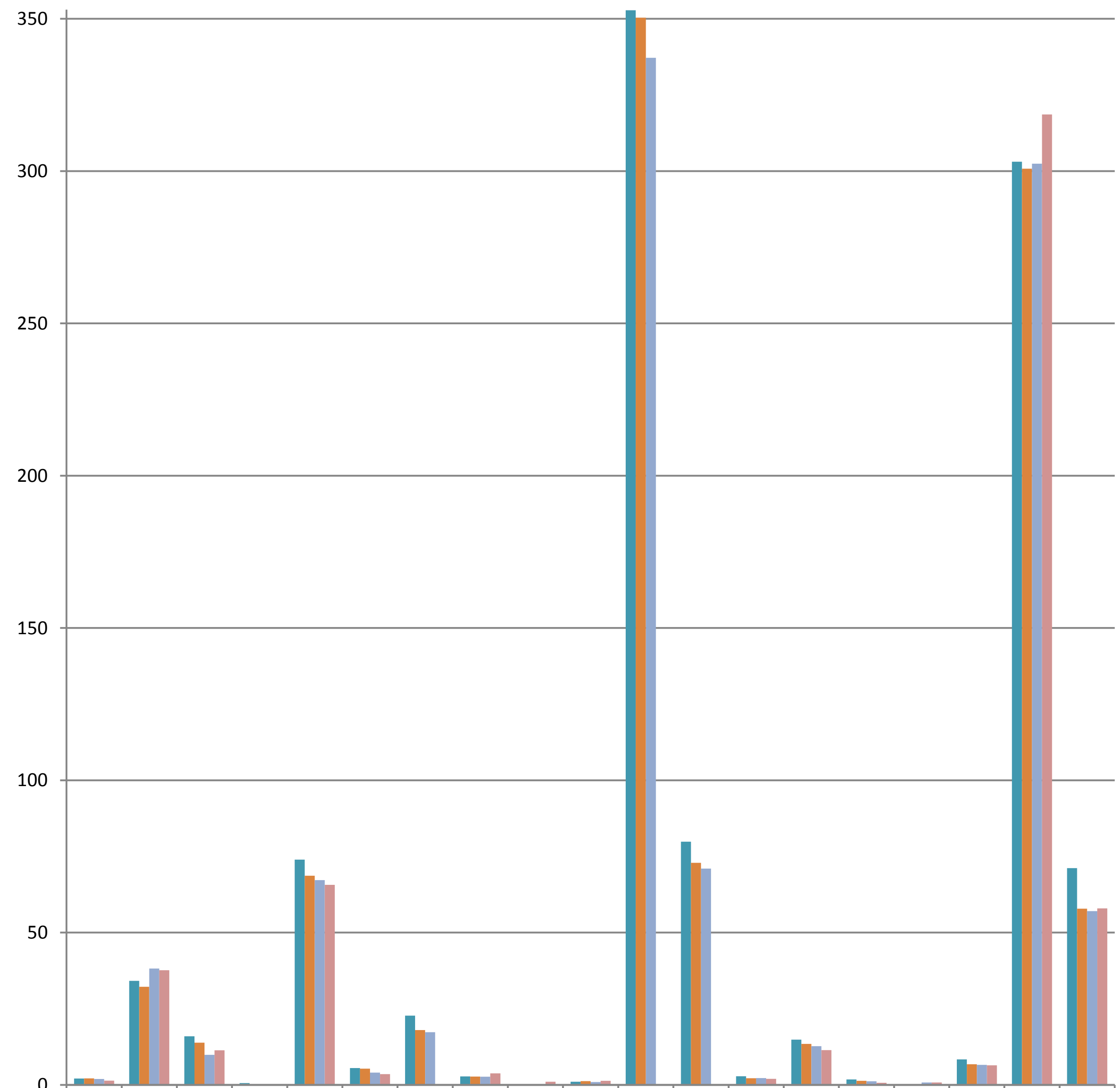
	BG	HR	CY	EE	FR	DE	EL	HU	LU	MT	NO	PL	PT	RO	RS	SK	CH
2008	0,38	4,76	13,39	4,14	6,61	9,73	3,66	2,02	16,86	10,48	26,84	1,44	3,88			5,97	31,62
2009	0,58	2,66	7,01	3,38	6,15	9,76	3,38	1,79	17,51	11,75	26,57	1,45	3,34	1,12		5,02	29,19
2010	0,59	2,71	6,25	3,25	5,90	9,78	3,22	1,81	17,84	13,08	24,73	1,57	3,12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

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

	2008	2009	2010	2011
NO	26,8	26,6	24,7	25,8

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

Figure 13 – Domestic direct mail per capita (excluding express)

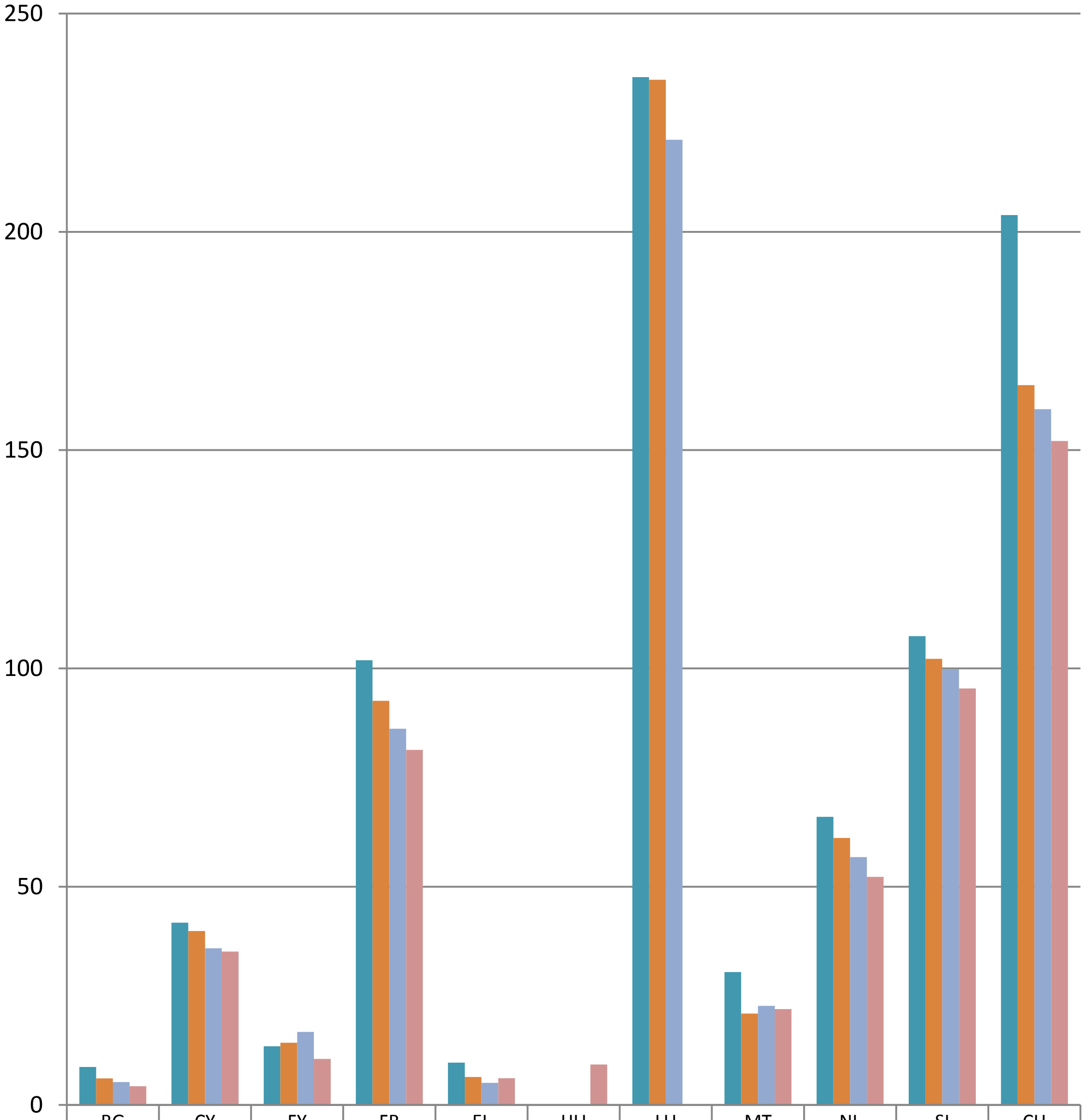


	BG	CY	EE	FY	FR	EL	ES	HU	LV	LT	LU	NL	PL	PT	RO	RS	SK	SI	UK
2008	2,1	34,2	15,9	0,6	73,9	5,5	22,7	2,8		1,0	352,8	79,9	2,8	14,9	1,8		8,4	303,1	71,1
2009	2,1	32,2	13,8	0,2	68,7	5,3	18,0	2,7		1,2	350,4	72,9	2,2	13,4	1,3		6,8	300,8	57,8
2010	1,9	38,2	9,9	0,2	67,2	4,0	17,3	2,7		0,9	337,2	71,0	2,2	12,7	1,2	0,8	6,5	302,5	57,0
2011	1,4	37,6	11,4	0,1	65,7	3,5		3,8	1,0	1,3			2,0	11,4	0,7	0,8	6,4	318,6	57,9

* 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 :CZ, IE, NL
Not available :AT, BE, CH, DK, DE, FI, LU,MT, NO, SE
US only :EL, MT
USP only :ES, HU, LU, PT, RS, SI
Single piece only : BG, LV, LT
NL : four largest operators

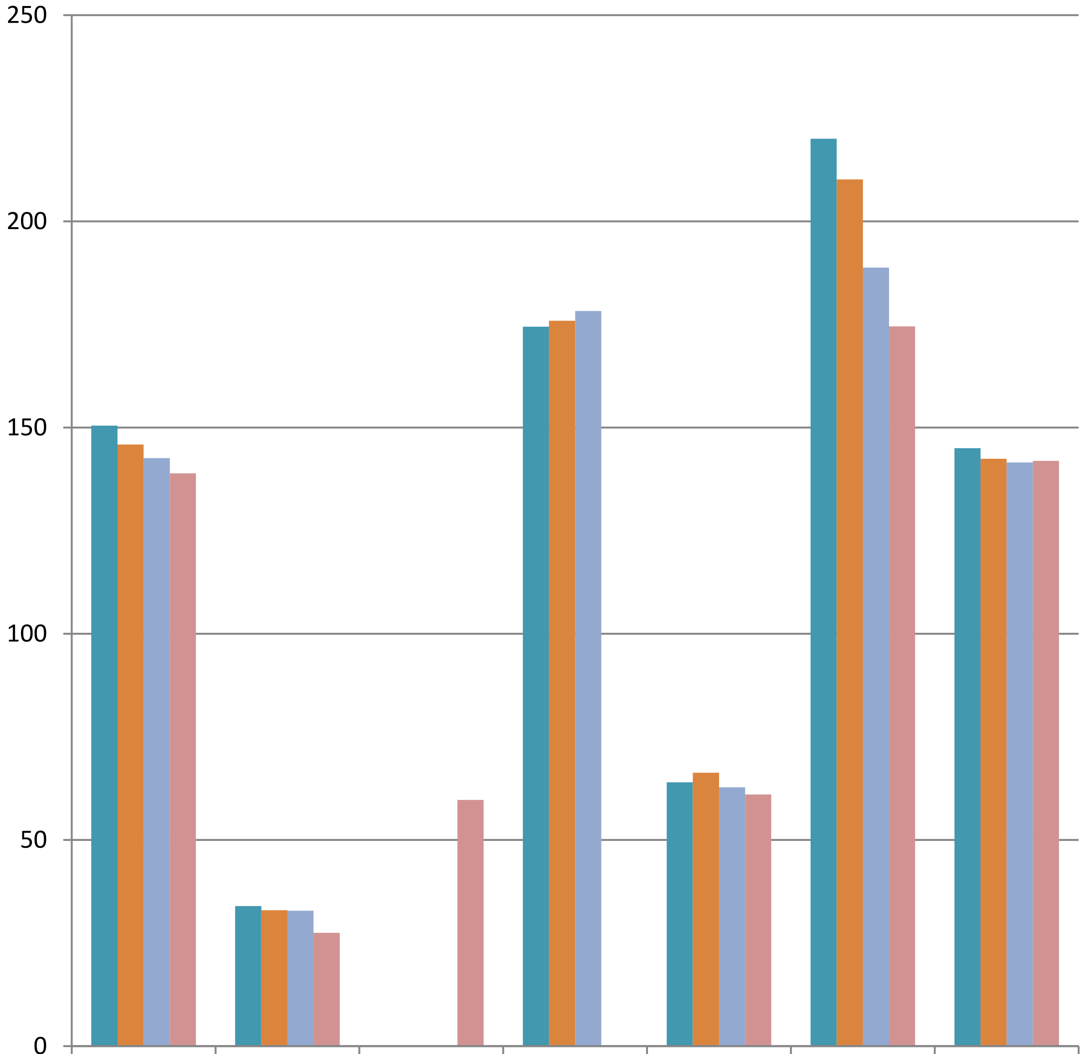
Figure 14 – Domestic single piece items per capita (excluding express)*



	BG	CY	FY	FR	EL	HU	LU	MT	NL	SI	CH
2008	8,7	41,7	13,4	101,9	9,7		235,4	30,5	66,0	107,4	203,9
2009	6,1	39,8	14,2	92,6	6,4		234,9	20,9	61,1	102,2	164,9
2010	5,3	35,9	16,7	86,2	5,1		221,1	22,7	56,8	99,8	159,4
2011	4,3	35,1	10,5	81,3	6,1	9,3		22,0	52,2	95,4	152,1

* 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.
Note:
Confidential : CZ, DK, IE
Not available :AT, BE, EE, ES, FI, HR,LT, LU, LV,MT, NO, PL, PT, RO, RS, SE, SK, UK
US only : MT
USP only :CH, EL, ES, HU, LU, NL, SI.

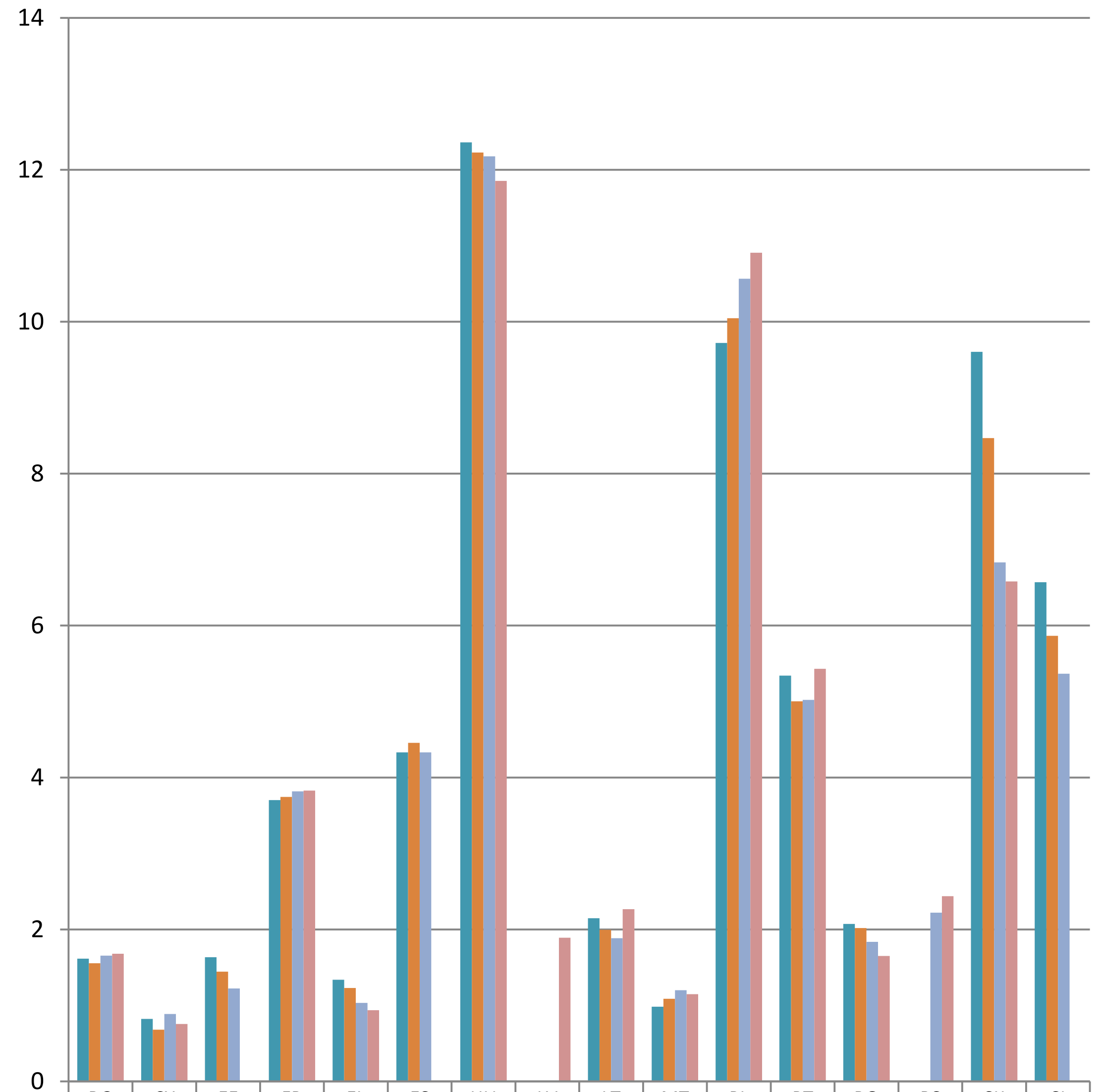
Figure 15 – Domestic bulk mail per capita (excluding express)*



	FR	EL	HU	LU	MT	NL	CH
2008	150,5	34,0		174,5	64,0	220,0	145,0
2009	145,9	33,0		175,9	66,3	210,2	142,4
2010	142,6	32,8		178,3	62,8	188,8	141,5
2011	138,9	27,5	59,7		61,0	174,5	141,9

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

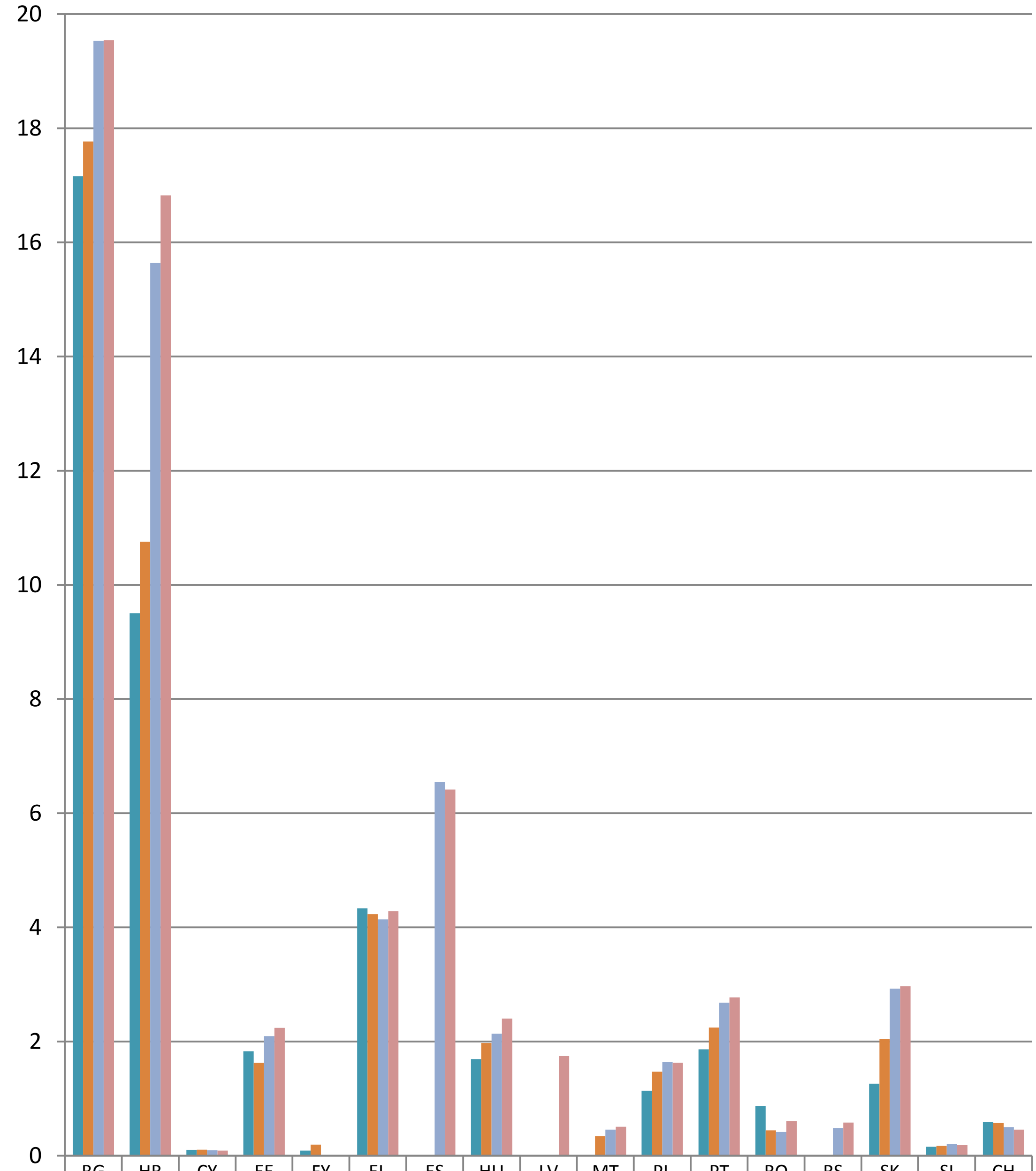
Figure 16 – Domestic registered mail per capita (excluding express)*



	BG	CY	EE	FR	EL	ES	HU	LV	LT	MT	PL	PT	RO	RS	SK	SI
2008	1,62	0,82	1,63	3,70	1,34	4,33	12,36		2,15	0,98	9,72	5,34	2,07		9,60	6,57
2009	1,55	0,68	1,44	3,75	1,23	4,46	12,23		1,99	1,09	10,05	5,00	2,02		8,47	5,87
2010	1,65	0,89	1,22	3,82	1,03	4,33	12,18		1,89	1,20	10,57	5,02	1,84	2,22	6,83	5,37
2011	1,68	0,75		3,83	0,94		11,85	1,89	2,27	1,15	10,91	5,43	1,65	2,44	6,58	

*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 addresseeNote:
Confidential : CZ,DK, IE
Not available :AT, BE, CH, DK, DE, EE (2011), ES (2011), FI, FY, LT, LU,NL, NO, SE, UK
US only : MT
USP only : EL, HU, PL, PT, RS, SI, SK
Single piece only : BG, LT, LV.

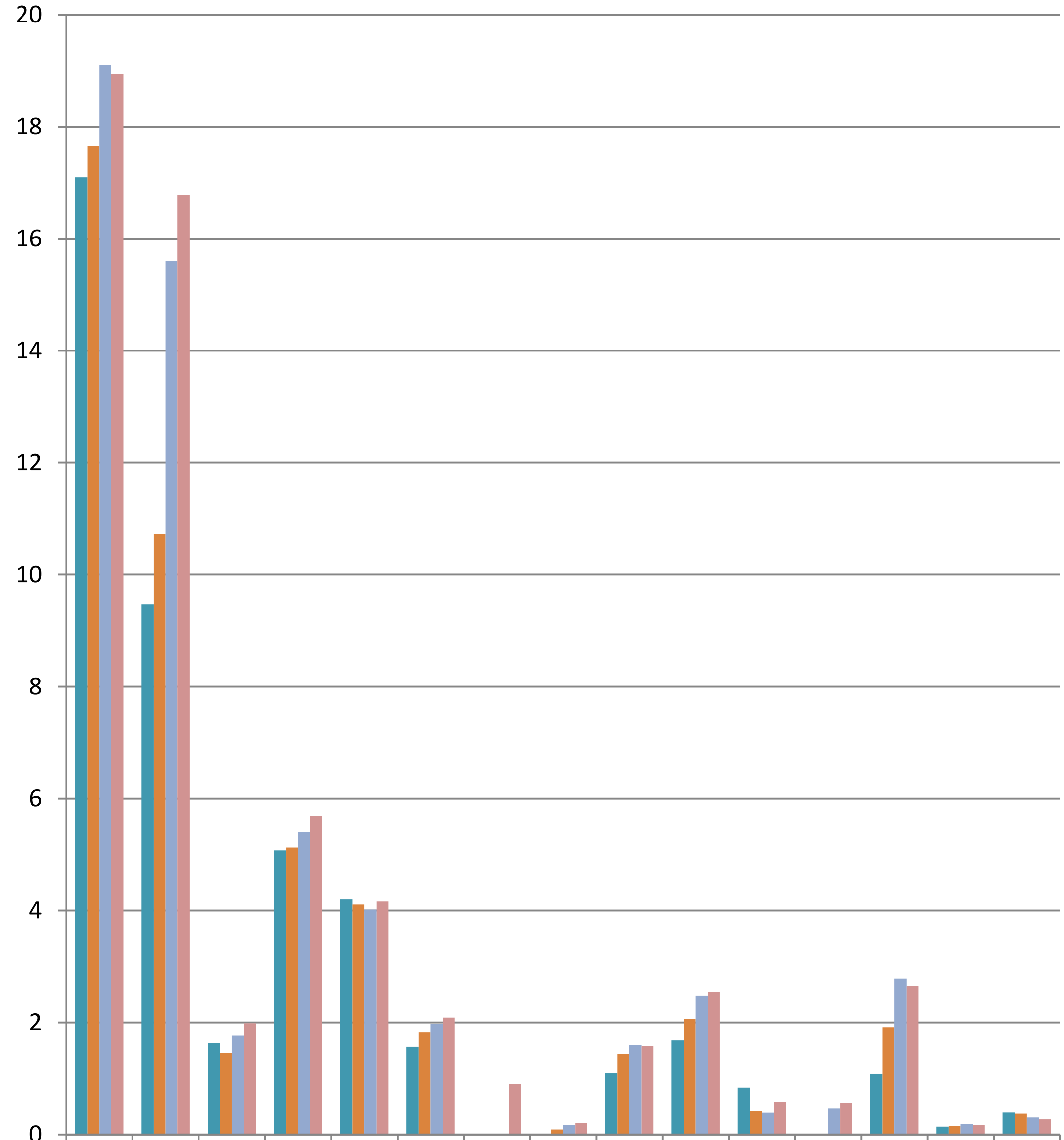
Figure 17 – Express total traffic per capita



	BG	HR	CY	EE	FY	EL	ES	HU	LV	MT	PL	PT	RO	RS	SK	SI	CH
2008	17,16	9,51	0,10	1,83	0,09	4,33		1,69			1,14	1,86	0,87		1,26	0,16	0,59
2009	17,77	10,76	0,10	1,63	0,19	4,23		1,97		0,34	1,47	2,24	0,44		2,05	0,17	0,57
2010	19,53	15,64	0,10	2,10		4,14	6,55	2,14		0,46	1,64	2,68	0,41	0,49	2,92	0,20	0,50
2011	19,54	16,82	0,09	2,24		4,28	6,41	2,40	1,74	0,51	1,63	2,77	0,61	0,58	2,97	0,19	0,46

Note:
Confidential : CZ, DK, IE
Not available :AT, DE, ES, FI, FR, FY (2010, 2011), 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

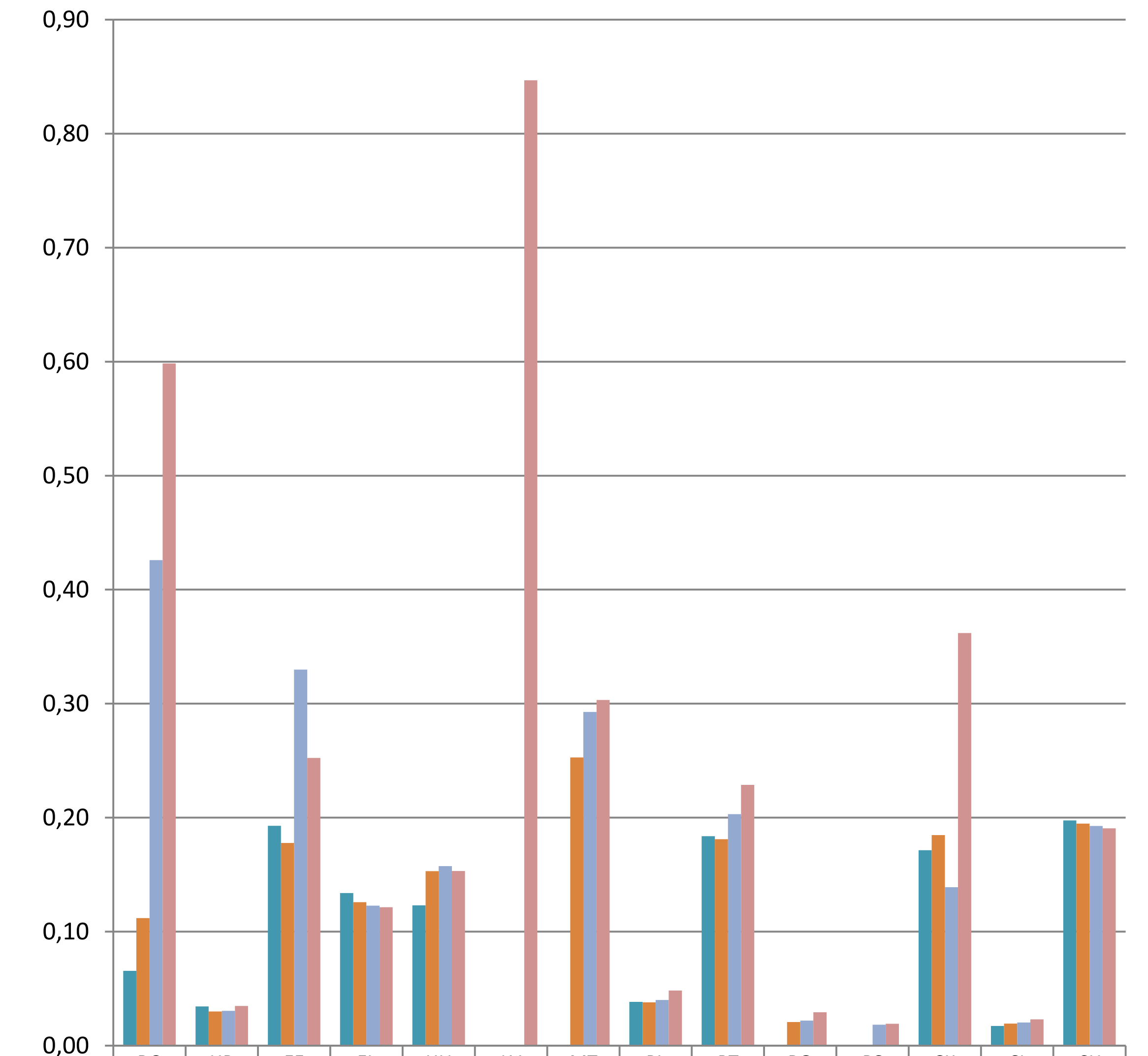
Figure 18 – Express domestic items per capita



	BG	HR	EE	FR	EL	HU	LV	MT	PL	PT	RO	RS	SK	SI	CH
2008	17,09	9,47	1,64	5,08	4,20	1,57			1,10	1,68	0,84		1,09	0,14	0,40
2009	17,66	10,73	1,45	5,13	4,11	1,82		0,09	1,43	2,06	0,42		1,92	0,15	0,38
2010	19,11	15,61	1,77	5,41	4,02	1,98		0,16	1,60	2,48	0,39	0,47	2,79	0,18	0,31
2011	18,94	16,79	1,99	5,69	4,16	2,09	0,90	0,20	1,58	2,55	0,58	0,56	2,65	0,17	0,27

Note:
Confidential : CZ, DK, IE
Not available :AT, BE, CY, DE, ES, FI,FY, FR (2011), HU (2011), 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

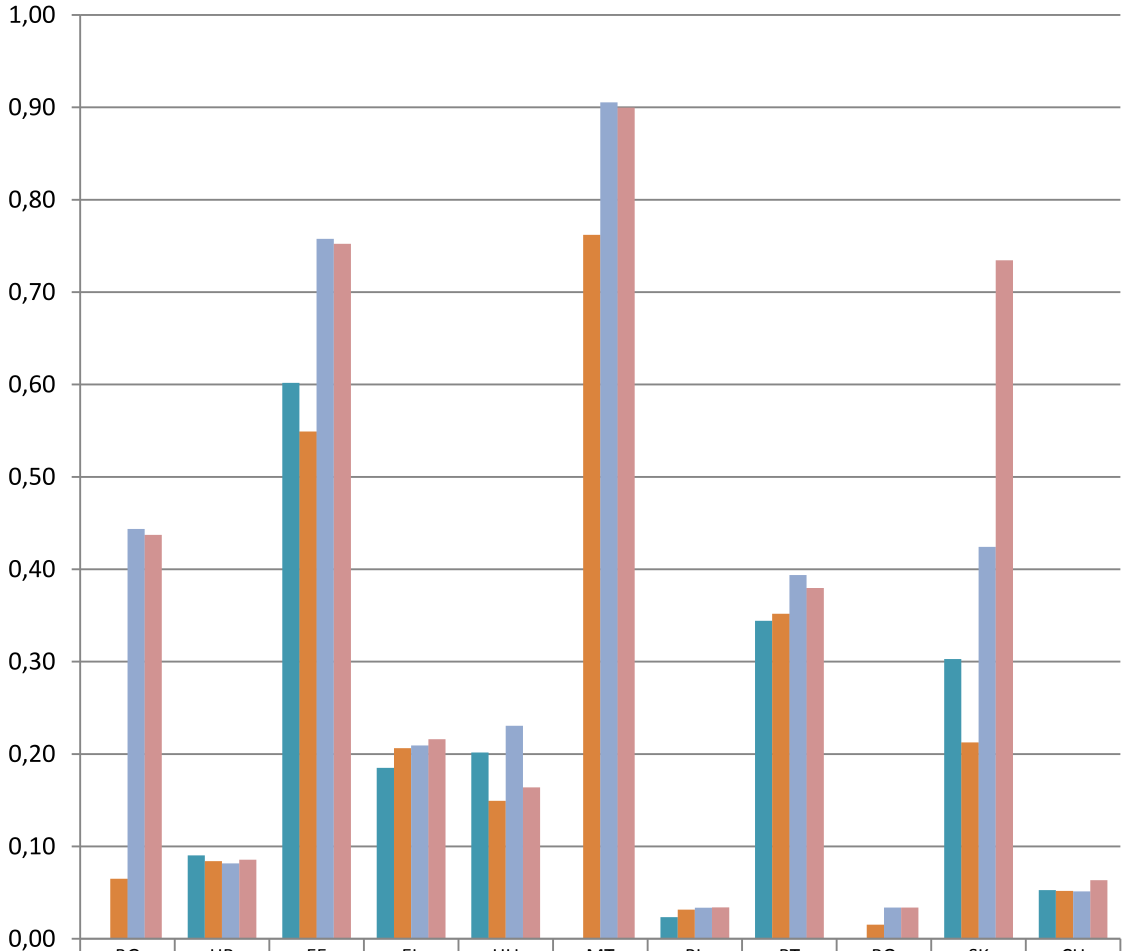
Figure 19 – Express international outbound per capita



	BG	HR	EE	EL	HU	LV	MT	PL	PT	RO	RS	SK	SI	CH
2008	0,07	0,03	0,19	0,13	0,12			0,04	0,18			0,17	0,02	0,20
2009	0,11	0,03	0,18	0,13	0,15		0,25	0,04	0,18	0,02		0,18	0,02	0,19
2010	0,43	0,03	0,33	0,12	0,16		0,29	0,04	0,20	0,02	0,02	0,14	0,02	0,19
2011	0,60	0,03	0,25	0,12	0,15	0,85	0,30	0,05	0,23	0,03	0,02	0,36	0,02	0,19

Note:
Confidential : CZ, IE
Not available :AT, BE, CY, DK, DE, ES, FI,FR, FY, HU (2011), LT, LU, NL, NO, RO (2008), SE, UK
USP only :CH
Single piece only :BG, CH, LV
Authorized postal service providers only : PT
General Authorisations only: EL

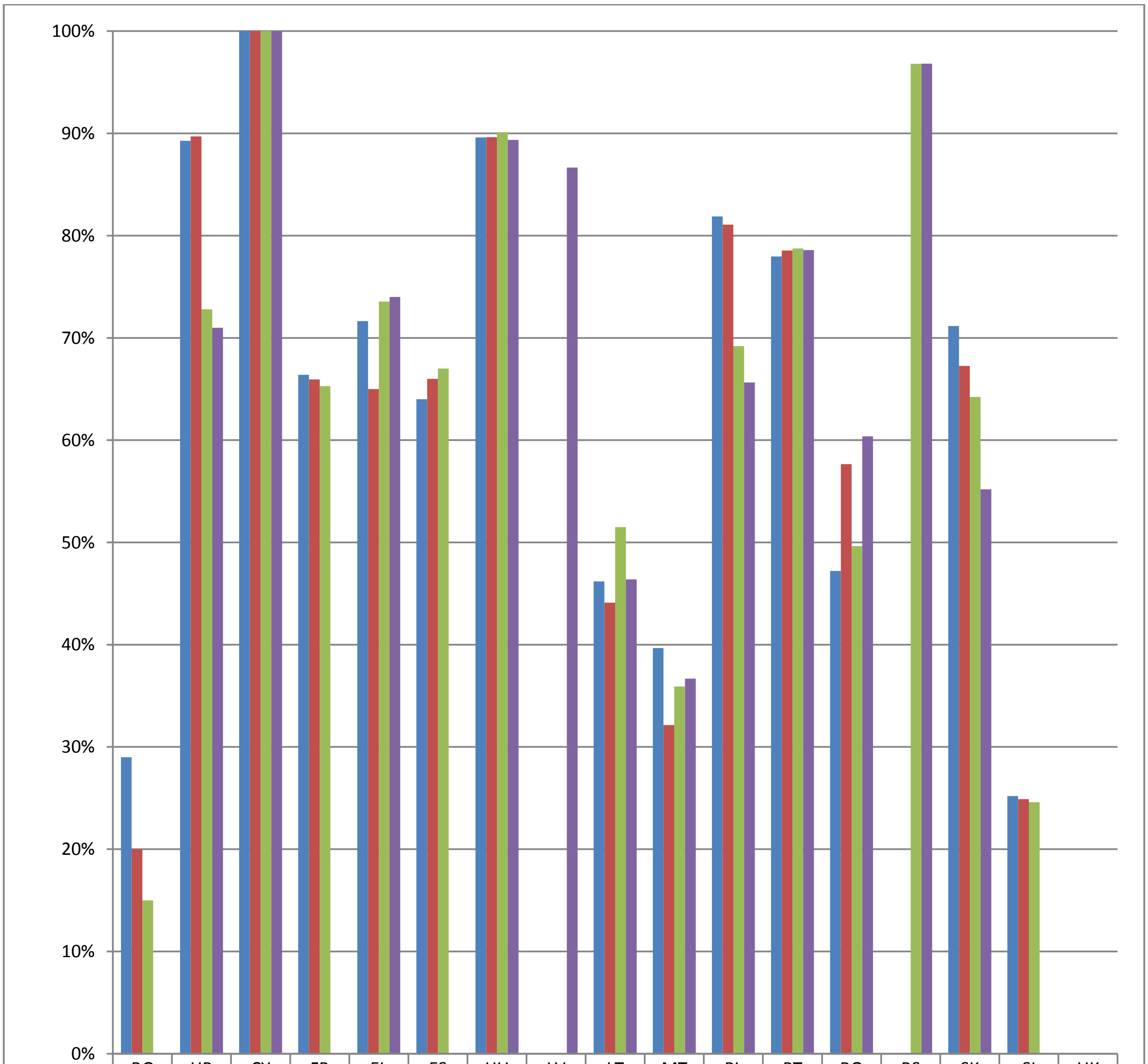
Figure 20 – Express international inbound per capita



	BG	HR	EE	EL	HU	MT	PL	PT	RO	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	0,22	0,16	0,90	0,03	0,38	0,03	0,73	0,06

Note:
Confidential : CZ
Not available :AT, BE, CY, DK, DE, ES, FI,FR, FY, HU (2011), IE, LT, LV, LU,NO, NL, RO (2008), RS,SE, SI, UK
USP only :CH
Single piece only :BG
Authorized postal service providers only : PT
General Authorisations only: EL

Figure 21 – Percentage of reserved total traffic*

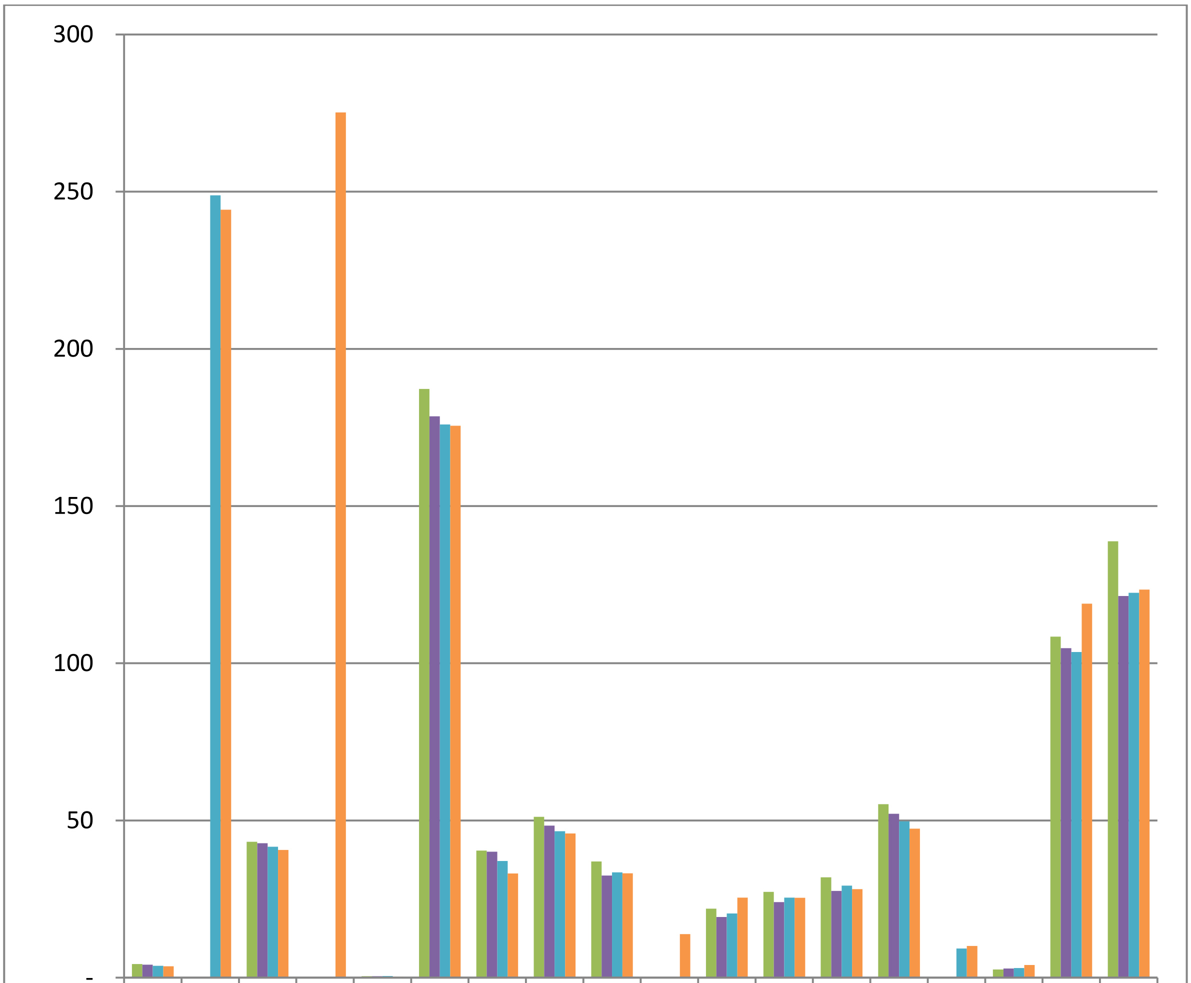


	BG	HR	CY	FR	EL	ES	HU	LV	LT	MT	PL	PT	RO	RS	SK	SI	UK
2008	29%	89%	100%	66%	72%	64%	90%		46%	40%	82%	78%	47%		71%	25%	0
2009	20%	90%	100%	66%	65%	66%	90%		44%	32%	81%	79%	58%		67%	25%	0
2010	15%	73%	100%	65%	74%	67%	90%		51%	36%	69%	79%	50%	97%	64%	25%	0
2011	0%	71%	100%	0%	74%	0%	89%	87%	46%	37%	66%	79%	60%	97%	55%	0%	0

* Percentage of reserved traffic = total traffic in the reserved area / total traffic. Total traffic = domestic traffic + international outbound traffic. Does not include international inbound traffic.
Note:
Confidential : CZ, IE, LT
Not available :AT, BE, CY, DK, DE, EE, FI,FY,LT, LU, NL, NO, SE
USP only :CH, EL,ES,LV, RS
Single piece only : BG, LV.

4- Revenues

Figure 22 – Total revenues per capita in € (excluding express)



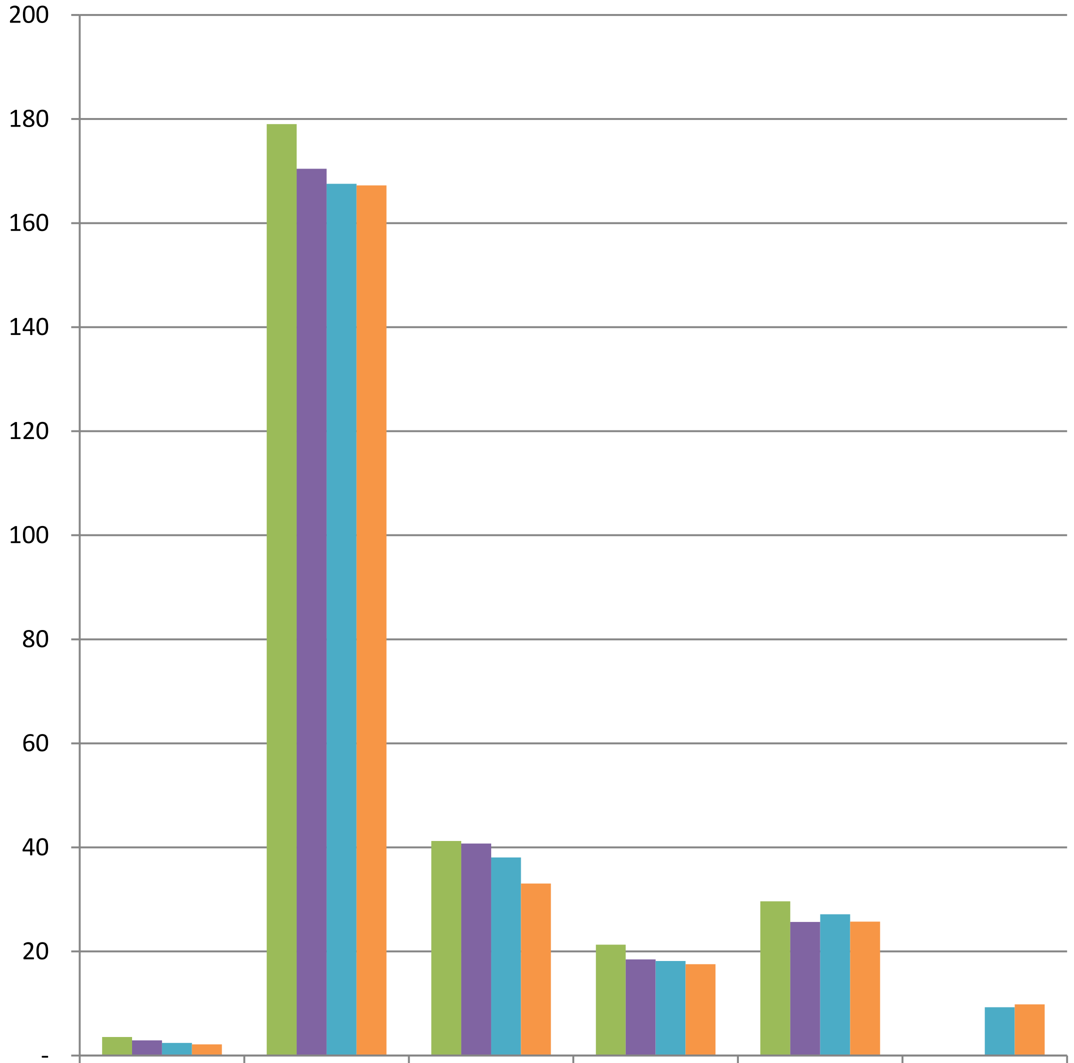
	BG	HR	CY	DE	FY	FR	EL	ES	HU	LV	LT	MT	PL	PT	RS	SK	SI	UK
2008	4,3	-	43,2	-	0,4	187,	40,4	51,1	37,0	-	21,9	27,3	31,9	55,2	-	2,6	108,	138,
2009	4,1	-	42,8	-	0,5	178,	40,1	48,4	32,5	-	19,3	24,0	27,6	52,1	-	2,9	104,	121,
2010	3,8	248,	41,6	-	0,5	176,	37,1	46,6	33,5	-	20,4	25,5	29,3	49,7	9,3	3,1	103,	122,
2011	3,6	244,	40,6	275,	0,3	175,	33,2	45,9	33,2	13,8	25,5	25,4	28,1	47,4	10,1	4,0	118,	123,

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

Country	2008	2009	2010	2011
DE	~ 327	~312	~339	
NO	359	328	353	375

Confidential :CH,CZ, DK, IE
Not available : BE (2011), EE, ES (2011), FI, LU,NL, RO
USP only : AT, BE, ES, HU,RS
US only :EL, MT
Single piece only :BG, LT, LV

Figure 23 – Revenues for domestic items, per capita, in € (excluding express)



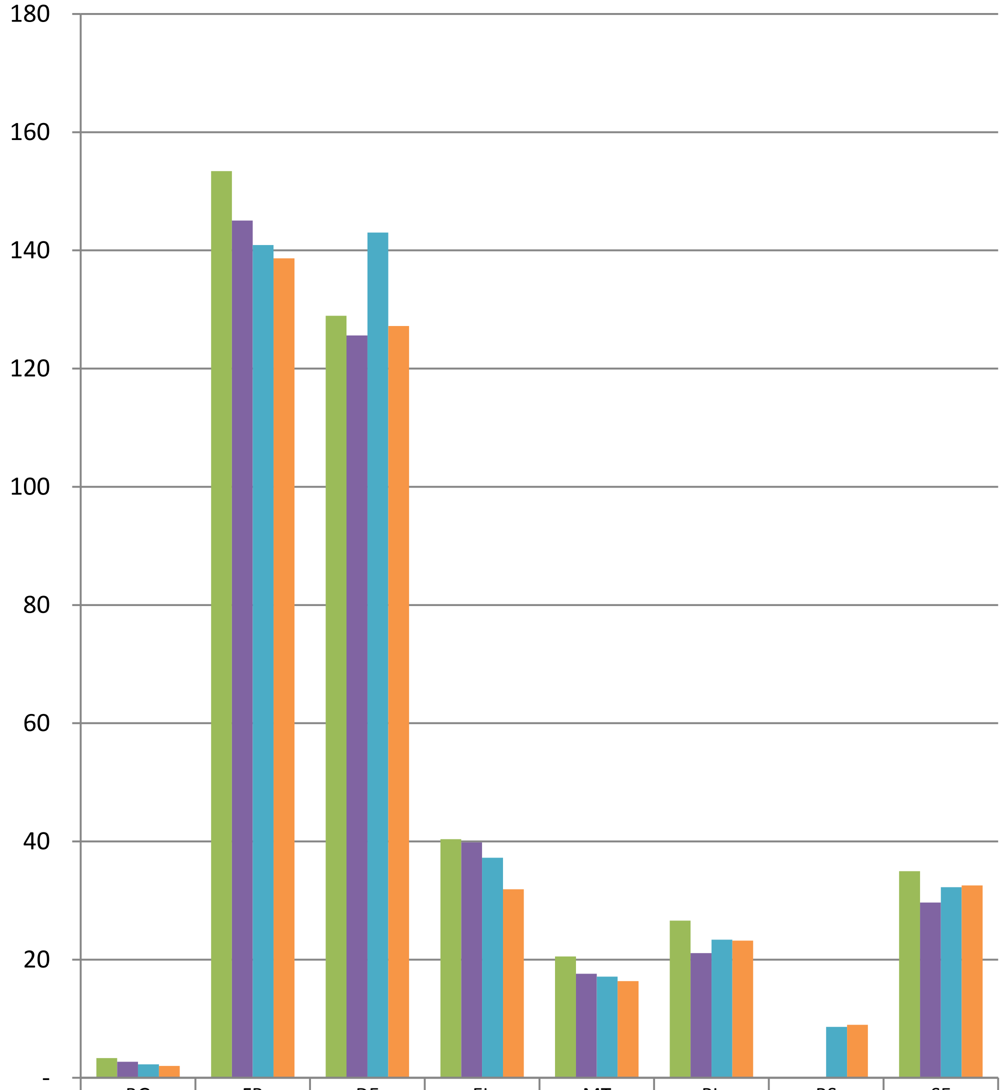
	BG	FR	EL	MT	PL	RS
2008	3,56	179,01	41,23	21,31	29,64	-
2009	2,91	170,44	40,75	18,46	25,67	-
2010	2,41	167,54	38,06	18,15	27,16	9,28
2011	2,15	167,24	33,04	17,56	25,72	9,82

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

Country	2008	2009	2010	2011
NO	330	297	317	349

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

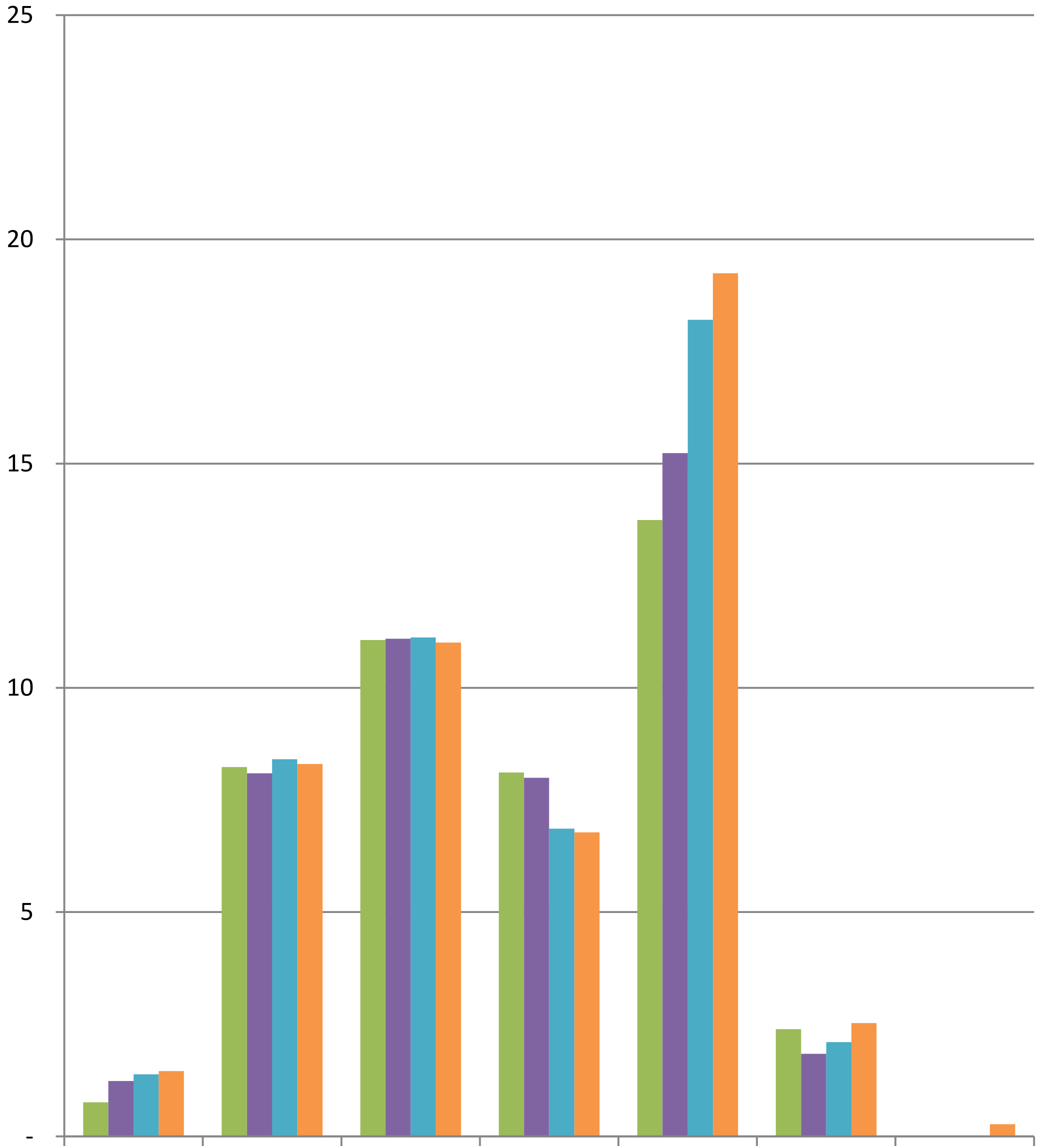
Figure 24 – Revenues for letter post items, per capita, in € (excluding express)



	BG	FR	DE	EL	MT	PL	RS	SE
2008	3,4	153,4	128,9	40,4	20,5	26,6	-	35,0
2009	2,7	145,0	125,6	39,8	17,6	21,1	-	29,7
2010	2,3	140,9	143,0	37,2	17,1	23,4	8,6	32,3
2011	2,0	138,7	127,2	31,9	16,4	23,2	9,0	32,6

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

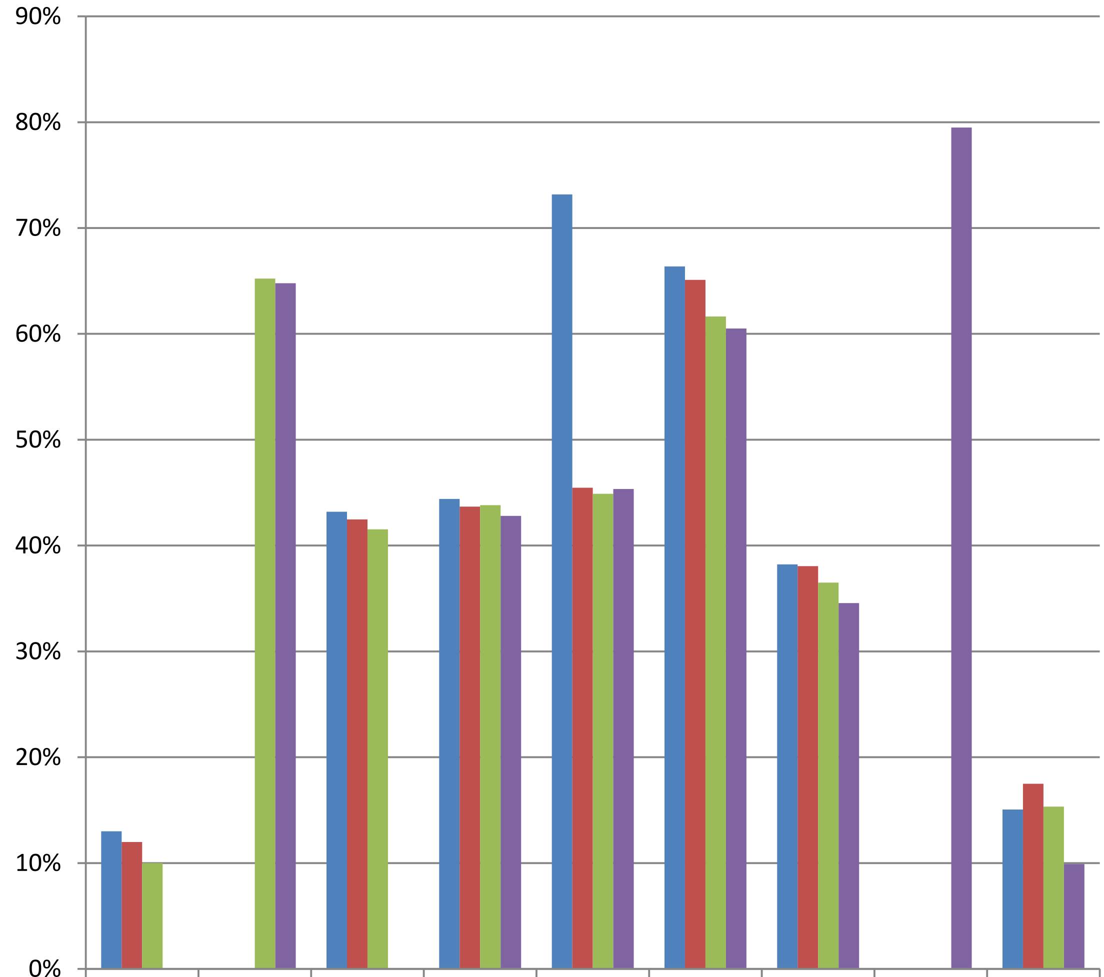
Figure 25 – Revenues for international items, per capita, in € (excluding express)



	BG	FR	DE	EL	MT	PL	RS
2008	0,8	8,2	11,1	8,1	13,7	2,4	-
2009	1,2	8,1	11,1	8,0	15,2	1,8	-
2010	1,4	8,4	11,1	6,9	18,2	2,1	-
2011	1,5	8,3	11,0	6,8	19,2	2,5	0,3

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

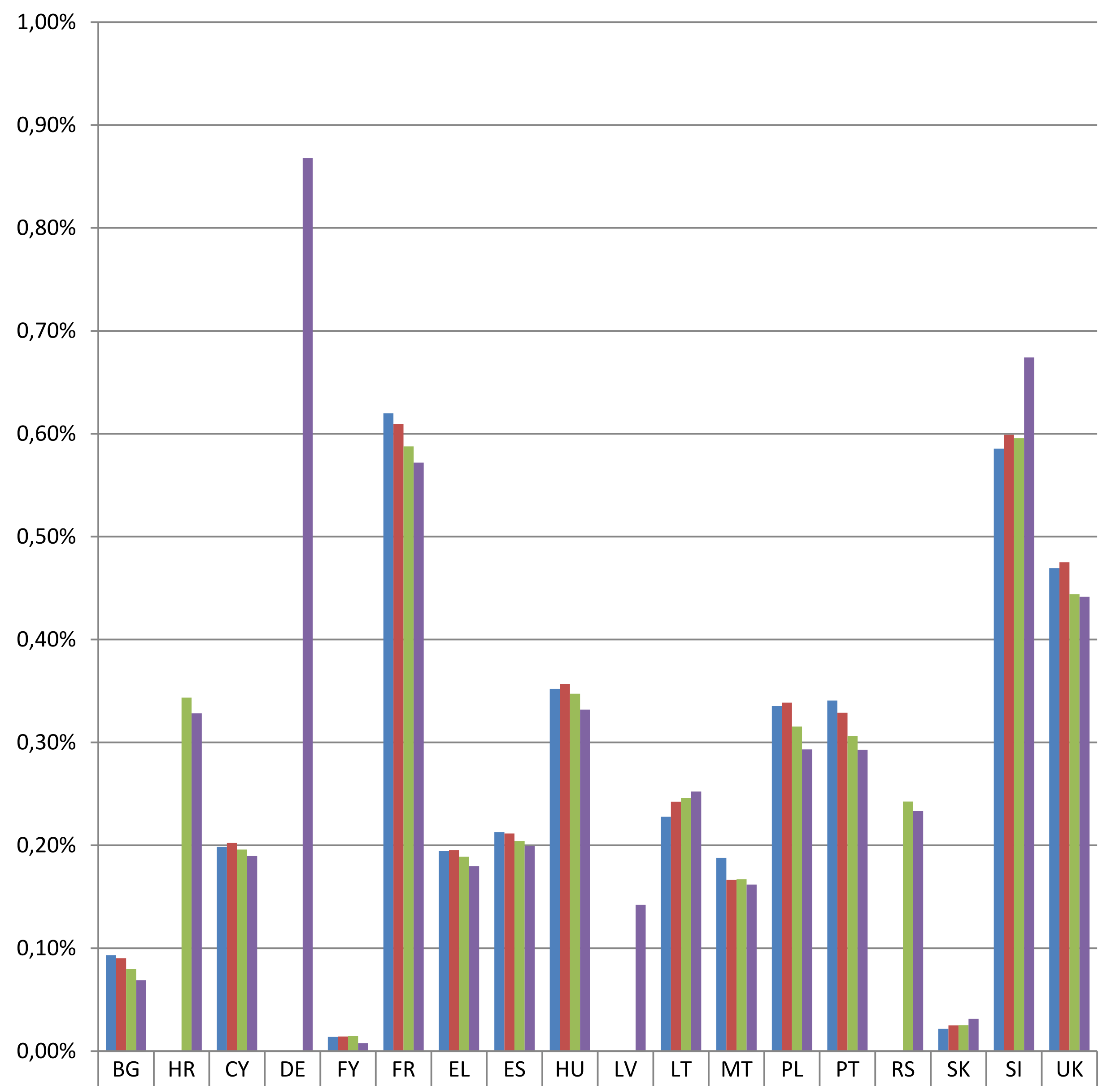
Figure 26 – Percentage of reserved total revenues



	BG	HR	FR	HU	MT	PL	PT	RS	SK
2008	13%		43%	44%	73%	66%	38%		15%
2009	12%		42%	44%	45%	65%	38%		17%
2010	10%	65%	42%	44%	45%	62%	36%		15%
2011		65%	0%	43%	45%	61%	35%	80%	10%

Note:
Confidential :CH, CZ, EL, IE
Not available : AT,BE, CY, ES,FI, FY, LV, NO, SI, UK
USP only :PL, RS
Single piece only : LT, MT
USP, Letter post up to 50gr : EL

Figure 27 – Total revenues (excluding express) as % of the GDP*



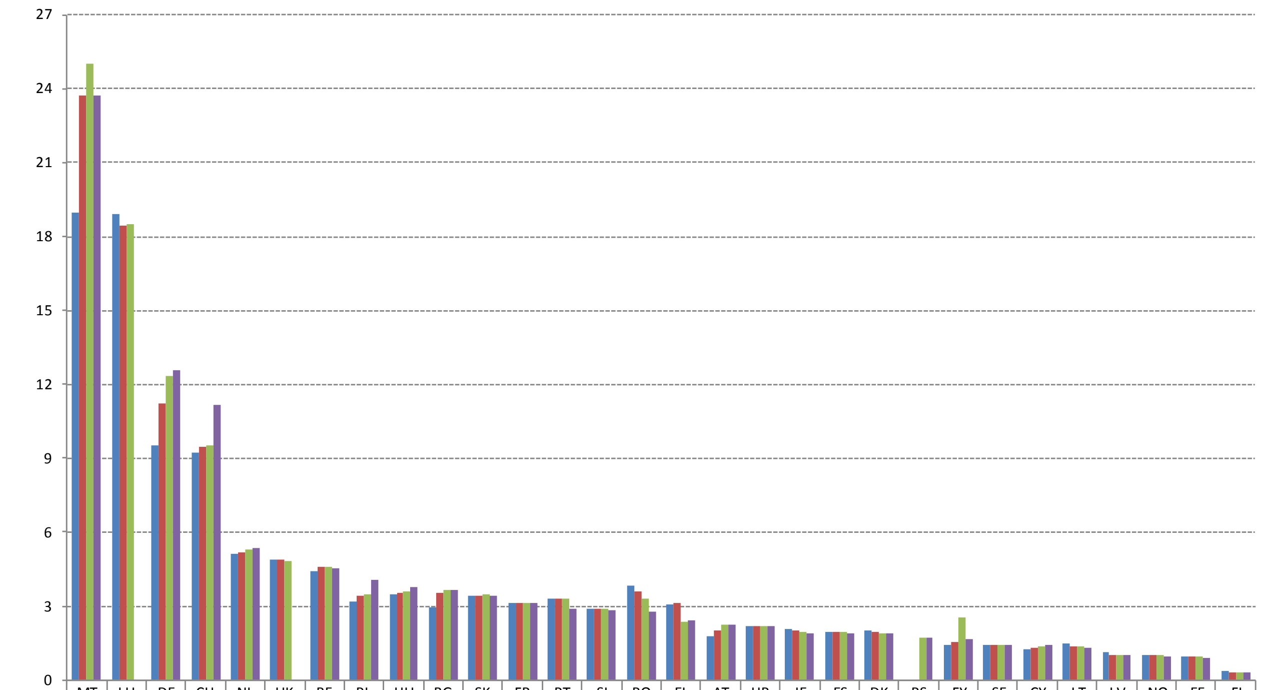
	BG	HR	CY	DE	FY	FR	EL	ES	HU	LV	LT	MT	PL	PT	RS	SK	SI	UK
2008	0,09		0,20		0,01	0,62	0,19	0,21	0,35		0,23	0,19	0,34	0,34		0,02	0,59	0,47
2009	0,09		0,20		0,01	0,61	0,20	0,21	0,36		0,24	0,17	0,34	0,33		0,02	0,60	0,48
2010	0,08	0,34	0,20		0,01	0,59	0,19	0,20	0,35		0,25	0,17	0,32	0,31	0,24	0,03	0,60	0,44
2011	0,07	0,33	0,19	0,87	0,01	0,57	0,18	0,20	0,33	0,14	0,25	0,16	0,29	0,29	0,23	0,03	0,67	0,44

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

5- Postal network indicators

Postal establishments[4]

Figure 28 – Postal coverage (Number of postal establishments per 100km2)



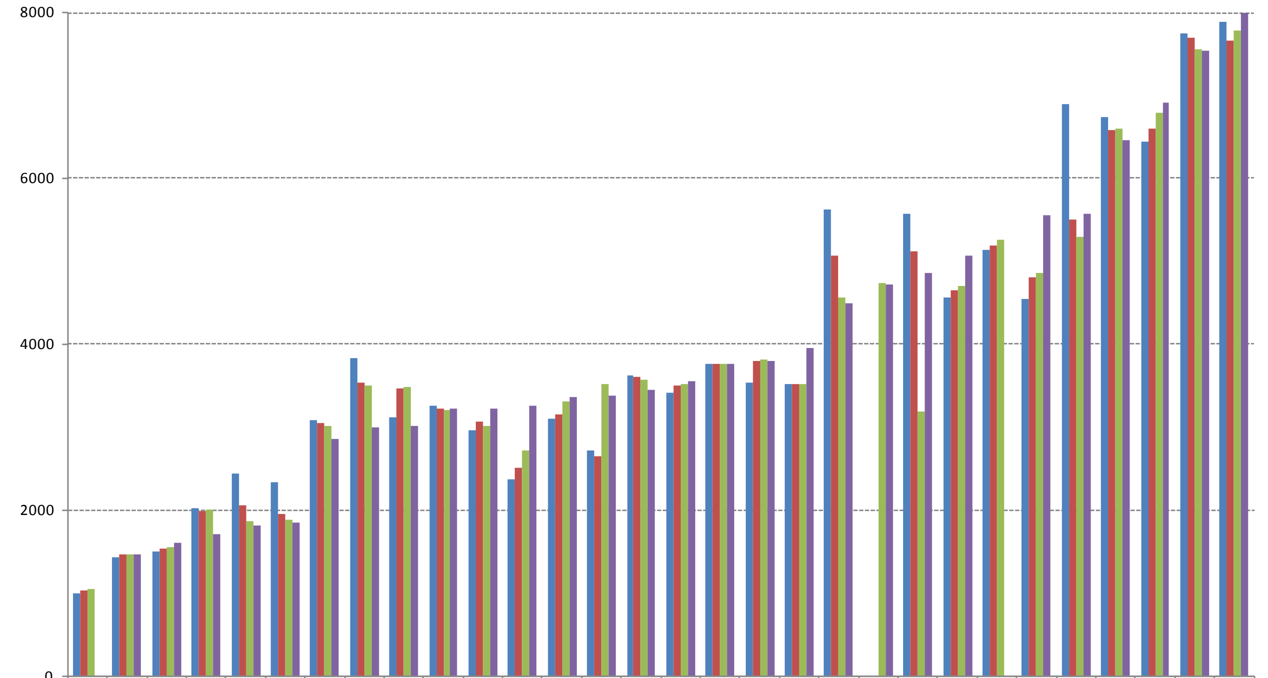
	MT	LU	DE	CH	NL	UK	BE	PL	HU	BG	SK	FR	PT	SI	RO
2008	18,99	18,91	9,52	9,22	5,09	4,88	4,43	3,20	3,50	2,94	3,39	3,10	3,27	2,91	3,81
2009	23,73	18,45	11,20	9,47	5,16	4,86	4,60	3,40	3,52	3,52	3,43	3,10	3,28	2,86	3,59
2010	25,00	18,52	12,32	9,55	5,28	4,83	4,57	3,50	3,57	3,63	3,45	3,10	3,28	2,87	3,31
2011	23,73		12,60	11,14	5,33		4,52	4,09	3,75	3,67	3,44	3,10	2,91	2,84	2,75

	EL	AT	HR	IE	ES	DK	RS	FY	SE	CY	LT	LV	NO	EE	FI
2008	3,05	1,79	2,17	2,04	1,97	2,01	0,00	1,43	1,41	1,26	1,46	1,14	0,98	0,96	0,34
2009	3,13	1,99	2,17	2,02	1,95	1,97	0,00	1,56	1,42	1,31	1,35	1,02	0,98	0,93	0,33
2010	2,36	2,21	2,19	1,93	1,93	1,91	1,71	2,50	1,42	1,34	1,34	1,02	0,98	0,95	0,33
2011	2,42	2,24	2,19	1,91	1,90	1,88	1,70	1,65	1,43	1,41	1,31	1,02	0,96	0,89	0,29

Notes:
LU, RO, SI, FY, CY, FI: Calculations by ERGP, based on the answers from NRAs and area of country (source: Eurostat).
Only USP: UK, BE, FR, AT, ES, IE, DK, SE, LT, NO, NL.
DE, SI: Estimate.
CH: data for USP with house service; data without courier and express service providers.
CZ: Confidential.
EL, PT: data for USP and authorised/licensed postal service providers.

[4] Postal establishments are the establishments open to the public where customers may apply for postal services. These postal establishments may be owned and staffed by the postal service provider, may be owned by the postal service provider and staffed by persons from outside the postal service provider, may be owned by 3rd entities and provide postal services of the postal service provider under a contract (for example a postal establishment usually named agency), may be permanent (fixed) or a mobile establishment (for example set up in a road transport vehicle). Also includes delivery personal providing services similar to the counter services. It does not include other access points as letter boxes, or similar, where customers exclusively deposit the postal items. It also doesn't include points where only stamps, or similar, are sold.

Figure 29 – Postal density (Number of inhabitants per postal establishment)



	LU	SE	NO	CH	DE	BG	HU	PL	LV	SK	EE	RO	IE	EL	HR
2008	989	1425	1502	2023	2437	2342	3081	3830	3117	3265	2968	2369	3101	2720	3617
2009	1035	1466	1528	1991	2050	1953	3043	3542	3474	3222	3067	2515	3156	2657	3614
2010	1048	1468	1554	1996	1864	1880	3013	3503	3485	3210	3010	2722	3314	3527	3579
2011		1462	1611	1711	1822	1840	2855	2997	3021	3224	3228	3266	3369	3372	3452

	SI	FR	LT	PT	AT	RS	FY	ES	UK	FI	MT	CY	DK	NL	BE
2008	3407	3762	3529	3524	5627		5573	4562	5137	4542	6893	6746	6451	7750	7896
2009	3504	3762	3807	3518	5063		5122	4654	5191	4816	5506	6586	6596	7696	7664
2010	3523	3762	3818	3518	4562	4732	3187	4711	5264	4865	5286	6606	6797	7559	7776
2011	3559	3762	3804	3963	4490	4714	4864	5077		5559	5568	6460	6906	7548	8012

Notes:

LU, BG, RO, SK, SI, ES, FY, CY, FI: Calculations by ERGP, based on the answers from NRAs and population of country for the years 2008-2011 (source: Eurostat).

Only USP: UK, BE, FR, SI, AT, ES, IE, DK, SE, LT, NO, NL.

DE, SI: Estimate.

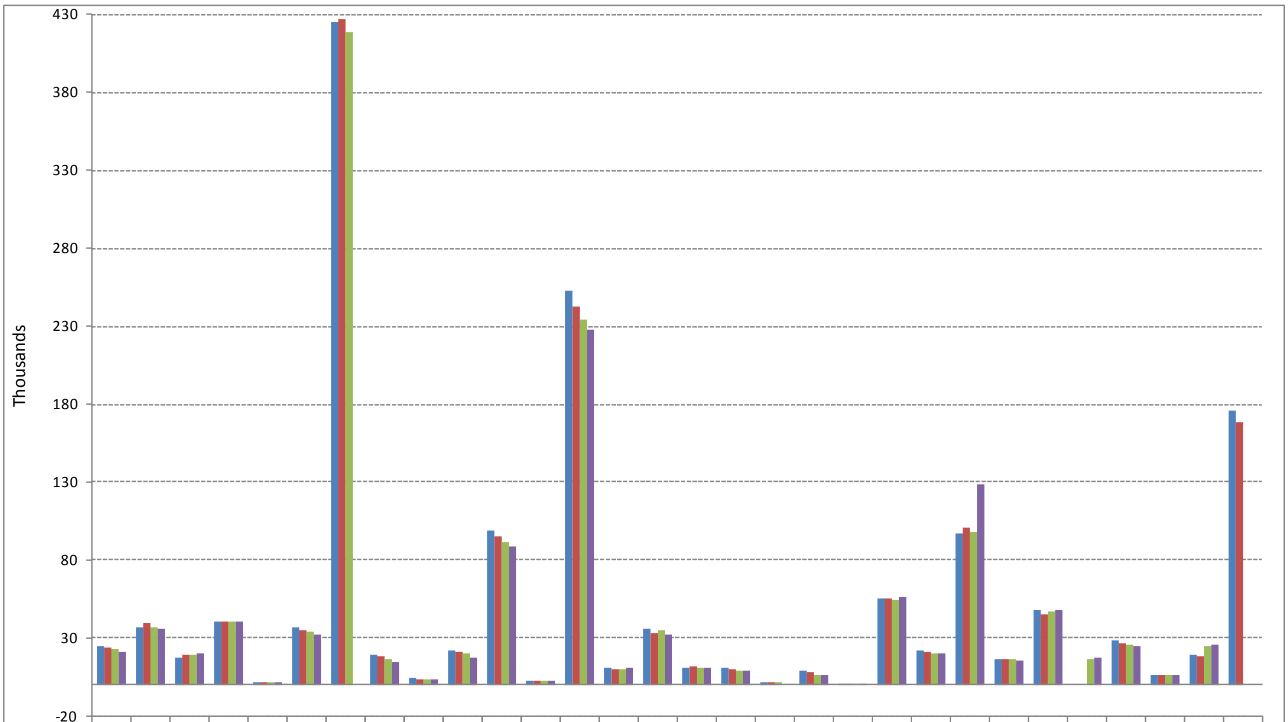
CH: data for USP with house service; data without courier and express service providers.

CZ: Confidential.

EL, PT: data for USP and authorised/licensed postal service providers.

6- Sector's employment

Figure 30 – Numbers of persons employed



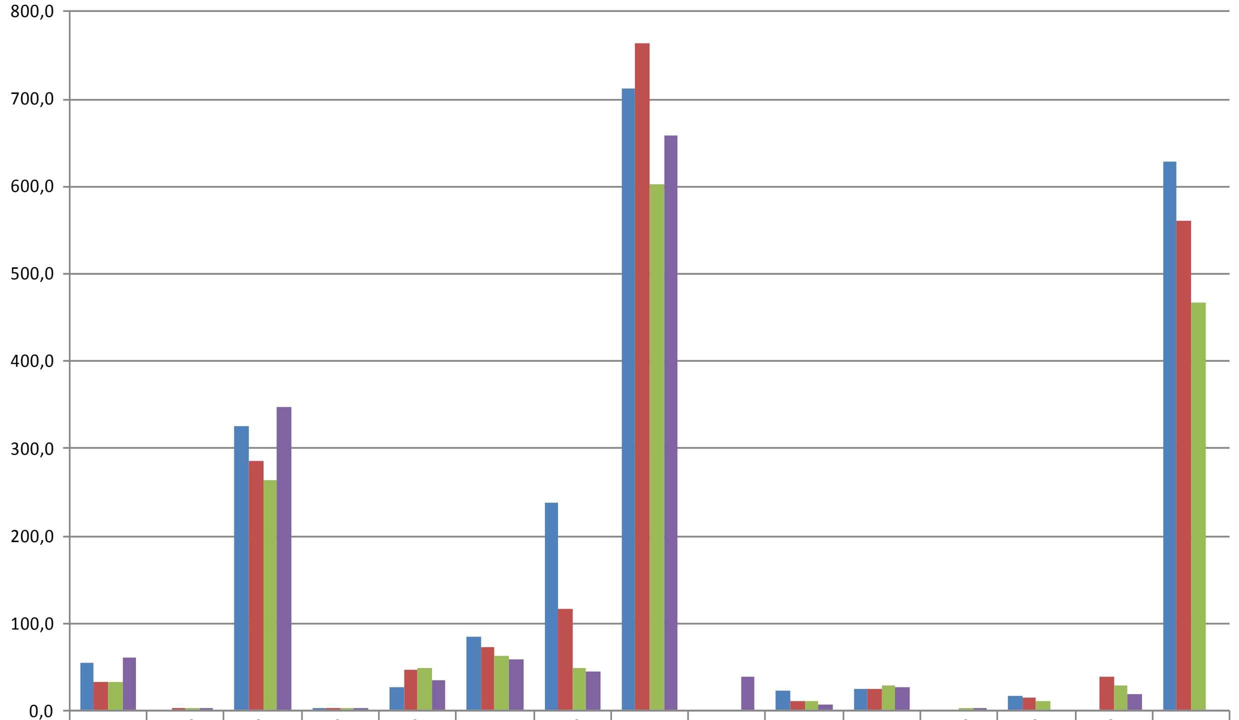
	AT	BE	BG	CH	CY	CZ	DE	DK	EE	EL	ES	FY	FR	HR	HU
2008	24,7	36,4	16,9	40,5	1,1	36,3	425,0	19,5	4,0	22,2	98,6	2,5	253,0	10,8	36,1
2009	23,6	39,3	19,4	40,4	1,2	34,9	427,0	18,0	3,6	21,1	95,0	2,5	243,0	10,2	33,0
2010	22,5	36,8	19,2	40,7	1,2	34,2	419,0	16,2	3,3	19,7	91,2	2,4	234,0	10,1	35,2
2011	21,4	35,9	19,9	40,8	1,3	32,6		14,7	3,3	17,1	88,2	2,7	228,0	10,5	31,9

	IE	LT	LU	LV	MT	NL	NO	PL	PT	RO	RS	SE	SI	SK	UK
2008	11,2	10,4	1,8	9,0	0,8	55,6	22,2	96,9	16,7	47,5		28,8	6,5	18,7	176,0
2009	11,3	9,9	1,8	7,6	0,8	55,2	20,6	100,7	16,5	45,0		26,7	6,4	18,4	168,0
2010	11,3	9,3	1,7	6,0	0,8	54,3	19,9	97,7	16,3	47,2	16,7	25,8	6,2	24,8	
2011	11,1	8,8	0,0	5,8	0,8	56,3	19,6	128,9	15,8	48,1	17,0	24,7	6,0	25,3	

Notes:
Only USP: AT, CZ, DK, IE, NL, NO, UK.
DE: Estimate.
UK (2010): Confidential.
Not available: FI.
CH: data for USP Group; data for non-USPs without courier and express service providers.
MT: Figures for non-USP reflect full-time equivalent.
EL, PT: USP and licensed/authorised postal service providers.
ES: data for the registered companies; data does not include consolidators.

7- Investment in the postal sector

Figure 31 – Investment in the postal sector (millions of euros)



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

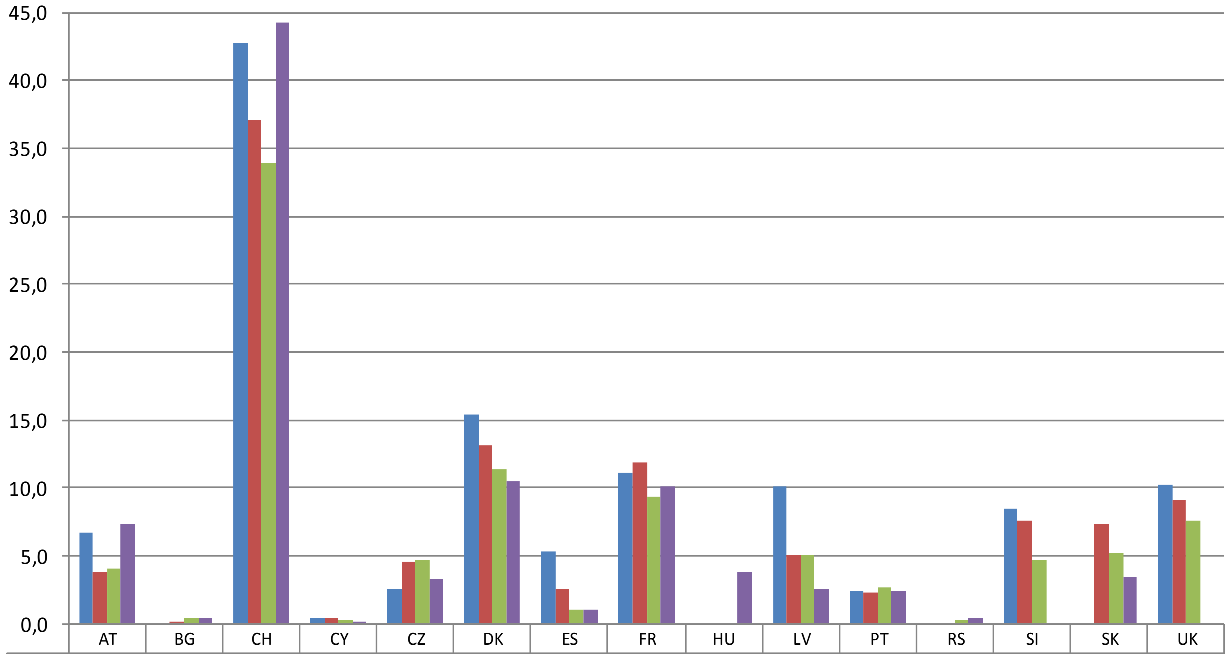
Notes:

Only USP: AT, CH, ES, SI, UK. Only Non-USP: BG.

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).

For countries not using the Euro as national currency, variations in (Euro) price may result from variations of the exchange rate.

Figure 32 – Investment per capita (euros)



	AT	BG	CH	CY	CZ	DK	ES	FR	HU	LV	PT	RS	SI	SK	UK
2008	6,6		42,8	0,4	2,6	15,4	5,3	11,1		10,0	2,4		8,5		10,3
2009	3,8	0,1	37,1	0,3	4,5	13,2	2,5	11,9		5,0	2,3		7,6	7,3	9,1
2010	4,0	0,3	33,9	0,2	4,6	11,3	1,1	9,3		5,0	2,7	0,3	4,7	5,2	7,5
2011	7,3	0,4	44,2	0,1	3,3	10,4	1,0	10,1	3,8	2,5	2,4	0,4		3,4	

Notes:
Only USP: AT, CH, ES, SI, UK. Only Non-USP: BG.
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).
For countries not using the Euro as national currency, variations in (Euro) price may result from variations of the exchange rate.

8- Customer satisfaction

18 out of 31 NRAs (58%) responded to the questions on Customer Satisfaction with 13 of the 18 (72%), indicating postal service providers having complaint handling procedures in place.

In relation to the publication of Quality of Service performance figures, 14 out of 31 (45%) indicated they publish Quality of Service performance figures with 11 NRAs (79%) indicating this was in respect of the USP only.

Out of the 31 NRAs, 13 (42%) indicated that postal service providers have compensation (redress) schemes in place for individual customers with two NRAs stating that this was in respect of the USP only.

However, the number of NRAs who responded to the specific question concerning escalation process for resolving consumer complaints by postal service providers (18 out of 31 NRAs (58%)) identified that only 7 NRAs (23%) have postal service providers with escalation procedures in place which consumers can take advantage in order to resolve their complaints

Conclusion:

- it is important that indicators used to continuously monitor the effects of postal liberalization, such as Quality of Service, are also supported by effective measures to monitor consumer satisfaction, so that NRAs are able to meet their regulatory obligations in terms of ensuring the provision of a universal service that can evolve to and better meet the needs of consumers of postal products and services. Ensuring consumers have access to effective complaint handling and redress procedures when the service they pay for falls short of intended outcomes, is a key enabler in promoting consumer confidence in the postal services they use;
- the responses received from NRAs relating to consumer protection measures indicate that just over half of all NRAs have complaint handling procedures in place and just below half publish Quality of Service figures and in the main publication is restricted to the USP only;
- In addition, the number of NRAs that have postal service providers providing an escalation process for resolving consumer complaints is notably low;
- This presents a significant opportunity for NRAs and postal service providers to improve the situation for consumers in order to ensure that they not only have access to complaint handling procedures, but are also able to seek appropriate redress for any failure in Quality of Service. In such a case the consumers can reasonably expect to receive fair and reasonable compensation

for purchased products and services provided by a postal service provider in a liberalized postal market.