



FLASH OF THE ERGP REPORT N QUALITY OF SERVICE, CONSUMER PROTECTION AND COMPLAINT HANDLING – AN ANALYSIS OF TRENDS¹

I. BACKGROUND

National Regulatory Authorities (NRAs) have to ensure compliance with the obligations arising from the 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.

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 consumer protection and complaint handling, to ensure that consumers are protected in accordance with the provisions of the Directive.

The report is based on the replies received from the 33 ERGP members to a questionnaire requesting data for 2016 on quality of service and end-user satisfaction, including consumer protection and complaint handling. This ERGP report describes the current practices of NRAs regarding two components, namely quality of service and end-user satisfaction on the one hand and consumer protection and complaint handling on the other.

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, regularity and reliability of services;
2. collection and delivery;
3. access points;
4. measurement of consumer satisfaction;
5. surveys regarding customers' needs.

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

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

The objective of this flash is to highlight some of the key findings of the report, regarding quality of service, consumer protection and complaint handling.

¹ Please note that the flash does not substitute the report, which includes the methodological, additional notes and references to specific national circumstances. Therefore, you should always refer to the report to have a complete picture regarding quality of service, consumer protection and complaint handling and also to the related footnotes notes. The report is available at <http://ec.europa.eu/growth/sectors/postal-services/ergp>.



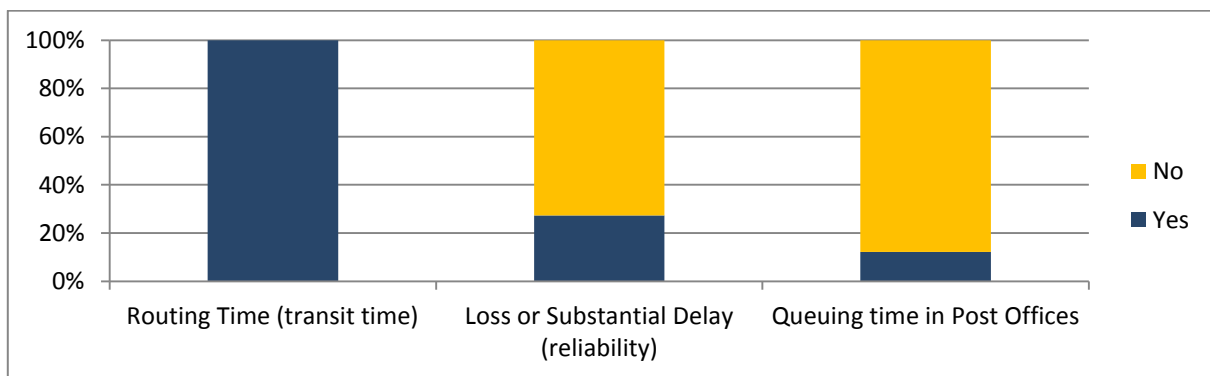
II. CURRENT SITUATION REGARDING QUALITY OF SERVICE AND END-USER SATISFACTION

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

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

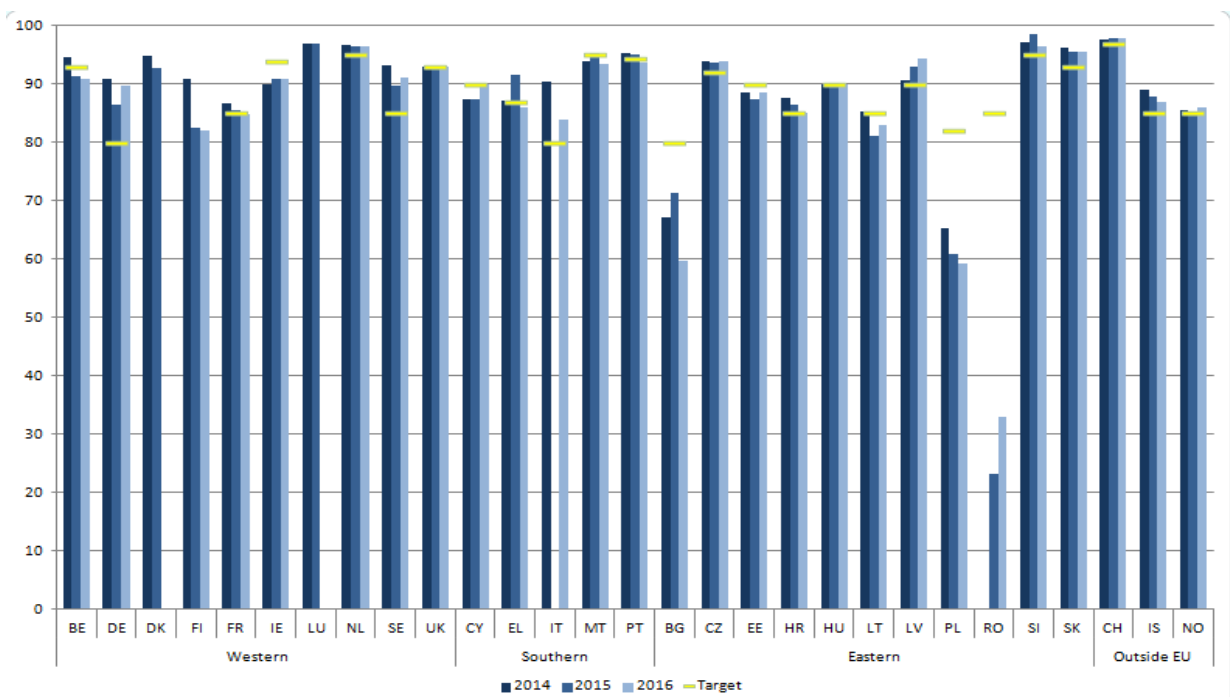
Figure below indicates that all 33 ERGP members (100% of the respondents) define regulatory objectives which deal with universal services regarding transit time. Also 9 countries (27%) have some kind of regulatory objectives regarding loss or substantial delay and 4 countries (12%) have regulatory objectives regarding queuing time in post offices.

Figure 1 – Regulatory objectives in 2016



The figure below shows that, in 2016, 17 of the 27 countries which provided their targets and results regarding D+1 delivery achieved their target, while 10 countries did not. Among the 27 countries which provided their results for 2014, 2015 and 2016 (D+1), 18 recorded a progress (or stability) in their transit time quality while 9 recorded a decrease.

Figure 2 – Targets (2016) and results (2014, 2015 and 2016) regarding D+1 delivery of single piece priority mail

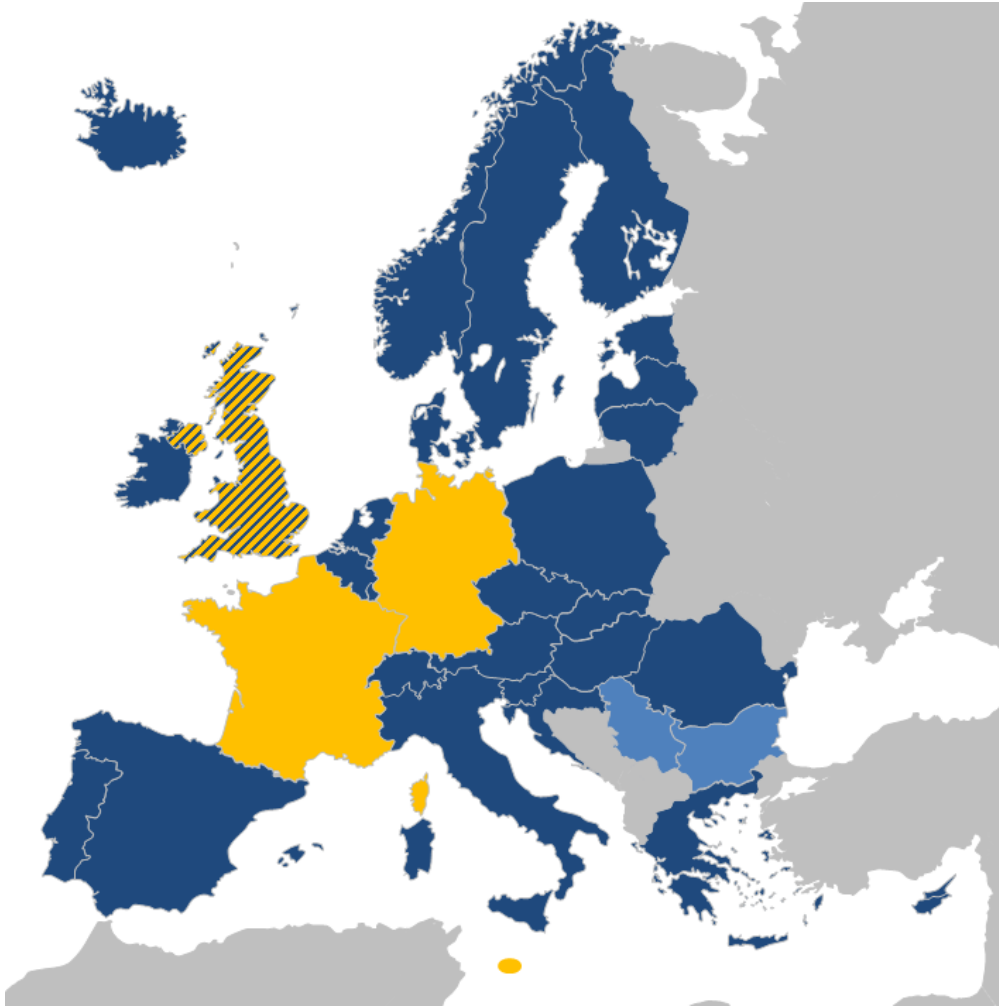




2. Collection and delivery

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). The information on delivery is shown in the figure below.

Figure 3 – Frequency of delivery in Europe in 2016



- 1 Collection / day / 5 days a week, namely Austria, Belgium, Croatia, Cyprus, the Czech Republic, Denmark, Estonia, Greece, Spain, Finland, Hungary, Ireland, Iceland, Italy, Lithuania, Latvia, Luxembourg, The Netherlands, Norway, Poland, Portugal, Romania, Sweden, Slovenia, Slovakia, Switzerland, the UK (for parcels) but in reality Royal Mail provides a 6-day-a-week service for parcels
- 1 Collection / day / 6 days a week, namely Germany, France, Malta, the UK (6 days for correspondence)
- Combination of 5 and 6 collection days a week, namely Bulgaria (6 days for Sofia), Serbia

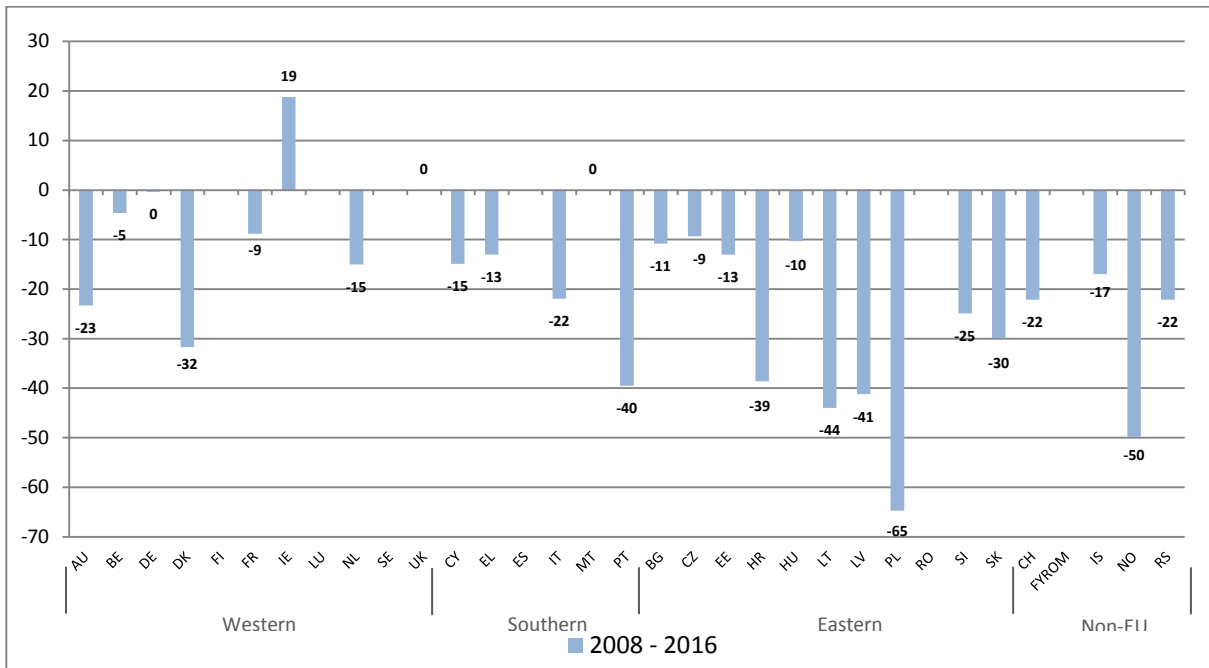
Nonetheless, many countries have granted exceptions regarding frequency of collection and in particular delivery. Responses revealed that these exceptions are mainly related to mountain areas, insularity, population density, low traffic volume, poor infrastructure, cost of service and extreme weather conditions.



3. Access points

The access point is a rather sensitive issue and this is reflected by the fact that a vast majority of the countries (30 out of 33 countries) deem it necessary to have requirements or standards to ensure an adequate number of collection letterboxes and points of contact/postal establishments. We have collected information regarding the evolution of number of collection of letter boxes and point of contacts since 2008. In figure below you may find the percentage change in the number of collection letterboxes since 2008.

Figure 4 – Percentage change in the number of collection letterboxes per countries in 2016 compared with the situation in 2008



Regarding collection letterboxes we notice in all countries, except one, a significant decrease in the number of collection letterboxes during the last 8 years. Concerning the points of contact, we notice that there are different types of points of contact at the European level but the most common is still the permanent post office managed by the USP with a full range of services followed by the post agency managed by a third party.

4. Measurement of consumer satisfaction

According to the responses to the 2016 questionnaire, around 39% of the NRAs monitor indicators of consumer satisfaction in their country and almost all of these publish the respective results. The results from the 2016 questionnaire show that 36% of the USPs in Europe conduct studies regarding the level of consumer satisfaction and publish the results.

5. Surveys regarding customer needs

In terms of measuring consumers' needs and market surveys, 52% of the NRAs indicated that they conduct such surveys, and most of them publishing the results. Only 18% of NRAs indicated that the USP conducts surveys regarding customers' needs, but the large majority of respondent NRAs do not have information regarding this issue from their USP.



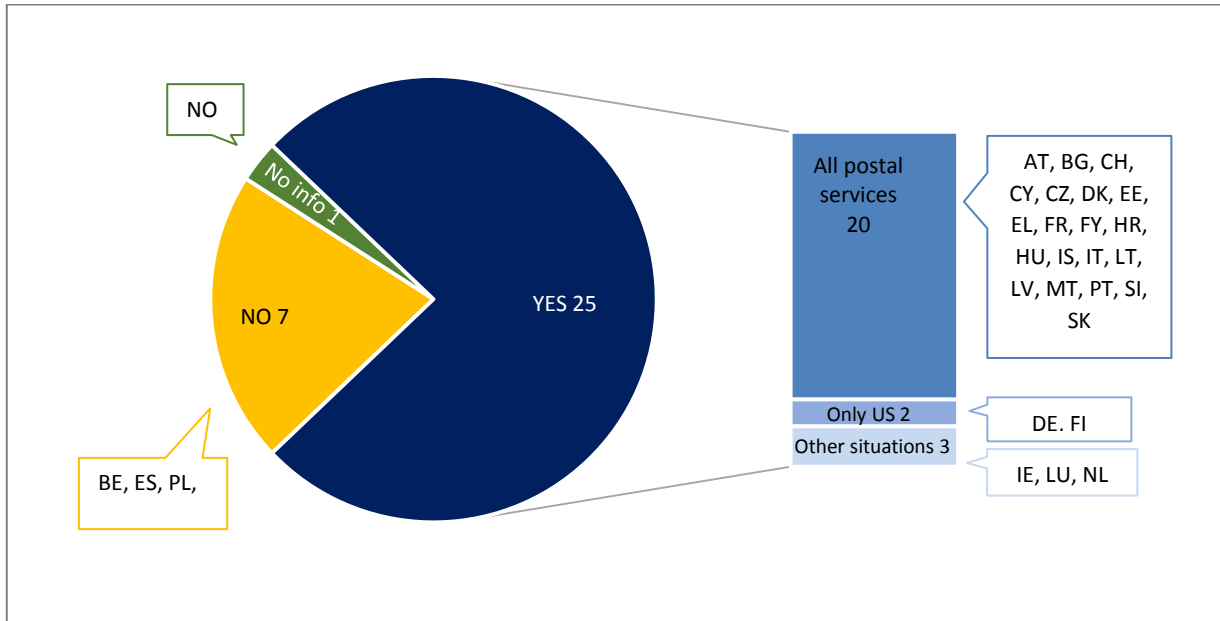
III. Current situation regarding complaint handling and consumer protection

The report looks into five key issues in the field of complaint handling and consumer protection, namely:

1. Competence of NRAs regarding complaint handling

Figure below indicates that the large majority of countries (25 out of 33 or 78%), NRAs have this competence, most of which covering complaints about all postal services. In almost all of the countries where NRAs are responsible for dealing with users' complaints, the NRAs have procedures in place to resolve those complaints.

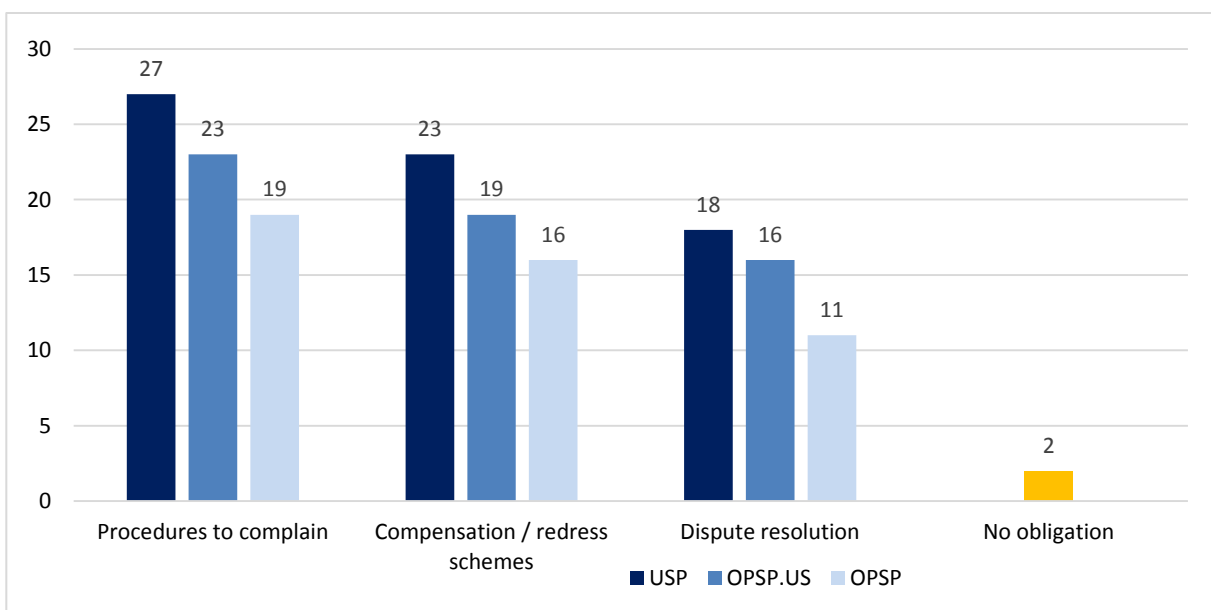
Figure 5 – NRAs dealing with users' complaints in 2016



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

Figure below indicates that the majority of countries had obligations in place for postal service providers to publish information regarding complaint procedures, compensation schemes and dispute resolution (usually on the providers' website, access points, general terms and conditions), covering the USP in most situations.

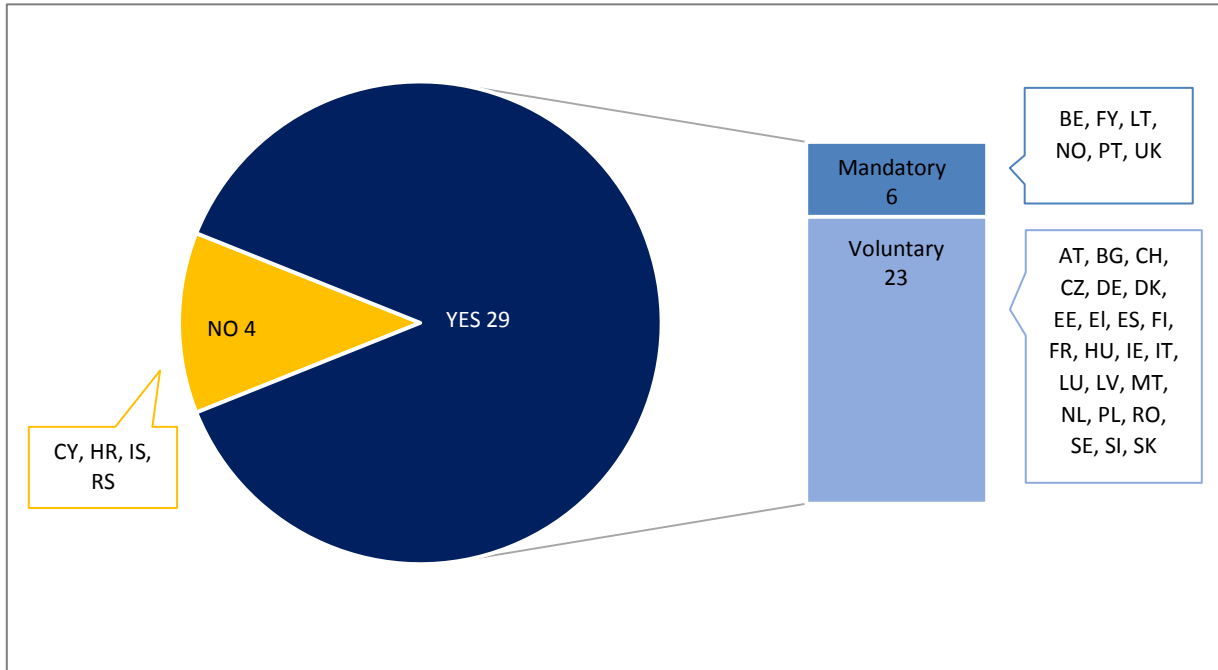
Figure 6 – Obligations to provide information about complaints handling in 2016





The figure below indicates whether Alternative Dispute Resolution (ADR) is available and if so, which kind. The majority of countries have ADR. This can be either general or specific to the postal sector. ADR is voluntary in 23 countries and mandatory in 6 countries. For the last three years the number of countries where alternative (or out-of-court) dispute resolution mechanisms are available to consumers has been increasing from 22 in 2014 to 29 in 2016.

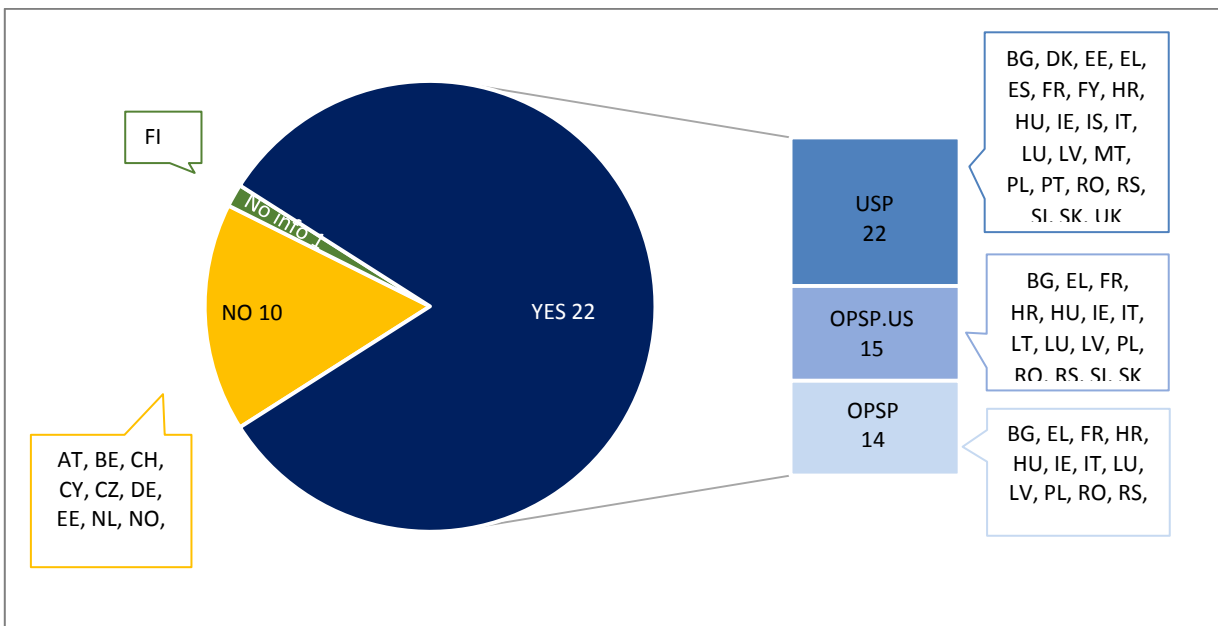
Figure 7 – Alternative (or out-of-court) Dispute Resolution (ADR) in 2016



3. Compensation schemes for individual customers

Regarding the scope of existing compensation schemes, most countries (22 out of 33 or 67%) have an obligation for a specific compensation scheme which concerns the USP. This also extends to other postal service providers in 14 countries.

Figure 82 – Mandatory compensation schemes for individual customers in 2016

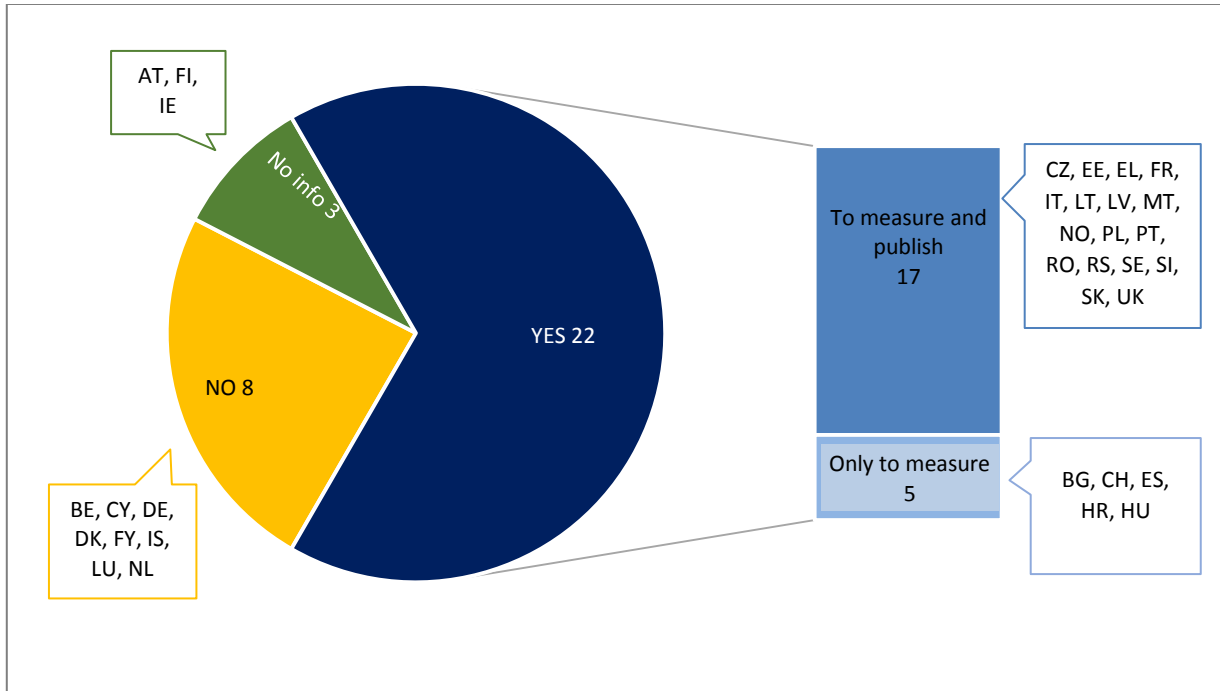




4. Indicators on complaints

This new subchapter focuses on the measurement and publication of complaints handling indicators by the USP, analysing existing obligations and their scope. In the majority of countries (22 out of 33 or 67%), USPs are obliged to measure and/or publish indicators on the complaints they receive. This obligation is normally set by the postal law, but in some cases is derived from licence conditions or NRAs determinations.

Figure 9 – Obligation to measure and publish indicators on complaints in 2016



5. Collection of data on complaints by NRAs

Here we look at the data NRAs are collecting on the number of complaints about postal services in general and, in particular, about cross-border services. The figure below shows the complaints received by USPs about universal service per country per 1000 inhabitants. The complaints rate ranged in 2016 from 23,02 (Iceland) to 0,06 (Serbia).

Figure 10 – Complaints received by USPs about universal service per country per 1,000 inhabitants, 2014-2016

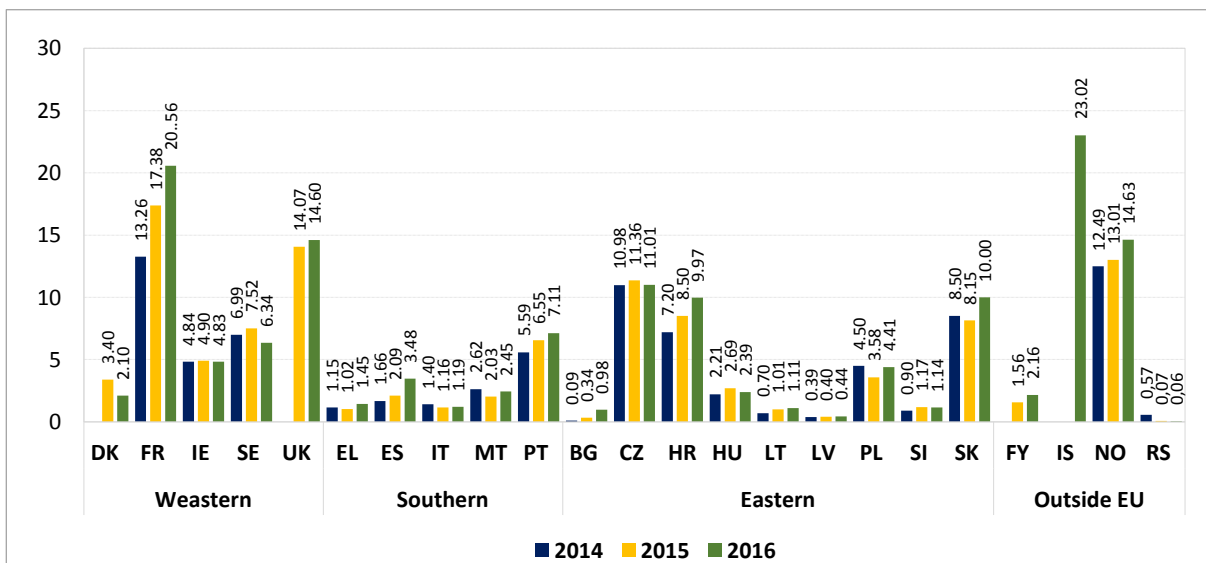
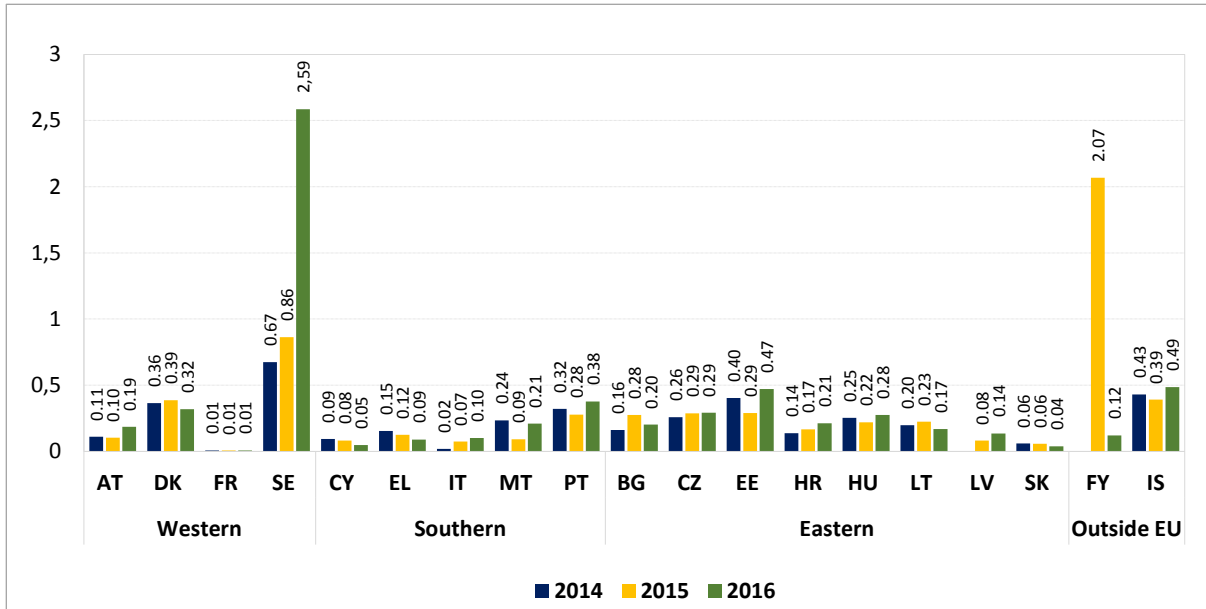




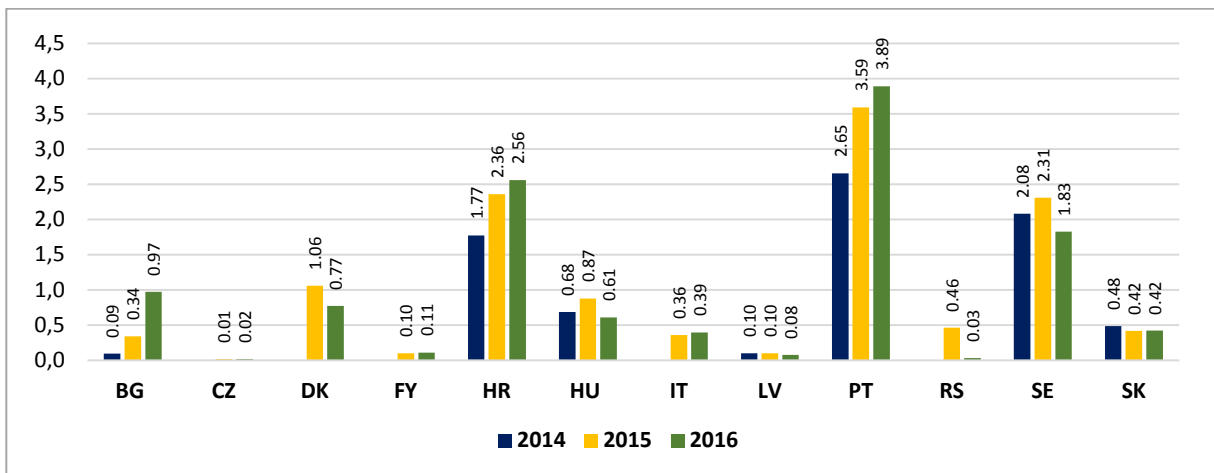
Figure below shows complaints received by NRAs about postal services per country per 10,000 inhabitants. In 2016, the complaints rate ranged from 2.59 (Sweden) to 0.01 (France). The overall complaints rate has increased (0.16 complaints per 10,000 inhabitants in 2015 and 0.23 in 2016).

Figure 11 – Complaints received by NRAs about postal services per country per 10,000 inhabitants, 2014-2016



In turn, the figure below shows complaints received by USPs about cross-border services per country per 1,000 inhabitants. The complaints ranged in 2016 from 3.89 (Portugal) to 0.02 (the Czech Republic). There is a split even between countries that show an increase in the number of complaints about cross-border services and countries that show a decrease in what regards the 2015-2016 period. The overall complaints rate, considering the data available, has remained almost the same, with a slight decrease from 2015 (0.85) to 2016 (0.84).

Figure 12 – Complaints received by USPs about cross-border services per country per 1,000 inhabitants, 2014-2016



Most NRAs mentioned items lost, damaged or substantially delayed as the main reasons for complaints in 2016.