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User Needs in the Postal Sector

Interim findings

A study for DG GROW

Public Stakeholder Workshop

Brussels, 4 June 2019

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Agenda

09:00-09:30	Coffee and registration
09:30-10:00	Welcome and introduction (European Commission)
10:00-11:15	Interim findings from study on Postal user Needs/Evaluation of the Postal Services Directive (WIK-Consult), presentation and Q&A
11:15-12:45	Panel discussion: “Which postal services do tomorrow’s users need?” (moderated by Sonja Thiele, WIK-Consult)
12:45-13:45	Lunch break
13:45-15:20	Panel discussion “Assessment of the Postal Services Directive” (moderated by Alex Dieke, WIK-Consult)
15.20-15:30	Concluding remarks (European Commission)

Content

- Purpose and scope
- Methodology
- Trends in the EU postal markets
- Tomorrow’s user needs
- Next steps

Purpose

The aims of this study are

- to present changing user needs in the postal sector, and possible adaptations, including on the sustainability of the universal service obligation; and
- to analyse and evaluate the adequacy of the EU postal regulatory framework

Today, our objectives are

- to obtain input from stakeholders on future user needs; and
- to obtain input from stakeholders for the assessment of the Postal Services Directive, or selected elements of the Directive

Scope of the study

- Identify present and future user needs
- Evaluate Postal Services Directive (PSD)
- Recommendations regarding PSD

Geographical scope

EU-28/EEA and Switzerland

Content

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Methodology

Data collection	Stakeholder interaction	Evaluation tool
Desk research ➢ User surveys ➢ Market reports ➢ Legislation ➢ Statistics ➢ Studies ➢ Surveys ➢ Press	Targeted consultation: Online survey (~400 postal stakeholders) 120 In-depth interviews 3 public stakeholder workshops	Evaluation based on Better Regulation Guidelines of the European Commission

- Literature review including
  - MS postal user needs surveys
  - ERGP (2016), Report on Universal Services in light of changing postal end users´ needs
  - Main Developments 2013-2016
  - Cross-border parcels study (WIK-Consult)
  - 2015 Application Report COM(2015) 568

Stakeholder Online Survey

Method	Scope	Contents
▪ Online survey ▪ Questionnaire language: English ▪ Programming and hosting by specialised IT supplier	▪ Target: 400 responses ▪ Postal stakeholders in EU-28 and EEA: ➢ Regulators ➢ Postal operators ➢ Postal users: Associations and business senders	▪ Expectations on future, e.g. ➢ Postal market developments ➢ Substitution and digitisation ➢ Impact of e-commerce ➢ User needs ➢ Vulnerable postal users ➢ Provision of (universal) postal services ▪ Stakeholder views on PSD (regulators, operators)

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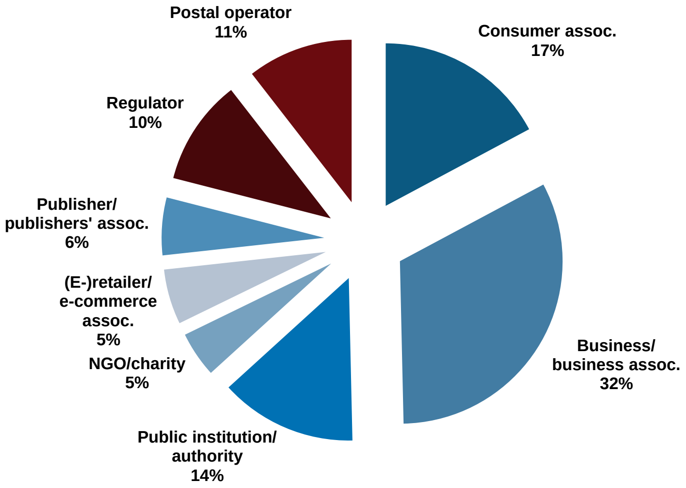
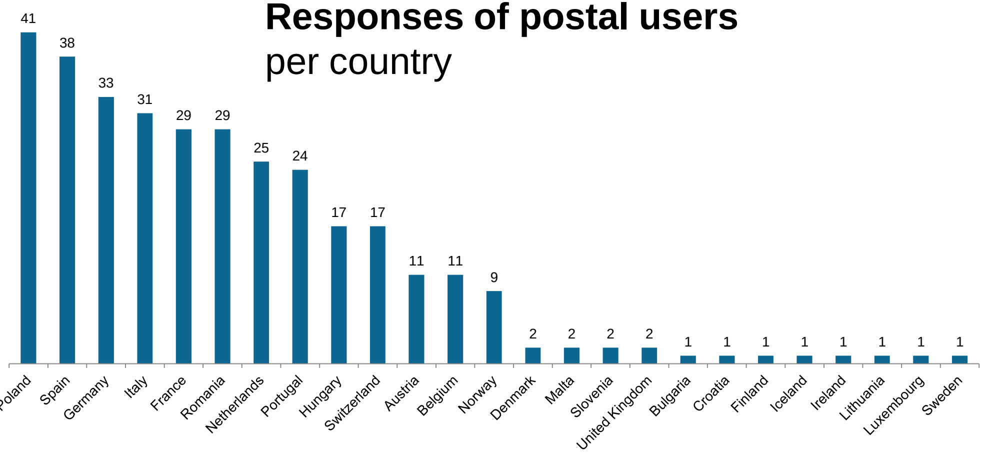
WIK Stakeholder online survey results

- Survey from 22 March – 17 May 2019
- 418 responses: 44 regulators (almost all NRAs, ministries), 44 operators (28 USPs), 331 postal users

Responses all stakeholder groups



Responses of postal users per country



Source: WIK-Consult Stakeholder online survey 2019

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In-depth interviews

- Collection of further evidence
  - Case studies
  - Market developments
  - Areas for action

Number of interviews per stakeholder group

Regulatory authorities	Delivery companies	Intermediaries	Postal users & their associations
• Sector regulators • National competition authorities • Ministries responsible for postal policy	• National postal operators (universal service providers) • Parcel & express carriers • Postal competitors	• Letter shops • Consolidators • Hybrid mail suppliers	• Public authorities • Large business mailers • Publishers • E-retailers • Courts
30-40 interviews	30-40 interviews	20-30 interviews	40-50 interviews

If you would like to participate in the in-depth interviews, please contact us at userneeds@wik-consult.com

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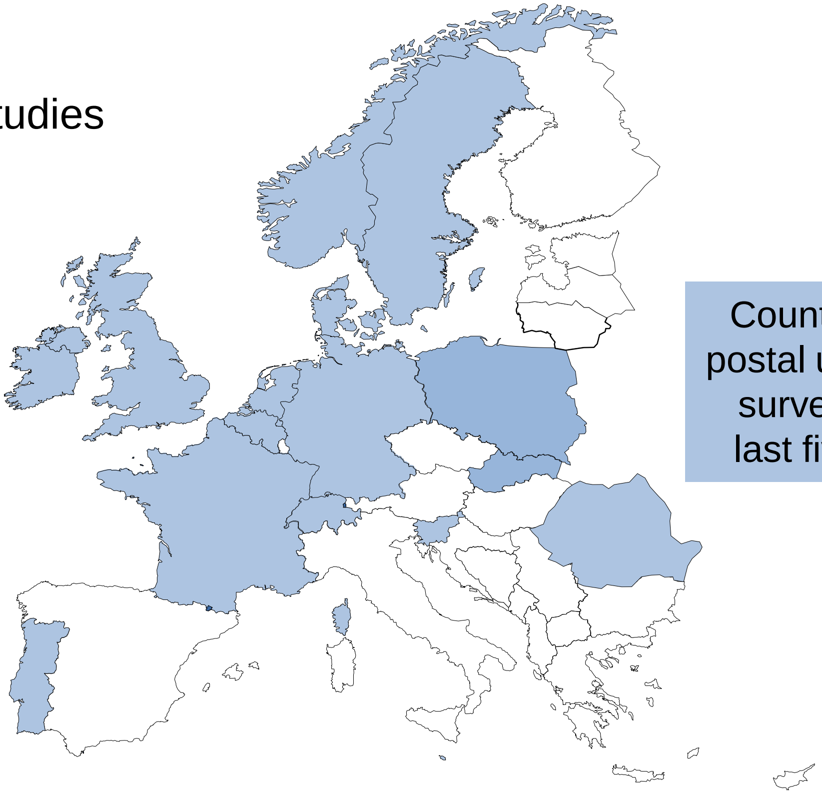
Literature review

- Systematic review of 64 recent studies from 16 countries within EU-28/EEA+CH
- Focus on private and business user needs
- Main topics
    - ➢Usage of postal services
    - ➢Delivery frequency
    - ➢Mode and time of delivery
    - ➢Postal outlets



Countries with postal user needs surveys in the last five years

Next steps: Evaluation of the PSD

Evaluation:
Evidence-based analysis of the PSD

Collect evidence from desk research, targeted consultation, and interviews

Evaluation of PSD according to Better Regulation Guidelines

Leading question

In light of future user needs, is the PSD still appropriate?

Approach for PSD evaluation

Evaluation of PSD according to Better Regulation Guidelines

Criterion	Our understanding	Assessment
How **effective** has the PSD been?	Enables effective regulatory practice? Contributes to achieving goals of Directive? Practical problems?	
How **efficient** has the PSD been?	Costs proportionate to benefits? Impact on USPs resource allocation, funding of net costs in future etc.	Identify advantages and disadvantages
How **relevant** is the PSD?	How well are current and future user needs reflected in the PSD? To what extent are the objectives of the PSD relevant to future users?	
How **coherent** is the PSD internally and with other (EU) actions?	Coherent with other legislation? e.g. Cross-border parcel regulation, Consumer Rights Directive Contradictions of objectives? Objectives coherent with PSD articles? etc.	
What is the **EU added value** of the PSD?	Added value compared to national postal legislation, consequences of withdrawing PSD etc.	

Topics to be evaluated

- Topics to be evaluated
  - Universal service
    - Scope and definitions
    - Frequency and quality of service
    - Designation & financing
    - Pricing & accounting separation
  - Market access and access to infrastructure (competition issues)
  - User protection
  - Institutional issues incl. NRAs
- WIK will evaluate specific elements of the regulatory framework / articles of PSD
- Recommendations to suggest potential improvements of regulatory measures (but not propose text)

Content

Volume trends: Great diversity among MS

Letters

- Overall in EU-28/EEA+CH: -4.2 %
- Declining letter volume varies strongly among Member States: -15 % DK / 0 % DE
- Letter mail items per capita vary largely from 425 (CH) to 3 (BG)
- B2C still most important volume share, followed by B2B, C2X, Gov2X

Parcels

- Parcel and express volume increased by 9 % (2015-2016; EU-28/EEA+CH)
- In 2017, about 60 % of all individuals in Europe shopped online
- Letter products (incl. small packets below 2 kg) account for 80 % to 85 % of total B2C e-commerce deliveries (WIK estimate for 2016)
- One third of last cross-border purchases from China (WIK consumer survey 2018)

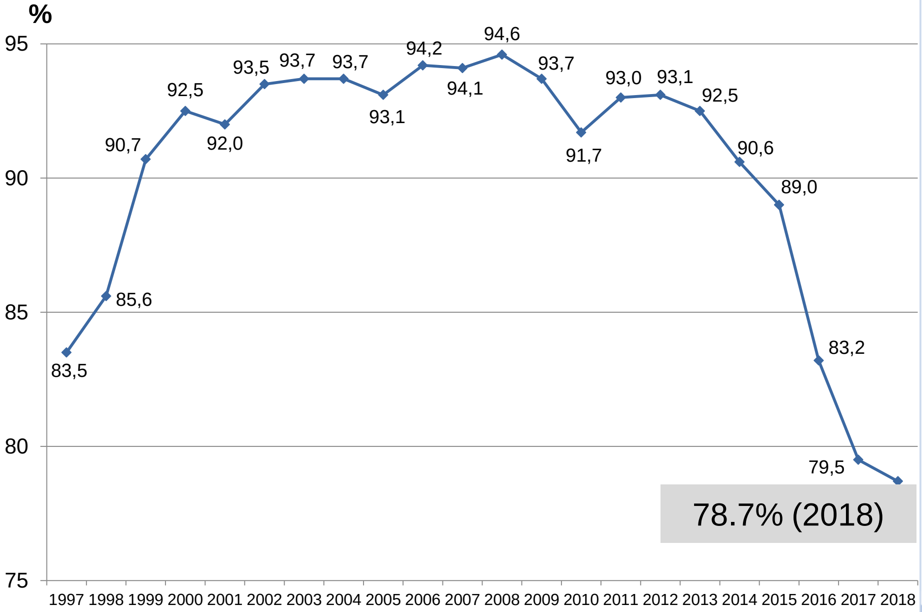
Source: Main Developments 2013-2016; WIK-Consult Cross-border E-commerce 2019; UPU (2016), Research on Postal Markets

Pressure to save costs and increase prices: Quality of service down for letters

- Price for 20g single piece letters increased +27% on average (2013-2016)
- Bulk mail prices increased less (20g bulk mail letter +10% on average)
- Significant increases in e.g. Italy (+300%) and Denmark (+138%) for 20g single piece priority domestic letter
- Share of domestic on-time deliveries has declined in 2013-2016
- Controlled decline in international letter performance since 2013

J+3 performance development 1997-2018

IPC UNEX CEN module 2018 results

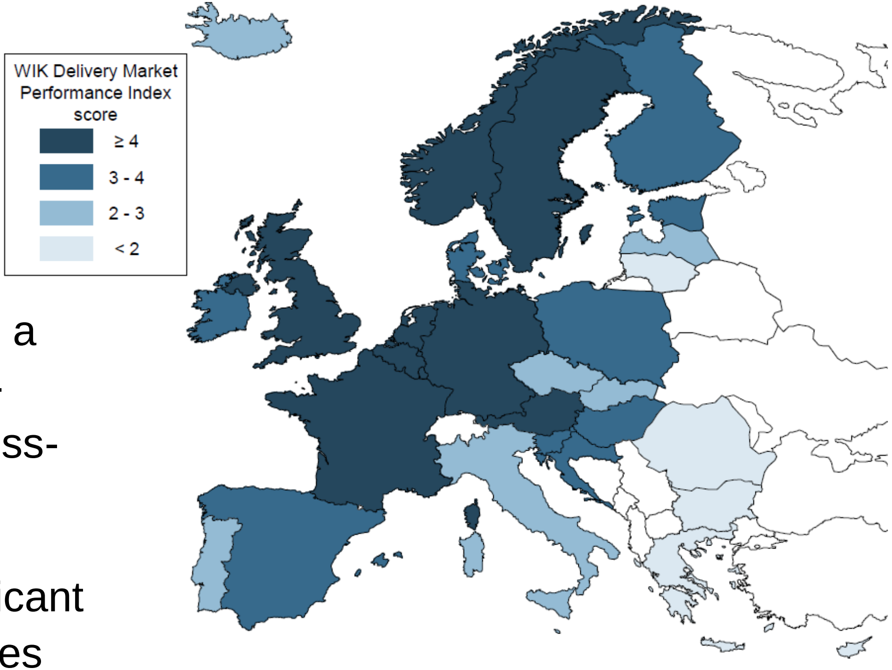


Source: WIK-Consult based on Main Developments 2013-2016; IPC, UNIEX CEN module 2018 results

Parcels: Increasing competition & innovative delivery solutions

- More choice and better quality for domestic and international parcel delivery services in most countries
- B2C e-commerce and competition have created incentives for USPs to improve and innovate
- Track & trace becomes more and more a standard feature: in 19 countries in EU-28/EEA included in domestic and in cross-border universal service parcels
- Even SME e-retailers are offered significant rebates compared to publicly listed prices

WIK Delivery Performance Index



Source: WIK-Consult Cross-border E-commerce 2019

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Tomorrow's user needs: what the users say today

- Who will the users be?
  - Different user groups, e.g. consumers as senders, consumers as receivers, small businesses, public authorities, utilities etc.
- For which purposes?
  - Different purposes: e.g. interacting with businesses, manage customer relationship, social interaction etc.
- Which services will be needed?
  - Different types of mail, e.g. correspondence, letters containing goods, transaction mail, social mail, advertising etc.

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... and what they might really do in future

- Who will the users of letter mail be?
  - Communication strategies of senders?
  - Preferences of most receivers?
  - Vulnerable users?
- For which purposes will they send letters?
  - Basic social needs do not change: communicate, do transactions, advertise, etc.
  - What will influence users' decisions to choose communication tools to fulfil their needs?
- Which services will the users prefer?
  - Which features of services, e.g. real-time, seamless digital processes, reliability?
  - Which are the unique features of letters?

Basic user needs and digital alternative to letters

Communication
- Social media
- E-mails
- Phone calls and messaging

Transactions
- Electronic mailboxes
- Mobile applications („Fintechs“)
- Secure electronic IDs (eIDAS)

Advertising
- Omnipresent marketing
- Online advertising (and sharing)
- Real-time monitoring & optimisation

Information
- Search engines
- Social media
- Freemium online media

What‘s left for the mailbag?

E-substitution is continuing – but how quickly is it embraced?

Potential accelerators	Factors slowing down
• **Innovations** in e-government, e-commerce, social media, online magazines and newspapers, online advertising • **Cost saving** of senders • New, **easy-to-use devices** at lower prices • **Generation change** • **Prices and competition** in the letter and parcel market • **Quality of serv**ice of letter mail: availability, reliability, speed of delivery • **Image**: „The future is digital“	• Senders' **budget** for digitisation too small • **Responsiveness** of clients and business partners too low • No full substitution for validation and verification (**juridical or technical problems**) • Digitisation of **governments** delayed • Slower **roll-out of broadband** in rural and remote areas • Overall **economic development** influences recipients and senders

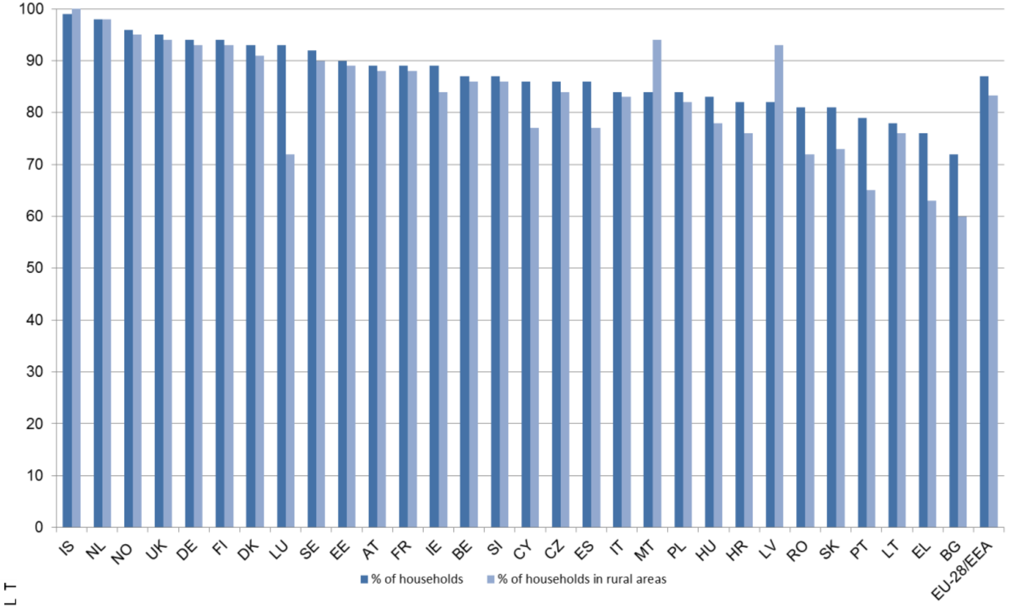
Drivers of tomorrow’s user behaviour

Product	USO*	Main postal user groups	Drivers for change
Single piece letters	All	Private consumers/citizens	Convenience, media literacy, habits, e-government
Registered/ Insured	All	Government authorities, business consumers	Legal requirements (e.g. validation and verification)
Bulk mail	Many	Business consumers (e.g. insurances, utilities, financing)	Responsiveness, budget for digitisation, re-structuring strategies
Direct mail	None	Business consumers (e.g. (local) SMEs)	Online advertisement response rates, habits (~25 yrs. „digital natives“)
Publications	Few	Publishers (e.g. TV guides, company magazines)	Freemium business models, price of devices (tablets)

“ porduct part of universal service obligation in EU-28/EEA+CH

E-substitution: Internet access cannot be taken for granted everywhere

Households with Internet access 2018



- On average, 87 % of households with internet access (82 % rural areas, 90 % urban areas)
- “Digital divide” not in all countries (even reverse picture in MT, LV)

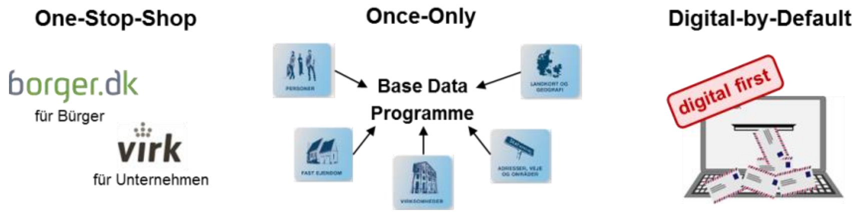
Non-onliners

- In households without internet access the internet is mostly considered “not useful” (46 %) or people lack media literacy skills (43 %)
- Only 3 % of businesses without internet connection (2017)

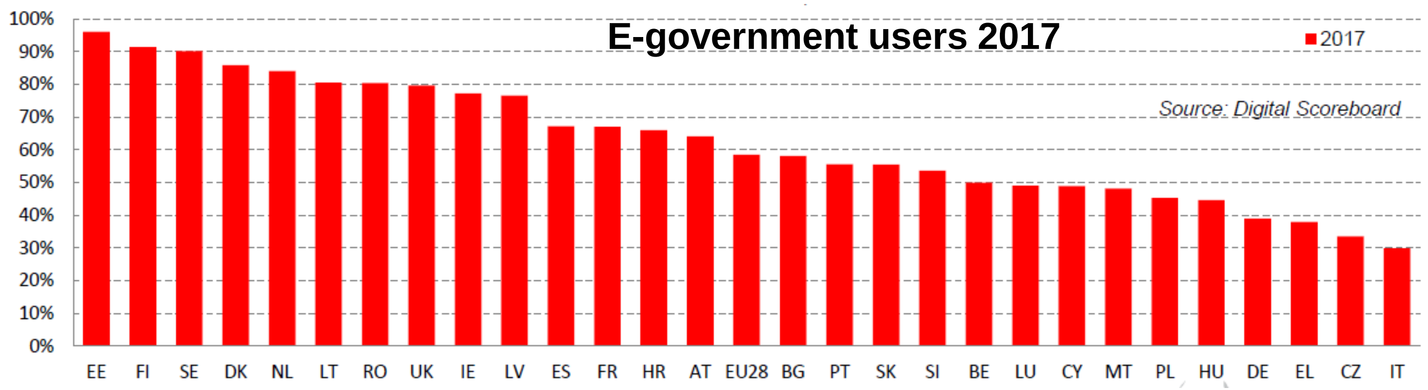
Source: WIK-Consult based on Eurostat (CH, LI no data)

E-substitution: steady progress of e-government

- Principles of the EU eGovernment Action Plan 2016-2020:
  One-Stop-Shop
  Once-Only
  Digital-by-Default



- Growing use of e-government solutions by citizens and businesses: 58% of EU citizens choose electronic public services (“saves time”)



Source: European Commission DESI Report 2018 – Digital Public Services, WIK Diskussionsbeitrag 436, 2018

Tomorrow's user needs: what the users say today
WIK Stakeholder online survey

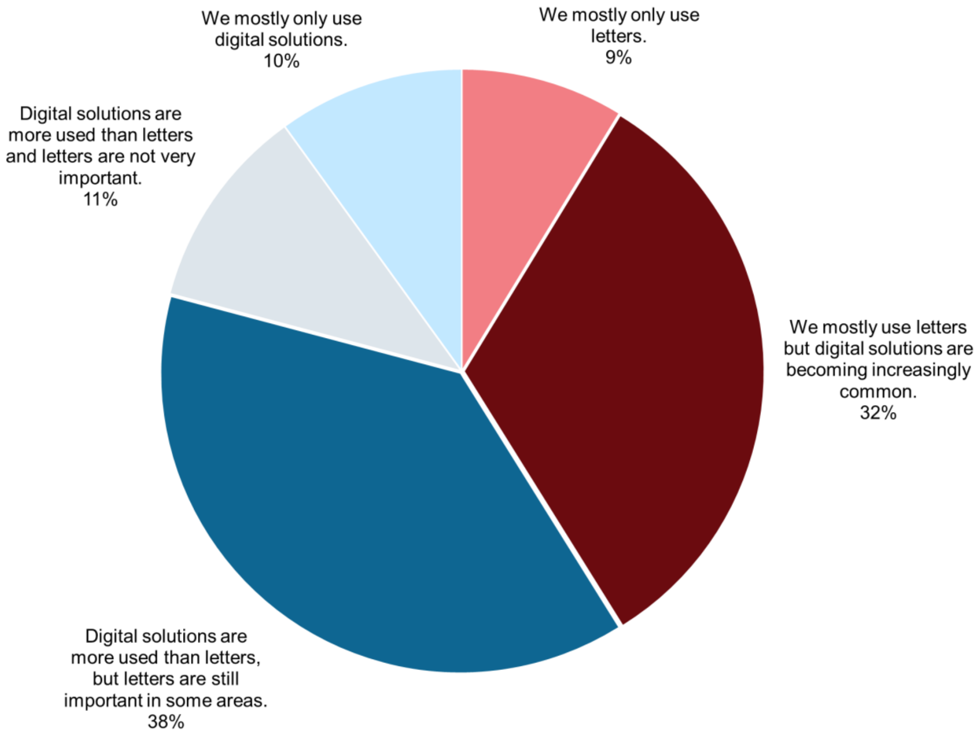
- 331 respondents from 25 countries (only users)
  - Consumer associations
  - Business or business association
  - Public institution or public authority
  - NGO/charity
  - (Online) retailer or e-commerce assoc.
  - Publisher or publishers' association

- Survey from 22 March – 17 May 2019

- Standardised questionnaire in English

79% of respondents still use mainly/mostly letters, or at least for specific purposes

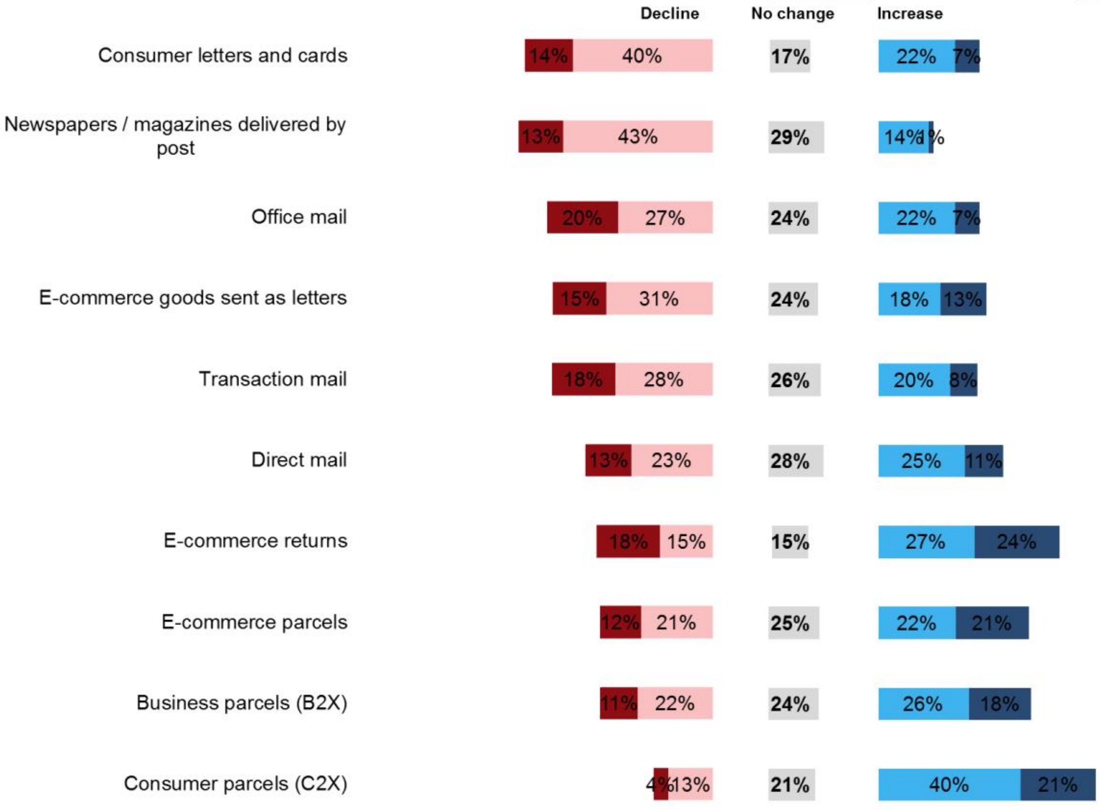
- Only 9% of respondents rely on letters only
- 32% use mostly letters but will probably become more digital in future
- 38% depend on digital solutions but rely on letters for some purposes
- More than 20% either use more digital solutions than letters or almost only digital solutions



Source: WIK Stakeholder online survey 2019/postal user

"Compared to digital solutions, how important are letters to you (or the user group you are representing)?" N=331

Respondents expect decline for correspondence and newspapers

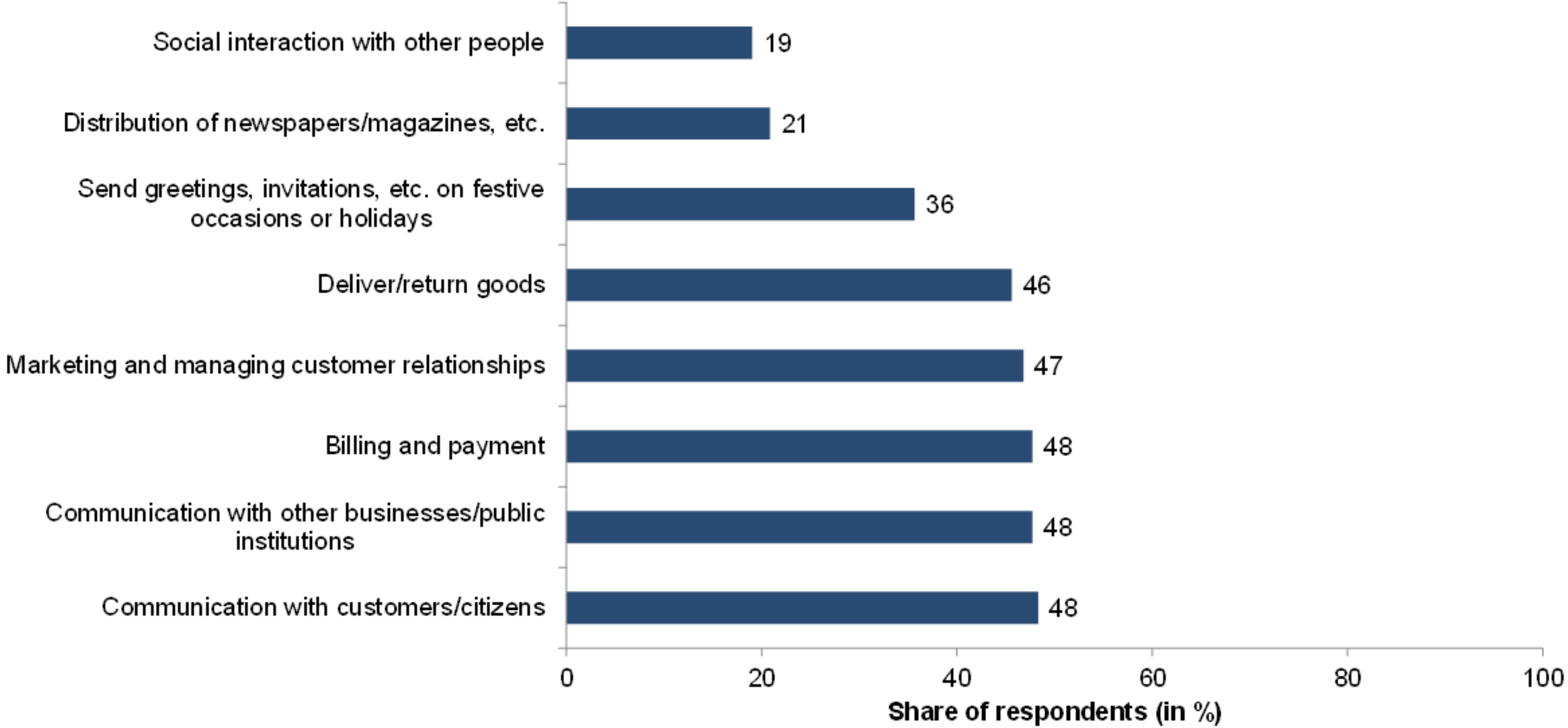


"In your opinion, how will postal volumes develop during the next 5-10 years for the following mail categories?" N=331

Scale
strong increase (>20% in 10 years)
slight increase (<20%)
no change
slight decline (<20%)
strong decline (>20%)

Source: WIK Stakeholder online survey 2019/postal user

Purposes for sending mail in 5-10 years: Letters remain important for businesses



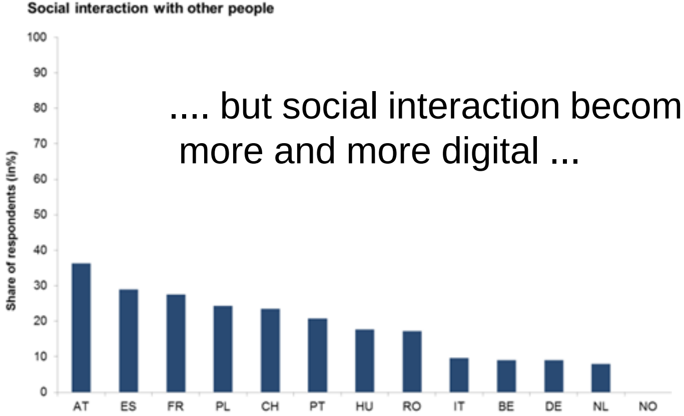
"For which purposes do you expect you / your members will be sending or receiving mail in 5-10 years? Please select up to 5 purposes." N=331

Source: WIK Stakeholder online survey 2019/postal user

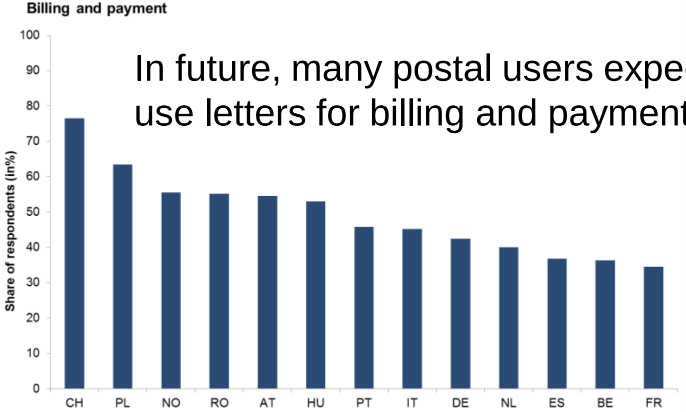
Social interaction and private communication will be more digital than business communication

Marketing might still be more letter-based due responsiveness ....

.... but social interaction becomes more and more digital ...



In future, many postal users expect to use letters for billing and payment

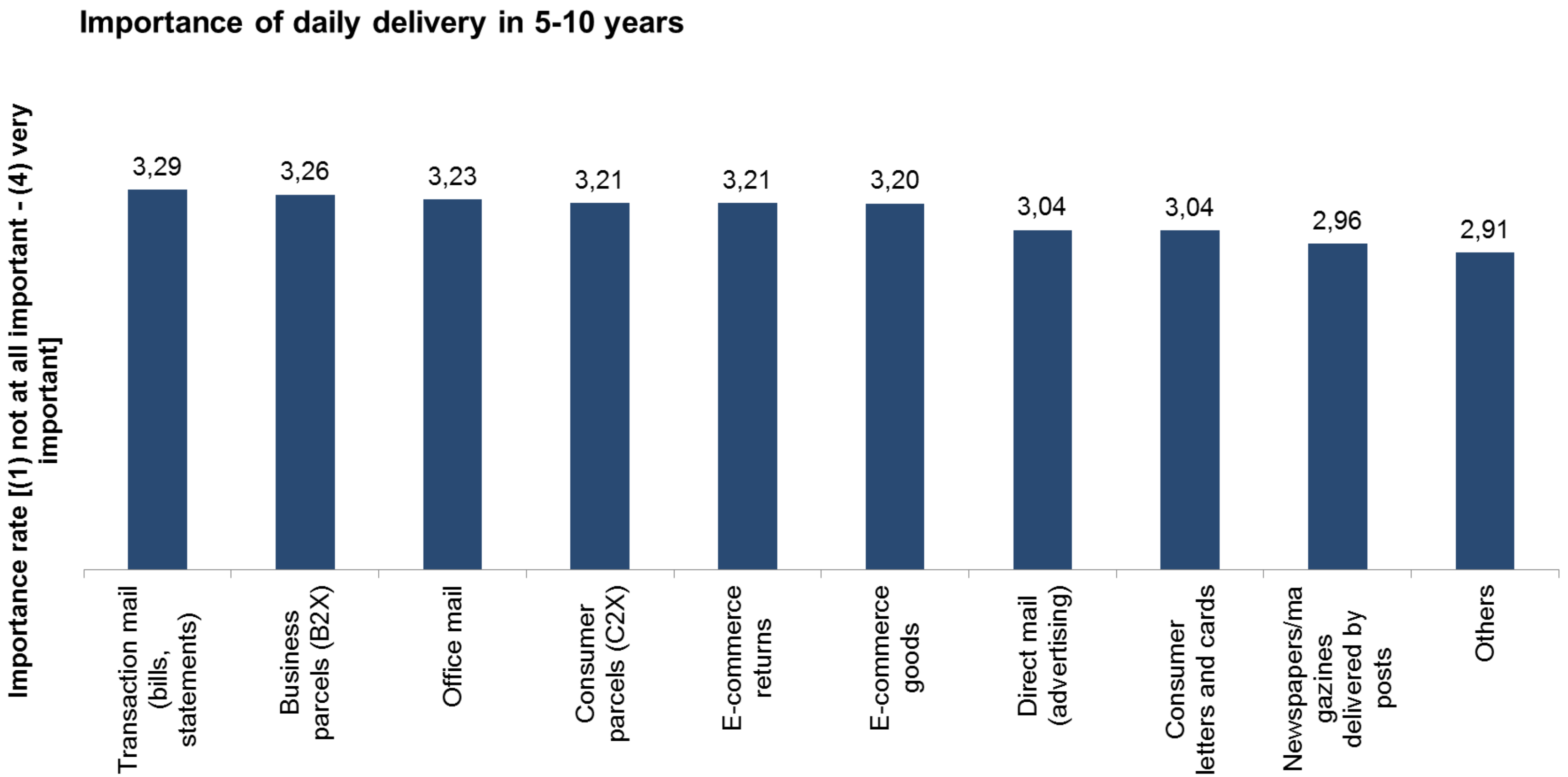


... unless its a special occasion

"For which purposes do you expect you / your members will be sending or receiving mail in 5-10 years? Please select up to 5 purposes, N=331

Source: WIK Stakeholder online survey 2019/postal user

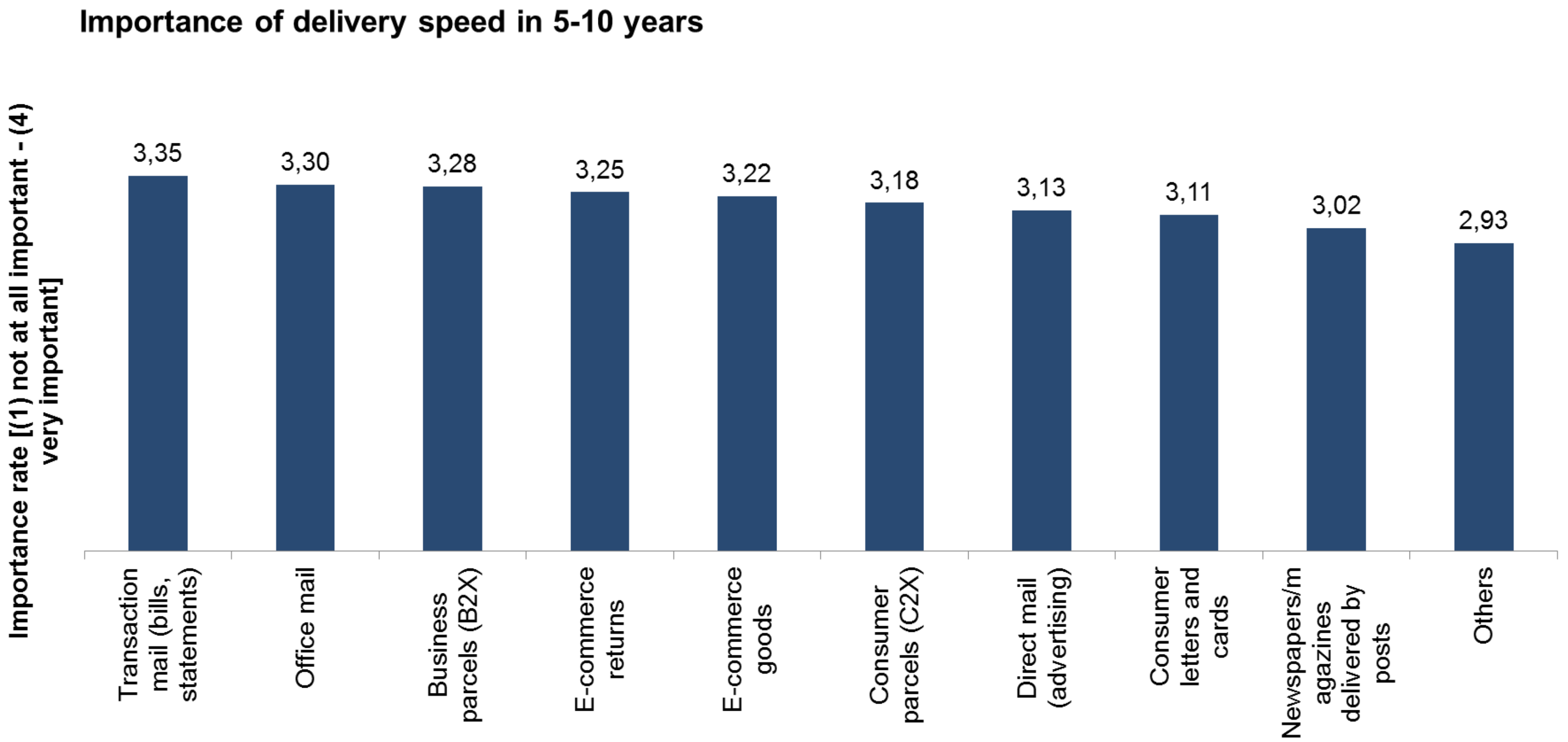
Postal users rate daily delivery more important in transaction mail (and parcels)



Source: WIK Stakeholder online survey 2019/postal user

"In 5-10 years, how would you rate the importance regarding the daily delivery of the following postal items?" N=331

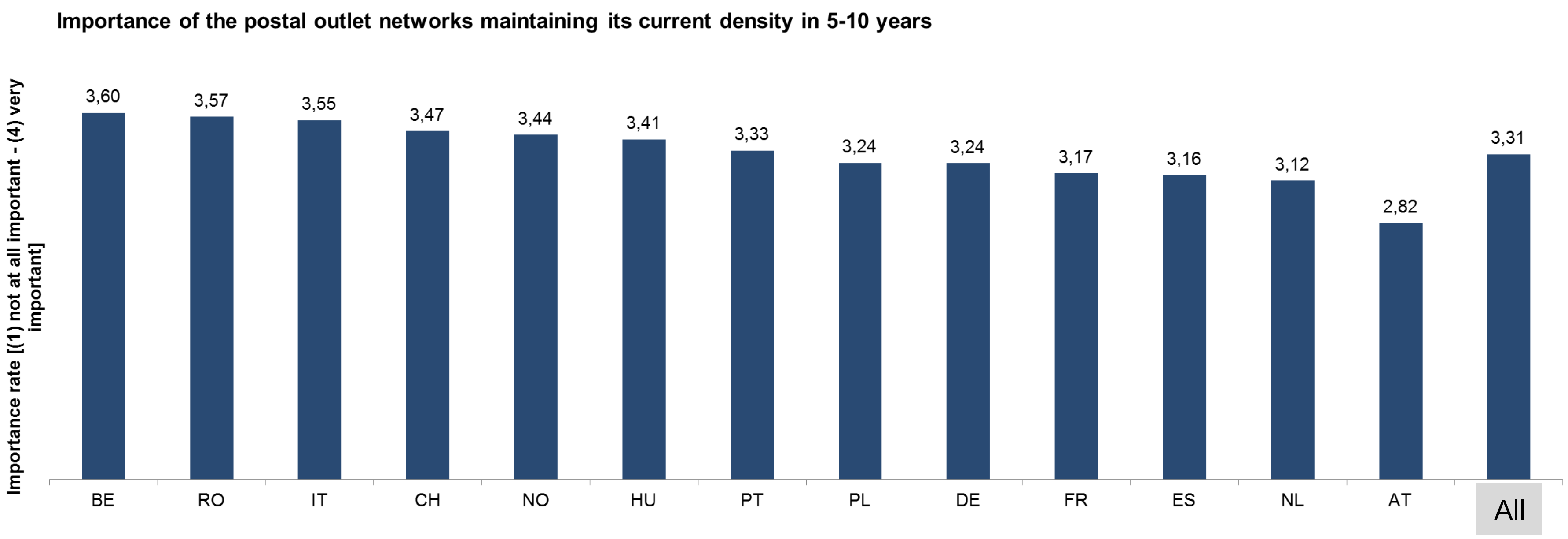
Postal users rate importance of delivery speed of direct mail, consumer letters, and newspapers lower



"In 5-10 years, how would you rate the importance regarding the speed of delivery of the following postal, e.g. one or two days after posting?" N=331

Source: WIK Stakeholder online survey 2019/postal user

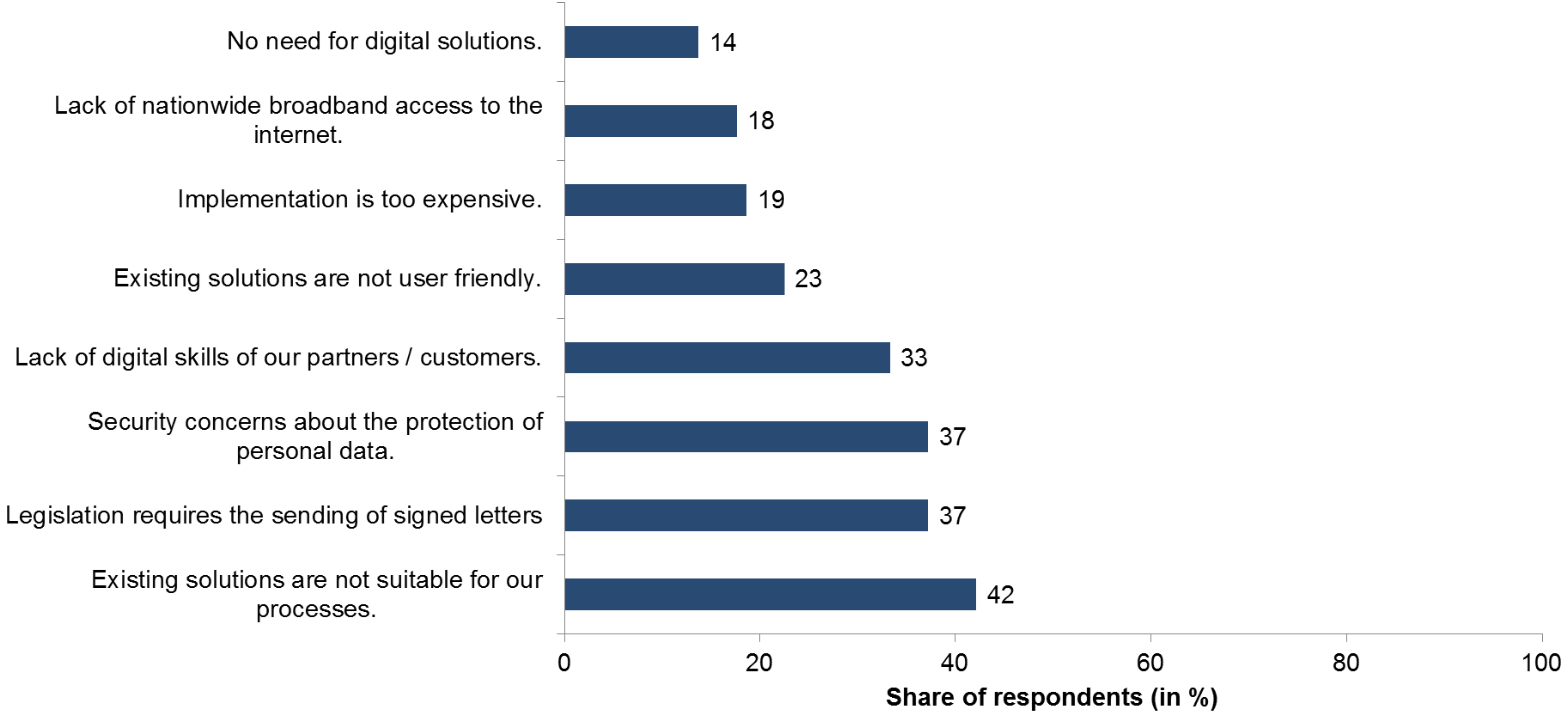
Postal users rate postal outlets networks maintaining its current density as „important“



Source: WIK Stakeholder online survey 2019/postal user

“In 5-10 years, how important will it be, in your opinion, that postal outlet networks in your country at least maintain their current density?” N=331

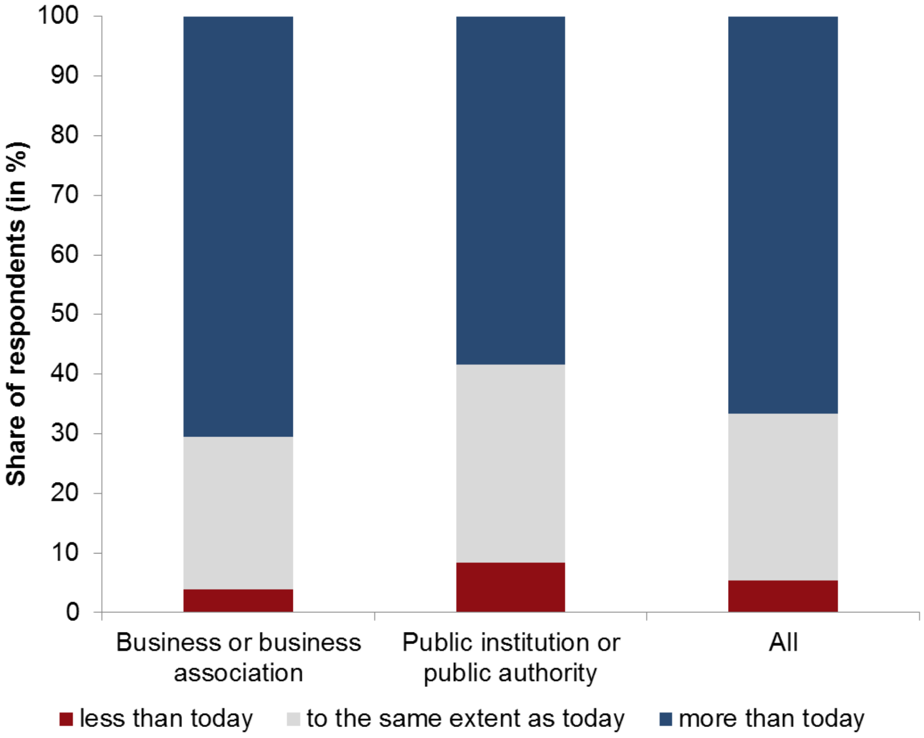
Respondents criticise lack of suitable, convenient, and secure digital solutions



“Please select 3 reasons why you do not use communication portals.” N=102

Source: WIK Stakeholder online survey 2019/postal user

Hybrid mail solutions known to 39% of respondents. Two thirds plan to use them more

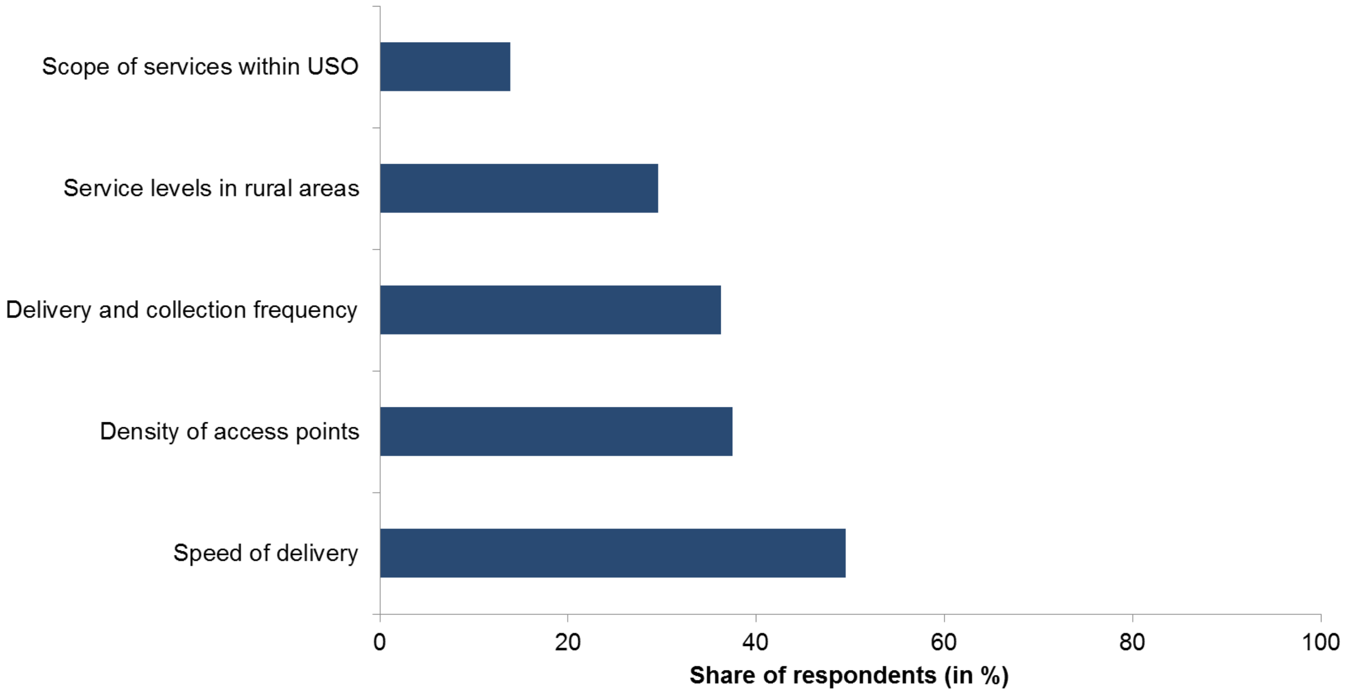


- Hybrid mail will remain a suitable solution for senders with „digital native“ and „traditional“ recipients (e.g. public authorities, insurances)

"In your opinion, how will you / businesses in your sector use hybrid mail solutions in the future: In the next 5-10 years, we / businesses in our sector will use hybrid mail solutions…", N=75

Source: WIK Stakeholder online survey 2019/postal user

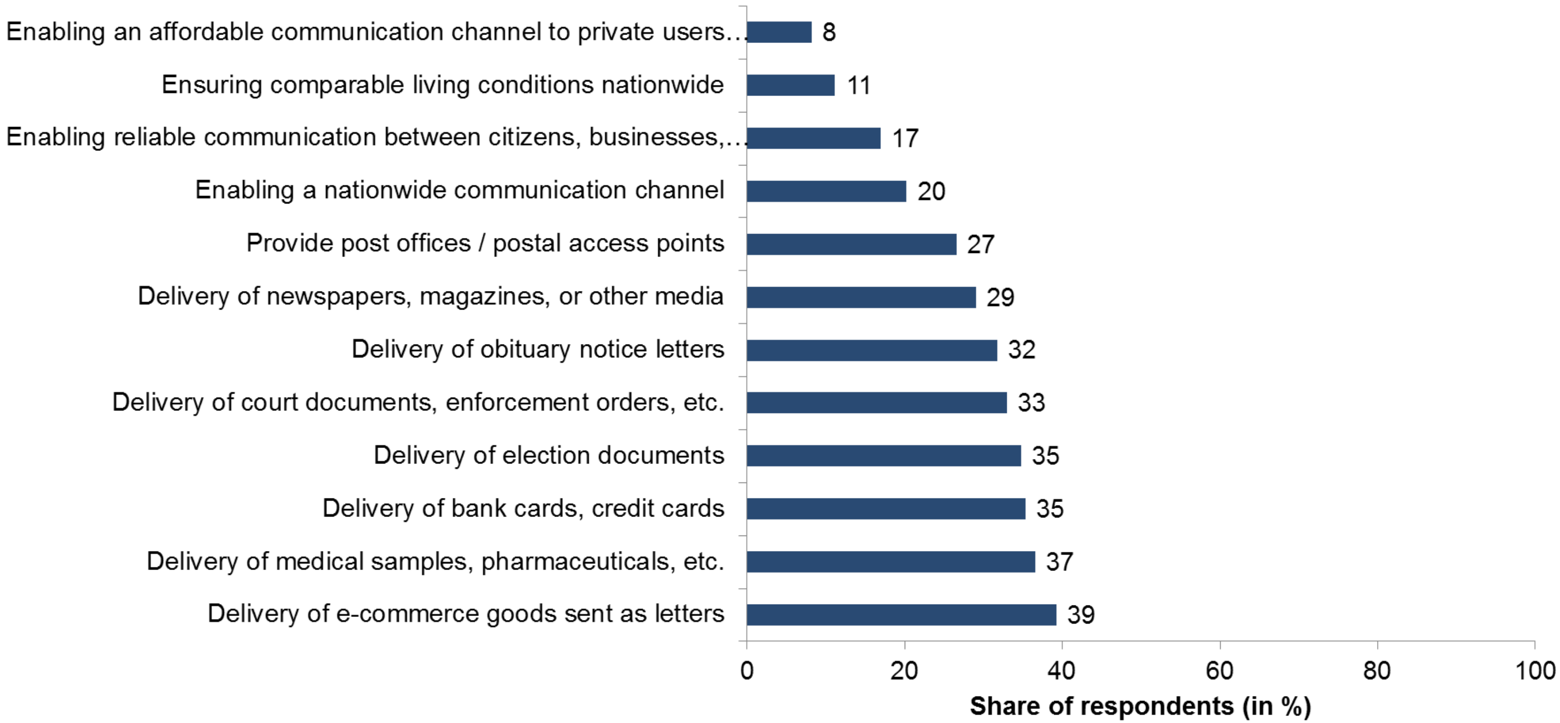
Respondents would rather reduce speed of delivery than scope of USO



“From your perspective, if the use of letters becomes less frequent in the future (5-10 years) what universal service features could be reduced? Please state the areas for which you would accept changes to universal services. (Select all that apply)
N=331

Source: WIK Stakeholder online survey 2019/postal user

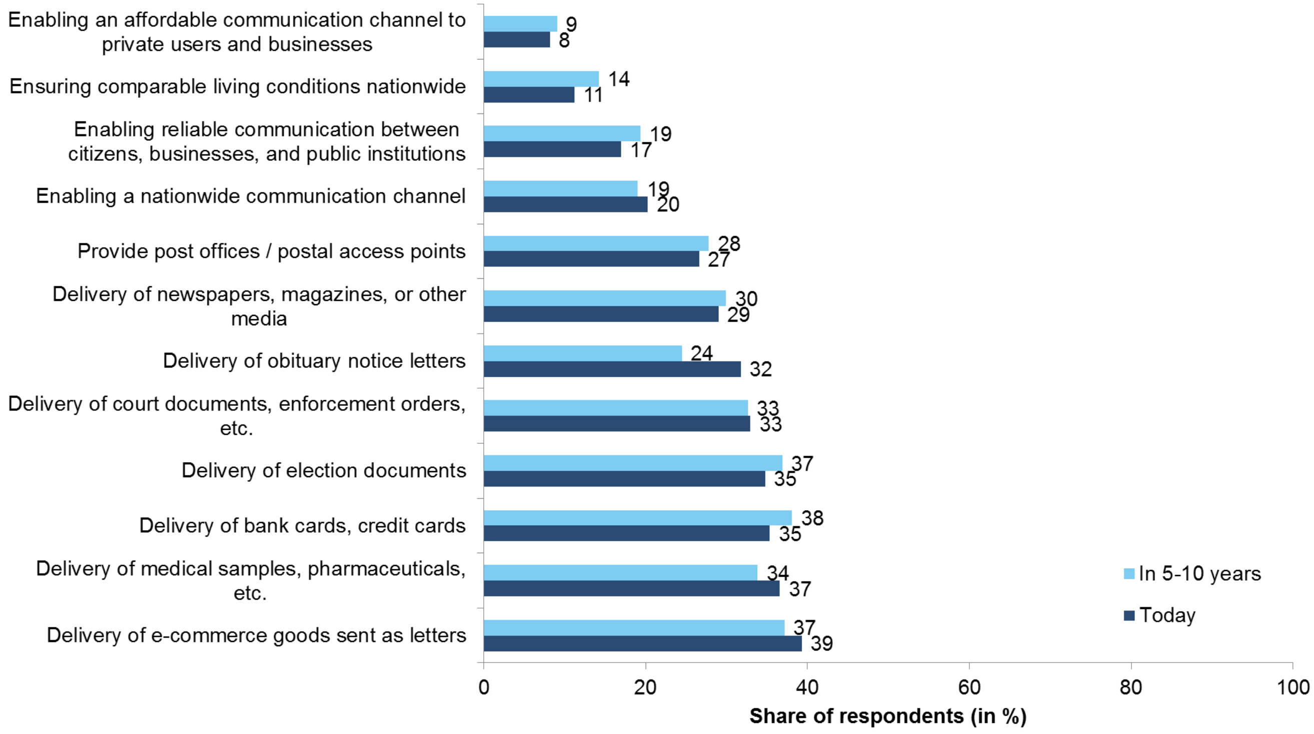
E-commerce seen as a „societal need“



“Please state the societal needs in your country to which the USO for postal services currently corresponds to (or should correspond). Please select up to 5 needs” N=331

Source: WIK Stakeholder online survey 2019/postal user

Expectations about future needs are hardly different from views about present needs



Source: WIK Stakeholder online survey 2019/postal user

"Please state the societal needs in your country to which the USO for postal services currently corresponds to (or should correspond) ....should correspond in 5-10 years. Please select up to 5 needs" N=331

Define and determine groups of vulnerable users

General definition:

“A consumer, who, as a result of socio-demographic characteristics, behavioural characteristics, personal situation, or market environment:

- Is at higher risk of experiencing negative outcomes in the market;
- Has limited ability to maximise their well-being;
- Has difficulty in obtaining or assimilating information;
- Is less able to buy, choose or access suitable products; or
- Is more susceptible to certain marketing services.”

- Potential dimensions of vulnerability as regards users of postal services
  - living in remote and rural areas
  - low income
  - lack digital skills
  - reduced mobility
- Not a static condition. Vulnerability depends on expected market outcome
- Some trends of digitisation also compensate vulnerabilities
- In the study, we will determine group of potentially vulnerable users

Source: Consumer vulnerability across key markets in the European Union 2016, p. 20; Directive 2005/29/EC

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WIK literature review of recent studies on users

- Regulators or ministries of more than half of the Member States have commissioned surveys
  - Representative consumer and business surveys
  - Business surveys usually target SMEs
  - Some surveys apply methods for measuring the Willingness-to-Pay in order to reveal actual preferences
  - Some surveys consider needs of different groups in the population (e.g. by age, region, physical disability) that may deviate from the national average
  - Not strictly comparable due to different methodologies and survey techniques, but provide indications on users‘ attitudes with regard to postal services
- Topics of the surveys
  - Use of postal services (sending and receiving postal items) and user satisfaction
  - User preferences or needs on postal outlets, delivery location, delivery frequency, speed and time of delivery

Surveys confirm the trend of declining demand for letter services

BE (2017)

- Mainly administrative / transactional function for consumers and freelancers
- Vulnerable postal users depend more on postal services (particuarly older citizens)

DK (2015)

- Citizens mainly send greeting cards and invitations by post
- Use of digital alternatives vary with age: older citizens prefer e-mail while young people use social media

RO (2015)

- More frequent use of postal services in urban than in rural areas
- Less choice in rural areas (citizens have to rely more on universal postal services by Romania Post)

- General volume trends confirmed (less letters, more parcels) but variation among countries
- Citizens receive more letters and parcels than they send
- Letter services: Younger people send and receive less letters than older citizens
- Purposes vary among countries
  - Majority use post for personal communication (greeting cards etc.)
  - Still needed for administrative / transactional purposes in most countries
  - Registered letters needed for administrative / transactional purposes in some countries

SMEs still rely on postal services

BE (2017)

- Letter post still important for businesses for SMEs/large mailers
  - need for registered letters
  - for advertising purposes

DK (2015)

- Businesses increasingly use letter products to send merchandise
- Declining use of letter services for transactional / business purposes

NL (2016)

- Less use of letter services by SMEs for transactional purposes
- SMEs increasingly consider letter services as time-consuming and cumbersome

- Generally declining use of letter services by SMEs but at different paces
- Still important for SMEs in many countries more for transactional / administrative than for advertising purposes
  - Registered letters play an important role in in some countries (e.g. BE, IT, PL, PT)
- Changing attitude to letter services in highly digitized countries (e.g. DK and NL)
  - Letter services considered as time-consuming and burdensome

Home delivery is the mostly preferred delivery option

NL (2016)

- Letter services: Consumers do not accept community letter boxes

PT (2017)

- Almost all consumers would prefer to receive letters and parcels at home
- Letter services: Consumers would not accept community letter boxes

SI (2018)

- Consumers are willing to pay higher postal tariffs to ensure home delivery

- Home delivery has different meanings
  - Doorstep delivery of parcels and registered items with personal handover
  - Letter box delivery of letters (location of the letter box matters)
- Home delivery is the most preferred mode
  - No acceptance for centrally located “community letter boxes” in highly digitized countries like NL or low volume countries like PT
  - Lower level of acceptance for alternative delivery locations for parcels by older people

Mixed results for the frequency of delivery

DK (2015)

- Consumers and micro businesses would accept a delivery frequency of less than four days per week
- Large businesses claim to need five delivery days

NL (2016)

- Three quarter of individuals and businesses would accept a delivery at least 4 days per week.
- A quarter found it unacceptable to further reduce delivery frequency

SE (2019)

- Reduction of the delivery frequency would be preferred to an increasing the distance to the privat letter box

- Consumers:
  - Appear open for a reduction to four-day delivery per week in many countries (e.g. in DE, IE, NL, PL, PT, SE)
- Business users:
  - More reluctant to accept reductions in delivery frequency for letters (e.g. in BE and NL)
  - Need choice (priority, non-priority services) depending on purpose and urgency
  - Parcels should be collected and delivered on five days per week (e.g. DK)

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Slower delivery standard appears acceptable but next-day delivery still needed as option

BE (2017)

- Choice between D+1 and D+2 useful
- Business users require D+1 delivery of parcels (same: DK)

DE (2018)

- No WTP for 5 or 6 day delivery per week
- But high WTP for D+1 or D+2 delivery (instead of D+3)

FR (2017)

- Useful to have a choice between priority and economy letter (lettre verte)

- Non-priority letter services (D+2 or D+3) acceptable for consumers if cheaper than next-day delivery in some countries, e.g. in BE, IE
- Reliability more important than next-day delivery (day/time-certain delivery) e.g. in NL
- Users prefer to have the choice between D+1 and slower delivery options, e.g. in BE, FR, NL and RO
- In some countries there is still a preference for next-day delivery (e.g. DE, MT and SI)

Postal outlets are essential for postal users

DE (2018)

- Consumers: Mainly used for sending letters / parcels or picking up parcels
- SMEs rely on postal outlets for sending and collecting postal items

PT (2017)

- Mainly used for collecting and sending registered letters / parcels
- Important for some citizens (older people, people living in rural areas) for daily life (social role)

SE (2018)

- Mainly used for collecting parcels and small packages that do not fit in the letterbox and to send parcels

- Mainly used for accessing postal services and much less for financial or other services
  - Collection of registered letters and parcels (often due to failed home delivery)
  - Buying stamps, sending registered letters and parcels (e-commerce returns)
- Important for SMEs to send/collect postal items
- In some countries postal outlets fulfil a societal function
  - They are important for the citizens' daily life particularly in rural areas
  - Offer governmental / administrative services (e.g. in FR, PT, UK)

More flexible and longer opening hours requested by postal users

PL (2017)

- High density of postal outlets appreciated by postal users
- It improves competitiveness of the USP Poczta Polska

PT (2017)

- Preference for easily accessible locations and convenient opening hours (particularly of the urban population)

RO (2015)

- Longer opening hours and more working days (Sat/Sun)
- Not acceptable to travel to the neighbour city to the next post office

- Usually high levels of satisfaction with postal outlets (considered as an asset of universal service providers)
- Accessibility
  - Distance / time needed to reach the next postal outlet important for older people (e.g. in CH)
  - Location in the neighbourhood of shops preferred (e.g. in BE and PT)
- Opening days and hours
  - More flexibility and/or longer opening hours and more working days requested to facilitate late and weekend collection and delivery (particularly for parcels)

No one-size-fits-all for the postal universal service in the EU

- Analysis of most recent postal user surveys confirm conclusions of the 2016 ERGP report
- Broad variation of user needs for letter services between Member States
- High level of satisfaction with postal services
- E-commerce drives users‘ needs for parcel collection (returns) and delivery services
- Business users are more demanding than private users with regard to delivery frequency and speed of delivery while private users request more flexibility in collection and delivery time

Indications on future trends in postal user needs

- Letter services: Home delivery is broad consensus among individuals
- Parcel services: Doorstep delivery with some acceptance of alternative delivery points
- Postal outlets: More flexibility in opening hours and on weekends (relevant for registered items and parcels)
- Delivery frequency: Broad range from accepting less than five-day delivery of letters to keep it at five-/six day delivery
- Speed of delivery: Slower standard than D+1 acceptable for many, but users prefer having choice between D+1 and slower alternatives

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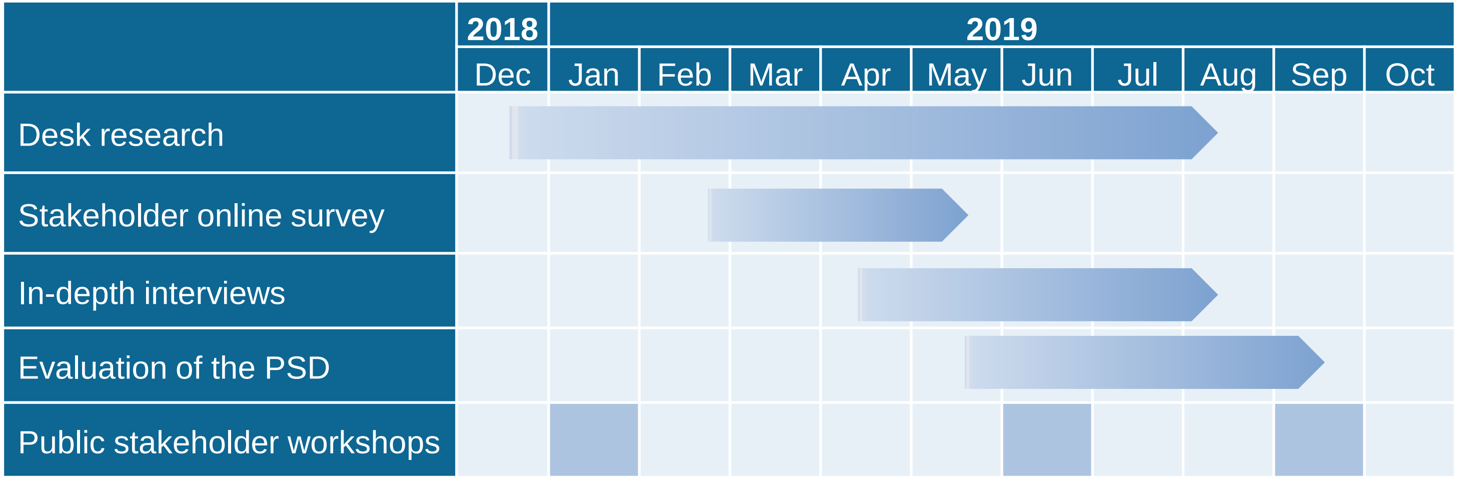
Emerging findings about user needs

- Member States apply very different concepts of USO, substantial flexibility today
- Literature review shows high overall satisfaction with current USO provisions – dependent on habits (but cognitive bias applies: postal users do not or cannot compare their situation to other countries)
- Social desirability bias applies: postal service is perceived as a positive cultural tradition and should remain as it is and for everyone (although the respondent himself might use it less than he wants to admit)
- Letters are still important for some user groups (large senders, SMEs, vulnerable users), and expected to remain important
- Postal users indicate they need postal outlets (esp. for e-commerce returns). Need for postal outlets also often driven by financial services

Content

Timeline



- 3rd public workshop: 17 September, Brussels
- Final report is due in September
- EC plans publication in autumn 2019

Next steps

- Mirror responses of postal users with studies and statistics on future trends and drivers in digital communication (e.g. broadband roll-out, use of internet, development of e-government services)
- Define needs and potential change of user behaviour in more detail
- Discuss needs of potentially vulnerable users
- Evaluate aspects of the regulatory framework

Today: Panel discussions with you on "Which postal services do tomorrow's users need?" and "Assessment of the Postal Services Directive" to gain further input for the studies findings

Agenda

09:00-09:30	Coffee and registration
09:30-10:00	Welcome and introduction (European Commission)
10:00-11:15	Interim findings from study on Postal user Needs/Evaluation of the Postal Services Directive (WIK-Consult), presentation and Q&A
11:15-12:45	Panel discussion: “Which postal services do tomorrow’s users need?” (moderated by Sonja Thiele, WIK-Consult)
12:45-13:45	Lunch break
13:45-15:20	Panel discussion “Assessment of the Postal Services Directive” (moderated by Alex Dieke, WIK-Consult)
15.20-15:30	Concluding remarks (European Commission)

Panel discussion: “Which postal services do tomorrow’s users need?”

Moderated by Sonja Thiele, WIK-Consult

- Simon Cowie, Chairman, Mail Boxes Etc. Limited (UK)
- Martin Salamon, Chief economist, Danish Consumer Council (DK)
- Jack Hamande, Member of the Council, BIPT (BE)
- Cathrine Grimseid, Senior Adviser, NKOM (NO)
- Kereto Gormsen, Policy Advisor, EMOTA
- Brian Palmer, Amazon

Panel discussion "Assessment of the Postal Services Directive"

Moderated by Alex Dieke, WIK-Consult

- Joos Francke, Team manager, ACM (NL)
- Philip Groves, Senior Associate, Ofcom (UK)
- Jan-Bart Henry, PostNL & PostEurop
- Mark van der Horst, Director EU Affairs, UPS Europe
- Prof. Alexandre de Streel, CRIDS/Namur University (BE)

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