



ERGP REPORT ON CORE INDICATORS FOR MONITORING THE EUROPEAN POSTAL MARKET

17 DECEMBER 2019

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1. EXECUTIVE SUMMARY

The European Regulators Group for Postal Services (ERGP) considers it to be of significant importance to provide information about the postal market developments in the ERGP Member countries. Extended knowledge about market developments is key in the context of full market opening, in order to ensure that it continues to benefit all users, both consumers and businesses. Having updated information on market developments is also of importance to National Regulatory Authorities (NRAs), in order to allow them to properly perform their regulatory duties, in particular the obligations that arise from the Postal Services Directive¹.

Monitoring the European postal market is also essential in the context of ERGP's task of assisting the European Commission regarding the development of the internal market for postal services and in the consistent application of the regulatory framework for postal services.

In this framework, ERGP has identified specific indicators to monitor market developments and has been working on collecting data on these indicators. The objective of this benchmarking exercise is to provide information about core indicators of the European postal market based on information collected with NRAs while also identifying trends and main market developments.

The report is based on the replies of the 33 countries² to a questionnaire requesting data for the period from 2014 to 2018, complemented with information provided by the countries in previous ERGP questionnaires. The conclusions of the report therefore reflect these data taking into account the period from 2014 to 2018. Data presented in this report may differ from data presented in reports from previous years, due to the review of the data by NRAs. In particular, differences in the available information (resulting from having more or less NRAs replying to the questionnaires) in each year strongly influences the information that can be presented.

The report is organized according to the following structure: (i) prices, (ii) market structure, (iii) volumes, (iv) revenues, (v) employment, (vi) postal network and (vii) investment.

- **Prices**

In 2018, the European average price for posting a domestic priority letter of 20 grams was €0.91, at an annual nominal growth rate of 9.3% between 2014 and 2018. During this period, the highest nominal price increase happened in the Southern countries (86%), while the Eastern countries had the lowest (23%).

¹ Directive 97/67/EC of the European Parliament and of the Council of 15 December 1997 on common rules for the development of the internal market of Community postal services and the improvement of quality of service modified by the Directive 2002/39/EC of 10 June 2002 and the Directive 2008/06/EC of 20 February 2008.

² For Iceland we just have data for the period 2014-2017.

For the non-priority domestic letter in 2018 the average price was €0.64, a 1.8% increase compared to the previous year. There is a different pricing policy amongst countries that offer both priority and non-priority letter post service. Three countries have an exceptional high price difference: Denmark, Italy and Croatia.

In 2018, the average European price for posting a letter weighing less than 20 gr from one country to another EU country was €1.34. As compared to 2017, this represents a price increase of 6.4%. While Denmark showed the highest price (€3.62) in 2018, North Macedonia had the lowest (€0.58). The international priority letter is, on average, about 68% more expensive than a domestic priority letter.

In 2018, the European average price for posting a domestic parcel provided by the USP/incumbent was €6.14, which represents a 2.2% annual nominal price increase between 2014 and 2018. Considering geographical clusters, during this period, the cluster of Western countries had the highest price for posting a domestic parcel.

The average price for posting an international parcel provided by the USP/incumbent within Europe in 2018 was €18.60, which represents a 0.4% annual nominal price variation between 2014 and 2018. When looking at the majority of the countries, the international priority parcel is, on average, about 356% more expensive than a domestic priority parcel.

The EC data collected under the provisions of the cross-border parcel regulation EU 2018/644 shows that the standard deviation for the price of a product is more significant within national markets than between European USP. This is due to the existence of some very high prices in the countries for high value-added products, being the USP prices much closer to the minimum prices than to the maximum prices. Moreover, the USP prices for a 2kg international parcel can significantly deviate from the minimum price in its own market, from 0% (meaning that the USP is the cheapest, as is the case of Luxembourg) to over 3 times higher as in Czech Republic. The current EC dataset does not allow for a more detailed product sampling and not all the operators provided the data, as a result, price comparison is difficult.

- ***Market structure***

In the period 2014-2018 there has been a slight increase in the number of active providers at a European scale. The more significant increase derives from the Southern cluster of countries, which accounts for 1103 new active PSP in 2018, when compared to 2014 (5.5%). The highest absolute increase in terms of the number of active PSP in this period was registered in IT, with an increase of 587 active PSP (24%).

When looking at the variation between 2017 and 2018 it is observable that the variations are not as significant, with only five countries showing an absolute variation greater than 10%: CZ, IE, LV and SI.

The Herfindahl-Hirschman index (HHI) analysis shows that the European postal market is highly concentrated. In addition, it can be observed that, on average, the Eastern countries have a lower level of concentration than other countries. Data also shows that, in general, the level of concentration of the

market is higher in terms of volumes than revenues. Variations in the level of HHI are not very significant in 2017-2018, which could point to a certain stabilization of the market structure.

The number of PSP with more than 1% of the total postal market reinforces the conclusions regarding the concentration of the postal market in Europe. It is worth noting that the number of providers with more than 1% of the market is increasing in the Eastern countries, in terms of volume.

There is a correlation between the number of providers and the existence of providers with more than 1% of the market share, but that correlation is not so strong as expected and there are very diverse country cases at the European level. For example, some countries, even not having a very significant number of active providers, have a significant number of providers with more than 1% market share (the case of CY, with 20 providers and 10 with more than 1% market share). By other hand, there are countries with a high concentration of the market, even when the number of active providers is noteworthy, such as the case of Belgium (700 providers, 1 with more than 1% market share).

As to market share evolution, the USP generally maintains a high market share, in terms of volumes, for letters (in 2018 it was about 89%). The USP market shares, in terms of volumes, regarding parcels are generally lower (around 28%). The conclusion applies to market shares in terms of revenues: the USPs' share regarding letters has mostly remained stable around 90%, while for parcels has been around 27%.

- **Volumes**

Total traffic volume across ERGP countries has fallen, on average, by 3% in the period 2014-2018, which means a loss of around 10 billions of items. During this period, all regions registered a decline, which was more significant in the Southern cluster. In particular, letter mail volumes decreased in all the regional groups. In contrast, it is possible to observe a significant increase in parcel volumes observed for all regions in the same period.

Given the decrease in letter volumes and the increase in parcels, the proportion of parcels in total volumes is increasing, from 9% on average in 2014 to 13% in 2018.

In terms of per capita, there was a decrease of the number of items per capita, from 157 in 2014 to 135 in 2018. Although parcels are clearly an area of growth, parcel volumes per head of population are still far lower than letters volume per head (117 letters against and 18 parcels per capita on average in 2018).

- **Revenues**

Looking into revenues, the trends in terms of evolution give a different story. Total revenues increased by 1% between 2014 and 2018 (increase of three billions euros), due to the increase of the parcel revenues (9%) that compensates the loss of letters (-3%).

When looking at trends in revenue per head of population, there was an increase of 1% between 2014 and 2018 (nearly €4 per capita). Letter revenues, on average decreased 4% while the parcel revenues increased, on average, 8% between 2014 and 2018.

The average revenue per item increased 4% between 2014 (€0.99) and 2018 (€1.15). In particular, it is also of note that the revenue per letter item increased across the majority of countries between 2014 and 2018, and that the average revenue per parcel item is significantly higher than for letters (€0.59 for letters compared to €5.12 in 2018).

- ***Postal network***

In the period 2014 and 2018 the total number of postal establishments decreased 4.5%, with an increase in the number of USP establishments (0.3%) and a decrease in the number of postal establishments of OPSP (-11.9%).

When looking at the distribution of postal establishments according to area and to population, it can be observed that the number of USP postal establishments per 100km² is very heterogeneous amongst ERGP countries, as well as regarding the number of OPSP postal establishments. This also occurs when analysing the ratio of postal establishments per 10 000 people. Taking into account the countries that were able to provide data, in 2018 only in four of them the number of USP postal establishments per 100km² is higher than 5 (CH, CY, DE, MT) while only in 3 of the countries the number of OPSP postal establishments is higher than 5 (BE, DE and MT). As to the number of postal establishments per 10 000 people, this ratio ranges from 0.9 postal establishment per 10 000 people in NL to 12.7 in CY for the USP, and from 0.03 postal establishments per 10 000 people in IS to 5.1 in BE for the OPSP.

As to parcel lockers, for the majority of countries for which there are data, the number of parcel lockers is increasing. This is particularly relevant in the case of USP parcel lockers, which have witnessed a significant percentage increase in most countries, with the most significant increase happening in EE (94%). Data on the number of OPSP parcel lockers also seems to point to an increase. According to the available data, the greatest number of OPSP parcel lockers is present in PL, where the increase between 2014 and 2018 is also the one of the highest (67%).

- ***Employment***

Across all of the countries that were able to report data for the USP and the OPSP, total employment decreased approximately 3.5% between 2014 and 2018. This is mainly due to the evolution of the number of people employed by the USP, which has decreased approximately 5.6% during this same period. On a different direction, the number of people employed by OPSP increased by approximately 3.2%.

Considering all of the countries for which there is information, on average the share of the USP employment on the total postal employment decreased from 79.9% in 2014 to 77.4% in 2018. Moreover,

the USP continues to have more employees than the OPSP for the majority of countries analysed, being the exceptions CY, DE, DK and EL.

In the majority of ERGP countries for which data is available, the proportion of employment within the USP regarding total country employment has declined since 2014, while regarding the share of employment by the OPSP on total country employment there is not a clear trend in the evolution, with decreases in some countries and increases in others. It should be noted, however, that the evolution in the share in total employment might be influenced not only by the employment in the postal sector itself, but also by the total employment of the country.

In the last years, postal providers are transferring the focus on investment to the parcels, and betting in the automation, on green forms of transport (Sustainability agenda). Given this, the USP and OPSP are investing in the sector, as it can be shown in the figure below. Nevertheless, data about Investment in the postal sector is very limited and few NRAs are collecting this data. The following table presents an overview of total investment by USP and OPSP in the countries who were able to provide this data.

- ***Investment***

The data available for investment is limited, but regarding the one available, it is remarkable that investment is a very unpredictable and variable indicator. In most of the countries, for the period 2014-2018 investment is increasing in both USP and OPSP. The highest increase by USP is in HR (359.2%), the highest increase by OPSP is in CZ (112.3%). Furthermore, it is worth mentioning that in most of the countries the total amount of investment in the postal sector by the USP outweighs the amount of investment in the postal sector by the OPSP.

2. INTRODUCTION

Having accurate and comparable information about the postal market and its developments is essential for NRAs to ensure that they perform their regulatory duties.

In particular, NRAs should ensure compliance with the obligations arising from the Postal Services Directive, in particular by establishing monitoring and regulatory procedures to guarantee the provision of the universal service (US) – Art. 22 (2). The Postal Services Directive also establishes that NRAs should monitor the evolution of the postal market by collecting specific information in order to perform their regulatory tasks. In this sense, the Postal Services Directive gives NRAs powers to request information from postal service providers (PSP) in order to carry out their tasks (Article 22a). It also states that, upon request, NRAs shall provide the European Commission with appropriate and relevant information necessary for it to carry out its tasks under the Postal Services Directive.

ERGP considers it is important to provide information about the postal market developments in the ERGP Member countries and, in light of this, one of ERGP's core tasks is to assist the European Commission in the development of the internal market for postal services and in the consistent application of the regulatory framework for postal services.

The supervision of market developments is key in the context of full market opening to ensure that it continues to benefit all users, both consumers and businesses. Monitoring the European postal market is also essential in order to guarantee the regulatory objectives of protecting end-users and promoting competition.

Taking into account the importance of NRAs having information about the postal market, the ERGP has identified specific indicators to monitor market developments, chosen based on their relevance³ and the review of its implementation by the NRAs⁴. These are generally related to the following main categories: market outcomes, market structure, volumes, revenues, employment, postal establishments and postal investment.

This benchmarking report provides information about core indicators of the European postal market based on information collected with NRAs while also identifying trends and main market developments.

The report is structured as follows:

- Section 3 presents aspects of the methodology used in the report;
- Section 4 presents data related to key core indicators:
 - Section 4.1: Prices;
 - Section 4.2: Market structure;
 - Section 4.3: Volumes;

³ ERGP (12) 32 Report on indicators to monitor the postal market.

⁴ ERGP (14) 25 Report on the implementation of the 2012 report on indicators to monitor the postal market.

- Section 4.4: Revenues;
- Section 4.5. Postal network;
- Section 4.6: Employment;
- Section 4.7 Investment.

In the Annexes to the report additional information is presented, which should be taken into account then considering the conclusions of the report:

- Annex 1 outlines the scope of services, including the definition of postal services and the services included within the scope of the US;
- Annex 2 identifies the NRAs' powers to collect data on the postal market and their practices regarding data collection;
- Annex 3 presents the country codes that are used throughout this report in order to identify specific countries.

3. METHODOLOGY

A questionnaire requesting data for the period 2014-2018 was sent to all ERGP members and observers NRAs. Replies were received regarding 33 countries: AT, BE, BG, CH, CY, CZ, DE, DK, EE, EL, ES, FI, FR, HU, HR, IE, IS⁵, IT, LU, LT, LV, MK, MT, NO, NL, PL, PT, RO, RS, SE, SI, SK, UK.

The replies to the questionnaire were the basis of the analysis, complemented, whenever necessary, with information from previous ERGP reports and additional data provided by the NRAs. The conclusions of the report therefore reflect these data taking into account the period from 2014 to 2018. All data used in the report derives from the replies to the questionnaires unless otherwise stated. Taking this into account, data presented in this report may differ from data presented in reports from previous years, due to limitations of the data collection process. In particular, differences in the available information (resulting from having more or less NRAs replying to the questionnaires) in each year strongly influences the information that can be presented.

NRAs did not collect data specifically for the purposes of this exercise – the data provided and used in the report is already collected by NRAs and is publicly available⁶. As such, it should be noted that the definitions of some indicators may not be the same for all countries and any comparisons should take into consideration the countries' specific notes and the definitions that are applicable in each country⁷. It

⁵ Only data until 2017.

⁶ Only public data is included in the report, confidential figures are not presented in an individual form.

⁷ Specific notes regarding each country are presented along the report; information on definitions is presented in an annex to the report.

should also be noted that the powers of NRAs to collect data on the market may affect the detail and the quality of the information provided⁸.

With the objective of identifying geographical trends, a clusters' analysis was made for some indicators using the following clusters⁹:

- 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, IS, MK, NO, RS.

It should also be noted that in some cases where a full set of data was not available it was necessary to estimate some values in a time series. This was conducted in two ways: where a data point is missing between two years, the mid-point between the years is used for the missing year. When data is missing at one of the extremes of the period considered, the value used is the one corresponding to the closest year for which there is a value. For the countries that didn't yet provide data for 2017 the last available year was considered.

In addition, whenever necessary, the exchange rates of 2016 as reported by Eurostat are used for currency conversions of the countries not using the Euro as national currency¹⁰.

⁸ A general overview of these powers is presented in an annex to the report.

⁹ Classification used in previous ERGP reports and in some of the postal studies commissioned by the European Commission. This classification follows also postal usage clusters.

¹⁰ Eurostat - Euro exchange rates - Annual data

<http://ec.europa.eu/eurostat/tgm/table.do?tab=table&init=1&language=en&pcode=tec00033&plugin=1>.

4. CORE INDICATORS

4.1. Prices

This section identifies the main market outcomes in terms of prices of the postal services. It considers the prices of the domestic priority and non-priority letters and the price of posting a priority letter within Europe, for the first weight step. It then goes on to identify the prices of the domestic priority parcel and the price of posting an intra-community priority parcel to the closest neighbour country.

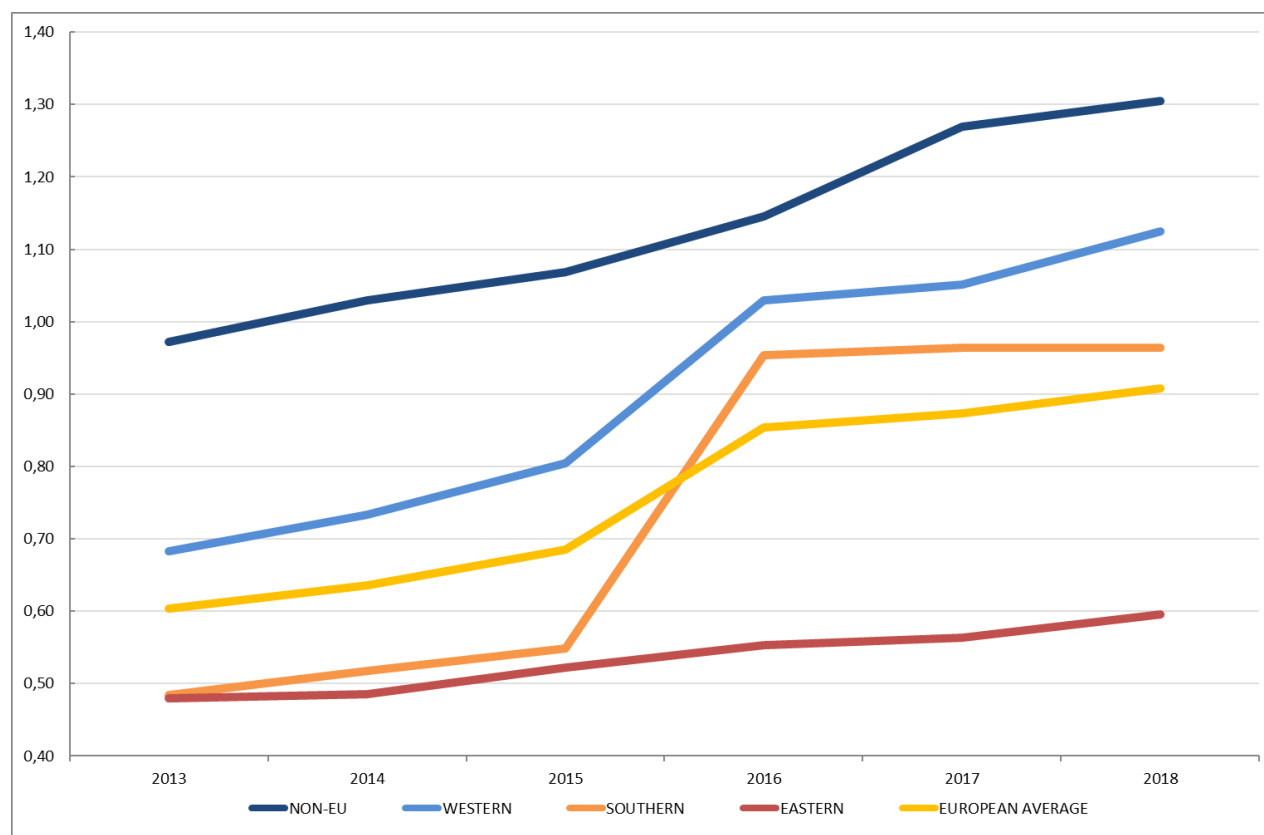
4.1.1. Letter price evolution in Europe

In 2018, the European average price for posting a domestic priority letter of 20 grams was €0.91,¹¹ which represents a 43% nominal price increase between 2014 and 2018, an annual nominal growth rate of 9.3%.

We can see in the figure below that although the upward trend in domestic priority letter prices continued in 2018, and it has been higher than in the two previous years, 3.9% in 2018 against 2.3% in 2017 and 2.5% in 2016. The Southern countries had the highest nominal price increase since 2014 (86%), while the Eastern countries had the lowest (23%). The sharp increase in price level for the Western Europe cluster between 2014 and 2016 was driven by Denmark (170% in 2015). The important rise in average price for the Southern cluster in 2016 was determined by Italy where the prices went up by 250% in 2016. The Western cluster had the highest price increase in 2018, driven mainly by Austria (17.6%) and France (11.7%).

¹¹ Median: €0.71.

Figure 1 – Average prices of posting a domestic priority letter (20 grams) – euros



Notes:

1. Average prices for the 28 countries that offer priority letter post service. ES, MK, SE, RS and FI are not included, since there is only one category of letter post without differentiation between 'priority' and 'non-priority' service in D+3. Data for IS in 2018 is missing.
2. Standard postal items provided by the USP/Incumbent at single piece tariff for typical residential customers.
3. First Class/Priority: For services to be delivered on the following working day (according to the service conditions published or informed by the PSP) – D+1. Corresponds to the service usually provided in the scope of the US.
4. Prices are in Euros, on 1 January of each year. The exchange rates of 01/07/2018 were applied on all previous years in order to filter out changes of these exchange rates over the years.
5. Prices in NO includes 25% VAT.

The average price for posting a 20 grams international letter within Europe in 2018 was €1.34,¹² a 6.4% increase compared with the previous year. For the period of 2014 to 2018, this price increased by €0.42, a 9.75% annual average nominal increase.

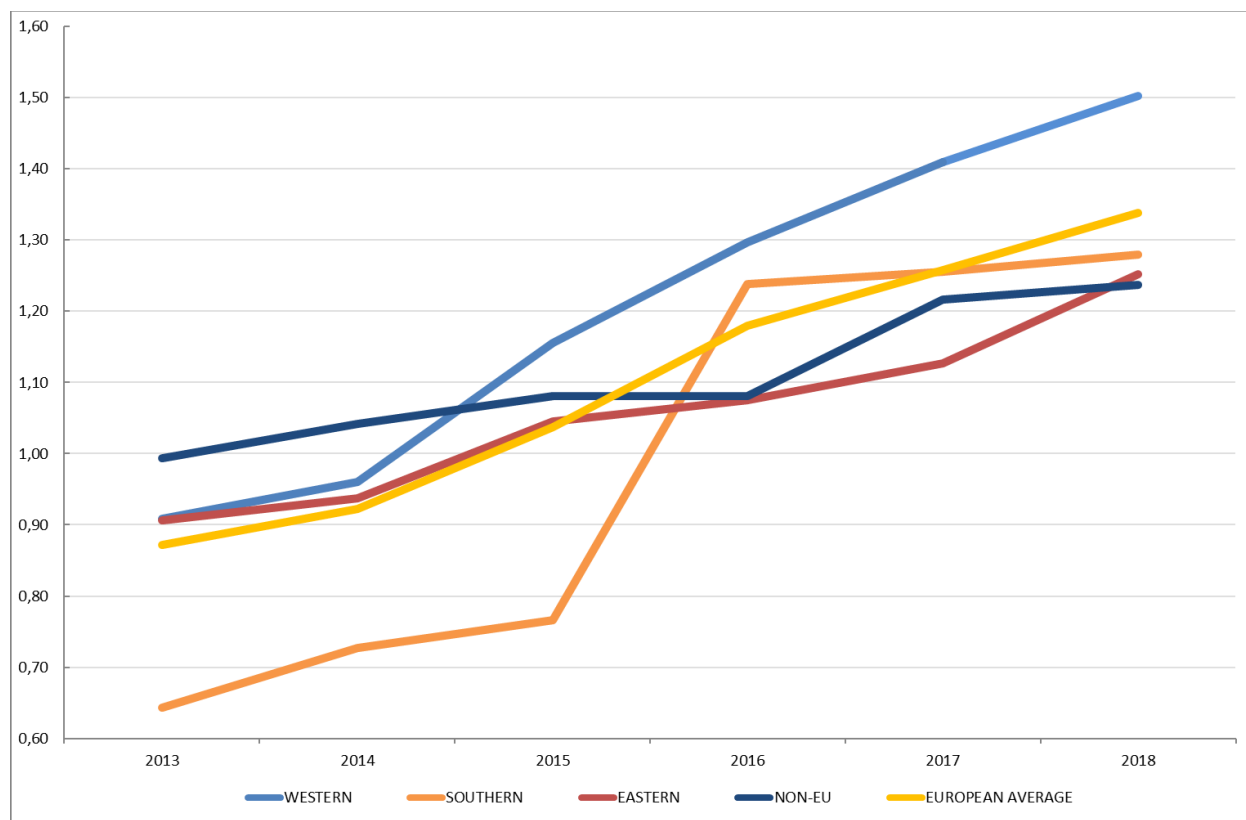
Similar to the previous graph, the sharp increase in the Southern cluster's price in 2016 is due to the price increase in Italy from €0.95 in 2015 to €3.50 in 2016.

One might wonder why the average international priority letter price of the countries outside the EU is lower than the average domestic priority letter price for the same country cluster. This counterintuitive observation is because North Macedonia and Serbia do not have a domestic priority letter service, driving

¹² Median: €1.40.

the average for this cluster up for the remaining three countries (Switzerland, Iceland and Norway). If one were to consider only the latter countries, the average international priority letter price would increase to €1.67 for 2018.

Figure 2 – Average price for posting a 20 grams international priority letter within Europe – euros



Notes:

1. Average prices for the 33 countries.
2. Standard postal items provided by the USP/Incumbent at single piece tariff for typical residential customers.
3. First Class/Priority: For services to be delivered on D+3 (according to the service conditions published or informed by the PSP). Corresponds to the service usually provided in the scope of the US.
4. Prices are in Euros, on 1 January of each year. The exchange rates of 01/07/2018 were applied on all previous years in order to filter out changes of these exchange rates over the years.
5. Price in NO includes 25% VAT.
6. Price in SI includes 22% VAT.

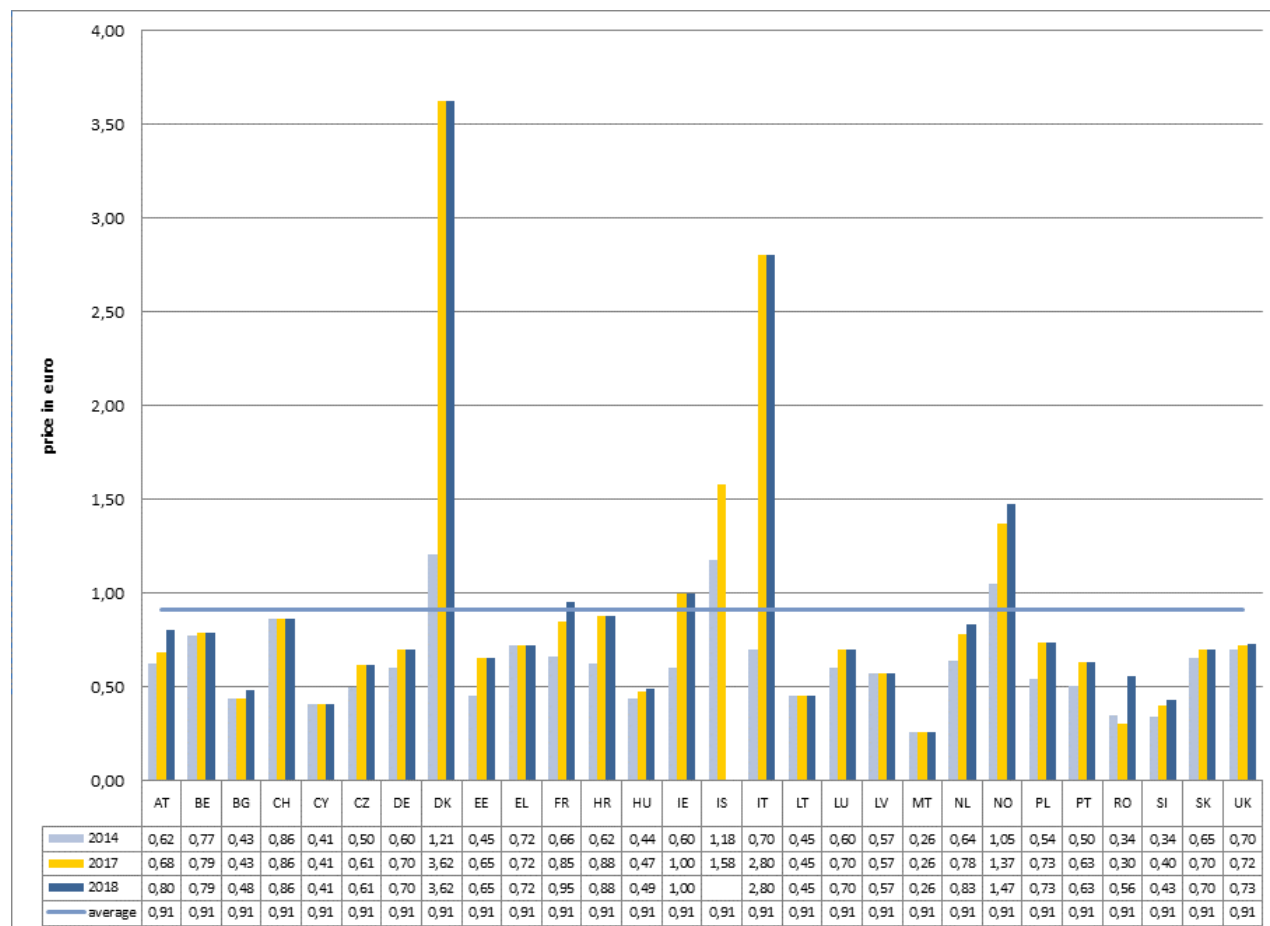
4.1.2. Domestic letter prices

Most European countries have a price level below the average (€0.91); this is due to two countries having very high prices, Denmark (€3.6) and Italy (€2.80) who are taking the average upwards.¹³ In contrast to those high price levels, Malta has the lowest price (€0.26), as shown in the figure below. The highest

¹³ Median: €0.70

increase in 2018 was in Romania (nominal increase of €0.26). Between 2014 and 2018 Switzerland, Cyprus, Greece, Malta, Latvia and Lithuania have not changed the price of their domestic priority letter post.

Figure 3 – Price of Domestic Priority Letter (20 gr) in 2014, 2017 and 2018



Notes:

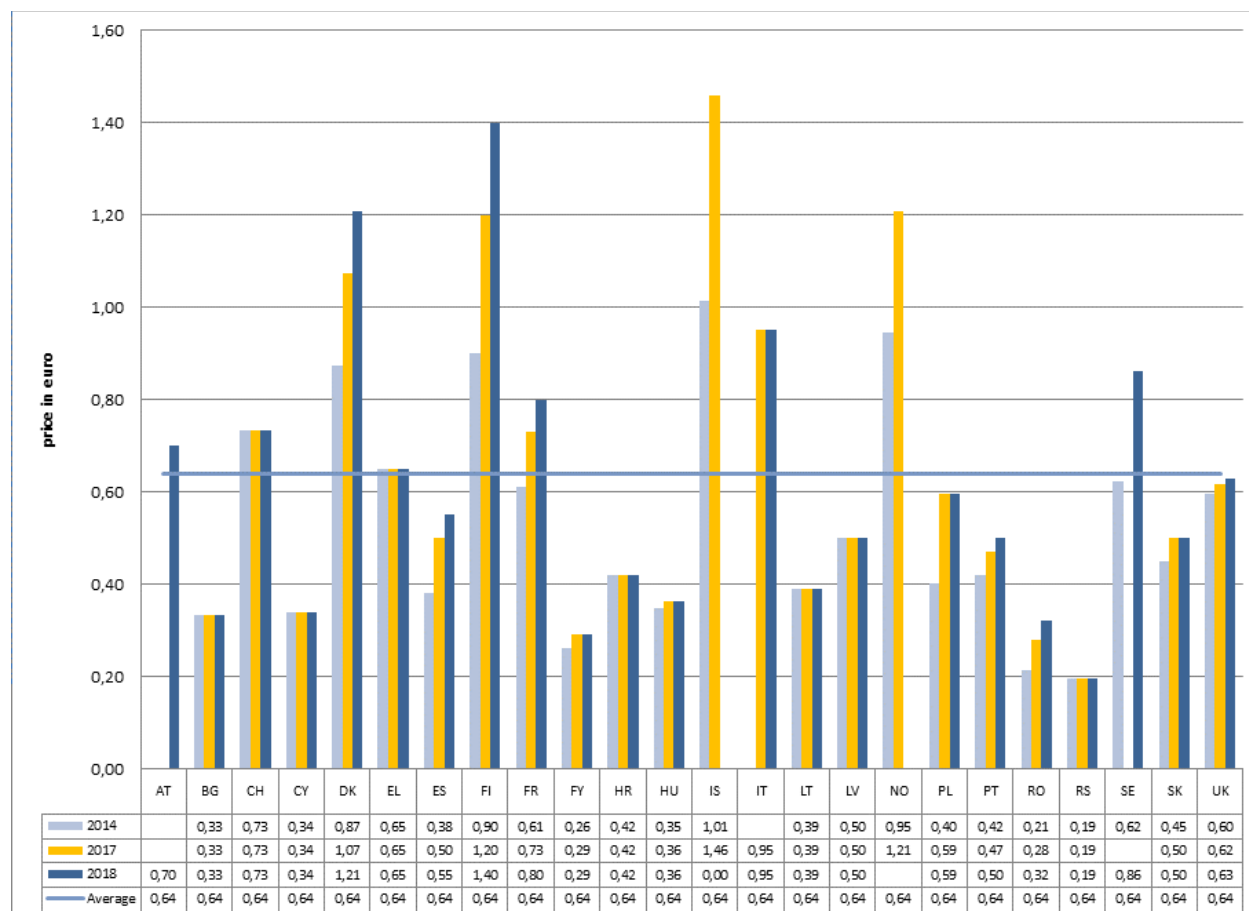
1. Average prices for the 29 countries that offer priority letter post service. ES, MK, RS, UK and FI are not included, since there is only one category of letter post without differentiation between 'priority' and 'non-priority' service in D+3.
2. Standard postal items provided by the USP/Incumbent at single piece tariff for typical residential customers.
3. First Class/Priority: For services to be delivered on the following working day (according to the service conditions published or informed by the PSP): D+1. Corresponds to the service usually provided in the scope of the US.
4. Prices are in Euros, on 1 January. The exchange rates of 01/07/2018 were applied on all previous years in order to filter out changes of these exchange rates over the years.
5. Price in NO includes 25% VAT.

In 2018, the average price in Europe for posting a domestic non-priority standard letter was €0.64,¹⁴ a 1.8% increase compared to 2017 (€0.63). It should be highlighted that the following countries do not offer a non-priority service: Belgium, Czech Republic, Germany, Estonia, Ireland, Malta, The Netherlands, Slovenia, Luxembourg and Norway.

¹⁴ Median: €0.50.

In 2018, Finland had the highest price (€1.40), and Serbia the lowest (€0.19). Between 2014 and 2018, Bulgaria, Switzerland, Czech Republic, Greece, Croatia, Lithuania and Latvia are the only countries that have not changed the price of their non-priority letter service.

Figure 4 – Price of Domestic Non-Priority Letter (20 gr) in 2014, 2017 and 2018



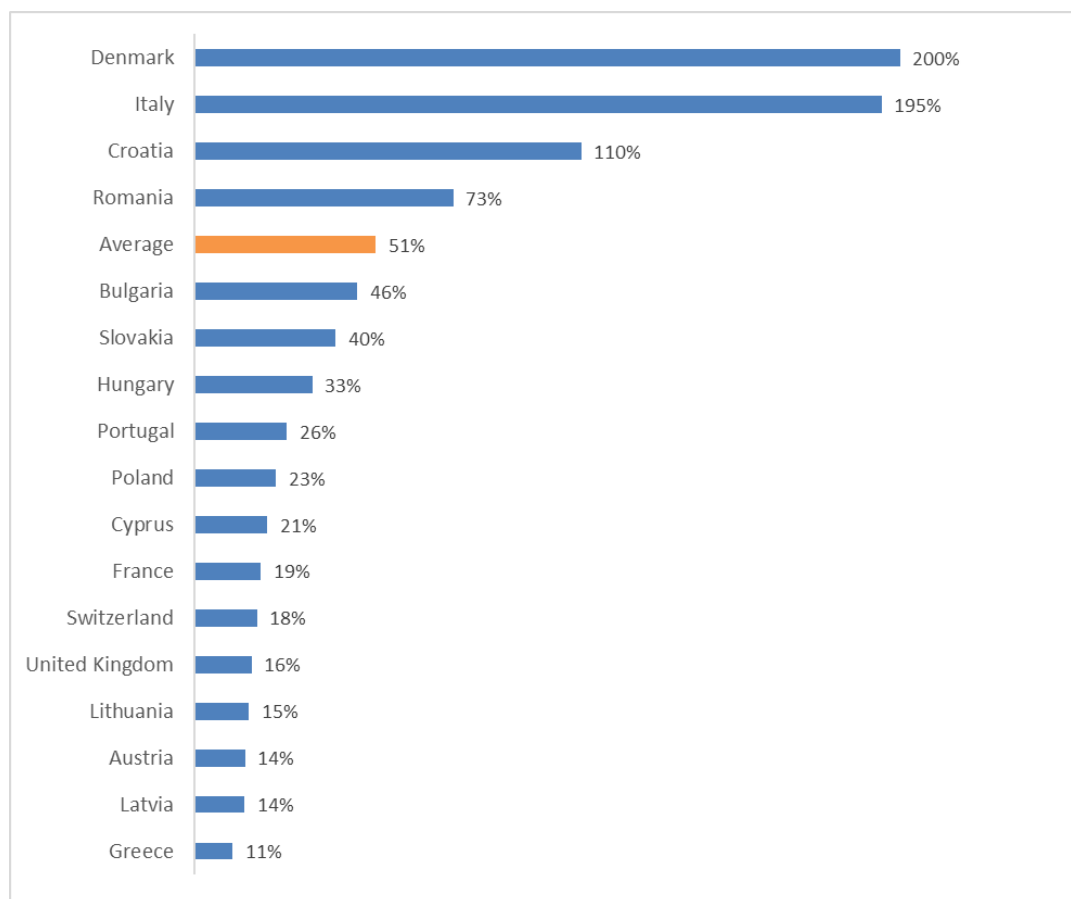
Notes:

1. Average Price for the 24 countries that offer non-priority letter post service. Non-priority letter post service is not applicable in BE, CZ, DE, EE, IE, MT, NL, LU, NO and SI.
2. Standard postal items provided by the USP/Incumbent at single piece tariff for typical residential customers.
3. Second Class/Non-Priority: For services to be delivered on D+3 (according to the service conditions published or informed by the PSP). Corresponds to the service usually provided in the scope of the US.
4. SE, FR and LT have a delivery speed of D+2.
5. DK has a delivery speed of D+5 and IT D+4.
6. In Belgium, the non-priority letter service was only available for professional end users.
7. Prices are in Euros, on 1 January. The exchange rates of 01/07/2018 were applied on all previous years in order to filter out changes of these exchange rates over the years.

There is a different pricing policy amongst countries that offer both priority and non-priority letter service. Three countries have an exceptional high price difference, with a price difference above 100%: Denmark, Italy and Croatia.

The two countries showing the biggest differences between priority and non-priority are Denmark and Italy, who had significant price increases for their priority letters in the last years. Generally when both services are offered, prior and non-prior, there is a shift of volumes from priority items to non-priority items in domestic traffic which consequently higher the costs incurred by the execution of that service.

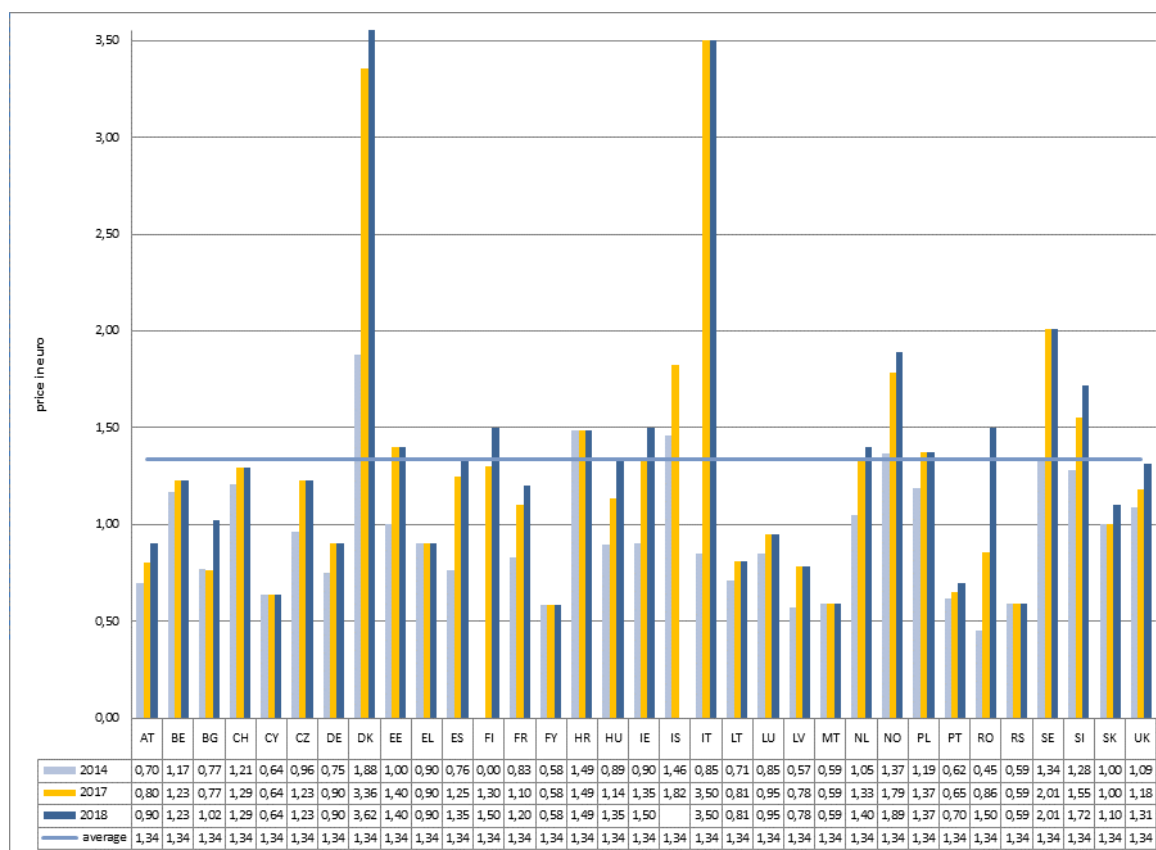
Figure 5 – Price difference between priority and non-priority domestic letters in 2018 (%)



4.1.3. International letter prices

In 2018, the average European price for posting a letter weighing less than 20 gr from one country to another EU country was €1.34.¹⁵ Compared to 2017 (€1.26), this represents a price increase of 6.4%. Denmark shows the highest price (€3.62) in 2018, North Macedonia had the lowest (€0.58). As for priority letters, most of countries have prices below the average which is again taken upwards by Denmark and Italy.

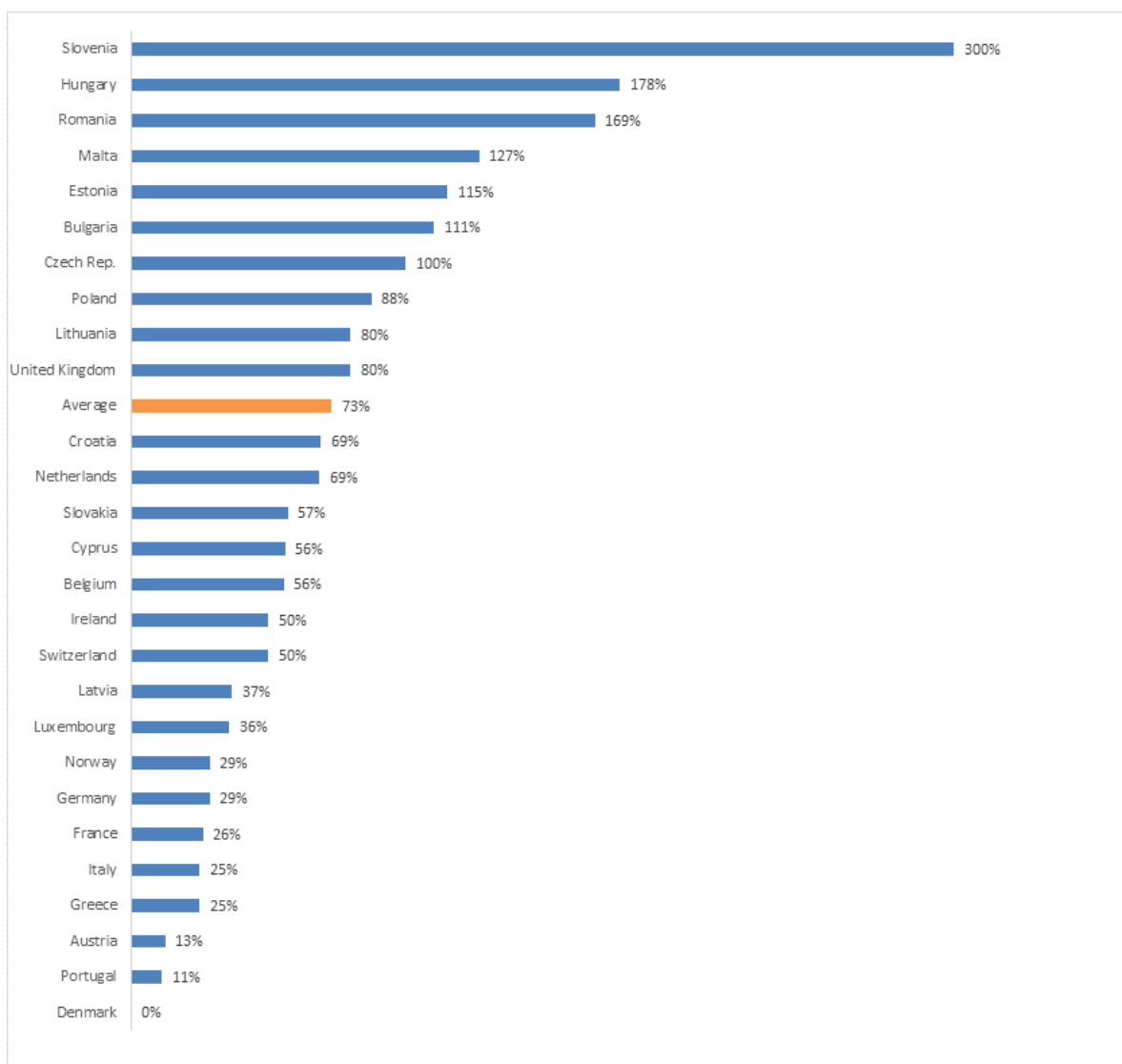
¹⁵ Median: €1.26

Figure 6 – Average price for posting an international priority letter of 20 gr within Europe in 2014, 2017 and 2018**Notes:**

1. Average price for the 33 countries.
2. Standard postal items provided by the USP/Incumbent at single piece tariff for typical residential customers.
3. First Class/Priority: For services to be delivered on D+3 (according to the service conditions published or informed by the PSP). Corresponds to the service usually provided in the scope of the US. Except for Denmark and Portugal, D+5.
4. Prices are in Euros, on 1 January. The exchange rates of 01/07/2018 were applied on all previous years in order to filter out changes of these exchange rates over the years.
5. Price in SI includes 22% VAT.

Looking at the price difference between international priority letter post and domestic priority letter post, we can see that Slovenia is a clear outlier with an international priority letter price that is 3 times higher than the domestic priority letter price. When looking at the other countries, the international priority letter is, on average, about 73% more expensive than a domestic priority letter.

In Denmark the priority letter has the same price as an international priority letter (costing €3.62), the reason is that it is the country showing the highest price for priority letters and that it is also one of the only countries offering a D+5 international priority letter instead of D+3 like most of the countries.

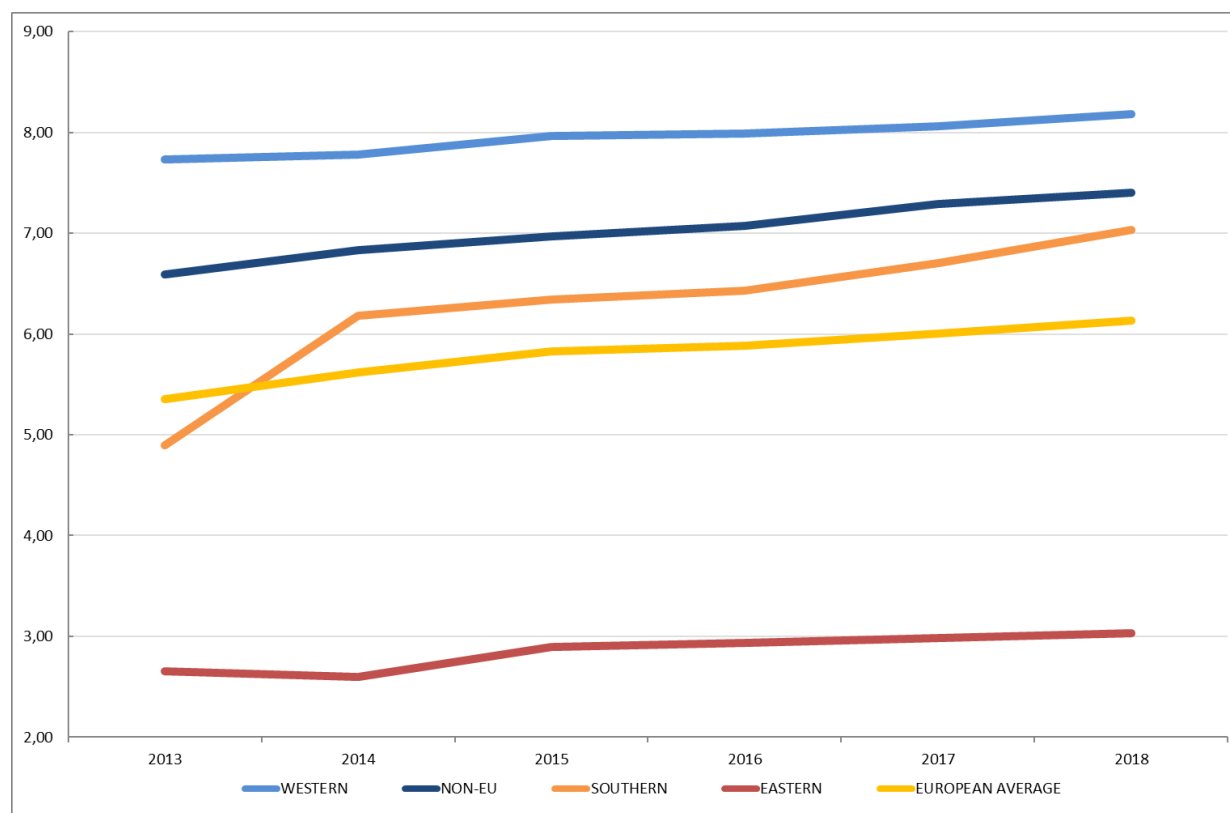
Figure 7 – Price difference between international priority and domestic priority letters in 2018 (%)

4.1.4. Parcel price evolution in Europe

In 2018, the European average price for posting a domestic parcel provided by the USP/incumbent was €6.14 against €6.00 in 2017,¹⁶ which represents a 2.2% nominal price increase. Considering geographical clusters, during this period, the cluster of Western countries had the highest price for posting a domestic parcel. The southern Europe cluster shows an upward trend due to the price increase of Malta, going from €2.93 in 2013 to €9.00 in 2014 and the price increase of Spain from €10.50 in 2017 to €12.08 in 2018. The Eastern cluster has again much lower prices.

¹⁶ Median: €4.86.

Figure 8 – Average prices of posting a 2 kg domestic parcel provided by the USP/incumbent – euros



Notes:

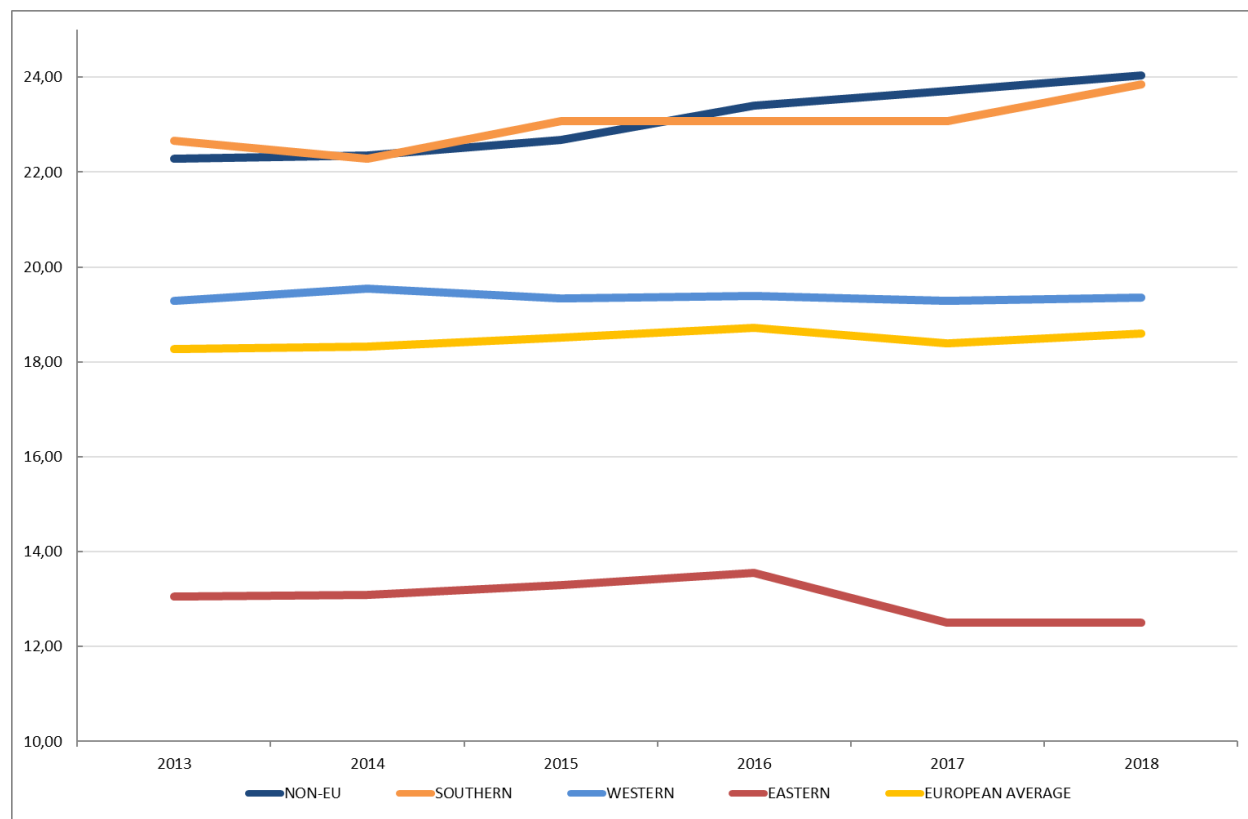
1. Average Price for the 33 countries.
2. Standard postal items provided by the USP/Incumbent at single piece tariff for typical residential customers.
3. First Class/Priority: For services to be delivered on D+3 (according to the service conditions published or informed by the PSP). Corresponds to the service usually provided in the scope of the US.
4. BE, EE and UK have a delivery speed of D+1. AT, BG, FR, CH, CZ, EL, RO, IE, MT, LT, RS and HU have a delivery speed of D+2. IT has a delivery speed of D+4.
5. Prices are in Euros, on 1 January. The exchange rates of 01/07/2018 were applied on all previous years in order to filter out changes of these exchange rates over the years.
6. Price in NO includes 25% VAT.

In 2018, the average price for posting an international parcel provided by the USP/incumbent within Europe was €18.60,¹⁷ against €18.39 in 2017 and €18.32 in 2014, this brings the average annual nominal growth since 2014 at 0.38%. Behind this small increase in prices, we observe some asymmetry in the evolution of prices between the different geographical clusters; prices are rather diverging than converging between geographical clusters. The decrease in price levels in 2017 for the eastern cluster is due to Romania (-54%).

Furthermore, it is worth noting that, opposite to the domestic parcel, the cluster of countries outside the EU has the highest average price for posting a 2kg international parcel, as shown in the figure below.

¹⁷ Median: €16.50.

Figure 9 – Average prices for posting a 2kg international parcel provided by the USP/incumbent to the closest neighbouring country within Europe – euros



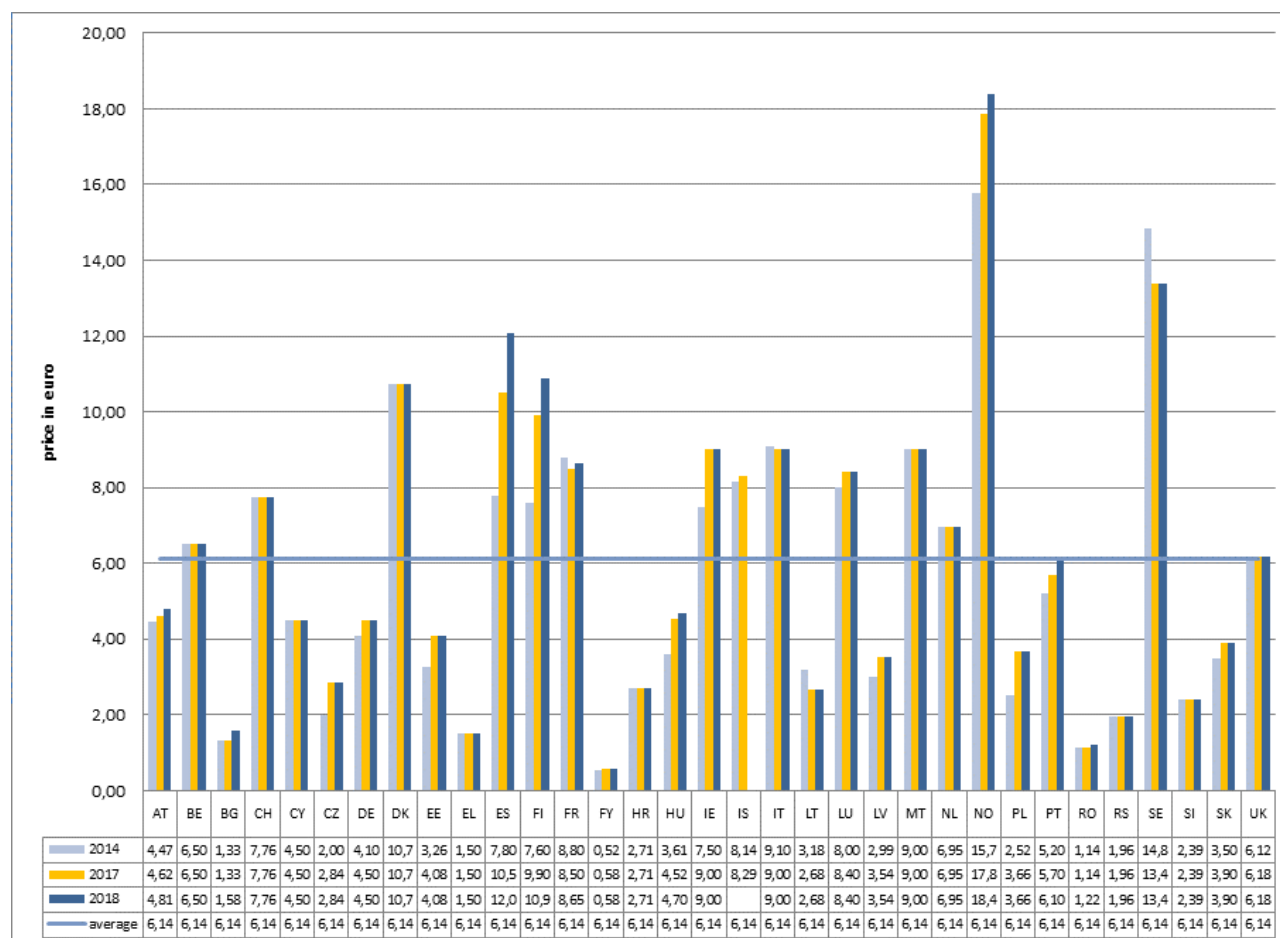
Notes:

1. Average prices for the 33 countries.
2. Standard postal items provided by the USP/Incumbent at single piece tariff for typical residential customers.
3. First Class/Priority: For services to be delivered on D+5 (according to the service conditions published or informed by the PSP). Corresponds to the service usually provided in the scope of the US. FR and Spain have a delivery speed of D+3 to D+5 and Italy a delivery speed of D+10 to D+15.
4. Prices are in Euros, on 1 January. The exchange rates of 01/07/2018 were applied on all previous years in order to filter out changes of these exchange rates over the years.

4.1.5. Domestic priority parcel prices

In 2018, Norway had the highest price for posting a domestic 2 kg priority parcel (€18.4) while North Macedonia had the lowest (€0.58), as shown in the figure below, which indicates a very wide intra-European range of prices for the same type of product.

Moreover, it is worth mentioning that over the last four years (2014-2018), Belgium, Switzerland, Cyprus, Denmark, Croatia, Malta, Netherlands, Serbia and Slovenia have not increased the price of the domestic priority parcel post.

Figure 10 – Price of posting a domestic 2 kg priority parcel in 2014, 2017 and 2018


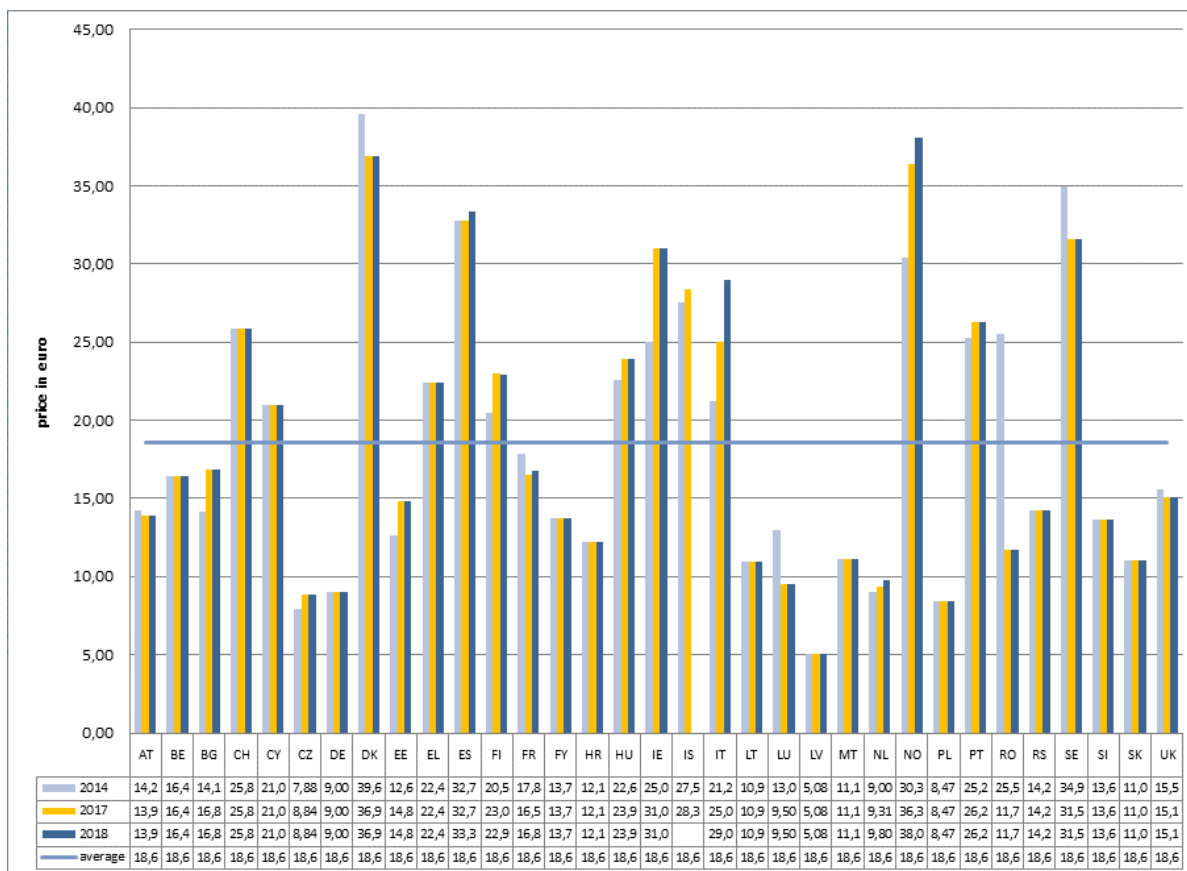
Notes:

1. Average prices for the 33 countries.
2. Standard postal items provided by the USP/Incumbent at single piece tariff for typical residential customers.
3. First Class/Priority: For services to be delivered on D+3 (according to the service conditions published or informed by the PSP). Corresponds to the service usually provided in the scope of the US.
4. BE, EE and UK have a delivery speed of D+1. RO, AT, BG, CH, CZ, IE, EL, LT, MT, RS, FR and HU have a delivery speed of D+2. IT has a delivery speed of D+4.
5. Prices are in Euros, on 1 January. The exchange rates of 01/07/2018 were applied on all previous years in order to filter out changes of these exchange rates over the years.
6. Price in NO include 25% VAT.

4.1.6. International priority parcel prices

In 2018, the average European price for posting an international priority parcel weighting 2 kg to the cheapest zone within Europe was €18.60, which represents a price increase of 1.1% compared to 2017. As can be observed in the figure below, Denmark had the highest price (€37) in 2018, while Latvia had the lowest (€5.08). It is worth noting that 6 countries have seen their price decrease.

Figure 11 – Price of posting a 2 kg international parcel provided by the USP/incumbent within Europe (cheapest zone)¹⁸ in 2014, 2017 and 2018



Notes:

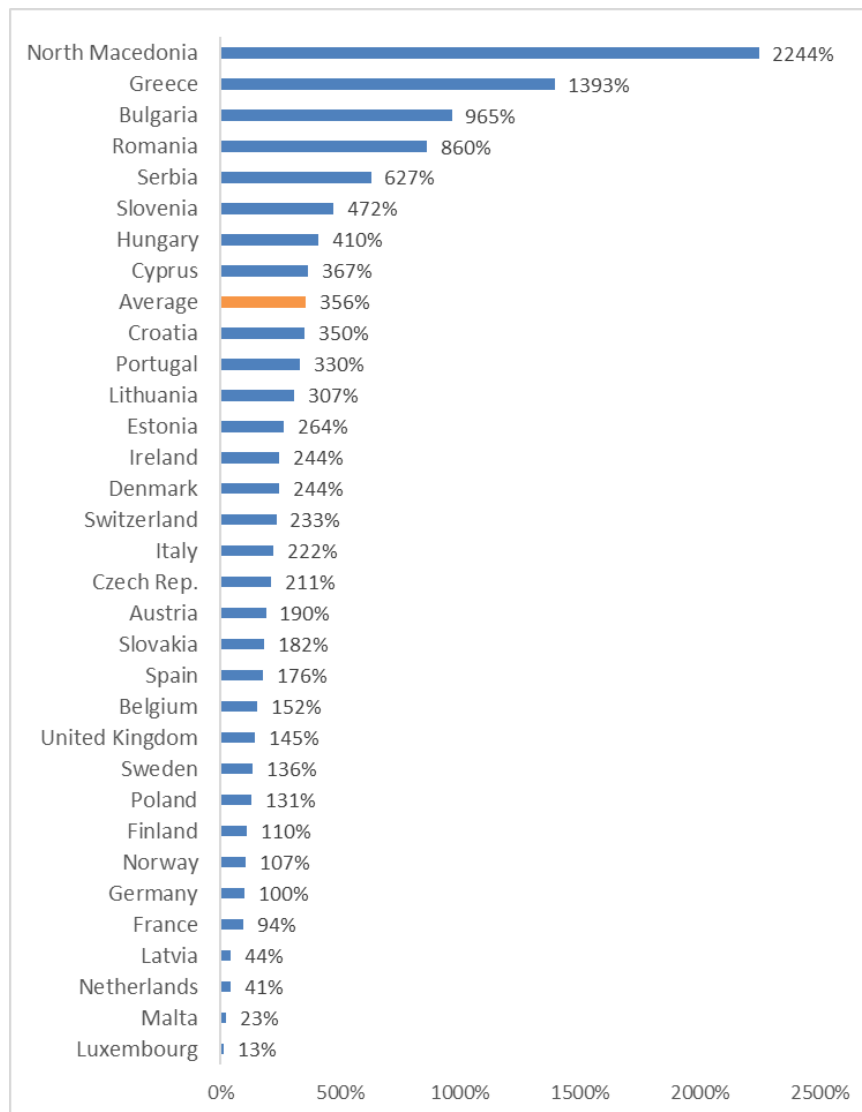
1. Average prices for the 33 countries.
2. Standard postal items provided by the USP/Incumbent at single piece tariff for typical residential customers.
3. First Class/Priority: For services to be delivered on D+5 (according to the service conditions published or informed by the PSP). Corresponds to the service usually provided in the scope of the US.
4. FR and Spain have a delivery speed of D+3 to D+5; IT D+10 to D+15
5. Prices are in Euros, on 1 January. The exchange rates of 01/07/2018 were applied on all previous years in order to filter out changes of these exchange rates over the years.

Looking at the price difference between international priority parcel post and domestic priority parcel post, we can see that there are some clear outliers. In Greece, the high price gap stems from the fact that domestic parcel prices were temporarily discounted. The prices, therefore, will increase within a certain period, reducing the price gap between domestic and international parcels. In North Macedonia an international priority parcel is over 20 times more expensive than a domestic priority parcel. When looking to all the Europe, the international priority parcel is, on average, about 356% more expensive than a domestic priority parcel. We observe that generally the price difference between domestic and international is higher for parcels than for letters, the reason might be that domestic priority letters tend

¹⁸ From this year on the report will look not at the cheapest neighbouring country, but rather at the first (so the cheapest) price zone.

to have a higher premium due to the D+1 aspect, diminishing thereby the difference with the international priority letter which on average is D+3.

Figure 12 – Price difference between international priority and domestic priority of 2kg parcels in 2018 (%)



4.1.7. EC prices sample, minimum, maximum and USP prices for a 2 kg international parcel

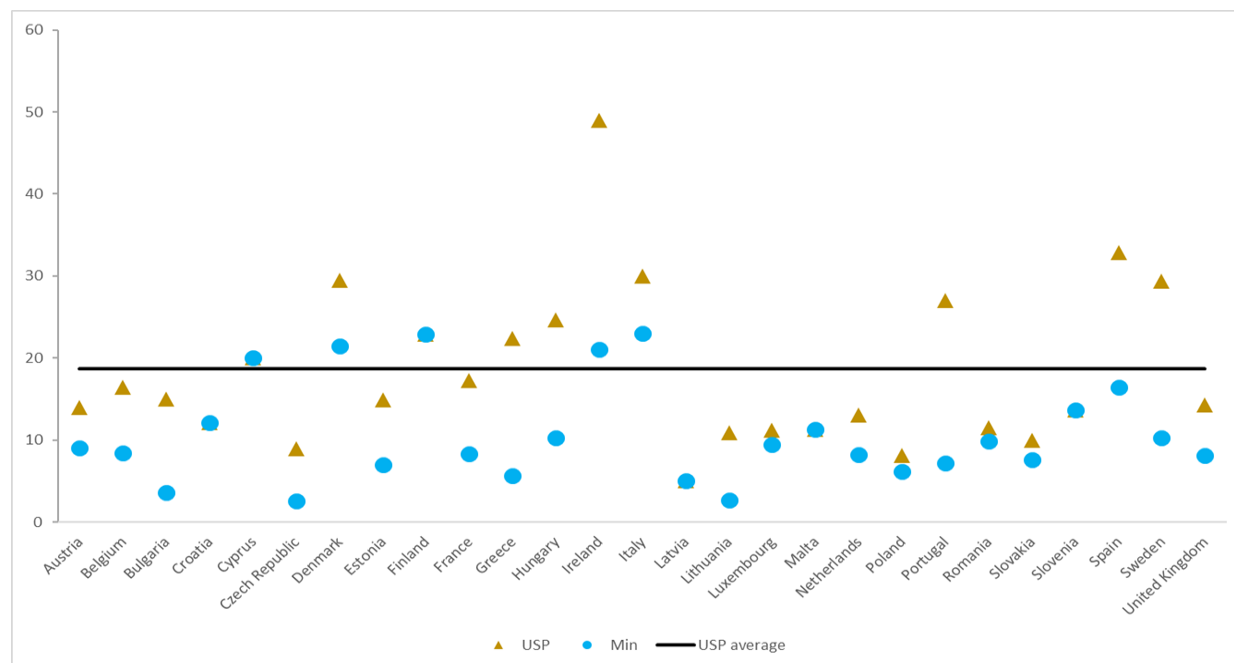
In line with the cross-border parcel regulation EU 2018/644, additional information was gathered for the cross-border prices (EC data). The EC data shows that the standard deviation for the price of a product is more significant within national markets than between European USP. This is due to the existence of some very high prices in the countries for high value-added products, being the USP prices much closer to the minimum prices than to the maximum prices. This might seem counterintuitive as it could be assumed that the USP benefits from some market power on USO products. One explanation is that implies that the

scope of products has to be reduced by eliminating the most high value added products as they differ from the standard USO products.

We notice that the USP prices for a 2kg international parcel can significantly move away from the minimum price in its own market, from 0% (meaning that the USP is the cheapest, as is the case of LU) to over 3 times higher as in Czech Republic. Criteria affecting prices are: parcel sizes allowed and the extent to which the weight can differ from 2kg (product segmentation), delays and the collection possibilities.

Thereby, a pertinent analysis of the averages is complicated as there is an important impact of outliers due to the small number of companies. One solution is to improve the sampling by enabling the filtering according to those three criteria that are not detailed, or not in a standardized way, in the sample.

Figure 13 – Prices of a 2kg international parcel (track-trace): USP and minimum price collected by the EC (in euros)



Source: European Commission

Notes: There is no data for Germany as Deutsche Post stated that it does not fall under Art. 5 and 6 Parcel Regulation.

4.1.8. Conclusions

In the last years there was a significant price increase for single-piece letters. For parcels, prices remain almost constant. International parcels are much more expensive in countries outside EU and in Southern EU countries. Eastern countries are much cheaper for parcels and domestic letters. The important rise in prices for domestic letters in the last 5 years has not taken place in Eastern Europe. We observe that generally the price difference between domestic and international is higher for parcels than for letters, the reason might be that domestic priority letters tend to have a higher premium due to the D+1 aspect,



diminishing thereby the difference with the international priority letter which on average is D+3. According to the data collected by the EC based on the cross-border regulation, the standard deviation for the 2 kg track and trace international parcel is higher within national markets than between European USP, due to some very high prices in the countries for high value-added products; the USP prices are much closer to the minimum prices than to the maximum prices. The current EC dataset does not allow for a more detailed product sampling, as a result price comparison is difficult.

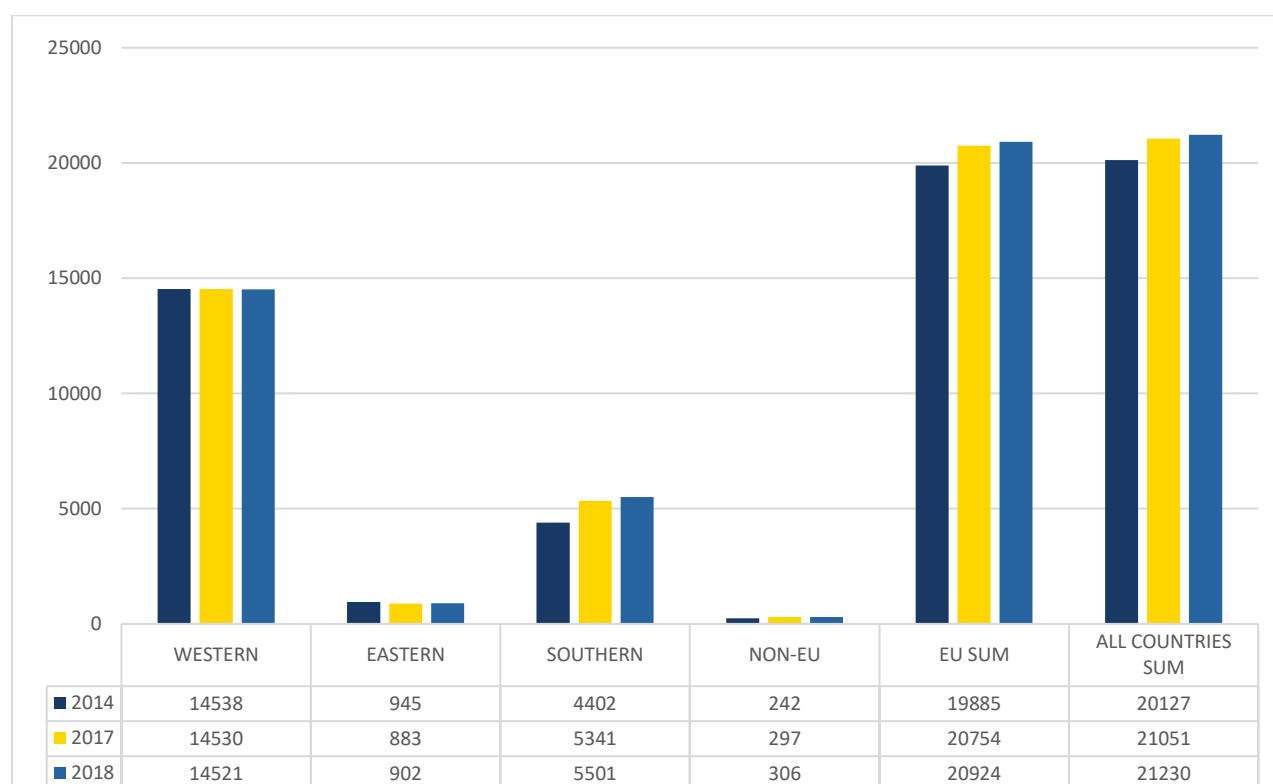
4.2. Market structure

In this section, quantitative data is presented with the objective of providing an overview of the structure of the postal market in Europe.

4.2.1. Number of active postal service providers

According to the available data, in the period 2014-2018 there has been a slight increase in the number of active number of postal service providers (PSP) at a European scale, as indicated in the figure below. In total, in the EU the number of PSP increased by 1103 providers as compared to 2014 (5.5%). The more significant increase derives from the Southern cluster of countries, which accounts for 1099 new active PSP in 2018, when compared to 2014 (25%).

Figure 14 – Active PSP per cluster 2014-2018

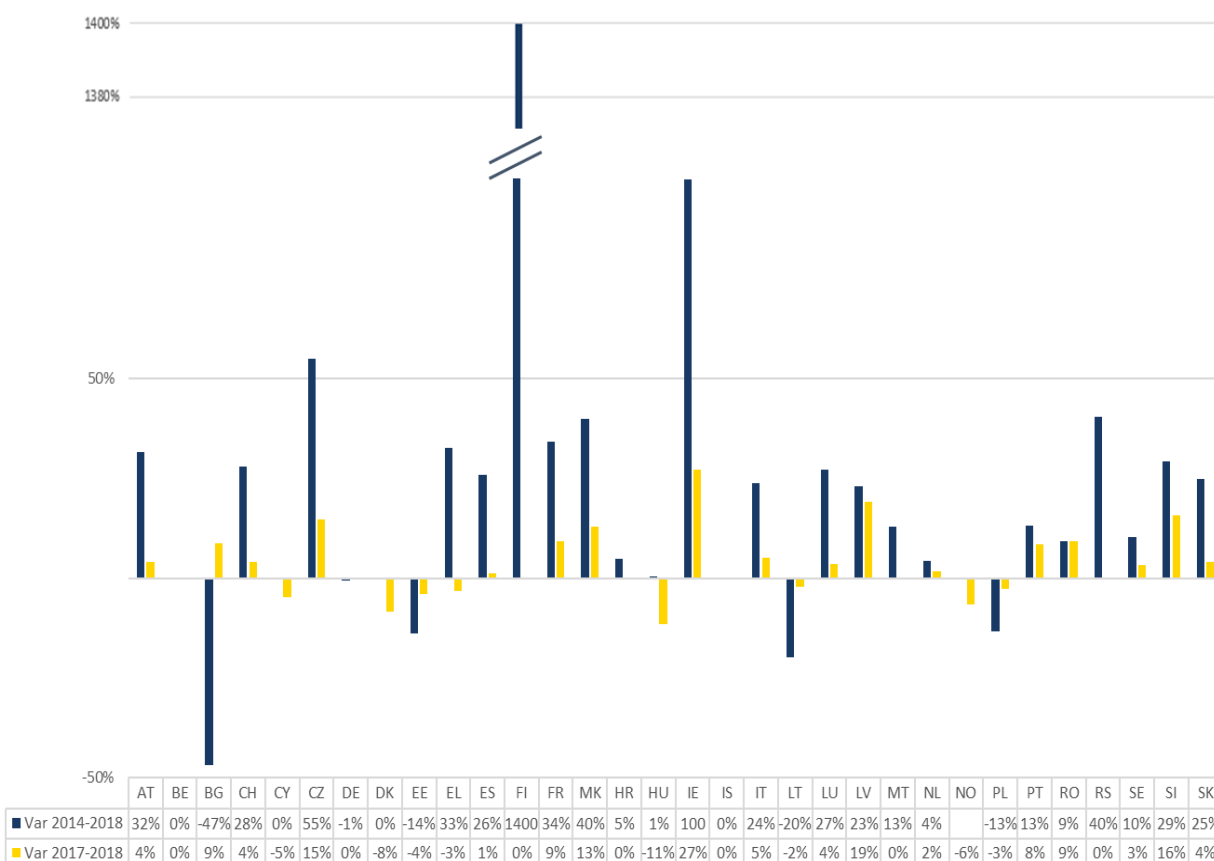


NOTES:

1. DE and IS provisional data for 2018. Contains some estimates according to section on methodology.
2. UK: postal operators are not required to be licensed and consequently there is no total list of postal operators.
3. BE estimate.
4. In PT and CZ subcontractors are not included.
5. SE: Only licensed operators included.

The highest absolute increase in terms of the number of active PSP in this period was registered in IT, with an increase of 587 active PSP (24%)¹⁹, followed by ES (+368%) and EL (+132%). Notwithstanding the overall trend of increase of number of active PSP, in three countries there has been no change in the number of active PSP from 2014 to 2018, and five countries witnessed a decrease in the number of PSP in 2018 when compared to 2014. The most relevant decrease in terms of percentage was observed in LT (representing 11 PSP, corresponding to -20%), while in terms of absolute values it was perceived in DE (70 PSP, corresponding to -1%). When looking more closely at the variation between 2017 and 2018 it is observable that the variations are not as significant, with only four countries showing an absolute variation greater than 10%: CZ, IE, LV and SI, all of which have witnessed an increase. The highest variation in terms of absolute values was registered in IT (increase of 152 active PSP in 2018, corresponding to 5%).

Figure 15 – Change in the number of active PSP between 2014 and 2018 (%)



NOTES:

1. Please refer to specific country notes on Figure 14.
2. Blank cells represent data not available.

¹⁹ The observed variation could be attributed to the increase in smaller postal operators and individual sub-contractors providing services at local level.

Figure 16 – Active postal service providers

COUNTRY	2014	2017	2018	Variation 2014-2018	
				Absolute Value	%
AT	19	24	25	6	32%
BE	700	700	700	0	0%
BG	139	68	74	-65	-47%
CH	140	172	179	39	28%
CY	20	21	20	0	0%
CZ	20	27	31	11	55%
DE	13600	13530	13530	-70	-1%
DK	11	12	11	0	0%
EE	29	26	25	-4	-14%
EL	404	554	536	132	33%
ES	1418	1765	1786	368	26%
FI	1	15	15	14	1400%
FR	35	43	47	12	34%
MK	25	31	35	10	40%
HR	21	22	22	1	5%
HU	178	202	179	1	5%
IE	7	11	14	7	100%
IS	4	4	4	0	0%
IT	2469	2904	3056	587	24%
LT	56	46	45	-11	-20%
LU	22	27	28	6	27%
LV	61	63	75	14	23%
MT	23	26	26	3	13%
NL	114	117	119	5	4%
NO	31	31	29	29*	0%*
PL	167	149	145	-22	-13%
PT	68	71	77	9	13%
RO	237	237	259	22	+9%
RS	42	59	59	17	40%
SE	29	31	32	3	10%
SI	17	19	22	5	29%
SK	20	24	25	5	25%
TOTAL	20127	21031	21230	1103	5.5%

NOTES:

1. DE, IS: Provisional data for 2018.
2. UK: postal operators are not required to be licensed and consequently there is no total list of postal operators.
3. BE estimate. NO: estimate in 2014.
4. FI: excluding parcel only operators.
5. SE: Only licensed providers.
6. PT, CZ subcontractors not included.
7. * variation 2017-2018.

4.2.2. Indicators on the level of market concentration

The Herfindahl-Hirschman index (HHI) analysis shows that the European postal market is highly concentrated, with an average HHI superior to 2000 both in terms of volumes and revenues, as illustrated in the figure below. It is also possible to note that, on average, the Eastern countries have a lower level of concentration than other countries, level that is decreasing since 2014 in terms of volumes but increasing in terms of revenues.

Figure 17 – Herfindahl-Hirschman Index (HHI) per cluster

CLUSTERS	HHI - Volumes					HHI - Revenues				
	2014	2017	2018	Variation 2014-2018 (%)	Variation 2017-2018 (%)	2014	2017	2018	Variation 2014-2018 (%)	Variation 2017-2018 (%)
WESTERN	7 955	7 366	7 295	-8%	-1%	7 523	6 565	6 457	-14%	-2%
EASTERN	6 188	5 678	5 613	-3%	-1%	3 905	3 306	3 444	-12%	4%
SOUTHERN	7 750	7 088	6 850	-12%	-3%	3 418	3 374	3 464	1%	3%
NON-EU	8 735	9 038	7 971	-9%	-12%	3 511	5 028	5 070	44%	1%
EU AVERAGE	7 298	6 844	6 719	-8%	-2%	4 949	4 415	4 455	-10%	1%
ALL COUNTRIES AVERAGE	7 657	7 392	7 032	-8%	-5%	4 589	4 568	4 609	0%	1%

NOTES:

Include the countries included on Figure 18 – Herfindahl-Hirschman Index (HHI) per country.

This concentration of the market is observable in almost all the countries that provided data, as shown in the figure below. The only countries with an HHI below 2000 for revenues, in 2018, are EL, LT and RO. Data shows that, in general, the level of concentration of the market is higher in terms of volumes (no country with HHI below 2000 in 2018) than revenues.

It can also be observed that for the majority of the countries, between 2014 and 2018, the HHI for volumes decreased or stabilized, being the exceptions HR and LT.

Even though in some countries the variation of the level of HHI is more significant when comparing the situation in 2014 to 2018, the variations regarding the situation in 2017 to 2018 are much less expressive. This could point to a certain stabilization of the market structure during 2017-2018. In fact, taking into account the evolution from 2017 to 2018, one country has an absolute variation in HHI greater than 10% in terms of volumes (MK), while two countries have a variation in HHI greater than 10% in terms of revenues (CZ and PT). Furthermore, it can be noted that RO is the country with the lowest market concentration in terms of volumes and revenues in 2018, while the highest concentration can be found in FR, both in terms of volumes and of revenues.

Figure 18 – Herfindahl-Hirschman Index (HHI) per country

COUNTRY	HHI - Volumes					HHI - Revenues				
	2014	2017	2018	Variation 2014- 2018 (%)	Variation 2017- 2018 (%)	2014	2017	2018	Variation 2014- 2018 (%)	Variation 2017- 2018 (%)

AT	7195	6 962	7 078	-2%	2%	6017	5 420	5 423	-10%	0%
BE	9011	8725	8708	-3%	0%	4506	4075	3866	-14%	-5%
BG	-	-	-	-	-	5230	4 559	5 544	6%	22%
CH	-	-	7263	-	-	-	-	6081	-	-
CZ	8964	7966	7827	-13%	-2%	7692	4541	5234	-32%	15%
DK	6400	6600	6200	-3%	-6%	-	-	-	-	-
EE	5244	4851	4741	-10%	-2%	3312	2474	2387	-28%	-4%
EL	6871	5042	4520	-34%	-10%	2465	1759	1772	-28%	1%
FR	9818	9797	9733	-1%	-1%	9657	9548	9503	-2%	0%
MK	8694	9376	8150	-6%	-13%	4257	6208	5486	29%	-12%
HR	5196	6857	7226	39%	5%	4796	4895	5110	7%	4%
HU	9156	8264	8383	-8%	1%	4380	3679	3324	-24%	-10%
IT	5699	5573	5583	-2%	0%	2224	2148	2111	-5%	-2%
LT	4075	5363	5293	30%	-1%	2189	1793	1789	-18%	0%
LV	6523	5939	5612	-14%	-6%	3194	2569	2569	-20%	0%
MT	9492	9200	9000	-5%	-2%	4549	4200	4000	-12%	-5%
NL	6098	5535	5687	-7%	3%	7307	6066	5784	-21%	-5%
PT	8939	8537	8298	-7%	-3%	4434	5390	5973	35%	11%
RO	3578	3542	3341	-7%	-6%	1226	1282	1254	2%	-2%
RS	8776	8700	8500	-3%	-2%	2764	3847	3644	32%	-5%
SE	7420	6 575	6 364	-14%	-3%	8559	7 715	7 707	-10%	0%
SK	6772	5838	5678	-16%	-3%	3125	3962	3786	21%	-4%
UK	9745	-	-	-	-	9093	-	-	-	-

NOTES:

NO: Since there are several undertakings that are still not registered with the NRA (and not reporting volumes/revenues to the NRA), NKOM does not find appropriate to provide measures of the level of market concentration.

The number of PSP with more than 1% of the total postal market reinforces the previous conclusion regarding the concentration of the postal market in Europe.

There is a correlation between the number of providers and the existence of providers with more than 1% of the market share, but that correlation is not so strong as expected and there are very diverse country cases at the European level. For example, some countries, even not having a very significant number of active providers, have a significant number of providers with more than 1% market share (the case of CY, with 20 providers and 10 with more than 1% market share). By other hand, there are countries with a high concentration of the market, even when the number of active providers is noteworthy, such as the case of Belgium (700 providers, 1 with more than 1% market share).

As can be observed in the following figure, even though there have been some changes in the number of operators with more than 1% of market share in the period 2014-2018, in the more recent period (2017-2018), in most of the countries who provided data there has been no change, both in terms of volumes and in revenues.

When looking specifically at data based on volumes for 2017 and 2018, BG, LT, RO and RS observed a percentage decrease, even though in terms of absolute number of operators this is not significant, while in EL there has been an increase. When analysing data based on revenues, it is possible to note that there have been increases in CZ, EL, PT and SK, while in BG, RO and RS there was a percentage decrease in the

number of operators with more than 1% market share. Notwithstanding, as before, in terms of absolute numbers, these variations per country do not seem to be significant.

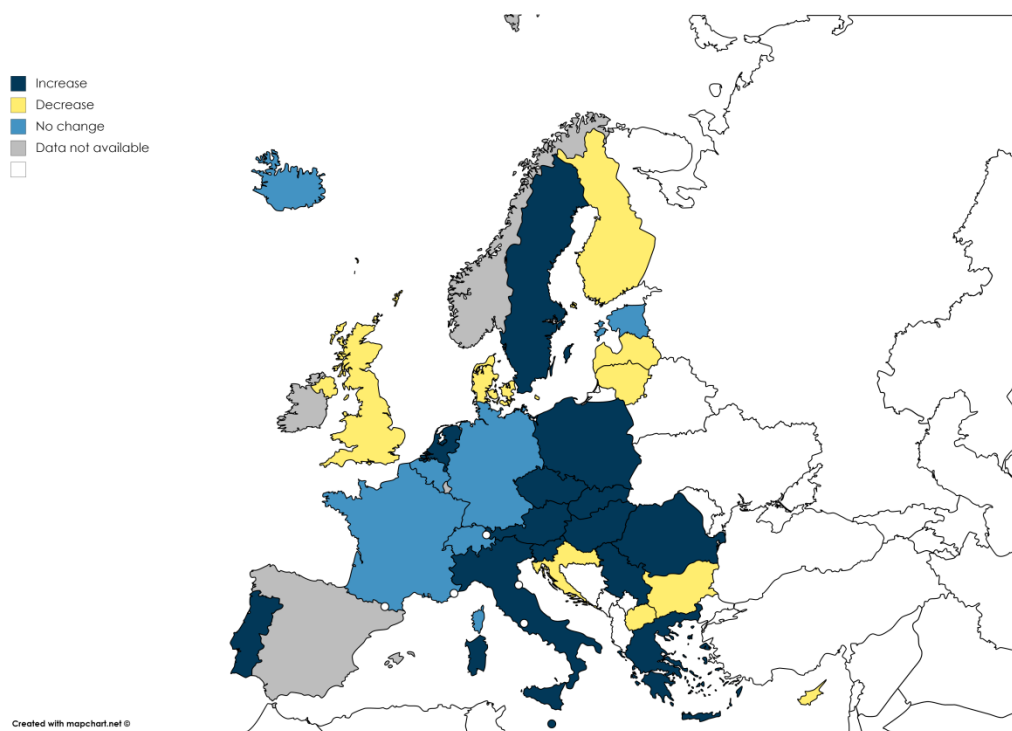
Figure 19 – Number of postal service providers with more than 1% of the postal market

COUNTRY	Based on volumes					Based on revenues				
	2014	2017	2018	Variation 2014-2018 (%)	Variation 2017-2018 (%)	2014	2017	2018	Variation 2014-2018 (%)	Variation 2017-2018 (%)
AT	2	3	3	50%	0%	7	8	8	14%	0%
BE	1	1	1	0%	0%	8	9	9	13%	0%
BG	16	10	7	-56%	-30%	16	16	13	-19%	-19%
CH	5	5	5	0%	0%	6	8	8	33%	0%
CY	16	10	10	-38%	0%	16	10	10	-38%	0%
CZ	4	5	5	25%	0%	4	5	6	50%	20%
DE	12	12	12	0%	0%	12	12	12	0%	0%
DK	6	5	5	-17%	0%	-	-	-	-	-
EE	4	4	4	0%	0%	10	12	12	20%	0%
EL	6	6	7	17%	17%	9	9	10	11%	11%
ES	2	2	n.a.	0%*	0%*	2	2	n.a.	0%*	0%*
FR	1	1	1	0%	0%	1	1	1	0%	0%
MK	4	3	3	-25%	0%	8	3	3	-63%	0%
HR	5	4	4	-20%	0%	8	8	8	0%	0%
HU	2	3	3	50%	0%	10	9	9	-10%	0%
IS	4	4	4	0%	0%	4	4	4	0%	0%
IT	7	8	8	14%	0%	9	9	9	0%	0%
LT	8	8	7	-13%	-13%	12	11	11	-8%	0%
LV	17	7	7	-59%	0%	11	8	8	-27%	0%
MT	1	2	2	100%	0%	7	8	8	14%	0%
NL	2	4	4	100%	0%	2	4	4	100%	0%
PL	7	8	8	14%	0%	13	11	11	-15%	0%
PT	2	4	4	100%	0%	10	8	9	-10%	13%
RO	7	9	8	14%	-11%	15	13	11	-27%	-15%
RS	4	8	5	25%	-38%	7	9	6	-14%	-33%
SE	2	3	3	50%	0%	2	2	2	0%	0%
SI	2	7	7	250%	0%	11	10	10	-9%	0%
SK	6	8	8	33%	0%	10	10	11	10%	10%
UK	2	1	1	-50%	0%	1	1	1	0%	0%
TOTAL	158	161	154	-3%	-4%	231	230	226	-2%	-2%

NOTES:

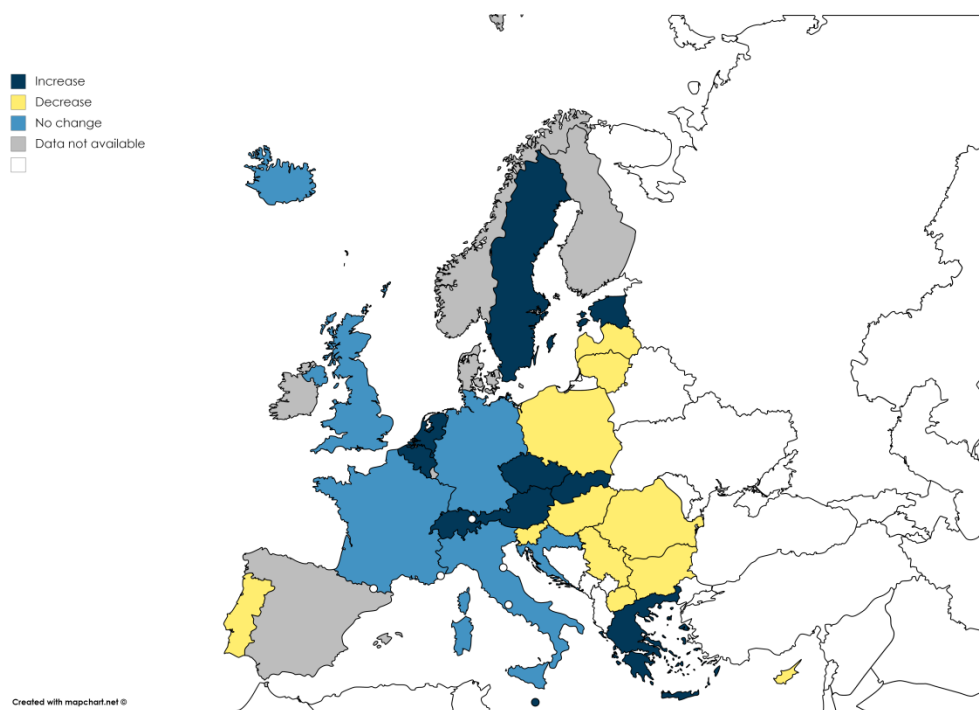
1. IS, SI: Provisional data in 2018.
2. UK figure refers to end-to-end letters
3. NO: Since there are several undertakings that are still not registered with the NRA (and not reporting volumes/revenues to the NRA), NKOM does not find appropriate to provide measures of the level of market concentration.
4. * var. 2014-2017.

Figure 20 – Number of PSP with more than 1% of the postal market (based on volumes), var. 2014-2018

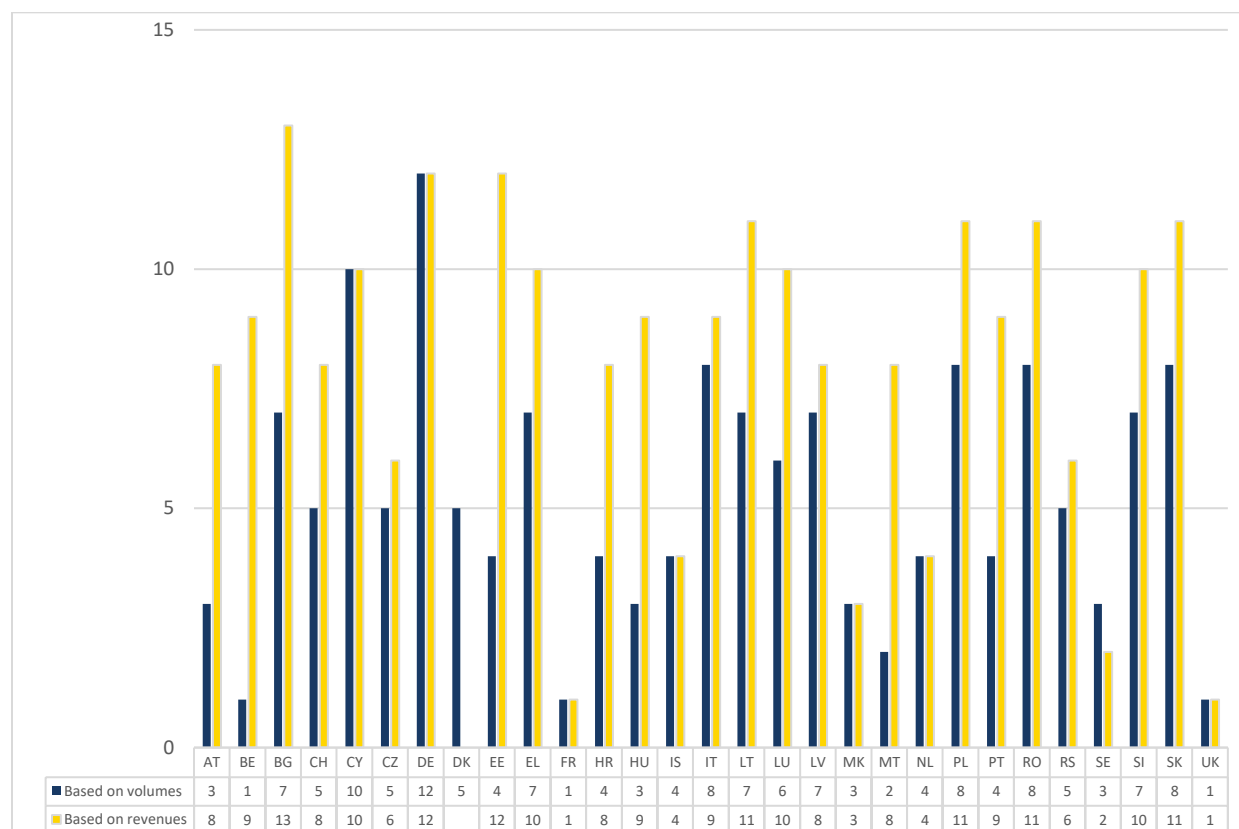


NOTES: Please refer to notes of Figure 19.

Figure 21 – Number of PSP with more than 1% of the postal market (based on revenues), var. 2014-2018



NOTES: Please refer to notes of Figure 19.

Figure 22 – Number of postal service providers with more than 1% of the postal market in 2018**NOTES:**

Please refer to specific country notes on Figure 19 – Number of postal service providers with more than 1% of the postal market.

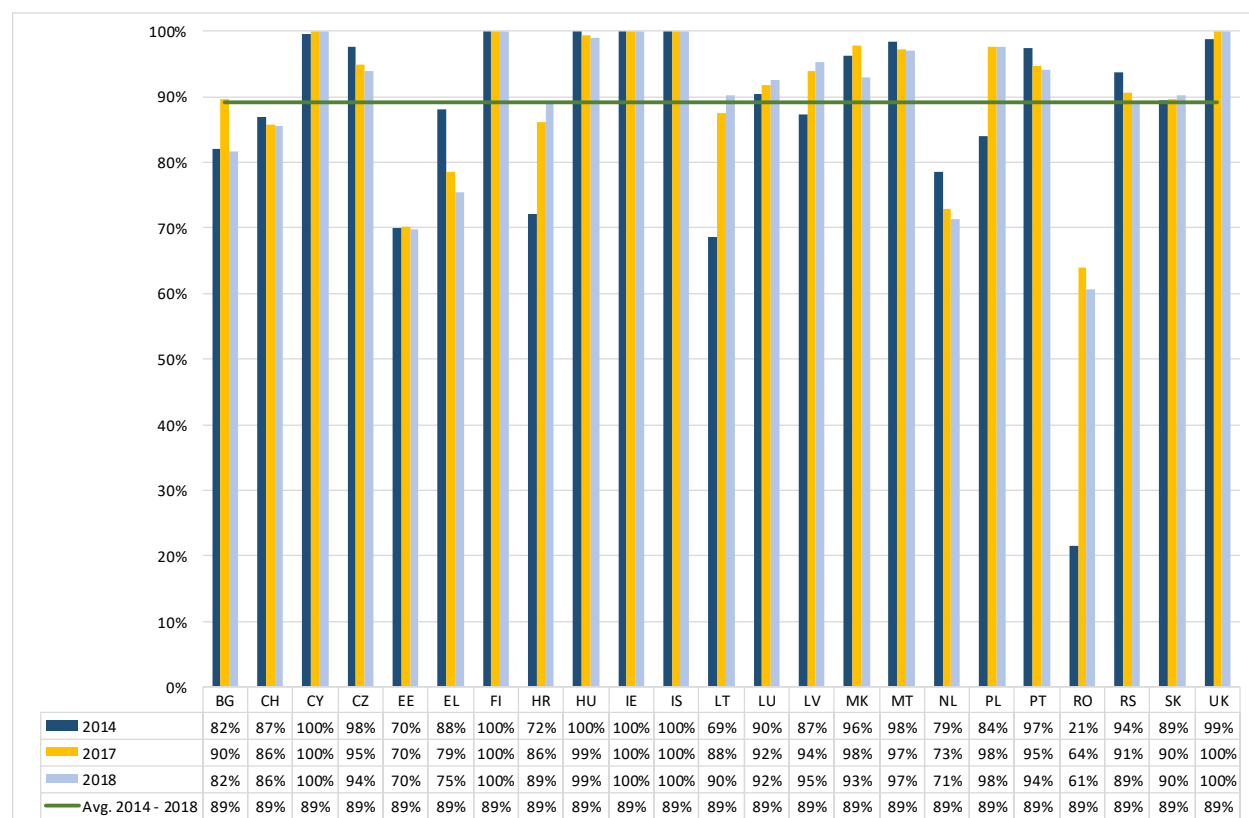
4.2.3. USP Market Shares

The following section presents the USPs' volumes and revenue market shares.

4.2.3.1. USP Volume Market Shares

In the ERGP Member States for which information is available, the USP maintains a high market share for letter volume, on average a share²⁰ of 89% for 2018. Compared to 2014, the USP letter volume share remained constant.

²⁰ Excluding AT, DK, ES, FR, SE and NO, as the data is confidential and was not provided.

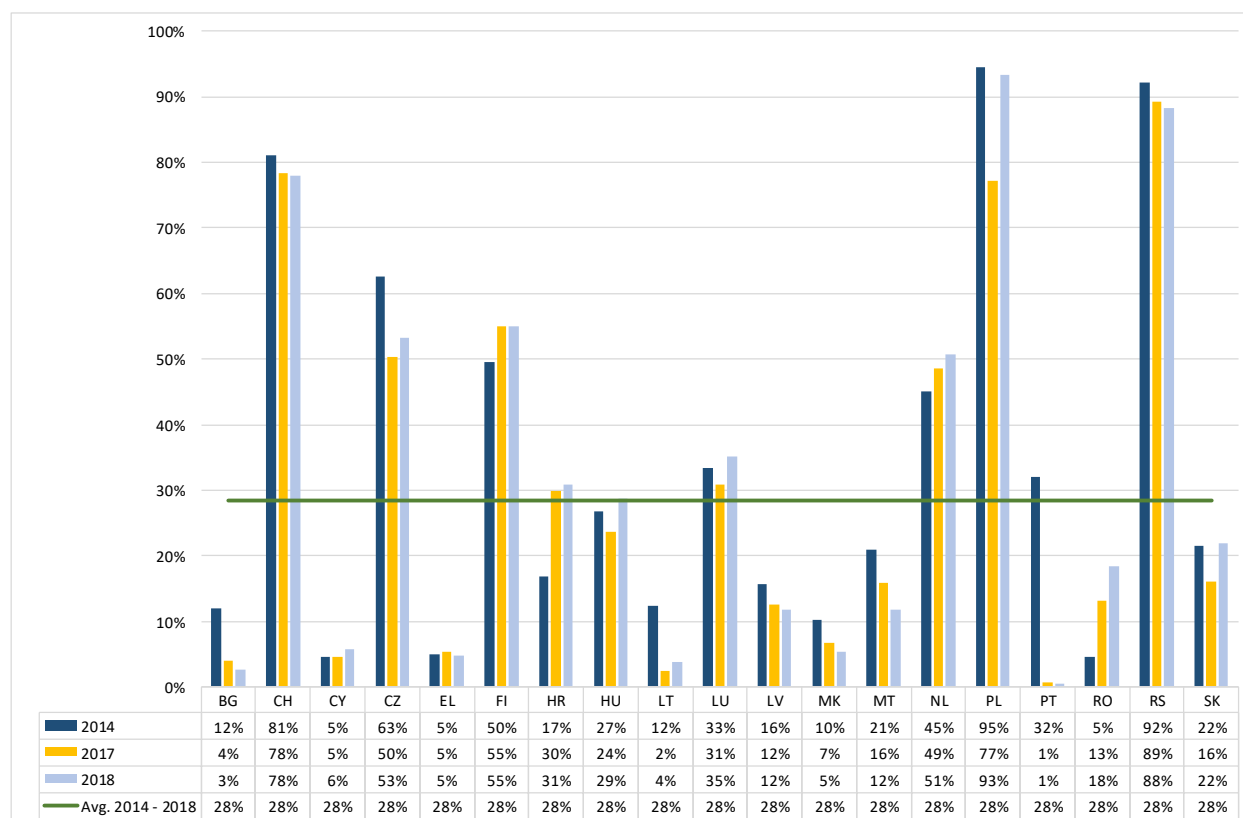
Figure 23 – USP Volume share for letters


Notes:

1. The average 2014 – 2018 includes all countries except the following: a) AT, DK, ES, FR, NO, SE and SI, since data is not provided due to either being confidential or not available. b) USO data only: CY, FI, IE, IS, RS.
2. Confidential data: BE, EE, ES, IT, NO, SI.
3. Data only provided for “Handled by all operators”: AT, ES, DK, FR.
4. ERGP, Estimates for: a) 2018: DE, FI, IS; b) 2017: FI, IS; c) 2014 and 2016: DE.
5. IE: Express is not a postal service.
6. RS: Letter post includes postal money order, which is in scope of US.
7. UK: Figure includes access volumes delivered by the USP.

The USPs have lower markets shares regarding the parcels, which, on average²¹ is around 28%, which remained constant when compared to 2014.

²¹ Excluding AT, DK, ES, FR, NO, SE and UK, as the data is confidential and was not provided.

Figure 24 – USP Volume share for parcels


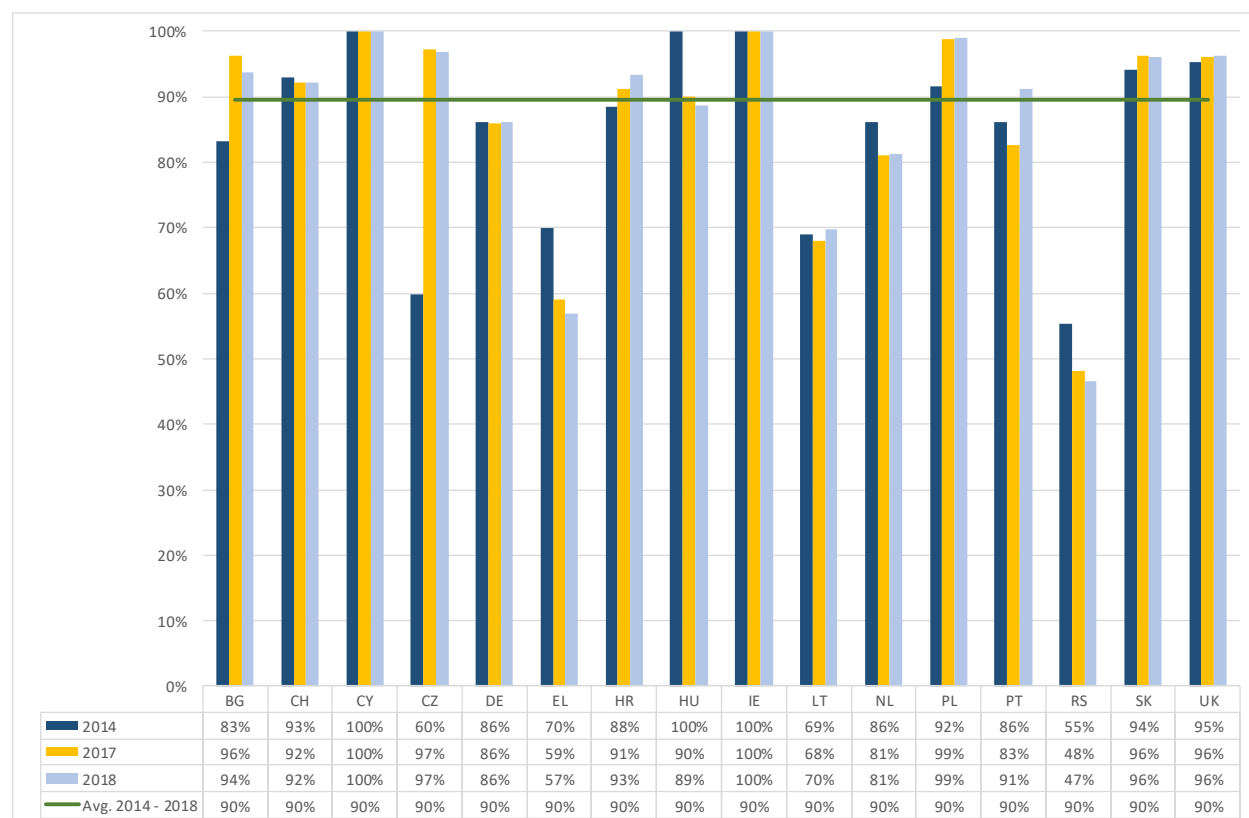
Notes:

1. The average 2014 – 2018 includes all countries except the following: a) AT, DK, ES, FR, NO, SE and UK, since data is not provided due to either being confidential or not available; b) USO data only: IE, IS, RS.
2. Confidential: BE, DE, EE, ES, IT, NO, SE, SI.
3. Data only provided for “Handled by all operators”: AT, ES, DK, FR.
4. ERGP Estimates for: a) 2018: DE, FI, IS; b) 2017: FI, IS; c) 2016 2014: DE.
5. IE: Express is not a postal service.
6. UK: Figure includes access volumes delivered by the USP..

4.2.3.2. USP Revenues Market Shares

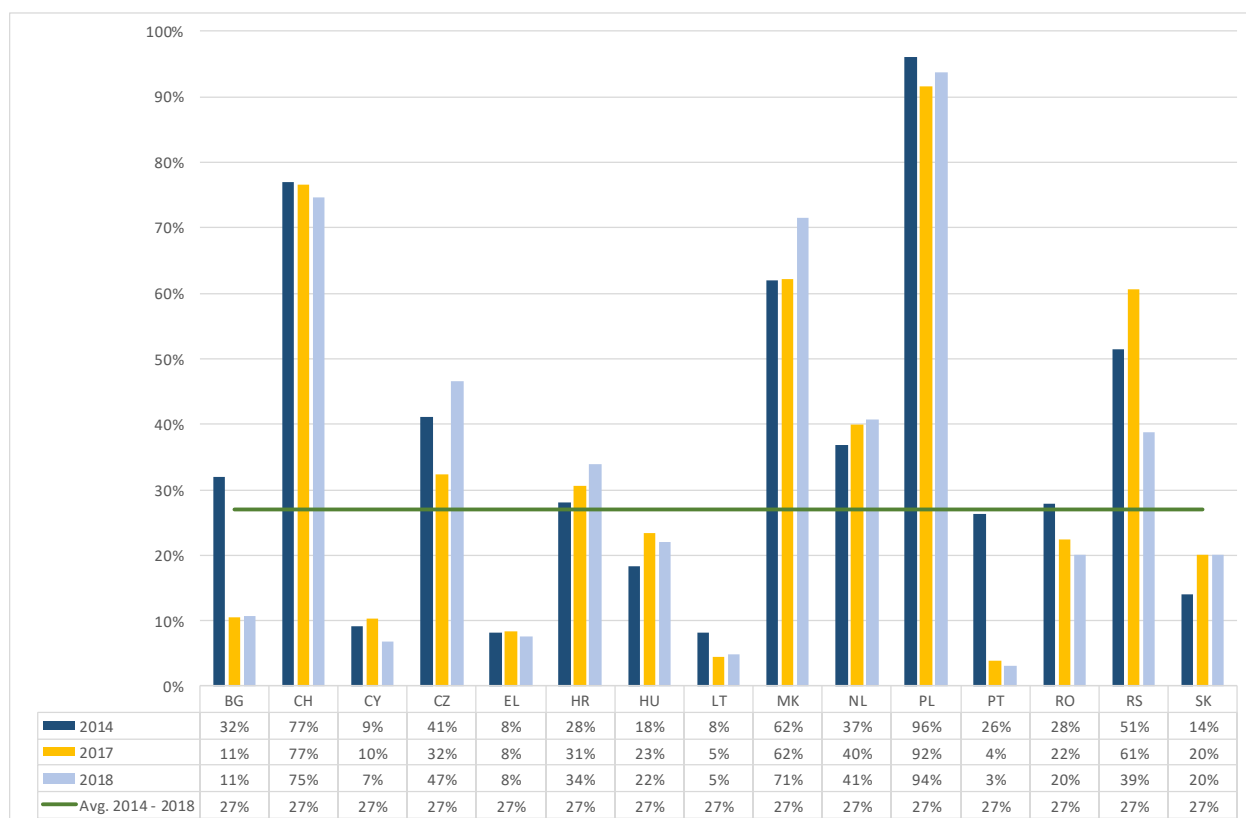
The USPs’ share of letter revenues for 2018, was around 90%²², which is the same as that of 2014. The USP has gained share in Croatia, Lithuania, Malta, Portugal and Republic of North Macedonia and Portugal.

²² Excluding AT, DK, ES, FR, NO and SE, as the data is confidential and was not provided.

Figure 25 – USP Revenue Market Shares for Letters**Notes:**

1. The average 2014 – 2018 includes all countries except the following: a) AT, DK, ES, FR, NO, and SE, since data is not provided due to either being confidential or not available; b) USO data only: CY, FI, IE, IS, RS.
2. Confidential: BE, AT, EE, ES, FI, IS, IT, LU, LV, MT, NO, SI.
3. Data only provided for “Handled by all operators”: AT, ES, DK, FR.
4. ERGP Estimates for: a) 2018: DE, IE, IS, LV; 2017: IE, IS; 2016 and 2015: DE, SI; 2014: DE, HR, SI.
5. IE: Express is not a postal service.
6. RS: Letter post includes postal money order, which is in scope of US.

In the countries for which data is available, the USP share of parcel revenues is far more variable than for letters. The average of the USP revenue market share in 2018 was 27%, remaining constant when compared with 2014. In Malta, the USP has lost 59% percentage points of its share of parcel revenues between 2014 and 2018.

Figure 26 – USP Revenue Market Shares for Parcels

Notes:

1. The average 2014 – 2018 includes all countries except the following: a) AT, DK, ES, FR, NO, SE and UK, since data is not provided due to either being confidential or not available; b) USO data only: IE, IS, FI, RS.
2. Confidential: BE, DE, EE, ES, FI, IS, IT, LU, LV, MT, NO, SI, UK.
3. Data only provided for “Handled by all operators”: AT, ES, FR.
4. ERGP Estimates for: a) 2018: IS, LV; b) 2017: IS; c) 2016 - 2014: SI; d) 2015: CH, ES, LU, LV, RO, SI, MK, UK; e) 2014: BG, CH, ES, HR, LU, LV, MK, RO, SI.
5. IE: Express is not a postal service.

4.3. Volumes

4.3.1. Volume Trends

Over the past years, total traffic volumes across ERGP countries have been declining, and since 2014 there was an average decrease of 3% (more than ten (10) billion items). This decline is due to letter mail volumes, which dropped, on average by, 5% (around thirteen (13) billion items). In contrast, parcels increased, approximately by, 7% (nearly two (2) billion items).

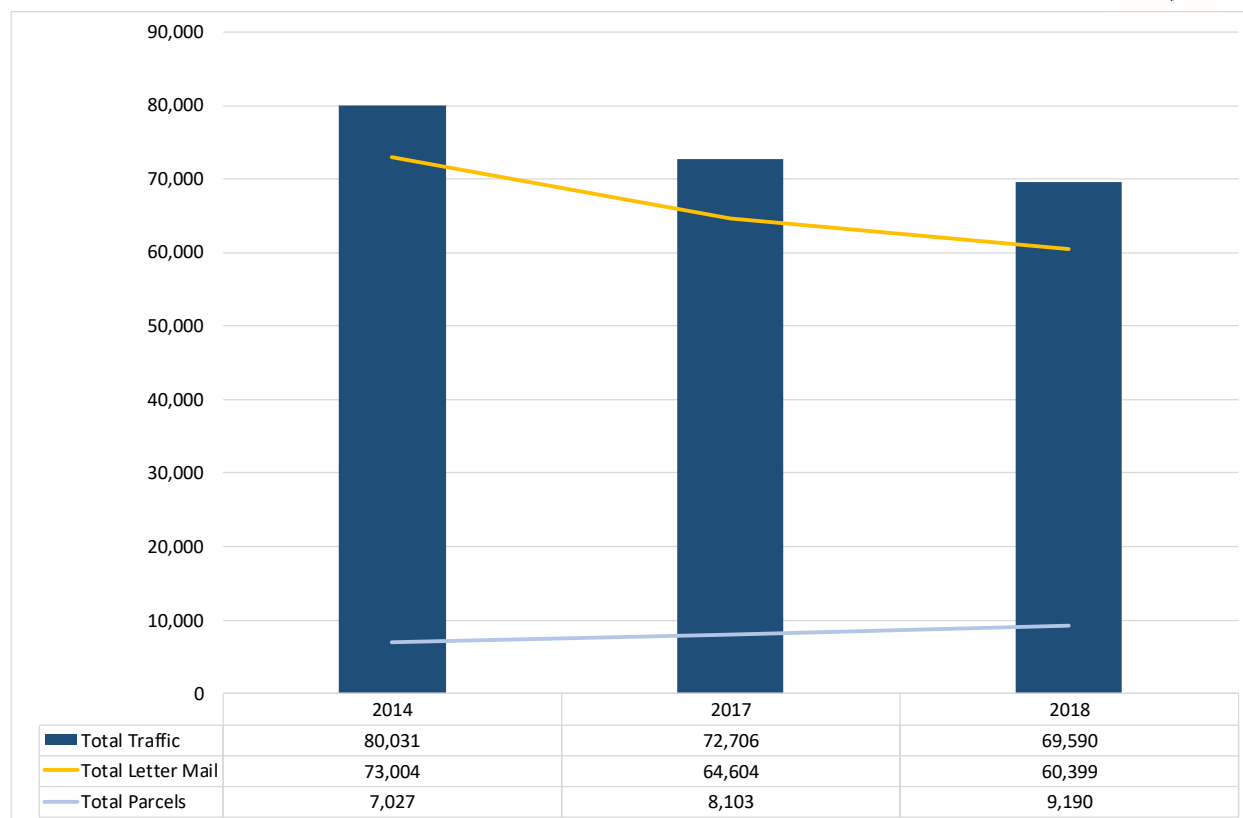
Figure 27: Total Postal Volumes and the percentage change 2017-2018 and 2014-2018

	2014 (in millions)	2017 (in millions)	2018 (in millions)	Percentage change 2017 - 2018	Annual Percentage change 2014 - 2018
Total Traffic	80,031	72,706	69,590	-4%	-3%
Total Letter Mail	73,004	64,604	60,399	-7%	-5%
Total Parcels	7,027	8,103	9,190	13%	7%

Notes:

1. Includes all countries except DK, NO and SE.
 - a. To be able to compare the data for revenues and volumes, DK was excluded since revenue was not provided.
 - b. NO and SE, data is not provided due to confidentiality.
2. Letters:
 - a. Confidential: BE, EE, NO, SI.
 - b. USO data only: CY, FI, IE, IS, RS.
 - c. ERGP Estimates for 2016 - 2014: DE.
3. Parcels:
 - a. Confidential: BE, DE, EE, NO, SE, SI.
 - b. USO data only: IE, IS, RS.
 - c. ERGP Estimates for: i) 2016 - 2014: DE; ii) 2014 - 2015: UK.
4. IE: Express is not a postal service.
5. RS: Letter post includes postal money order, which is in scope of US.
6. FR: a) Express is excluded and covers only items provided by postal operators which have an individual licence for correspondence, granted by the NRA. b) Break in data series: Before 2017, international inbound volumes were included in domestic items (the segmentation between domestic and inbound items was not available). Since 2017, ARCEP collect data about inbound traffic, which are no longer included in domestic items. This leads to a break in the data series for domestic items (both for letters and parcels).
7. In 2017, a change was introduced in the methodology (change of scope) leading to a break in the data series: the small international packages (inbound and outbound), which were previously counted in the category of letter post, are now included in the parcels.
8. PL: For USP, the total traffic includes also the following: courier items, postal items sent by means of electronic communications, postal money orders and items for the blind, which are not indicated. For alternative operator, the total traffic includes courier items, which are not indicated. This applies to 2017 and 2018. For the above table, it was decided to take into consideration the summation of the total letter and total parcels instead of the total traffic.
9. RO: Express in the total traffic but not in the total letter mail and total parcels.
10. MK: Total traffic includes, total letter post, parcels, printed matters and direct mail.
11. RS: Total traffic of USP includes express services. Alternative postal providers provide only express services. Letter post and parcels provides only USP

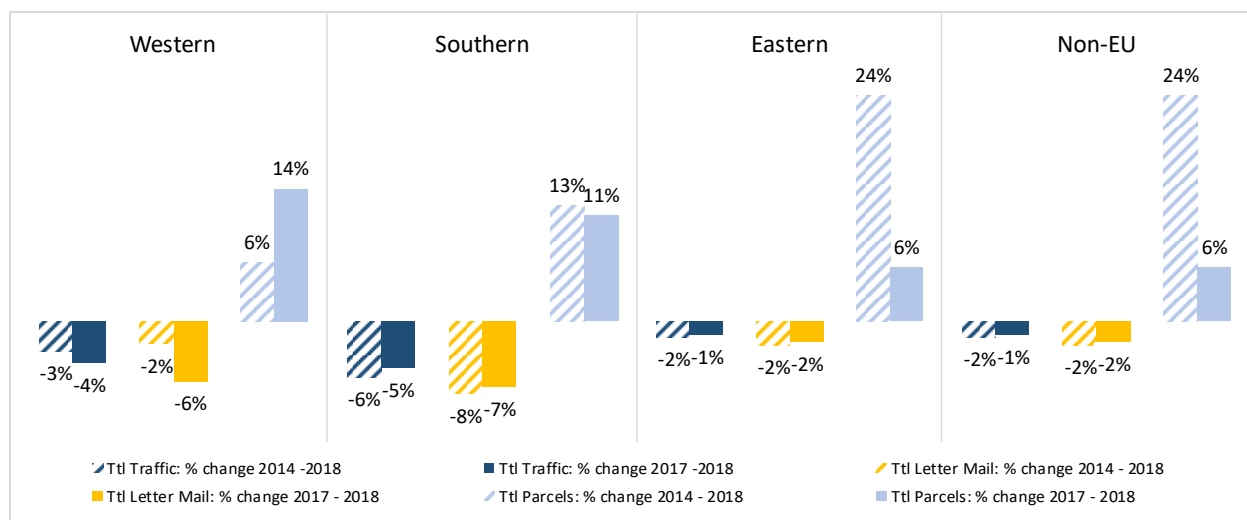
Figure 28: Total Postal Volumes and the percentage change 2017-2018 and 2014-2018



NOTES: Please refer to specific country notes on Figure 27.

Total traffic decreased in all clusters, as well as letters volumes. Parcel volumes increased in all regions, with a particular significant increase in the Southern region.

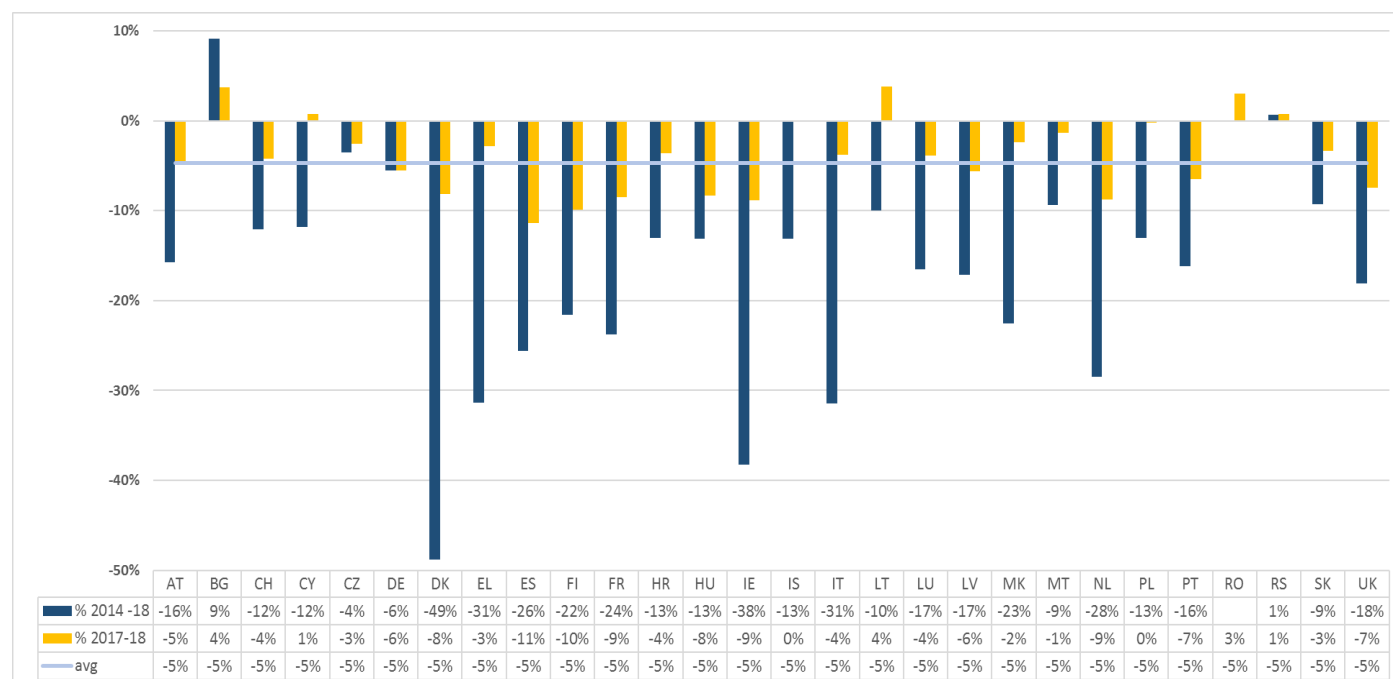
Figure 29: Total Volumes – percentage change 2014-2018 and 2017-2018



As pointed out, letter mail volumes continue to register a drop in the majority of the countries, apart from Bulgaria, Cyprus, Germany, Iceland, Lithuania, Poland, Romania and Serbia. On the other hand, Spain

registered the highest drop in the last two years, with a decrease of 11% from 2017.

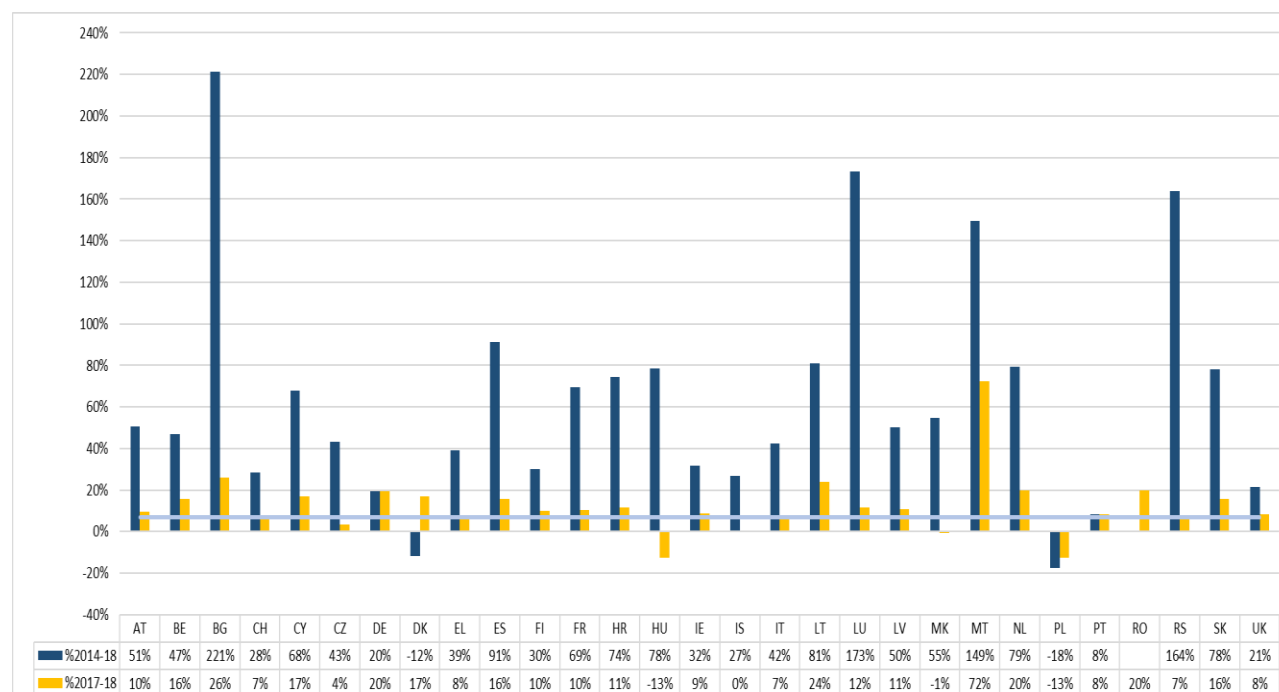
Figure 30: Total Letter Volumes – percentage average annual change



Notes:

1. The average 2014 – 2018 includes all countries except NO and SE, since not provided due to confidentiality.
2. Letters: a) Confidential: BE, EE, NO, SI. b) USO data only: CY, FI, IE, IS, RS.
3. IE: Express is not a postal service.
4. RS: Letter post includes postal money order, which is in scope of US.
5. FR: a) Express is excluded and covers only items provided by postal operators, which have an individual licence for correspondence, granted by the NRA. b) Break in data series: Before 2017, international inbound volumes were included in domestic items (the segmentation between domestic and inbound items was not available). Since 2017, ARCEP collect data about inbound traffic, which are no longer included in domestic items. This leads to a break in the data series for domestic items (both for letters and for parcels). c) In 2017, a change was introduced in the methodology (change of scope) leading to a break in the data series: the small international packages (inbound and outbound), which were previously counted in the category of letter post, are now included in the parcels.

As stated, the parcel market is flourishing with a growth of 7% between 2017 and 2018. This growth happens in all countries except for Hungary and Poland, which registered a decrease of 13% when compared to 2017.

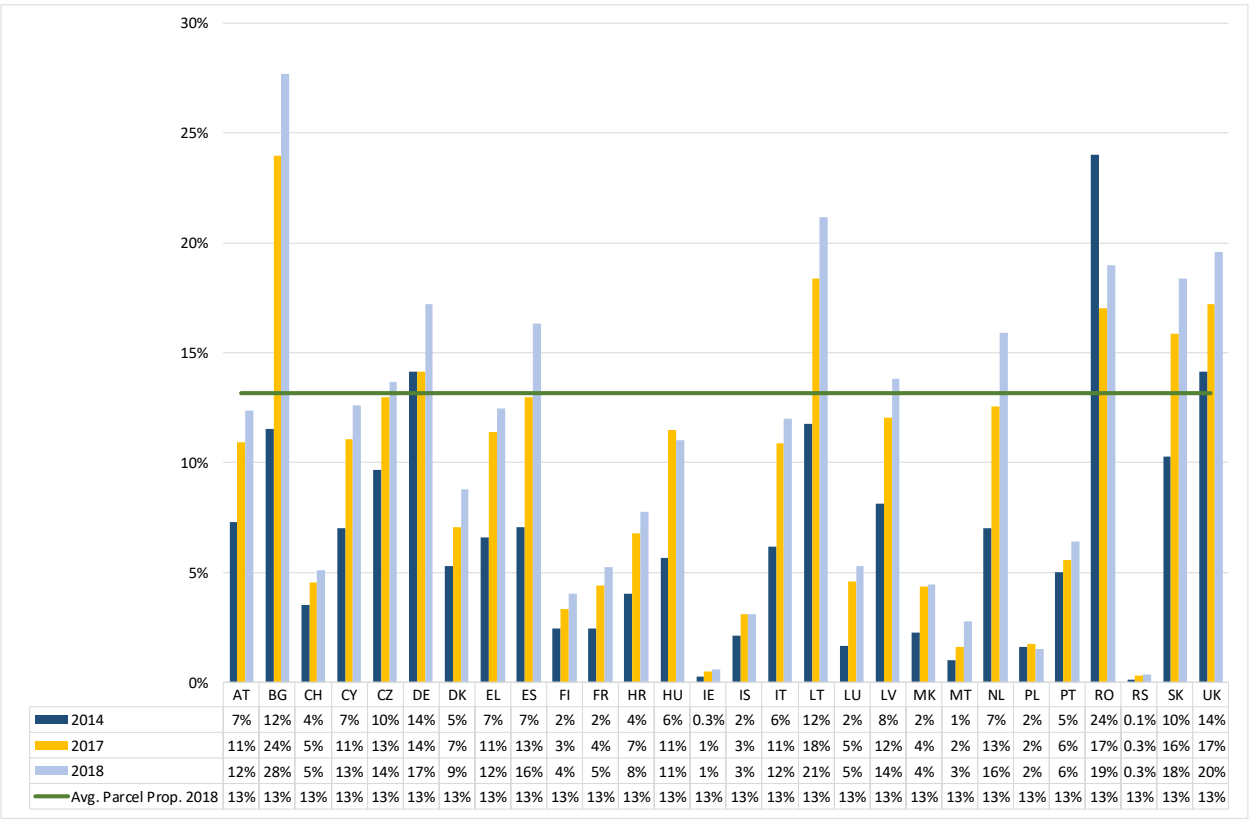
Figure 31: Total Parcel Volumes – percentage average annual change

Notes:

1. The average 2014 – 2018 includes all countries except NO and SE, since not provided due to confidentiality.
2. Parcels: a) Confidential: BE, DE, EE, NO, SE, SI; b) USO data only: IE, IS, RS; c) ERGP Estimates for: i) 2016: DE; ii) 2014 - 2015: DE, UK.
3. IE: Express is not a postal service.
4. FR: a) Express is excluded and covers only items provided by postal operators, which have an individual license for correspondence, granted by the NRA. b) Break in data series: Before 2017, international inbound volumes were included in domestic items (the segmentation between domestic and inbound items was not available). Since 2017, ARCEP collect data about inbound traffic, which are no longer included in domestic items. This leads to a break in the data series for domestic items (both for letters and for parcels). c) In 2017, a change was introduced in the methodology (change of scope) leading to a break in the data series: the small international packages (inbound and outbound), which were previously counted in the category of letter post, are now included in the parcels.

4.3.2. The proportion of postal item volumes

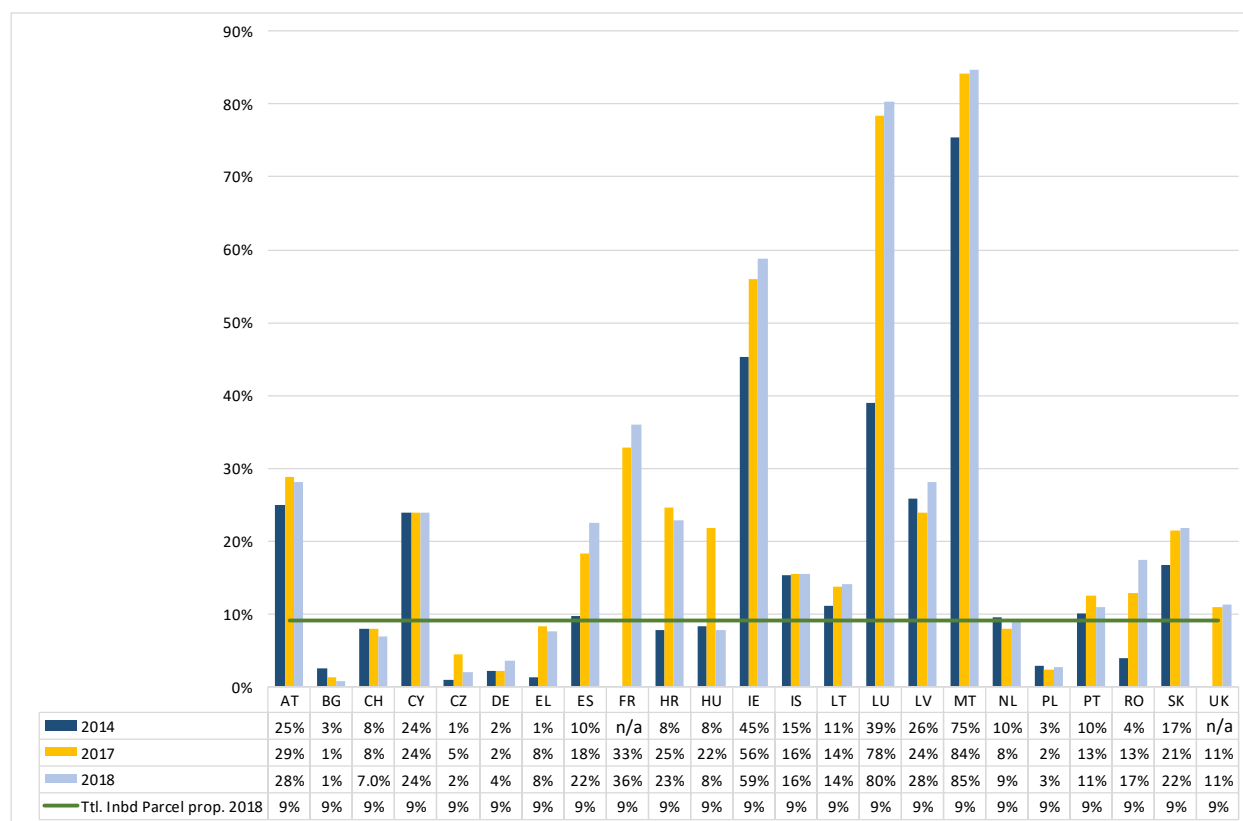
Given, that letter mail volumes are declining, and parcel volumes are increasing, it comes to no surprise that the proportion of total traffic volume accounted for by parcels increases. In 2014, the average proportion of parcels was 9% and incremented to 13% in 2018.

Figure 32: Proportion of Parcels in Total Traffic



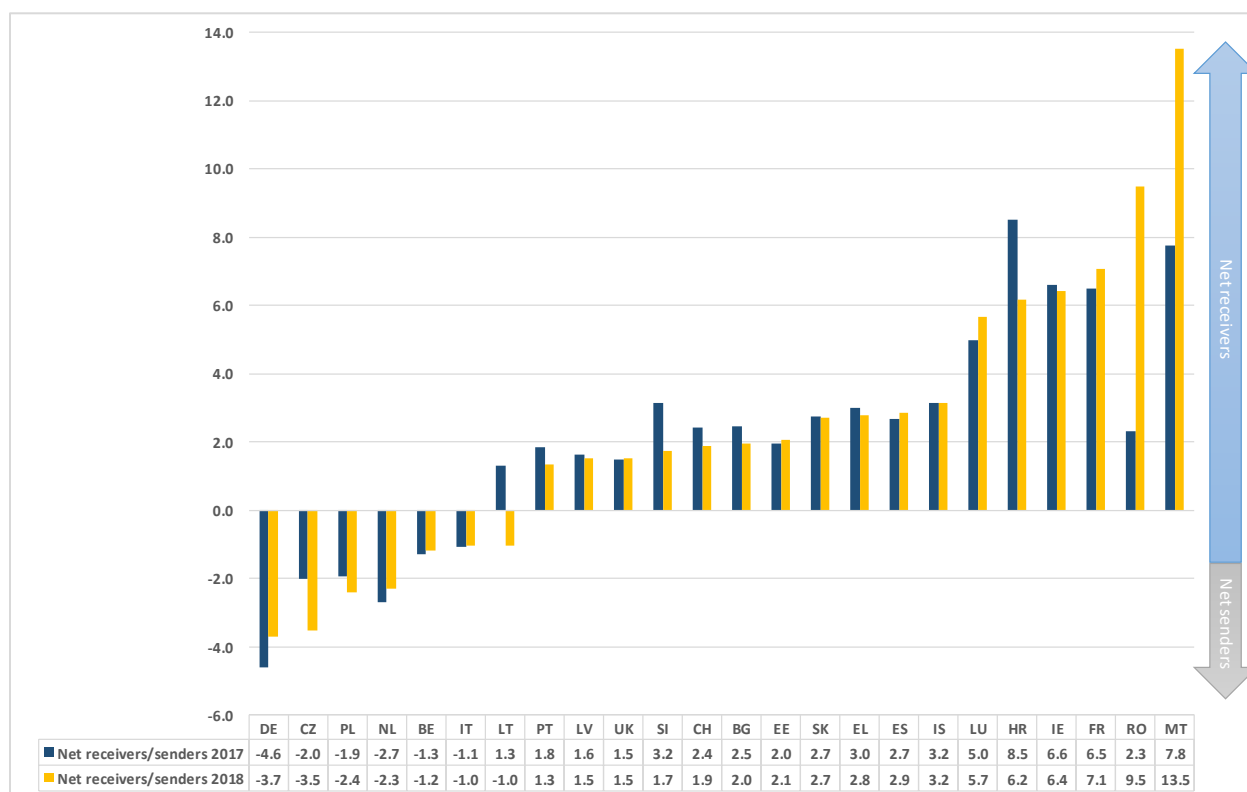
NOTES: Please refer to specific country notes on Figure 27.

The chart below shows the proportion of inbound parcels within the total parcel volume for each of the countries that were able to provide such data split. Malta (85%) and Luxembourg (80%) have the highest proportion of inbound parcels. This is mainly attributed to the ongoing growth of e-Commerce and parcel market dynamics. Grouping all the countries together, the share of inbound parcels in 2018 was 9%, which grew when compared to 2014 (6%).

Figure 33: Proportion of Inbound Parcels from Total Parcels

Notes:

- The average 2014 – 2018 includes all countries except DK, FI, FR, MK, NO, RS, SE, SI and UK, since not provided due to confidentiality or non-availability.
- Parcels:
 - Confidential: BE, EE, NO, SE, SI.
 - USO data only: IE, IS, RS.
 - ERGP Estimates for Total Parcels
 - 2016: DE.
 - 2014: DE, UK.
 - Estimates for Inbound Parcels: i) 2017: CY; ii) 2014: BE, CY, DE.
- IE: Express is not a postal service.
- FR: a) Express is excluded and covers only items provided by postal operators, which have an individual license for correspondence, granted by the NRA. b) Break in data series: Before 2017, international inbound volumes were included in domestic items (the segmentation between domestic and inbound items was not available). Since 2017, ARCEP collect data about inbound traffic, which are no longer included in domestic items. This leads to a break in the data series for domestic items (both for letters and for parcels). c) In 2017, a change was introduced in the methodology (change of scope) leading to a break in the data series: the small international packages (inbound and outbound), which were previously counted in the category of letter post, are now included in the parcels.

Given the country-specific distribution, it is very interesting to understand which countries tend to receive more parcels (“net receivers”) than to send (“net senders”) and The figure below depicts this comparison.

Figure 34: Ratio between receivers and senders**Notes:**

1. *Parcels:*
 - a. Confidential: BE, EE, NO, SE, SI.
 - b. USO data only: IE, IS, RS.
2. ERGP Estimates for Inbound and Outbound Parcels: i) 2017: CY;
3. IE: Express is not a postal service.
4. FR: a) Express is excluded and covers only items provided by postal operators, which have an individual license for correspondence, granted by the NRA. b) Break in data series: Before 2017, international inbound volumes were included in domestic items (the segmentation between domestic and inbound items was not available). Since 2017, ARCEP collect data about inbound traffic, which are no longer included in domestic items. This leads to a break in the data series for domestic items (both for letters and for parcels). c) In 2017, a change was introduced in the methodology (change of scope) leading to a break in the data series: the small international packages (inbound and outbound), which were previously counted in the category of letter post, are now included in the parcels.

4.3.3. Volumes per capita

Another aspect that is analysed is the volume per capita, which provides an insight into how much letters each person sends. Given the drop in volumes across all countries, when compared with 2014 there was an average decrease of 4% (approximately 22 items per capita). This drop is mainly due to letter mail volumes, which fell, on average by, 5% (around 26 letter mail per capita) while parcels increased, on average by, 7% (nearly three (4) parcels per capita).

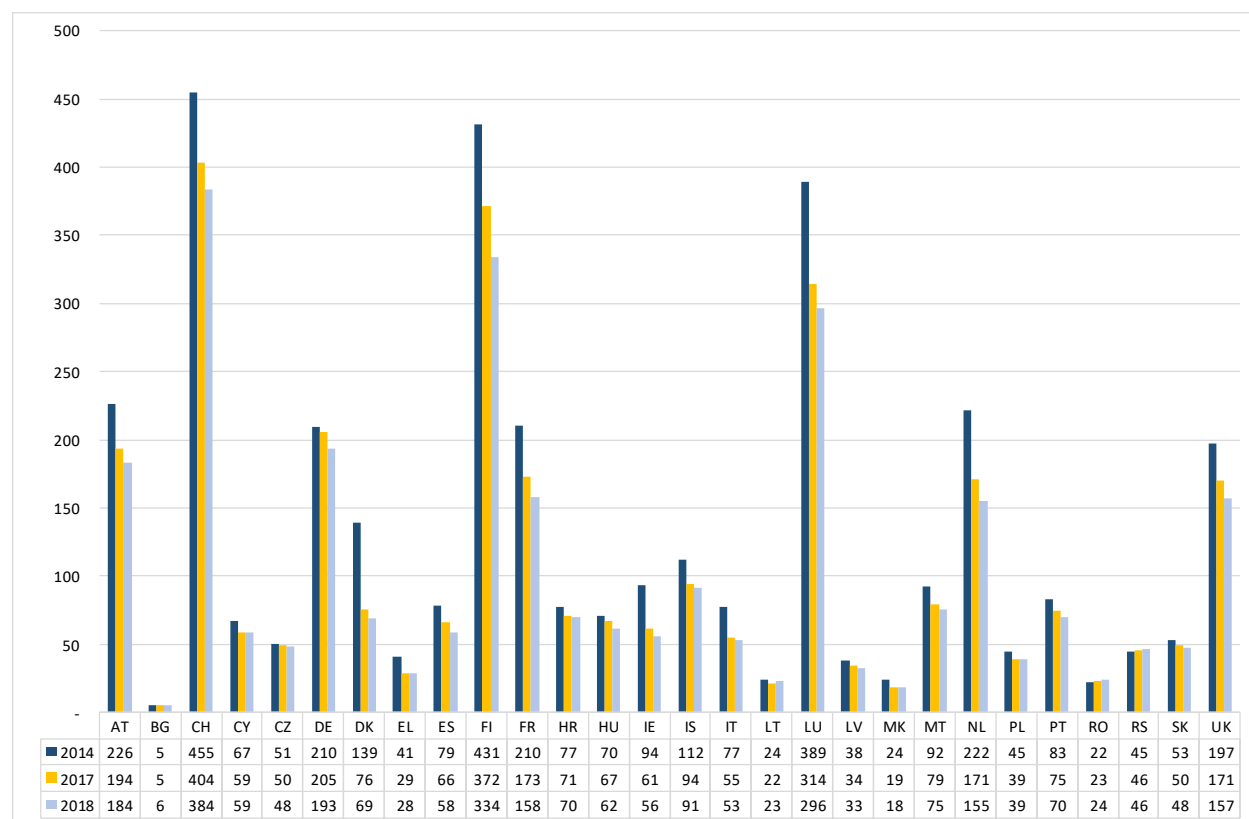
Figure 35: Total Postal Volumes per capita and the percentage change between 2017 and 2018

	2014	2017	2018	Percentage change 2017 - 2018	Annual percentage change 2014-2018
Total Traffic	157	142	135	-4%	-4%
Total Letter Mail	143	126	117	-7%	-5%
Total Parcels	14	16	18	+13%	+7%

Notes: Please refer to notes on Figure 29.

Population source: Eurostat as at 06/06/2019

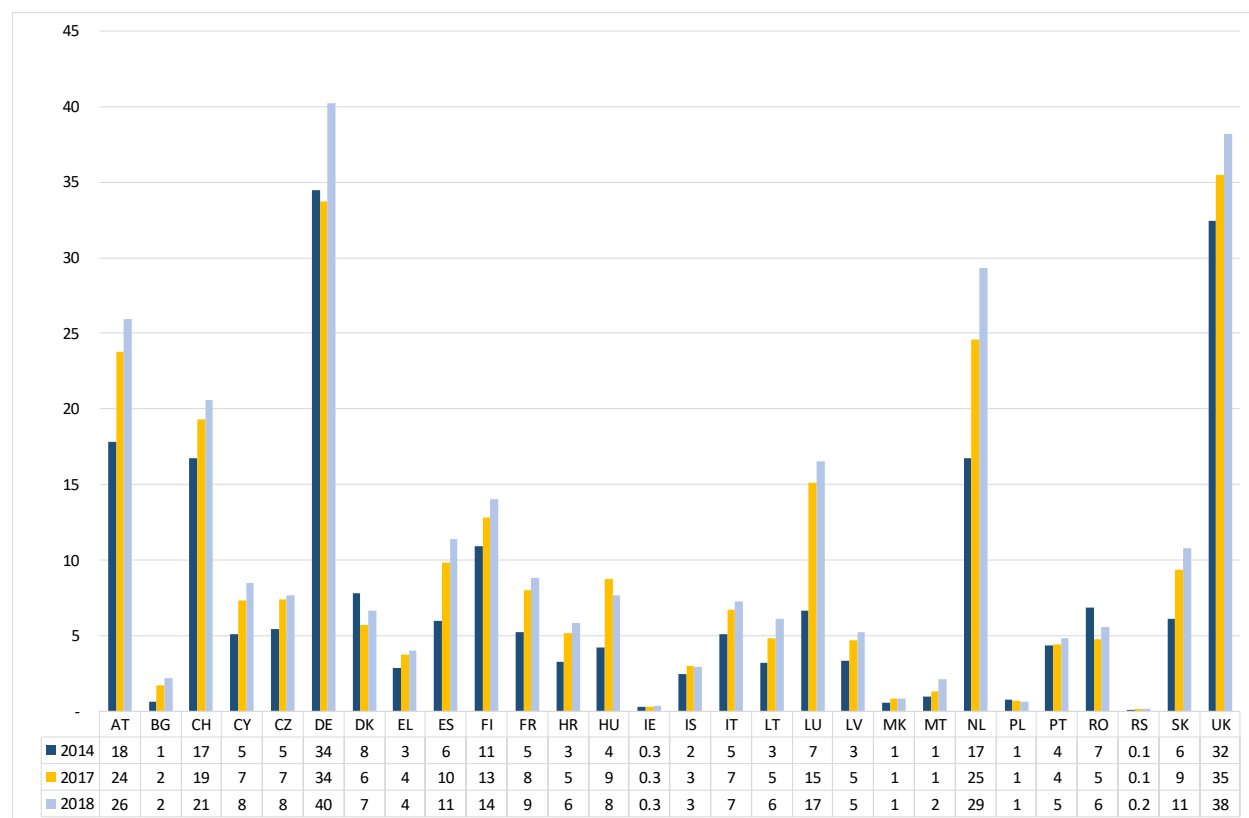
Letter mail volumes per capita continue to decrease in the majority of the countries, with the exception of Bulgaria (+5%), Lithuania (+5%) and Romania (+2%), which increased from 2017. As shown, in the figure below, Switzerland and Finland have the highest per capita letter mail, with values being nearly three (3) times as much the 2018 average per capita. These are followed by Austria, Germany and Luxembourg, where the letter mail per capita is approximately twice times as much as the 2018 average per capita.

Figure 36: Total Letter Volume per capita


Notes: Please refer to notes on Figure 28.

Parcel volumes per capita continue to grow in the majority of the countries, with the exception of, Hungary (-13%), Iceland (-3%), Poland (-13%) and Republic of Macedonia (-1%) which decreased from 2017. Although parcel volumes are increasing, the parcel volumes per population rate are still far lower than those of letter volumes per population. Furthermore, the country with the highest parcel per capita is the United Kingdom, with 38 parcels per capita, having an increase of 8% compared to 2017.

Figure 37: Total Parcel Volume per capita



Notes: Please refer to notes on Figure 28.

4.4. Revenues

4.4.1. Revenue trends

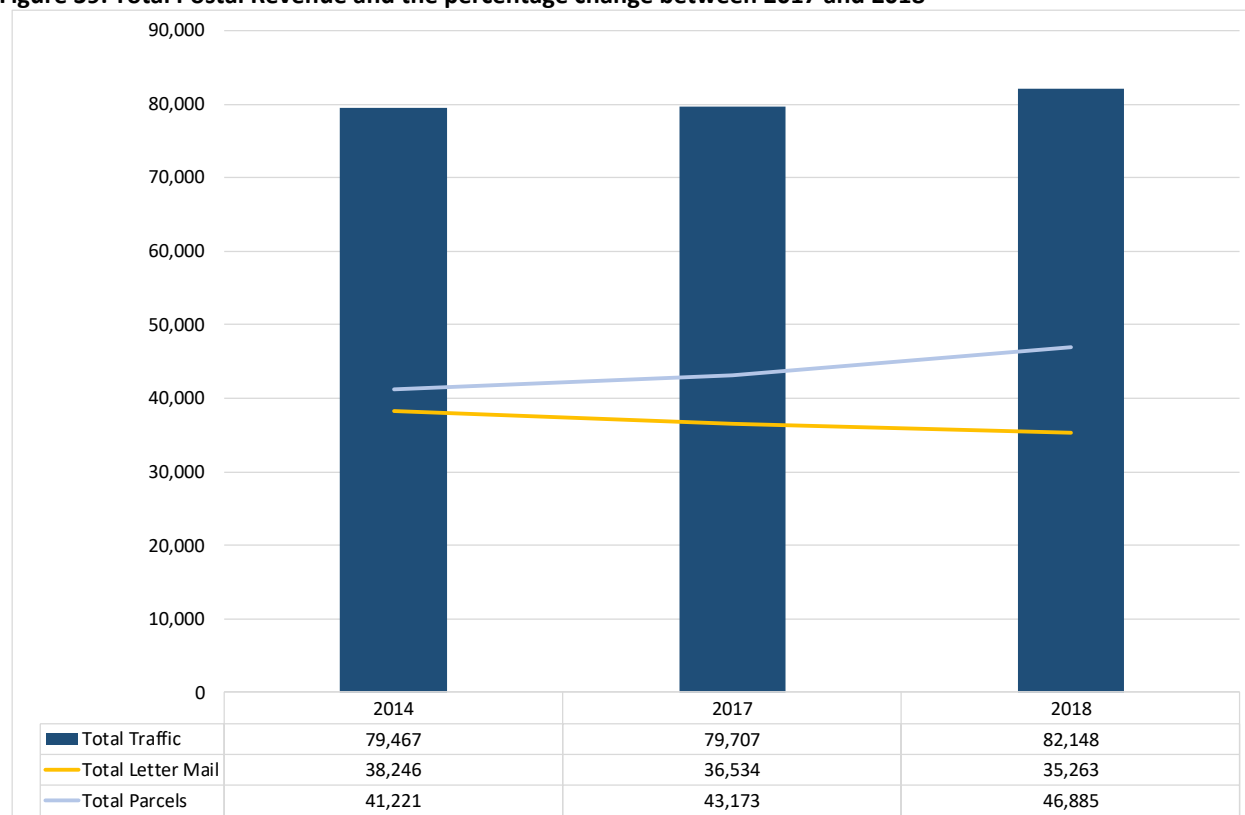
Revenue story is more promising than volumes. In fact, mail revenues grew by around 1% (around €3 billion) when compared to 2014. This increase is mainly due to the boost in parcel revenue, which increased, by 3% (approximately six (6) billion). Conversely, the letter mail revenue decreased, on average, by 2% (nearly three (3) billion). In 2018, parcels account for 57% of the total revenues.

Figure 38: Total Postal Revenue and the percentage change between 2017 and 2018

	2014 (in millions)	2017 (in millions)	2018 (in millions)	Percentage change 2014-2018	Percentage change 2017 - 2018
Total Revenues	79,467	79,707	82,148	+ 3%	+ 1%
Total Letter Mail	38,246	36,534	35,263	- 3%	- 2%
Total Parcels	41,221	43,173	46,885	+ 9%	+ 3%

Notes:

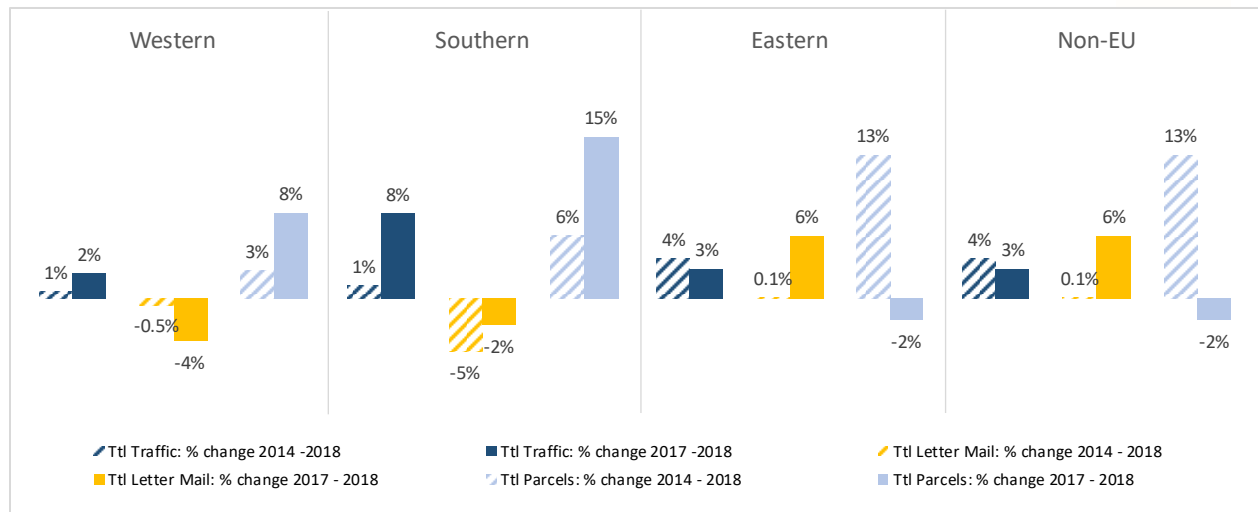
1. The average 2014 – 2018 includes all countries except the following: DK, NO and SE, since data is not provided due to confidentiality.
2. Letters:
 - a. Confidential: BE, EE, FI, IS, LV, MT, NO, SI.
 - b. USO data only: IE, IS, FI.
 - c. ERGP Estimates for: i) 2018: LV; ii) 2016: DE, SI; iii) 2015: DE, LU, SI; iv) 2014: DE, HR, LU, SI
3. Parcels:
 - a. Confidential: BE, EE, FI, IS, LV, MT, NO, SI.
 - b. USO data only: IE, IS, FI, RS.
 - c. ERGP Estimates for: i) 2018: LV; ii) 2016: DE, SI; iii) 2015: DE, LU, SI UK; iv) 2014: DE, HR, LI, SI, UK.
4. IE: Express is not a postal service.
5. RS: Letter post includes postal money order, which is in scope of US.
6. FR: a) Express is excluded and covers only items provided by postal operators, which have an individual license for correspondence, granted by the NRA. b) Break in data series: Before 2017, international inbound volumes were included in domestic items (the segmentation between domestic and inbound items was not available). Since 2017, ARCEP collect data about inbound traffic, which are no longer included in domestic items. This leads to a break in the data series for domestic items (both for letters and for parcels). c) In 2017, a change was introduced in the methodology (change of scope) leading to a break in the data series: the small international packages (inbound and outbound), which were previously counted in the category of letter post, are now included in the parcels.
7. CZ: The CTU changed the methodology of data collection from the year 2017 and is able to distinguish revenues in more detailed way than in the past, when it was possible to distinguish revenues only from services comparable with US and from other postal services. Now we send revenues from the year 2017 fulfilled in the same methodology as volumes.
8. LT: Total revenues also include revenues from unaddressed mail and revenues from other activity related to postal service.

Figure 39: Total Postal Revenue and the percentage change between 2017 and 2018

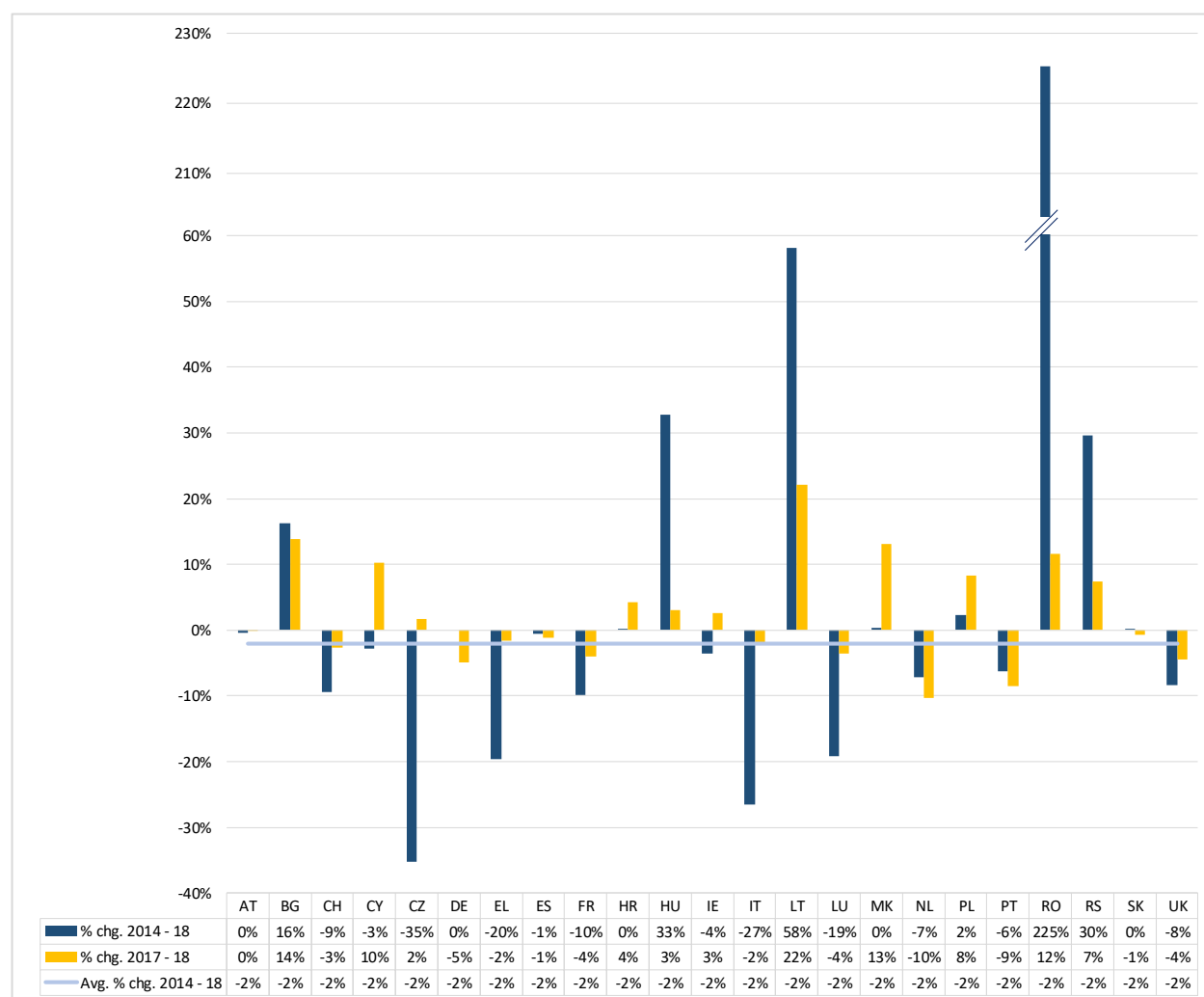
Notes: Please refer to notes on figure 38.

The table above reflects how the revenue performance during last year, where revenue continued to increase particularly for the parcels, due to the ongoing growth of e-Commerce, while, letter mail revenue decreased. This trend can be seen in all regions except for the Eastern regions, which when comparing 2014 to 2018, increased in letter revenue (+ 6%) and decreased in parcel revenue (- 2%).

Figure 40: Total Revenue – percentage change from 2017 to 2018

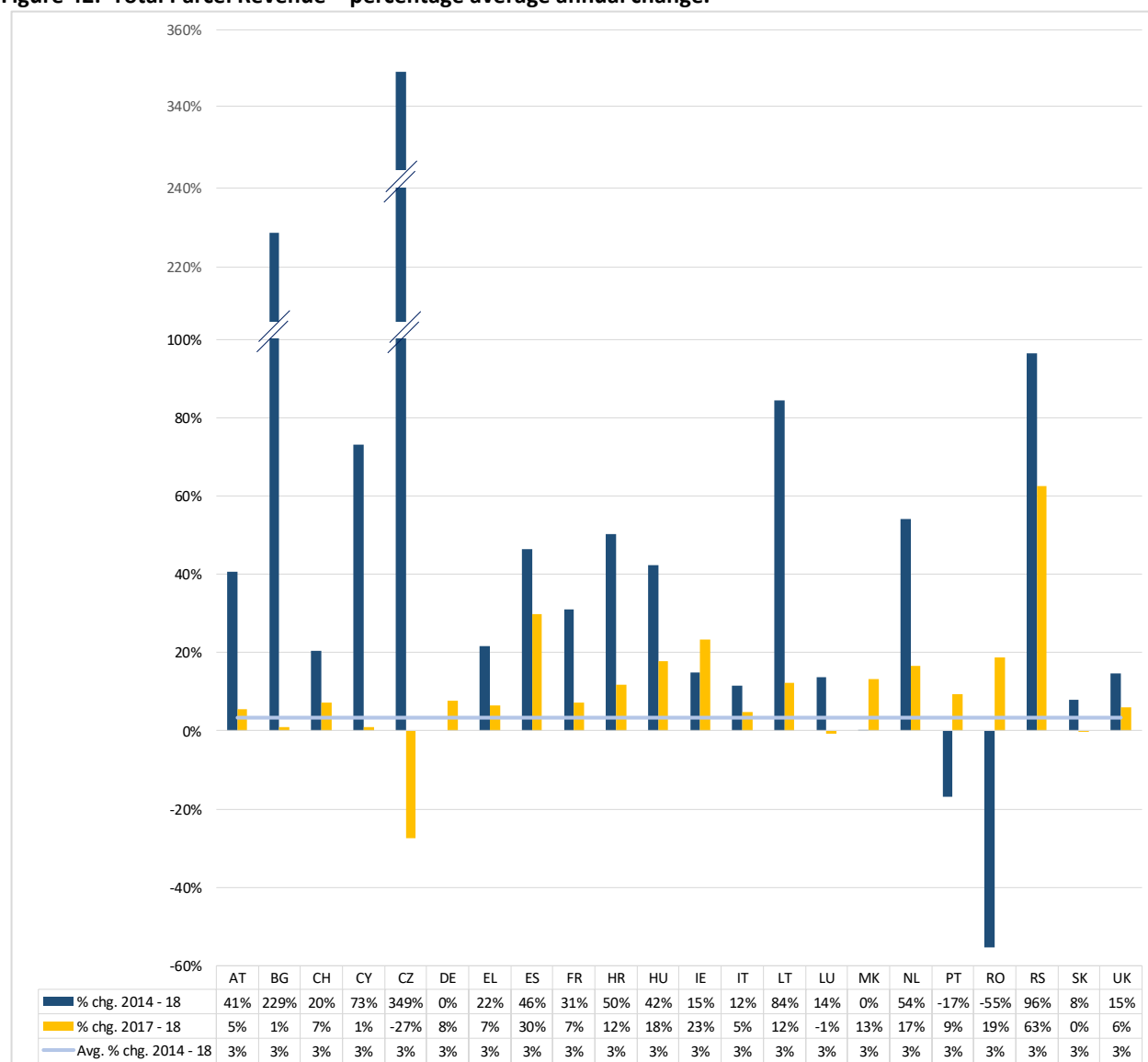


As pointed out, letter mail revenues continue to register a drop in the majority of the countries in the last two years, apart from Bulgaria, Croatia, Cyprus, Czech Republic, Estonia, Hungary, Ireland, Lithuania, Malta, Poland, Republic of North Macedonia, Romania, Serbia, and Slovenia which registered an increase varying from 2% to 24%. From these countries, Croatia, Czech Republic, Estonia, Hungary, Ireland, Malta, Republic of North Macedonia and Slovenia had a drop in the volumes. On the other hand, Finland, Netherlands and Portugal had the highest drop, with a decrease of 9% to 10% from 2017.

Figure 41: Total Letter Revenues – percentage average annual change.

Notes:

- The average 2014 – 2018 includes all countries except the following: DK, NO and SE, since data is not provided due to confidentiality.
 - Letters: a) Confidential: BE, EE, FI, IS, LV, MT, NO, SI; b) USO data only: IE, IS, FI; c) ERGP Estimates for: 2018: LV; 2016: DE, SI; 2015: DE, LU, SI; 2014: DE, HR, LU, SI.
- IE: Express is not a postal service.
- RS: Letter post includes postal money order, which is in scope of US.
- FR: a) Express is excluded and covers only items provided by postal operators, which have an individual license for correspondence, granted by the NRA. b) Break in data series: Before 2017, international inbound volumes were included in domestic items (the segmentation between domestic and inbound items was not available). Since 2017, ARCEP collect data about inbound traffic, which are no longer included in domestic items. This leads to a break in the data series for domestic items (both for letters and for parcels). c) In 2017, a change was introduced in the methodology (change of scope) leading to a break in the data series: the small international packages (inbound and outbound), which were previously counted in the category of letter post, are now included in the parcels.

Parcel revenue grew by 9% between 2017 and 2018, the same growth of parcel volumes. This implies that volumes and revenues increased at the same rate when comparing 2018 to 2017. This growth is reflected in almost all of the countries, with Malta registering the highest increase (34%). Conversely, Czech Republic and Luxembourg reported a decrease when compared to 2017.

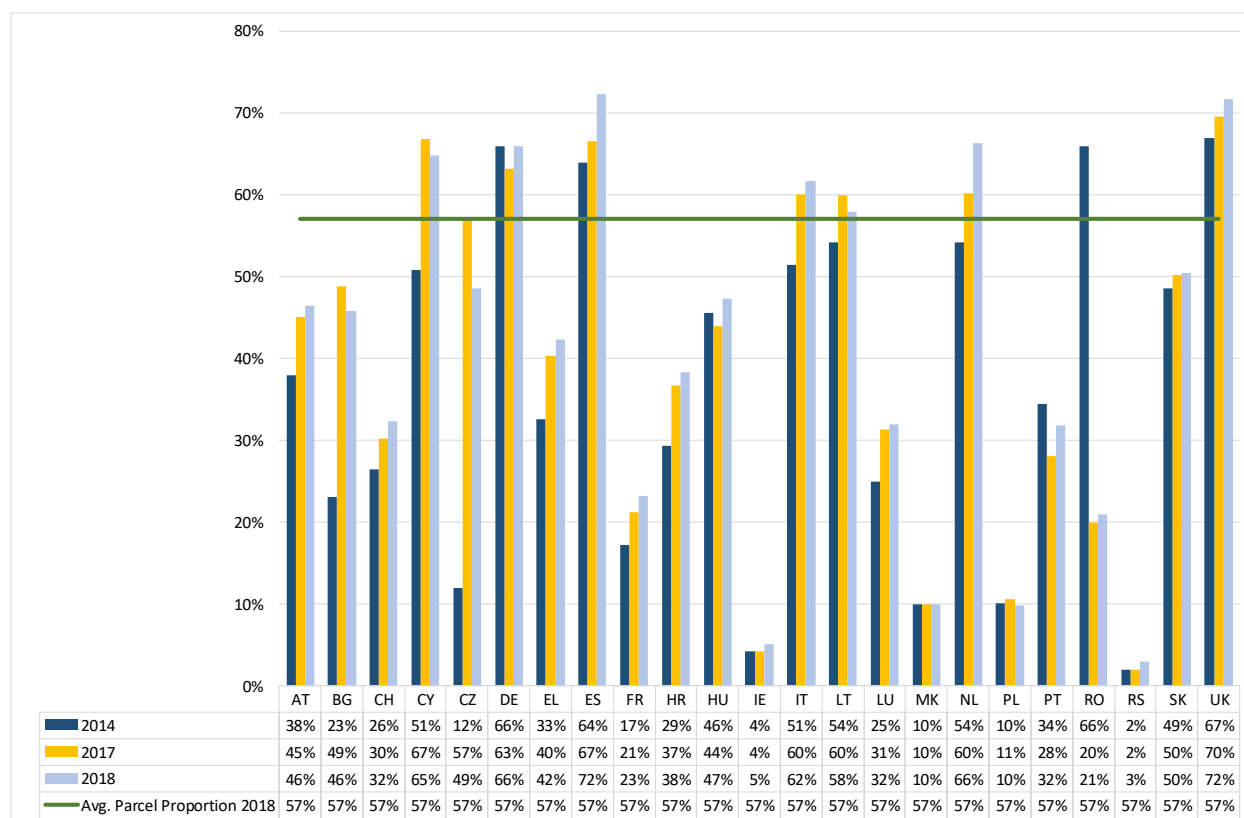
Figure 42: Total Parcel Revenue – percentage average annual change.


Notes:

1. The average 2014 – 2018 includes all countries except the following: DK, NO and SE, since data is not provided due to confidentiality.
2. Parcels: a) Confidential: BE, EE, FI, IS, LV, MT, NO, SI; b) USO data only: IE, IS, FI, RS; c) ERGP Estimates for: 2018: LV; 2016: DE, SI; 2015: DE, LU, SI UK; 2014: DE, HR, LI, SI, UK.
3. IE: Express is not a postal service.
4. RS: Letter post includes postal money order, which is in scope of US.

4.4.2. The proportion of postal revenue

From the volumes, it was noted that the parcel share is growing from one year to another. The revenue share follows a similar path, growing from 52% in 2014 to 57% in 2018. The proportion varies per country as shown in the figure below.

Figure 43: Proportion of Parcels revenue in Total revenue

Notes: Please refer to notes on Figure 41.

4.4.3. Revenue per capita²³

Another aspect that is evaluated is the revenue per capita that provides an insight into how much each person spends to post a letter or a parcel. When compared with 2014, total traffic revenue, on average, increased by 1% (nearly €4 per capita). Concerning letter revenue, compared to 2014, on average, decreased by 2% (approximately €7 per capita). Oppositely, parcel revenue increased, on average, by 3% (around €10 per capita).

Figure 44: Total Postal revenues per capita and the percentage change between 2017 and 2018

	2014	2017	2018	Percentage change 2017 - 2018	Annual percentage change 2014 - 2018

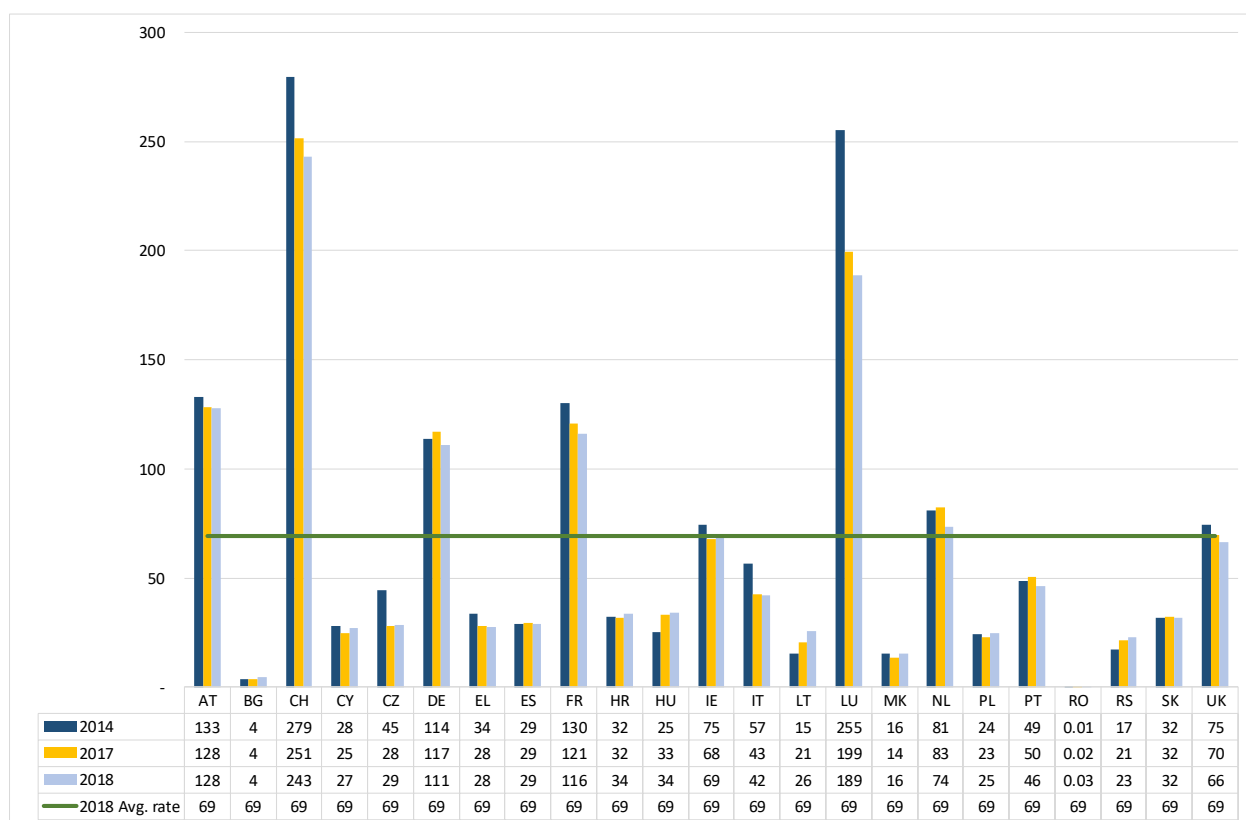
²³ Population source: Eurostat as at 06/06/2019

Total Traffic	€ 156	€ 155	€ 160	+ 3%	+ 1%
Total Letter Mail	€ 76	€ 72	€ 69	- 4%	- 2%
Total Parcels	€ 82	€ 85	€ 92	+ 8%	+ 3%

Notes: Please refer to notes on Figure 38.

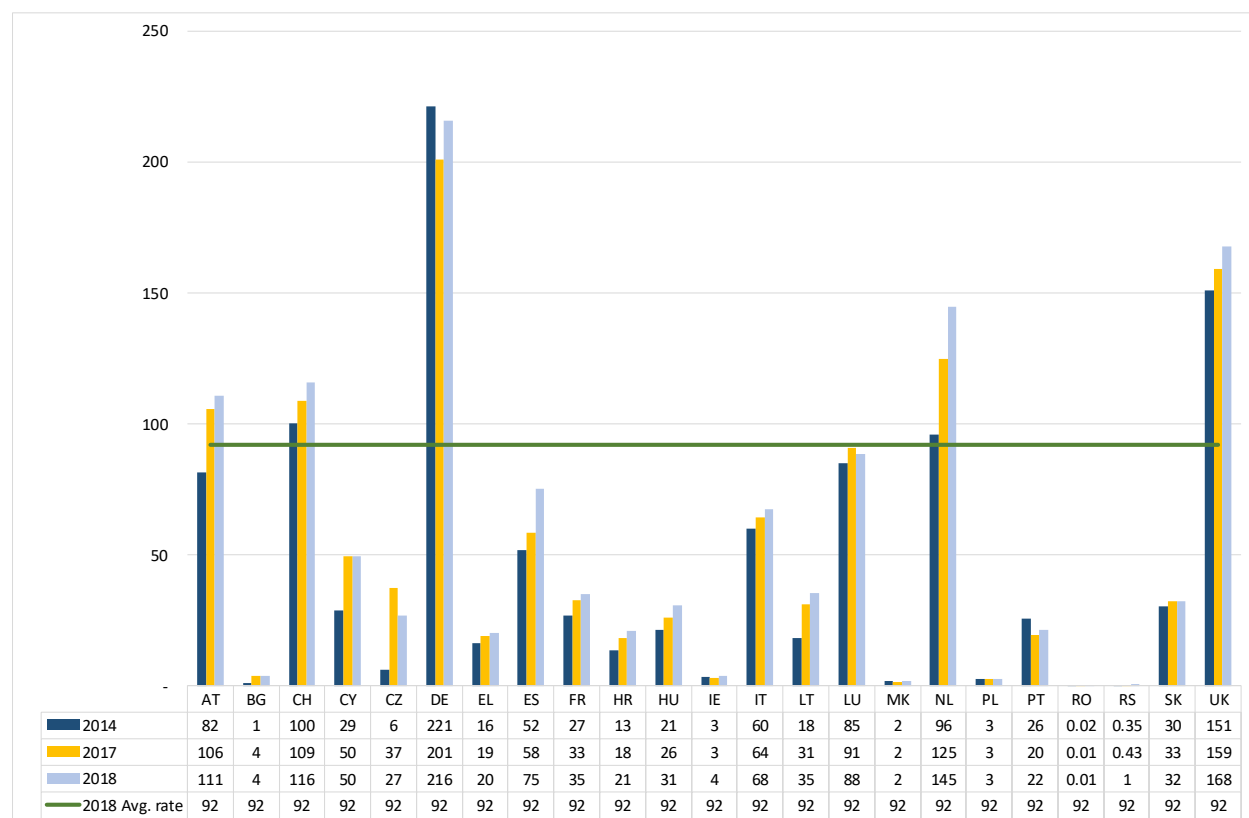
In general, letter mail revenues per capita are decreasing, but only about half of the countries show a decrease when compared to 2017. Countries showing an increase are Bulgaria, Croatia, Cyprus, Czech Republic, Estonia, Hungary, Ireland, Latvia, Lithuania, Malta, Poland, Republic of North Macedonia, Romania, Serbia and Slovenia. The increase varies between 1% and 26%.

Figure 45: Total Letter mail revenues per capita



Notes: Please refer to notes on Figure 38.

In turn, parcels revenue per capita kept growing, with the exception of Czech Republic, Iceland, Luxembourg, and Netherlands. This decrease varies between 1% and 28%.

Figure 46: Total parcel revenues per capita

Notes: Please refer to notes on Figure 38.

4.4.4. Average revenues per item

While the average revenue per item is one of the most useful metrics to indicate the relative value of a postal item, it should be noted that it does not represent the price of sending an item. The average revenue per item can be influenced by a range of factors, such as whether there is a two-tier service for consumers (for example, in the UK there is a D+1 service and a D+3 service available at a uniform price) and the importance of bulk mail, which often has volume-related discounts associated with it, contributes to total mail volumes.

The total revenue per item increased, from €0.99 in 2014 to €1.15 in 2018, that is, on average, there was an increase of 4%. The letter mail revenue per item had only a minor growth of 3% in the past five (5) years (from €0.53 in 2014 to €0.59 in 2018). Parcels, on the other hand, reduced from €5.90 in 2014 to €5.12 in 2018, implying on average, a decrease of 3%.

Figure 47: Average revenue per item and the percentage change between 2017 and 2018

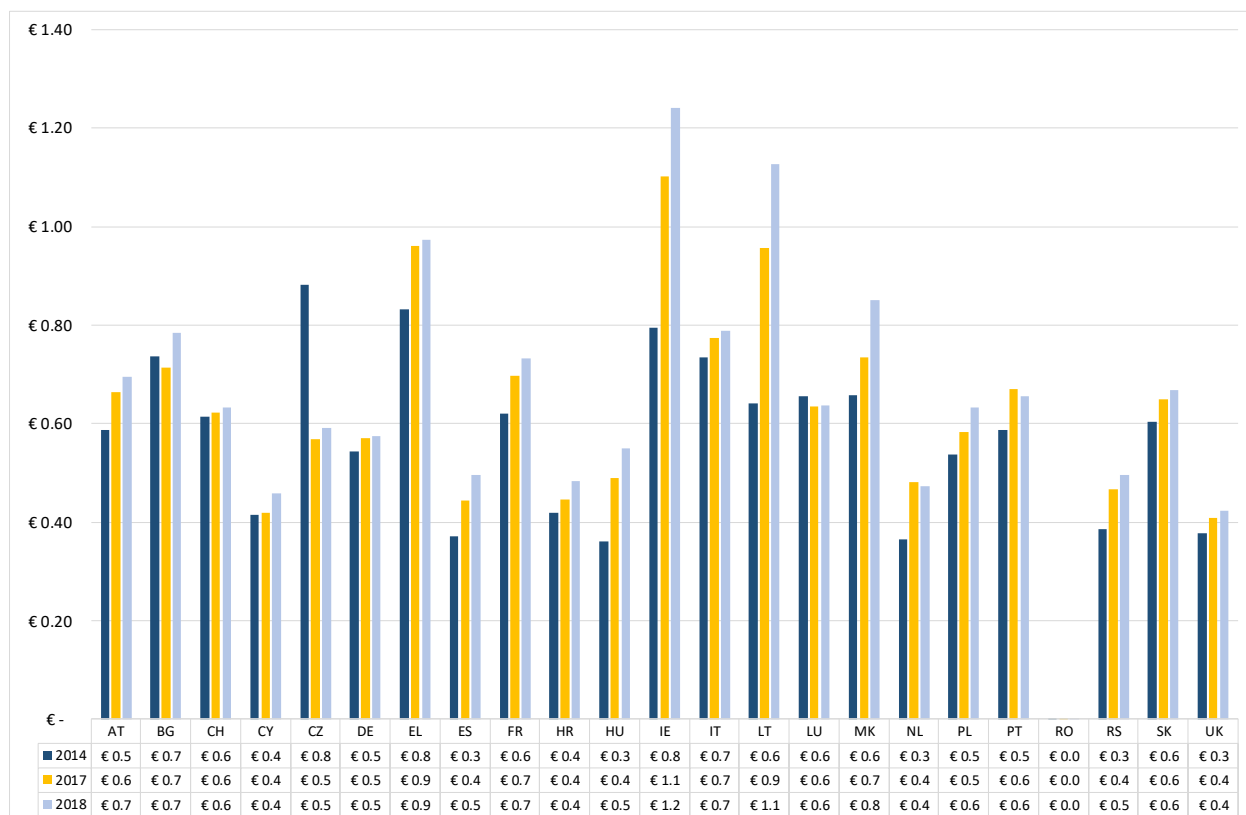
	2014	2017	2018	Percentage change	Annual percentage change
--	------	------	------	-------------------	--------------------------

				2017 - 2018	2014 - 2018
Total Traffic	€ 0.99	€ 1.10	€ 1.15	+ 5%	+ 4%
Total Letter Mail	€ 0.53	€ 0.57	€ 0.59	+ 3%	+ 3%
Total Parcels	€ 5.90	€ 5.35	€ 5.12	- 4%	-3%

Notes: Please refer to notes on Figure 38.

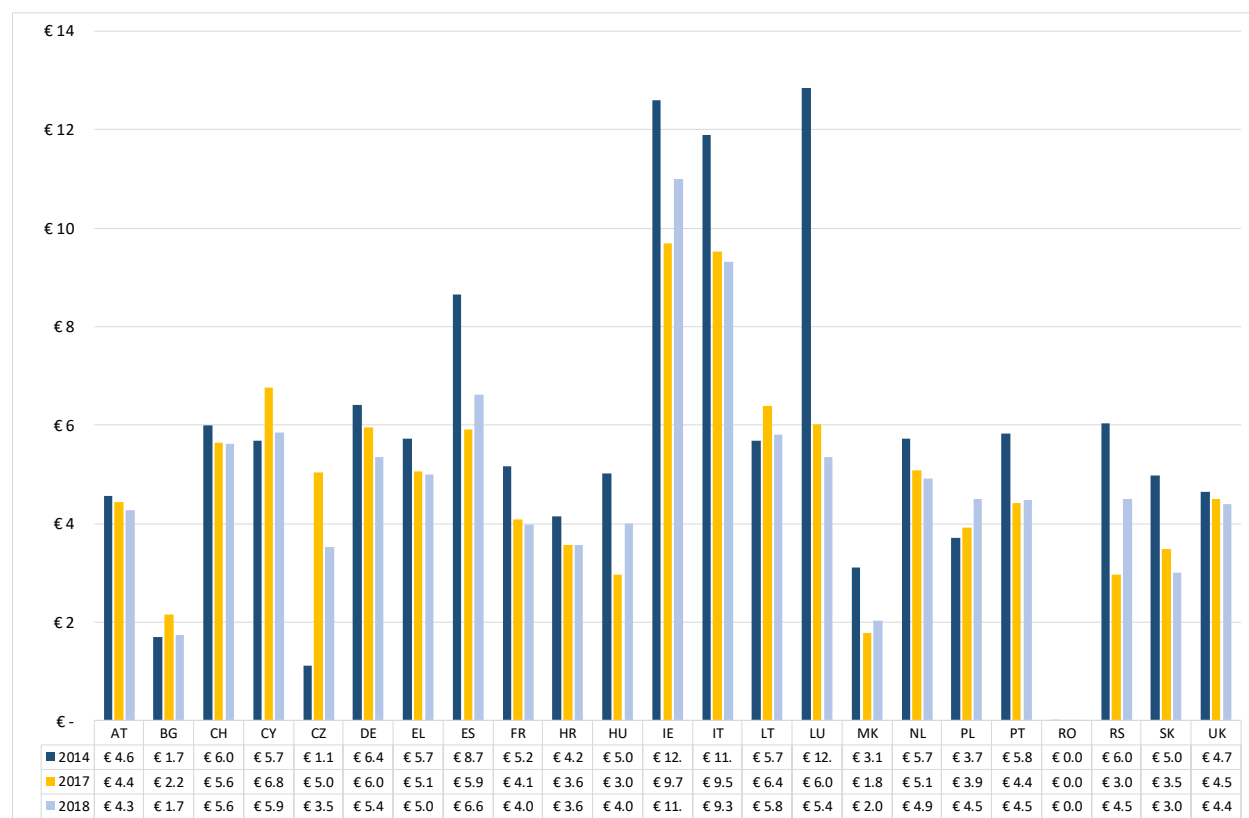
Revenue per letter item increased across the majority of countries between 2014 and 2018, varying from 1% to 19%. On the other hand, Portugal and Netherlands decreased by 2%

Figure 48: Average revenue per letter item



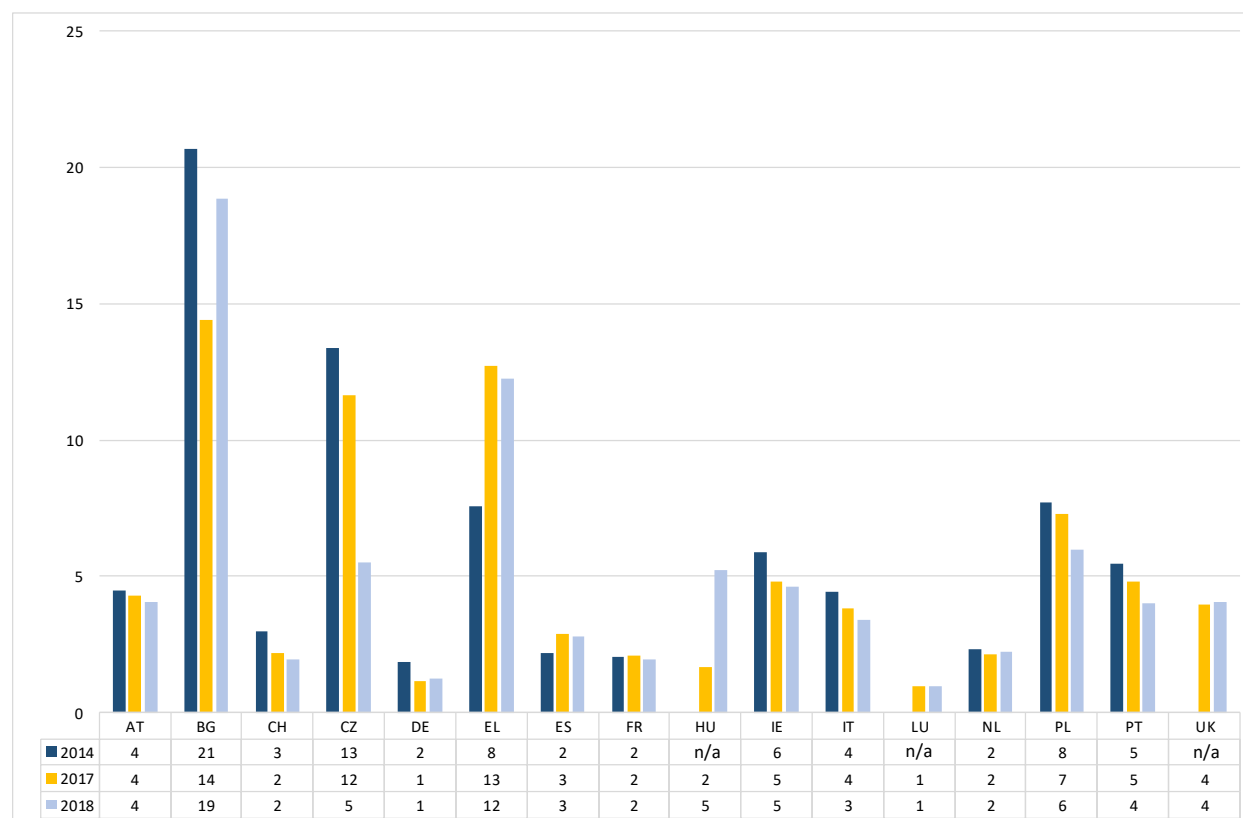
Notes: Please refer to notes on Figure 38.

As expected, the average revenue per parcel item is significantly higher than for letters, but the following countries showed a reduction in prices from 2017, varying from -1% to -30%: Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Germany, Finland, France, Greece, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Slovakia and the United Kingdom.

Figure 49: Average revenue per parcel item


Notes: Please refer to notes on Figure 38.

An interesting aspect for the parcel is to understand the combination of the above rate, split by the various compositions especially the domestic and outbound. From the chart below, it is very clear that the outbound prices are higher than the domestic is, but the difference between them lessened when compared to 2017. For 2018, Bulgaria had the highest average revenue per parcel difference, with the outbound average revenue per parcel being 19 times greater than the domestic is. Contrarily, Luxembourg average revenue per outbound parcel is approximately the same as for the domestic.

Figure 50: Ratio between Domestic and Outbound average parcel rate per item

Notes:

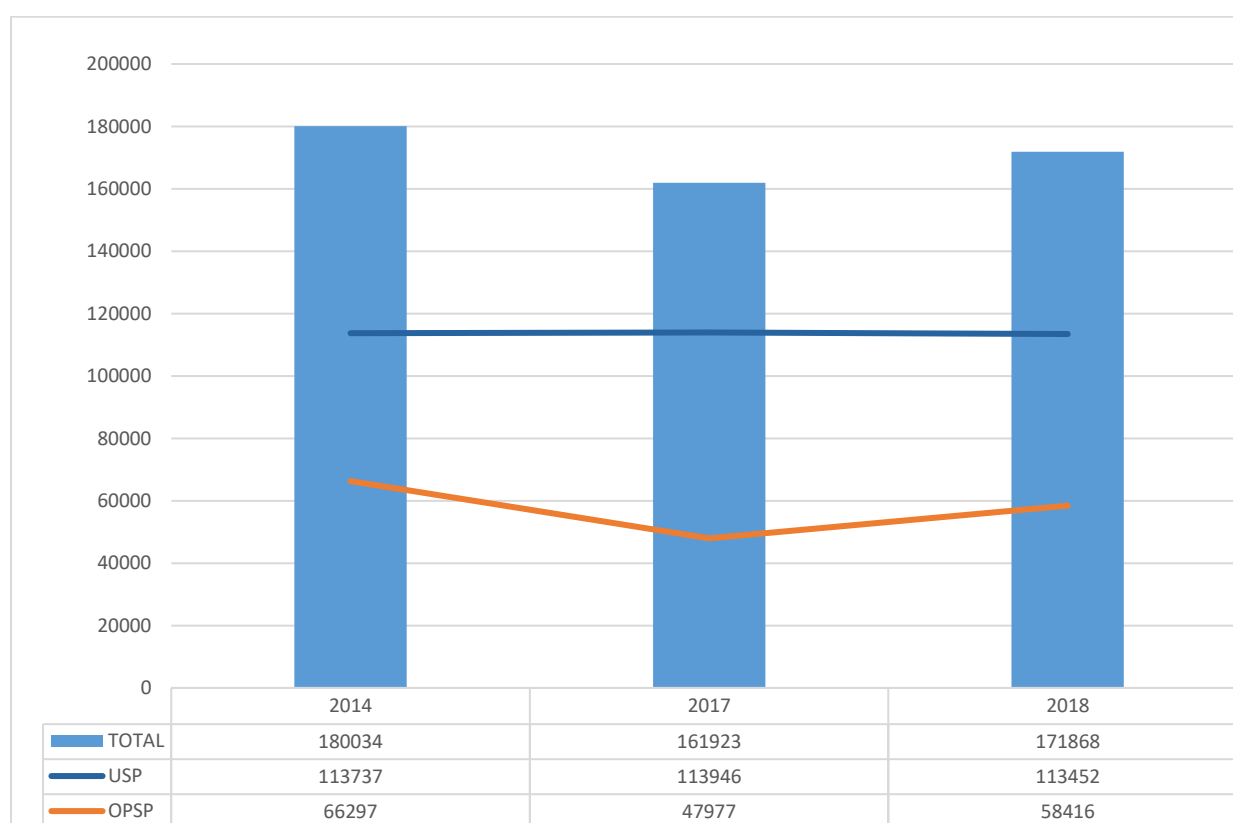
- The average 2014 – 2018 includes all countries except the following: DK, NO and SE, since data is not provided due to confidentiality.
- Parcels:
 - Confidential: BE, EE, ES, FI, IS, LV, MT, NO, SI.
 - USO data only: IE, IS, FI, RS.
 - ERGP Estimates for Domestic and Outbound
 - 2014 - 2016: DE, SI
- IE: Express is not a postal service.
- RS: Letter post includes postal money order, which is in scope of US.
- FR: a) Express is excluded and covers only items provided by postal operators, which have an individual license for correspondence, granted by the NRA. b) Break in data series: Before 2017, international inbound volumes were included in domestic items (the segmentation between domestic and inbound items was not available). Since 2017, ARCEP collect data about inbound traffic, which are no longer included in domestic items. This leads to a break in the data series for domestic items (both for letters and for parcels). c) In 2017, a change was introduced in the methodology (change of scope) leading to a break in the data series: the small international packages (inbound and outbound), which were previously counted in the category of letter post, are now included in the parcels.

4.5.1. Postal establishments

As illustrated in the following figure, and considering the total data for the countries which provided information for both USP and OPSP, between 2014 and 2018 the total number of postal establishments decreased 4.5%, with a slight decrease in the number of USP establishments (-0.3%) and a decrease in the number of postal establishments of OPSP (-11.9%).

The number of USP postal establishments has not changed significantly in the last 2 years. For the OPSP, in 2018 there was an increase in the number of postal establishments, regarding the previous year (21.8%), which is contrary to the trend of decrease observed during 2014-2017.

Figure 51 – Total number of postal establishments by USP and OPSP: 2014-2018



NOTES:

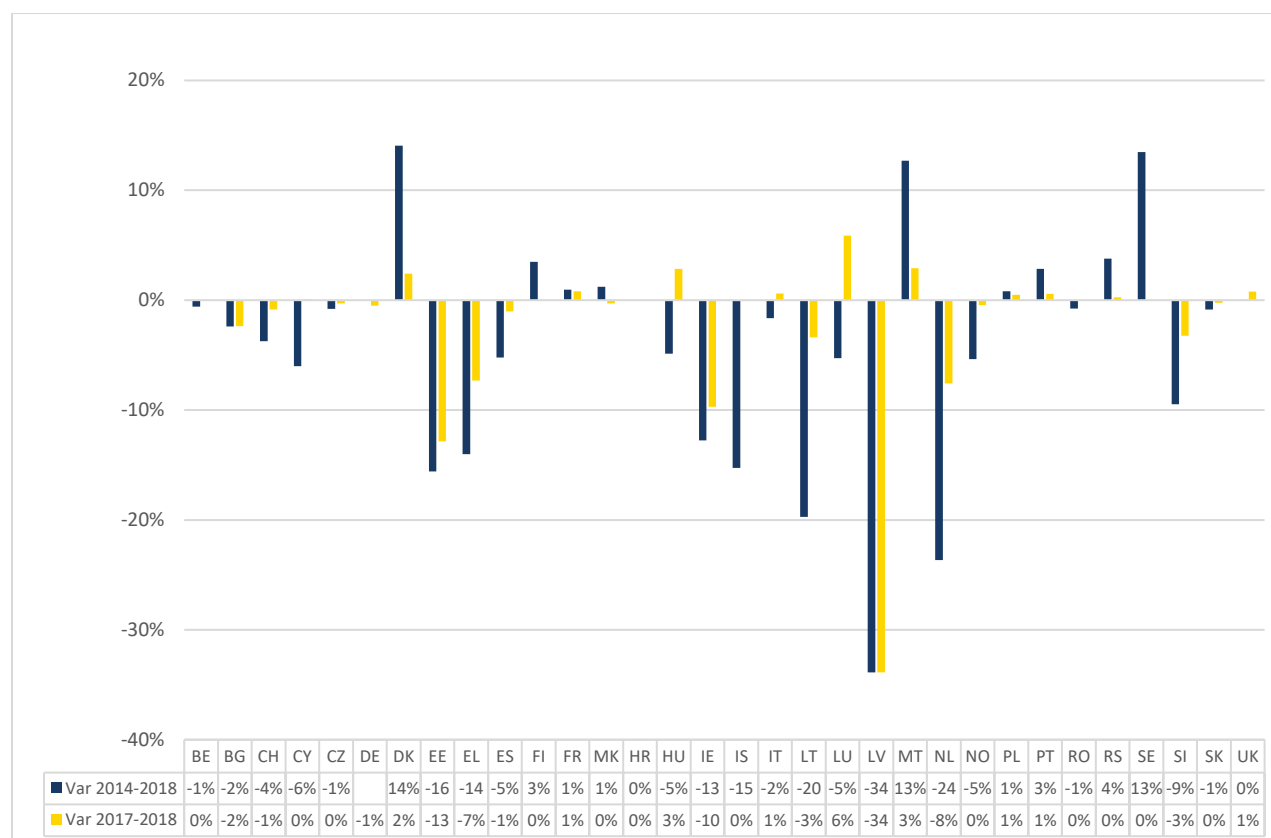
1. Data referring only to countries where data is available regarding postal establishments of both the USP and the OPSP - includes data from all the countries with the exception of DK, ES, FI, FR, IE, IT, LU, LV, NL, NO and UK, which only collect data for the USP and of SE (no data). Contains some estimates according to section on methodology.
2. Postal establishments managed by the USP, USP postal agencies, managed by 3rd entity, and establishments from other postal service providers were considered. USP/incumbent mobile post offices, mail man and other kind of postal establishment were excluded.

The total number of postal establishments varies greatly from country to country. As shown in the figures below, in the majority of ERGP countries the number of USP postal establishments has decreased since 2014. Nevertheless, in some countries the number of postal establishments has increased significantly, as

is the case of DK (14.1%), SE (13.5%) and MT (12.7%). On the other hand, the most significant decreases have been in LV (-33.9%), NL (-23.6%) and EE (-15.6%).

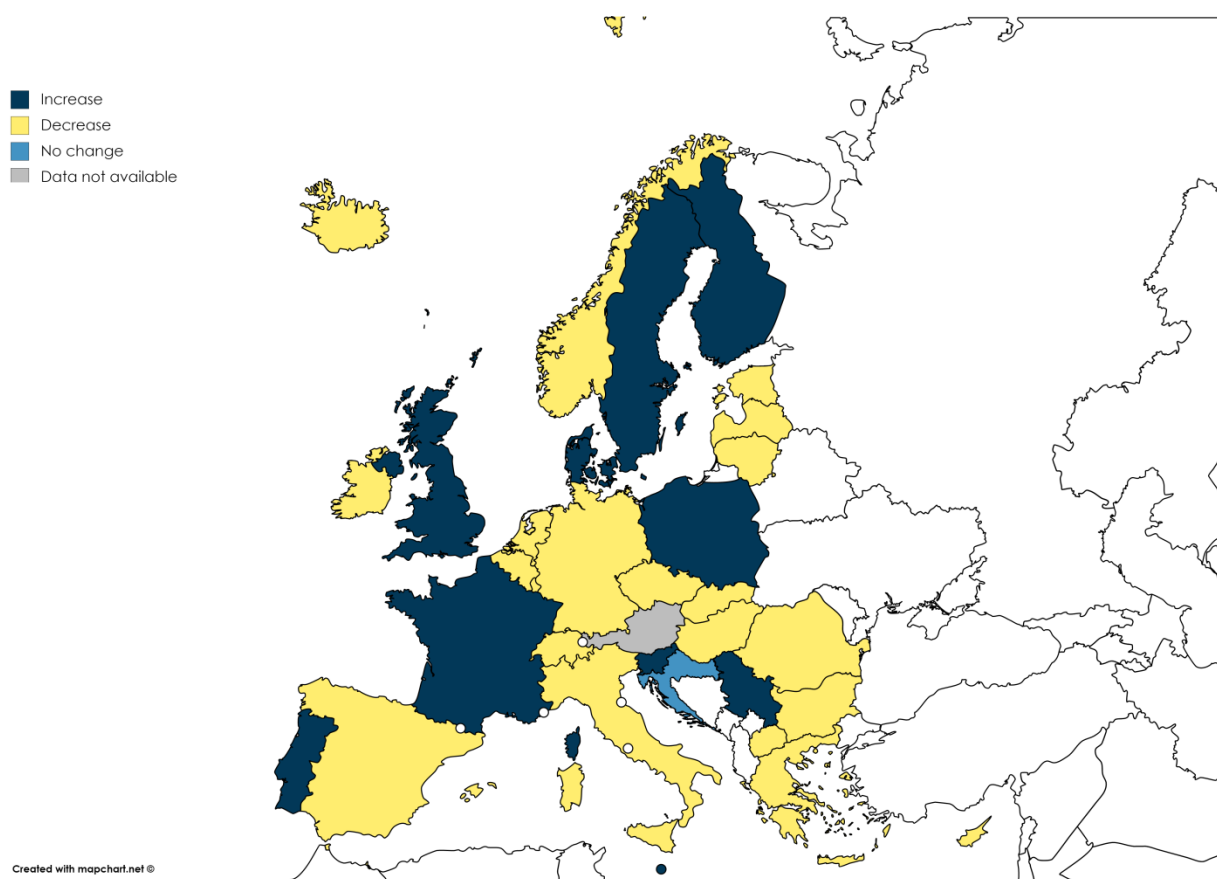
Looking at what has happened between 2017 and 2018, only five countries registering an absolute variation greater than 5%: reductions in LV (-33.9%), EE (-12.9%), IR (-9.7%) and EL (-7.3%) and an increase of 5.9% in LU.

Figure 52 – Percentage change of the USP postal establishments 2014-2018 and 2017-2018



NOTES:

1. Data referring only to countries where data is available regarding postal establishments of the USP. Contains some estimates according to section on methodology.
2. Blank cells represent data not available. In cases where data for 2018 was not available, "variation 2014-2018" represents variation observed until 2017.
3. Postal establishments managed by the USP and USP postal agencies, managed by 3rd entity, were considered. USP/incumbent mobile post offices, mail man and other kind of postal establishment were excluded.

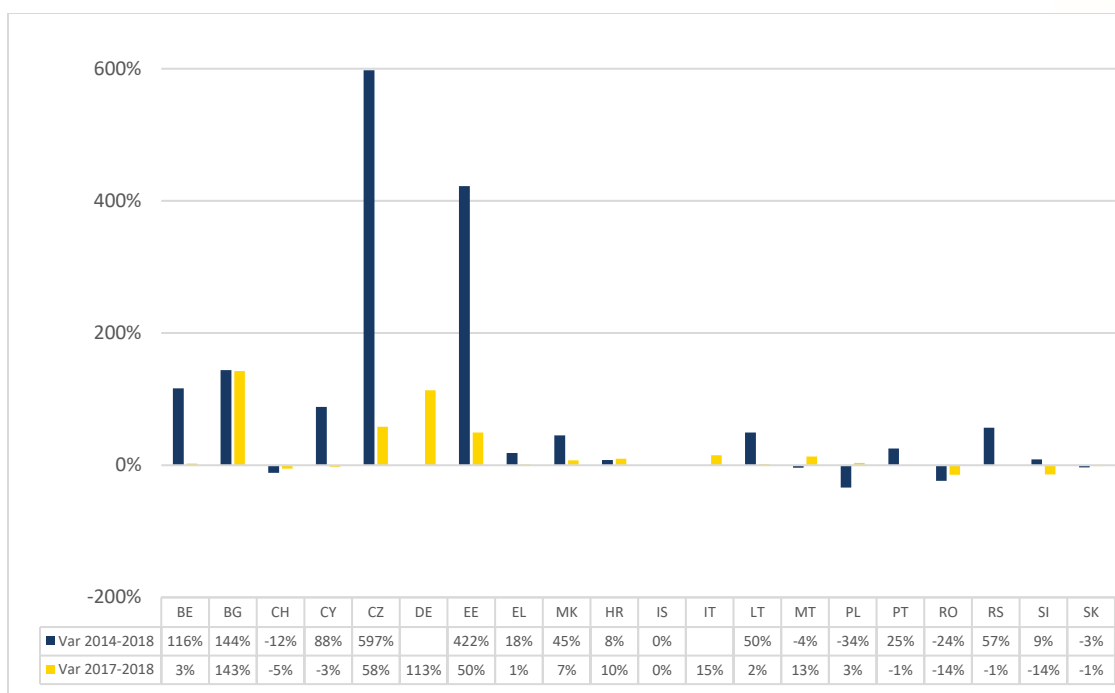
Figure 53 – Percentage change of the USP postal establishments 2014-2018

NOTES: Please refer to notes Figure 52.

Regarding the number of OPSP postal establishments, there has been an increase in 2018 when compared to 2014 for the majority of countries who provided data. As shown in the following figure, this increase was particularly relevant in CZ (+1876 postal establishments), with an increase of 597%. This is mainly due to developments prior to 2018: in CZ there was a significant increase in 2016, which was mainly due to an update in the data collection, with two companies having started to include the number of pick up points.

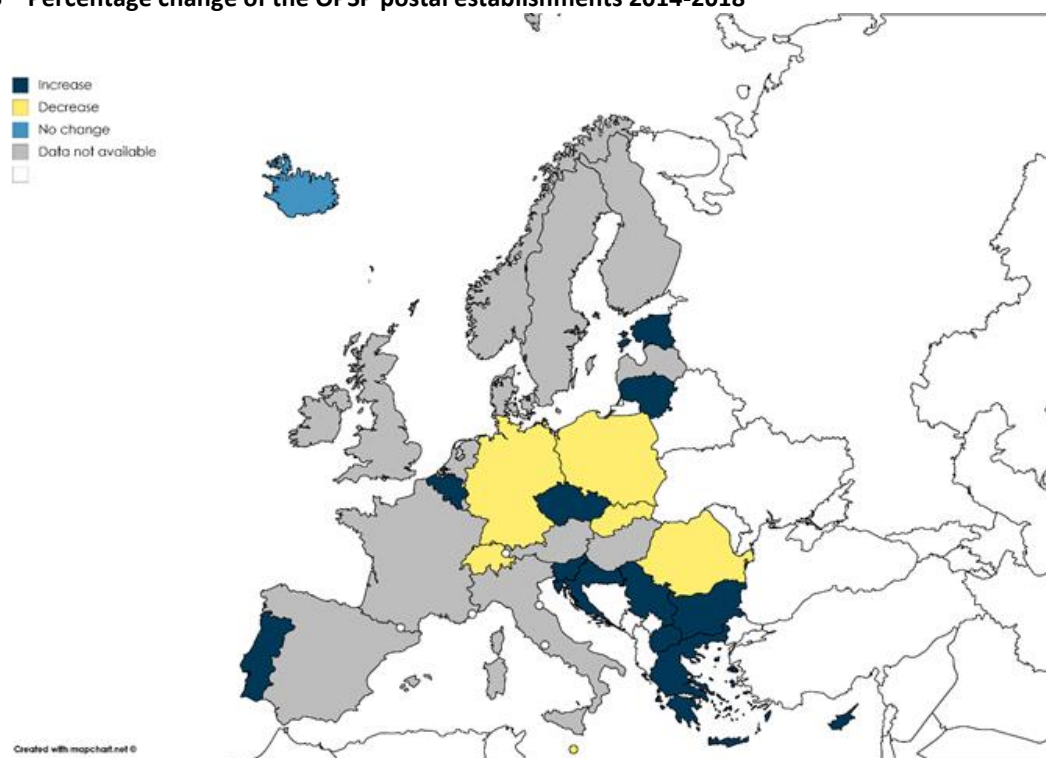
Looking more closely at the developments during 2018, it is noticeable that the changes in the number of OPSP postal establishments since 2017 were less significant. Notwithstanding, there were significant increases in BG (142.6%), DE (113%), CZ (58.2%) and EE (49.6%), while in 4 other countries there have been absolute variations higher than 10%: increases of 15.2% in IT and 13.0% in MT and a decrease in RO (-14.5%) and SI (-14.1%).

Figure 54 – Percentage change of the OPSP postal establishments 2014-2018 and 2017-2018



NOTES: 1. Data referring only to countries where data is available for postal establishments of OPSP. Contains some estimates according to section on methodology. Blank cells represent data not available. In cases where data for 2018 was not available, "variation 2014-2018" represents variation observed until 2017. 2. SI: variation 2015-2018. Introduction of parcel shops by an operator in 2015.

Figure 55 – Percentage change of the OPSP postal establishments 2014-2018



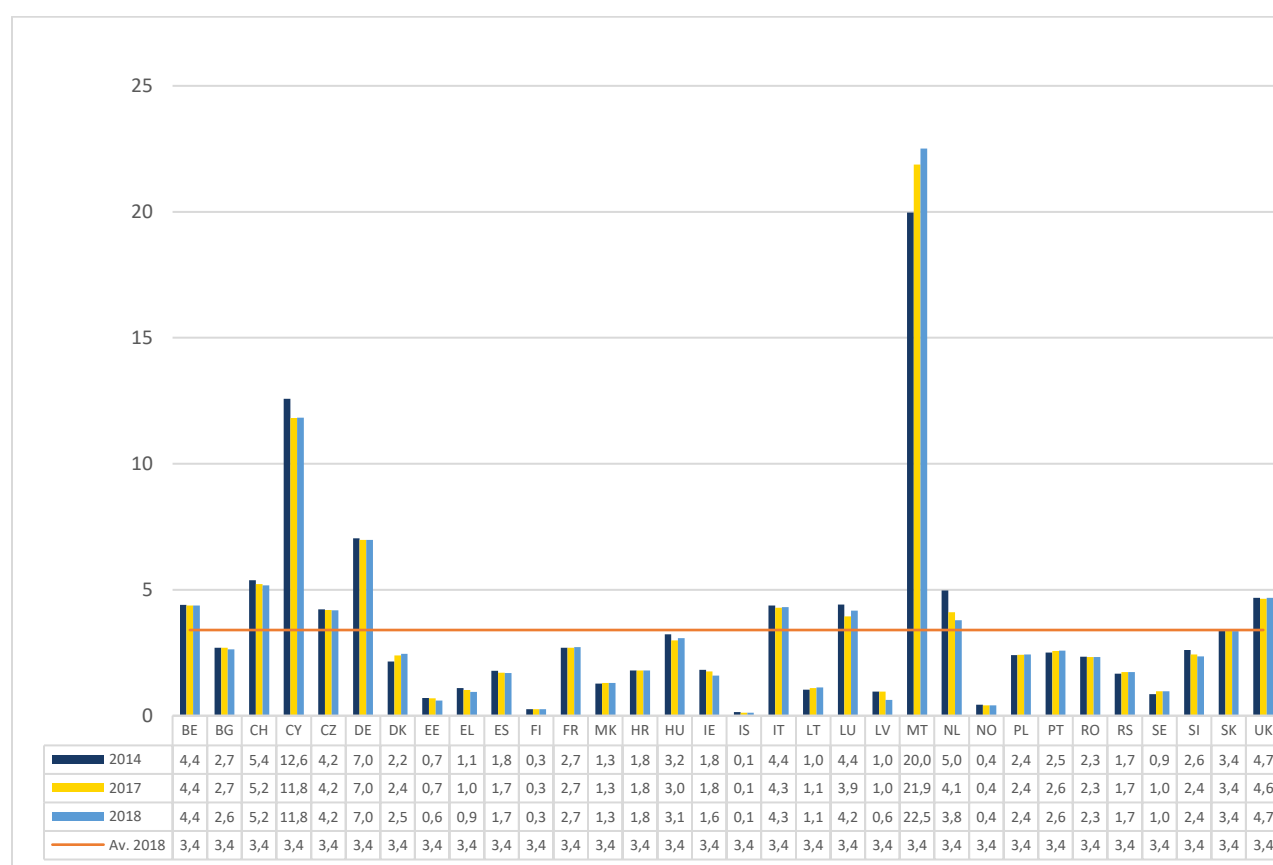
NOTES: Please refer to notes Figure 54.

4.5.2. Postal establishments per area

Taking into account the distribution of postal establishments in the country, the number of USP postal establishments per 100km² is very heterogeneous amongst ERGP countries, varying, in 2018, from 0.12 in IS to 22.5 in MT, as illustrated in the following figure.

It is also noticeable that there has not been a significant change in the number of USP postal establishments per 100km² since 2014 for the majority of countries. It should also be noted that for the countries that were able to provide data in 2018, only in four of them the number of USP postal establishments per 100km² is higher than 5 (CH, CY, DE and MT).

Figure 56 – Postal establishments per 100km²: USP only



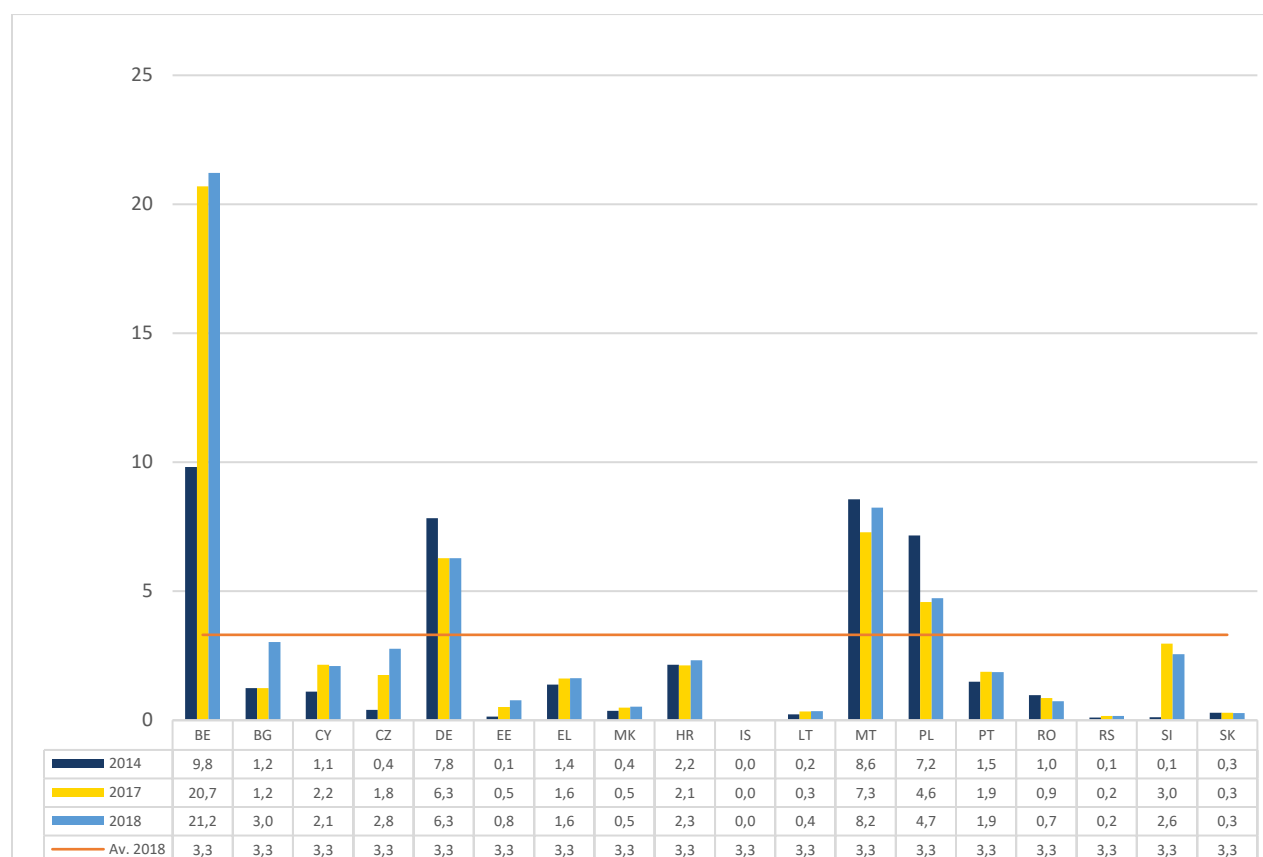
NOTES:

1. Country area data from Eurostat.
2. Data referring only to countries where data is available regarding postal establishments of the USP.
3. Blank cells represent data not available.
4. Contains some estimates according to section on methodology.
5. Postal establishments managed by the USP and USP postal agencies, managed by 3rd entity were considered. USP/incumbent mobile post offices, mail man and other kind of postal establishment were excluded.
6. MT includes offices selling stamps.

As to the number of OPSP postal establishments per 100km², a similar situation occurs, with no significant change in 2018 when compared to 2014 in terms of absolute numbers, with the exception of BE, which is

mainly due to an increase in the number of OPSP postal establishments observed in 2016. Notwithstanding, data may be influenced by the fact that some locations are shared by operators and therefore double counting of locations can cause an artificial increase of the real number, which is why data should be considered as indicative only. In 2018 only in three of the countries that were able to provide data the number of OPSP postal establishments per 100km² is higher than 5 (BE²⁴, DE and MT).

Figure 57 – Postal establishments per 100km²: OPSP



NOTES:

1. Country area data from Eurostat. Data referring only to countries where data is available regarding postal establishments of OPSP.
2. Blank cells represent data not available.
3. Contains some estimates according to section on methodology.

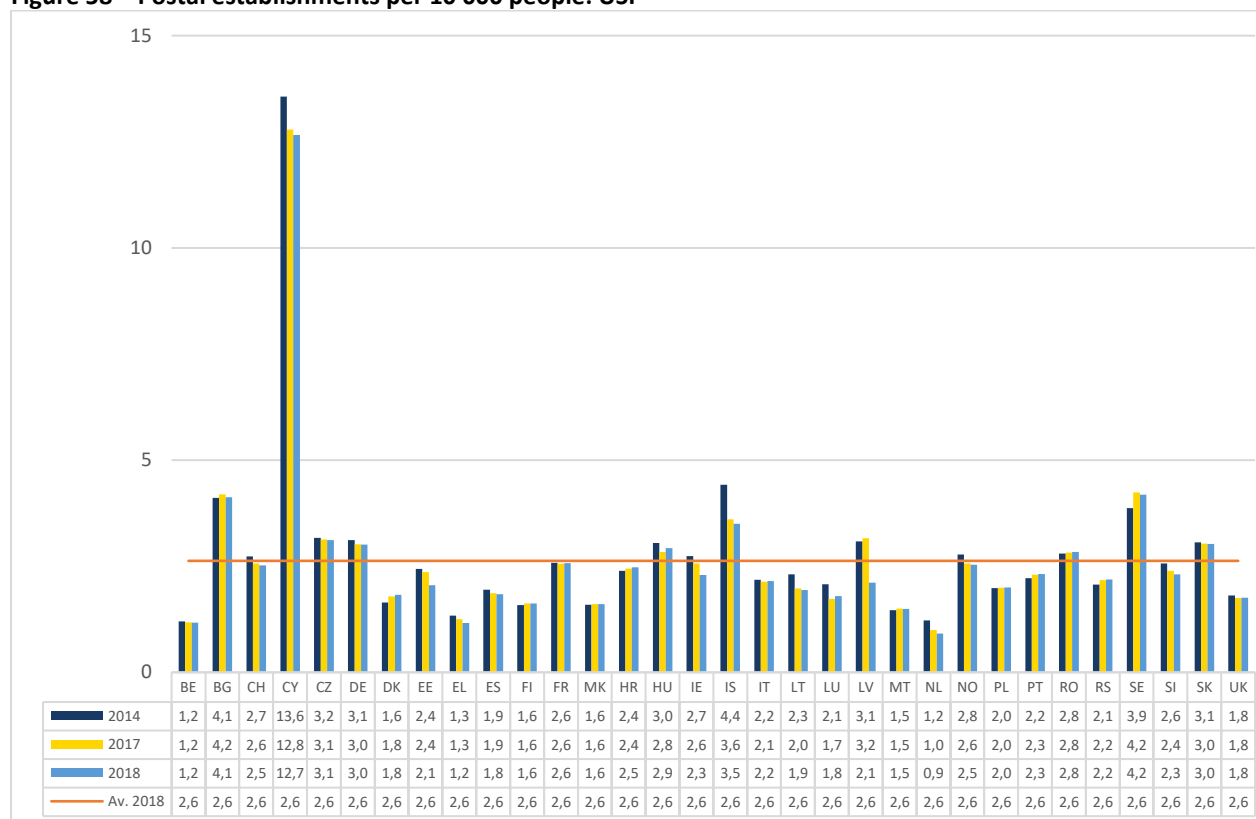
4.5.3. Postal establishments per population

Taking into account the population of each country, it is possible to conclude that the ratio of postal establishments per 10 000 people is also heterogeneous across ERGP countries, similarly to what is observed regarding distribution according to country area. In 2018 this ratio ranges from 0.9 postal establishments per 10 000 people in NL to 12.7 in CY for the USP, and from 0.03 postal establishments per

²⁴ Mainly parcel shops.

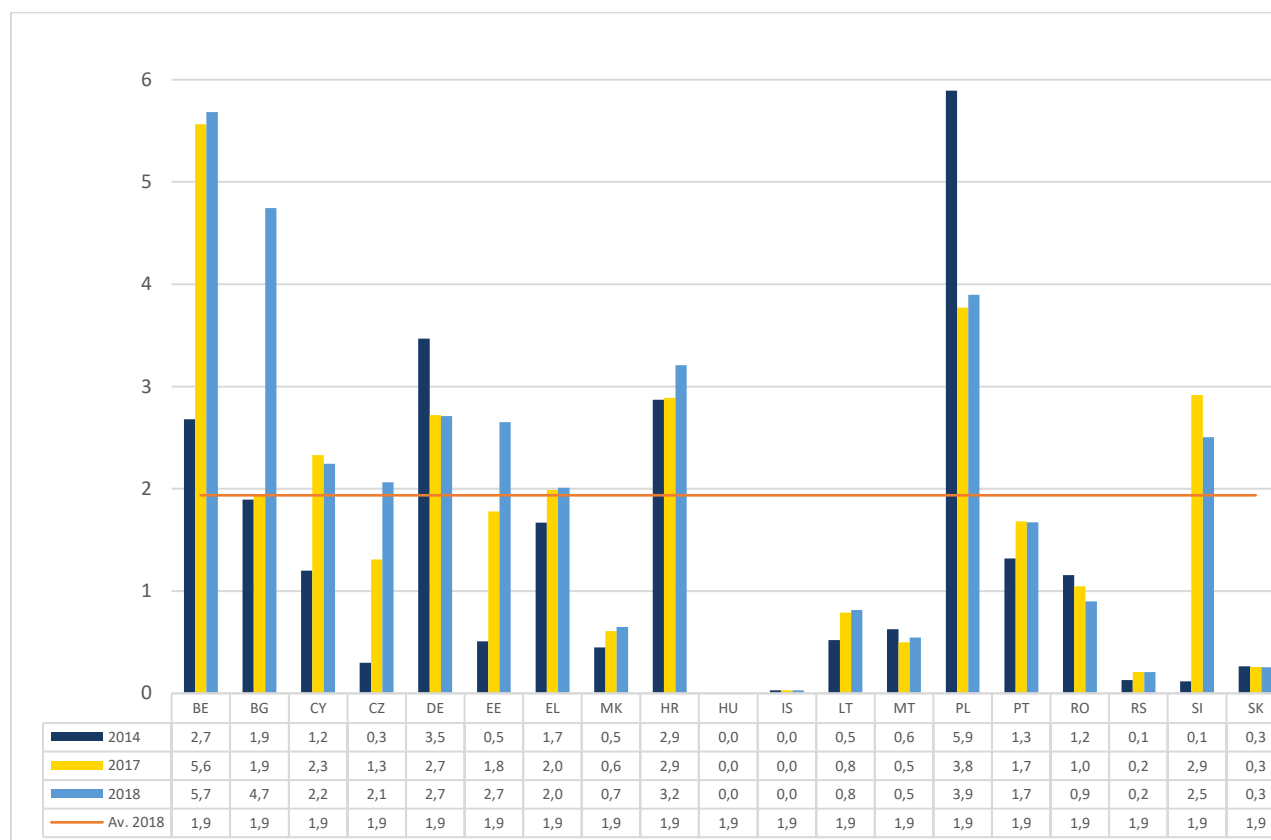
10 000 people in IS to 5.7 in BE for the OPSP. For the majority of countries, the ratios observed in 2018 do not change significantly from the ones in 2014. Regarding the USP postal establishments, 9 countries register an absolute percentage change greater than 10% when comparing 2018 to 2014: increase of 11% in DK, and decreases of 32% in LV, 25% in NL, 21% in IS, 16% in EE, IE and LT and 13% in LU and EL. When analysing the ratio of OPSP postal establishments per 10 000 people, the variations between 2014 and 2018 appear to be more significant, with 4 countries presenting increases higher than 100%: BG, CZ, EE and SI. In 6 other countries there has been a decrease in this ratio: DE, IS, MT, PL, RO and SK. Notwithstanding, in both cases, even though the percentage variations can appear significant, the actual number does not appear to have a significant relevance.

Figure 58 – Postal establishments per 10 000 people: USP



NOTES:

1. Country population data from Eurostat. 2. Data referring only to countries where data is available regarding postal establishments of the USP. 3. Blank cells represent data not available. 4. Contains some estimates according to section on methodology. 5. Postal establishments managed by the USP and USP postal agencies, managed by 3rd entity were considered. USP/incumbent mobile post offices, mail man and other kind of postal establishment were excluded.

Figure 59 – Postal establishments per 10 000 people: OPSP**NOTES:**

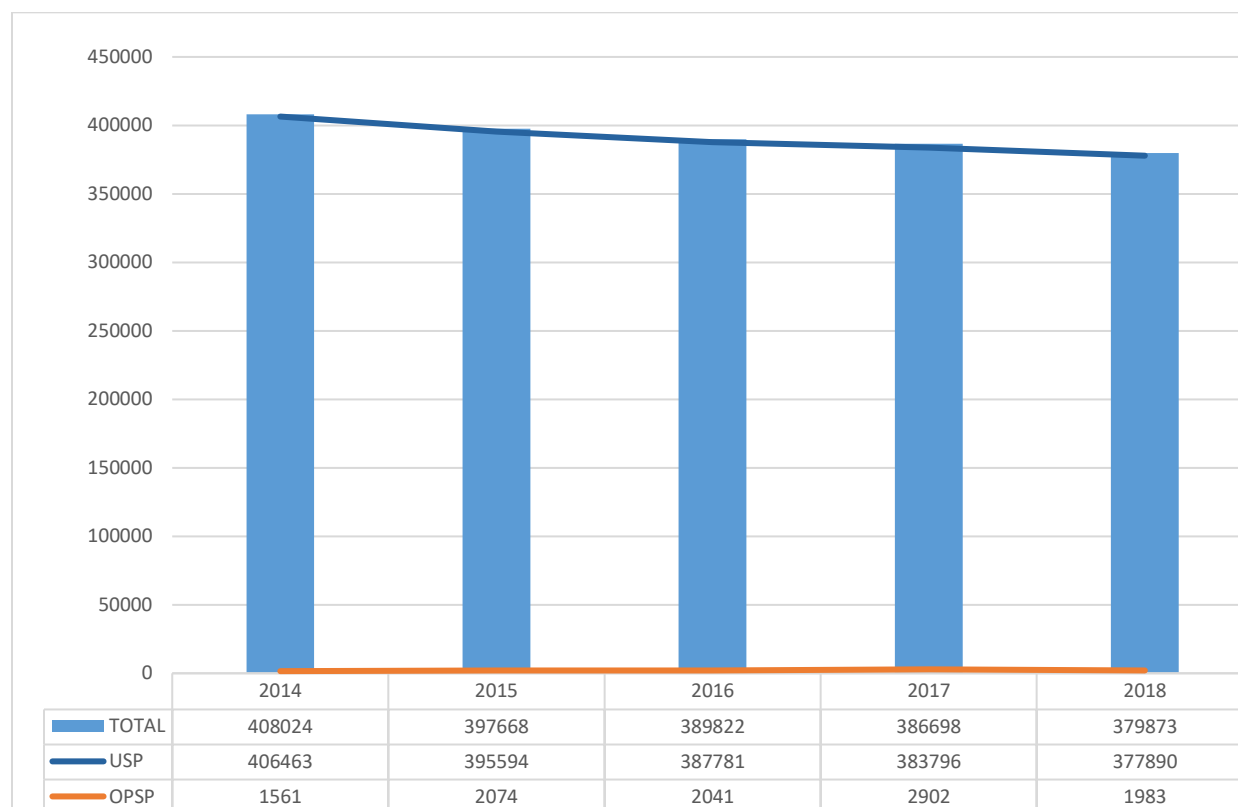
1. Country population data from Eurostat.
2. Data referring only to countries where data is available regarding postal establishments of OPSP.
3. Blank cells represent data not available.
4. Contains some estimates according to section on methodology.

4.5.4. Letterboxes²⁵

As illustrated in the following figure, and considering the total data for the countries that provided information, between 2014 and 2018 the number of USP letterboxes decreased 6.9%.

The number of USP letterboxes has decreased every year since 2014 (between -1.0% and -2.7% per year). For the USP, in 2018 there was a decrease of 1.5% in the number of letterboxes. For the OPSP, there is only data available for BE, BG and RO.

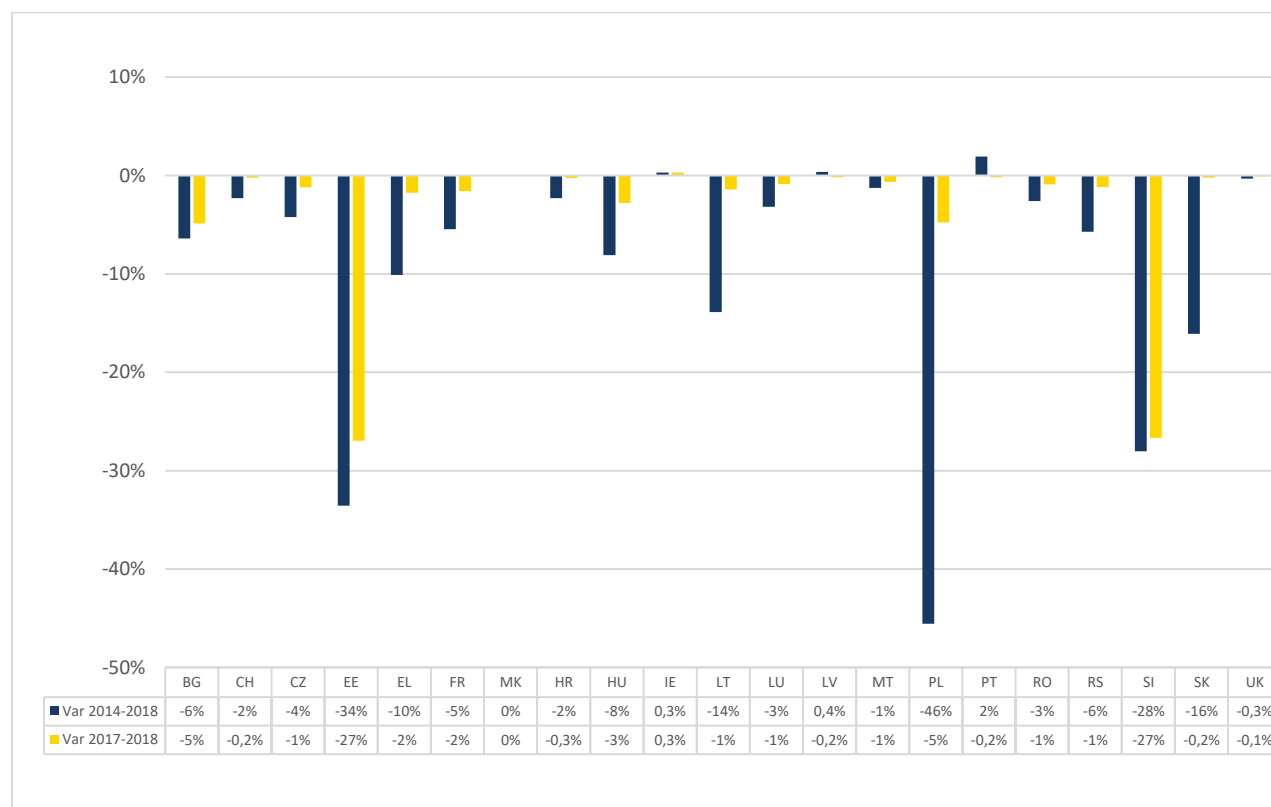
²⁵ Letterboxes are those where postal items may be deposited by the customers, either at public locations either at the premises of the providers.

Figure 60 – Total number of letterboxes by USP and OPSP: 2014-2018**NOTES:**

Data referring only to countries where data is available since 2014: BE, BG, CH, CZ, EE, EL, FR, MK, HR, HU, IE, LT, LU, LV, MT, PL, PT, RO, RS, SI, SK, and UK.

The total number of letterboxes varies greatly from country to country. In this respect, it should be noted that the data presented above is significantly influenced by data from FR and UK, which both accounts for 65% of the total number of letterboxes presented in the figure above.

As shown in the figure below, in the majority of ERGP countries the number of USP letterboxes has decreased since 2014. The exceptions are the slight increases in PT (1.9%), LV (0.4%) and IE (0.3%). On the other hand, the most significant decreases have been in PL (-45.6%), EE (-33.6%), SI (-28%) and SK (-16.1%). Looking to the period 2017 and 2018, only two countries registered absolute variations greater than 5%: EE (-27%) and SI (-26.7%). The only country where the number of letterboxes increased in 2018 was IE (0.3%).

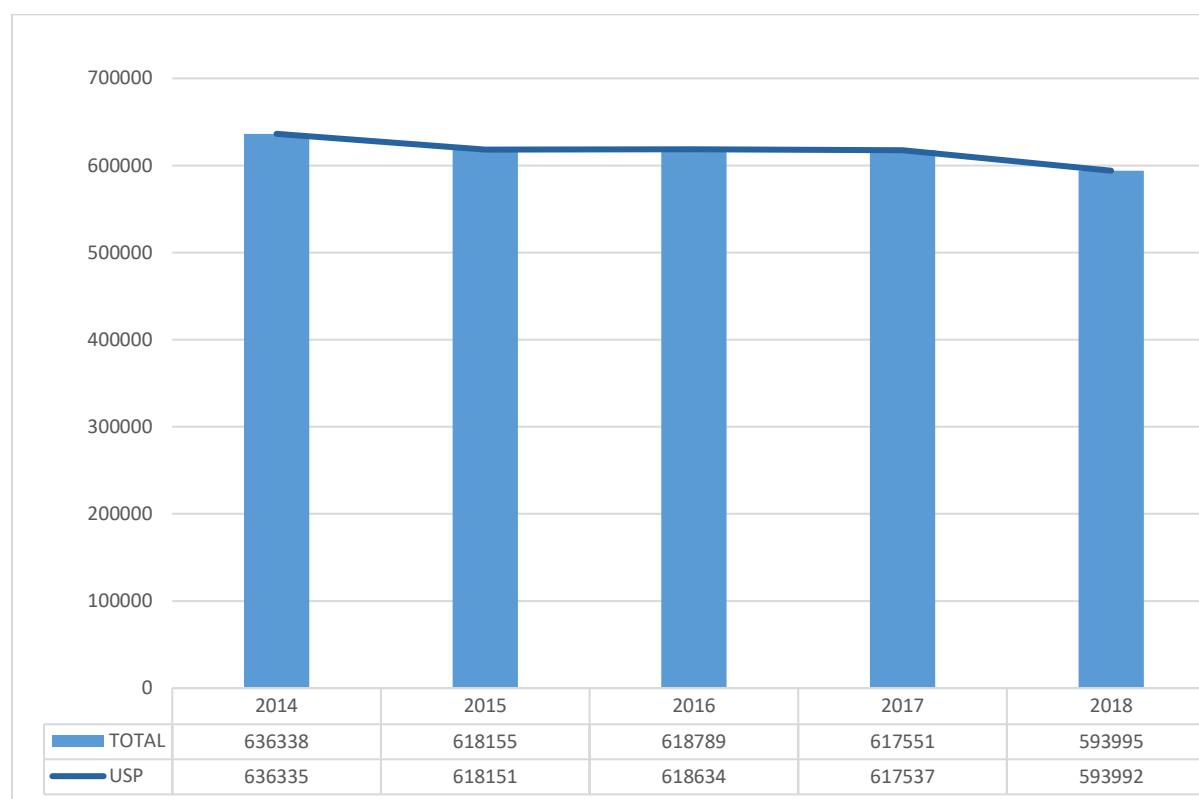
Figure 61 – Percentage change of the USP letterboxes 2014-2018 and 2017-2018**NOTES:**

1. Data referring only to countries where data is available. Contains some estimates according to section on methodology.
2. Blank cells represent data not available. In cases where data for 2018 was not available, "variation 2014-2018" represents variation observed until 2017.

4.5.5. Post office boxes²⁶

As illustrated in the following figure, and considering the total data for the countries that provided information, between 2014 and 2018 the number of post office boxes decreased 6.7%. In 2018, the number of post office boxes diminished 3.8%. For the OPSP, there is only data available for RO.

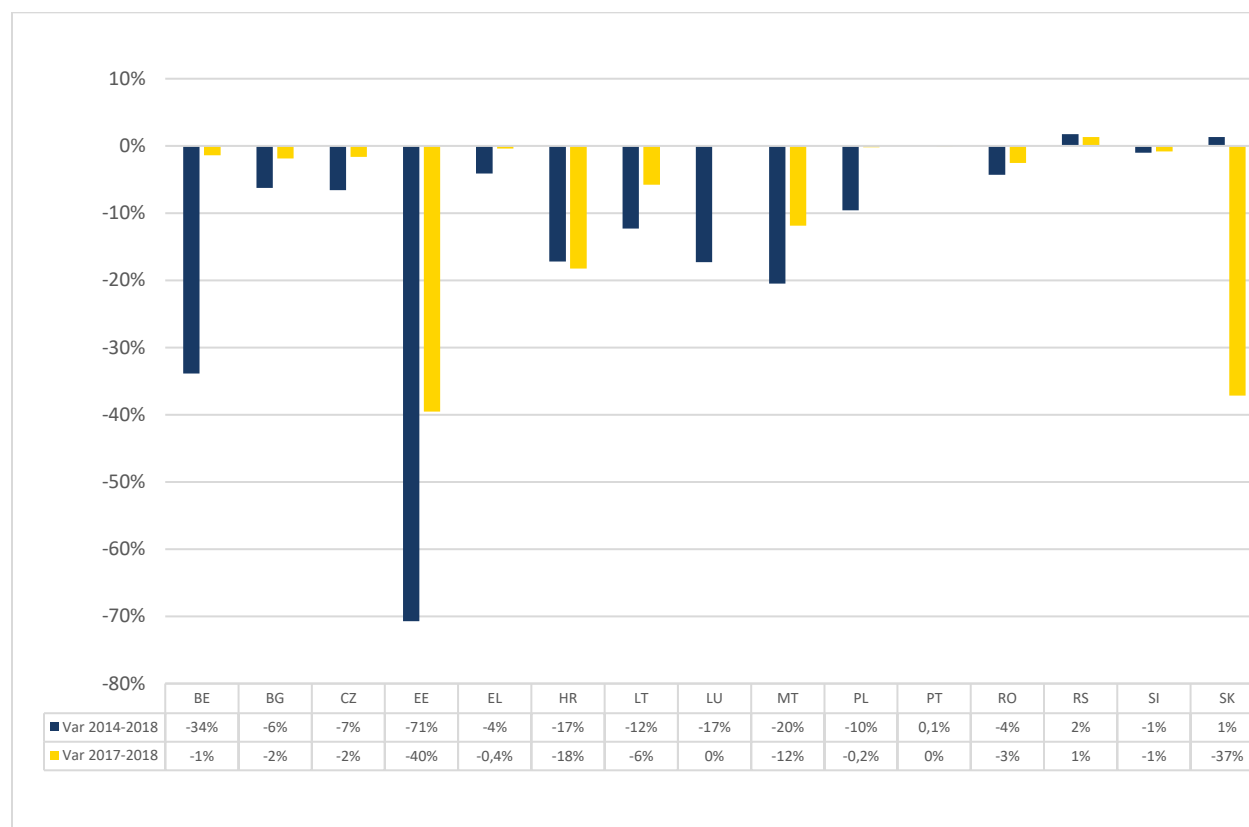
²⁶ Post office box is a facility available to users at their request where the mail is delivered instead of their actual postal address.

Figure 62 – Total number of post office boxes by USP: 2014-2018**NOTES:**

Data referring only to countries where data is available since 2014: BE, BG, CZ, EE, EL, HR, LT, LU, MT, PL, PT, RO, RS, SI and SK.

The total number of post office boxes varies greatly from country to country. In this respect, it should be noted that the data presented above is significantly influenced by data from PT and PL, which both accounts for 47% of the total number of post office boxes presented in the figure above.

As shown in the figure below, in the majority of ERGP countries the number of USP post office boxes has decreased since 2014. Nevertheless, in some countries the number of post office boxes has increased, as is the case of RS (1.7%) and SK (1.3%). On the other hand, the most significant decreases have been in EE (-70.7%), BE (-33.9%), MT (-20.5%), LU (-17.3%) and HR (-17.2%). Between 2017 and 2018, five countries registered an absolute variation greater than 5%: a reduction of 39.6% in EE, 37.1% in SK, 18.2% in HR, 11.9% in MT and 5.8% in LT. The only country where the number of post office boxes increased in 2018 was RS (1.3%).

Figure 63 – Percentage change of the USP post office boxes 2014-2018 and 2017-2018**NOTES:**

1. Data referring only to countries where data is available. Contains some estimates according to section on methodology.
2. Blank cells represent data not available. In cases where data for 2018 was not available, "variation 2014-2018" represents variation observed until 2017.

4.5.6. Parcel Lockers

Parcel lockers are a relatively new solution introduced in the market, and therefore data referring to it is still limited. Nevertheless, in some countries there is already a process of data collection regarding parcel lockers. The following table presents an overview of the number of USP and OPSP parcel lockers in the countries who were able to provide these data.

Figure 64 – Parcel lockers from the USP and the other postal providers – 2014-2018

COUNTRY	USP					OPSP				
	2014	2015	2016	2017	2018	2014	2015	2016	2017	2018
BE	-	150	150	151	180	-	1	2	2	2
BG	-	-	-	-	-	-	-	-	67	55
CY	-	2	3	3	3	-	-	-	-	3
CZ	10	15	5	5	0	-	-	32	30	41
DE	-	-	-	-	3700	-	-	-	-	25
DK	467	468	469	465	448	-	-	-	-	-
EE	98	104	124	126	245	83	85	111	127	196
EL	-	-	-	-	-	-	-	8	19	23
ES	-	403	2305	3110	5152	-	-	-	-	738
FI	459	482	479	498	498	-	-	-	-	-
HR	-	-	-	-	-	-	-	-	2	1
HU	-	50	50	50	50	-	152	152	138	138
IS	-	8	8	8	8	-	-	-	-	-
LU	-	32	72	84	91	-	-	-	-	-
LT	-	-	-	-	-	121	131	184	238	350
MT	-	-	-	-	665	-	-	-	-	168
NL	-	8	10	35	63	-	25	70	69	197
NO	-	-	-	-	26	-	-	-	-	-
PL	117	120	120	118	118	-	-	-	2600	4350
RO	-	-	-	0	0	-	-	-	53	111
SI	-	-	-	24	24	-	-	-	56	53
SK	-	-	-	45	45	-	-	-	-	-

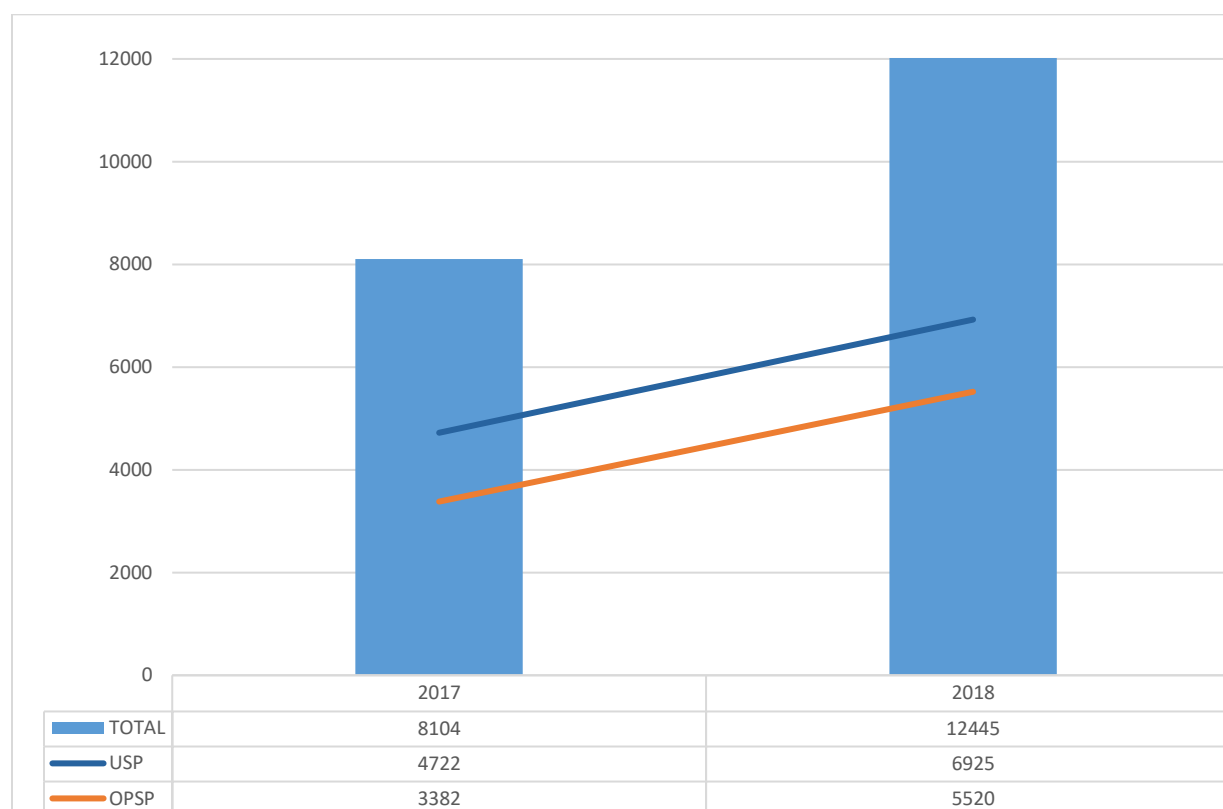
NOTES:

1. FI, IS: Provisional data
2. RO: parcel lockers in t property of OPSP. There are other just renting.

According to the available data, it is possible to observe that for the majority of countries for which there are data, the number of parcel lockers is increasing.

In 2018, the increasing of the number of parcel lockers is particularly relevant in the case of the OPSP, which have witnessed a significant percentage increase in most countries (7 countries present variations superior to 20% in 2018, while in HR there is a reduction of 50%). The most significant increase happened in PL (67%), where there are more 1750 OPSP parcel lockers

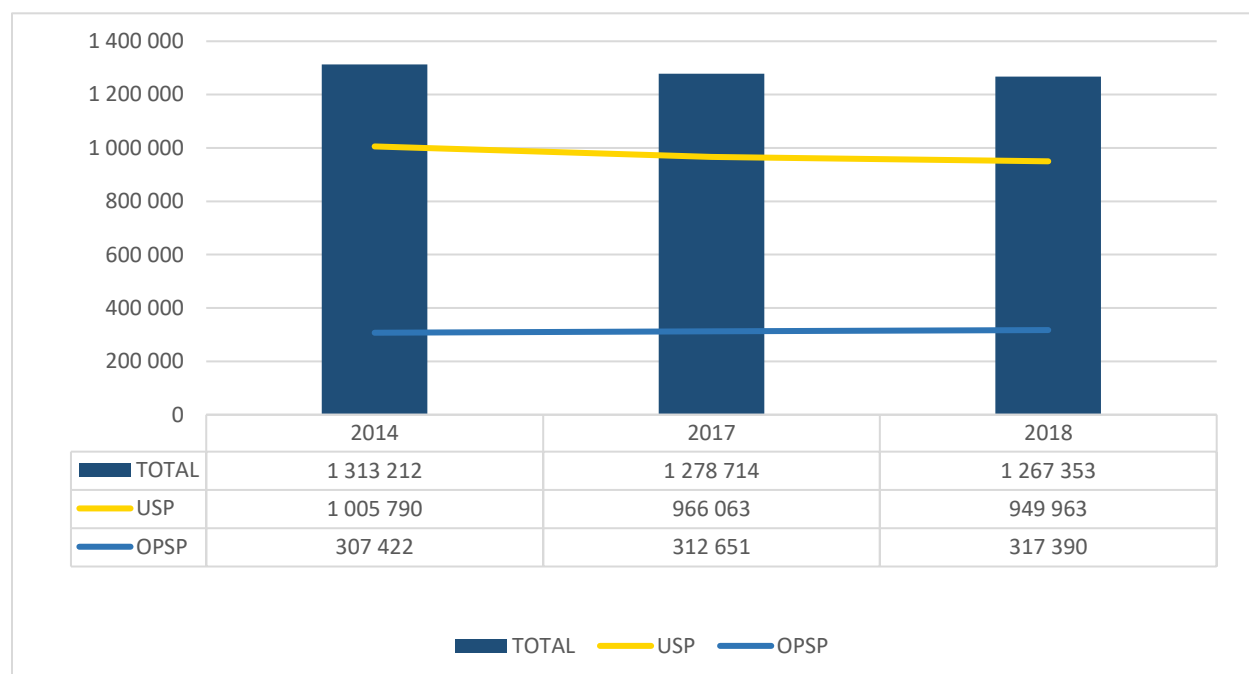
Data on the number of USP parcel lockers also seems to point to an increase in 2018. According to the available data, the following countries had a change in the number of USP parcel locker: increase in LU (8%), BE (19%), ES (66%), NL (80%) and EE (94%) and decreases in CZ (-100%) and DK (-4%).

Figure 65 – Total number of parcel lockers by USP and OPSP: 2017-2018**NOTES:**

1. Data referring only to countries where data is available for 2017 and 2018: BE, CY, CZ, DK, EE, ES, FI, HU, IS, LU, NL, PL SI and SK
2. BE, FI, IS: Provisional data.
3. ES: OPSP data for 2018 not included.

4.5. Employment in the postal sector

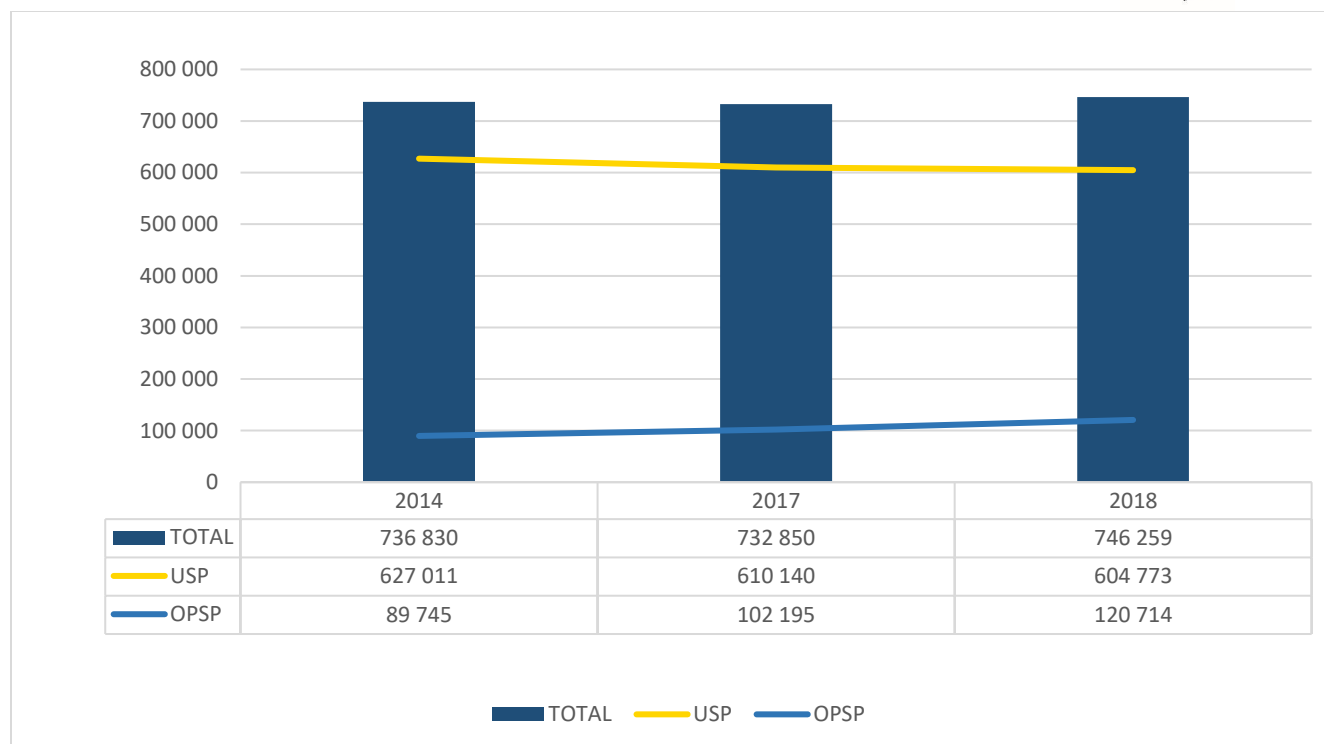
Based on the data provided, total employment dropped approximately 3.5% in the period 2014-2018. As can be seen below the reason of this drop is a gradual decrease of the number of people employed by the USP that has decreased about 5.6% during the same period. Otherwise, the number of people employed by the OPSP slightly rose by around 3.2%. The share of the USP employment on total employment remained stable – 76.6% in 2014 and 75.0% in 2018. As ever in the previous periods in the period 2014-2018 the total number of people employed by the USP still outweighs the number of people employed by the OPSP.

Figure 66– Total employment by USP and other postal service providers (number of people employed): 2014-2018

NOTES:

1. Data referring only to countries where data is available regarding employment both in USP and OPSP – includes data from all the countries with the exception of AT, CH, IE, IS, IT, MT, SE. Contains some estimates according to section on methodology.
2. Where no data is available for 2014, in the total it is used data for the first year for which there is data.
3. BE: Source : National Social Security Office. Only takes into account direct employment, so no subcontractors or temporary workers were taken into account.
CY: Trend break in 2016 due to definition changes in the status of personnel that are considered now as purchase of services and not employees.
DE: Employment data for the reference year 2018 was collected by the FNA for the first time. Data from previous year is not comparable due to different statistical methods from external expertise.
NL: USP: Annual report PostNL: labor force headcount mail in the Netherlands; OPSP: Only mail deliverers (with labor contract); self-employed not included.
LU, MT: confidential data.
PT: Only CTT considered as USP. In previous years reports the entire Grupo CTT was considered as USP.
SK: Without self-employed persons.
UK: Royal Mail UKPIL Headcount numbers reported as average across 52 weeks ending in March of the following year i.e. 2017 figure relates to financial year ending March 2018. Source: Royal Mail Group Annual report, Note 4 to accounts.

Analysing the data about total full time equivalents some countries started to collect this data just in the past few years. Therefore, for the year 2014 it is used data for the first year for which there is data. Regarding this total amount of full-time equivalents in 2018 is 1.3% higher than in 2014, total full-time equivalents by USP decreased by 3.5% and by OPSP increased by 34.5% in the period 2014-2018.

Figure 67– Total Full Time Equivalents by USP and other postal service providers: 2014-2018



NOTES:

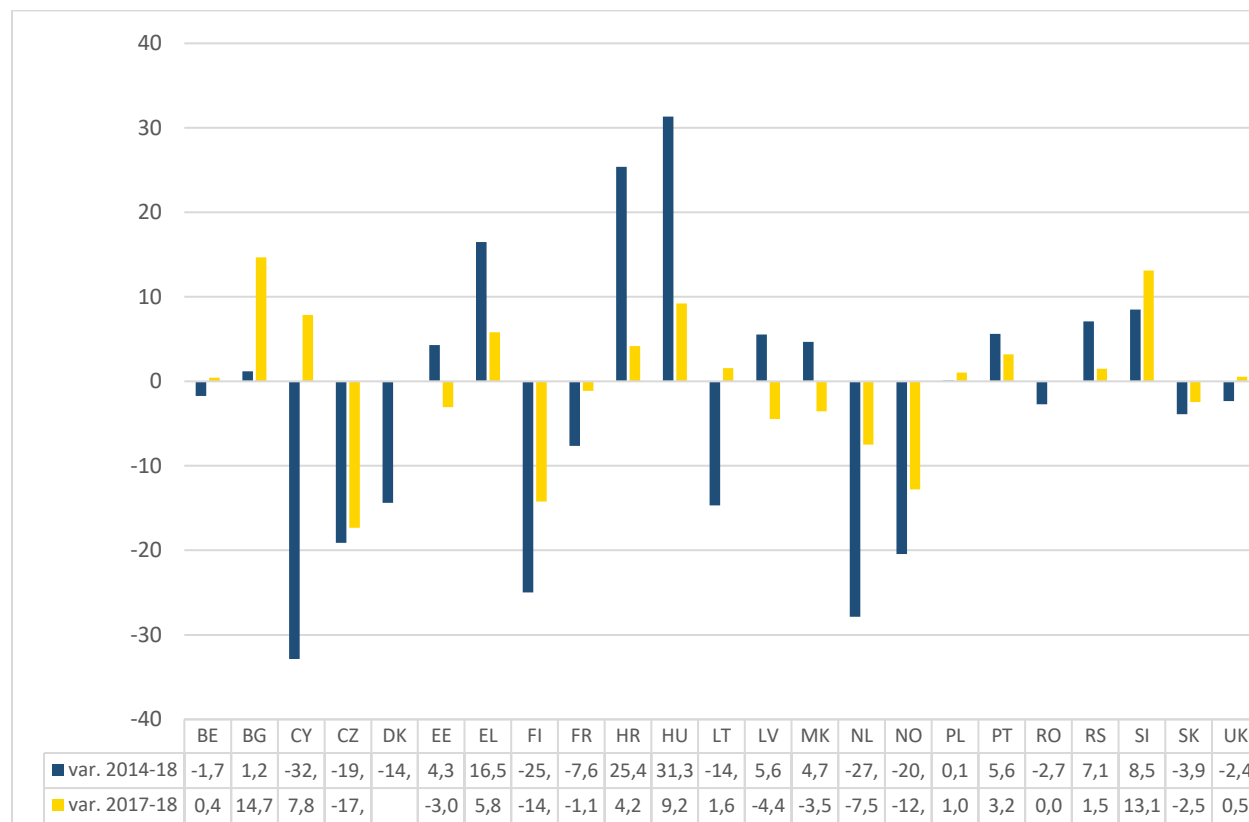
1. Data referring only to countries where data is available regarding full time equivalents both in USP and OPSP – includes data from all the countries with the exception of CY, DE, FI, FR, HR, IE, IS, LV, MK, MT, PT, RS, SE, SI. Contains some estimates according to section on methodology.
2. Where no data is available for 2014, in the total it is used data for the first year for which there is data.
3. BE: Source : National Social Security Office. Only takes into account direct employment, so no subcontractors or temporary workers were taken into account.
 CH: Only employees active in postal services.
 HR: HAKOM do not monitor or collect this data.
 IE: Confidential in USP 2017 Regulatory Accounts.
 LT: RRT collect such information since 2018.
 LU, MT: confidential data.NL: Source: annual reports; PostNL.
 SK: Without self-employed persons.
 UK: USP: Royal Mail UKPIL FTE numbers reported as average across 52 weeks ending in March of the following year. Source: Royal Mail Group Annual report, Note 4 to accounts. OPSP: We do not collect this data.

Looking deeper into the data concerning each country for which there is information available about total employment in the postal sector (USP and OPSP), it can be stated that in the half of the countries there has been a fall in total employment in the postal sector from 2014 to 2018, with the most significant declines observed in CY (-32.8%), FI (-25.0%), NO (-20.4%) and CZ (-19.1%). In CY there was a trend break in 2016 due to definition changes in 2016 in the status of personnel that are considered as purchase of services and not employees, hence the large decrease. In this same period the most noticeable growth in total employment were in HU (31.3%) and HR (25.4%).

Taking a closer look into the evolution between 2017 and 2018, it leads to the conclusion that in most of the countries there wasn't a meaningful change in total employment, with most observable variations staying below 10% in absolute value (positive or negative). The exceptions are CZ (with a fall of 17.3%), FI

(with a fall of 14.2%), NO (with a fall of 12.8%), BG (with a growth of 14.7%) and SI (with a growth of 13.1%).

Figure 68– Total employment variation (%) in 2014-2018 and 2017-2018



NOTES:

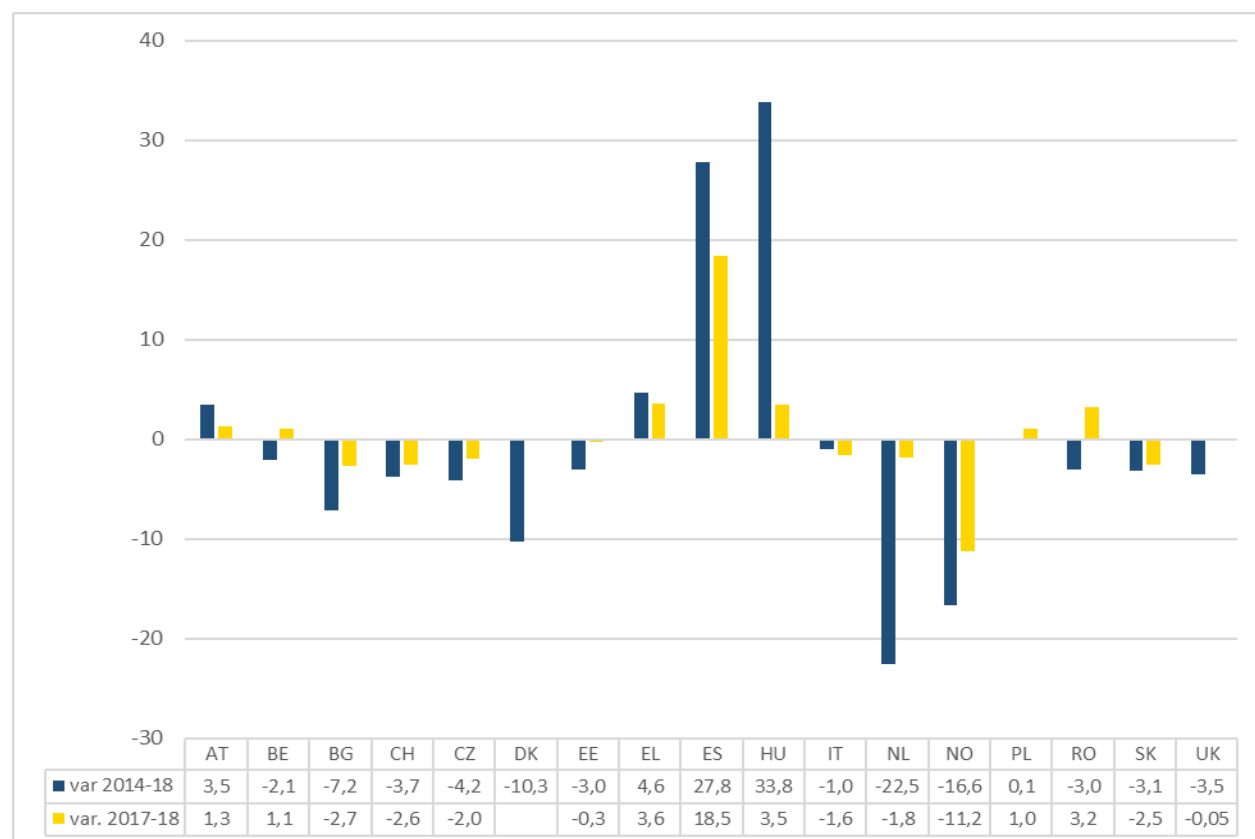
1. Information is shown only from the countries that provided data for total employment and when the data is not confidential.
2. Blank cells represent data not available.
3. In cases where data for 2018 is not available, "variation 2014-2018" represents variation observed until 2017.
4. In cases where no data is available for 2014, "variation 2014-2018" represents variation between 2018 and the first year for which there is data.
5. CY: there was a trend break in 2016, which justifies a large decrease in variation 2014-2018.
6. UK: Figures for UK will relate to USP only. UK do not report on data for the other operators.

As mentioned above there is not much data about total full-time equivalents. According to the data available, it is seen that in most of the countries there weren't significant changes in total full-time equivalents neither between 2014-2018 nor 2017-2018. In 2014-2018 variations are negative (the lowest is in NO 16.6%) except AT, EL, ES, HU and PL. The highest variations are in HU (33.8%) and ES (27.8%). This is because Hungarian NRA asked the postal service providers to pay much more attention to the Parcel Regulation's related paragraphs when completing the questionnaire. In ES the biggest change occurs between 2018 and 2017. This is because in Spain most PSP work based on a network, where franchisors and franchisees work together under such a designation or another (collaborators, branches. Until 2017,

the data on employment referred only to the “leading” firm or the “head” of the network but in year 2018, in an effort to provide a better understanding of the sector, Spanish NRA invited operators to provide the data on employment for the whole network.

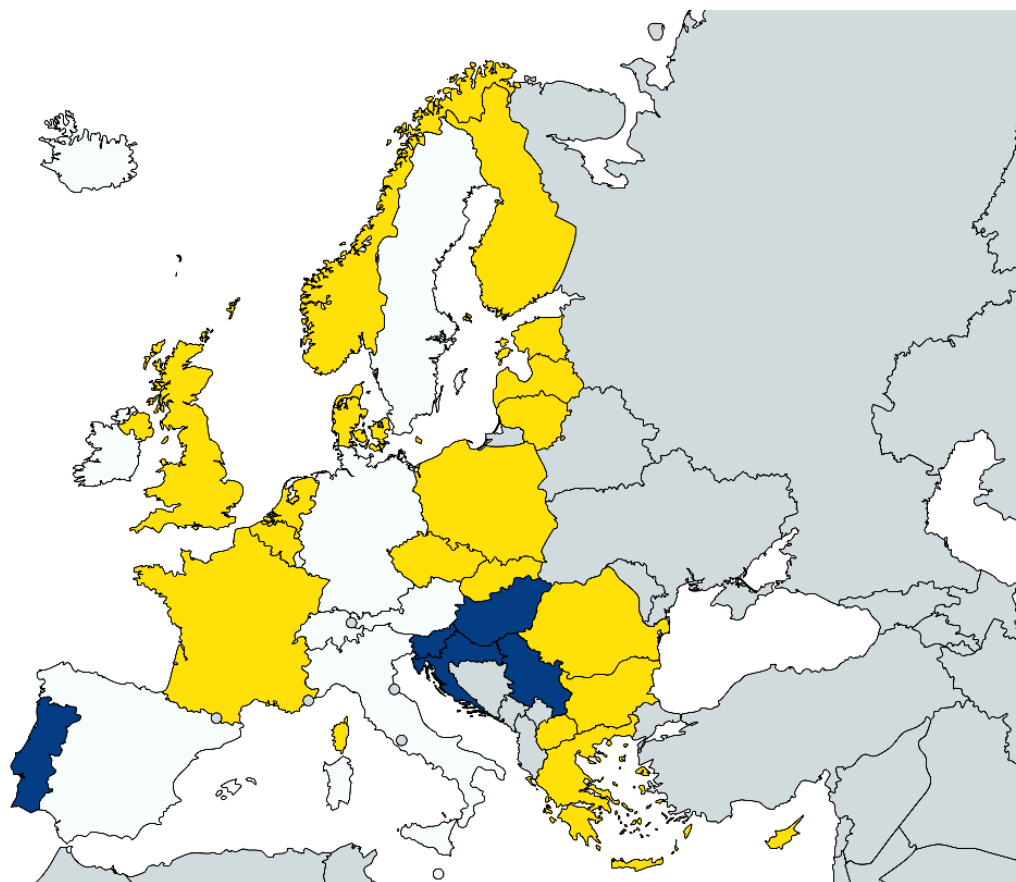
In 2017-2018 the most notable variations stay below 4% in absolute value (positive or negative) except ES with an increase of 18.5% and NO with a decrease of 11.2%.

Figure 69—Total Full Time Equivalents variation (%) in 2014-2018 and 2017-2018



NOTES: 1. Information is shown only from the countries that provided data for total employment and that data is not confidential. 2. In cases where data for 2018 is not available, “variation 2014-2018” represents variation observed until 2017. 3. In cases where no data is available for 2014, “variation 2014-2018” represents variation between 2018 and the first year for which there is data. 4. BG, NL, NO, UK relate to USP only. They do not report on data for the other operators.

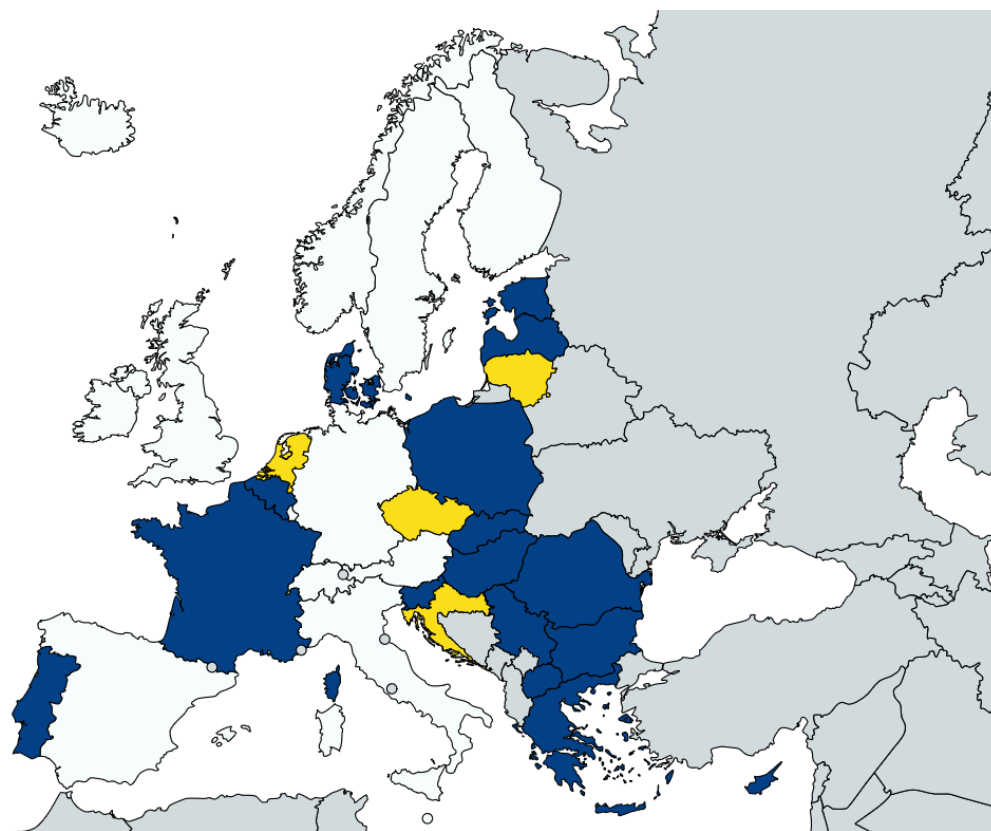
As illustrated in the next figure, the variation in the number of USP employees between 2014 and 2018 in most of the countries is declining.

Figure 70 – Employment variation by the USP: 2014-2018**NOTES:**

1. Data referring only to countries where data is available regarding employment in USP. Contains some estimates according to section on methodology.
2. Dark blue is for the increase, dark yellow – for the decrease, no data available – white.

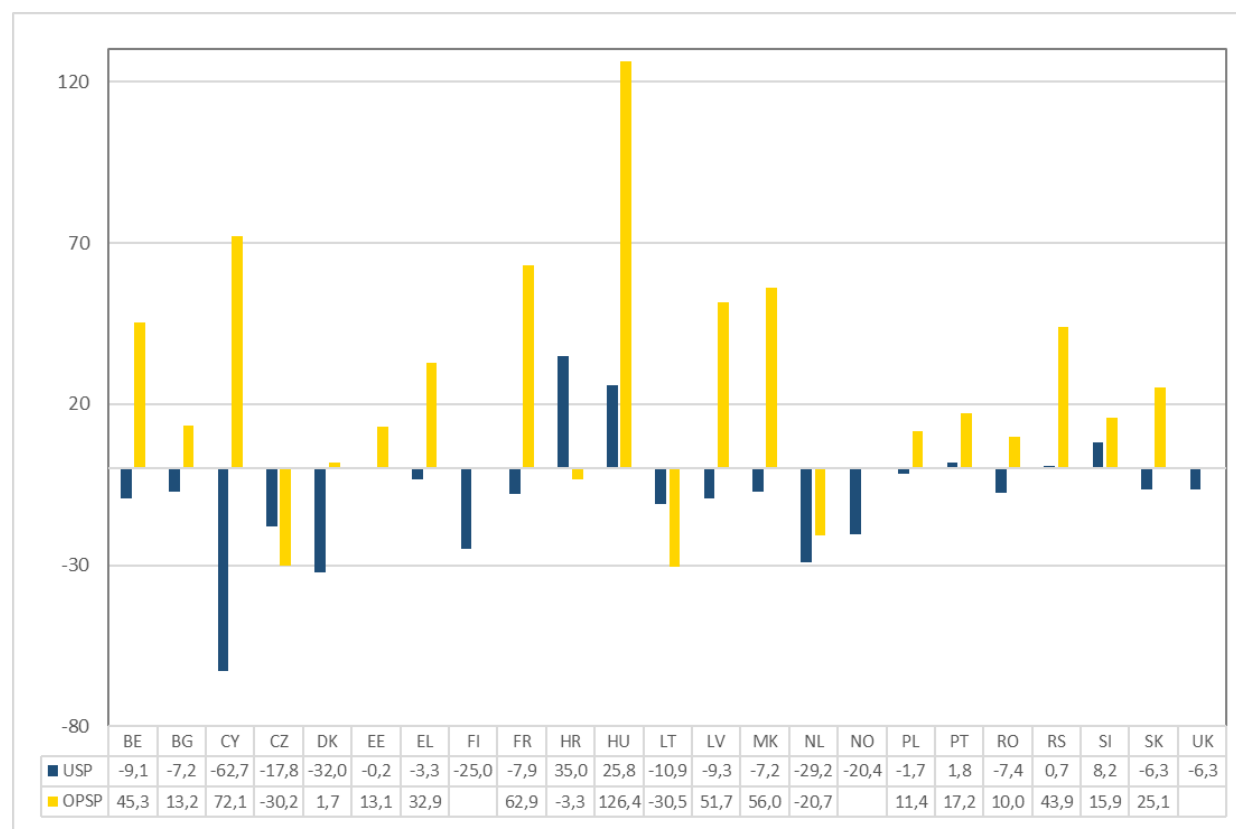
For the countries that observe an increase in terms of the number of employees of the USP, the largest growth is in HR (35.0%). As explained in the previous ERGP Report, regarding the situation observed in HR, in comparison to the last couple of years, the USP has reported data on the number of employees for the year 2017 by applying different allocation methodology on the number of employees, which resulted with the increased number of employees in the area related to carrying out the postal services.

The variation in the number of OPSP employees between 2014 and 2018 is dramatically increasing (the most noticeable increases occurred in HU 126.4%, CY 72.1% and FR 62.9%).

Figure 71 – Employment variation by the OPSP: 2014-2018**NOTES:**

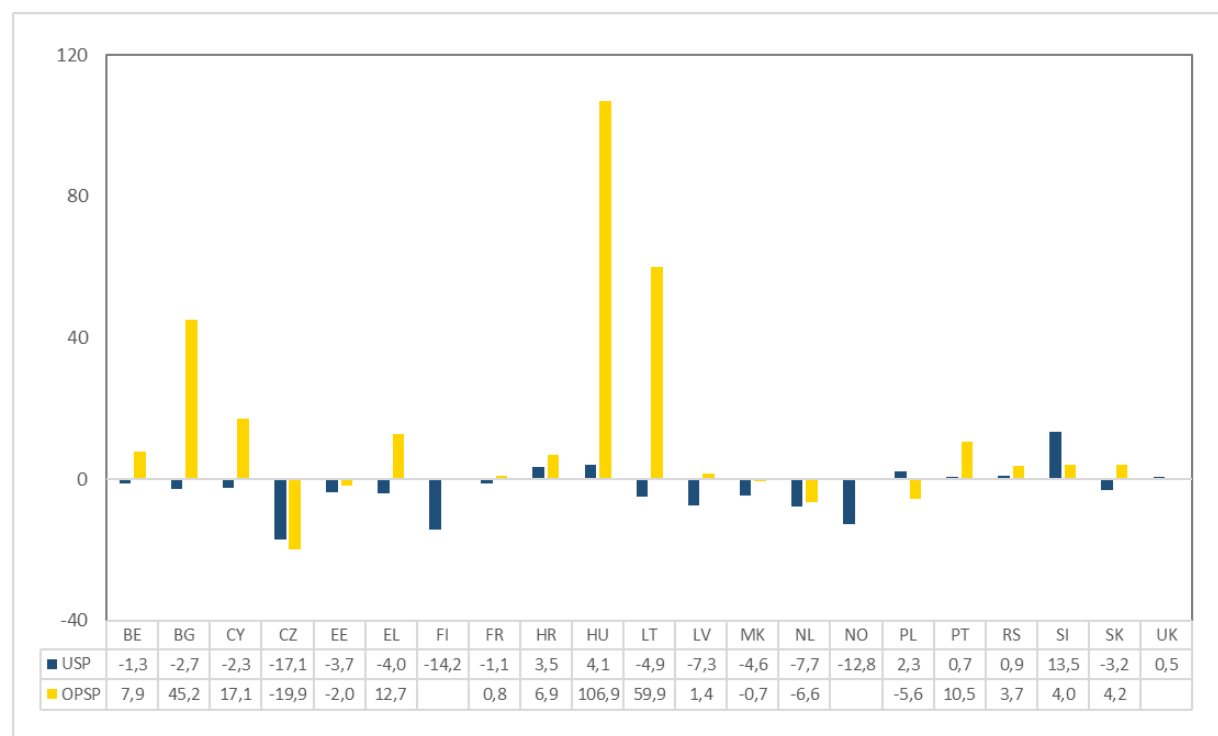
1. Data referring only to countries where data is available regarding employment in USP. Contains some estimates according to section on methodology.
2. Dark blue is for the increase, dark yellow – for the decrease, no data available – white.

As explained earlier, the huge jump in HU is because Hungarian NRA asked the postal service providers to pay much more attention to the Parcel Regulation's related paragraphs when completing the questionnaire. Despite growth in most of the countries there are significant falls in LT (30.5%) and in CZ (30.2%). In LT the fall of OPSP employees was caused by the bankruptcy of one of the largest postal service providers in 2016. In CZ the decrease of the number of employees by the USP has been caused mainly by the decrease of the number of temporary employees and also partially by the decrease of full-time employees. The USP had problems with fluctuation of employees in last years. The decrease by OPSP has been caused by one provider that delivers mostly letters.

Figure 72–Total employment variation (%) by USP and OPSP: 2014-2018**NOTES:**

1. Data referring only to countries where data is available regarding employment both in USP and OPSP. Contains some estimates according to section on methodology.
2. Blank cells represent data not available.
3. In cases where data for 2018 is not available, "variation 2014-2018" represents variation observed until 2017.
4. In cases where no data is available for 2014, "variation 2014-2018" represents variation between 2018 and the first year for which there is data.

Where data is available, the total employment variation by USP in the period 2017-2018 has mostly remained stable, by OPSP it fluctuated. The highest rise by USP was in SI (13,5%), by OPSP – in HU (106,9%) and LT (59,9%). Reasons of such climb in HU was as mentioned above – Hungarian NRA asked the postal service providers to pay much more attention to the Parcel Regulation's related paragraphs when completing the questionnaire. In LT growth trends are driven by significantly increasing number of parcels – OPSP are earning more income from parcels, due to this they are expanding and employing more staff. The most significant falls by USP and by OPSP were in CZ, respectively 17.1% and 19.9%. They were caused by the same reasons as in the period 2014-2018.

Figure 73 – Total employment variation (%) by USP and OPSP: 2017-2018**NOTES:**

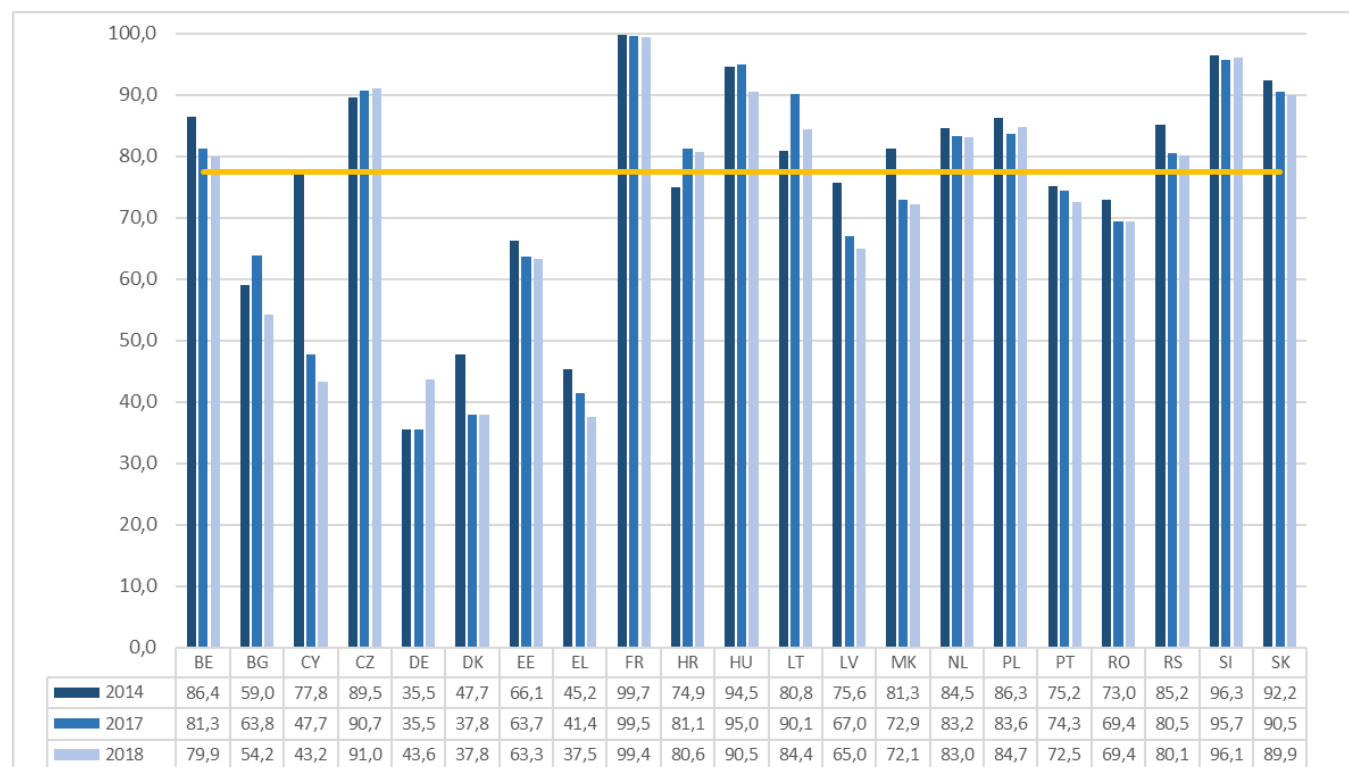
1. Data referring only to countries where data is available regarding employment both in USP and OPSP. Contains some estimates according to section on methodology.
2. Blank cells represent data not available.
3. In cases where data for 2018 is not available, "variation 2014-2018" represents variation observed until 2017.
4. In cases where no data is available for 2014, "variation 2014-2018" represents variation between 2018 and the first year for which there is data.

As is notable in the following figure, the USP continues to have more employees than the OPSP for most of the countries analysed, with no significant changes between the situations in 2014 and in 2018 for most of the countries. In 2018 there were only four countries – CY, DE, DK and EL – where more than a half of all employees were employed by OPSP. Nevertheless, in a minority of countries there have been drops in the share of USP employment from 2014 to 2018 (for example, in CY -34.6 percentage points and in LV -10.6 percentage points), while in some others undistinguished growth has taken place (the most substantial growth was in HR (5.7%)). Even though in some countries there has been, in fact, a rise in the share of USP employment, most countries possessed a fall in the share of USP employment.

The highest share of USP employment on total employment in the postal sector is noticeable in FR, both in 2014 and in 2018 (respectively 99.7% and 99.4%). As referred in the previous ERGP Report, this is because the scope of services do not include express and that the data is only available for the operators that have an individual license granted by the NRA for correspondence, and therefore data should be interpreted with care. On the other hand, the lowest shares of USP employment in 2018 are noticeable in EL (37.5%), DK (37.8%), CY (43.2%), and DE (43.6%).

Considering all the countries for which there is information, on average the share of the USP employment on the total postal employment decreased from 79.9% in 2014 to 77.4% in 2018.

Figure 74 – Share of USP employment on Total postal employment in 2014-2018 (%)

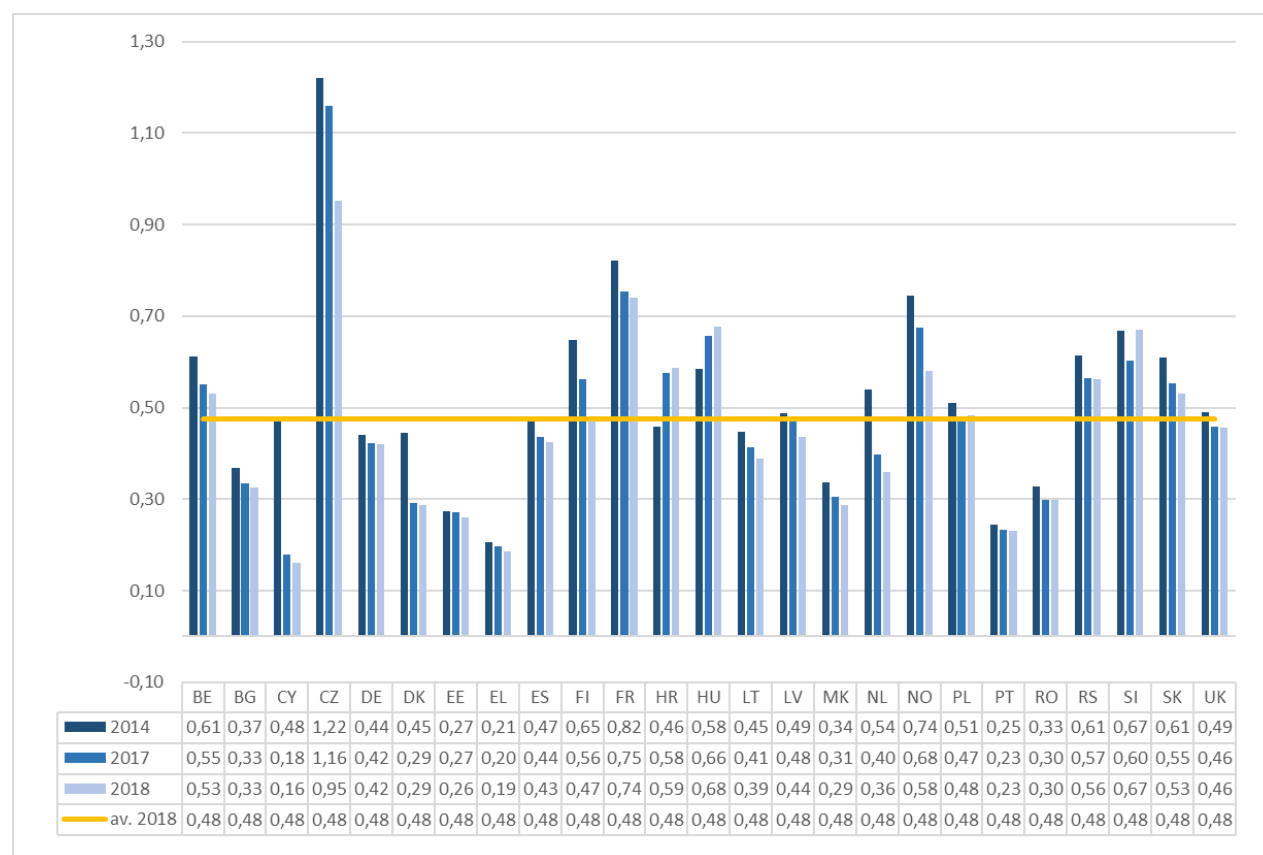


NOTES:

1. Data referring only to countries where data is available regarding employment in USP and OPSP. Contains some estimates according to section on methodology.
2. DE provided data only for 2017.

In most of the countries for which data is available, the proportion of employment within the USP regarding the total country employment has dropped since 2014, as is shown in the chart below. In 2018 in all the countries employment by the USP accounts less than 1% of total country employment, with the highest proportion in CZ 0.95% and the lowest proportion in CY 0.16%. There were only two countries where the share of total employment by the USP increased – it is HR with a growth from 0.46% in 2014 to 0.59% in 2018 and HU with a growth from 0.58% to 0.68% in the same period. It should be noted that the evolution in the share in total employment may be influenced not only by the employment in the postal sector itself, but also by the total employment of the country. Hence, any evolution should be considered as indicative only.

Figure 75– People employed by the USP as a proportion of total employment of the country (%)

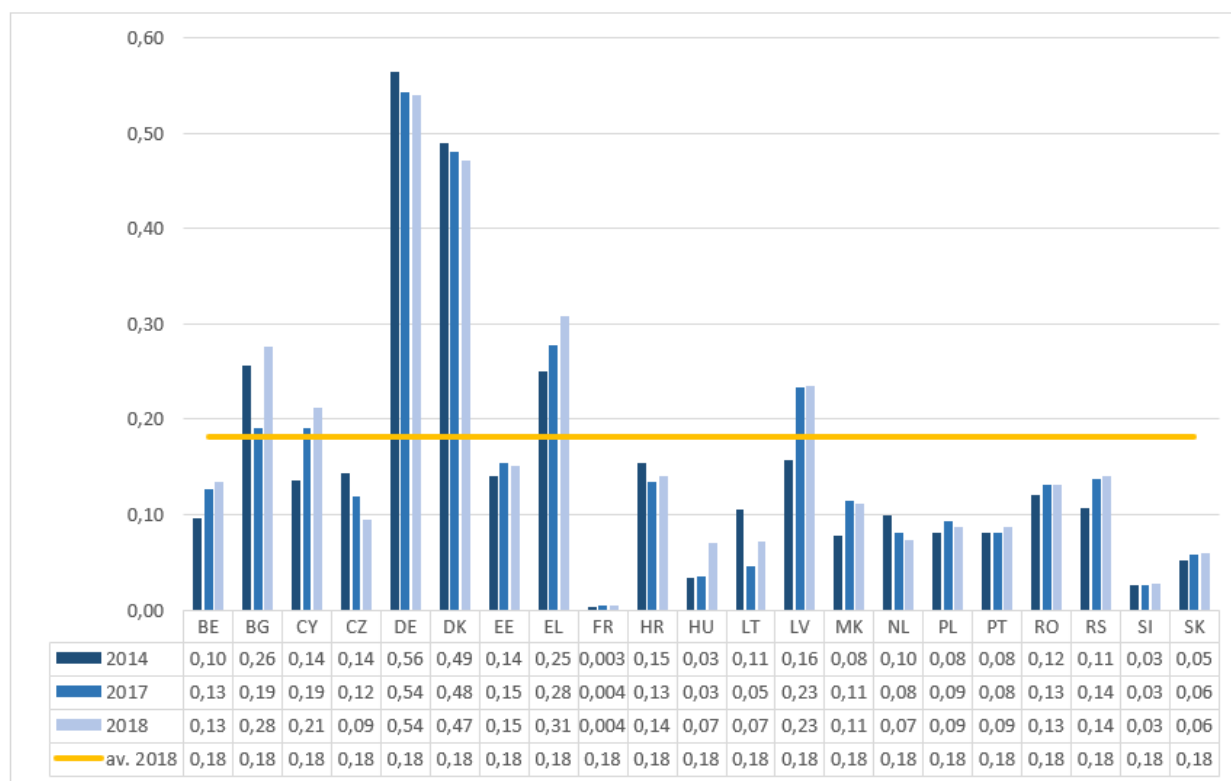


1. NOTES:

Employment data from Eurostat (total employment resident population between 15 and 64 years old). The method of recording employment may differ between NRAs and Eurostat. Data referring only to countries where data is available regarding employment in USP. Contains some estimates according to section on methodology.

Contrary to what is noticeable regarding employment by the US, there is not a clear trend in the evolution of the share of employment by the OPSP on total country employment – while in some countries there has also been a decline, in some others has been a rise. In 2018 the country where the share of OPSP employment in the total employment of the country is highest is DE (0.54%), while the lowest share is noticeable in FR (0.004%). As before, it should be noted that the evolution in the share in total employment may be influenced not only by the employment in the postal sector itself, but also by the total employment of the country. Hence, any evolution should be considered as indicative only.

Figure 76 – People employed by other postal services providers as a proportion of total employment (%)



NOTES:

Employment data from Eurostat (total employment resident population between 15 and 64 years old). The method of recording employment may differ between NRAs and Eurostat. Data referring only to countries where data is available regarding employment in OPSP. Contains some estimates according to section on methodology.

4.6. Investment in the postal sector

In the last years, postal providers are transferring the focus on investment to the parcels, and betting in the automation, on green forms of transport (Sustainability agenda). Given this, the USP and OPSP are investing in the sector, as it can be shown in the figure below. Nevertheless, data about Investment in the postal sector is very limited and few NRAs are collecting this data. The following table presents an overview of total investment by USP and OPSP in the countries who were able to provide this data.

Figure 77 – Total investment by USP and OPSP (thousands, EUR)

COUNTRY	USP						OPSP					
	2014	2015	2016	2017	2018	Var. 2014-18 (%)	2014	2015	2016	2017	2018	Var. 2014-18 (%)
AT*	73 575	99 585	110 571	107 792	126 458	71,9						
BG							3 084	2 056	2 850	648	4 163	35,0
CY					284						1 274	
CZ	10 848	16 183	19 219	19 385	16 131	48,7	3 441	4 984	4 954	4 582	7 305	112,3
ES	64	71	78	79	68	5,6						
FR*	463 000	488 000	601 000	641 000	621 000	34,1						
HR	6 032	8 008	12 751	25 936	27 698	359,2	22 924	24 791	23 285	12 676	17 571	-23,4
IE				19 300	9 400	-51,3****						
IT			381 000	403 000	457 000	19,9***			33 419	35 599	64 607	93,3***
LT					1 229						4 239	
PT	11 999	15 067	18 838	16 890		40,8**	4 110	6 162	5 585	5 677		38,1**
RS	12 035	10 538	3 145	4 628	7 546	-37,3	12 035	5 030	4 747	8 678	4 004	-66,7
UK	412 480	450 694	363 028	310 203	282 105	-31,6						

NOTES:

1. Where no data is available for 2014, the variation presented corresponds to the variation between 2018 and the first year for which there is data.
 2. Where no data is available for 2018, the variation presented corresponds to the variation between 2014 and the last year for which there is data.
 3. Blank cells represent data not available.
 4. * investment is total, not divided by USP and OPSP.
 5. ** variation 2014-2017
 6. *** variation 2016-2018
 7. **** variation 2017-2018
 8. BE, SK: confidential.
- CY: Includes only tangible investment.
 EL: In 2018 142 companies intend to proceed to new investments.
 ES: Correlates total investment. It is not possible to separate investment in postal sector from total investment.
 IE: Source: Note 4. p.41 2017 Regulatory Accounts. The IE USP restated the 2017 data in its published 2017 Regulatory Accounts.

NO: There are numbers on investment in the USP's yearly financial reports, but a major part of the investments is common for the USP's different business segments and cannot be attributed to the postal service activities alone.

PT: Only CTT considered as USP.

UK: Source: Royal Mail Regulatory Financial Statements. Data refers to UKPIL cashflow for Purchase of Property, Plant & Equipment and Purchase of intangible assets (software). Date relates to relevant financial year ending in March. i. e. 2014 = 2014-15, 2015 = 2015-16, 2016 = 2016-17, 2017 = 2017-18.

With reference to the data available, it is remarkable that investment is a very unpredictable and variable indicator. In most of the countries, in the period 2014-2018, investment is increasing by both – USP and OPSP. The highest increase by USP is in HR (359.2%) and the highest increase by OPSP is in CZ (112.3%). In some countries there were decreases. The highest decreases were in RS: by USP (37.3%), by OPSP (66.7%). In IE, in the period 2017-2018, the drop was even higher (51.3).

Furthermore, it is worth mentioning that in most of the countries the total amount of investment in the postal sector by the USP outweighs the amount of investment in the postal sector by the OPSP.

ANNEXES

5. ANNEX 1 – SCOPE OF SERVICES

There is some variation relating to the concept of postal services between countries. Therefore, it is necessary to be cautious when comparing data referring to different countries, in particular regarding the characteristics of the services existing in each country. As such, it is relevant to take into account the existence of differences in terms of (i) which services are included in the definition of postal services; (ii) which services are considered to be within the scope of the universal service; (iii) weight limit of the postal items and (iv) the definition of each of the postal services themselves.

Definition of postal services

The Postal Service Directive states that postal services are “(...) services involving the clearance, sorting, transport and distribution of postal items”. A postal item is defined as “(...) an item addressed in the final form in which it is to be carried by a postal service provider. In addition to items of correspondence, such items also include books, catalogues, newspapers, periodicals and postal parcels containing merchandise with or without commercial value”.

In this framework, data was collected on the type of items that are included in the definitions of postal services and postal items in each country, taking into account specifically the following disaggregation: items of correspondence²⁷, printed objects²⁸ (Books, catalogues, newspapers, periodicals), postal parcels²⁹, express mail and unaddressed mail

According to the data collected, there is some variation regarding the type of items that are included in the definitions of postal services and postal items in each country.

The following figures summarize information regarding countries’ data on services that are considered to be within the concept of postal services for all countries that provided information, as well as information regarding the upper weight limits associated to each service. In each figure aggregated information regarding the total number of replies that identified a certain procedure is also identified according to data gathered from the replies to the questionnaire.

Cells marked in grey represent situations where no information was provided.

²⁷ According to the Postal Service Directive, an item of correspondence is “(...) a communication in written form on any kind of physical medium to be conveyed and delivered at the address indicated by the sender on the item itself or on its wrapping. Books, catalogues, newspapers and periodicals shall not be regarded as items of correspondence”.

²⁸ The Postal Service Directive does not provide a specific definition for printed objects/matters, though it excludes books, catalogues, newspapers and periodicals from the scope of correspondence.

²⁹ The Postal Service Directive does not provide a specific definition for postal parcels. Notwithstanding, the more recently approved Regulation (EU) 2018/644, on cross border parcel delivery services defines a parcel as “(...) a postal item containing goods with or without commercial value, other than an item of correspondence, with a weight not exceeding 31,5 kg (...)”.

Figure A. 1. Items of correspondence

- Per country

COUNTRY	Items of correspondence			
	Services included in the definition of postal services		Upper weight limit	
	Including direct mail	Excluding direct mail	Including direct mail	Excluding direct mail
AT	Yes ¹	Not defined		
BE	Yes	No	2 kg	
BG	Yes ²	Yes	2 kg	2 kg
CH	Yes	No	2 kg	
CY	Yes	Yes	2 kg	2 kg
CZ	Not defined ³	Yes		2 kg
DE	Yes	No	2 kg	
DK	Yes	No	2 kg	
EE	Yes	No	No weight limit	
EL	Yes		2 kg	
ES	Yes	Yes	No weight specified	No weight specified
FI				
FR	Yes	No	2 kg	
FYROM	Yes	No		
HR	Yes	No	No weight specified	
HU	Yes	No	2 kg	
IE	No	Yes ⁴		
IS	Yes	No	2 kg	
IT	Yes	Yes	2 kg	2 kg
LT	Yes ⁵	No	5 kg	
LU	Yes		No weight specified	No weight specified
LV	Yes	No	2 kg	
MT	Yes	Yes	2 kg	2 kg
NL	Yes	Yes		
NO				

¹ AT: Direct mail is only an item of correspondence if addressed to a specific addressee.

² BG: Direct mail is included in the scope of non-universal postal services, it is separated as a separate service from items of correspondence since 2010. Direct mail shall not be treated as items of correspondence.

³ CZ: Direct mail is not defined in the Czech postal law.

⁴ IE: 100g Letters; 500g Large Envelope; Packet 2kg

⁵ LT: Neither primary nor secondary legislation sets the upper weight limits for "Item of correspondence". Based on UPU regulations, LT interprets that "item of correspondence" could weight up to 5 kg.

PL	Yes	No	2 kg	
PT	Yes			
RO	Yes	Yes	No weight specified	No weight specified
RS	Yes ⁶	No	2 kg	
SE	Yes	Not defined	2 kg	2 kg
SI	Yes	Yes	2 kg	2 kg
SK	Yes	No	2 kg	
UK	Yes	Yes		

• Totals

	Items of correspondence			
	Services included in the definition of postal services		Upper weight limit	
	Including direct mail	Excluding direct mail	Including direct mail	Excluding direct mail
TOTAL REPLIES	31	28	24	11
Yes	29	11		
No	1	15		
Not defined	1	2		
2 kg			18	7
5 kg			1	0
10 kg			0	0
20 kg			0	0
30 kg			0	0
31.5 kg			0	0
40 kg			0	0
50 kg			0	0
No weight specified			4	3
No weight limit			1	0

⁶ RS: books, periodicals, newspapers are already included in this category.

Figure A. 2. Printed objects (Books, catalogues, newspapers, periodicals)

- Per country

COUNTRY	Printed objects							
	Services included in the definition of postal services				Upper weight limit			
	Books	Catalogues	Newspapers	Periodicals	Books	Catalogues	Newspapers	Periodicals
AT	Yes	Yes	Yes	Yes				
BE	Yes	Yes	Yes	Yes				
BG	Yes	Yes	Yes	Yes	5 kg	5 kg	5 kg	5 kg
CH	Not defined ¹	Not defined ²	Yes	Yes			No weight specified	No weight specified
CY	Yes	Yes	Yes	Yes	2 kg	2 kg	2 kg	2 kg
CZ	Not defined ³	Not defined ⁴	Not defined ⁵	Not defined ⁶				
DE	Yes	Yes	Yes	Yes				
DK	Yes	Yes	Yes	Yes	20 kg	2 kg	2 kg	2 kg
EE	No	Yes	Yes	Yes		No weight limit	No weight limit	No weight limit
EL	Yes	Yes	Yes	Yes	2 kg	2 kg	2 kg	2 kg
ES	Yes	Yes	Yes	Yes	No weight specified	No weight specified	No weight specified	No weight specified
FI								
FR	Yes	Yes	Yes	Yes	No weight limit provided in the legal framework	No weight limit provided in the legal framework	No weight limit provided in the legal framework	No weight limit provided in the legal framework
FYROM	Yes	Yes	Yes	Yes				
HR	Yes	Yes	Yes	Yes	No weight specified	No weight specified	No weight specified	No weight specified
HU	Not defined	Not defined	Not defined	Not defined				
IE	Yes	No	No	No	2 kg / 5 kg ⁷			
IS	Yes	Yes	Yes	Yes	2 kg	2 kg	2 kg	2 kg
IT	Yes	Yes	Yes	Yes	2 kg	2 kg	2 kg	2 kg
LT	No	No	No	No				
LU	Yes	Yes	Yes	Yes	No weight specified	No weight specified	No weight specified	No weight specified
LV	Yes	Yes	Yes	Yes	2 kg	2 kg	2 kg	2 kg

¹ CH: Not separate, it is a parcel until 30kg or letter until 2kg.

² CH: Not separate, it is a parcel until 30kg or letter until 2kg.

³ CZ: There is no special postal service for this content. It could be sent in other items. To/from abroad, it could be sent as M-bag.

⁴ CZ: There is no special postal service for this content. It could be sent in other items. To/from abroad, it could be sent as M-bag.

⁵ CZ: There is no special postal service for this content. It could be sent in other items. To/from abroad, it could be sent as M-bag.

⁶ CZ: There is no special postal service for this content. It could be sent in other items. To/from abroad, it could be sent as M-bag.

⁷ IE: Sent as "packet" - 2kg Inside the State; 5kg Outside the State.

MT	Yes	Yes	Yes	Yes	2 kg	2 kg	2 kg	2 kg
NL	Yes	No	Yes	Yes				
NO								
PL ⁸	Yes	Yes	Yes	Yes	No weight specified	No weight specified	No weight specified	No weight specified
PT	Yes	Yes	Yes	Yes				
RO	Yes	Yes	Yes	Yes	No weight specified	No weight specified	No weight specified	No weight specified
RS	Yes	Yes	Yes	Yes	2 kg	2 kg	2 kg	2 kg
SE	Not defined ⁹	Not defined ¹⁰	Not defined ¹¹	Not defined ¹²	2 kg	2 kg	2 kg	2 kg
SI	Yes ¹³	Yes	Yes	Yes	10 kg	10 kg	10 kg	10 kg
SK	No	No	Yes	Yes			2 kg	2 kg
UK	Not defined	Not defined	Not defined	Not defined				

• Totals

	Printed objects							
	Services included in the definition of postal services	Services included in the definition of postal services	Services included in the definition of postal services	Services included in the definition of postal services	Services included in the definition of postal services	Services included in the definition of postal services	Services included in the definition of postal services	Services included in the definition of postal services
	Books	Books	Books	Books	Books	Books	Books	Books
TOTAL REPLIES	31	31	31	31	16	17	19	19
Yes	23	22	25	25				
No	3	4	2	2				
Not defined	5	5	4	4				
2 kg					8	9	10	10
5 kg					1	1	1	1
10 kg					1	1	1	1
20 kg					1	0	0	0
30 kg					0	0	0	0
31.5 kg					0	0	0	0
40 kg					0	0	0	0
50 kg					0	0	0	0
No weight specified					5	5	6	6

⁸ PL: There is only the definition of a form - "form" is a postal item with written or graphic information, copied by printing or similar techniques, presented on paper or other material used in printing, including books, catalogues, newspapers or periodicals; there are no separate definitions of "books", "catalogues", "newspapers" and "periodicals".

⁹ SE: Yes if contained in an envelope or other kind of wrapping, featuring a postal address.

¹⁰ SE: Yes if contained in an envelope or other kind of wrapping, featuring a postal address.

¹¹ SE: Yes if contained in an envelope or other kind of wrapping, featuring a postal address.

¹² SE: Yes if contained in an envelope or other kind of wrapping, featuring a postal address.

¹³ SI: USO 2 kg.

No weight limit					0	1	1	1
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Figure A. 3. Postal parcels

- Per country

COUNTRY	Postal parcels			
	Services included in the definition of postal services		Upper weight limit	
	Non-express	Express	Non-express	Express
AT ¹⁴	Yes	Yes	31.5 kg	31.5 kg
BE	Yes	Yes	31.5 kg	31.5 kg
BG	Yes	Not defined	20 kg	
CH	Yes	Yes	30 kg	30 kg
CY	Yes	Yes	20 kg	20 kg
CZ	Yes	Yes		
DE	Yes		20 kg	
DK	Yes	No	20 kg	
EE	Yes	Yes	No weight limit	No weight limit
EL	Yes	Yes ¹⁵	20 kg	No weight limit
ES	Yes	Yes	No weight specified	No weight specified
FI				
FR	Yes	No	No weight limit provided in the legal framework	
FYROM	Yes	Yes		
HR	Yes	Yes	No weight specified	No weight specified
HU	Yes ¹⁶	Yes ¹⁷	40 kg	40 kg
IE	Yes	No	20 kg	
IS	Yes	No	20 kg	
IT	Yes	Yes	30 kg	30 kg

¹⁴ AT: There is no differentiation between express and non-express.

¹⁵ This refers to postal providers under General Authorisation (courier).

¹⁶ HU: It applies for US parcel without any value-added service.

¹⁷ HU: EMS items and items handled by postal courier service also counted as express parcel (non-universal parcels).

International EMS service: the international postal service provided by the universal service provider in compliance with the rules pertaining to this service, as laid down in the legislation on the promulgation of the Constitution of the Universal Postal Union.

Postal courier service: a guaranteed delivery time postal service, whereby the postal item is to be delivered within 24 hours of the time of deposit, and the postal service provider undertakes the obligation that the person accepting the postal item shall continuously keep it under his personal supervision until he attempts personal delivery to the addressee in such a manner as to enable the sender to change the addressee or address of the postal item at any time during this period and, in the event of an unsuccessful personal delivery, to take any necessary action.

Otherwise all of the items outside US are counted as express parcel.

LT	Yes	Yes	50 kg	50 kg
LU ¹⁸	Yes	Yes	No weight specified	No weight specified
LV	Yes	No	2 kg	
MT	Yes	Yes	20 kg	20 kg
NL	Yes	No	30 kg	
NO				
PL	Yes	Yes ¹⁹	20 kg	No weight specified
PT	Yes	Yes		
RO	Yes	Yes	50 kg	50 kg
RS	Yes	No	31.5 kg	
SE	Yes	Not defined		
SI	Yes	Yes	30 kg	30 kg
SK	Yes	Yes	10 kg	50 kg
UK	Not defined ²⁰	Not defined ²¹	31.5 kg	31.5 kg

• Totals

	Postal parcels			
	Services included in the definition of postal services		Upper weight limit	
	Non-express	Express	Non-express	Express
TOTAL REPLIES	31	30	26	18
Yes	30	20		
No	0	7		
Not defined	1	3		
2 kg			1	0
5 kg			0	0
10 kg			1	0
20 kg			9	2
30 kg			4	3
31.5 kg			4	3
40 kg			1	1
50 kg			2	3
No weight specified			3	4

¹⁸ LU: There is no distinction between express and non-express.

¹⁹ PL: Formally there is no legal definition of an express postal parcel; there is only definition of a "courier item" that includes both letters and parcels.

²⁰ UK: Definition of parcel considered: "Parcel" means an addressed postal item which can, according to normal operating assumptions, be lifted by a single average individual without mechanical aids and which is not a letter or a large letter. This should not include items weighing more than 31.5kg.

²¹ UK: Definition of parcel considered: "Parcel" means an addressed postal item which can, according to normal operating assumptions, be lifted by a single average individual without mechanical aids and which is not a letter or a large letter. This should not include items weighing more than 31.5kg. "Express and secured services" are considered to involve the conveyance of postal packets and any incidental services of collecting, sorting and delivering those postal packets which have at least one of the following features: i. a guarantee for delivery by a certain time or date; ii. a facility enabling the sender and the recipient to monitor the progress of a postal packet through the postal operator's network, including confirmation of delivery.

	Postal parcels			
	Services included in the definition of postal services		Upper weight limit	
	Non-express	Express	Non-express	Express
No weight limit			1	2

Figure A. 4. Express mail

- Per country

COUNTRY	Express mail	
	Services included in the definition of postal services	Upper weight limit
AT ²²	Yes	
BE	Yes	31.5 kg
BG	Yes	31.5 kg
CH	Yes	2 kg
CY	Yes	2 kg
CZ	Yes	
DE	Yes	2 kg
DK	No	
EE	Yes	No weight limit
EL	Yes	2 kg
ES	Yes	No weight specified
FI		
FR	No	
FYROM	Yes	
HR	Yes	No weight specified
HU	No	
IE	No	
IS	Yes	2 kg
IT	Yes	No weight specified
LT	Yes ²³	5 kg
LU	Not defined	No weight specified
LV	No	
MT	Yes	20 kg
NL	No	
NO		
PL	Yes ²⁴	No weight specified
PT	Yes	
RO	Yes	50 kg
RS	No	No weight limit

²² AT: There is no differentiation between express and non-express.

²³ LT: Neither primary nor secondary legislation set the upper weight limits for "Item of correspondence". Based on UPU regulations, LT interprets that "item of correspondence" could weight up to 5 kg.

²⁴ PL: Defined as courier item.

COUNTRY	Express mail	
	Services included in the definition of postal services	Upper weight limit
SE ²⁵	Not defined	
SI	Yes	50 kg
SK	Yes	50 kg
UK	Yes ²⁶	

- Totals

	Express mail	
	Services included in the definition of postal services	Upper weight limit
TOTAL REPLIES	31	18
Yes	22	
No	7	
Not defined	2	
2 kg		5
5 kg		1
10 kg		0
20 kg		1
30 kg		0
31.5 kg		2
40 kg		0
50 kg		3
No weight specified		5
No weight limit		2

²⁵ SE: There is no definition of express, such items fall under the general letter definition if addressed.

²⁶ UK: "Express and secured services" are considered to involve the conveyance of postal packets and any incidental services of collecting, sorting and delivering those postal packets which have at least one of the following features: i. a guarantee for delivery by a certain time or date; ii. a facility enabling the sender and the recipient to monitor the progress of a postal packet through the postal operator's network, including confirmation of delivery.

Figure A. 5. Unaddressed mail

- Per country

COUNTRY	Unaddressed mail	
	Services included in the definition of postal services	Upper weight limit
AT	No	
BE	No	
BG	Yes	2 kg
CH	No	
CY	Yes	2 kg
CZ	No	
DE	No	
DK	No	
EE	No	
EL	No	
ES	Yes	No weight specified
FI		
FR	No	
FYROM	No	
HR	No	
HU	No	
IE	No	
IS	No	
IT	Yes	2 kg
LT	No	
LU	Not defined	No weight specified
LV	Not defined	
MT	No	
NL	No	
NO		
PL	Yes	No weight specified
PT	No	
RO	No	
RS	No	
SE	No	
SI	No	
SK	No	
UK	No	

- Totals

	Unaddressed mail	
	Services included in the definition of postal services	Upper weight limit
TOTAL REPLIES	31	6
Yes	5	
No	24	
Not defined	2	
2 kg		3
5 kg		0
10 kg		0
20 kg		0
30 kg		0
31.5 kg		0
40 kg		0
50 kg		0
No weight specified		3
No weight limit		0

The following figures presents the postal service definitions applicable in each country, according to the replies to the questionnaires.

Figure A. 6. Postal service definitions – ITEMS OF CORRESPONDENCE AND DIRECT MAIL

COUNTRY	Items of correspondence	Direct mail
AT	Postal item: an item addressed in the final form in which is collected by a postal service provider in Austria. In addition to letter mail items, such items include books, catalogues, newspapers and periodicals as well as postal parcels containing goods with or without commercial value. Letter mail item: a communication in written form on any physical medium which is conveyed and delivered to the address indicated by the sender on the item itself or on its wrapping; books, catalogues, newspapers and periodicals are not considered letter mail items.	Direct mail item: a postal item consisting solely of advertising, marketing or publicity material and, apart from the addressee's name, address and identification number as well as other modifications which do not alter the nature of the message, is an identical message to at least 100 addressees.
BE	Postal item: an item addressed in the final form in which it is to be carried by a postal service provider and weighing up to 31.5 kg. In addition to items of correspondence, such items also include for instance books, catalogues, newspapers, periodicals and postal parcels containing merchandise with or without commercial value.	
BG	Item of correspondence (letter and/or postal card): a postal item which contains a communication in written form on any kind of physical medium to be transported and distributed at the address indicated by the sender on the item itself. Printed matter shall not be treated as items of correspondence.	Direct mail: a postal item consisting solely of advertising, marketing or publicity material and comprising an identical message, except for the addressee's name, address and identifying number.
CH	Definitions specified in the Swiss postal legislation, Art. 2 (Postal Services means the receiving, clearance, sorting, transporting and delivery of postal items (letters up to 2 kg, parcels up to 30 kg, newspapers and periodicals).	Direct mail is an item of correspondence.
CY	According to Law 112(I)/2004, means "a communication in written form on any kind of physical medium to be conveyed and delivered at the address indicated by the sender on the item itself or on its wrapping; books, catalogues, newspapers and periodicals are not regarded as items of correspondence"	According to Law 112(I)/2004, means "a communication of material exclusively in advertising, marketing or advertising and comprising an identical message, except for the name, address and identifying number of the consignee and any other changes that do not alter the substance of the message, which is sent to a significant number of addressees, to be transported and delivered at the address indicated by the sender on the item itself or its packaging. Bills, invoices, financial statements and other non-identical messages shall not be regarded as direct mail. Direct mail items are regarded as items of correspondence"
CZ	There is no specific definition	Direct mail is not defined in the Czech postal law.
DE	- Postal services shall mean the following services provided on a profit oriented basis: - the conveyance of letter post items; - the conveyance of addressed parcels weighing not more than 20kg each; or - the conveyance of books, catalogues, newspapers or magazines, insofar as such conveyance is effected by companies providing postal services according to a) or b) above. - Letter post items shall mean addressed written communications. Catalogues and publications appearing on a recurrent basis such as newspapers and magazines shall not be deemed written communications within the meaning of sentence 1 above. Communications not addressed to an individual by name but bearing solely a collective indication of place of residence or business shall not be deemed addressed within the meaning of sentence 1 above.	

	- Conveyance shall be the collecting, forwarding or delivery of postal items to the addressee. - Commercial provision of postal services shall be the conveyance for other parties, on a long-term basis, of postal items with or without the intention to obtain profits. - Postal items shall be deemed items within the meaning of subpara 1 of this paragraph, also where they are conveyed on a commercial basis. - Having a dominant position in the market shall mean any company deemed as having a dominant position in the market under §22 of the Law against Restraints of Competition.	
DK	Item of correspondence: addressed letters up to 2 kg.	
EE	Item of correspondence: an object or objects which is or are addressed and properly packaged and deposited with a postal service provider for forwarding. For example, letters, publications and small packages are items of correspondence	
EL		
ES	Item of correspondence: a communication in written form on physical support of any nature, to be conveyed and delivered at the address indicated by the sender on the item itself or on its wrapping. Advertising direct, books, catalogs, newspapers and periodicals shall not be the consideration of items of correspondence (Law 43/2010).	
FI		
FR	Item of correspondence: a postal item not exceeding 2 kg and which contains a written communication on a physical medium, excluding books, catalogs, newspapers and periodicals. Postal item is any item intended to be delivered at the address indicated by the sender on the item itself or on its wrapping, including in the form of coded geographical coordinates and presented in the final form in which it is going to be routed.	Direct mail is part of items of correspondence.
FYROM		
HR	Item of correspondence: a communication in written form on any kind of physical medium to be conveyed and delivered at the address indicated by the sender on the item itself or on its wrapping.	
HU	Item of correspondence: a postal item containing individual or personal communication, data or information recorded in writing or on any physical data carrier. Postal item: an item of a maximum weight of 40 kg containing an address on the item itself, on its wrapping or in an attached list, or any item qualifying as a postal item under the relevant legislation. Such postal items may include items of correspondence, official documents, items containing writing for the blind, postal parcels, items containing books, catalogues or press products, as well as any other item the content of which is not excluded from the postal service by the government decree issued by virtue of this Act.	
IE		
IS		
IT		
LT	Item of correspondence: a postal item consisting of a notice inscribed on any physical medium, including small packages, to be dispatched and delivered at the address of the addressee indicated therein. Books, catalogues, newspapers and other periodicals shall not be considered items of correspondence (Postal Law of the Republic of Lithuania).	

	Postal item: shall mean an addressed and ready to be sent item, including items of correspondence, postal parcels, items containing books, catalogues, newspapers and other periodicals, which is to be delivered by a postal service provider.	
LU	Definitions specified in Law of 26 December 2012 regarding postal services	Definitions specified in Law of 26 December 2012 regarding postal services
LV	Letter-post items: letters, postcards, printed matter, small packets, M-bags and secograms.	Direct mail: letter-post items
MT		
NL	Letter: addressed written communication on a physical medium	
NO		
PL	Item of correspondence: a postal item other than a printed form containing information stored on any carrier, including information in embossed type. Postal item: an object bearing the marking of an addressee and an address, submitted for clearance or cleared by the postal operator in order to transport it and deliver to the addressee.	
PT	Item of correspondence: a communication in written form on any kind of physical support, including direct mail (Law no. 17/2012, of 26 April; article 5; number 1a and 2).	Direct mail: an item of correspondence comprising an identical message which is sent to a significant number of addresses, exclusively for advertising, marketing or publicity purposes (Law no. 17/2012, of 26 April; article 5; number 1a and 2)
RO		
RS	Letter mail: includes the postal items containing: correspondence, printed matters, goods and other objects. Books, periodicals, newspapers are already included in this category	
SE	Contained in an envelope or other kind of wrapping, featuring a postal address.	
SI	Item of correspondence: a type of communication in written form on any kind of physical medium to be conveyed and delivered at the address indicated by the sender on the item itself or on its wrapping. Books, catalogues, newspapers and periodicals shall not be regarded as items of correspondence.	
SK		
UK	Relevant letter: a postal packet that is up to no more than 353mm in length, up to no more than 250mm in width, up to no more than 25mm thick and which weighs up to no more than 750g (Definition of relevant letter from Essential Condition 1. Essential Condition 1 applies to relevant postal operators. Not all postal operators are relevant postal operators).	

Figure A. 7. Postal service definitions – PRINTED OBJECTS

COUNTRY	Books	Catalogues	Newspapers	Periodicals
AT				
BE	There is not a precise legal definition of books in the postal law.	There is not a precise legal definition of catalogues in the postal law.	There is not a precise legal definition of newspapers in the postal law. A service of last resort is offered for recognized newspapers which respect specific criteria of the offer of last resort.	There is not a precise legal definition of periodicals in the postal law. A service of last resort is offered for recognized periodicals which respect specific criteria of the offer of last resort.
BG	Printed matter shall be a postal item containing newspapers, periodicals, books, catalogues, reproductions on paper used in printing, with	Printed matter shall be a postal item containing newspapers, periodicals, books, catalogues, reproductions on paper used in printing, with	Printed matter shall be a postal item containing newspapers, periodicals, books, catalogues, reproductions on paper used in printing, with	Printed matter shall be a postal item containing newspapers, periodicals, books, catalogues, reproductions on paper used in printing, with

	the address of the sender and addressee indicated on the item itself.	the address of the sender and addressee indicated on the item itself.	the address of the sender and addressee indicated on the item itself.	the address of the sender and addressee indicated on the item itself.
CH	There is no specific definition.	There is no specific definition.	Definitions specified in the Swiss postal legislation, Art. 2	Definitions specified in the Swiss postal legislation, Art. 2
CY				
CZ				
DE	- Postal services shall mean the following services provided on a profit oriented basis: - the conveyance of letter post items; - the conveyance of addressed parcels weighing not more than 20kg each; or - the conveyance of books, catalogues, newspapers or magazines, insofar as such conveyance is effected by companies providing postal services according to a) or b) above. - Letter post items shall mean addressed written communications. Catalogues and publications appearing on a recurrent basis such as newspapers and magazines shall not be deemed written communications within the meaning of sentence 1 above. Communications not addressed to an individual by name but bearing solely a collective indication of place of residence or business shall not be deemed addressed within the meaning of sentence 1 above. - Conveyance shall be the collecting, forwarding or delivery of postal items to the addressee. - Commercial provision of postal services shall be the conveyance for other parties, on a long-term basis, of postal items with or without the intention to obtain profits. - Postal items shall be deemed items within the meaning of subpara 1 of this paragraph, also where they are conveyed on a commercial basis. - Having a dominant position in the market shall mean any company deemed as having a dominant position in the market under §22 of the Law against Restraints of Competition.			
DK	Addressed parcels up to 20 kg.	Addressed daily, weekly and monthly newspapers and the like, journals and addressed shipments with a uniformly printed content, e.g. catalogues and brochures of up to 2 kg.	Addressed daily, weekly and monthly newspapers and the like, journals and addressed shipments with a uniformly printed content, e.g. catalogues and brochures of up to 2 kg.	Addressed daily, weekly and monthly newspapers and the like, journals and addressed shipments with a uniformly printed content, e.g. catalogues and brochures of up to 2 kg.
EE			A periodical means an addressed publication ordered from the sender and deposited with a postal service provider by the sender for forwarding periodically, with a frequency of at least once a quarter	A periodical means an addressed publication ordered from the sender and deposited with a postal service provider by the sender for forwarding periodically, with a frequency of at least once a quarter
EL				
ES				
FI				
FR	Books, catalogues, newspapers and periodicals are considered as postal items. Postal item is any item intended to be delivered at the address indicated by the sender on the item itself or on its wrapping, including in the form of coded geographical coordinates and presented in the final form in which it is going to be routed.	Books, catalogues, newspapers and periodicals are considered as postal items. Postal item is any item intended to be delivered at the address indicated by the sender on the item itself or on its wrapping, including in the form of coded geographical coordinates and presented in the final form in which it is going to be routed.	Books, catalogues, newspapers and periodicals are considered as postal items. Postal item is any item intended to be delivered at the address indicated by the sender on the item itself or on its wrapping, including in the form of coded geographical coordinates and presented in the final form in which it is going to be routed.	Books, catalogues, newspapers and periodicals are considered as postal items. Postal item is any item intended to be delivered at the address indicated by the sender on the item itself or on its wrapping, including in the form of coded geographical coordinates and presented in the final form in which it is going to be routed.
FYROM				
HR	Printed matter: any postal item containing books and printed material. Printed material shall mean any printed publication published by a publisher daily, occasionally or during a specific period of time (newspapers and magazines).	Printed matter: any postal item containing books and printed material. Printed material shall mean any printed publication published by a publisher daily, occasionally or during a specific period of time (newspapers and magazines).	Printed matter: any postal item containing books and printed material. Printed material shall mean any printed publication published by a publisher daily, occasionally or during a specific period of time (newspapers and magazines).	Printed matter: any postal item containing books and printed material. Printed material shall mean any printed publication published by a publisher daily, occasionally or during a specific period of time (newspapers and magazines).

HU				
IE				
IS				
IT				
LT				
LU	Definitions specified in Law of 26 December 2012 regarding postal services.	Definitions specified in Law of 26 December 2012 regarding postal services.	Definitions specified in Law of 26 December 2012 regarding postal services.	Definitions specified in Law of 26 December 2012 regarding postal services.
LV	Printed papers: publications containing texts and images (such as books, press publications, periodicals, catalogues, brochures) produced using different types of mechanical printing equipment.	Printed papers: publications containing texts and images (such as books, press publications, periodicals, catalogues, brochures) produced using different types of mechanical printing equipment.	Printed papers: publications containing texts and images (such as books, press publications, periodicals, catalogues, brochures) produced using different types of mechanical printing equipment.	Printed papers: publications containing texts and images (such as books, press publications, periodicals, catalogues, brochures) produced using different types of mechanical printing equipment.
MT				
NL				
NO				
PL	There is only the definition of a form - "form" is a postal item with written or graphic information, copied by printing or similar techniques, presented on paper or other material used in printing, including books, catalogues, newspapers or periodicals; there are no separate definitions of "books", "catalogues", "newspapers" and "periodicals".	There is only the definition of a form - "form" is a postal item with written or graphic information, copied by printing or similar techniques, presented on paper or other material used in printing, including books, catalogues, newspapers or periodicals; there are no separate definitions of "books", "catalogues", "newspapers" and "periodicals".	There is only the definition of a form - "form" is a postal item with written or graphic information, copied by printing or similar techniques, presented on paper or other material used in printing, including books, catalogues, newspapers or periodicals; there are no separate definitions of "books", "catalogues", "newspapers" and "periodicals".	There is only the definition of a form - "form" is a postal item with written or graphic information, copied by printing or similar techniques, presented on paper or other material used in printing, including books, catalogues, newspapers or periodicals; there are no separate definitions of "books", "catalogues", "newspapers" and "periodicals".
PT	There is no definition	There is no definition	There is no definition	There is no definition
RO				
RS	Printed matters are postal items containing books, newspapers, periodicals and other printed material of no business communication importance, and which are printed on paper, cardboard or other material.	Printed matters are postal items containing books, newspapers, periodicals and other printed material of no business communication importance, and which are printed on paper, cardboard or other material.	Printed matters are postal items containing books, newspapers, periodicals and other printed material of no business communication importance, and which are printed on paper, cardboard or other material.	Printed matters are postal items containing books, newspapers, periodicals and other printed material of no business communication importance, and which are printed on paper, cardboard or other material.
SE				
SI	Postal item: an item addressed in its final form in which it is to be carried by the postal service provider. Such items shall also include, for instance, books, catalogues, newspapers, periodicals and postal packages containing merchandise with or without commercial value.	Postal item: an item addressed in its final form in which it is to be carried by the postal service provider. Such items shall also include, for instance, books, catalogues, newspapers, periodicals and postal packages containing merchandise with or without commercial value.	Postal item: an item addressed in its final form in which it is to be carried by the postal service provider. Such items shall also include, for instance, books, catalogues, newspapers, periodicals and postal packages containing merchandise with or without commercial value.	Postal item: an item addressed in its final form in which it is to be carried by the postal service provider. Such items shall also include, for instance, books, catalogues, newspapers, periodicals and postal packages containing merchandise with or without commercial value.
SK				
UK				

Figure A. 8. Postal service definitions – POSTAL PARCELS

COUNTRY	Postal parcels - non-express	Postal parcels - express
AT		

BE	There is not a precise legal definition of parcels in the postal law. There is, however, a BIPT communication regarding the characteristics of parcels of 11 July 2007.	There is not a precise legal definition of parcels in the postal law. There is, however, a BIPT communication regarding the characteristics of parcels of 11 July 2007. Based on this communication an upper limit of 30kg for parcels was defined. Everything above this limit is considered transport.
BG	Postal parcel: a postal item of standard dimensions and weight, usually containing merchandise with or without commercial value.	There is no specific definition in the Postal services Act.
CH	Definitions specified in the Swiss postal legislation, Art. 2	Definitions specified in the Swiss postal legislation, Art. 2
CY		
CZ	There is no specific definition.	Express delivery service: a service which, in addition to providing faster and more reliable collection and delivery of postal items, is characterized by the fact that it is provided as a service having some or all of the following characteristics: guarantee of delivery by a fixed date, collection from point of origin, personal delivery to addressee, possibility of changing the destination and address in transit, confirmation to sender of receipt of the item dispatched, tracking of items dispatched, personal customer service and the provision of services to meet the customer's requirements, if needed.
DE	- Postal services shall mean the following services provided on a profit oriented basis: a. the conveyance of letter post items; b. the conveyance of addressed parcels weighing not more than 20kg each; or c. the conveyance of books, catalogues, newspapers or magazines, insofar as such conveyance is effected by companies providing postal services according to a) or b) above. - Letter post items shall mean addressed written communications. Catalogues and publications appearing on a recurrent basis such as newspapers and magazines shall not be deemed written communications within the meaning of sentence 1 above. Communications not addressed to an individual by name but bearing solely a collective indication of place of residence or business shall not be deemed addressed within the meaning of sentence 1 above. - Conveyance shall be the collecting, forwarding or delivery of postal items to the addressee. - Commercial provision of postal services shall be the conveyance for other parties, on a long-term basis, of postal items with or without the intention to obtain profits. - Postal items shall be deemed items within the meaning of subpara 1 of this paragraph, also where they are conveyed on a commercial basis. - Having a dominant position in the market shall mean any company deemed as having a dominant position in the market under §22 of the Law against Restraints of Competition.	
DK		
EE	Postal parcel: an object or objects which is or are addressed and properly packaged and deposited with a postal service provider for forwarding.	Express services: items of correspondence and postal parcels issued to the addressee or a representative of the addressee against signature or on the basis of other means of identification; items of correspondence and postal parcels forwarded by courier with the aim of expeditious and reliable delivery; items of correspondence and postal parcels in the case of which the sender has the possibility to obtain information concerning the location of the postal item at any time during the journey of the item, to intervene in the delivery of the postal item and also to re-organise the forwarding of the item as necessary
EL		
ES		
FI		

FR	Postal parcels: parcels which are collected, sorted, transported and delivered through regular delivery rounds.	There is no legal definition of express parcels. Taking into account the definition of postal parcels, it can be considered that express parcels are those which are not delivered through regular delivery rounds.
FYROM		
HR	Parcel: any postal item that contains goods and articles.	
HU	Postal parcel: a registered postal item containing goods with or without commercial value.	Express postal service: a guaranteed delivery time service, whereby the postal service provider delivers (or attempts to deliver) the postal item within the country no later than on the working day following the date of deposit, to European Union Member States no later than on the third working day following the date of deposit, or to any other international destinations within the fifth working day following the date of deposit, while providing at least one of the services listed in points a)-f) hereunder: a) traceable handling; b) cash on delivery; c) return receipt; d) insurance; e) delivery exclusively to the hands of the person designated as the addressee of the item; f) acceptance of the item at the sender's place of residence or abode, registered office, premises or branch office. Guaranteed delivery time service: the obligation undertaken by the postal service provider to guarantee the delivery of a postal item within the specified period of time or at a specific point in time. Traceable handling: the technology applied by the postal service provider, in the course of which the postal service provider gives information at least on the place and date of the acceptance of the postal item, the date of its delivery, the grounds for eligibility for takeover, or, in the case of unsuccessful delivery, on the further handling of the postal item on the basis of the unique identification mark of the postal item, as information retrievable from the internet or as a documented text message conveyed using the electronic communication network.
IE		
IS		
IT		
LT	Postal parcel: a postal item of up to 50 kg containing an article (articles) or merchandise with or without commercial value (Postal Law).	Postal parcel: a postal item of up to 50 kg containing an article (articles) or merchandise with or without commercial value (Postal Law).
LU	Definitions specified in Law of 26 December 2012 regarding postal services.	Definitions specified in Law of 26 December 2012 regarding postal services.
LV	Postal parcel: a postal item, in which goods and items with or without commercial value are sent.	
MT		
NL	Parcel: addressed packaged postal item, containing matters not being letters (legal) Domestic and outbound: ≤ 20kg; inbound: ≤ 30kg	
NO		
PL	Postal parcel: a recorded postal item other than a letter item, weighing up to 20,000 g and dimensions: a) of which none may exceed 2000 mm or b) which may not exceed 3000 mm for the sum of length and the largest perimeter measured in a different direction than length.	Courier item: a letter item which is a recorded item or a postal parcel cleared, sorted, transported and delivered in a manner that collectively guarantees: a) direct collection of a postal item from the sender, b) tracking a postal item from posting to delivery, c) delivery of a postal item within a guaranteed time limit specified in the regulations for the provision of postal services or in contracts for the provision of postal services, d) delivery of a postal item directly to the addressee or to a person authorized to collect it, e) obtaining an acknowledgement of receipt of a postal item in a written or electronic form.
PT	Postal parcel: A package containing merchandise or objects with or without commercial value (Law no. 17/2012, of 26 April; article 5; number 1c). An ordinary parcel is defined as a postal parcel that is out of the scope of express mail services.	An express parcel is defined as a postal parcel that lies within the scope of express mail services.

RO		
RS	Parcels: postal items, packed in prescribed manner containing goods and other objects and bearing description of the item content on the item itself or on the accompanying document.	There is no definition of express parcel, only of express items: Express services are postal services with added value including collection, sorting, transport and delivery of recorded express items, within shortest transmission times, both in domestic and international postal traffic.
SE	An addressed item in its final form weighing no more than 20 kg.	
SI	A parcel is a shipment that is recorded at reception and delivery and can have a marked value. A package that has a marked value should be a closed shipment.	
SK		
UK	Parcel: an addressed postal item which can, according to normal operating assumptions, be lifted by a single average individual without mechanical aids and which is not a letter or a large letter. This should not include items weighing more than 31.5kg.	Parcel: an addressed postal item which can, according to normal operating assumptions, be lifted by a single average individual without mechanical aids and which is not a letter or a large letter. This should not include items weighing more than 31.5kg.

Figure A. 9. Postal service definitions – EXPRESS MAIL

COUNTRY	Express mail
AT	
BE	There is no precise legal definition of express mail in the postal law. Express mail is, however, considered a postal service.
BG	Express mail service: a postal service of a value added by comparison with the universal postal service. Express mail service guarantees faster and more reliable clearance, transport and distribution of items and is furthermore characterized by the provision of some or all of the following supplementary services: (a) collection from the sender's address; (b) (Amended, SG No. 37/2006) guarantee of distribution by a given date; (c) possibility of a change of destination and addressee in transit; (d) confirmation to the sender of delivery; (e) tracking and tracing of items; (f) personalised treatment for users and offer of an "à la carte" service, according to requirements as to manner and time ("on call" and "by contract").
CH	There is no definition.
CY	According to Law 112(I)/2004, means "a service featuring, in addition to greater speed and reliability in the collection, distribution, and delivery of items, all or some of the following supplementary facilities: guarantee of delivery by a fixed date; collection from point of origin; personal delivery to addressee; possibility of changing the destination and address in transit; confirmation to sender of receipt of the item dispatched; monitoring and tracking of items dispatched; personalised service for customers and provision of an à la carte service, as and when required. The said service may be provided at a higher price"
CZ	an express delivery service means a service which, in addition to providing faster and more reliable collection and delivery of postal items, is characterised by the fact that it is provided as a service having some or all of the following characteristics: guarantee of delivery by a fixed date, collection from point of origin, personal delivery to addressee, possibility of changing the destination and address in transit, confirmation to sender of receipt of the item dispatched, tracking of items dispatched, personal customer service and the provision of services to meet the customer's requirements, if needed.
DE	- Postal services shall mean the following services provided on a profit oriented basis: a. the conveyance of letter post items; b. the conveyance of addressed parcels weighing not more than 20kg each; or c. the conveyance of books, catalogues, newspapers or magazines, insofar as such conveyance is effected by companies providing postal services according to a) or b) above. - Letter post items shall mean addressed written communications. Catalogues and publications appearing on a recurrent basis such as newspapers and magazines shall not be deemed written communications within the meaning of sentence 1 above. Communications not addressed to an individual by name but bearing solely a collective indication of place of residence or business shall not be deemed addressed within the meaning of sentence 1 above. - Conveyance shall be the collecting, forwarding or delivery of postal items to the addressee. - Commercial provision of postal services shall be the conveyance for other parties, on a long-term basis, of postal items with or without the intention to obtain profits. - Postal items shall be deemed items within the meaning of subpara 1 of this paragraph, also where they are conveyed on a commercial basis. - Having a dominant position in the market shall mean any company deemed as having a dominant position in the market under §22 of the Law against Restraints of Competition.
DK	
EE	Express services: Items of correspondence and postal parcels issued to the addressee or a representative of the addressee against signature or on the basis of other means of identification; items of correspondence and postal parcels forwarded by courier with the aim of expeditious and reliable delivery; items of correspondence and postal parcels in the case of which the sender has the

	possibility to obtain information concerning the location of the postal item at any time during the journey of the item, to intervene in the delivery of the postal item and also to re-organise the forwarding of the item as necessary.
EL	
ES	
FI	
FR	There is no legal definition of express mail. Taking into account the definition of postal mail (mail collected, sorted, transported and delivered through regular delivery rounds), express mail can be considered as mail which is not delivered through regular delivery rounds.
FYROM	
HR	
HU	Express postal service: a guaranteed delivery time service, whereby the postal service provider delivers (or attempts to deliver) the postal item within the country no later than on the working day following the date of deposit, to European Union Member States no later than on the third working day following the date of deposit, or to any other international destinations within the fifth working day following the date of deposit, while providing at least one of the services listed in points a)-f) hereunder: a) traceable handling; b) cash on delivery; c) return receipt; d) insurance; e) delivery exclusively to the hands of the person designated as the addressee of the item; f) acceptance of the item at the sender's place of residence or abode, registered office, premises or branch office. Guaranteed delivery time service: the obligation undertaken by the postal service provider to guarantee the delivery of a postal item within the specified period of time or at a specific point in time. Traceable handling: the technology applied by the postal service provider, in the course of which the postal service provider gives information at least on the place and date of the acceptance of the postal item, the date of its delivery, the grounds for eligibility for takeover, or, in the case of unsuccessful delivery, on the further handling of the postal item on the basis of the unique identification mark of the postal item, as information retrievable from the internet or as a documented text message conveyed using the electronic communication network.
IE	
IS	
IT	
LT	
LU	Definitions specified in Law of 26 December 2012 regarding postal services.
LV	
MT	
NL	
NO	
PL	Courier item: a letter item which is a recorded item or a postal parcel cleared, sorted, transported and delivered in a manner that collectively guarantees: a) direct collection of a postal item from the sender, b) tracking a postal item from posting to delivery, c) delivery of a postal item within a guaranteed time limit specified in the regulations for the provision of postal services or in contracts for the provision of postal services, d) delivery of a postal item directly to the addressee or to a person authorized to collect it, e) obtaining an acknowledgement of receipt of a postal item in a written or electronic form.
PT	Express mail services: added value services, characterized by the clearance, sorting, transport and distribution of postal items with an increased promptness, differing from regular postal services for a set of additional characteristics, such as: a) Predefined delivery deadlines; b) Registered postal items; c) Guarantee of provider liability, by means of insurance through which the sender is previously aware of how he may be compensated of damages suffered; d) Tracking and tracing of postal items along the provider's operational circuit, allowing the identification of the delivery status and the provision of information to the customer (Law no. 17/2012, of 26 April; article 12; number 2).
RO	
RS	There is no definition of express mail, only express items: Express services are postal services with added value including collection, sorting, transport and delivery of recorded express items, within shortest transmission times, both in domestic and international postal traffic.
SE	
SI	
SK	
UK	Express and secured services: services involving the conveyance of postal packets and any incidental services of collecting, sorting and delivering those postal packets which have at least one of the following features: i. a guarantee for delivery by a certain time or date; ii. a facility enabling the sender and the recipient to monitor the progress of a postal packet through the postal operator's

	network, including confirmation of delivery (Definition of relevant letter from Essential Condition 1). “Express and secured services” are not “relevant postal services” for the purposes of Essential Condition 1 but may still form part of the wider postal market.
--	---

Figure A. 10. Postal service definitions – UNADDRESSED MAIL

COUNTRY	Unaddressed mail
AT	
BE	
BG	There is no definition in the Postal services Act.
CH	There is no definition.
CY	
CZ	
DE	
DK	
EE	
EL	
ES	
FI	
FR	There is no legal definition.
FYROM	
HR	
HU	
IE	
IS	
IT	
LT	
LU	Definitions specified in Law of 26 December 2012 regarding postal services.
LV	
MT	
NL	
NO	
PL	Non-addressed printed form: written or graphic information, copied by printing or similar techniques, presented on paper or other material used in printing, including books, catalogues, newspapers or periodicals, without indication of an addressee and an address.
PT	
RO	
RS	
SE	
SI	Routing of an item not addressed or an item that is not addressed with a full statement of the name of the addressee but only with a partial address, such as postal area, place, street (with unaddressed advertising, marketing and other mail)
SK	
UK	

The following figures identifies whether the postal service definitions applicable in each country and presented before are based on legal or regulatory decisions, according to the replies to the questionnaires.

Figure A. 11. Postal service definitions – UNADDRESSED MAIL

COUNTRY	Items of correspondence (including direct mail)	Items of correspondence (excluding direct mail)	Books	Catalogues	Newspapers	Periodicals	Postal parcels - non-express	Postal parcels - express	Express mail	Unaddressed mail
AT	Legal						Weight limit is a "regulatory", historically grown definition	Weight limit is a "regulatory", historically grown definition		
BE										
BG	Legal	Legal	Legal	Legal	Legal	Legal	Legal		Legal	
CH	Legal	Legal			Legal	Legal	Legal			
CY	Legal	Legal	Legal	Legal	Legal	Legal	Legal	Legal	Legal	Legal
CZ								Legal	Legal	
DE	Legal		Legal	Legal	Legal	Legal	Legal		Legal	
DK	Legal		Legal	Legal	Legal	Legal	Legal			
EE	Legal				Legal	Legal	Legal	Legal	Legal	
EL										
ES	Legal									
FI										
FR	Legal		Legal				Legal			
FYROM	Legal		Legal	Legal	Legal	Legal	Regulatory	Regulatory	Regulatory	
HR	Legal		Legal				Legal			
HU	Legal		This item is not a postal service in HU.	This item is not a postal service in HU.	This item is not a postal service in HU.	This item is not a postal service in HU.	Legal	Legal	This item is not a postal service in HU.	This item is not a postal service in HU.
IE		Legal	Legal				Legal			
IS										
IT	Legal	Legal	Legal	Legal	Legal	Legal	Legal	Legal		Legal
LT	Legal						Legal	Legal	Legal	

LU	Legal	Legal	Legal	Legal	Legal	Legal	Legal	Legal	Legal	Legal
LV	Legal		Legal	Legal	Legal	Legal	Legal			
MT	Legal	Legal	Legal	Legal	Legal	Legal	Legal	Regulatory	Regulatory	
NL	Legal	Legal	Legal	Legal	Legal	Legal	Legal	Legal	Legal	Legal
NO										
PL	Legal						Legal	Legal	Legal	Legal
PT										
RO	Legal	Legal	Legal	Legal	Legal	Legal	Legal	Legal	Legal	
RS	Legal		Legal	Legal		Legal	Legal	Regulatory	Regulatory	
SE	Legal						Legal			
SI										
SK	Legal				Legal	Legal	Legal	Legal	Legal	
UK	Regulatory	Regulatory					Regulatory	Regulatory	Regulatory	

Services within the scope of the universal service

According to paragraph 1 of Article 3 of the Postal Service Directive, Member States shall ensure that users enjoy the right to a universal service involving the permanent provision of a postal service of specified quality at all points in their territory at affordable prices for all users ensuring, as referred in paragraph 2, the density of the points of contact and of the access points taking into account of the needs of users. The following paragraphs of the referred Article further define the characteristics of such universal service.

The following figures present information regarding services that are considered to be within the concept of universal service for all countries that provided information, as well as information regarding the upper weight limits associated to each service. In each figure aggregated information regarding the total number of replies that identified a certain procedure is also identified according to data gathered from the replies to the questionnaire.

Cells marked in grey represent situations where no information was provided.

Figure A. 12. US - Items of correspondence

- Per country

COUNTRY	In the scope of the US			Upper weight limit		
	Domestic	International Outbound	International Inbound	Domestic	International Outbound	International Inbound
AT	Yes ⁶²	Yes ⁶³	Yes ⁶⁴	2 kg	2 kg	2 kg
BE	Yes	Yes	Yes	2 kg	2 kg	2 kg
BG	Yes	Yes ⁶⁵	Yes	2 kg	2 kg	2 kg
CH	Yes ⁶⁶	Yes	Yes	1 kg	1 kg	1 kg
CY	Yes	Yes	Yes	2 kg	2 kg	2 kg
CZ	Yes	Yes	Yes	2 kg	2 kg	2 kg
DE	Yes	Yes	Yes	2 kg	2 kg	2 kg
DK	Yes	Yes	Yes	2 kg	2 kg	2 kg
EE	Yes	Yes	Yes	2 kg	2 kg	2 kg
EL	Yes	Yes	Yes	2 kg	2 kg	2 kg
ES	Yes	Yes	Yes	2 kg	2 kg	2 kg
FI	Yes	Yes	Yes	2 kg	2 kg	2 kg
FR	Yes	Yes	Yes	2 kg	2 kg	2 kg
FYROM	Yes	Yes	Yes	2 kg	2 kg	2 kg
HR	Yes	Yes	Yes	2 kg	2 kg	2 kg
HU	Yes	Yes	Yes	2 kg	2 kg	2 kg
IE	Yes ⁶⁷	Yes ⁶⁸	Yes ⁶⁹	2 kg	2 kg	2 kg
IS	Yes	Yes	Yes	2 kg	2 kg	2 kg
IT	Yes	Yes	Yes	2 kg	2 kg	2 kg
LT	Yes	Yes	Yes	2 kg	2 kg	2 kg
LU	Yes	Yes	Yes	2 kg	2 kg	2 kg
LV	Yes	Yes	Yes	2 kg	2 kg	2 kg
MT	Yes	Yes	Yes	2 kg	2 kg	2 kg
NL	Yes	Yes	Yes	2 kg	2 kg	2 kg

⁶² AT: Not included in USO if posted in distribution centers.

⁶³ AT: Not included in USO if posted in distribution centers.

⁶⁴ AT: Not included in USO if posted in distribution centers.

⁶⁵ BG: "Cross-border postal items" are items originating from, or destined for, another country. These can be "Priority items", which are transported and distributed by the quickest possible route and "Non-priority items", for which the sender has chosen a lower rate, implying a longer time for transport and distribution.

⁶⁶ CH: Letters USP: Monopoly until 50g.

⁶⁷ IE: Including Letters and Packets.

⁶⁸ IE: Including Letters and Packets.

⁶⁹ IE: Including Letters and Packets.

NO	Yes	Yes	Yes	2 kg	2 kg	2 kg
PL	Yes	Yes	Yes	2 kg	2 kg	2 kg
PT	Yes ⁷⁰	Yes ⁷¹	Yes ⁷²	2 kg	2 kg	2 kg
RO	Yes	Yes	Yes	2 kg	2 kg	2 kg
RS	Yes	Yes	Yes	2 kg	2 kg	2 kg
SE	Yes	Yes	Yes	2 kg	2 kg	2 kg
SI	Yes	Yes	Yes	2 kg	2 kg	2 kg
SK	Yes	Yes	Yes	2 kg	2 kg	2 kg
UK	Yes ⁷³	Yes ⁷⁴	Yes			

• Totals

	In the scope of the US			Upper weight limit		
	Domestic	International Outbound	International Inbound	Domestic	International Outbound	International Inbound
TOTAL REPLIES	33	33	33	32	32	32
Yes	33	33	33			
No	0	0	0			
Not defined	0	0	0			
2 kg				31	31	31
5 kg				0	0	0
10 kg				0	0	0
20 kg				0	0	0
30 kg				0	0	0
31.5 kg				0	0	0
40 kg				0	0	0
50 kg				0	0	0
No weight specified				0	0	0
No weight limit				0	0	0

⁷⁰ PT: Excluding direct mail.

⁷¹ PT: Excluding direct mail.

⁷² PT: Excluding direct mail.

⁷³ UK: There are no Royal Mail letters products above 750g.

⁷⁴ UK: There are no Royal Mail letters products above 750g.

Figure A. 13. US - Printed objects

• Per country

COUNTRY	In the scope of the US												Upper weight limit											
	Books			Catalogues			Newspapers			Periodicals			Books			Catalogues			Newspapers			Periodicals		
	Domestic	International Outbound	International Inbound	Domestic	International Outbound	International Inbound	Domestic	International Outbound	International Inbound	Domestic	International Outbound	International Inbound	Domestic	International Outbound	International Inbound	Domestic	International Outbound	International Inbound	Domestic	International Outbound	International Inbound	Domestic	International Outbound	International Inbound
AT ⁷⁵	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes												
BE	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg
BG	Yes	Yes	Yes	No	No	No	No	No	No	Yes	Yes	Yes	5 kg	5 kg	5 kg	5 kg	5 kg	5 kg	5 kg	5 kg	5 kg	5 kg	5 kg	5 kg
CH	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Yes	Yes	Yes	Yes	Yes	Yes												
CY	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg
CZ	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined												
DE ⁷⁶	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes												
DK	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	20 kg	20 kg	20 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg
EE	No	No	No	No	No	No	No	No	No	No	No	No												
EL	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg
ES	No	No	No	No	No	No	No	No	No	No	No	No	No weight specified	No weight specified	No weight specified	No weight specified	No weight specified	No weight specified	No weight specified	No weight specified	No weight specified	No weight specified	No weight specified	No weight specified
FI	No	No	No	No	No	No	No	No	No	No	No	No												
FR	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg
FYROM	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes												
HR	No	No	No	No	No	No	No	No	No	No	No	No												
HU ⁷⁷	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined												
IE	No	Yes	No	No	No	No	No	No	No	No	No	No		5 kg										
IS	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg
IT	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg
LT	No	No	No	No	No	No	No	No	No	No	No	No												
LU	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg
LV	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg
MT	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg
NL	No	Yes	Yes	No	No	No	No	No	No	No	No	No												
NO	No	No	No	No	No	No	No	Yes	Yes	Yes	Yes	Yes							2 kg	2 kg	2 kg	2 kg	2 kg	2 kg
PL	No	No	No	No	No	No	No	No	No	No	No	No												
PT	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg
RO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg
RS	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg

⁷⁵ AT: These items are not included in USO if posted in distribution centers.

⁷⁶ DE: These items are included if delivery is provided by an operator who also delivers letters / parcels up to 20 kg.

⁷⁷ HU: These items are not a specific postal service category and are treated as letters.

SE ⁷⁸	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg
SI	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg	2 kg
SK	No ⁷⁹	No ⁸⁰	No ⁸¹	No ⁸²	No ⁸³	No ⁸⁴	No	No	No	No	No	No												
UK	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined												

• **Totals**

	In the scope of the US												Upper weight limit											
	Books			Catalogues			Newspapers			Periodicals			Books			Catalogues			Newspapers			Periodicals		
	Domestic	International Outbound	International Inbound	Domestic	International Outbound	International Inbound	Domestic	International Outbound	International Inbound	Domestic	International Outbound	International Inbound	Domestic	International Outbound	International Inbound	Domestic	International Outbound	International Inbound	Domestic	International Outbound	International Inbound	Domestic	International Outbound	International Inbound
TOTAL REPLIES	33	33	33	33	33	33	33	33	33	33	33	33	17	18	17	18	18	18	18	18	18	18	18	18
Yes	18	20	19	17	17	17	19	19	19	20	20	20												
No	10	8	9	11	11	11	10	10	10	9	9	9												
Not defined	5	5	5	5	5	5	4	4	4	4	4	4												
2 kg													14	14	14	16	16	16	16	16	16	16	16	16
5 kg													1	2	1	1	1	1	1	1	1	1	1	1
10 kg													0	0	0	0	0	0	0	0	0	0	0	0
20 kg													1	1	1	0	0	0	0	0	0	0	0	0
30 kg													0	0	0	0	0	0	0	0	0	0	0	0
31.5 kg													0	0	0	0	0	0	0	0	0	0	0	0
40 kg													0	0	0	0	0	0	0	0	0	0	0	0
50 kg													0	0	0	0	0	0	0	0	0	0	0	0
No weight specified													1	1	1	1	1	1	1	1	1	1	1	1
No weight limit													0	0	0	0	0	0	0	0	0	0	0	0

⁷⁸ SE: These items are included if contained in an envelope or other kind of wrapping, featuring a postal address.

⁷⁹ SK: Books and catalogues do not have special postal service category or definition. They can be content of letters or parcels

⁸⁰ SK: Books and catalogues do not have special postal service category or definition. They can be content of letters or parcels

⁸¹ SK: Books and catalogues do not have special postal service category or definition. They can be content of letters or parcels

⁸² SK: Books and catalogues do not have special postal service category or definition. They can be content of letters or parcels

⁸³ SK: Books and catalogues do not have special postal service category or definition. They can be content of letters or parcels

⁸⁴ SK: Books and catalogues do not have special postal service category or definition. They can be content of letters or parcels

Figure A. 14. US - Postal parcels

- Per country

COUNTRY	In the scope of the US						Upper weight limit					
	Postal parcels - non-express			Postal parcels - express			Postal parcels - non-express			Postal parcels - express		
	Domestic	International Outbound	International Inbound	Domestic	International Outbound	International Inbound	Domestic	International Outbound	International Inbound	Domestic	International Outbound	International Inbound
AT ⁸⁵	Yes	Yes	Yes	Yes	Yes	Yes	10 kg	10 kg	10 kg	10 kg	10 kg	10 kg
BE	Yes	Yes	Yes	No	No	No	10 kg	10 kg	20 kg			
BG	Yes	Yes	Yes	No	No	No	20 kg	31.5 kg	31.5 kg	31.5 kg	31.5 kg	31.5 kg
CH	Yes	Yes	Yes	No	No	No	20 kg	20 kg	20 kg			
CY	Yes	Yes	Yes	Yes	Yes	Yes	20 kg	20 kg	20 kg	20 kg	20 kg	20 kg
CZ	Yes	Yes	Yes	No	No	No	10 kg	10 kg	20 kg			
DE	Yes	Yes	Yes	No	No	No	20 kg	20 kg	20 kg			
DK	Yes	Yes	Yes	No	No	No	20 kg	20 kg	20 kg			
EE	Yes	Yes	Yes	No	No	No	20 kg	20 kg	20 kg			
EL	Yes	Yes	Yes	No	No	No	20 kg	20 kg	20 kg			
ES	Yes	Yes	Yes	No	No	No	20 kg	20 kg	20 kg	No weight specified	No weight specified	No weight specified
FI	No	Yes	No	No	No	No						
FR	Yes	Yes	Yes	No	No	No	20 kg	20 kg	20 kg			
FYROM	Yes	Yes	Yes	No	No	No	10 kg	20 kg	20 kg			
HR	Yes	Yes	Yes	No	No	No	10 kg	10 kg	20 kg			
HU	Yes	Yes	Yes	No	No	No	20 kg	20 kg	20 kg	40 kg	40 kg	40 kg
IE	Yes	Yes	Yes	No	No	No	10 kg	10 kg	20 kg			
IS	Yes	Yes	Yes	No	No	No	20 kg	20 kg	20 kg			
IT	Yes ⁸⁶	Yes	Yes	No	No	No	20 kg	20 kg	20 kg			
LT	Yes	Yes	Yes	No	No	No	10 kg	10 kg	20 kg ⁸⁷			
LU	Yes	Yes	Yes	Yes	Yes	Yes	10 kg	10 kg	10 kg ⁸⁸	10 kg	10 kg	10 kg ⁸⁹
LV	Yes	Yes	Yes	No	No	No	10 kg	10 kg	20 kg			
MT	Yes	Yes	Yes	No	No	No	20 kg	20 kg	20 kg			
NL	Yes	Yes	Yes	No	No	No	10 kg	20 kg	20 kg			
NO	Yes	Yes	Yes	No	No	No	20 kg	20 kg	20 kg			

⁸⁵ AT: There is no differentiation between express and non-express. Not included in USO if posted in distribution centers.

⁸⁶ IT: Within USO, parcels are up to 20kg, but by Ministerial definition upper weight limit for parcels (in general) are up to 30kg.

⁸⁷ LT: Only for parcels sent within the EU.

⁸⁸ LU: 20 kg if originating from a EU Member State.

⁸⁹ LU: 20 kg if originating from a EU Member State.

PL	Yes	Yes	Yes	No	No	No	10 kg	20 kg	20 kg			
PT	Yes	Yes	Yes	No	No	No	10 kg	10 kg	20 kg			
RO	Yes	Yes	Yes	No	No	No	10 kg	10 kg	20 kg			
RS	Yes	Yes	Yes	No	No	No	10 kg	10 kg	20 kg			
SE	Yes	Yes	Yes	Not defined ⁹⁰	Not defined ⁹¹	Not defined ⁹²	20 kg	20 kg	20 kg			
SI	Yes	Yes ⁹³	Yes	No	No	No	10 kg	10 kg	20 kg			
SK	Yes	Yes	Yes	No	No	No	10 kg	10 kg	20 kg			
UK	Yes	Yes	Yes	Yes	Yes	Yes	20 kg	20 kg ⁹⁴	20 kg ⁹⁵	10 kg	20 kg ⁹⁶	20 kg ⁹⁷

• **Totals**

	In the scope of the US						Upper weight limit					
	Postal parcels - non-express			Postal parcels - express a)			Postal parcels - non-express			Postal parcels - express a)		
	Domestic	International Outbound	International Inbound	Domestic	International Outbound	International Inbound	Domestic	International Outbound	International Inbound	Domestic	International Outbound	International Inbound
TOTAL REPLIES	33	33	33	32	32	32	32	32	32	7	7	7
Yes	32	33	32	4	4	4						
No	1	0	1	28	28	28						
Not defined	0	0	0	1	1	1						
2 kg							0	0	0	0	0	0
5 kg							0	0	0	0	0	0
10 kg							15	12	2	3	2	2
20 kg							17	19	28	1	2	2
30 kg							0	0	0	0	0	0
31.5 kg							0	1	1	1	1	1
40 kg							0	0	0	1	1	1
50 kg							0	0	0	0	0	0
No weight specified							0	0	0	1	1	1
No weight limit							0	0	0	0	0	0

Figure A. 15. US - Express mail

⁹⁰ SE: No definition of express, such items fall under the general parcel definition if addressed.

⁹¹ SE: No definition of express, such items fall under the general parcel definition if addressed

⁹² SE: No definition of express, such items fall under the general parcel definition if addressed.

⁹³ SI: Could be extended up to 20 kg.

⁹⁴ UK: USO weight is up to 20kg. However regulated product is up to 2kg.

⁹⁵ UK: USO weight is up to 20kg. However regulated product is up to 2kg.

⁹⁶ UK: USO weight is up to 20kg. However regulated product is up to 2kg.

⁹⁷ UK: USO weight is up to 20kg. However regulated product is up to 2kg.

- Per country

COUNTRY	In the scope of the US			Upper weight limit		
	Domestic	International Outbound	International Inbound	Domestic	International Outbound	International Inbound
AT ⁹⁸	No	No	No			
BE	No	No	No			
BG	No	No	No	5 kg	5 kg	5 kg
CH	No	No	No			
CY	Yes	Yes	Yes	2 kg	2 kg	2 kg
CZ	No	No	No			
DE	Yes	Yes	Yes	2 kg	2 kg	2 kg
DK	No	No	No			
EE	No	No	No			
EL	No	No	No			
ES	No	No	No	No weight specified	No weight specified	No weight specified
FI	No	No	No			
FR	No	No	No			
FYROM	No	No	No			
HR	No	No	No			
HU	No	No	No			
IE	No	No	No			
IS	No	No	No			
IT	No	No	No			
LT	No	No	No			
LU	Yes	Yes	Yes	No weight specified	No weight specified	No weight specified
LV	No	No	No			
MT	No	No	No			
NL	No	No	No			
NO	No	No	No			
PL	No	No	No			
PT	No	No	No			
RO	No	No	No			
RS	No	No	No			
SE ⁹⁹	Not defined	Not defined	Not defined			
SI	No	No	No			
SK	No	No	No			

⁹⁸ AT: There is no differentiation between express and non-express. Not included in USO if posted in distribution centers.

⁹⁹ SE: No definition of express, such items fall under the general letter definition if addressed.

UK	Yes	Yes	Yes	10 kg	20 kg ¹⁰⁰	20 kg ¹⁰¹
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• **Totals**

	In the scope of the US			Upper weight limit		
	Domestic	International Outbound	International Inbound	Domestic	International Outbound	International Inbound
TOTAL REPLIES	33	33	33	6	6	6
Yes	4	4	4			
No	28	28	28			
Not defined	1	1	1			
2 kg				2	2	2
5 kg				1	1	1
10 kg				1	0	0
20 kg				0	1	1
30 kg				0	0	0
31.5 kg				0	0	0
40 kg				0	0	0
50 kg				0	0	0
No weight specified				2	2	2
No weight limit				0	0	0

¹⁰⁰ UK: USO weight is up to 20kg. However regulated product is up to 2kg.

¹⁰¹ UK: USO weight is up to 20kg. However regulated product is up to 2kg.

Figure A. 16. US - Bulk mail

- Per country

COUNTRY	In the scope of the US			Upper weight limit		
	Domestic	International Outbound	International Inbound	Domestic	International Outbound	International Inbound
AT ¹⁰²	Yes	Yes	Yes	Letters: 2 kg, parcels: 10 kg	Letters: 2 kg, parcels: 10 kg	Letters: 2 kg, parcels: 10 kg
BE	Yes	Yes	Yes	2 kg	2 kg	2 kg
BG	Not defined	Not defined	Not defined			
CH	Not defined	Not defined	Not defined			
CY	Yes	Yes	Yes	2 kg	2 kg	2 kg
CZ	Not defined	Not defined	Not defined			
DE	Yes	Yes	Yes	2 kg	2 kg	2 kg
DK	No	No	No			
EE	No	No	No			
EL	Yes	Yes	Yes	2 kg	2 kg	2 kg
ES	Yes ¹⁰³	Yes	Yes	2 kg	2 kg	2 kg
FI	No	No	No			
FR	Yes	Yes	Yes	2 kg	2 kg	2 kg
FYROM	Yes	Yes	Yes			
HR	No	No	No			
HU	Yes	Yes	Yes	2 kg	2 kg	2 kg
IE ¹⁰⁴	Yes	Yes	Yes	2 kg	2 kg	2 kg
IS	Yes	Yes	Yes	2 kg	2 kg	2 kg
IT	Yes	Yes	Yes	2 kg	2 kg	2 kg
LT	No	No	No			
LU				No weight specified	No weight specified	No weight specified
LV	Yes	Yes	Yes	2 kg	2 kg	2 kg
MT	Yes	Yes	Yes	2 kg	2 kg	2 kg
NL	No	Yes	Yes		Letters: 2 kg, parcels: 20 kg	Letters: 2 kg, parcels: 20 kg
NO	No	No	No			
PL	No	No	No			
PT	Yes	Yes	Yes	2 kg	2 kg	2 kg
RO	No	No	No			
RS	No	No	No			
SE ¹⁰⁵	Yes	Yes	Yes	2 kg	2 kg	2 kg
SI	No	No	No			

¹⁰² AT: Bulk mail is included in scope of USO, however, anything posted in distribution centers is excluded.

¹⁰³ ES: Only correspondence, not direct mail.

¹⁰⁴ IE: Certain bulk mail, including letters and packets.

¹⁰⁵ SE: Bulk mail falls under the general letter definition, just as any other letter.

SK	Yes	Yes	Yes	2 kg	2 kg	2 kg
UK	No	No	No			

• **Totals**

	In the scope of the US			Upper weight limit		
	Domestic	International Outbound	International Inbound	Domestic	International Outbound	International Inbound
TOTAL REPLIES	31	31	31	17	18	18
Yes	17	18	18			
No	11	10	10			
Not defined	3	3	3			
2 kg				16	17	17
5 kg				0	0	0
10 kg				1	1	1
20 kg				0	1	1
30 kg				0	0	0
31.5 kg				0	0	0
40 kg				0	0	0
50 kg				0	0	0
No weight specified				1	1	1
No weight limit				0	0	0

The following figures presents the definition of services considered to be within the scope of the universal service in each country, according to the replies to the questionnaires.

Figure A. 17. Definition of services within the scope of the universal service

COUNTRY	Services within the scope of the universal service
AT	
BE	Definition is provided in article 15 of the postal act: Art. 15. § 1. The universal postal service shall include the following facilities: 1° the clearance, sorting, transport and delivery of postal items up to 2 kg; 2° the clearance, sorting, transport and delivery of postal parcels offered at single-piece rates up to 10 kg; 3° the delivery of postal parcels offered at single-piece rates coming from other Member States up to 20 kg; 4° the services for registered items and insured items. The universal postal service shall include both domestic and cross-border services. As regards items of correspondence, the King may by a decree deliberated in the Council of Ministers restrict the postal universal service to the services provided at single-piece rates, if this is justified by changing user needs or proves to be necessary to avoid that the universal service represents for the universal service provider an unfair burden in the sense of Article 23, § 2. § 2. The management contract referred to in Article 14, § 2 or § 4 can lay down the specific terms and conditions under which the designated universal service provider is to fulfil his universal service obligations. § 3. Postal services and postal items with added value compared to services falling within the scope of the universal service, shall not be part of the universal service. The King may, by a decree deliberated in the Council of Ministers, specify the criteria based on which those services and items with added value can be distinguished from services falling within the scope of the universal service and what minimum requirements the standard services shall meet.
BG	
CH	Definitions specified in the Swiss postal legislation (Art. 14 and ordinance Art. 29)
CY	Definition is provided in Law 112(I)/2004, Art. 119B: The provision of universal postal service shall consist of the minimum bundle of postal services of a defined quality, as described below, and shall be available to all users in Cyprus, at affordable prices, irrespective of their geographic location, and in light of the specific conditions prevailing in Cyprus. The density of post offices and access points corresponds to the needs of users. The minimum and maximum dimensions of postal items which constitute the universal postal service shall be specified from time to time by the Universal Postal Union. The minimum bundle of postal services that constitutes the universal postal service includes: (a) Minimum access points based on the needs of users, geographic specificities and social conditions; (b) at least one delivery, save in exceptional cases or specific geographic conditions, every working day, for at least five days a week, of postal items, including packages weighing up to two and twenty kg respectively, to the residence or premises of every person, or at such identified points or otherwise as the Commissioner may approve from time to time; (c) At least one clearance, save in exceptional cases or specific geographic conditions, every working day for at least five days a week, from each access point, of postal items and packages described in paragraph (a): Provided that any exceptional circumstances or deviations recognized by the Commissioner shall be notified to the European Commission and to all regulatory authorities by the Commissioner; (d) Provision of postal services, consisting in the clearance, sorting, conveyance and distribution of postal items and packages referred to in paragraphs (b) and (c), at affordable and uniform prices throughout the Republic, subject to the provisions of Section 124 of this Law, with the possibility to establish special arrangements by decision of the Commissioner for home delivery of packages; (e) Provision of postal service of registered and insured postal items, at uniform prices throughout the Republic: Universal service shall include both national and cross-border services. Postal services to blind or partially-sighted persons shall be provided free of charge in accordance with the provisions of the Universal Postal Union.
CZ	
DE	
DK	
EE	Services within the scope of the universal service: ordinary, registered and insured letter; registered and insured parcel. Both domestic and cross-border.
EL	
ES	

FI	
FR	
FYROM	
HR	Universal service: a set of postal services of a certain quality which are available at an affordable price to all users of postal services in the entire territory of the Republic of Croatia, regardless of their geographical location.
HU	
IE	
IS	
IT	Provision of determined quality postal service in all points of the national territory at affordable prices.
LT	According to the Article 14 of the Postal Law: "1. The provision of the following universal postal service on the territory of the Republic of Lithuania must be ensured: 1) clearance, sorting, transport and delivery of postal items of up to 2 kg; 2) clearance, sorting, transport and delivery of postal parcels of up to 10 kg; 3) clearance, sorting, transport and delivery of registered and insured postal items; 4) delivery of postal parcels of up to 20 kilograms received from other Member States. 2. The universal postal service referred to in points 1, 2, 3 of paragraph 1 of this Article shall cover the domestic and cross-border postal services. 3. If the universal postal service provider sends postal items in large quantities and is in agreement with the sender on the clearance points of postal items, delivery terms, and other conditions, the postal service which it provides shall not be considered as the universal postal service. Large quantities shall refer to the cases when one sender within one month submits to the universal postal service provider for conveyance 1,000 and more correspondence items, or 250 or more postal parcels. 4. A postal service with added value shall not be attributed to the universal postal service. A postal service with added value shall mean: 1) delivery and clearance of postal items at the time and/or place preferred by the user; 2) confirmation of the handing in of a postal item, the change of the course of delivery of the postal item; 3) a possibility to receive information at any time on the current location of the postal item; 4) another service with added value. "
LU	
LV	
MT	
NL	
NO	
PL	
PT	
RO	
RS	Universal Postal Services represent the set of postal services that are constantly provided throughout the whole territory of the Republic of Serbia, under equal conditions for all users, within the scope of the prescribed quality and at affordable prices. Universal postal service, in domestic and international postal traffic, shall include: 1) collection, transportation and delivery of postal items, including recorded mail, up to two kilograms, as well as letter post items in electronic form, 2) collection, transportation and delivery of parcels up to 10 kg and delivery of international inbound parcels, up to 20kg 3) collection, transportation and delivery of money orders in classic and electronic form, 4) collection, transportation and delivery of cecogrammes, up to seven kilograms.
SE	
SI	
SK	
UK	

6. ANNEX 2 – NRAS' POWERS TO COLLECT DATA

In general, NRAs have the power to collect data on postal services. However, there are some exceptions in each of the services except from the USP on US, where all NRAs have powers. As to parcel lockers, it can be concluded that some NRAs already have powers to collect data. Although there is not much information available at this point. As to the data collection itself, data shows that most NRAs collect data from postal services. The following figures provide an overview of the current practices regarding this matter.

Figure A. 18. NRA's powers to collect data

COUNTRY	From the USP on the US scope	From the USP on non-US	From other OPSP on US	From other OPSP on non-US	Express services	Bulk mail	Parcel lockers
AT	Yes	Yes	Yes	Yes	Yes	Yes	No
BE	Yes	Yes	Yes	Yes	Yes	Yes	Yes
BG	Yes	Yes	Yes	Yes	Yes	Not defined ¹⁰⁶	Yes
CH	Yes	Yes	Yes	Yes	Yes	No	
CY	Yes	Yes	Yes	Yes	Yes	Yes	
CZ	Yes	Yes	Yes	Yes	Yes ¹⁰⁷	Not defined ¹⁰⁸	Yes
DE	Yes	Yes	Yes	Yes	Yes	Yes	Yes
DK	Yes	No	Yes	No	No	Not defined	No
EE	Yes	Yes	Yes	Yes	Yes	Yes	
EL	Yes	Yes	Yes	Yes	Yes	Yes	Yes
ES	Yes	Yes	Yes	Yes	Yes	Yes	
FI	Yes	Yes	Yes	Yes		Yes	
FR	Yes	Yes	Yes ¹⁰⁹	Yes ¹¹⁰	No	Yes ¹¹¹	
FYROM	Yes	Yes	Yes	Yes	Yes	No	
HR	Yes	Yes	Yes	Yes	Yes	No	
HU	Yes	Yes	Yes	Yes	Yes ¹¹²	Yes ¹¹³	
IE	Yes	Yes	Yes	Yes	No	Yes	
IS	Yes	Yes	Yes	Yes	No	Yes	
IT	Yes	Yes	Yes	Yes	Yes	Yes	
LT	Yes	Yes	Yes	Yes	Yes ¹¹⁴	Yes	
LU	Yes	Yes	Yes	Yes	Yes	Yes	Not defined
LV	Yes	Yes	Yes	Yes	Yes	Yes	
MT	Yes	Yes	Yes	Yes	Yes	Yes	

¹⁰⁶ BG: There is no definition in the Postal Services Act.

¹⁰⁷ CZ: If these items are postal, not courier (direct transport without sorting).

¹⁰⁸ CZ: Bulk mail is not a separate service in CZ.

¹⁰⁹ FR: Only regarding postal providers which have an individual licence granted by the NRA.

¹¹⁰ FR: Only regarding postal providers which have an individual licence granted by the NRA.

¹¹¹ FR: Only regarding postal providers which have an individual licence granted by the NRA.

¹¹² HU: This service is counted as non-US.

¹¹³ HU: Bulk mail is counted to US.

¹¹⁴ LT: There is no distinction between express and non-express service providers.

NL	Yes	Yes ¹¹⁵	Not defined	Yes ¹¹⁶	No ¹¹⁷	Yes ¹¹⁸	Yes
NO	Yes	Yes	Yes	Yes	No	Yes	Yes
PL	Yes	Yes	No	Yes	Yes	No	
PT	Yes	Yes	Yes ¹¹⁹	Yes ¹²⁰	Yes	Yes	
RO	Yes	Yes	Yes	Yes	Yes	Yes	Yes
RS	Yes	Yes	No ¹²¹	Yes	Yes	No ¹²²	
SE	Yes	Yes	Yes	Yes	No	Yes	Yes
SI	Yes	Yes	No	Yes	Yes	No	
SK	Yes	Yes	Yes ¹²³	Yes	Yes	Yes	
UK	Yes	Yes	Yes	Yes	Yes	Yes	Yes
TOTAL REPLIES	33	33	33	33	32	33	13
Yes	33	32	29	32	25	24	9
No	0	1	3	1	7	6	3
Not defined	0	0	1	0	0	3	1

Figure A. 19. Collection of data by the NRAs

COUNTRY	From the USP on the US scope	From the USP on non-US	From other OPSP on US	From other OPSP on non-US	Express services	Bulk mail
AT	Yes	Yes	Yes	Yes	Yes	Yes
BE	Yes	Yes	Yes	Yes	Yes	Yes
BG	Yes	Yes	No ¹²⁴	Yes	Yes	Not defined ¹²⁵
CH	Yes	Yes	Yes	Yes	Yes	No
CY	Yes	Yes	Yes	Yes	Yes	Yes
CZ	Yes	Yes	Yes	Yes	Yes ¹²⁶	Not defined ¹²⁷
DE	Yes	Yes	Yes	Yes	Yes	Yes
DK	Yes	No	Yes	No	No	Not defined
EE	Yes	Yes	Yes	Yes	Yes	Yes
EL	Yes	Yes	Yes	Yes	Yes	Yes
ES	Yes	Yes	Yes	Yes	Yes	Yes
FI	Yes	Yes	No	Yes		Yes
FR	Yes	Yes	Yes ¹²⁸	Yes ¹²⁹	No	Yes ¹³⁰
FYROM	Yes	Yes	Yes	Yes	Yes	No
HR	Yes	Yes	Yes	Yes	Yes	No
HU	Yes	Yes	Yes	Yes	Yes ¹³¹	Yes ¹³²

¹¹⁵ NL: The NRA can require from any (natural or legal) person, the data and information that it needs to properly execute the duties with which it is charged by or pursuant to the Postal Act. It follows that ACM is not entitled to require information or data that cannot be related to any duties under the Postal Act.

¹¹⁶ NL: The NRA can require from any (natural or legal) person, the data and information that it needs to properly execute the duties with which it is charged by or pursuant to the Postal Act. It follows that ACM is not entitled to require information or data that cannot be related to any duties under the Postal Act.

¹¹⁷ NL: Express mail is excluded from the definition of postal services.

¹¹⁸ NL: The NRA can require from any (natural or legal) person, the data and information that it needs to properly execute the duties with which it is charged by or pursuant to the Postal Act. It follows that ACM is not entitled to require information or data that cannot be related to any duties under the Postal Act.

¹¹⁹ PT: The NRA has the power to collect data only from authorised or licensed providers.

¹²⁰ PT: The NRA has the power to collect data only from authorised or licensed providers.

¹²¹ RS: There isn't any OPSP on US in the Republic of Serbia yet.

¹²² RS: There is no definition on bulk mail in postal legislation.

¹²³ SK: There are no other operators providing US; they provide only interchangeable services.

¹²⁴ BG: There are no other OPSP on the US scope.

¹²⁵ BG: There is no definition in the Postal services Act.

¹²⁶ CZ: If these items are postal, not courier (direct transport without sorting).

¹²⁷ CZ: Bulk mail is not a separate service in CZ.

¹²⁸ FR: Only regarding postal providers which have an individual licence granted by the NRA.

¹²⁹ FR: Only regarding postal providers which have an individual licence granted by the NRA.

¹³⁰ FR: Only regarding postal providers which have an individual licence granted by the NRA.

¹³¹ HU: This service is counted as non-US.

¹³² HU: Bulk mail is counted to US.

IE	Yes ¹³³	Yes ¹³⁴	No	No	No	Yes ¹³⁵
IS	Yes	Yes			No	Yes
IT	Yes	Yes	Yes	Yes	Yes	Yes
LT	Yes	Yes	Yes	Yes	Yes ¹³⁶	No
LU	Yes	Yes	Yes	Yes	Yes	Yes
LV	Yes	Yes	Yes	Yes	Yes	Yes
MT	Yes	Yes	Yes	Yes	Yes	Yes
NL	Yes	Yes	Not defined	Yes	No	Yes
NO	Yes	No	No	No	No	No
PL	Yes	Yes	No	Yes	Yes	No ¹³⁷
PT	Yes	Yes	Yes	Yes	Yes	Yes
RO	Yes	Yes	Yes	Yes	Yes	Yes
RS	Yes	Yes		Yes	Yes	
SE	Yes	Yes	Yes	Yes	No	Yes
SI	Yes	Yes	No ¹³⁸	Yes	Yes	No
SK	Yes	Yes	Yes	Yes	Yes	Yes
UK	Yes	Yes	Yes	Yes	Yes ¹³⁹	Yes
TOTAL REPLIES	33	33	31	32	32	32
Yes	33	31	24	29	25	22
No	0	2	6	3	7	7
Not defined	0	0	1	0	0	3

¹³³ IE: From the Annual Regulatory Accounts of the USP.

¹³⁴ IE: From the Annual Regulatory Accounts of the USP.

¹³⁵ IE: USP Only and Bulk services within scope of Universal Service only. Taken from the Annual Regulatory Accounts of the USP.

¹³⁶ LT: Express service providers are not distinguished from other postal service providers and fall within the same category as non-US providers.

¹³⁷ PL: Bulk mail is included in the total number of items but not indicated separately.

¹³⁸ SI: Yes on scope but not specifically on US.

¹³⁹ UK: Data collection programme does not make an explicit distinction between 'Express' and non-express services. Same-day services are excluded from data collection programme.

7. ANNEX 3 – Country codes

Figure A. 20. Country codes used in the report

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