



**ERGP REPORT ON THE QUALITY OF SERVICE,
CONSUMER PROTECTION AND COMPLAINT HANDLING
– AN ANALYSIS OF TRENDS**



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1. Executive summary

A. Background

According to Chapter 6 of Postal Directive, national regulatory authorities (NRAs) shall ensure compliance with the obligations arising from the aforementioned Directive, in particular through the follow-up of quality of service.

Quality-of-service standards regarding the universal service (US) are established in order to guarantee a postal service of good quality. These quality standards should in particular focus on routing times, as well as on the regularity and reliability of services.

The ERGP continuously monitors the effects of postal liberalisation through appropriate indicators by benchmarking the quality of postal services and their development over time, including end-user complaint procedures to ensure that consumers are protected according to the provisions of the Directive.

This document aims at:

- a) reporting on the core quality of service indicators to monitor market development, evaluating the results of regulatory measures and the consumer protection measures taken especially in the field of complaint handling;
- b) reporting on the core indicators to monitor complaint handling and consumer protection.

B. Methodology

The report is based on the 33 replies received from the ERGP members to a questionnaire requesting data for 2014 on quality of service and end-user satisfaction, including complaint handling and consumer protection.

C. Current situation regarding quality of service and end-user satisfaction

The quality of service and the end-user satisfaction have been analysed taking into consideration the following five dimensions:

1. Measurement of the quality of service concerning routing times and the regularity and reliability of services

All 33 ERGP members have regulatory objectives for routing times (100% of the respondents). Only 3 countries (9%) have regulatory objectives regarding queuing time in post offices and 7 countries (21%) regarding lost items or substantial delay.

In 2014, 32 countries established targets for measuring the transit time of end-to-end priority mail in the domestic postal market. There is a wide range of targets across the ERGP countries reflecting different national considerations and, as such, comparisons between ERGP countries cannot be drawn directly.



In 2014, the average value of results (D+1) in countries which provided information on the results (29 countries) was 89,3%, which is higher than in the previous year (87.6% for 27 countries). The universal service provider (USP) achieved the targets regarding D +1 in 22 countries, while in 6 countries the universal service provider (USP) did not.

2. Collection and delivery

Regarding the frequency of collection and delivery to be carried out by the USP, the responses received revealed that the Directive has been implemented by all ERGP Members which have established at least one collection/delivery for 5 days a week (in some countries the obligations have been extended to 6 days per week).

Nonetheless, many countries have granted exceptions regarding frequency of collection and in particular delivery. Responses revealed that these exceptions are mainly related to mountain areas, dispersed population and islands.

3. Access points

The access point is rather a very sensitive issue and this is reflected by the fact that a vast majority of the countries deem it necessary to have requirements or standards to ensure an adequate number of collection letterboxes and points of contact/postal establishments.

There are different types of points of contact at the European level. The most common is the permanent post office managed by the USP with a full range of services and the permanent post agency managed by a third party.

4. Measurement of consumer satisfaction

According to the responses, 14 out of 31 NRAs (45%) use or monitor indicators of consumer satisfaction in their countries. The results from the 2015 questionnaire show that 9 USP's in Europe conduct studies regarding the level of consumer's satisfaction and publish the results.

5. Surveys regarding customer' needs

In terms of surveying consumer needs and market, 16 NRAs (48%) do conduct such surveys. The consumer needs surveys carried out by the USPs are, in most cases, not publicly available. These USP surveys are only published in Switzerland, Denmark and Slovenia.



D. Current situation regarding consumer protection and complaint handling

The report examines four key issues in the field of consumer protection and complaint handling, namely:

1. Competence of NRAs regarding complaint handling

In 26 (79%) out of the 33 countries, the NRA is generally responsible for dealing with user's complaints. In three of these countries (9%), the NRA only handles complaints with regard to the universal service, while in the majority of the countries (67%), all postal service issues can be addressed. Six (18%) NRAs stated that they are not obliged to handle user complaints.

2. Information provision and access to complaint handling and dispute resolution

There have been no major changes in the number of countries obliging the postal service providers to publish information. In most countries, USPs are generally obliged to publish information about complaint handling procedures and redress schemes, which was mentioned by 28 (85%) and 24 (73%) NRAs respectively. In 12 countries (36%), there is an obligation covering information on means of dispute resolution.

3. Compensation schemes for individual customers

Regarding the scope of existing compensation schemes, most countries (22 out of 32) have an obligation for a specific compensation scheme which concerns the USP. This also extends to other postal service providers in 15 countries.

4. Collection of data on complaints

Almost all NRAs collect data on complaints received by the USP regarding US (29 out of 33). Out of these, 22 indicated to collect data by category and 15 by service. Fewer NRAs also collect data on complaints received by the USP about non-universal services (16). Almost half of the NRAs (15 out of 33) indicate that they collect information on cross-border services complaints.



2. Background

Chapter 6 of Postal Directive 97/67/EC, as amended by Directives 2002/39 and 2008/6 (afterwards referred to as Directive in this report), lays down that the national regulatory authorities (NRAs) shall ensure compliance with the obligations arising from the Directive, in particular through the follow-up of quality of service.

The Directive emphasises that the postal reform has brought significant positive developments in the postal sector, increasing both quality of service and focus on meeting consumer needs. Increased competition allows consumers to take advantage of a wider choice of products and services offered by postal service providers and allows these products and services to be continually improved in order to meet consumer demand.

Quality-of-service standards regarding the universal service are established and published in order to guarantee a postal service of good quality. Quality standards have to focus, in particular, on routing times and on the regularity and reliability of services.

The ERGP continuously monitors the effects of postal liberalisation through appropriate indicators such as benchmarking the quality of postal services and their development over time, including end-user complaint procedures to ensure that consumers are protected in accordance with the provisions of the Directive.

The objective is to collect the necessary data to monitor quality of service, end-user satisfaction, consumer protection and complaint handling within the context of the regulatory measures taken in those fields.

The document aims at:

- a) reporting on the core quality of service indicators to monitor market development, evaluating the results of regulatory measures and the consumer protection measures taken especially in the field of complaint handling;
- b) reporting on the core indicators to monitor consumer protection and complaint handling.

The report looks at the current and past situation of data collection and publishes indicators regarding quality of service, consumer protection and complaint handling. It then analyses this data and identifies market trends regarding quality of service, quality of delivery, customer satisfaction and development of the postal network, as well as consumer protection and complaint handling. The report has been published yearly since 2011 and the objective is to update this report on an annual basis.



This ERGP report describes the current practices of NRAs concerning quality of service, consumer protection and complaint handling as well as the current scope, competencies and powers of NRAs.

The report examines five key issues in the field of quality of service and end-user satisfaction, namely:

1. measurement of quality of service concerning transit time;
2. collection and delivery;
3. access points;
4. measurement of consumer satisfaction;
5. surveys regarding customers' needs.

The report also examines four key issues in the field of consumer protection and complaint handling, namely:

1. competence of NRAs on complaint handling;
2. information provision and access to complaint handling and dispute resolution;
3. compensation schemes for individual customers;
4. collection of data on complaints.



3. Methodology

In order to gather information regarding quality of service and end-user satisfaction in the broad sense of the term, including information regarding complaint handling and consumer protection, a questionnaire was submitted in May 2015 to ERGP members and observer NRAs in order to collect information on the current situation.

We received 33 replies from the NRAs of the following countries: Austria, Belgium, Bulgaria, Croatia, Cyprus, the Czech Republic, Denmark, Estonia, Finland, France, the Former Yugoslavia Republic of Macedonia (FYROM), Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Norway, Poland, Portugal, Romania, Serbia, Slovak Republic, Slovenia, Spain, Sweden, Switzerland, the Netherlands and the United Kingdom.

The current report is primarily based on the answers provided to the questionnaire, which overall, reflects the legislation and practice in place at the end of 2014.

The data used in the report is already collected by NRAs and is publicly available data¹, which means that NRAs did not collect data specifically for this ERGP exercise.

For some indicators, we used data already used in previous ERGP reports (based on the NRAs' responses to the ERGP questionnaires, for the period from 2008 to 2014).

With the objective of identifying geographical trends and to present the information in a more appealing way, for some indicators a cluster analysis was made using the following clusters²:

- Western countries: AT, BE, DE, DK, FI, FR, IE, LU, NL, SE, UK;
- Southern countries: CY, EL, ES, IT, MT, PT;
- Eastern countries: BG, CZ, EE, HR, HU, LT, LV, PL, RO, SI, SK;
- Countries outside the European Union (EU): CH, FY, IS, NO, RS.

¹ Only public data was included in the report, confidential figures are not presented individually.

² Classification also used in some of the postal studies commissioned by the European Commission.



4. Current situation regarding quality of service and end-user satisfaction

The quality of service and the end-user satisfaction have been analysed based on the following five dimensions:

1. measurement of the quality of service concerning transit time and the regularity and reliability of services;
2. collection and delivery;
3. access points;
4. measurement of consumer satisfaction;
5. surveys regarding customer needs.

Other elements could also be used to monitor quality of service and end-user satisfaction, but in this report the scope has been limited to the abovementioned dimensions.

We have also referred to the technical standards developed by CEN (European Committee for Standardisation) in the field of quality of service, as laid down in Article 20 of the Directive.

4.1. Measurement of quality of service concerning routing times and the regularity and reliability of services

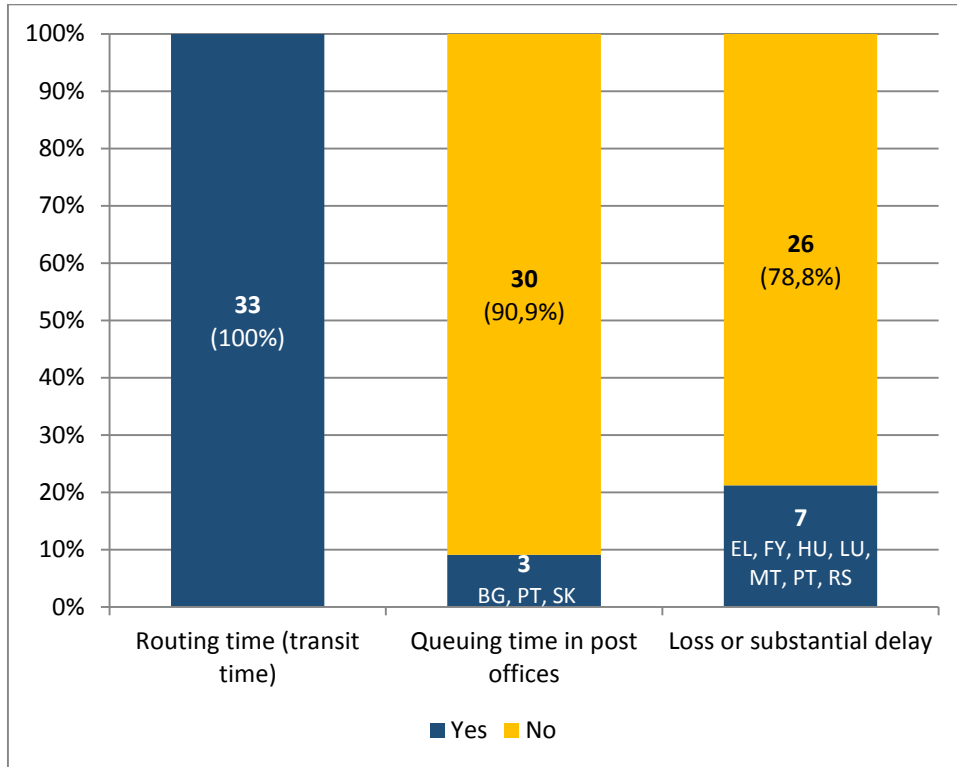
In accordance with the postal Directive 97/67/EC (especially Chapters 6 & 7 and Annex 2), one of the main tasks of the NRAs is to monitor the quality of service in order to guarantee a postal service of good quality. Quality of service standards have to be set and published in relation to the universal service in order to guarantee a postal service of good quality and have to focus, in particular, on routing times and on the regularity and reliability of services³.

³ Article 16 Directive 97/67/EC "Member States shall ensure that quality-of-service standards are set and published in relation to universal service in order to guarantee a postal service of good quality. Quality standards shall focus, in particular, on routing times and on the regularity and reliability of services. [...] Independent performance monitoring shall be carried out at least once a year by external bodies having no links with the universal service providers under standardised conditions to be specified in accordance with the procedure laid down in Article 21 and shall be the subject of reports published at least once a year."



Figure 1 gives details regarding the definition of regulatory objectives for routing time (transit time), queuing time in post offices and loss or substantial delay.

Figure 1 – Regulatory objectives



All countries define regulatory objectives which deal with universal services regarding routing time. Only 3 countries (9%) have regulatory objectives regarding queuing time in post offices and 7 countries (21%) regarding loss or substantial delay⁴.

According to figure 2 below, in 2014, 32 ERGP members had regulatory objectives for priority mail, considering that AT, ES, RS and SI did not differentiate between priority and non-priority mail. Amongst 33 countries, 22 (67%) had regulatory objectives for parcels, 11 countries (33%) for registered items, 5 countries (15%) for bulk mail and 2 countries for newspapers/periodicals (6%).

⁴ Figure 9 - Regulatory objectives for loss or substantial delay in 2014



Figure 2 – Regulatory objectives for transit time – which kind of service has a regulatory objective

	Priority mail	Non-priority mail	Registered items	Bulk mail	Newspapers / periodicals	Parcels
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	✓	✓	✓	-	-	✓
Total 33	32	17	11	5	2	22

Notes:

AT, ES, RS and SI did not differentiate between priority and non-priority mail.

Non-priority mail is not applicable in CY, CZ, DE, EE, IE, IT, MT, NL.

AT: there are no specific targets and measurements for registered mail, there are regulatory objectives for letters in general and the results are analysed together for all kinds of letters.

ES measures transit time of bulk mail and single piece priority mail together.

HU: newspapers/periodicals are not a separate item category inside the letter-post items.

LU: regarding the general term of "postal item (up to 50 g)", there is no differentiation between priority and non-priority mail, registered items and/or bulk mail.

SE: there is no differentiation between single piece and bulk priority mail (same regulatory objectives).



Out of the 33 countries, 20 (61%) provide non-priority single piece mail, considering that, in 8 countries, non-priority single piece mail is not applicable and, in 5 countries, there is no differentiation with priority mail. Amongst these 20 countries, 17 set regulatory objectives for non-priority mail in 2014.

Figure 3 below details if countries set regulatory objectives for cross-border services and if they had the results of quality of service concerning cross-border flows.

Figure 3 – Cross-border information per country

	Regulatory objectives regarding cross-border services	Results regarding cross-border flows?
Austria	Yes	Yes
Belgium	Yes	Yes
Bulgaria	Yes	Yes
Croatia	Yes	Yes
Cyprus	Yes	Yes
Czech Republic	No	Yes
Denmark	No	No
Estonia	No	Yes
Finland	No	No
FYROM	Yes	No
France	Yes	Yes
Germany	Yes	No ⁵
Greece	Yes	Yes
Hungary	Yes	Yes
Iceland	Yes	No
Ireland	Yes	Yes ⁶
Italy	Yes	Yes
Latvia	No	Yes
Lithuania	Yes	Yes
Luxembourg	Yes	Yes
Malta	Yes	Yes
Netherlands	No	No
Norway	Yes	Yes
Poland	No	No
Portugal	Yes	Yes
Romania	Yes	Yes
Serbia	Yes	Yes
Slovakia	No	No
Slovenia	Yes	Yes
Spain	Yes	Yes
Sweden	No	Yes ⁷
Switzerland	Yes	Yes
United Kingdom	Yes	Yes
Total of "yes"	24	25

⁵ Until 2013 cross-border mail transit times were measured by IPC for Deutsche Post who used to transmit the results to BNetzA. Negotiations to restart these measurements are in progress.

⁶ IE: While cross-border objectives have been set by national legislation, the results regarding cross-border flows are those monitored by IPC and published on its website and are not within the control of the NRA.

⁷ Confidential data.



In 2014, 24 out of the 33 ERGP countries (73%) set regulatory objectives for cross-border services, but 3 of them did not have the corresponding results.

Furthermore, also in 2014, 21 countries established an objective regarding D+3 and amongst them, 19 countries also had an objective regarding D+5 delivery. Belgium set a target for incoming cross-border mail regarding D+1 delivery as well.

Regarding D+3, 19 countries set their target value at 85%⁸, while France set its target at 90% and Portugal at 88%. Concerning D+5 delivery, these 19 countries established their target at 97%.

Out of the 33 countries, only 25 (76%) presented the results of transit time of cross-border flows for 2014. Seven countries indicated that the information source is the USP, 12 countries that it is IPC and 6 countries explained that the information is communicated by the USP but based on the data provided by IPC.

4.1.1. Measurement of quality of service for single piece priority mail in 2014

In 2014, 32 countries set targets for measuring the transit time of end-to-end priority mail in the domestic postal market.

There is a wide range of targets across the ERGP countries reflecting different national considerations and, as such, comparisons between ERGP countries cannot be drawn.

Figure 4 – Targets and results of single piece priority mail in 2014

	D+1		D+2		D+3		D+4		D+5	
	Target	Result	Target	Result	Target	Result	Target	Result	Target	Result
AT	95,00	n.a	98,00	n.a	-	-	100,00	n.a	-	-
BE	93,00	94,73	97,00	98,92	-	99,64	-	-	-	-
BG	80,00	67,20	95,00	90,30	-	-	-	-	-	-
CH	97,00	97,70	-	-	-	-	-	-	-	-
CY	90,00	87,50	-	97,00	97,00	98,90	-	-	-	-
CZ	92,00	93,89	-	-	-	-	-	-	-	-
DE ⁹	80,00	90,90	95,00	98,90	-	-	-	-	-	-
DK	93,00	94,80	-	-	-	-	-	-	-	-
EE	90,00	88,50	-	-	-	-	-	-	-	-
EL	87,00	87,30	-	-	98,00	99,60	-	-	-	-
ES ¹⁰	-	-	-	-	93,00	95,45	-	-	99,00	98,84

⁸ Austria set a target at 85 % for cross-border intra-Community priority mail and postal parcels but set also a target at 90 % for cross-border extra-Community priority mail and postal parcels.

⁹ In Germany there is no separation between single piece priority mail, registered mail and bulk mail: the results of quality of service presented in this table include bulk mail and registered mail

¹⁰ In Spain, as in Germany, there is no separation between single piece priority mail and bulk mail: the results of quality of service presented in this table include those of bulk mail



	D+1		D+2		D+3		D+4		D+5	
	Target	Result	Target	Result	Target	Result	Target	Result	Target	Result
FI	80,00	91,00	-	-	-	-	-	-	-	-
FR	>85,00	86,70	-	97,50	99,00	99,20	-	-	-	-
HR	85,00	87,60	95,00	97,90	-	-	-	-	-	-
HU	90,00	90,10	-	-	97,00	99,70	-	-	-	-
IE	94,00	90,00	-	-	99,50	99,10	-	-	-	-
IS	85,00	89,00	-	-	-	-	-	-	-	-
IT	89,00	90,50	-	-	98,00	99,30	-	-	-	-
LT	85,00	85,40	-	-	97,00	98,40	-	-	-	-
LU ¹¹	-	96,93	85,00	99,78	99,00	99,95	n.a.	n.a.	-	-
LV	90,00	90,80	-	-	-	-	-	-	-	-
MT	94,00	94,01	98,00	98,65	99,00	99,19	-	-	-	-
NL	95,00	96,70	-	-	-	-	-	-	-	-
NO	85,00	85,50	-	-	97,00	99,50	-	-	-	-
PL	82,00	65,40	90,00	91,20	94,00	97,30	-	-	-	-
PT ¹²	94,50	95,30	87,00	93,30	-	-	-	-	-	-
RO	85,00	-	97,00	-	-	-	-	-	-	-
RS	80,00	71,81	90,00	93,63	95,00	99,14	-	-	99,50	100
SE	85,00	93,20	-	-	97,00	99,80	-	-	-	-
SI ¹³	95,00	97,30	99,50	99,50	100,00	99,90	-	-	-	-
SK	93,00	96,38	99,00	99,72	-	-	-	-	-	-
UK	93,00	92,90	-	-	98,5	99	-	-	-	-
Total	30	29	13	13	16	17	1	0	2	2
Average	88,7	89,3	94,3	96,6	97,4	99,0	100	-	99,3	99,4

Figure 4 above shows the countries that established targets from D+1 to D+5 delivery for single piece priority mail, and their results for 2014. Based on this table, we can conclude that:

- 30 countries set a target for D+1 delivery, out of which Bulgaria (80%), Finland (80%), Germany (80%) Serbia (80%) and Poland (82%) had the lowest targets, while 7 countries set their target at 85 % and 16 countries at 90 % or more. 29 countries provided the results for 2014 and the average value of the results was 89,3%, which is higher than the previous year (87,6%);
- 13 countries established a target for D+2 delivery, ranging from 85% (Luxembourg) to 99,5% (Slovenia);
- 16 countries established a target for D+3 delivery;
- only Austria set a target (100%) for D+4 and only Serbia (99,5%) and Spain (99%) set targets for D+5.

¹¹ In Luxembourg, regarding the general term of “postal item (up to 50 g)”, there’s no differentiation between priority and non-priority mail, registered items and/or bulk mail.

¹² D+1 applies to letters sent between any location of Portugal’s mainland and D+2 applies to letters sent from, between or to any location of the Autonomous Regions of Azores and Madeira.

¹³ SI doesn’t differentiate between priority and non-priority mail. SI measurement for D+1, D+2 and D+3 is done for items of correspondence which compared to the definition of single piece priority mail, includes a broader range of services.



Figure 5 – Targets (2014) and results (2013 and 2014) regarding D+1 delivery of single piece priority mail¹⁴

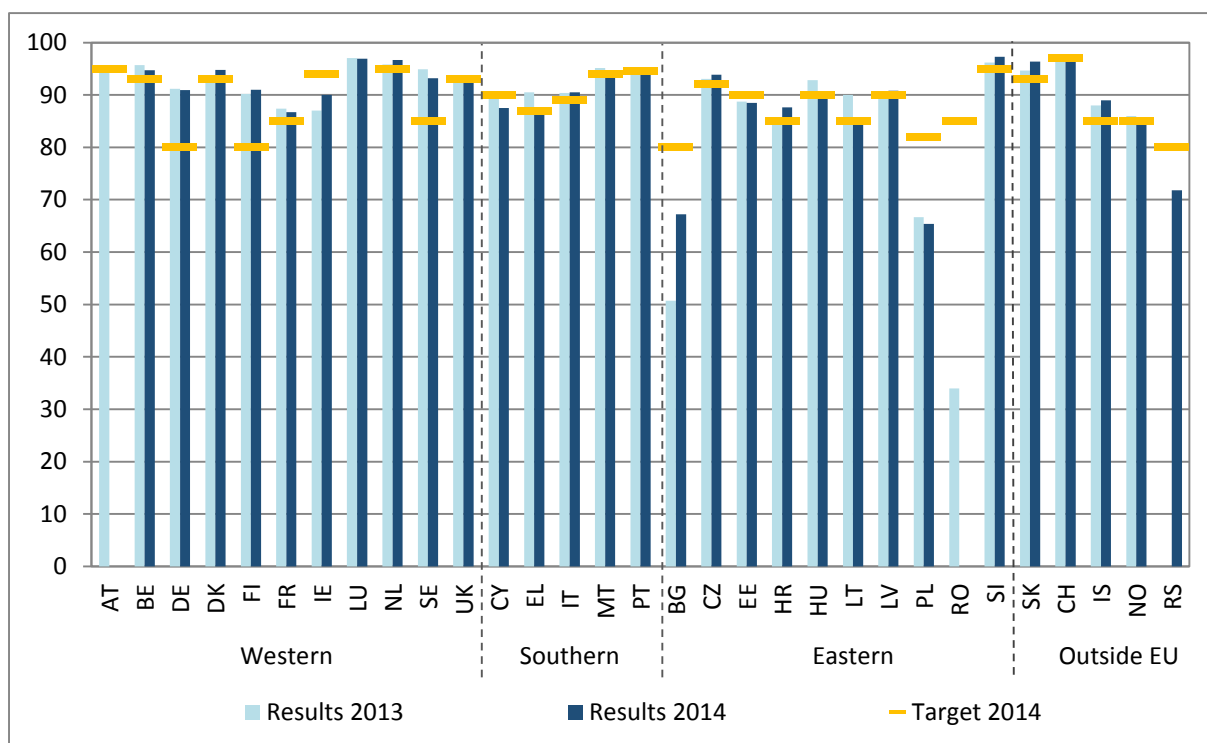


Figure 5 shows that, in 2014, 22 out of the 28 countries which provided their targets and results (D+1), achieved their target regarding D+1 delivery, while 6 countries did not. Amongst the 28 countries which provided their results for 2013 and 2014 (D+1), 14 recorded a progress in transit time quality, while 14 did not (but for 5 of them, the quality was just slightly lower).

Regarding the **measurement methodology**, in 2014, 28 countries used the European standard EN 13850¹⁵ for the measurement of single piece priority mail transit time¹⁶.

In measuring the transit time, some events – which have been considered as **force majeure** regarding the European standard EN 13850 – can be excluded from the measurement, with potential impact on quality of service. In accordance with EN 13850, in most countries (18¹⁷), the NRA decides on the application of force majeure events on request of the operator, but the concept of force majeure has been defined in line with the standard in only 11 countries.

In 2014, the number of days of force majeure accepted by the NRAs varied between 0 and 7¹⁸ whereas, in 2013, it ranged between 0 and 15 days.

¹⁴ ES, LU: no target regarding D+1 delivery for priority mail in 2014

FY: no regulatory objective for priority mail

RO: no measurement of quality of service for priority mail in 2014.

¹⁵ EN 13850 is a CEN standard for Postal Services – Quality of Services – Measurement of the transit time for single piece priority mail and first class mail

¹⁶ See annex 1

¹⁷ BE, BG, CH, CY, DK, EL, ES, FI, FY, HR, HU, IE, LU, MT, PL, PT, RS, SK.

¹⁸ See annex 2



4.1.2. Measurement of quality of service for single piece non-priority mail in 2014

Figure 6 below presents the countries which had a regulatory objective for routing time of single piece non-priority mail in 2014¹⁹.

Figure 6 – Targets and results of single piece non-priority mail in 2014

	D+1		D+2		D+3		D+4		D+5		D+6	
	Target	Result	Target	Result	Target	Result	Target	Result	Target	Result	Target	Result
BE	-	80,14	95,00	97,18	97,00	99,35	-	99,70	-	99,85	-	99,90
BG	-	-	80,00	87,30	95,00	94,80	-	-	-	-	-	-
CH	-	-	-	-	97,00	99,00	-	-	-	-	-	-
DK	-	-	-	-	-	-	93,00	99,00	-	-	-	-
FI	-	-	95,00	97,40	98,00	99,00	-	-	-	-	-	-
FR	-	-	94,00	93,20	-	-	99,00	99,50	-	-	-	-
FY	85,00	-	90,00	-	95,00	-	-	-	-	-	-	-
HR	-	-	-	-	95,00	97,30	-	-	-	-	-	-
HU	-	-	-	-	85,00	86,50	-	-	97,00	98,50	-	-
IS	-	-	-	-	85,00	97,00	-	-	-	-	-	-
LU ²⁰	n.a.	96,93	85,00	99,78	99,00	99,95	n.a.	n.a.	-	-	-	-
LT	-	-	85,00	86,70	-	-	97,00	97,80	-	-	-	-
LV	-	-	-	-	98,00	99,40	-	-	-	-	-	-
NO	-	-	-	-	-	-	85,00	96,30	-	-	97,00	99,70
PL	-	-	-	-	85,00	81,60	-	-	97,00	97,30	-	-
PT	-	-	-	-	96,30	97,60	-	-	-	-	-	-
SI ²¹	95,00	97,30	99,50	99,50	100,00	99,90	-	-	-	-	-	-
SK	-	-	93,00	93,02	-	-	99,00	99,86	-	-	-	-
UK	-	-	-	-	98,50	98,99	-	-	-	-	-	-
Total	2	3	9	8	14	13	5	6	2	3	1	2
Average	90,0	91,5	90,2	94,3	94,6	96,2	97,0	98,7	97,0	98,6	97,0	99,8

Based on this table we can conclude that, in 2014, most countries had a target regarding D+3 (14). Hungary, Iceland and Poland (85%) had the lowest targets while Luxembourg (99%), Slovenia (100%) and the United Kingdom (98.5%) had the highest ones.

Only 2 countries set a target regarding D+1 delivery, whereas 9 countries had a target regarding D+2 delivery. Five countries set targets for D+4. Hungary and Poland (both 97%) set a target for D+5 delivery. Only Norway set targets for D+6 (97%).

¹⁹ See table 1

²⁰ In Luxembourg, regarding the general term of "postal item (up to 50 g)", there's no differentiation between priority and non-priority mail, registered items and/or bulk mail.

²¹ SI doesn't differentiate between priority and non-priority mail. SI measurement for D+1, D+2 and D+3 is done for items of correspondence which compared to the definition of single piece priority mail, includes a broader range of services.



Concerning the methodology, 9 countries used the European standard EN 14508²² for the measurement of single piece non-priority mail and 5 countries used the EN 13850²³.

4.1.3. Measurement of quality of service for registered mail in 2014

Figure 7 below presents the countries which had a regulatory objective for registered mail in 2014.

Figure 7 – Targets and results of registered mail in 2014

	D+1		D+2		D+3		D+4		D+5	
	Target	Result	Target	Result	Target	Result	Target	Result	Target	Result
AT	-	-	-	-	-	-	-	-	-	-
BE	95,00	96,10	97,00	99,60	-	99,90	-	99,90	-	100,00
DE ²⁴	80,00	90,90	95,00	98,90	-	-	-	-	-	-
FR	-	-	94,00	94,60	-	-	-	-	-	-
HU ²⁵	-	-	-	-	85,00	97,40	-	-	97,00	99,60
IT	-	-	-	-	92,50	94,30	-	-	98,00	98,40
LT	85,00	n.a.	-	-	97,00	n.a.	-	-	-	-
LU	n.a.	96,93	85,00	99,78	99,00	99,95	n.a.	n.a.	-	-
MT	98,00	99,06	99,00	99,89	99,00	99,95	-	-	-	-
SK	-	-	93,00	94,72	-	-	99,00	99,91	-	-
UK	99,00	98,70	-	-	-	-	-	-	-	-
Total	5	5	6	6	5	5	1	2	2	3
Average	91,4	96,4	93,8	97,9	94,5	98,3	99,0	99,9	97,5	99,3

Based on this table we can conclude that:

- Only Belgium (95%), Germany (80%), Lithuania (85%), Malta (98%) and the United Kingdom (93%) set a quality target regarding D+1 delivery.
- Regarding D+2 delivery, 6 countries set quality targets (BE, DE, FR, LU, MT, SK) from 85% for the lowest (LU) to 99% for the highest one (MT).
- Six countries set targets for D+3, 1 country for D+4 and 2 countries for D+5.
- All the countries that provided their results surpassed their targets (Lithuania has not provided its results for 2014).

For the measurement of registered items' transit time, only 3 countries used the European standard EN 13850, whereas 3 respectively used EN 14137, EN 14508 and TR 15472, and 2 countries used another methodology²⁶.

²² EN 14508 is a CEN standard for Postal Services – Quality of Services – Measurement of the transit time for single piece non-priority mail and second class mail.

²³ See annex 1.

²⁴ In Germany there is no separation between single piece priority mail, registered mail and bulk mail: the results of quality of service presented in this table include registered mail and bulk mail.

²⁵ HU: these targets and results apply only for official document that is a special registered item category. Otherwise the targets for normal registered items are the same as non-registered items but these are not measured.

²⁶ See annex 1.



4.1.4. Measurement of quality of service for parcels in 2014

Figure 8 below presents the countries which had a regulatory objective for routing time for single piece parcels in 2014.

Figure 8 – Targets and results of single piece parcels in 2014

	D+1		D+2		D+3		D+4		D+5		D+6	
	Target	Result	Target	Result	Target	Result	Target	Result	Target	Result	Target	Result
AT	-	-	90,00	n.a	-	-	-	-	100,00	n.a	-	-
BE	95,00	95,44 ²⁷	97,00	99,26 ²⁸	-	-	-	-	-	-	-	-
BG	80,00	92,60	95,00	99,80	-	-	-	-	-	-	-	-
CH	95,00	97,40	95,00	97,50	-	-	-	-	-	-	-	-
DE	-	-	80,00	-	-	-	-	-	-	-	-	-
DK	93,00	97,70	-	-	-	-	-	-	-	-	-	-
ES ²⁹	-	-	-	-	80,00	80,09	-	-	95,00	88,32	-	-
FR	-	-	88,00	91,00	-	-	98,50	99,20	-	-	-	-
FY	-	-	70,00	-	75,00	-	-	-	80,00	-	-	-
HU ³⁰	-	-	85,00	98,60	95,00	99,80	-	-	-	-	-	-
IT	-	-	-	-	94,00	94,04	-	-	-	-	-	-
LT	-	-	-	-	-	-	97,00	n.a	-	-	-	-
LV	-	-	-	-	-	-	98,00	98,00	-	-	-	-
MT ³¹	98,00	98,72	99,00	99,74	99,00	99,86	-	-	-	-	-	-
NO	-	-	-	-	-	-	85,00	88,70	-	-	97,00	98,40
PL ³²	80,00	84,40	-	-	90,00	99,40	-	-	-	-	-	-
PT	-	-	-	-	92,00	94,30	-	-	-	-	-	-
RO	-	-	85,00	-	-	-	97,00	-	-	-	-	-
RS	85,00	-	95,00	-	99,00	-	-	-	-	-	-	-
SI	-	-	80,00	99,80	95,00	100,00	-	-	-	-	-	-
SK ³³	-	-	93,00	-	-	-	99,00	-	-	-	-	-
UK	93,00	92,90	-	-	98,50	98,90	-	-	-	-	-	-
Total	8	7	13	7	10	8	6	3	3	1	1	1
Average	89,9	94,2	88,6	98,0	91,8	95,8	95,8	95,3	91,7	88,3	97,0	98,4

Based on this table we can conclude that:

- For D+1 delivery, 8 countries set targets (BE, BG, CH, DK, MT, PL, RS, UK), from 80% for the lowest (BG, PL) to 98% for the highest (MT). All the countries that provided their results achieved their targets, with an average of 94,2% (Serbia has not provided its results for 2014).
- Regarding D+2 delivery, 13 countries set targets. Bulgaria, Switzerland, Serbia (95%), Belgium (97%), and Malta (99%) presented the highest targets, while the Former Yugoslav Republic of Macedonia (70%), Germany, Slovenia (80%) and Romania (85%) had the lowest ones. All the countries that provided their results exceeded their targets (98% on average).

²⁷ Parcels with delivery standard D+1.

²⁸ Parcels with delivery standard D+2.

²⁹ ES: For the measure of transit time of parcels, there is no differentiation between single piece and bulk parcels.

³⁰ HU: These targets and results apply for all US postal parcels. It is not known whether there are bulk parcels among them.

³¹ MT: There is no distinction between single piece parcels and bulk parcels

³² PL: The targets and results apply for priority and economic parcels.

³³ Measurement of delivery time for parcels is executed every three years.



- Concerning D+3 delivery, 10 countries set targets, 75% being the lowest (FY) and 99% the highest (MT, RS).
- Only 6 countries set a target for D+4 delivery (FR, LT, LV, NO, RO, SK), 3 countries for D+5 (AT, ES, FY) and only Norway set a target for D+6.

For the measurement of transit time of parcels, 4 countries used the European standard TR 15472³⁴, 3 countries used the standard EN 13850³⁵ and 6 countries used another methodology³⁶.

4.1.5. Additional information regarding quality of service in 2014

In addition to the measurement of transit time of the main postal services above (letters and parcels), some countries also used other types of indicators to monitor quality of service, such as the measurement of loss or substantial delay. Some countries also monitor transit times of bulk mail, newspapers and periodicals.

Regarding **loss or substantial delay**, 7 countries had regulatory objectives in 2014 (Figure 9).

Figure 9 – Regulatory objectives for loss or substantial delay in 2014

	Priority mail	Non-priority mail	Registered items	Bulk mail	Newspapers / periodicals	Parcels
EL	-	-	✓	-	-	✓
FY	-	✓	-	-	-	✓
HU	-	-	✓	-	-	-
LU	✓	✓	✓	✓	-	✓
MT	✓	-	-	✓	-	-
PT	✓	✓	-	-	-	-
RS	-	✓	✓	-	-	✓
Total	3	4	4	2	0	4

In 2014, Norway had no regulatory objective but rather a measurement of loss or substantial delay for single piece priority and non priority mail, registered items, bulk mail, newspapers/periodicals and parcels. Likewise, in Switzerland there was no regulatory objective but loss or substantial delay were measured by the USP for single piece priority and non priority mail and for parcels.

³⁴ TR 15472 is a CEN standard for Postal Services – Quality of Services – Measurement of the transit time for parcels by the use of a track and trace system.

³⁵ EN 13850 is a CEN standard for Postal Services – Quality of Services – Measurement of the transit time for single piece priority mail and first class mail.

³⁶ See annex 1.



In turn, also in 2014, only Hungary, Italy, Luxembourg and Malta had regulatory objectives for transit time of **bulk mail**. Spain measured transit time of bulk mail along with single piece priority mail, while France had a measurement of transit time of bulk mail but no regulatory objective. Regarding the methodology³⁷, France, Hungary and Malta used the European standard EN 14534³⁸.

Concerning **newspapers and periodicals**, only Portugal set regulatory objectives. In Malta, newspapers/periodicals are not measured separately but included in the single piece and/or bulk mail. France and Denmark had a measurement of transit time for newspapers/periodicals but without regulatory objectives.

³⁷ See annex 1

³⁸ EN 14534 is a CEN standard for Postal Services – Quality of Services – Measurement of the transit time for bulk mail.



4.2. Collection and delivery

4.2.1. Frequency of collections and deliveries

Regarding the frequency of collections and deliveries³⁹ made by the universal service provider (USP), the responses received revealed that the Directive has been implemented by all countries and, with few exceptions, the rule is at least one collection and delivery per day for 5 days a week.

The exceptions are those countries in which the obligation to carry out the collection and delivery by the USP was extended to 6 days a week. More specifically, the countries that have at least one collection and delivery per day for six days a week are mostly Western European countries, namely Denmark, France, Germany, the Netherlands (only for mourning mail and medical mail) and the United Kingdom and some countries outside the EU, namely Norway and Switzerland. In the southern European countries, only Malta has 6 days per week delivery and collection.

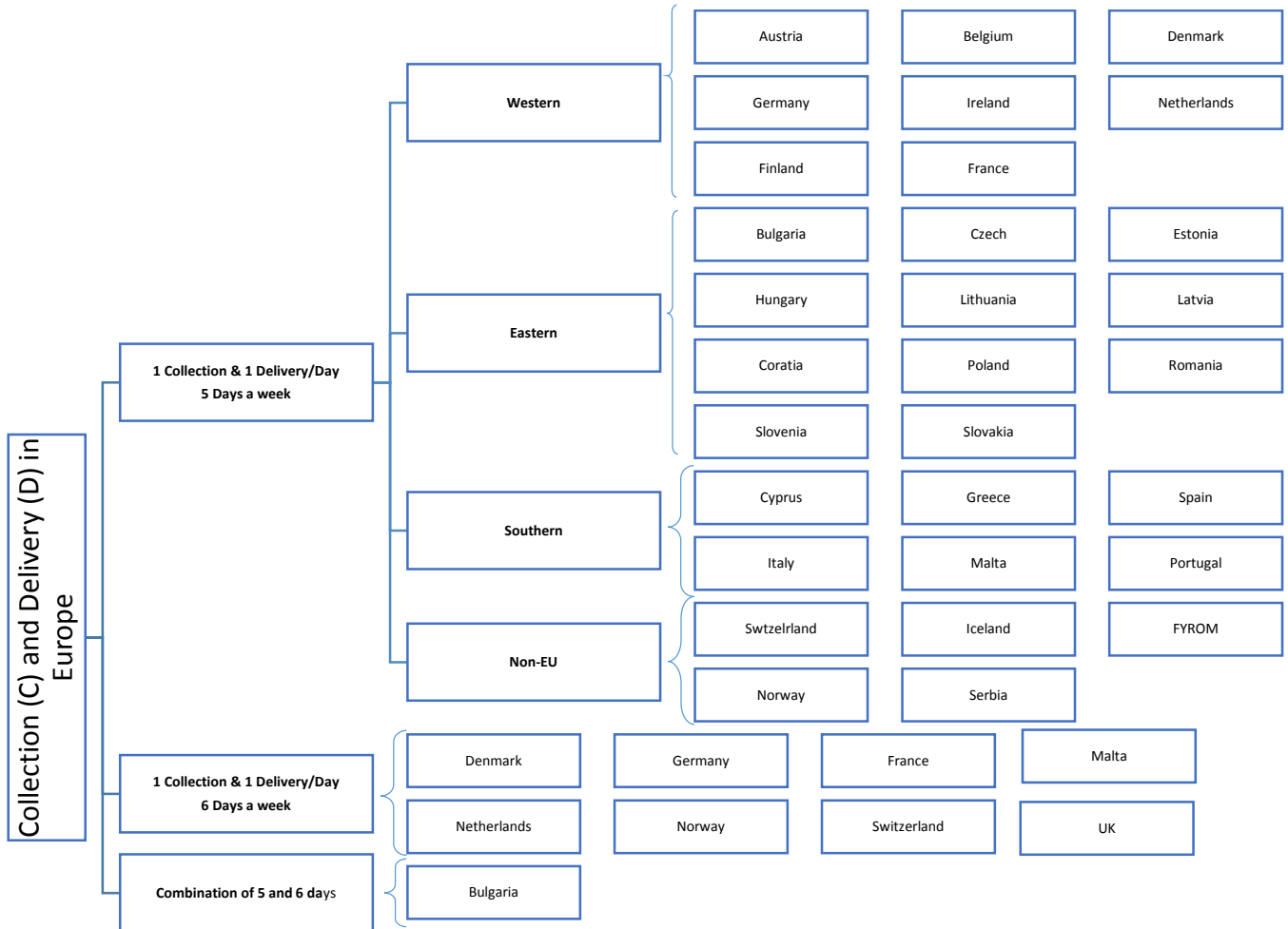
A special regime is applicable in Bulgaria⁴⁰, where the universal service provider is obliged to ensure the frequency of collection and deliveries differently throughout its national territory.

³⁹ Given the minor differences found between Member States in terms of frequency of collection and delivery for items of correspondence in the course of the 2014 report, the ERGP Working Group decided to simplify the text. Consequently, the three split categories (CNP – catalogues, newspapers and prints) in the 2014's Report (http://ec.europa.eu/internal_market/ergp/docs/documentation/2014/ergp-14-24-report-on-qos-and-end-user-satisfaction-version-of-27-november-final_en.pdf) are no longer marked distinctly in the current report.

⁴⁰ In Sofia, two collections/deliveries per day, from Monday to Friday, and one collection per day on Saturdays and Sundays and one delivery on Saturdays. For the rest of the country, the universal service provider has to ensure one collection/delivery per day, from Monday to Saturday, in the geographical area served by a sorting center, and one collection/delivery per day, from Monday to Friday, in the geographical area not served by a sorting center



Figure 10 – Frequency of collection and deliveries (5 days versus 6 days)



4.2.2. Exceptions to collection and delivery because of circumstances or geographical conditions deemed exceptional

According to Paragraph 3 of Article 3 of the Directive⁴¹, there may be exceptions in the frequency of collection/delivery in circumstances or geographical conditions deemed exceptional, which includes as a minimum: one clearance/one delivery to the home or premises of every natural or legal person or, by way of derogation, under conditions at the discretion of the national regulatory authorities, one delivery to appropriate installations. The directive underlines in the same paragraph that any

⁴¹ Article 3.3. “Member States shall take steps to ensure that the universal service is guaranteed not less than five working days a week, save in circumstances or geographical conditions deemed exceptional, and that it includes as a minimum:

- one clearance
- one delivery to the home or premises of every natural or legal person or by way of derogation, under conditions at the discretion of the national regulatory authority, one delivery to appropriate installations.

Any exception or derogation granted by a national regulatory authority in accordance with this paragraph must be communicated to the Commission and to all national regulatory authorities.



exception or derogation granted by a national regulatory authority must be communicated to the European Commission, as well as to all the other NRAs.

The most frequently mentioned reasons for the exceptions of USO obligations as described in detail in the countries are as follows:

- mountainous and inaccessible character;
- depopulated areas, dispersed population;
- insularity;
- costs⁴²;
- extreme weather conditions;
- areas where public transport is not regularly provided;
- poor infrastructure (roads etc.).

The country cases below are based on the situation in 2014. In 2015, AGCOM adopted a decision⁴³ for the implementation of an alternate day collection and delivery. The decision will enter into force as of October 2015.

4.2.3. Country cases⁴⁴

The country cases have been dealt within this report using the clusters as defined in the methodology⁴⁵.

A. Western states: Denmark, Finland, France, Ireland and UK

- **Denmark:** the Danish Transport and Construction Agency has stipulated in the Danish Postal Service Act of 2010 that the permanent inhabitants of a number of small Danish islands have to pick up their postal items (letters and parcels) at a central location on the mainland, receiving for this a compensation from the universal service provider.
- **Finland:** the reason for derogation is the islands' geographical character.
- **France:** the reason for derogation (mountain areas and islands' geographical territory) is determined on a case-by-case basis by the universal service provider and must be approved by the Ministry.
- **Ireland:** the universal service provider made an application to the NRA for derogations from the USO for certain working days which the NRA subsequently publically consulted on in September 2014.
- **UK:** the reasons for derogation are the costs of service, the mountain areas and islands, the insularity and the dispersed population.

⁴² The postal sector has the features of a scale economy in which the providers reduce the costs incurred by the processing of a single postal item as the real flow they process is increasing. Where the real flow is low, the processing costs increase and the operators naturally decide to close their access/contact points operated by personnel, ensuring most of the times (with the agreement of the regulatory authorities) the collection and delivery of postal items 2-3 times a week.

⁴³ http://www.agcom.it/documentazione/documento?p_p_auth=flw7zRht&p_p_id=101_INSTANCE_kidx9GUnlodu&p_p_lifecycle=0&p_p_col_id=column-1&p_p_col_count=1&_101_INSTANCE_kidx9GUnlodu_struts_action=%2Fasset_publisher%2Fview_content&_101_INSTANCE_kidx9GUnlodu_assetEntryId=2392029&_101_INSTANCE_kidx9GUnlodu_type=document

⁴⁴ The cases of Croatia, Denmark, Greece, Ireland, Slovenia, Spain and UK are explained in more detail in the Annex 4.

⁴⁵ Classification also used in some of the postal studies commissioned by the European Commission.



B. Eastern states: Bulgaria, Croatia, Czech Republic, Estonia, Romania, Slovakia and Slovenia

- **Bulgaria:** the reasons for derogation are the mountain areas, bad infrastructure, the lack of regular transport and the areas with dispersed population. In exceptional circumstances, the list is modified on the initiative of the universal provider or of the NRA. The list is published on the Internet, only in Bulgarian.
- **Croatia:** the exceptional cases are stipulated for the mountain areas and the areas with dispersed population.
- **Czech Republic:** there are exceptions only for delivery. These exceptions are e. g. dangerous roads to the point of delivery or places without appropriate access paths. The USP has to publish and inform the NRA about each postal address where it is not obliged to deliver, in accordance with the secondary legislation. The NRA regularly checks whether the exceptions are applied in compliance with the law. The list with exceptional cases is refreshed continuously.
- **Estonia:** the reasons for derogation are the islands and national and state holidays. Specifically regarding islands, the delivery must be done with the frequency of the connection of the regular transport.
- **Romania:** the reasons for derogations are the mountain areas, the areas with dispersed population, the depopulated settlements, the costs, the island character and the lack of regular transport. The list with the exceptional cases is refreshed whenever necessary, on the initiative of the universal service provider or of the NRA, and is published on the Internet and in a physical format available in every postal office.
- **Slovakia:** the reasons for exceptions are the mountain areas, the costs of service and the dispersed population areas. The list is refreshed whenever necessary (currently, approximately 2 times/year).
- **Slovenia:** the reason for derogation from the general rule of collection/delivery by the USO is the difficult access to the addressee or care for the health and safety of the deliverer.

C. Southern states: Cyprus, Greece and Spain

- **Cyprus:** the reasons for exceptions are the mountain areas, the insularity and the dispersed population. Currently, there is no list with such exceptions.
- **Greece:** the reasons for exceptions are the mountain areas, the islands geographical character, the dispersed population and the weather conditions.
- **Spain:** Nowadays there are only authorised exceptions to the postal address delivery in zones of low population density but no exceptions to the guaranteed frequency of delivery. The Spanish NRA publishes the resolution declaring exceptional conditions.

D. Non-EU states: FYROM, Norway, Iceland, Serbia and Switzerland

- **FYROM:** the reasons for exceptions are the mountain areas and the areas with dispersed population. Currently, there is no defined list of exceptions.
- **Iceland:** the reasons for derogation are the costs of service, the mountain areas, the insularity, the dispersed population and the weather. The list is updated annually.
- **Norway:** the reasons for exceptions are the mountain areas, the insularity and the dispersed population. At present there is no list with the exceptions.
- **Serbia:** the reasons for derogation from the rule are the mountain areas and the dispersed population areas. At present there is no list with the exceptions.

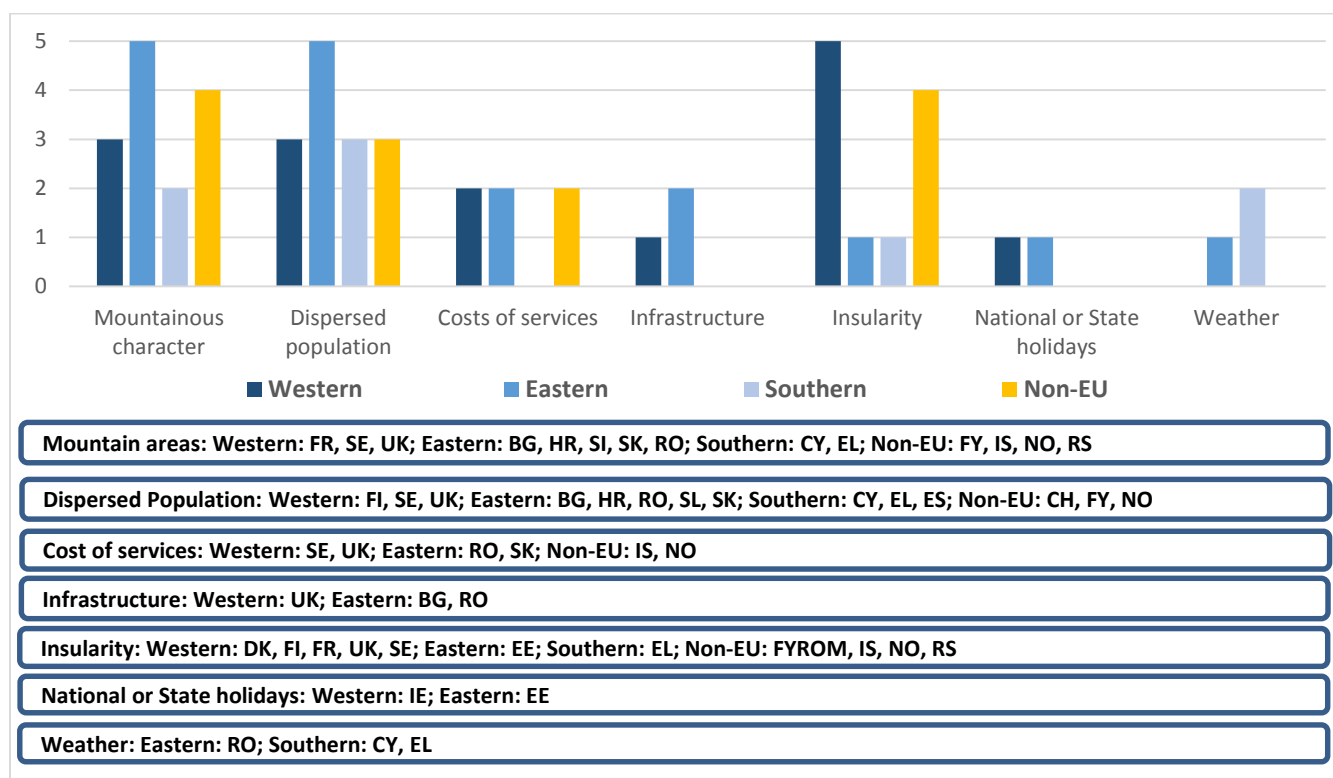


- **Switzerland:** the reasons for exception are dispersed population (and also exceptions when it would entail disproportionate difficulty, such as poor road conditions or substantial risk for the delivery staff.) The universal service provider has to report the cases to the NRA yearly.

A more detailed description of the following country cases (Croatia, Denmark, Greece, Ireland, Slovenia, Spain and UK) is available in annex 4.

Figure 11 gives a general picture regarding derogation in the frequency of collection and delivery.

Figure 11 – Derogation in the frequency of service





4.3. Access points

In accordance with the European legislation⁴⁶, the postal access points are defined as the physical facilities of the postal network, where postal items may be deposited, to be processed by the postal providers.

4.3.1. Collection letterboxes

The majority of countries have set requirements/standards to ensure that an adequate number of collection letterboxes are provided by the USP, the only exceptions being France and Spain where the regulation has not imposed such conditions.

The most often mentioned applicable criteria to ensure an adequate number of collection letterboxes are the following:

- number of collection letterboxes per locality;
- one collection letterbox per number of inhabitants depending on the type of settlement (difference is marked between urban and rural areas);
- maximum distance that one has to travel to the collection letterbox;
- maximum (air) distance between neighbouring collection letterboxes.

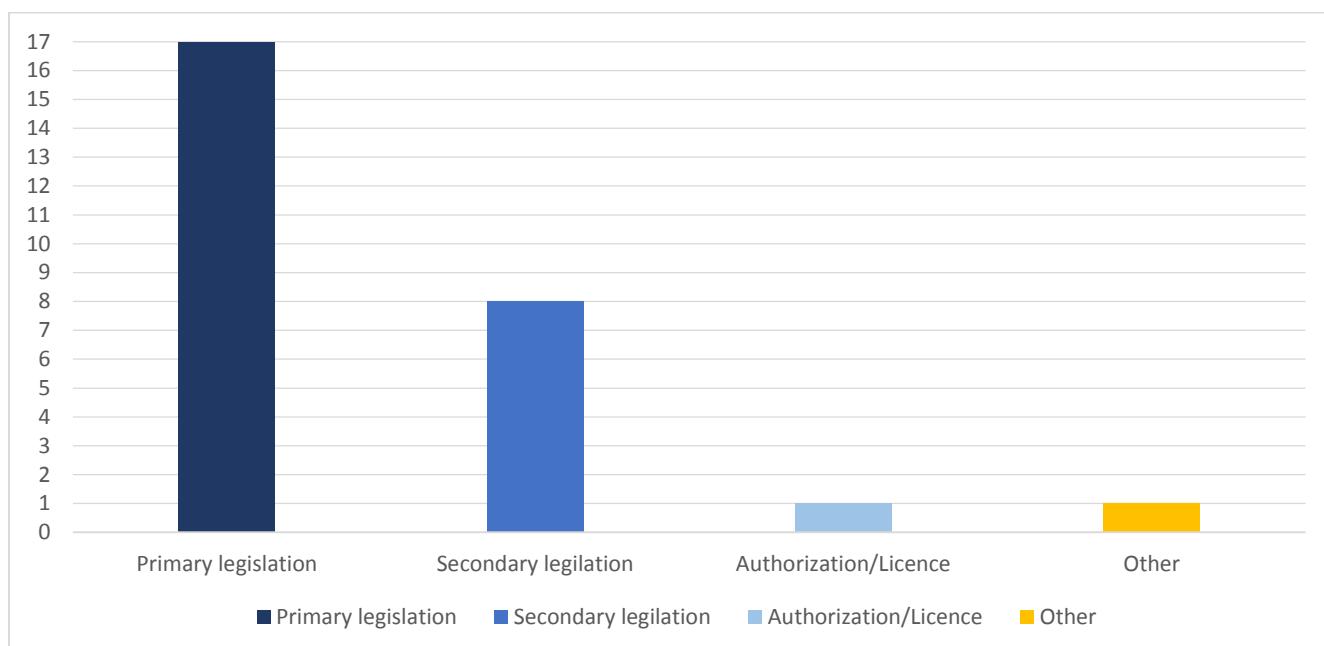
In addition, these requirements may also be combined. It should be noted that, in many countries, the requirements differ taking into consideration the criteria that apply to access points and to urban and rural areas. Almost half of the respondent countries have specific metrics for the minimum number of collection boxes that should be in place in relation to population density and distance. Only the distance criteria are also widely spread through Member States so as to ensure an adequate availability of letterboxes since 45 % of the respondents rely on distance. On the other hand, Denmark and Norway are examples of a “custom-made” approach, where the network of letterboxes is not based on predefined criteria, but has to be built according to users’ needs.

⁴⁶ Article 2 of Directive 2008/06/EC access points are the physical facilities, including letterboxes provided for the public either on the public highway or at the premises of the postal service provider(s), where postal items may be deposited with the postal network by senders.



In more than 50% of the respondent countries' requirements can be found mainly in legislation. Figure 12 below shows the distribution of the source of requirements/standards to ensure an adequate number of collection letterboxes in the European countries, clustered in geographical areas.

Figure 12 – Origin of the requirements or standards to ensure an adequate number of collection letterboxes ⁴⁷



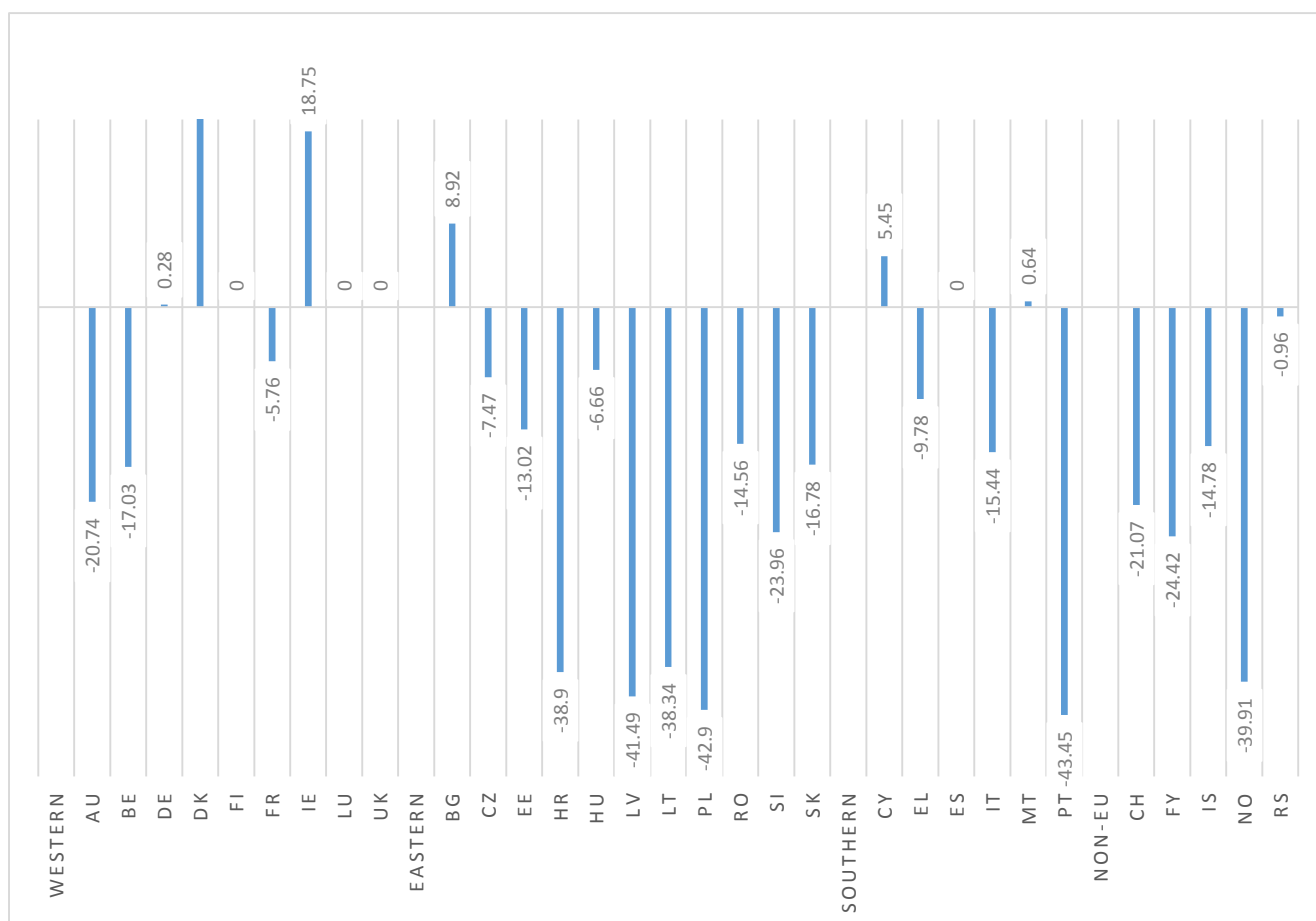
Information on the collection time is indicated on the collection letterboxes in 99% of the respondents. Ireland is the only European country where this information is not indicated on letterboxes.

Furthermore, information has been collected regarding the evolution in the number of collection letterboxes since 2008 (end of 2008 versus end of 2014). The figure 13 indicates that, although in some countries a growth is registered or no changes have occurred, in general there is a decrease in the number of collection letterboxes. This is significant in the cases of Portugal (43%), Poland (42%), Latvia (41%), Norway (39%), Hungary (38%) and Latvia (38%). As shown in figure 13, the exceptional cases of an increase are reported for Ireland (18.75%), Cyprus (5.48%), Malta (0.64%) and Germany (0.28%).

⁴⁷ Hu: The requirements for the adequate number of collection letter boxes are required in the Primary Legislation but also are written in the Universal Postal Public Service Contract between State and the USP.
 BU and RS: The standards are required by the Primary and Secondary Legislation,
 UK are required by the Primary Legislation and is written in the Operator's Licence.



Figure 13 – Percentage change in the number of collection letterboxes per countries from 2008 till 2014



4.3.2. Points of contact

In accordance with the European legislation⁴⁸, the number of contact points should be established on the territory closely linked to the needs of users. Those units may be managed directly by postal operators (postal establishments), by third parties (such as retail stores...) or correspond to services directly provided by the mailman. Keeping in mind the above mentioned provision, Member States should ensure that sufficient contact points are established, taking into account users' needs in order to satisfy the universal service obligation. It is also important to ensure equal treatment of users in urban and rural areas, without prejudice of geographical conditions.

It is a difficult task to evaluate whether the density of access/contact points corresponds to the necessary equilibrium between the users' needs and the cost-efficient provision of the universal service. In some countries, post offices have an important social function and they are quite often

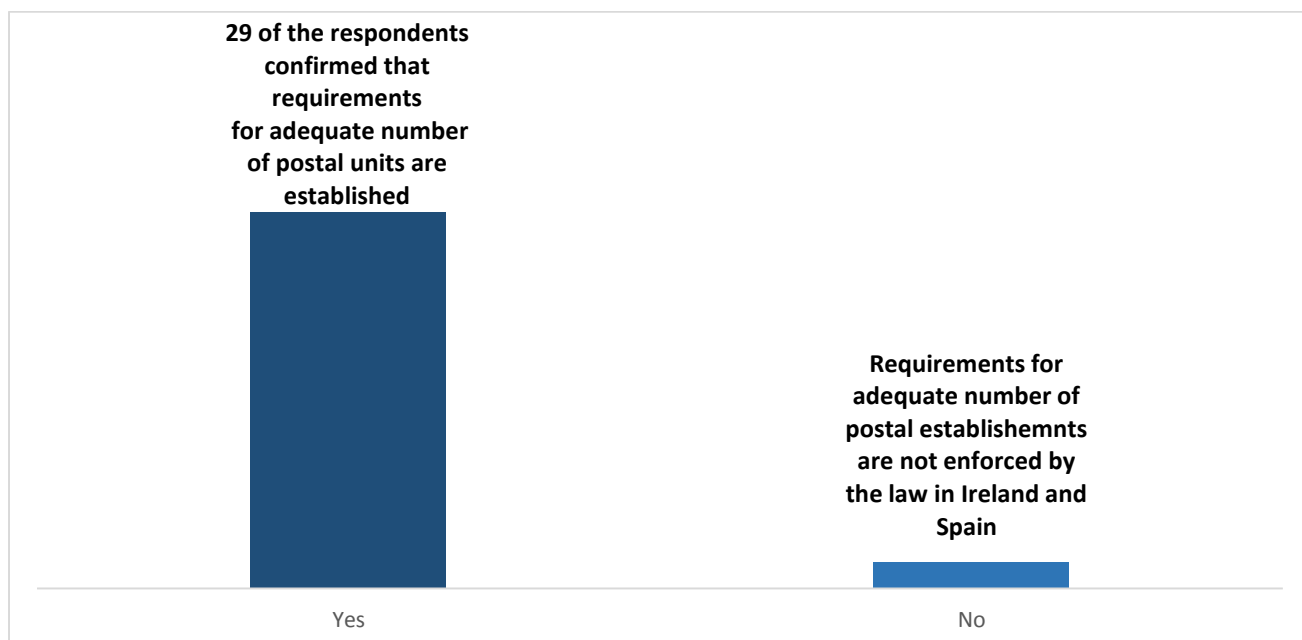
⁴⁸ In Article 3, 2 of Directive 2008/06/EC: "Member States shall take steps to ensure that the density of the points of contact and of the access points takes account of the needs of users".



seen as a last stronghold of the state in the small villages, which means that the density of the access/contact points is a particularly sensitive issue.

The answers received regarding this indicator revealed that in 29 cases of the respondents (93.55%) the requirements of density are enforced in order to respond to consumer needs.

Figure 14 – Requirements or standards to ensure an adequate number of points of contact/postal establishments



When questioned about the existence of requirements/standards for an adequate number of collection letterboxes, some countries stated they have requirements for collection letterboxes but not requirements concerning the number of contact/postal establishments, and vice versa.

The vast majority of the countries have confirmed that they have requirements/standards in place. In 26 of those countries, the requirements and standards are expressly provided for in the legislation. The special cases are Belgium, Hungary and the UK. In Belgium, the standards are included in the USP's "Management Contract", in Hungary they are included both in the legislation and in the "Universal Postal Public Service Contract", and in the the UK they are stipulated in the "Licence of the USP".

The common criteria to ensure an adequate number of points of contact/postal establishments are:

- number of postal establishments per locality;
- one postal establishment per number of inhabitants, which could depend on the size of the settlement. We should note that differences between rural and urban areas are not an exception;
- maximum distance that one has to travel to the nearest postal establishment;
- maximum (air) distance between neighbouring postal establishments;
- minimum number of post offices, providing UPS or full range of postal services;
- percentage of population at a certain distance from the postal establishment.

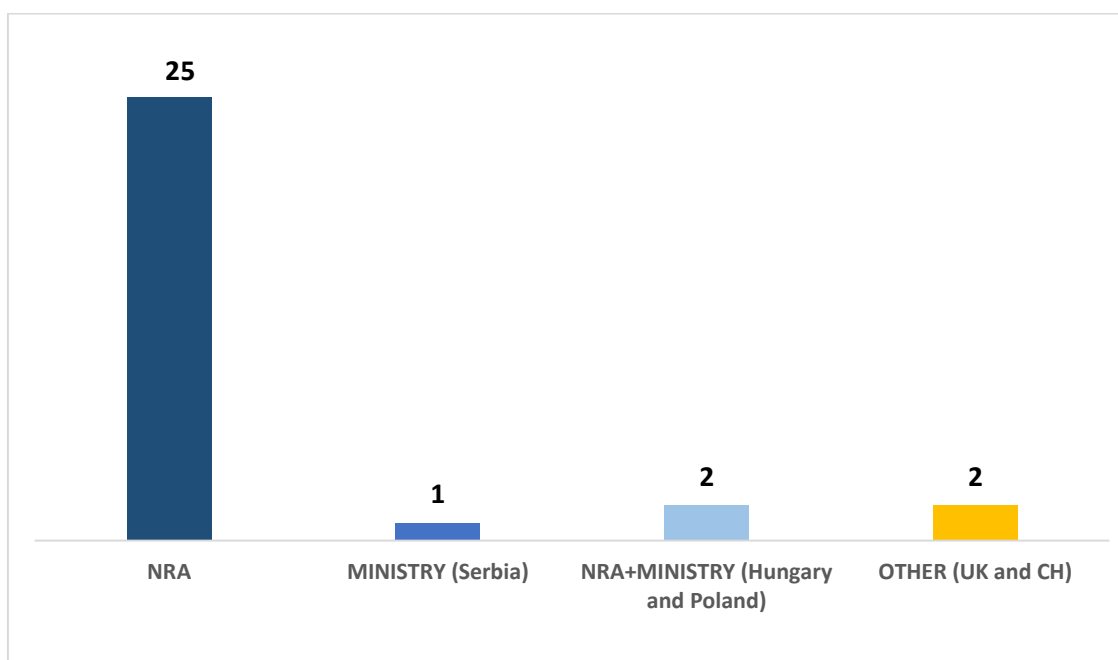


Generally, a combination of criteria is used, which varies between countries and depends on the geographic and demographic peculiarities.

As shown in the figure 15, in the vast majority of European states, the NRA is usually the authority responsible for ensuring compliance with the requirements regarding an adequate number of postal establishments on the national territory. Despite this, there are some special cases:

- **UK:** the 'Post Office Limited', is a separate autonomous business unit with no links to the USP, is the entity responsible for ensuring the compliance with the requirements. The smaller subsidiary post offices are managed as 3rd franchises entities.
- **Serbia:** according to the Serbian Postal Service Act, the NRA monitors postal operators' activities, based on remarks or complaints from the customers. Nonetheless, the Ministry has to perform a monitoring inspections through the Postal Services Inspector.
- **Poland:** the NRA is in charge of ensuring the compliance with the requirements in collaboration with the Ministry.

Figure 15 – Entity entitled to check compliance with the requirements regarding an adequate number of postal establishment



In the majority of cases, the supervision is carried out by requiring information to the USP or to various local authorities/organisations (45% of the respondents – 13 cases from 29 respondents). The second most common method is to obtain information by using publicly accessible information (17% of the respondents). Additionally, there are also combinations of the methods mentioned above.

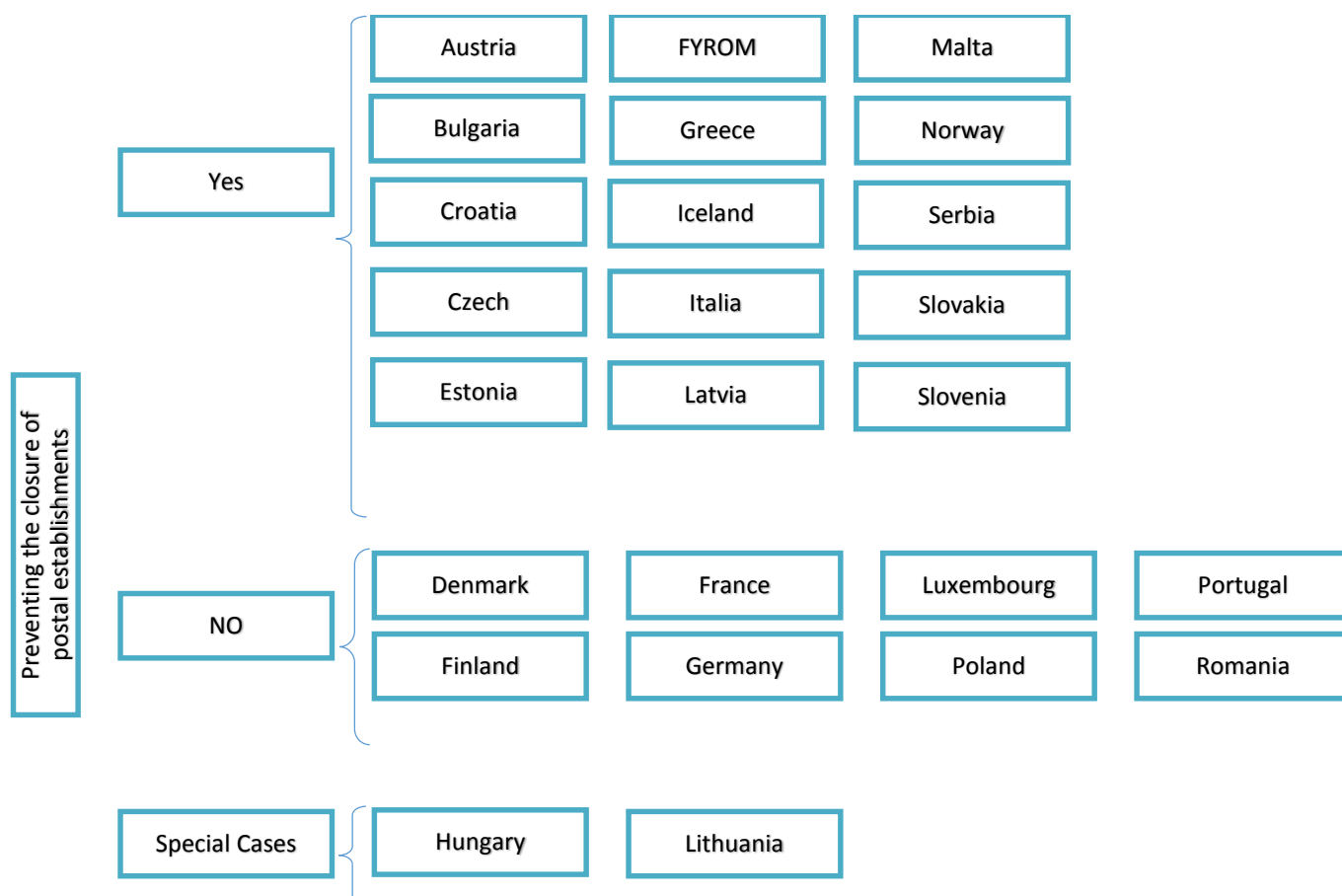
Nevertheless, only 65% of the respondents indicated to have a system of sanctions in place in the case of non-compliance with the requirements on an adequate number of postal establishments. In most of these cases, the competent authority could resort to fines/penalties (37% of the respondents) or perform a regulatory action, e.g. administrative or legal sanctions (41% of the respondents). Usually, measures are gradual: first the USP is asked to comply with the requirements and, only after that, a corrective measure is applied.



Figure 16 below shows whether the NRAs have the power to prevent closure of postal establishments: 52% of the NRAs have these powers and 28% do not. There are also some special cases:

- **Hungary:** In case of closure of a postal establishment, the NRA can start a special procedure if the closure of postal establishments is in breach of law and/or of the Universal Postal Public Service Contract, and decide on the needed measures;
- **Lithuania:** The regulator is obliged to supervise compliance by the USP provider with the characteristics of the postal network established by the Ministry of Transport and Communications. If the USP fails to comply with the requirements, the regulator may take actions in order to prevent the closure of a postal establishment (to warn the USP provider, to inform the Ministry, to initiate an economic sanction, etc).

Figure 16 – Power to prevent the closure of postal establishments



Additionally, care for disabled persons has been kept in mind in some countries as postal points of contact should be accessible for all users, including disabled persons. Only in Belgium, Bulgaria, Croatia, Cyprus, the Czech Republic, Finland, Greece, Hungary, Poland and Switzerland most of postal establishments are equipped for disabled persons. In the rest of the European countries there are no specific available data on this.



Figure 17 below illustrates the percentage of distribution of points of contact in each country in 2014.

Figure 17 – Points of contact per country (distribution in %)

	Permanent PO full range of services	Permanent PO limited range of services	Mobile post offices	Mailman 1 ⁴⁹	Mailman 2 ⁵⁰	Seasonal post office	Permanent PA managed by 3rd entity	Other
Austria	29,0						71,0	
Belgium	50,2						49,8	
Bulgaria	54,0	1,0		45,0				
Croatia	99,7					0,3		
Cyprus	0,05						99,5	
Czech	45,6	0,2			51,95		2,22	
Denmark	2,3						97,7	
Estonia	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Finland	100							
FYROM	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
France	56,1						43,9	
Germany	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Greece	15,0	0,5		54,5			15,0	15,0
Hungary	71,0		16,0				12,4	0,6
Iceland	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Ireland	4,6						95,4	
Italy	100,0							
Latvia	91		0,15	4,0		4		
Lithuania	81,01	2,71	16,28					
Luxembourg	85,9						14,91	
Malta	53,97		3,17				42,86	
Netherlands	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Norway ⁵¹	41	1555				1379	24	
Poland	60,0						40,0	
Portugal	26,7		0,2				73,1	
Romania	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Serbia	64,67	19,88						15,45
Slovakia	85,9	11,00	0,3				2,8	
Slovenia	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Spain	26,0	7						67 ⁵²
Switzerland	45,0			36,0			19,0	
UK	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

⁴⁹ Mail man is providing a full range of services offered by postman of the USP.

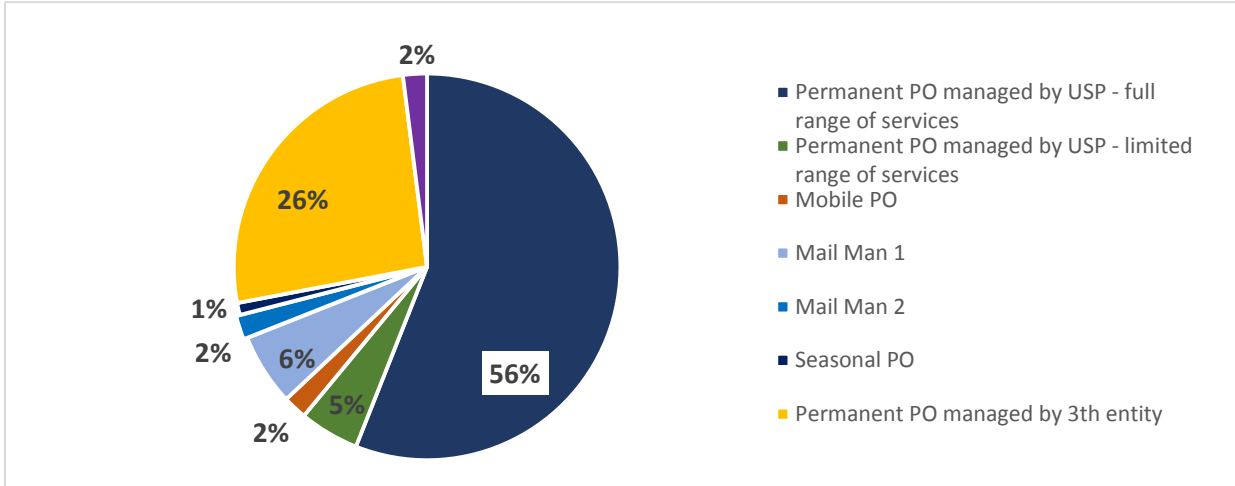
⁵⁰ Mail man is providing a basic services offered by postman of the USP.

⁵¹ NO: absolute values.

⁵² ES; others include mailman and mobile post offices



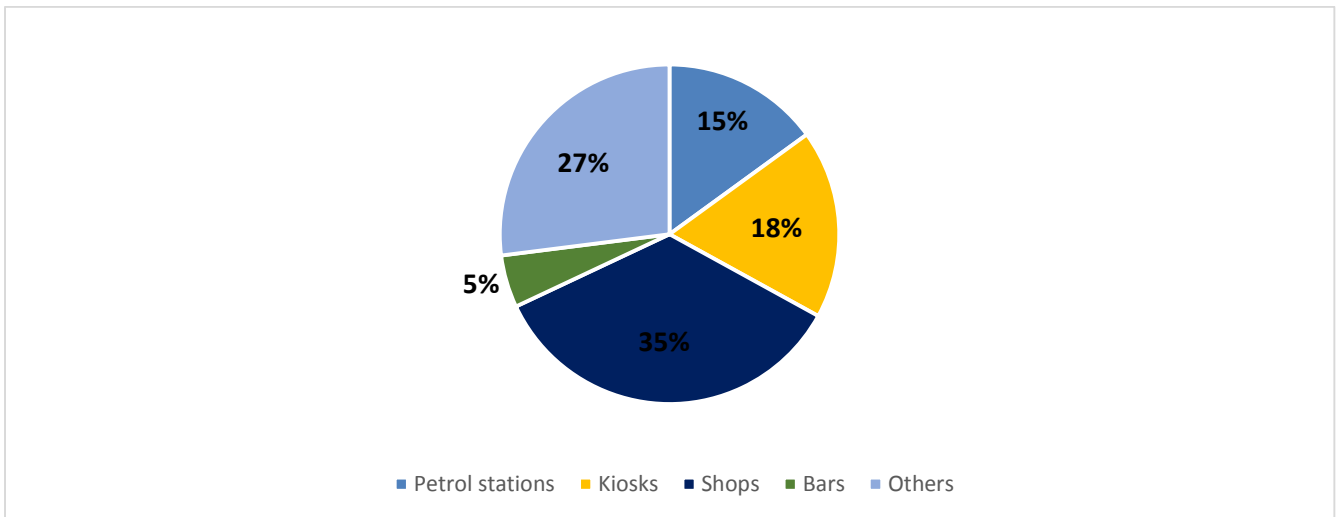
Figure 18 – Percentage by type of points of contact in 2014



The most common type of points of contact at the European level, based only on the information received from the responding countries, remains access to a permanent post office with a full range of services 56(%) followed by post agencies managed by third parties (26%).

The figure 19 below illustrates the location of postal agencies managed by third parties.

Figure 19 – Location of post agencies managed by third parties

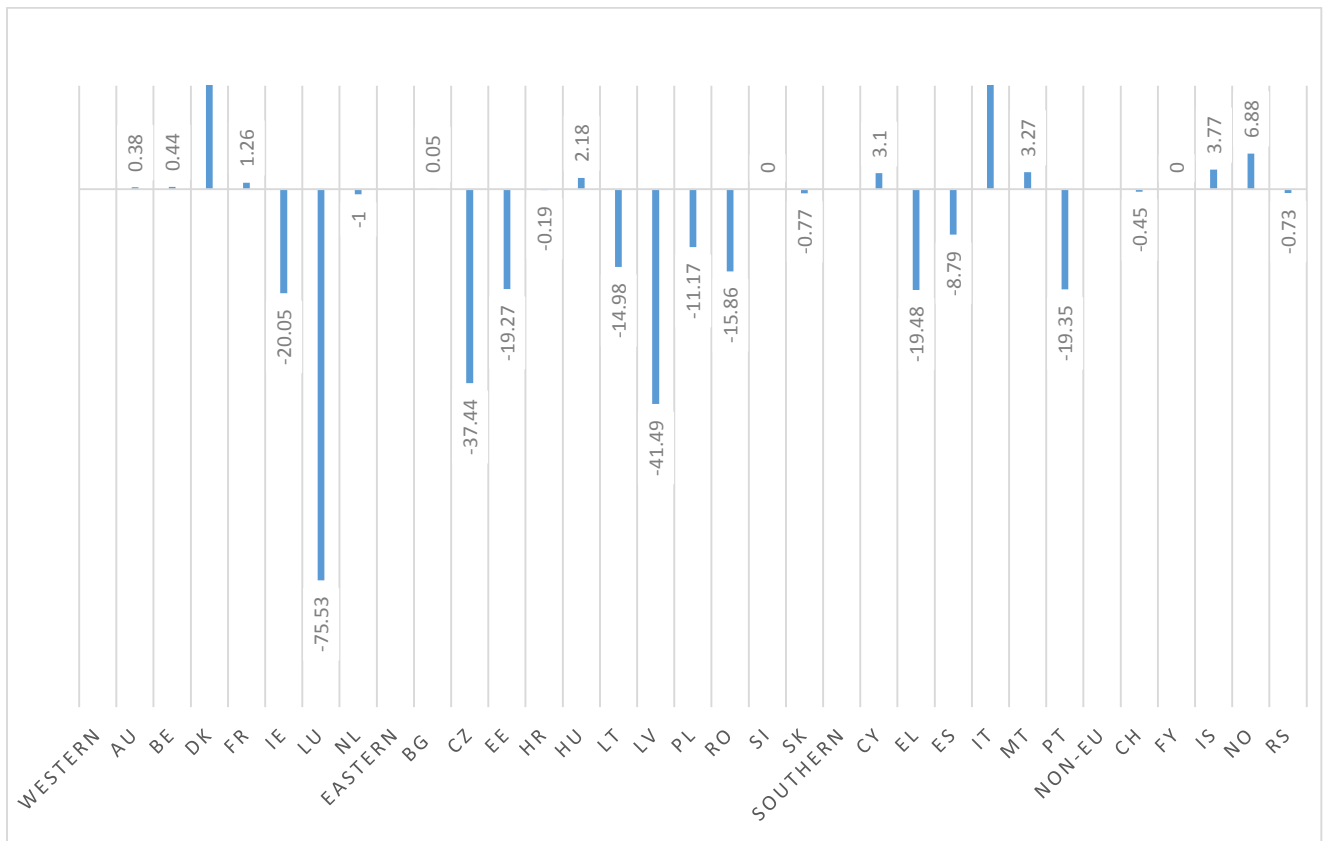


Postal agencies managed by third entities are mainly located in shops, followed by kiosks and petrol stations.



Furthermore, information has been collected on the evolution of the number of points of contact of the USP for the period 2008 -2014. Where the data for 2008 was not available, the oldest data available was taken. In the vast majority of countries that provided data on the number of points of contacts, we found a decrease in the number of permanent post offices managed by the USP with full range of service and an increase of other types of points of contact, especially permanent post agencies managed by a 3rd entity.

Figure 20 – Evoltion of the number of points of contacts in the period 2008-2014





4.4. Measurement of consumer satisfaction

In 2014, the overall trend of those NRAs monitoring consumer satisfaction remained relatively consistent. The resources required to undertake monitoring must also be taken account of when deciding to engage a monitoring programme. It may be exclusive and resource-intensive to do so. According to the responses to the 2015 questionnaire, 14 (45%) out of the 31 respondent NRAs use or monitor indicators of consumer satisfaction in their country, while 17 (55%) NRAs do not.

The results from the 2015 questionnaire show that 9 USP's in Europe conduct studies and publish results regarding the level of consumer satisfaction (the USPs from Belgium, Denmark, Finland, FYROM, Norway, Serbia, Slovakia, Slovenia and Sweden).

Figure 21 – NRA and USP uses/monitors measurement of consumer satisfaction

Question	Answer	Count	Country	%
Do you use/monitor indicators of consumer satisfaction in your country?	Yes	14	BE, FI, FYROM, EL, LU, IE, LT, MT, NO, PT, RS, SK, SL, UK	45%
	No	17	AT, BG, CH, CZ, DE, DK, EE, ES, FR, HR, HU, IT, LV, NL, NO, PL, RO, SI	55%
Does the USP in your country conduct surveys regarding customers' needs and publish the results?	Yes	9	BE ⁵³ , DK, FI, FYROM, NO, RS, SE, SI, SK ⁵⁴	30%
	No or no information	21	AT, BG, CY, CZ, DE, EE, ES, FR, HR, HU, IE, IS, IT, LT, LU, LV, MT, NL, PL, PT, UK	70%

In Annex 5, you will find the links towards the customer satisfaction survey published by the NRA and in annex 6, the results of the consumer satisfaction survey published by the USP.

⁵³ NRA publishes the results.

⁵⁴ The results are not published.



4.5. Surveys regarding customers' needs

In 2014, the overall trend of those NRAs monitoring customer needs remained relatively consistent. In terms of surveys regarding consumer needs and market, 16 NRAs (48%) answered that they conduct such surveys, while the other 17 NRAs (52%) do not.

The surveys are mostly carried out annually or on an ad hoc basis to serve regulatory needs and are usually conducted by an independent body. Different methodologies are used, including telephone interviews/computer-assisted telephone interviews (CATIs), standardised questionnaires, and face-to-face interviews.

In the majority of cases, the results of the NRA studies regarding consumer needs are published on the Internet.

The consumer needs surveys conducted by the USPs are in most cases not publicly available. Only in Switzerland, Denmark and Slovenia are these USP surveys published.

Figure 22 – NRA and USP uses/monitors measurement of customer needs

Question	Answer	Count	Country	%
Do you conduct surveys regarding customers' needs or market surveys?	Yes	16	BE, CY, DK, EL, FI, IE, IS, LT, MT, NL, PT, RO, RS, SE, SI, UK	48%
	No	17	AT, BG, CH, CZ, DE, EE, ES, FR, FYROM, HR, HU, IT, LU, LV, NO, PL, SK	52%
Does the Universal service provider in your country conduct surveys regarding customers' needs and publish the results?	Yes	3	CH, DK, SI	9%
	No or no information	29	AT, BE, BG, CY, CZ, DE, EE, EL, ES, FI, FR, FYROM, HR, HU, IE, IS, IT, LT, LU, LV, MT, NL, NO, PL, PT, RS, SE, SK, UK	91%

In Annex 7, you will find the links towards the customer needs survey published by the NRA and in annex 8, the results of the consumer needs survey published by the USP.



5. Current situation on the assessment of consumer protection and complaint handling procedures

The complaint handling and consumer protection of the questionnaire has been analysed taking into consideration the following four dimensions:

1. competence of NRAs regarding complaint handling;
2. information provision and access to complaint handling and dispute resolution;
3. compensation schemes for individual customers;
4. data on complaints.

5.1. Competence of NRAs regarding complaint handling

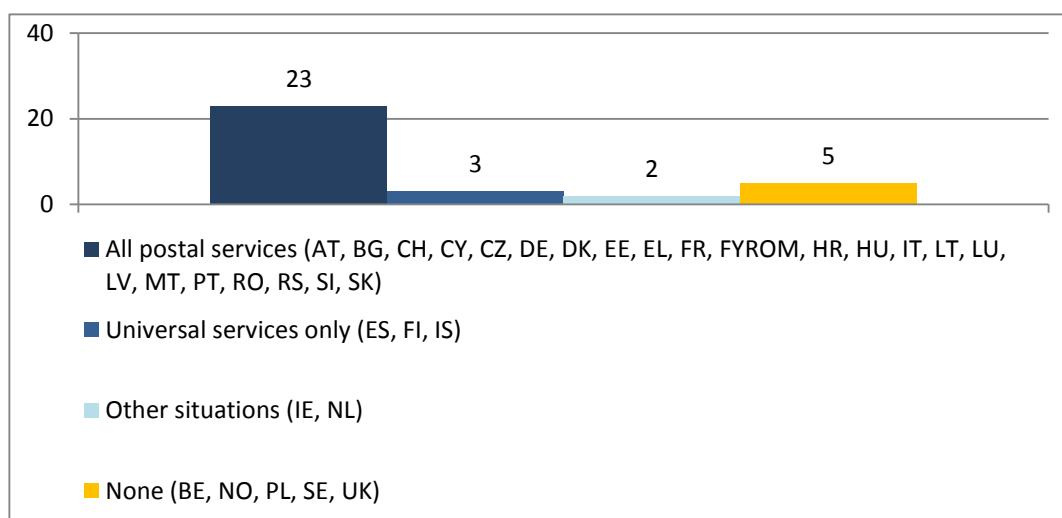
This subchapter evaluates the scope and competence of the NRAs in handling complaints about postal services and looks at the other organisations that customers⁵⁵ can complain to.

Figure 23 shows that in 26 (79%) out of the 33 respondent countries, the NRA is generally responsible for dealing with user complaints. In three of these countries (9%), the NRA only handles complaints with regard to the Universal Service while, in the vast majority (67%), all postal service issues can be addressed. Six NRAs (18%) stated that they are not obliged to handle user complaints.

The number of NRAs dealing with user complaints has only slightly changed over the last years (26 in 2012 and 24 in 2013).

Two countries stated that they have a different situation, e.g. in the Netherlands, the NRA is not legally obliged to deal with user complaints, but it may do so where it assumes an infringement of postal law.

Figure 23 – NRAs dealing with user complaints



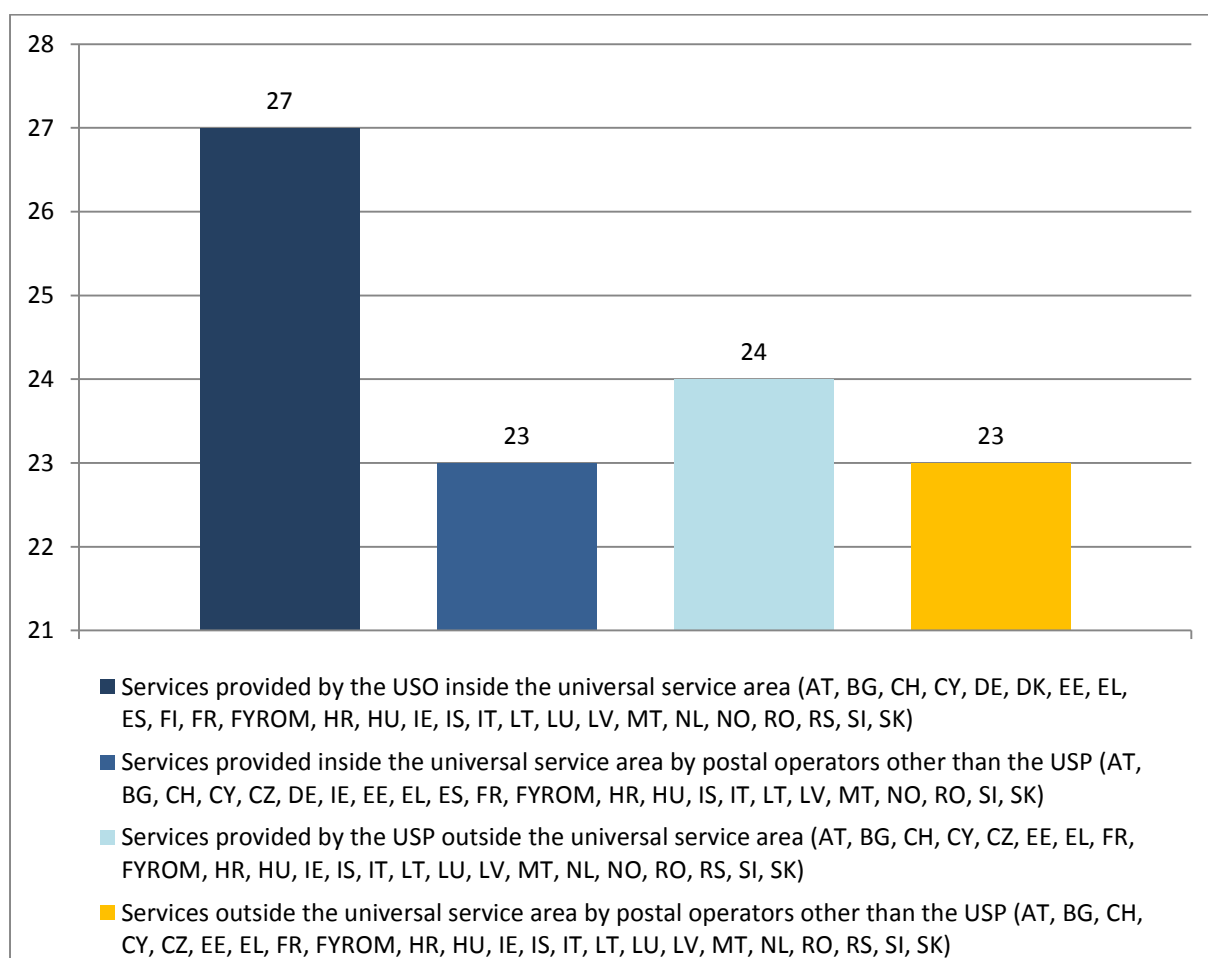
⁵⁵ "Customer" has a broader meaning, so that it can include customer or user.



Amongst the 28 countries where the NRA is generally responsible for dealing with user complaints (including IE and NL), 27 have procedures in place to resolve complaints regarding services within the scope of the US provided by the USP. Out of these 27 NRAs, 23 also have procedures that apply to complaints regarding services within the US-scope provided by other operators than the USP. Concerning services outside the scope of the US and provided by the USP or other providers 24 and 23 countries have procedures in place respectively.

Figure 24 below indicates which procedures are in place to resolve complaints according to the services and the provider.

Figure 24 – Procedures in place to resolve the issue complained about



Almost half of the respondent NRAs (48%) indicated that the USP has implemented the CEN standard. However, concerning other postal service providers active in the universal service area, the standard is only implemented in 2 countries (6%) and is not implemented in any country for other postal service providers. The majority of NRAs (52%) indicated that the standard has not been implemented by any service provider.

These results show an increase in the number of countries where the standard has been implemented by the USP (14 out of 31 against 10 out of 30 in 2013). The situation remains the same for other postal service providers.

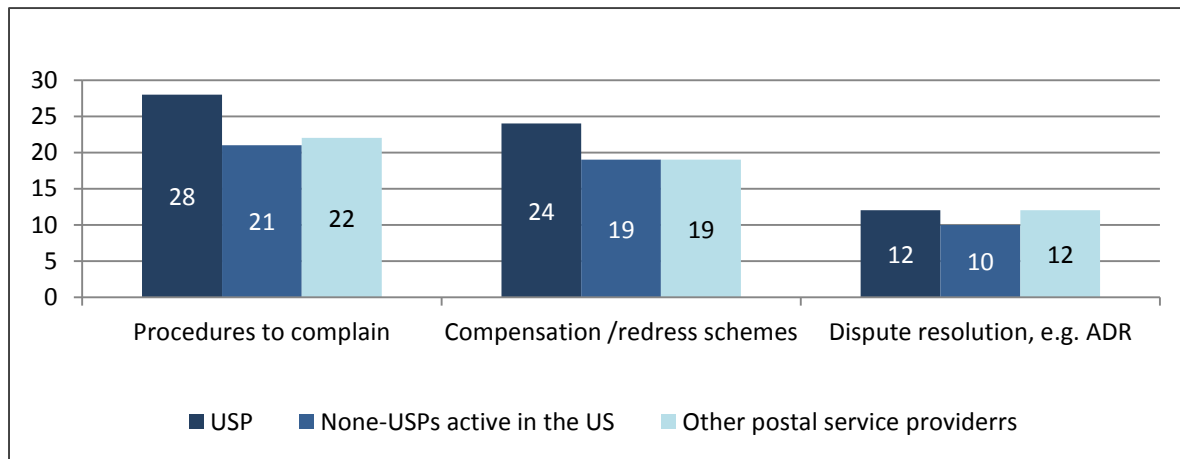


5.2. Information provision and access to complaint handling and dispute resolution

This chapter analyses the information available to users on complaint handling procedures, redress schemes and means of dispute resolution as well as on the number of complaints received by postal service providers and the NRAs. It also looks at the existence of regulation regarding complaints.

Figure 25 below indicates whether postal service providers are obliged to publish information about procedures to complain, redress schemes and means of dispute resolution.

Figure 25 – Obligations to provide information



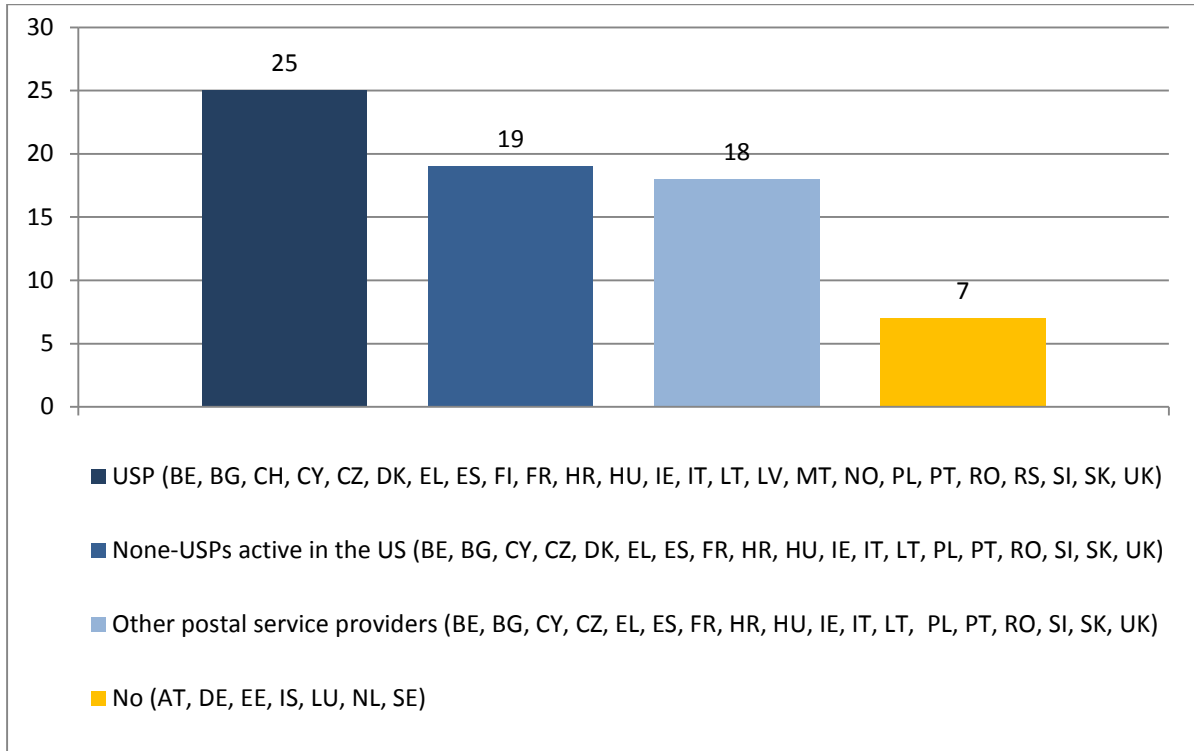
There have not been any changes in the number of countries obliging the postal service providers to publish information. In most countries, USPs are generally obliged to publish information about complaint handling procedures and redress schemes, which was mentioned by 28 (85%) and 24 (73%) of the NRAs, respectively. In fewer countries (12 of 36%), there is an obligation covering information on means of dispute resolution. Five countries have no obligation to publish information.

In most cases, the obligation to publish information also (partially) extends to other postal service providers.



Figure 26 below indicates which postal services are subjected to regulation of complaint handling procedures.

Figure 26 – Regulation of complaint handling procedures



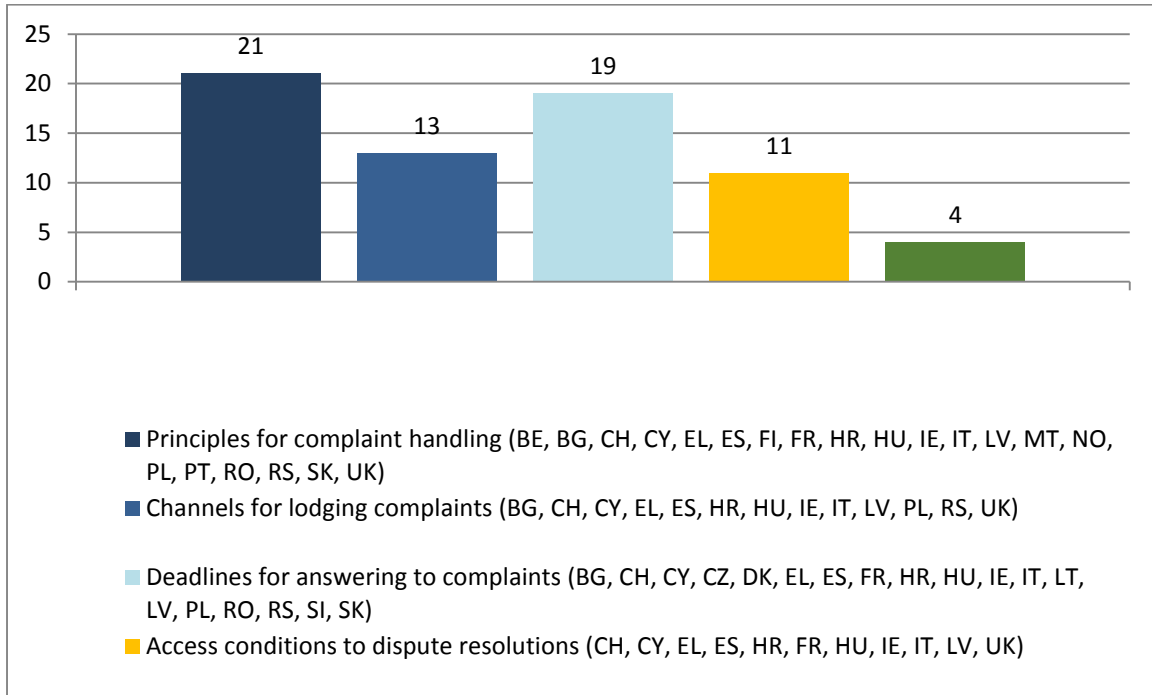
The postal services providers’ complaint handling procedures are regulated in the majority (25 countries or 76%) of the cases. Seven (21%) out of the 33 respondent NRAs stated that there is no regulation concerning this. Overall, the numbers concerning this question have not changed significantly.

The regulation covers the USP in all cases. Other service providers active within the scope of the universal service and other operators providing services outside the universal service scope are covered in 19 (58%) and 18 (56%) cases respectively.



Figure 27 below shows the scope of the regulation on complaint handling procedures.

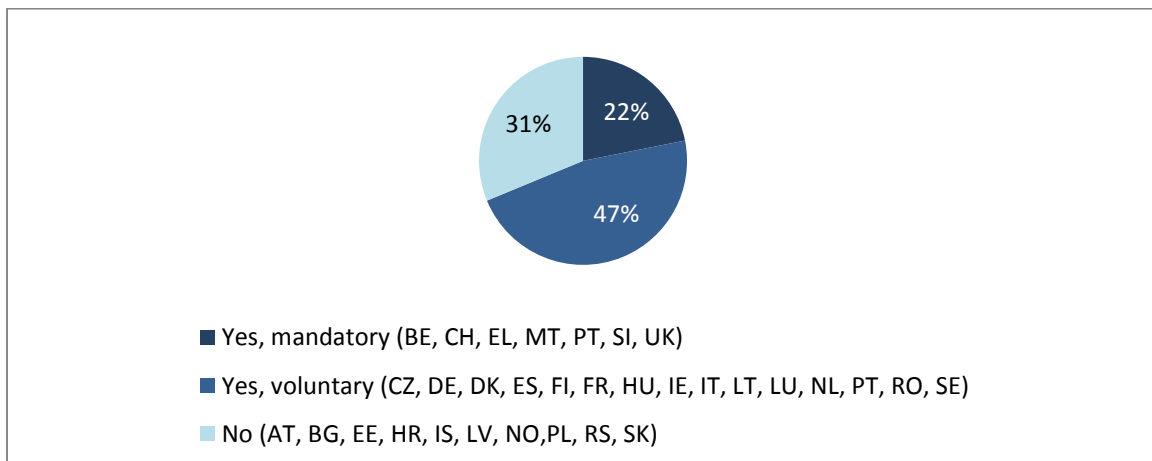
Figure 27 – Scope of the regulation on complaint handling procedures



The scope of the regulation on complaint handling procedures varies between the 33 countries. As in the previous years, mostly principles for complaint handling and deadlines for answering to complaints are regulated, in 21 (64%) and 19 (58%) countries respectively. Thirteen (39%) NRAs answered that the postal service providers’ channels for lodging complaints are subject to regulation and only in 11 countries (33%) the conditions of access to dispute resolution are regulated.

Figure 28 below indicates whether an alternative dispute resolution (ADR) exists and if so, which kind.

Figure 28 – Alternative (or out-of-court) dispute resolution (ADR)



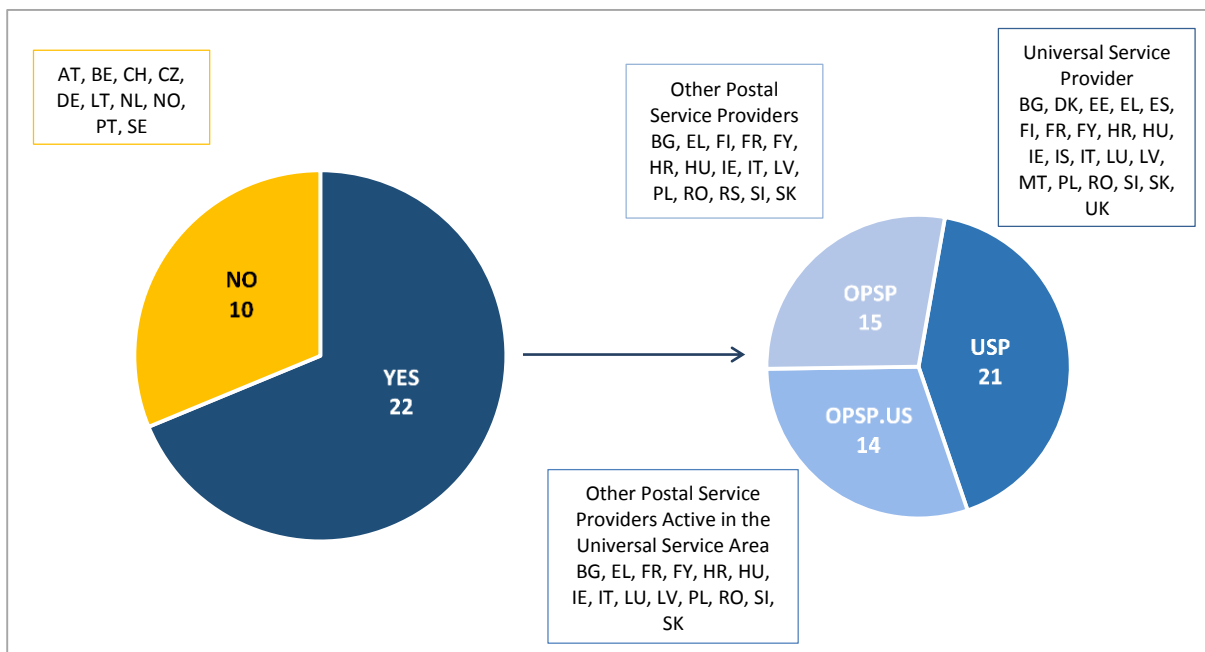


5.3. Compensation schemes for individual customers

This subchapter looks at the existing compensation schemes for individual customers, focusing on their framework, scope and disclosure.

As indicated in figure 29, in most countries (22), there is an obligation for a specific compensation scheme and it covers the USP in almost all cases. These results show an increase in the number of countries that have such an obligation, 5 more than in 2013. The existing obligations also extend to other postal service providers in 15 countries and to providers active in the universal service in 14 countries. When asked to explain why there is no obligation on this matter, the countries that were in this situation (10) mentioned as main reasons the lack of justification in legislation and the fact that this subject is covered by general terms and conditions and civil law.

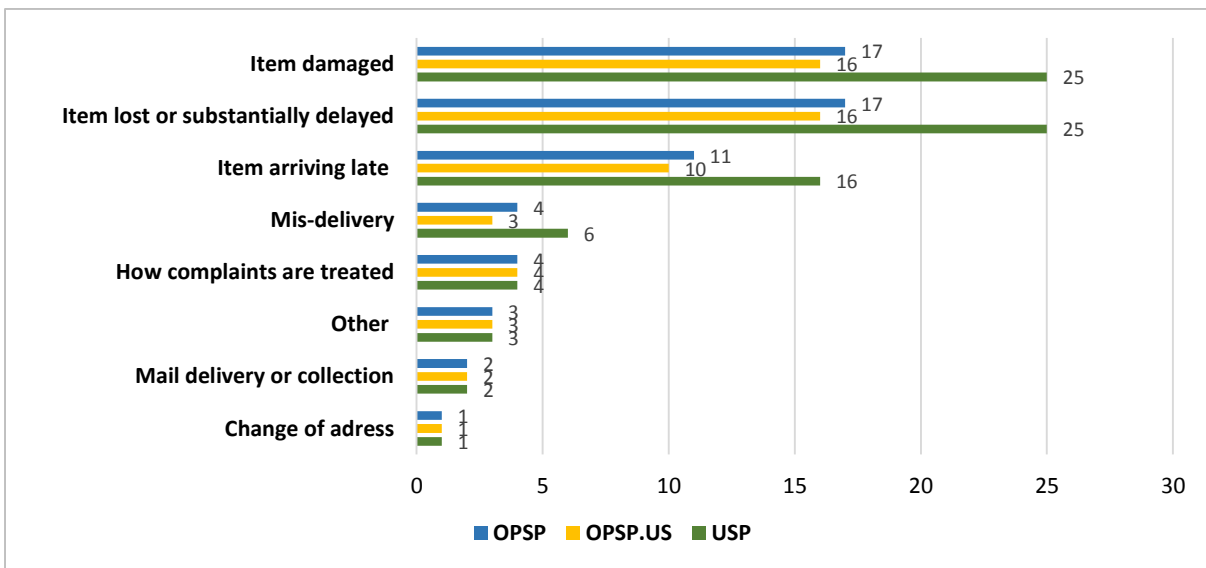
Figure 29 – Mandatory compensation schemes for individual customers





As to types of service failures covered by existing compensation schemes, figure 30 shows that in 25 countries these schemes cover, for the USP, items damaged and items lost or substantially delayed. Items arriving late were mentioned as being covered in 16 countries. In most of these countries, compensation schemes also cover these types of service failures for other postal service providers (active or not in the universal service area).

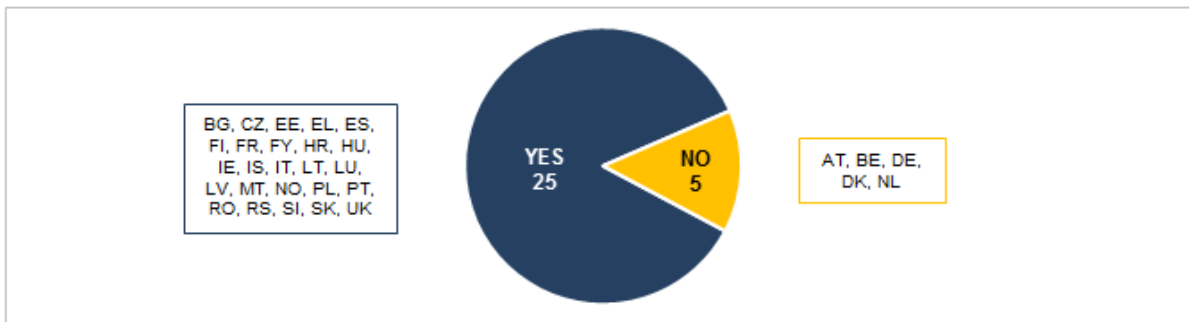
Figure 30 – Coverage of existing compensation schemes for individual customers per type of service failure



Note: The list of countries per postal service provider and type of service failure covered is available in the appendices as well as notes regarding NRA particularities (annex 9).

Turning to the mechanisms in place to make consumers aware that compensation schemes are available, the majority of countries (26) indicated that these mechanisms exist. One of the reasons forwarded by countries that have no such mechanisms in place was the lack of legal basis.

Figure 31 – Mechanisms in place to make customers aware of compensation schemes





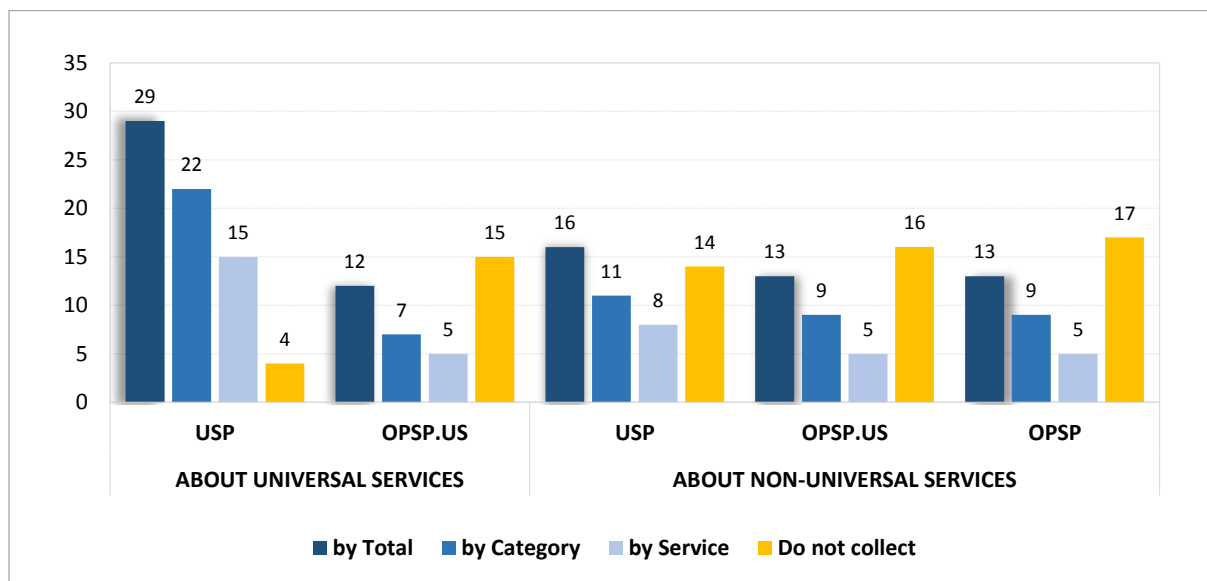
5.4. Data on complaints by NRAs

This subchapter looks at the data that NRAs are collecting on the number of complaints about postal services in general and, in particular, about cross-border services. Data on the number of complaints collected by NRAs is also published.

5.4.1. Collection of data by NRAs

Based on figure 32, almost all respondent NRAs collect data on the number of complaints received by the USP regarding universal services (29 out of 33), of which 22 and 15 respectively also indicated to collect data by category and by service. Fewer NRAs collect data on complaints received by the USP about non-universal services (16). The majority of NRAs do not collect data on the number of complaints received by other postal service providers.

Figure 32 – Collection of data by NRAs on the number of complaints received by postal service providers



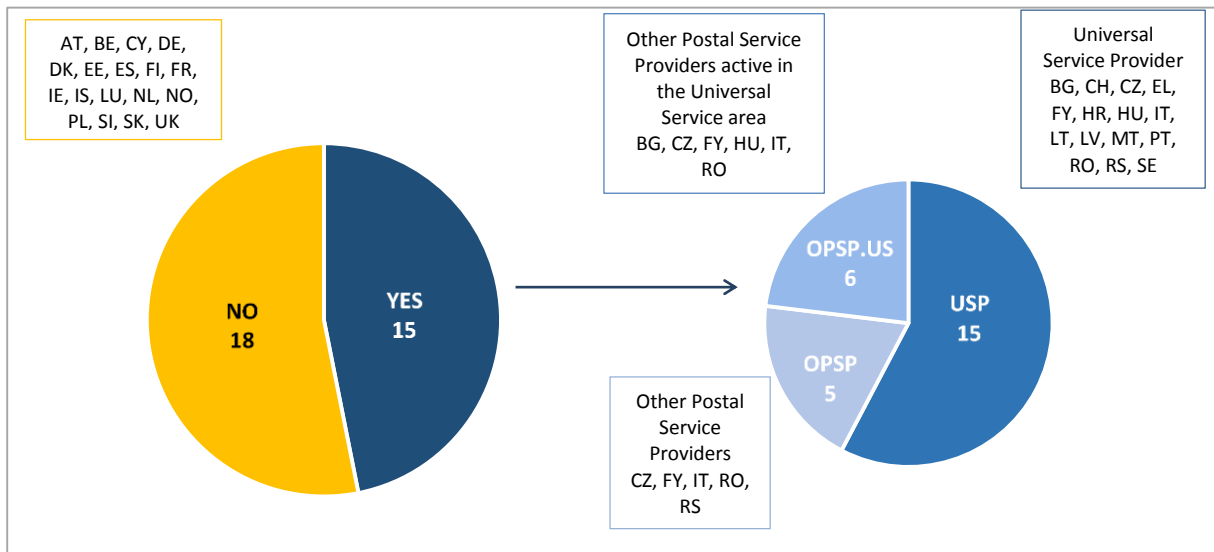
Legend: USP – Universal Service Provider | OPSP.US – Other Postal Service Providers active in the Universal Service area | OPSP – Other Postal Service Providers

Note: The list of countries where NRAs collect data on complaints and from which postal service providers is available in the appendices (annex 10.1.).



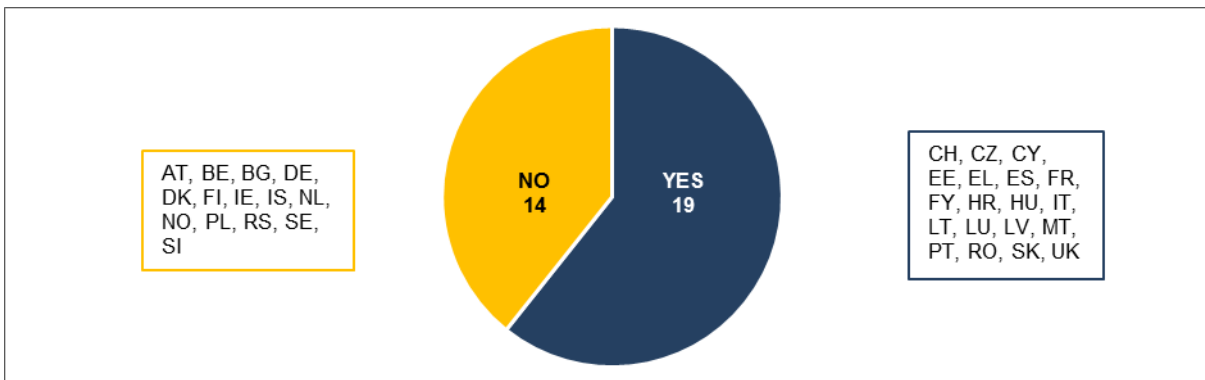
Figure 33 focuses on cross-border services complaints, showing that almost half of the responding NRAs (15 out of 33) indicated they do collect this information. All NRAs collecting this information do so for the complaints received by the USP. Fewer NRAs collect these data regarding other postal service providers. Comparing with the 2013 information, these results show a decrease in the number of NRAs that indicate they collect data on cross-border complaints (18 for the USP in 2013).

Figure 33 – Collection of data by NRAs on the number of complaints received by postal service providers about cross-border services



Turning to complaints about cross-border services received by the NRAs, the majority indicated to have this information (19), 5 more than in 2013 (see figure 34).

Figure 34 – Data on the number of complaints about cross-border services received by NRAs





5.4.2. Complaints on postal services collected by NRAs

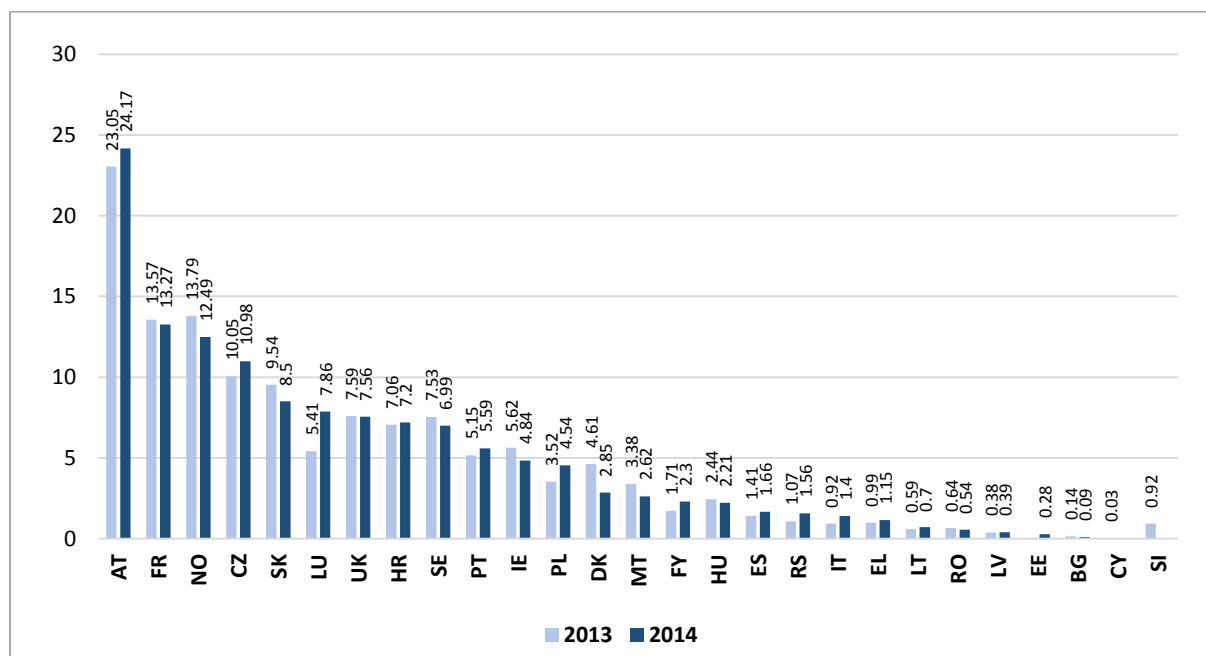
The figures in this chapter shows data on the number of complaints received by USPs and by NRAs in 2013 and 2014 per country and per number of inhabitants in each country⁵⁶. Data on the number of complaints received by USPs about cross-border service complaints is also showed.

When analysing this data, it should be taken into consideration that comparisons between the numbers presented by the countries may reflect differences in the legal and regulatory frameworks, market volumes/structure, as well as cultural aspects. For instance, in some countries end-users may have to address their complaints first to the service provider before submitting it to the NRA while in others they are able to reach the NRA in first or second instance (depending on these particularities, numbers on complaints may overlap). These and other aspects may have a significant impact on the number of complaints that postal service providers and NRAs receive.

Also relevant to be aware of when analysing this data is that the numbers provided by NRAs may have differences in scope. For instance, some may consider only written complaints while others may include only justified complaints.

Figure 35 shows the complaints received by USPs about universal service per country per 1000 inhabitants. The complaints range in 2014 from 24,17 (Austria) to 0,09 (Bulgaria).

Figure 35 – Complaints received by USPs about universal service per country per 1000 inhabitants, 2013-2014



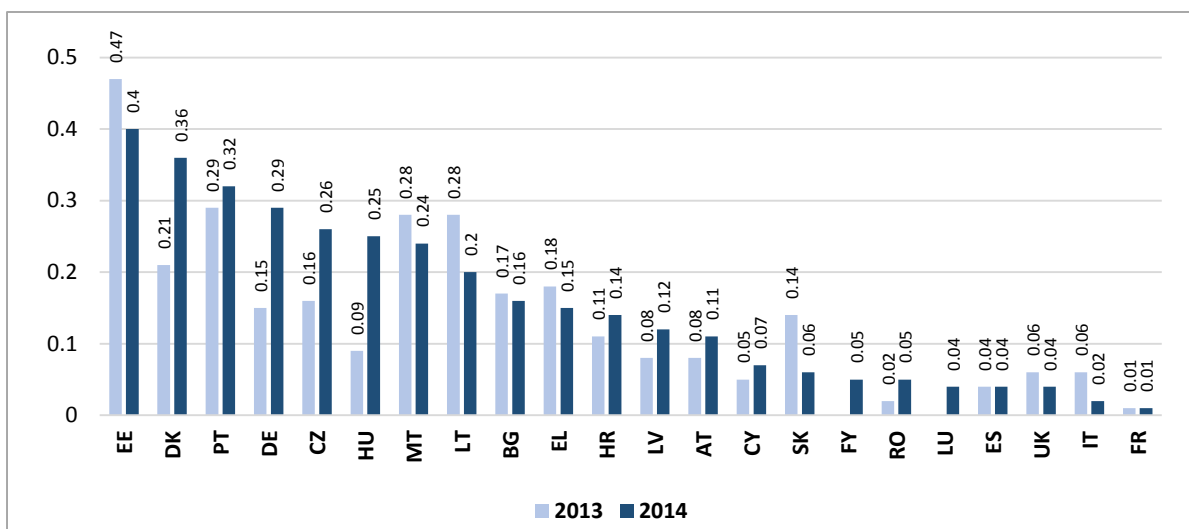
Note: The number of complaints received by USPs and the population per country are included in the appendices as well as notes regarding NRAs particularities (annex 10.2.).

⁵⁶ The information on the population of each country that was used is available at <http://ec.europa.eu/eurostat/tgm/table.do?tab=table&init=1&language=en&pcode=tps00001&plugin=1>. For this report it was last collected on October 1st, 2015.



Figure 36 shows complaints received by NRAs about postal services per country per 10000 inhabitants. The complaints range in 2014 from 0,40 (Estonia) to 0,01 (France).

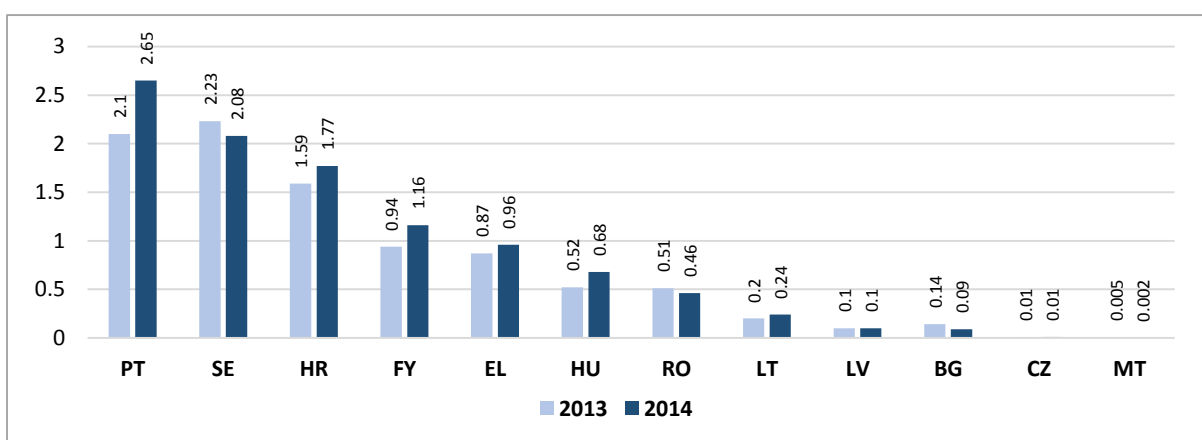
Figure 36 – Complaints received by NRAs about postal services per country per 10000 inhabitants, 2013-2014



Note: The number of complaints received by NRAs and the population per country are figured in the appendices as well as notes regarding NRAs particularities (annex 10.3.).

In turn, figure 37 shows complaints received by USPs about cross-border services per country per 1000 inhabitants. The complaints range in 2014 from 2,65 (Portugal) to 0,002 (Malta). In the majority of countries, the complaints on cross-border services have increased, when comparing to the 2012-2013 information.

Figure 37 – Complaints received by USPs about cross-border services per country per 1000 inhabitants, 2013-2014



Note: The number of complaints received by USPs and the population per country are included in the appendices (annex 10.4.).



6. Conclusions on the current practices of the NRAs regarding the quality of service regulation, complaint handling procedures and consumer protection

To ensure compliance with the obligations arising from the Postal Directives, two particular tasks are usually assigned to national regulatory authorities (NRAs):

- to follow-up on quality of service issues and end-user satisfaction
- to follow-up on complaint handling procedures and consumer protection.

In this report, the ERPG has collected core indicators and instruments to monitor the quality of service and end-user satisfaction, on the one hand, and complaint handling and consumer protection, on the other, linked back to regulatory measures taken in those fields.

The ERPG has also collected data regarding these core indicators and the report analyses the data, identifies trends on the market and describes the competence and current practices of NRAs.



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Terms and abbreviations

CEN – Comité Européen de Normalisation / European Committee for Standardisation

IPC – International Post Corporation

NA – Not available

NRA – National Regulatory Authority

OPSP.US – Other Postal Service Providers active in the Universal Service area

OPSP – Other Postal Service Providers

US – Universal Service

USP – Universal Service Provider

USO – Universal Service Obligation

X - Not applicable



Country codes and NRA acronyms

COUNTRY CODE	NRA ACRONYM
AT - Austria	RTR
BE - Belgium	BIPT
BG - Bulgaria	CRC
CH - Switzerland, Helvetia	POSTCOM
CY - Cyprus	OCECPR
CZ - Czech Republic	CTU
DE - Germany	BNETZA
DK - Denmark	TBST
EE - Estonia	ECA
EL - Greece	EETT
ES - Spain	CNMC
FI - Finland	FICORA
FR - France	ARCEP
FYROM - Former Yugoslavia Republic of Macedonia	AP
HR- Croatia	HAKOM
HU - Hungary	NMHH
IE - Ireland	COMREG
IS - Iceland	PFS



IT - Italy	AGCOM
LT - Lithuania	RRT
LU - Luxembourg	ILR
LV - Latvia	SPRK
MT - Malta	MCA
NL – The Netherlands	ACM
NO - Norway	NKOM
PL - Poland	UKE
PT - Portugal	ANACOM
RO - Romania	ANCOM
RS - Serbia	RATEL
SE - Sweden	PTS
SI - Slovenia	AKOS
SK - Slovakia	TELEOFF
UK – The United Kingdom	OFCOM



APPENDICES

Annex 1 – Methodology for each country for the measurement of quality of service of domestic services provided by USP in 2014

Services	Standards	Count	Country	%
Single piece priority mail	EN 13850	29	AT, BE, BG, CH, CY, CZ, DE, DK, EL, ES, FI, FR, HR, HU, IE, IS, IT, LT, LV, MT, NL, NO, PL, PT, RO, SE, SI, SK, UK	87,8
	Other	1	EE	3,4
Single piece non-priority mail	EN 13850	5	DK, FI, FR, LT, NO	36
	EN 14508	9	BE, BG, CH, HR, HU, PL, PT, SK, UK	64
Bulk mail	EN 14534	3	FR, HU, MT	100
Parcels	EN 13850	3	DK, NO, UK	23
	TR 15472	4	BE, MT, PL, SI	31
	Other	6	BG ⁵⁷ , CH, FR ⁵⁸ , HU, PT ⁵⁹ , RO ⁶⁰	46
Registered mail	EN 13850	3	AT, DE, LT	37,5
	TR 15472	1	BE	12,5
	EN 14508	1	SK	12,5
	EN 14137	1	MT	12,5
	Other	2	FR ⁶¹ , HU	25,0

⁵⁷ Using data from the date-stamp.

⁵⁸ Methodology based on a track and trace system, that may be audited.

⁵⁹ The measurement is based on a sample of real mail items (parcels), selected according to their real mail flows.

⁶⁰ Procedure established by the regulator.

⁶¹ Methodology based on a track and trace system, that may be audited.



Annex 2 – Number of force majeure days and reasons in 2014

Country	Number of days accepted by the NRA	Geographical area affected	Reasons	Number of days denied by the NRA
BE	5	- 2 national incidents - 3 regional incidents (2 or 3 provinces affected at a time)	Strikes	1
EL	7	National	Strikes	29
MT	0	-	-	1



Annex 3 – Data regarding quality of service measurement’s audit

3.1 Audit of measurement regarding transit time of single piece priority mail

	Who commissions or orders the measurement?	Is the measurement audited?	Who is responsible for ensuring the audit
AT	USP	Yes	NRA
BE	NRA	Yes	NRA
BG	NRA	No	-
CH ⁶²	NRA and USP	Yes	Independant organisation
CY ⁶³	USP	Yes	USP
CZ	USP	Yes	NRA
DE	Incumbent	Yes	Incumbent
DK	NRA	No	-
EE	USP	No	-
EL	NRA	Yes	NRA
ES	USP	Yes	NRA
FI	NRA	Yes	NRA and USP
FR	USP	Yes	NRA and USP
HR	USP	Yes	NRA
HU	USP	Yes	USP
IE	NRA	Yes	NRA
IS	-	Yes	NRA
IT	NRA	Yes	Third part
LT	USP	No	-
LU	USP	No	-
LV	USP	Yes	USP
MT	USP	Yes	NRA
NL	USP	Yes	USP
NO	USP	Yes	-
PL	NRA	Yes	NRA
PT	USP	Yes	NRA
RO	USP	Yes	USP
SE	USP	Yes	-
SI	USP	Yes	NRA
SK	USP	Yes	NRA
UK	USP	Yes	NRA and USP
Total of “yes”	-	26/31	-

Note: considering countries for which single piece priority mail is applicable and which have a measurement.

⁶² The NRA grants an approval.

⁶³ The NRA makes sure the measurement and the audit are done in accordance with the EN 13850.



3.2 Audit of measurement regarding transit time of single piece non-priority mail

	Who commissions or orders the measurement?	Is the measurement audited?	Who is responsible for ensuring the audit
BE	NRA	Yes	NRA
BG	NRA	No	-
CH ⁶⁴	NRA and USP	Yes	Independent organisation
DK	NRA	No	-
FI	NRA	Yes	NRA and USP
FR	USP	Yes	NRA and USP
FY	USP	No	-
HR	USP	Yes	NRA
HU	USP	Yes	USP
IS	NRA	Yes	-
LT	USP	No	-
LU	USP	No	-
LV	NRA	Yes	NRA
NO	USP	Yes	-
PL	NRA	Yes	NRA
PT	USP	Yes	NRA
RS	USP	No	-
SK	USP	Yes	NRA
UK	USP	Yes	NRA and USP
Total of "yes"	-	13/19	-

Note: considering countries for which single piece non-priority mail is applicable and which have a measurement.

⁶⁴ The NRA grants an approval



3.3 Audit of measurement regarding transit time of registered mail

	Who commissions or orders the measurement?	Is the measurement audited?	Who is responsible for ensuring the audit
AT	USP	Yes	NRA
BE	NRA	Yes	NRA
DE	Incumbent	Yes	Incumbent
FR	USP	No	-
HU	USP	Yes	USP
IT	NRA	No	USP
LT	USP	No	-
LU	USP	No	-
MT	USP	Yes	NRA
SK	USP	Yes	NRA
UK	USP	Yes	NRA and USP
Total of "yes"	-	7/11	-

Note: considering countries for which registered mail is applicable and which have a measurement



3.4 Audit of measurement regarding transit time of single piece parcels

	Who commissions or orders the measurement?	Is the measurement audited?	Who is responsible for ensuring the audit
AT	USP	Yes	NRA
BE	NRA	Yes	NRA
BG	USP	No	-
CH	NRA and USP ⁶⁵	Yes	USP and an independent organisation
DE*	-	-	-
DK	NRA	No	-
ES	USP	Yes	NRA
FR	USP	No	-
FY	USP	No	-
HU	USP	Yes	USP
IT	NRA	No	USP
LT*	-	-	-
LV	NRA	Yes	NRA
MT	USP	No	-
NO	USP	Yes	-
PL	NRA	Yes	NRA
PT	USP	Yes	NRA
RO	USP	Yes	USP
RS*	-	-	-
SI	USP	Yes	NRA
SK	USP	Yes	-
UK	USP	Yes	NRA and USP
Total of "yes"	-	13/22	-

Note: considering countries for which single piece parcels are applicables and which have a measurement

* There is regulatory objectives but no measurement.

⁶⁵ The NRA grants an approval



Annex 4 – Derogation in frequency

1. Croatia: According to the Croatian PSA (Postal Service Act) reasons for the exceptions to the guaranteed frequency of delivery are determined in Article 35. of Ordinance on the provision of universal service. This way, the universal service provider are obliged to perform, among others things, the delivery of postal items on the whole territory of Croatia with exceptions: up to 10% of the total number of Croatian households, according to the official results of the census in Croatia; delivery in specific geographical area in Croatia: mountain areas, islands and area with the extremely harsh conditions of access); delivery of ordinary letters and notification of the arrival for postal items are done through collective post-boxes. Also, the universal service provider are obliged to deliver to the Croatian NRA (HAKOM) the list of all the variance in the performance of universal postal services (including delivery) on the grounds of compliance with Ordinance on the provision of universal service. At present, the NRA doesn't have a list of these exceptions.

2. Denmark: In accordance with the Postal Services Directive and pursuant to Article 15 of the Danish Postal Service Act of 2010, the Danish National Regulatory Authority (the National Transport Authority), has stipulated that the permanent inhabitants of a number of small Danish islands (approximately 7-8 islands) will have to pick up their postal items - letters and parcels - at a central location on the mainland (typically in the ferry port). The inhabitants receive compensation from the universal service provider for this derogation from the universal service. As a principle, the limit is set at 10 permanent inhabitants but 3-4 small islands with a population below 10 permanent inhabitants are subject to more individual arrangements such as the delivery of postal items in a letter box in the ferry port or delivery to the homes of the inhabitants by the boatman or by one of the inhabitants (for which he will be compensated). For all other Danish islands with daily boat or ferry service and with more than 10 permanent inhabitants, postal items are carried to the island on a daily basis Monday through Saturday and delivered to the homes of the inhabitants. The service requirement for domestic parcels is day-to-day delivery Monday through Friday between all Danish cities, except for parcels to the Danish island of Bornholm (in the Baltic Sea) where an extra day must be expected for delivery.

3. Greece: The list of settlements located in areas that are excluded due to special geographical peculiarities is formed by a 3 members committee where one member is from the Ministry of Infrastructure, Transport and Networks, one member from the Greek NRA (EETT) and one member from the USP. The proposed settlements that are excluded from the quality measurements once evaluated and approved by the Minister of Infrastructure, Transport and Networks are included in annexes to the USP's Management Contract between the USP and the Ministry of Infrastructure, Transport and Networks. The list is published on the Internet.

4. Ireland: The reasons provided by the USP for each of the derogations sought were; the low demand on these days and postal service users have alternative methods of communications, many businesses are closed/inaccessible on these days and services were not provided previously on those days, and finally there would be significant costs to provide the services now. By way of consequence ComReg has granted a derogation from the universal postal service for the following working days: a full derogation for Mondays following a public holiday which falls on a Saturday or Sunday, a full derogation for the first working day after 26 December (St. Stephen's Day), a derogation for collections only on 24 December and a part derogation for Good Friday.



5. Slovenia: This reason can produce permanent or temporary effects. **Permanent** exceptions to delivery in the case of difficult access to the addressee may be determined in the following cases: If the apartment, individual dwelling house or business premise user of the user of postal services from the nearest public road is more than 200 m and access to it is not possible with a suitable vehicle, namely, every day of the year; If the apartment, individual dwelling house or business premise of the user of postal services from the nearest public road is more than 2000 m, access to it is possible with a suitable vehicle, namely, every day of the year; If the access to user premises is only possible with the passage of land privately owned by a third party which does not allow passage. The distance mentioned above is measured from the nearest public road, and the shortest path to which is added a supplement to the height difference, so that above 100 m of altitude for every 100 m difference in altitude 1000 m routes added or proportionate share. **Temporary** exceptions to delivery within the framework of the implementation of the universal postal service in the case of difficult access to the addressee are determined in the event of a public road or path to the addressee temporarily impassable (under construction or damaged), if there are temporary physical barriers preventing access to the house letterbox or addressee or, if the weather and other hydro-meteorological and geophysical natural catastrophes do not allow service and delivery (force majeure). **Permanent exceptions** for delivery because of care for health and safety of the deliverer is determined if a public road or path to the addressee is in such bad shape that it represents a threat to the deliverer's health or safety. **Temporary exemptions** from the service and delivery because of care for the health and safety of the deliverer are determined in the case of dangerous animals, violent behaviour to the deliverer or temporary threatening physical access barriers to home letterbox or destination. Also, the temporary exceptions to delivery because of care for health and safety of the deliverer may be determined in the case of temporarily blocked public roads or snow-covered or icy road, flooded roadway, fire and other similar causes on which the postal provider has no influence. The NRA has not defined a list of settlements located in exceptional geographical conditions, but has a detailed list of households facing such circumstances. The list in case is updated monthly or immediately if there are some bigger events of natural disasters.

6. Spain: As is stipulated in the Spanish law: "Deliveries shall take place at least every working day, from Monday to Friday, **except in the case of special geographical circumstances or conditions**, in accordance with the provisions of this Act and its implementing regulations. Notably, a delivery shall be made at suitable installations which are different to the postal address, following authorisation by the National Postal Sector Commission (now CNMC), when there is concurrence of the conditions set out in the implementing regulations of the present Act, in accordance with the provisions of Directive 97/67/CE. For the purposes of the preceding paragraph, zones of low population density, which shall not include rural zones, shall be duly defined."

7. UK: The number of exceptions are published on Royal Mail's website annually (this does not include individual addresses). The document published by Royal Mail lists the categories of special circumstances for derogation by the rule stipulated in the universal service obligations: ex. health and safety, difficulty of access: http://www.royalmailgroup.com/search/google_cse_adv/exceptions. The list is refreshed annually.



Annex 5 – Results of the “consumer satisfaction” survey published by the NRA

<p>Belgium</p> <p>http://www.bipt.be/en/operators/postal/universal-and-non-universal-postal-services/opinion-of-the-bipt-council-of-6-october-2015-regarding-the-2014-improvement-plan-and-the-2015-action-plan-of-bpost-following-the-2014-customer-satisfaction-survey</p>
<p>FYROM</p> <p>http://www.ap.mk/mk/za-nas-2/izvestai/345-zadovolstvo2012</p>
<p>Ireland</p> <p>Postal Market Business and Residential Surveys</p> <p>http://www.askcomreg.ie/post/market_research.99.LE.asp</p>
<p>Lithuania</p> <p>http://rrt.lt/lt/vartotojai_71/paslaugos_teikejai/rrt-uzsakymu-atliktu-a32g.html (only in Lithuanian)</p>
<p>Malta</p> <p>http://www.mca.org.mt/service-providers/surveys/postal-services-household-survey-results</p> <p>http://www.mca.org.mt/service-providers/surveys/mca-survey-results-local-postal-services-0</p> <p>http://www.mca.org.mt/surveys/postal-services-large-bulk-mailers-survey-results</p>
<p>Portugal</p> <p>The latest results (field work – December 2014) are available at the following link:</p> <p>http://www.anacom.pt/render.jsp?contentId=1351517&languageId=1#.VVtIfIJIV</p>
<p>Slovakia</p> <p>http://www.teleoff.gov.sk/index.php?ID=8841</p>
<p>Slovenia</p> <p>http://www.akos-rs.si/raziskave-o-zadovoljstvu-uporabnikov</p>
<p>Sweden</p> <p>http://www.pts.se/upload/Rapporter/Post/2014/Befolkningens_anvandning_av_posttjanster_ar_2014_PTS-ER-2014-9.pdf</p>
<p>UK</p> <p>http://stakeholders.ofcom.org.uk/market-data-research/statistics/</p>



Annex 6 – Results of the “consumer satisfaction” survey published by the USP

Denmark

For 2014: <http://www.postdanmark.dk/da/Om%20os/Kvalitet/Kunder/Sider/Kundetilfredshed.aspx>



Annex 7 – Results of the “customer needs” survey published by the NRA

<p>Belgium</p> <p>They are published on a three-yearly basis.</p> <p>http://www.ibpt.be/en/operators/postal/universal-and-non-universal-postal-services/communication-of-17-december-2013-of-the-bipt-council-regarding-the-results-of-the-survey-of-july-august-2013-related-to-the-behaviour-and-priorities-of-private-and-business-users-about-the-universal-postal-service-in-belgium</p>
<p>Cyprus</p> <p>http://www.ocepr.org.cy/media/documents/General/PS_Report_PresentationConsumers_GR_05-03-2012_PT.ppt</p>
<p>Ireland</p> <p>Postal Market Business and Residential Surveys</p> <p>http://www.askcomreg.ie/post/market_research.99.LE.asp</p>
<p>Lithuania</p> <p>http://rrt.lt/lt/vartotojai_71/paslaugos_teikejai/rrt-uzsakymu-atliktu-a32g.html (only in Lithuanian)</p>
<p>Malta</p> <p>http://www.mca.org.mt/service-providers/surveys/postal-services-household-survey-results</p> <p>http://www.mca.org.mt/service-providers/surveys/mca-survey-results-local-postal-services-0</p> <p>http://www.mca.org.mt/surveys/postal-services-large-bulk-mailers-survey-results</p>
<p>Portugal</p> <p>The most recent results (field work – December 2014) are published in the following link:</p> <p>http://www.anacom.pt/render.jsp?contentId=1351517&languageId=1#.VVtIFIJIV.</p>
<p>Republic of Serbia</p> <p>http://www.rapus.rs/o-nama/projekti</p>
<p>Slovenia</p> <p>http://www.akos-rs.si/raziskave-o-zadovoljstvu-uporabnikov</p>
<p>UK</p> <p>http://stakeholders.ofcom.org.uk/consultations/review-of-user-needs/</p>



Annex 8 – Results of the “customer needs” survey published by the USP

Switzerland

<https://www.post.ch/en/post-startseite/post-konzern/post-medien/post-archive/2014/post-mm14-kundenumfrage/post-medienmitteilungen.htm>



Annex 9 – Compensation schemes for individual customers

Countries that have compensation schemes for individual customers⁶⁶

	Universal Service Provider	Other Postal Service Providers active in the Universal Service area	Other Postal Service Providers
Item lost or substantially delayed	BG, DK, EE, EL, ES, FI, FR, FY, HR, HU, IE, IT, IS, LT, LU, LV, MT, NO, PL, PT, RO, RS, SI, SK, UK	BG, EE, EL, FR, FY, HR, HU, IE, IT, LT, LU, LV, PL, RO, SI, SK	BG, EE, EL, FI, FR, FY, HR, HU, IE, IT, LT, LV, PL, RO, RS, SI, SK
Item arriving late	BG, DK, FI, FR, FY, HR, IE, IT, HU, LU, NO, PL, PT, RS, SI, UK	BG, FI, FR, FY, HR, HU, IE, IT, LU, PL, SI	BG, FI, FR, FY, HR, HU, IE, IT, PL, RS, SI
Item damaged	BG, DK, EE, EL, ES, FI, FR, FY, HR, HU, IE, IT, IS, LT, LU, LV, MT, NO, PL, PT, RO, RS, SI, SK, UK	BG, EE, EL, FI, FR, FY, HR, HU, IE, IT, LU, LV, PL, RO, SI, SK	BG, HR, EE, EL, FI, FR, FY, HU, IE, IT, LT, LV, PL, RO, SI, RS, SK
Change of address	IE	IE	IE
Mail delivery or collection	IE, IT	IE, IT	IE, IT
Mis-delivery	ES, IE, IT, SI, PT, RS	IE, IT, SI	IE, IT, RS, SI
How complaints are treated	IE, IT, PL, SI	IE, IT, PL, SI	IE, IT, PL, SI
Other	BG, IE, RO	BG, IE, RO	BG, IE, RO

⁶⁶ NRAs notes:

BG/RO: "Other" - Stolen item.

HU: "Item arriving late" - only for time-guaranteed services.

IE: Where there has been any loss, theft, or damage to a postal packet, or a failure to provide a postal service of sufficient quality, then the postal service provider concerned will, at a minimum, place the postal service user in the position which he, she or it would have been in had there been no such loss, theft, or damage to the postal packet or had there been no failure to provide a postal service of sufficient quality, subject to any force majeure having occurred and excluding all consequential losses. See: [ComReg Document 14/06](#).

FI: Letter mail only.

LT: There are no specific requirements for compensation scheme of substantially delayed postal items.

PT: For the USP, existing compensations schemes derive from the regime established by articles 77 to 83 of Decree-Law no. 176/88, of 18 May, which approves the Regulation for Public Postal Service, referring to registered mail, to mail with declared value and parcels. For other postal services there is no specific legal regime applicable.



Annex 10 – Data on complaints

10.1 NRAs that collect data on the number of complaints received by postal service providers⁶⁷

		Universal Service Provider		Other Postal Service Providers active in the Universal Service area		Other Postal Service Providers	
		Yes	No	Yes	No	Yes	No
About Universal Services	Total	AT, BG, CH, CY, CZ, DK, EE, EL, ES, FI, FR, FY, HR, HU, IE, IT, LT, LU, LV, MT, NO, PL, PT, RO, RS, SE, SI, SK, UK	BE, DE, IS, NL	BG, CY, EL, FY, HU, IT, LU, LT, PL, SI, RO	AT, BE, CH, CZ, DE, DK, EE, ES, FR, HR, IE, IS, LV, MT, NO, UK		
	Category	CH, CZ, DK, EL, ES, FI, FR, FY, HR, IE, IT, LT, MT, NO, PL, PT, RO, RS, SE, SI, SK, UK		EL, FY, IT, PL, RO, SI			
	Service	CH, DK, EL, ES, FI, FR, FY, HR, LT, IT, PT, RO, RS, SE, UK		FY, IT, PL, RO			
About Non-Universal Services	Total	BG, CY, CZ, EL, FY, HU, IT, LT, LU, LV, PL, RO, RS, SE, SK, UK	AT, BE, DE, DK, EE, ES, FR, HR, IE, IS, MT, NL, NO, SI	BG, CY, CZ, EL, FY, HU, IT, LT, PL, RO, RS, SI, SK	AT, BE, DE, DK, EE, ES, FR, HR, IE, IS, LU, LV, MT, NL, NO, UK	BG, CY, CZ, EL, FY, HU, IT, LT, PL, RO, RS, SI, SK	AT, BE, DE, DK, EE, ES, FR, HR, IE, IS, LU, LV, MT, NL, NO, UK
	Category	CZ, EL, FY, IT, LT, PL, RO, RS, SE, SK, UK		CZ, EL, FY, IT, PL, RO, RS, SI, SK		CZ, EL, FY, IT, PL, RO, RS, SI, SK	
	Service	EL, FY, IT, LT, RO, RS, UK		FY, IT, PL, RO, RS		FY, HU, IT, RO, RS	

⁶⁷ NRAs notes:

BG: Data on the number of complaints are according to cause.

HU: Only the USP is active in the US area market segment. Besides the USO services it also provides substituting US services as it would be a competitor of itself without any obligation. The complaints data on substituting US services was summed with complaints data of services provided on obligation (USO) for the goals of this questionnaire.

IE: The NRA does not hold data for complaints to the USP, but relies on the information on complaints published by the USP in its annual report.

LT: Postal service providers, active in the universal area (other than USP) provide aggregated data on the number of complaints of all postal services. They do not distinguish between complaints about universal service and non-universal services.

PL: Complaints are classified by some general types of service/segments of the market – as universal services, falling within the scope of universal services, courier services and other services (direct mail, postal money orders etc.).

PT: The data refers to answered complaints by the USP.



10.2 Complaints received by USPs about universal service per country per 1000 habitants, 2013-2014^{68/69}

	2013			2014		
	USP complaints	Population	Complaints per 1000 habitants	USP complaints	Population	Complaints per 1000 habitants
Austria	194815	8451860	23,05	205572	8506889	24,17
Bulgaria	996	7284552	0,14	685	7245677	0,09
Croatia	30105	4262140	7,06	30574	4246809	7,20
Cyprus	22	865878	0,03	-	-	-
Czech Republic	105638	10516125	10,05	115419	10512419	10,98
Denmark	25814	5602628	4,61	16011	5617345	2,85
Estonia	-	-	-	374	1315819	0,28
France	889833	65560721	13,57	873834	65835579	13,27
FYROM	3521	2062294	1,71	4752	2065769	2,30
Greece	10886	10991400	0,99	12618	10926807	1,15
Hungary	24219	9908798	2,44	21854	9877365	2,21
Ireland	25815	4591087	5,62	22290	4605501	4,84
Italy	55.025	59685227	0,92	85230	60782668	1,40
Latvia	777	2023825	0,38	779	2001468	0,39
Lithuania	1760	2971905	0,59	2050	2943472	0,70
Luxembourg	2903	537039	5,41	4321	549680	7,86
Malta	1424	421364	3,38	1116	425384	2,62
Norway	69665	5051275	13,79	63811	5107970	12,49
Poland	133894	38062535	3,52	172633	38017856	4,54
Portugal	54056	10487289	5,15	58276	10427301	5,59
Romania	12910	20095996	0,64	10851	19947311	0,54
Serbia	7673	7181505	1,07	11162	7146759	1,56
Sweden	71929	9555893	7,53	67398	9644864	6,99
Slovakia	51607	5410836	9,54	46046	5415949	8,50
Slovenia	1.902	2058821	0,92	-	-	-
Spain	65.913	46727890	1,41	77103	46512199	1,66
United Kingdom	484980	63905297	7,59	486336	64308261	7,56

⁶⁸ NRAs notes:

BG: Number of justified complaints.

ES: These data include complaints about USO products and complaints about services. The last type of complaints is for services in general and it is not possible to split in USO and not USO. The 2013 data have been changed from the data provided last year because we have excluded the complaints of non-USO products.

IE: These complaint statistics only relate to written complaints received and do not include complaints received by phone or email. An Post advised in its 2014 Annual report: "In 2014, there were 534,354 telephone calls made to An Post Customer Services. Most of these were routine or general enquiries rather than complaints."

FR: Since 2009, the system in place ensures a better accounting of complaints submitted by customers thanks to a systematic recording. Beside this, the USP systematically provides a compensation when parcels are not delivered within D+2, which encourages postal users to complain.

PT: The values refer to answered complaints.

⁶⁹ The information on the population of each country that was used is available at <http://ec.europa.eu/eurostat/tgm/table.do?tab=table&init=1&language=en&pcode=tps00001&plugin=1>. For this report it was last collected on 1 October 2015.



10.3 Complaints received by NRAs about postal services per country per 10000 inhabitants, 2013-2014^{70/71}

	2013			2014		
	NRA complaints	Population	Complaints per 10000 inhabitants	NRA complaints	Population	Complaints per 10000 inhabitants
Austria	69	8451860	0,08	94	8506889	0,11
Bulgaria	127	7284552	0,17	117	7245677	0,16
Croatia	46	4262140	0,11	58	4246809	0,14
Cyprus	4	865878	0,05	6	858000	0,07
Czech Republic	164	10516125	0,16	272	10512419	0,26
Denmark	115	5602628	0,21	205	5627235	0,36
Estonia	62	1320174	0,47	53	1315819	0,40
France	71	65560721	0,01	42	65835579	0,01
FYROM	-	-	-	11	2065769	0,05
Germany	1228	80523746	0,15	2335	80767463	0,29
Greece	203	10991400	0,18	168	10926807	0,15
Hungary	87	9908798	0,09	249	9877365	0,25
Italy	353	59685227	0,06	115	60782668	0,02
Latvia	17	2023825	0,08	25	2001468	0,12
Lithuania	82	2971905	0,28	58	2943472	0,20
Luxembourg	-	-	-	2	549680	0,04
Malta	12	421364	0,28	10	425384	0,24
Portugal	304	10487289	0,29	331	10427301	0,32
Romania	32	20095996	0,02	92	19947311	0,05
Slovakia	77	5410836	0,14	32	5415949	0,06
Spain	173	46727890	0,04	200	46512199	0,04
United Kingdom	385	63905297	0,06	271	64308261	0,04

⁷⁰ The information on the population of each country that was used is available at <http://ec.europa.eu/eurostat/tgm/table.do?tab=table&init=1&language=en&pcode=tps00001&plugin=1>. For this report it was last collected on 1 October 2015.

⁷¹ NRAs notes:

PT: ANACOM also receives complaints that are submitted to postal service providers through a legally established “complaints book”, available on all postal service providers’ establishments. These complaints have to, submitted to penalty, be sent to the NRA.

RO: A special case is represented by the national regulatory authority in Romania: ANCOM receives complaints from users on postal services, but it has not attribution for de facto settlement of the users’s claims. The petitions are solved by informing users regarding their rights etc. and are also considered in the proces of planning future controls etc.

UK: Ofcom does not have regulatory responsibility for handling and dealing with postal complaints from individual consumers. Ofcom does, however, respond to complaints referred to it in cases where the postal operator has failed to resolve the complaint or where the complaint may potentially suggest there is a wider or more significant issue that may require regulatory intervention. The above figures represent those directly received by the NRA from consumers as opposed to the total number of consumer complaints received by the USP.



10.4 Complaints received by USP about cross-border services per country per 1000 inhabitants, 2013-2014^{72/73}

	2013			2014		
	USP complaints	Population	Complaints per 1000 inhabitants	USP complaints	Population	Complaints per 1000 inhabitants
Bulgaria	984	7284552	0,14	675	7245677	0,09
Croatia	6773	4262140	1,59	7518	4246809	1,77
Czech Republic	109	10516125	0,01	148	10512419	0,01
FYROM	1940	2062294	0,94	2392	2065769	1,16
Greece	9596	10991400	0,87	10467	10926807	0,96
Hungary	5158	9908798	0,52	6759	9877365	0,68
Latvia	202	2023825	0,10	197	2001468	0,10
Lithuania	595	2971905	0,20	716	2943472	0,24
Malta	2	421364	0,00	1	425384	0,002
Portugal	22029	10487289	2,10	27673	10427301	2,65
Romania	10284	20095996	0,51	9287	19947311	0,46
Sweden	21331	9555893	2,23	20062	9644864	2,08

⁷² NRAs notes:

BG: Number of justified complaints.

CZ: Regarding other postal providers we do not distinguish, if the complaints concern US or other services.

HU: Only about US because the USP did not report separated cross-border data about its non-US services but only total figure of non-US complaints.

PT: The values refer to answered complaints by the USP and only to universal services.

⁷³ The information on the population of each country that was used is available at <http://ec.europa.eu/eurostat/tgm/table.do?tab=table&init=1&language=en&pcode=tps00001&plugin=1>. For this report it was last collected on 1 October 2015.