



ERGP REPORT ON CORE INDICATORS FOR MONITORING THE EUROPEAN POSTAL MARKET

2nd February 2023

CONTENTS

CONTENTS 2

TABLE OF FIGURES 4

1. EXECUTIVE SUMMARY 8

2. INTRODUCTION 12

3. METHODOLOGY 14

4. CORE INDICATORS 16

4.1. Prices 16

4.1.1. Letter price evolution in Europe 16

4.1.2. Domestic letter prices 18

4.1.3. International letter prices 20

4.1.4. Parcel price evolution in Europe 22

4.1.5. Domestic priority parcel prices 24

4.1.6. International priority parcel prices 25

4.1.7. EC prices sample, minimum, maximum and USP prices for a 1 kg international parcel 27

4.1.8. Conclusions 29

4.2. Market structure 30

4.2.1. Number of active postal service providers 30

4.2.2. Indicators of the level of market concentration 32

4.2.3. USP Market Shares 40

4.2.3.1. USP Volume Market Shares 40

4.2.3.2. USP Revenues Market Shares 43

4.3. Volumes 46

4.3.1. Volume Trends 46

4.3.2. The proportion of postal item volumes 51

4.3.3. Volumes per capita 53



4.4. Revenues	56
4.4.1. Revenue trends	56
4.4.2. The proportion of postal revenue.....	61
4.4.3. Revenue per capita.....	61
4.4.4. Average revenues per item	63
4.5. Postal establishments.....	68
4.5.1. Postal establishments per area	72
4.5.2. Postal establishments per population	73
4.5.3. Letterboxes	76
4.5.4. Post office boxes	77
4.5.5. Parcel Lockers	79
4.6. Employment in the postal sector.....	81
4.7. Investment in the postal sector.....	92
5. ANNEX 1 – SCOPE OF SERVICES	94
4.1 Definition of postal services.....	94
4.2 Services within the scope of the universal service.....	109
6. ANNEX 2 – NRAS’ POWERS TO COLLECT DATA	117
7. ANNEX 3 – Country codes	120

TABLE OF FIGURES

Figure 1 – Average prices of posting a domestic priority letter (20 grams) – euros	16
Figure 2 – Average price for posting a 20 grams international priority letter within Europe – euros	17
Figure 3 – Price of Domestic single-piece Priority Letter (20 gr) in 2017, 2020 and 2021	18
Figure 4 – Price of Domestic Non-Priority single-piece Letter (20 gr) in 2017, 2020 and 2021	19
Figure 5 – Price difference between priority and non-priority domestic letters in 2021 (%).....	20
Figure 6 – Average price for posting an international priority letter of 20 gr within Europe in 2017, 2020 and 2021	21
Figure 7 – The price difference between international priority and domestic priority letters in 2021 (%).....	22
Figure 8 – Average prices of posting a 2 kg domestic parcel provided by the USP/incumbent – euros	23
Figure 9 – Average prices for posting a 2kg international parcel provided by the USP/incumbent to the closest neighbouring country within Europe – euros.....	24
Figure 10 – Price of posting a domestic 2 kg priority parcel in 2017, 2020 and 2021	25
Figure 11 – Price of posting a 2 kg international parcel provided by the USP/incumbent within Europe (cheapest zone) in 2017, 2020 and 2021	26
Figure 12 – The price difference between international priority and domestic priority of 2kg parcels in 2021 (%).....	27
Figure 13 – Prices of a 1kg intra-EU parcel (track-trace) in 2021: USP and minimum price collected by the EC (in euros)	28
Figure 14 – Change in the number of active PSP between 2017 and 2021 (%).....	30
Figure 15 – Active postal service providers	31
Figure 16 – HHI (Volumes and Revenues) for Letter Postal Market 2017 – 2021	32
Figure 17 – HHI (Volumes and Revenues) for Parcel Postal Market 2017 – 2021.....	33
Figure 18 – Number of postal service providers with more than 1% of the Letter postal market....	35



Figure 19 – Number of postal service providers with more than 1% of the Parcel postal market 2017-2021 36

Figure 20 – Number of PSP with more than 1% of the letter post-market (based on volumes), var. 2017-2021 37

Figure 21 – Number of PSP with more than 1% of the postal letter market (based on revenues), var. 2017-2021 38

Figure 22 – Number of PSP with more than 1% of the parcel postal market (based on volumes), var. 2017-2021 38

Figure 23 - Number of PSP with more than 1% of the parcel postal market (based on revenues), var. 2017-2021 39

Figure 24– Number of postal service providers with more than 1% of the Letter postal market in 2021 39

Figure 25 – Number of postal service providers with more than 1% of the Parcel postal market in 2021 40

Figure 26 – USP Volume share for letters..... 41

Figure 27 – USP Volume share for parcels..... 42

Figure 28 – USP Revenue Market Shares for Letters 43

Figure 29 – USP Revenue Market Share for Parcels..... 44

Figure 30: Total Postal Volumes and the percentage change 2020-2021 and 2017-2021 46

Figure 31: Total Postal Volumes 2017, 2020, and 2021 (in millions)..... 47

Figure 32: Total Volumes – percentage change 2017-2021 and 2020-2021..... 49

Figure 33: Total Letter Volumes – percentage change..... 49

Figure 34: Total Parcel Volumes – percentage change 50

Figure 35: Proportion of Parcels in Total Traffic 51

Figure 36: Proportion of Inbound Parcels from Total Parcels 52

Figure 37: Ratio between parcel receivers and senders 53

Figure 38: Total Annual Postal Volumes per capita and the percentage change 2020-2021 and 2017-2021 54



Figure 39: Total Letter Volume per capita	54
Figure 40: Total Parcel Volume per capita	55
Figure 41: Total Postal Revenue and the percentage change between 2017 and 2021	56
Figure 42: Total Postal Revenue 2017, 2020 and 2021	57
Figure 43: Total Revenue – percentage change from 2020 to 2021 and 2017 to 2021	58
Figure 44: Total Letter Revenues – percentage change.	59
Figure 45: Total Parcel Revenue – percentage change.	60
Figure 46: Proportion of Parcels revenue in Total revenue	61
Figure 47: Total Annual Postal revenues per capita and the percentage change between 2017 and 2021	62
Figure 48: Total Letter mail revenues per capita	62
Figure 49: Total parcel revenues per capita	63
Figure 50: Average revenue per item and the percentage change between 2017 and 2021	64
Figure 51: Average revenue per letter item	65
Figure 52: Average revenue per parcel item	66
Figure 53: Ratio between Domestic and Outbound average parcel rate per item	67
Figure 54 – Total number of postal establishments by USP and OPSP: 2017-2021	68
Figure 55 – Percentage change of the USP postal establishments 2017-2021 and 2020-2021	69
Figure 56 – Percentage change of the USP postal establishments 2017-2021	70
Figure 57 – Percentage change of the OPSP postal establishments 2017-2021 and 2020-2021	71
Figure 58 – Percentage change of the OPSP postal establishments 2017-2021	71
Figure 59 – Postal establishments per 100km²: USP only	72
Figure 60 – Postal establishments per 100km²: OPSP	73
Figure 61 – Postal establishments per 10,000 people: USP	74
Figure 62 – Postal establishments per 10,000 people: OPSP	75
Figure 63 – Total number of letterboxes by USP and OPSP: 2017-2021	76



Figure 64 – Percentage change of the USP letterboxes 2017-2021 and 2020-2021 77

Figure 65 – Total number of post office boxes by USP: 2017-2021 78

Figure 66 – Percentage change of the USP post office boxes 2017-2021 and 2020-2021 78

Figure 67 – Parcel lockers from the USP and the other postal service providers – 2017-2021 79

Figure 68 – Total number of parcel lockers by USP and OPSP: 2020-2021 80

Figure 69 – Total employment by USP and other postal service providers (number of people employed): 2017-2021 81

Figure 70– Total Full-Time Equivalents by USP and other postal service providers: 2017-2021 82

Figure 71– Total employment variation (%) in 2017-2021 and 2020-2021 83

Figure 72–Total Full-Time Equivalents variation (%) in 2017-2021 and 2020-2021..... 84

Figure 73 – Employment variation by the USP: 2017-2021 85

Figure 74 – Employment variation by the OPSP: 2017-2021 86

Figure 75–Total employment variation (%) by USP and OPSP: 2017-2021 87

Figure 76 – Total employment variation (%) by USP and OPSP: 2020-2021 87

Figure 77 – Share of USP employment on Total postal employment in 2017-2021 (%)..... 89

Figure 78– People employed by the USP as a proportion of total employment of the country (%) .90

Figure 79 – People employed by other postal services providers as a proportion of total employment (%) 91

Figure 80 – Total investment by USP and OPSP (thousands, EUR)..... 92

1. EXECUTIVE SUMMARY

The European Regulators Group for Postal Services (ERGP) considers it important 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 to ensure that it continues to benefit all users, both consumers and businesses. Furthermore, updating information on market developments is also important to National Regulatory Authorities (NRAs) to allow them to properly perform their regulatory duties, particularly the obligations arising from the Postal Services Directive¹.

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

ERGP has identified specific indicators to monitor market developments in this framework and has collected data on these indicators. This benchmarking exercise aims 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 from 29 countries to a questionnaire requesting data for 2017-2021, complemented with the information provided by the countries in previous ERGP questionnaires². Therefore, the report's conclusions reflect these data, considering the period from 2017 to 2021. However, the data presented in this report may differ from previous years due to the data reviews by NRAs. In particular, differences in the available information (resulting from having more or fewer NRAs replying to the questionnaires) each year strongly influence the information that can be presented.

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

- **Prices**

In 2021, the average European price for posting a domestic priority letter of 20 grams was up by 7.3% compared to 2020 and up by 36.0% compared to 2017. Likewise, the average European price for international priority letters has also increased, +8.2% in 2020 and +28.7% in comparison with 2017. Finally, regarding non-priority mail, prices increased to a similar extent in 2021, +9.6%, and in contrast with 2017, the price increase reached +29.2%.

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 The previous ERGP questionnaire included 31 replies.

As for the previous year, the prices for parcels have decreased by 4.3% on average in 2021 and increased by 1.6% since 2017. For international parcels, the price increased by 0.3% in 2021 and by 5.4% since 2017. The Southern countries show the highest price on average for international parcels, while the Western countries have the highest price for domestic parcels.

- **Market structure**

Compared to 2017, in 2021, the number of active providers on the European scale increased by 1,338 PSPs. However, Italy (IT) registered the highest absolute increase in active PSPs, with 644 (22%).

It is observable that the variations are also significant when looking at the period between 2017 and 2021, with Austria (AT) having a very notable increase of postal service providers with 629% and eleven additional countries showing an increase greater than or equal to 5%: Czech Republic (CZ), Greece (EL), Spain (ES), Finland (FI), France (FR), North Macedonia (MK), Croatia (HR), Italy (IT), Luxembourg (LU), Portugal (PT), Slovenia (SI). On the other hand, another nine countries show a decrease greater or equal to 5%: Bulgaria (BG), Cyprus (CY), Denmark (DK), Hungary (HU), Ireland (IE), Malta (MT), Poland (PL), Serbia (RS), Slovakia (SK).

The Herfindahl-Hirschman index (HHI) analysis shows that the European Letter postal market is highly concentrated in volumes and revenues. On the contrary, the concentration of the Parcel postal market is not as high as in the postal letter market, and it differs for every country.

The number of PSPs with more than 1% of the total postal market reinforces the conclusions regarding the concentration of the postal market in Europe.

There is a correlation between the total number of providers and providers with more than 1% of the market share, but that correlation is not as strong as expected, and there are very diverse country cases at the European level.

Regarding the market share evolution, the USP generally maintains a high market share for letters in terms of volumes (in 2021, it was about 88.6%). On the other hand, the USP market shares regarding parcels are generally lower (around 26%). The same applies to revenues: the USPs' share regarding letters has remained stable at around 89.3%, while parcels have been about 22.1%.

- **Volumes**

Total traffic volume across ERGP countries has fallen, on average, by 3.5% in 2017-2021, which means a loss of around eight (8) billion items. In particular, letter mail volumes decreased on average by 7.1% (13 billion items), while on the other hand, parcels grew on average by 16.0% (approximately 5 billion items).

The volume drop is registered in all regions, especially the Southern section. Similarly, the letter mail drop is noticed in all areas, especially the Eastern and Southern clusters, and the parcels grew across the board, mainly within the Eastern and Southern regions.

- **Revenues**

Looking into revenues, the trends in terms of evolution give a different story. Total revenues increased on average by 6.7% between 2017 and 2021 (an increase of twenty (20) billion euros). The growth is mainly attributed to improving the parcel revenues (+13.0% on average), compensating for letters' loss (-3.5% on average).

The Eastern cluster recorded the highest postal revenue increase between 2017 and 2021. On the other hand, the non-EU areas registered the highest growth for letter mail between 2017 to 2021, and for the parcels, the growth is across the board, mainly in Eastern and Southern countries.

- **Postal network**

Between 2017 and 2021, the total number of postal establishments increased by 34.7%. The increase in establishments was composed of a slight increase in the USP establishments (2.4%) but a jump in OPSP postal establishments (79.9%).

When looking at the distribution of postal establishments according to the area and population, it can be observed that the number of USP postal establishments per 100km² is very heterogeneous amongst ERGP countries. Similarly, this applies to the number of OPSP postal establishments. This also occurs when analysing the ratio of postal establishments per 10 000 people. Based on 2021 data, only in three countries, the number of USP postal establishments per 100km² is higher than 5 (Czech Republic (CZ), Cyprus (CY) and Malta (MT)), while in seven of the countries, the number of OPSP postal establishments is higher than 5 (Belgium (BE), Bulgaria (BG), Czech Republic (CZ), Italy (IT), Malta (MT), Poland (PL) and Slovenia (SI)).

As to parcel lockers, for most countries for which there are data, the number of parcel lockers increased from 2020 to 2021. However, it is noticed that the number of parcel lockers decreased significantly for the USP, while for the OPSP, there was a considerable increase.

- **Employment**

Across all countries that were able to provide data, total employment decreased by approximately 9.4% between 2017 and 2021. This is mainly due to USP employment, which has around reduced by 28.1% during this same period. Additionally, the number of people employed by OPSP decreased by about 18.7%.

The average share of USP employment on the total postal employment decreased from 74.3% in 2017 to 67.5% in 2021. Moreover, the USP continues to have more employees than the OPSP for most of the countries analysed, except Cyprus (CY), Germany (DE), Greece(EL), Spain (ES) and Turkey (TR).

- ***Investment***

In the last years, postal providers focused on investment matters to parcels while also on automation and green forms of transport (Sustainability agenda).

In most countries, for the period 2017-2021, investment is increasing in both USP and OPSP. Furthermore, it is worth mentioning that in most 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 perform their regulatory duties.

In particular, NRAs should ensure compliance with the obligations arising from the Postal Services Directive 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 to perform their regulatory tasks. In this sense, the Postal Services Directive gives NRAs powers to request postal service providers (PSP) information to carry out their functions (Article 22a). It also states that, upon request, NRAs shall provide the European Commission with appropriate and relevant information to carry out its tasks under the Postal Services Directive.

ERGP considers it 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 the consistent application of the regulatory framework for postal services.

Supervising 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 to guarantee the regulatory objectives of protecting end-users and promoting competition.

Considering 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 their 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 data 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.

The report Annexes provide additional information, which should be taken into account when 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 used throughout this report to identify specific countries.

3. METHODOLOGY

A questionnaire requesting data for 2020 and 2021 was sent to all ERGP members and observers NRAs. Replies were received from 29 countries: Austria, Belgium, Bulgaria, Croatia, Cyprus, Czechia, Denmark, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, North Macedonia, Norway, Poland, Portugal, Romania, Serbia, Spain, Slovakia, Slovenia, Sweden and Turkey.

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. Therefore, the report's conclusions reflect the period from 2017 to 2021. Furthermore, all data used is derived from the replies to the questionnaires unless otherwise stated. Considering this, the data presented in this report may differ from previous years due to limitations of the data collection process. In particular, differences in the available information (resulting from having more or fewer NRAs replying to the questionnaires) each year strongly influence the information that can be presented.

NRAs did not collect data specifically for this exercise – the data provided and used in the report are already collected by NRAs and are publicly available⁵. As such, it should be noted that the definitions of some indicators may not be the same for all countries, and any comparisons should consider the countries' specific notes and explanations applicable to each country⁶. Also, to highlight that the NRAs' powers to collect data on the market may affect the detail and the quality of the information provided⁷.

For some indicators, the objective is to identify geographical trends; hence a cluster analysis was made using the following grouping⁸:

- Western countries: AT, BE, DE, DK, FI, FR, IE, LU, NL, SE;
- 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): ME, MK, NO, RS, TR.

In cases where a complete data set was unavailable, estimating some values in a time series was necessary. The estimates were conducted in two ways: when a data point is missing between two years, the mid-point between the years is used for the missing year. When the extreme points data is

⁵ Only public data is included in the report, confidential figures are not presented in an individual form.

⁶ Specific notes regarding each country are presented along the report; information on definitions is presented in an annex to the report.

⁷ A general overview of these powers is presented in an annex to the report.

⁸ 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.

missing, the value used corresponds to the closest year for which a value exists. The latest data available was considered for the countries that didn't yet provide data for 2021.

Whenever necessary, the exchange rates of 2021, as reported by Eurostat, are used for currency conversions of the countries not using the Euro as the national currency.

In this report's volumes and revenues sections, the "average change" refers to the average of the variances between each consecutive year for the five (5) years under study. The following illustrative example clarifies how the average change is calculated.

	Formula	2017	2018	2019	2020	2021
Volumes		1,000	1,500	2,500	3,000	3,500
% variance between years	$\frac{(\text{Current year} - \text{Previous Year})}{\text{Previous Year}}$		$\frac{(1500 - 1000)}{1000} = 50\%$	67%	20%	17%
average % change 2017 – 2021	<i>Average (% variance between years)</i> = <i>Average(50%, 67%, 20%, 17%)</i>	38%				

The market structure section of this report indirectly refers to the state of competition in the European postal market distinguishing between mail and parcel businesses. It is also essential to measure the concentration of the postal market to consider the substantially different nature and history of these market segments.

4. CORE INDICATORS

4.1. Prices

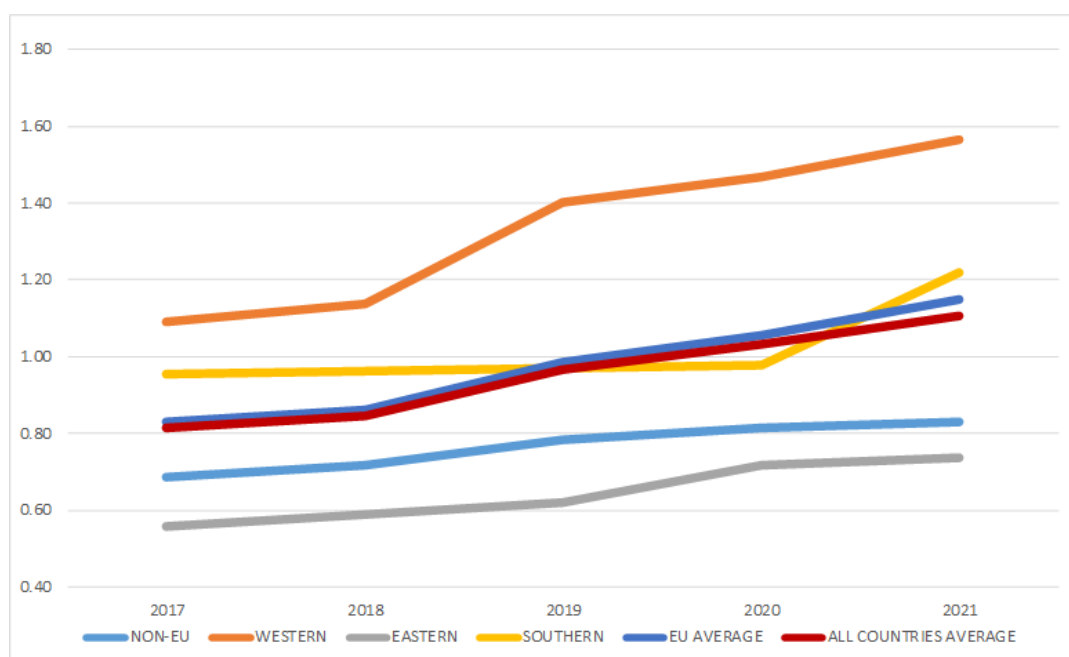
The following section identifies the primary market outcomes in terms of the prices of postal services. First, it considers the tariffs of the domestic priority and non-priority letters and the price of posting a priority letter within Europe. It then identifies the rates of the domestic priority parcel and the price of posting an intra-community priority parcel to the closest neighbour country.

4.1.1. Letter price evolution in Europe

In 2021, the average European price for posting a domestic priority letter of 20 grams was €1.11,⁹ representing a 36.0% nominal price increase between 2017 and 2021 and an annual nominal growth rate of 8.0%.

The figure below shows that the upward trend in domestic priority letter prices continued in 2021 and that the growth has increased compared to the previous year, with 7.3% in 2021 against 6.7% in 2020. The Western countries had the highest nominal price increase since 2017 (43.6%), while the Non-EU countries had the lowest (20.9%) since 2017.

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



Notes:

1. Prices are in Euros, on 1st January of each year. The exchange rates of 01/07/2021 were applied on all previous years in order to filter out changes of these exchange rates over the years.
2. Average prices for the 30 countries that offer priority letter post service. RS started offering a priority letter in 2021 and therefore, is only included in the averages for 2021. FI started offering a D+2 product in 2019. For the years 2017 – 2018 average prices include 28 countries,

⁹ Median: €0.86

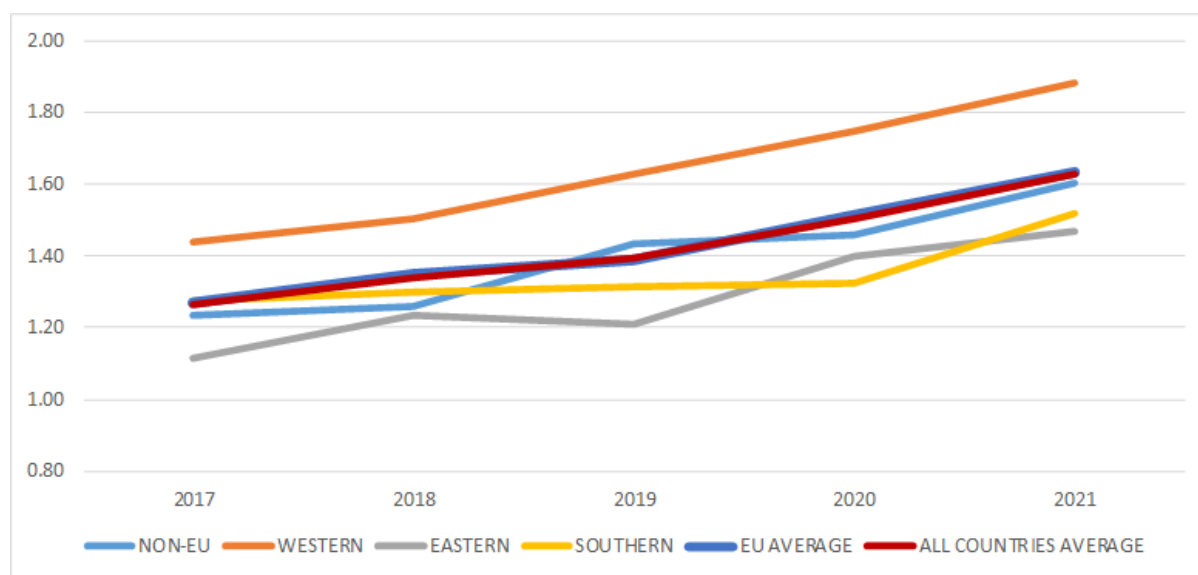


- for the years 2019-2020 average prices include 29 countries. ES and MK are not included since there is only one category of letter post without differentiation between 'priority' and 'non-priority' service in D+3.
3. Estimates for 2017-2019 for ME and TR. Estimates for 2021 for EE, ME and NL.
 4. FI: Services to be delivered in D+2. Before 2019, there were also other letter products offered (and are still being offered). However, the prices are not comparable to the D+2 domestic priority letter.
 5. SE: Services to be delivered in D+2.
 6. NO: Services to be delivered in D+3.
 7. Standard postal items provided by the USP/Incumbent at single piece tariff for typical residential customers.
 8. 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.
 9. The weight limit is up to 50 grams for BE, BG, CZ, HR, MT and SK. The weight limit is 100 grams for DK.
 10. Price in NO includes 25% VAT.

The average price for posting a 20 grams international letter within Europe in 2020 was €1.63¹⁰, an 8.2% increase compared with the previous year. From 2017 to 2021, the average price increased by 28.7%, a 6.5% annual average nominal increase.

The spread between the different regions is much smaller than the domestic priority letters and is more uniform. The prices for the international letter have sustained an upward trend since 2017.

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



Notes:

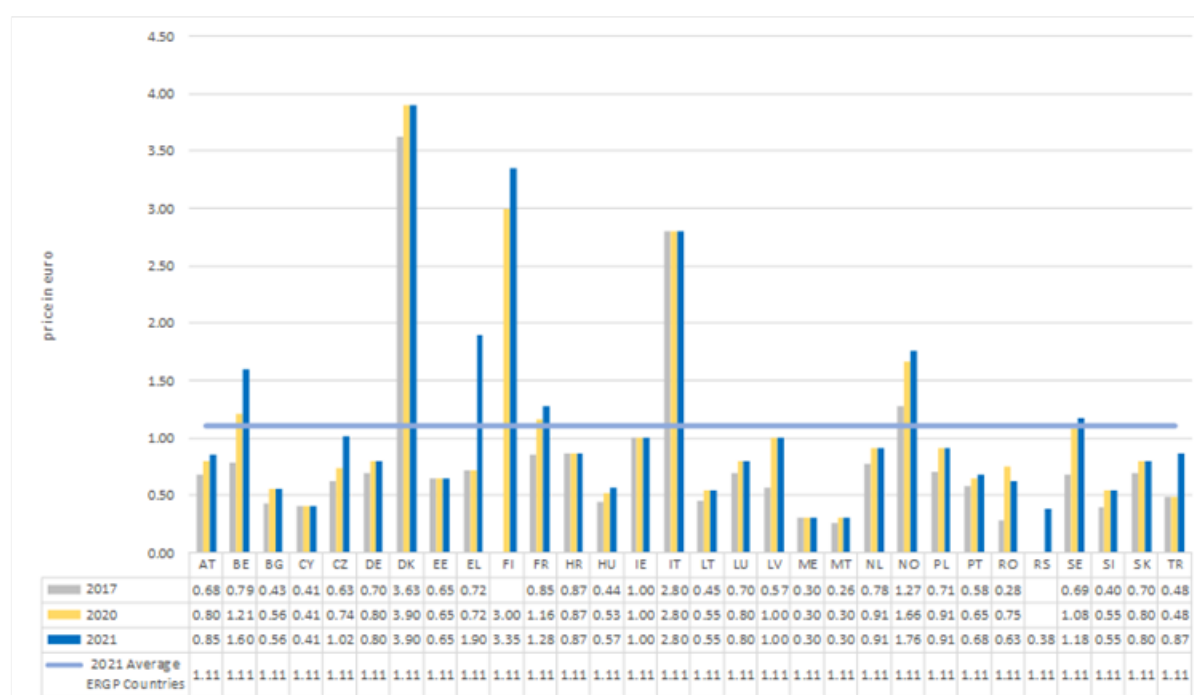
1. Prices are in Euros, on 1st January of each year. The exchange rates of 01/07/2021 were applied on all previous years in order to filter out changes in these exchange rates over the years.
2. Average prices for the 31 countries. No data for ME.
3. Estimates for 2017-2019 for TR, Estimates for 2021 for EE and NL.
4. Standard postal items provided by the USP/Incumbent at single piece tariff for typical residential customers.
5. 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.
6. The weight limit is 30 grams for MT. The weight limit is 50 grams for BE, CZ, HR, LU and SK. The weight limit is 100 grams for DK.
7. Price in SI includes 22% VAT.

¹⁰ Median: €1.50.

4.1.2. Domestic letter prices

Most European countries had a price below average (€1.11) in 2021¹¹. Denmark (DK) has the highest price (€3.90), followed by Finland (FI) and Italy (IT). In contrast to those high price levels, Malta (MT) and Montenegro (ME) have the lowest price (€0.30), as shown in the figure below. The highest increase in 2021 was in Greece (EL), from €0.72 to €1.90, representing a 163.9% increase. Between 2017 and 2021, Cyprus (CY), Estonia (EE), Croatia (HR), Ireland (IE)¹², Italy (IT) and Montenegro (ME) have not changed the price of their domestic priority letter post.

Figure 3 – Price of Domestic single-piece Priority Letter (20 gr) in 2017, 2020 and 2021



Notes:

1. Prices are in Euros, on 1st January of each year. The exchange rates of 01/07/2021 were applied on all previous years in order to filter out changes of these exchange rates over the years.
2. Average prices for the 30 countries that offer priority letter post service. RS started offering a priority letter in 2021 and therefore, is only included in the averages for 2021. FI started offering a D+2 product in 2019. For the years 2017 – 2018 average prices include 28 countries, for the years 2019-2020 average prices include 29 countries. ES and MK are not included since there is only one category of letter post without differentiation between 'priority' and 'non-priority' service in D+3.
3. Estimates for 2017-2019 for ME and TR. Estimates for 2021 for EE, ME and NL.
4. FI: Services to be delivered in D+2. Before 2019, there were also other letter products offered (and are still being offered). However, the prices are not comparable to the D+2 domestic priority letter.
5. SE: Services to be delivered in D+2.
6. NO: Services to be delivered in D+3.
7. Standard postal items provided by the USP/Incumbent at single piece tariff for typical residential customers.
8. 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.
9. The weight limit is up to 50 grams for BE, BG, CZ, HR, MT and SK. The weight limit is 100 grams for DK.
10. Price in NO includes 25% VAT.

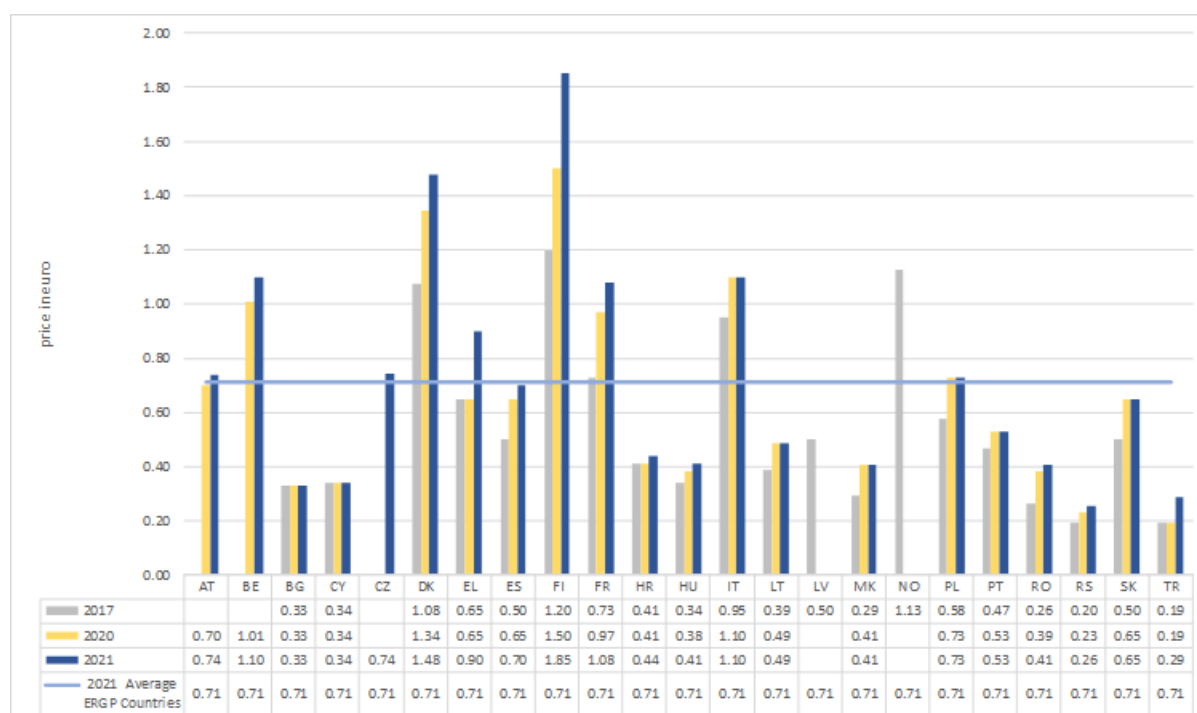
¹¹ Median: €0.86

¹² Ireland increased its price from €1.00 to €1.10 in May 2021.

In 2021, the average price in Europe for posting a domestic non-priority standard letter was €0.71¹³, a 9.6% increase compared to 2020 (€0.65). The following countries did not offer a non-priority service on 1st January 2021: Germany (DE), Estonia (EE), Ireland (IE), Malta (MT), the Netherlands (NL), Slovenia (SI), Luxembourg (LU), Latvia (LV), Montenegro (ME), Norway (NO) and Sweden (SE).

In 2021, Finland (FI) had the highest price (€1.85), and Serbia (RS) had the lowest (€0.26). Between 2017 and 2021, Cyprus (CY) and Bulgaria (BG) are the only countries that have not changed the price of their non-priority letter service.

Figure 4 – Price of Domestic Non-Priority single-piece Letter (20 gr) in 2017, 2020 and 2021



Notes:

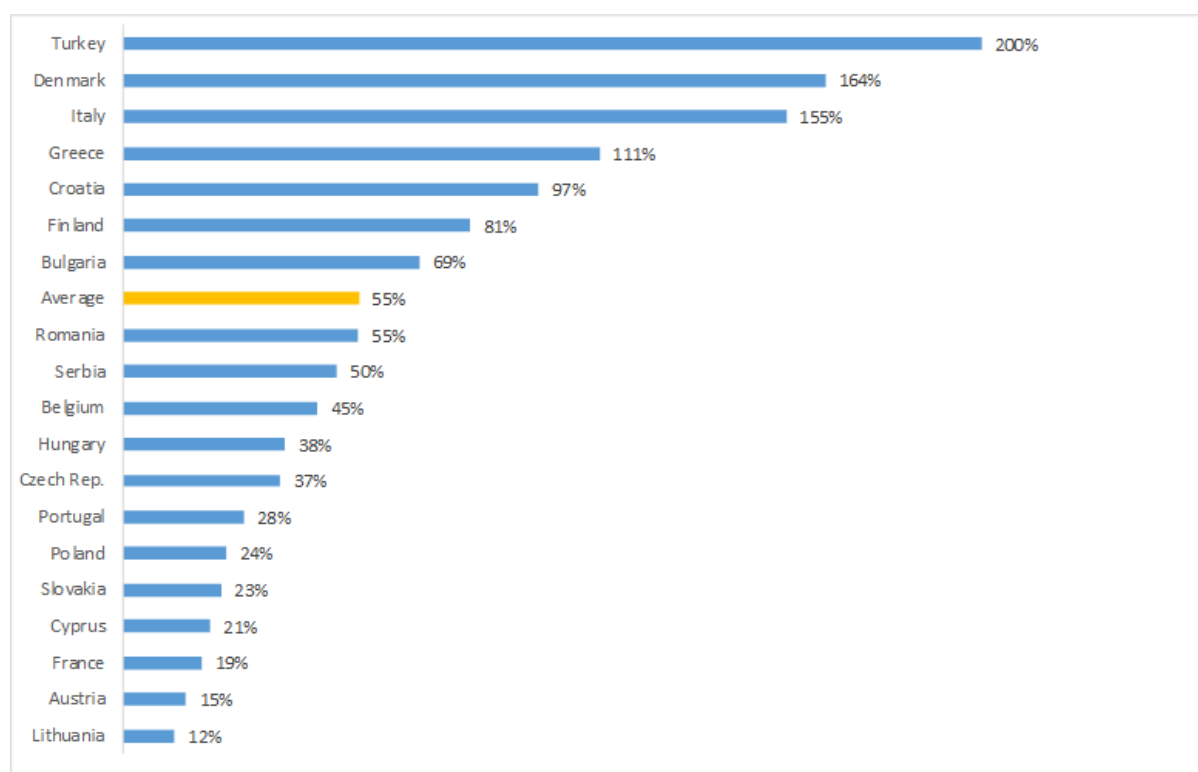
1. Prices are in Euros, on 1st January of each year. The exchange rates of 01/07/2021 were applied on all previous years in order to filter out changes of these exchange rates over the years.
2. Average price for the 21 countries that offer non-priority letter post service in 2021. Non-priority letter post service is not applicable in DE, EE, IE, MT, NL, LU, LV, NO, ME, SI and SE on 1st January 2021. LV and NO are included for 2017. No data for 2017 for AT.
3. Estimate for 2017-2019 for TR.
4. Standard postal items provided by the USP/Incumbent at single piece tariff for typical residential customers.
5. 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.
6. The weight limit is 50 grams for BE, BG, CZ, DK, HR and SK.
7. CZ and FR have a delivery speed of D+2.
8. DK has a delivery speed of D+5 and IT D+4.
9. In Belgium, a non-priority stamp was offered again from 2019 on.
10. In Latvia, there was no non-priority letter since 2020.
11. Czech Republic started offering a non-priority letter from the 1st of February 2020. It is offered at the former price of the priority letter (0.74€). Therefore, the price of the priority letter increased to 1.02€.
12. TR: Unregistered letter prices were entered.

¹³ Median: €0.65.

There is a different pricing policy amongst countries that offer both priority and non-priority letter service. Four countries have a high price difference, with a price difference above 100%: Turkey (TR), Denmark (DK), Italy (IT) and Greece (EL). The price difference for the European average is 55%.

Turkey (TR) shows the most significant difference between priority and non-priority. They had a significant price increase for its priority letter in 2021. 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, consequently raising the average costs incurred for priority services.

Figure 5 – Price difference between priority and non-priority domestic letters in 2021 (%)



Notes:

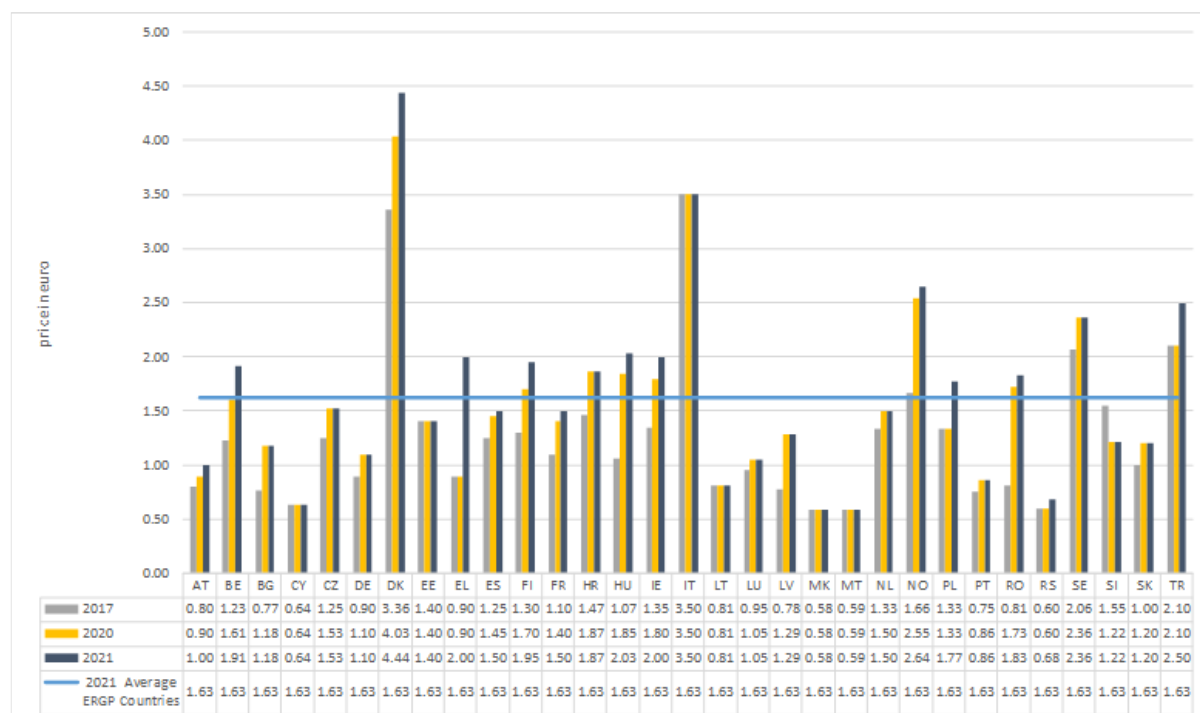
1. Please refer to notes of Figures 3 and 4.
2. Price difference for every country, where the USP offers both, the domestic priority letter and the domestic non-priority letter.

4.1.3. International letter prices

In 2021, the average European price for posting a letter weighing less than 20gr from one country to another EU country was €1.63¹⁴. Compared to 2020 (€1.50), this represents a price increase of 8.2%. Denmark (DK) shows the highest price (€4.44) in 2021, and North Macedonia (MK) has the lowest (€0.58). As for priority letters, most countries have tariffs below the average, given that it is higher due to Denmark (DK) and Italy (IT).

¹⁴ Median: €1.50

Figure 6 – Average price for posting an international priority letter of 20 gr within Europe in 2017, 2020 and 2021



Notes:

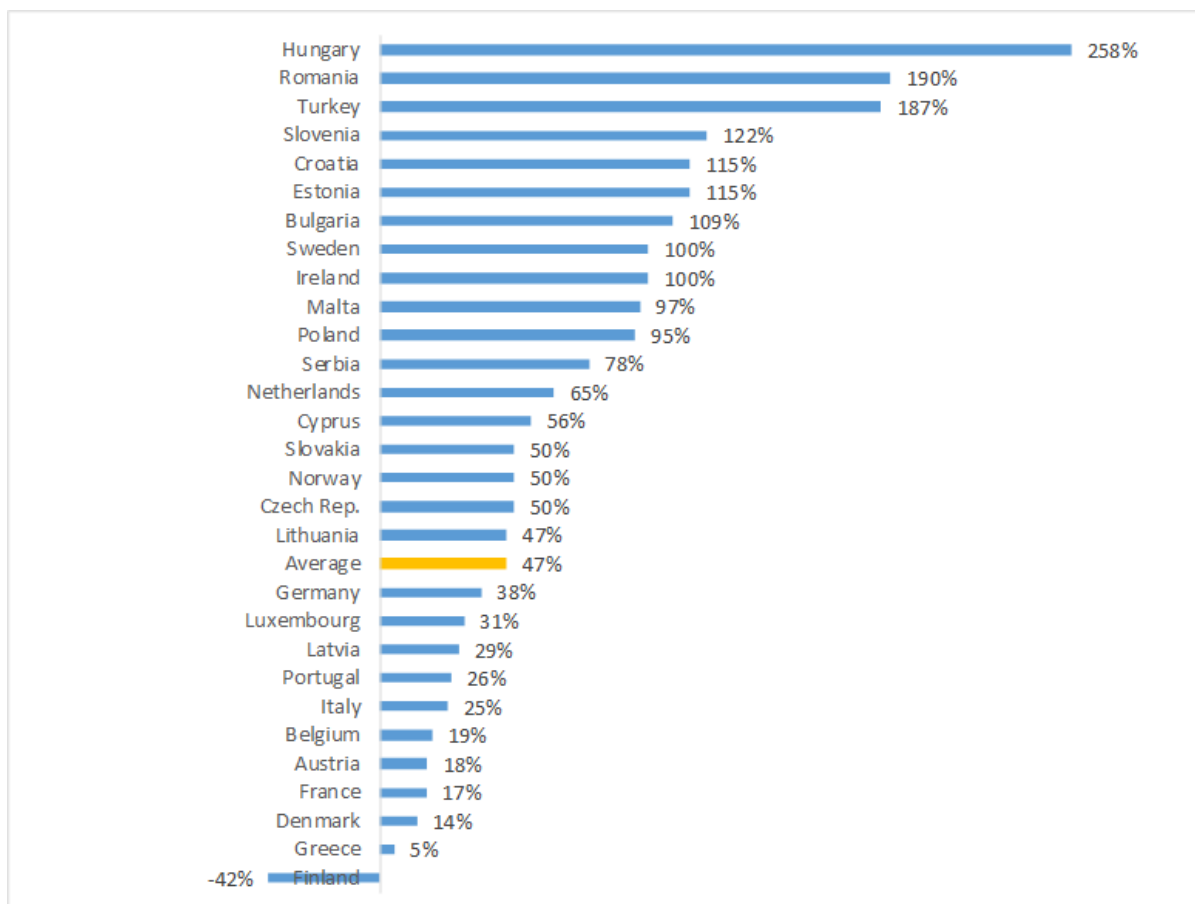
1. Prices are in Euros, on 1st January of each year. The exchange rates of 01/07/2021 were applied on all previous years in order to filter out changes of these exchange rates over the years.
2. Average price for the 31 countries. No data for ME.
3. Estimates for 2017-2019 for TR, Estimates for 2021 for EE and NL.
4. Standard postal items provided by the USP/Incumbent at single piece tariff for typical residential customers.
5. 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.
6. The weight limit is 30 grams for MT. The weight limit is 50 grams for BE, CZ, HR, LU and SK. The weight limit is 100 grams for DK.
7. Price in SI includes 22% VAT.
8. PT: The price for the international letter to Spain is € 0.76.

Looking at the price difference between international priority letter posts and domestic priority letter posts, Hungary (HU) is a clear outlier with an international priority letter price more than two times higher than the domestic priority letter price. Six more countries have a difference of more than 100% between the international and domestic priority letters: Romania (RO), Turkey (TR), Slovenia (SI), Croatia (HR), Estonia (EE) and Bulgaria (BG). Additionally, Sweden (SE) and Ireland (IE) show a difference of 100%. When it comes to Slovenia (SI), the explanation lies in the fact that they have an alternative non-priority international letter and that the priority is not part of the universal services, and therefore the VAT is applied. When looking at the average, the international priority letter is, on average, about 47% more expensive than a domestic priority letter. Globally, Eastern countries show significant differences between domestic priority and international for letters due to various factors such as terminal dues and transportation fees.

The priority letter in Denmark (DK) has almost the same price as an international priority letter. The reason is that it is the country showing the second highest price for priority letters and is the only

country offering a D+5 international priority letter instead of D+3 like most countries. On the other hand, the domestic priority letter in Finland is more expensive than the international priority letter by 42%.

Figure 7 – The price difference between international priority and domestic priority letters in 2021 (%)



Notes:

1. Please refer to notes of Figures 3 and 6.
2. Price difference for every country, where the USP offers both the domestic priority letter and the international priority letter.

4.1.4. Parcel price evolution in Europe

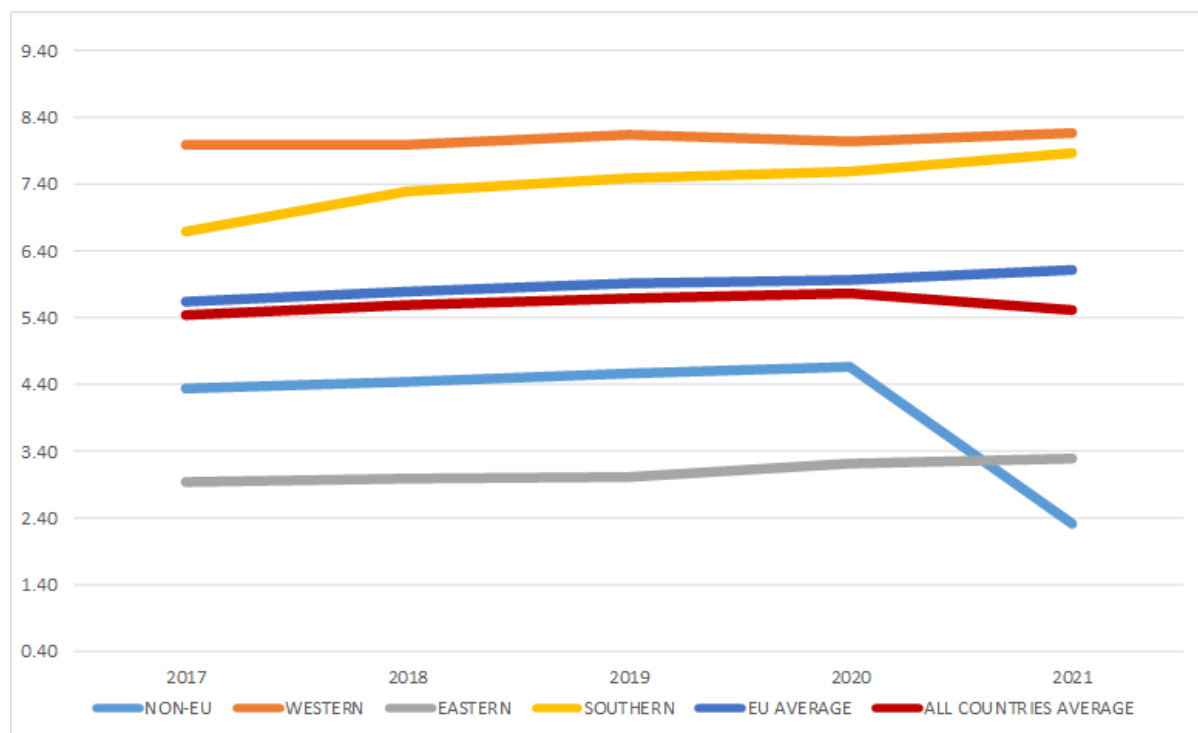
For 2021, the average European price for posting a domestic parcel provided by the USP/incumbent was €5.53¹⁵ against €5.78 in 2020, representing a 4.3% nominal price decrease.¹⁶ The geographical clusters show a similar evolution, a slight increase or decrease in prices, except for the Non-EU countries, which show a strong decrease. During the 2017-2021 period, Western countries had the highest price for posting a domestic parcel. On the contrary, the Eastern cluster has much lower prices. In 2021, the Non-EU countries showed the highest decrease and the lowest prices. The main

¹⁵ Median: €4.58

¹⁶ In the individual European countries, next to stable prices, there have been decreases as well as increases of the standard domestic parcel price. However, the highest change in price has been in Norway (NO) with more than -60% price change.

explanation is that the parcel price in Norway (NO) was reduced from € 18.12 in 2020 to € 6.86 due to a change in the weight classification by the USP.

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



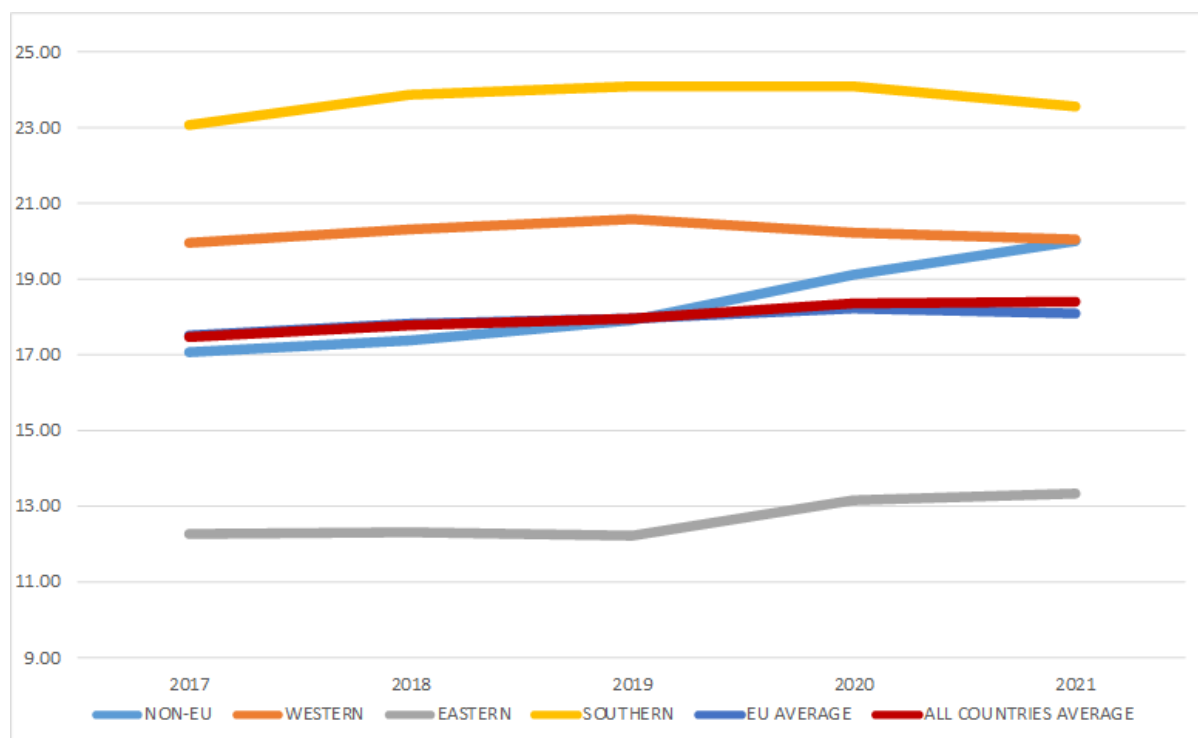
Notes:

1. Prices are in Euros, on 1st January of each year. The exchange rates of 01/07/2021 were applied on all previous years in order to filter out changes of these exchange rates over the years.
2. Average price for the 32 countries.
3. Estimates for 2017-2019 for ME and TR. Estimates for 2017-2020 for FI. Estimates for 2021 for EE, ME and NL.
4. Standard postal items provided by the USP/Incumbent at single piece tariff for typical residential customers.
5. 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.
6. EE and IE have a delivery speed of D+1. AT, BE, BG, EL (2017-2020), FR, DE, DK, FI, ME, RO, LV, LT, LU, NL, PL, PT, RS, SE, SI, SK and HU have a delivery speed of D+2. EL (2021) and HR have a delivery speed of D+3. IT and NO have a delivery speed of D+4.
7. The weight limit is 5kg for SK.
8. Price in NO includes 25% VAT.

In 2021, the average price for posting an international parcel provided by the USP/incumbent within Europe was €18.40¹⁷, against €18.35 in 2020 and €17.45 in 2017; this brings the average annual nominal increase since 2017 to 1.3%. The Western cluster has shown a downward trend since 2019 due to, among other reasons, the price decrease in Finland of 13.1%. Additionally, the Southern Cluster has shown a downward trend since 2020 due to a price decrease in Greece of 21.9%. The Southern cluster has a higher price level than the other clusters. The Eastern cluster shows the lowest prices.

¹⁷ Median: €15.16.

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. Prices are in Euros, on 1st January of each year. The exchange rates of 01/07/2021 were applied on all previous years in order to filter out changes of these exchange rates over the years.
2. Average prices for the 32 countries.
3. Estimates for 2017-2019 for ME and TR. Estimates for 2021 for EE, ME and NL.
4. Standard postal items provided by the USP/Incumbent at single piece tariff for typical residential customers.
5. 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 has a delivery speed of D+3 to D+5 and Italy has a delivery speed of D+10 to D+15.

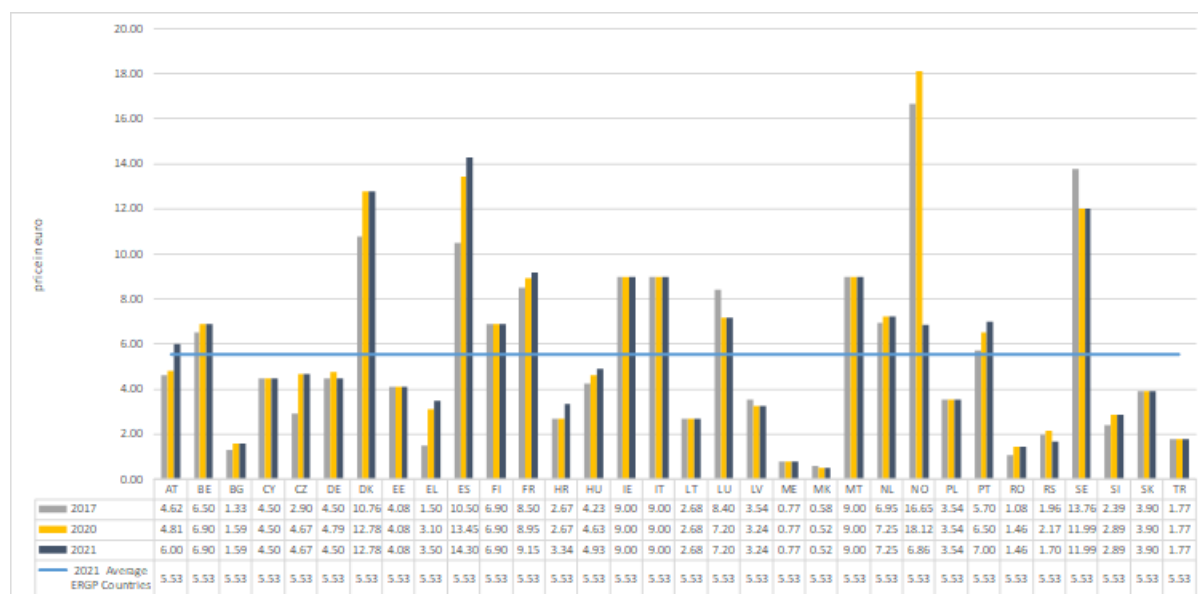
4.1.5. Domestic priority parcel prices

In 2021, Spain (ES) had the highest price for posting a domestic 2kg priority parcel (€14.30), while North Macedonia (MK) had the lowest (€0.52), as shown in the figure below, which indicates a vast intra-European range of prices for the same type of product.

Moreover, it is worth mentioning that over the last four years (2017-2021), Cyprus (CY), Estonia (EE), Finland (FI), Ireland (IE), Italy (IT), Lithuania (LT), Luxembourg (LU), Latvia (LV), Montenegro (ME), North Macedonia (MK), Malta (MT), Sweden (SE), Slovakia (SK), Poland (PL) and Turkey (TR) have not increased the price of the domestic priority parcel post.



Figure 10 – Price of posting a domestic 2 kg priority parcel in 2017, 2020 and 2021



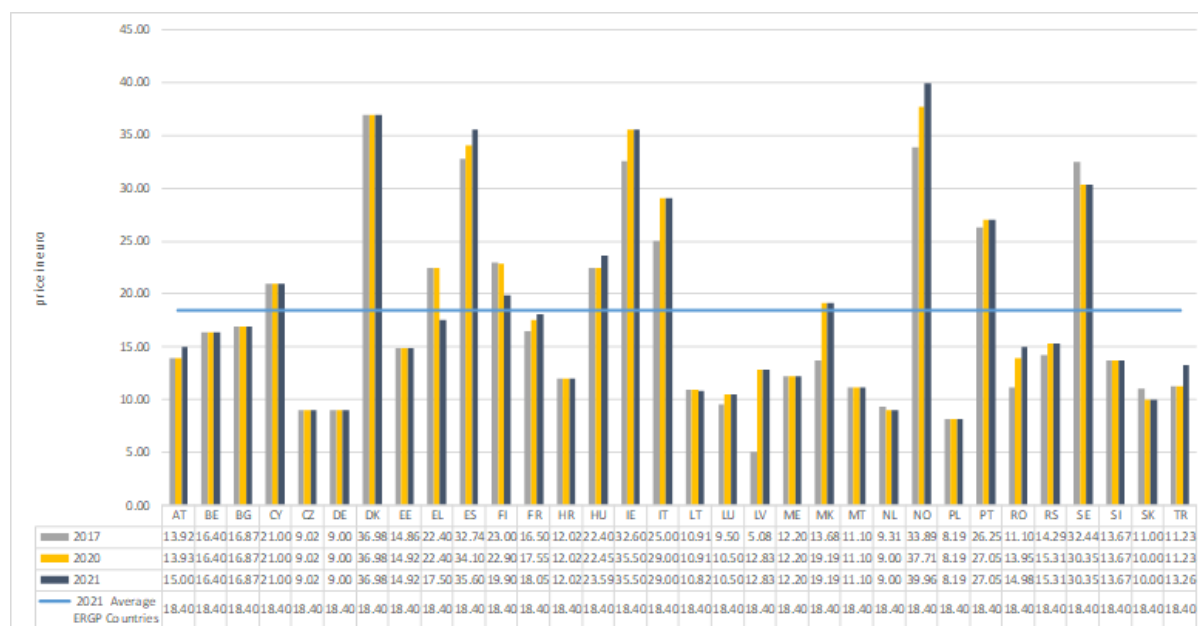
Notes:

1. Prices are in Euros, on 1st January of each year. The exchange rates of 01/07/2021 were applied on all previous years in order to filter out changes of these exchange rates over the years.
2. Average prices for the 32 countries.
3. Estimates for 2017-2019 for ME and TR. Estimates for 2017-2020 for FI. Estimates for 2021 for EE, ME and NL.
4. Standard postal items provided by the USP/Incumbent at single piece tariff for typical residential customers.
5. 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.
6. EE and IE have a delivery speed of D+1. AT, BE, BG, EL (2017-2020), FR, DE, DK, FI, ME, RO, LV, LT, LU, NL, PL, PT, RS, SE, SI, SK and HU have a delivery speed of D+2. EL (2021) and HR have a delivery speed of D+3. IT and NO have a delivery speed of D+4.
7. The weight limit is 5kg for SK.
8. Price in NO include 25% VAT.
9. RS: Change in product since 2021 as the USP introduced an ordinary parcel, which has a lower price. Before there were insured parcels only.

4.1.6. International priority parcel prices

In 2021, the average European price for posting an international priority parcel weighing 2kg to the cheapest zone within Europe was €18.40, which indicates a price increase of 0.3% compared to 2020. As can be observed in the figure below, Norway (NO) had the highest price (€39.96) in 2021, while Poland (PL) had the lowest (€8.19).

Figure 11 – Price of posting a 2 kg international parcel provided by the USP/incumbent within Europe (cheapest zone) in 2017, 2020 and 2021

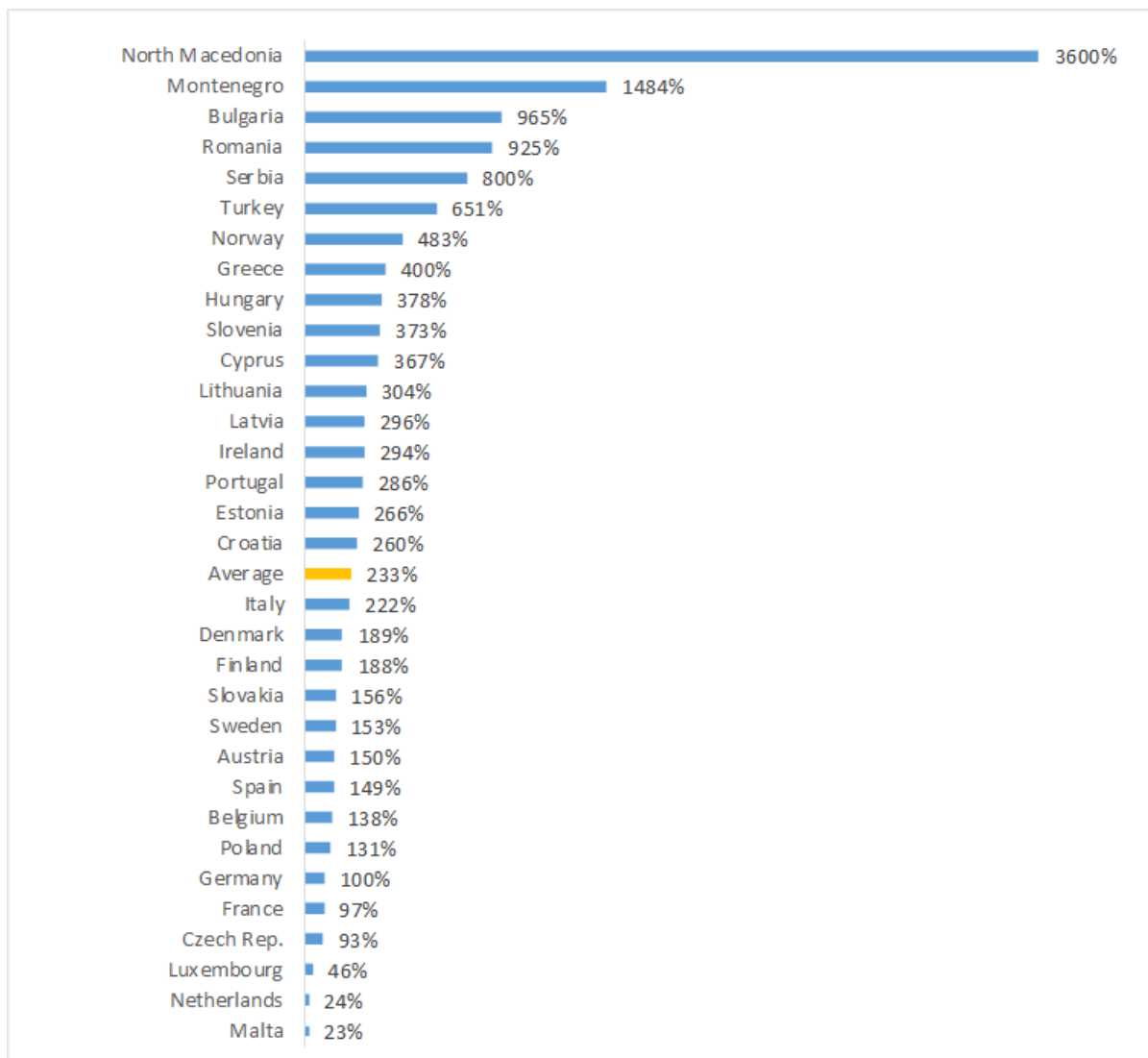


Notes:

1. Prices are in Euros, on 1st January of each year. The exchange rates of 01/07/2021 were applied on all previous years in order to filter out changes of these exchange rates over the years.
2. Average prices for the 32 countries.
3. Estimates for 2017-2019 for ME and TR. Estimates for 2021 for EE, ME and NL.
4. Standard postal items provided by the USP/Incumbent at single piece tariff for typical residential customers.
5. 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 has a delivery speed of D+3 to D+5 and Italy has a delivery speed of D+10 to D+15.

There are some clear outliers when observing the price difference between international and domestic priority parcel posts. In North Macedonia (MK), an international priority parcel is over 35 times more expensive than a domestic priority parcel. The international parcel in Montenegro (ME) is also almost 15 times more expensive than the domestic parcel. When comparing the situation in Europe overall, the international priority parcel is, on average, about 233% more expensive than a domestic priority parcel. 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, thereby diminishing the difference to the international priority letter, which on average is D+3.

Figure 12 – The price difference between international priority and domestic priority of 2kg parcels in 2021 (%)



Notes:

1. Please refer to notes of Figures 10 and 11.
2. Price difference for every country, where the USP offers both, the domestic priority parcel and the international priority parcel.

4.1.7. EC prices sample, minimum, maximum and USP prices for a 1 kg international parcel

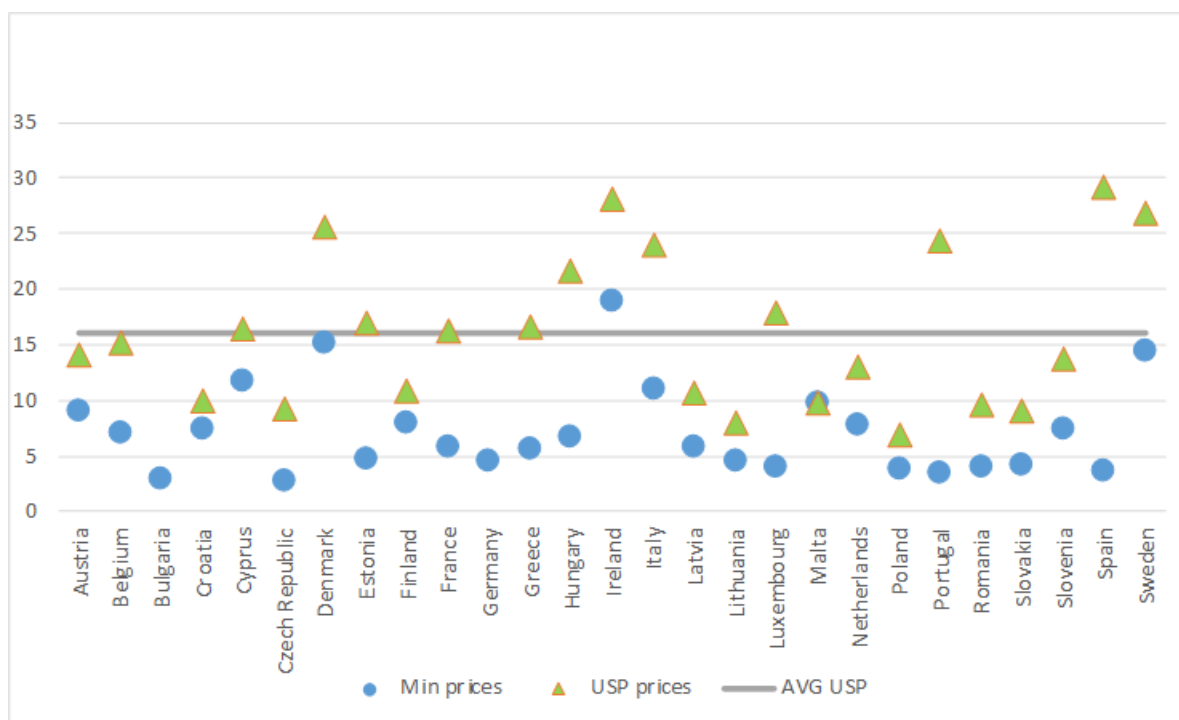
In line with the cross-border parcel regulation EU 2018/644, information was gathered for the cross-border prices (EC data). The EC data shows that the standard deviation for the price of a product is more significant within national markets than between European USPs. Also, the USP prices are much closer to the minimum prices than the maximum prices, which are not depicted in the figure below since they will skew the chart.

The fact that USP tariffs are closer to the minimum than the maximum might seem counterintuitive as it could be assumed that the USP benefits from some market power on US products and could thereby ask for higher prices. One explanation is that some of the listed products within a product type are very different and more valuable. Another reason could be the tariff regulation since in some countries, like France (FR), the NRA regulates single-piece parcel tariffs in the scope of the universal service.

USP prices for a 1kg international parcel can significantly differ from the minimum price in the respective national market, from 0% (meaning that the USP is the cheapest, as in the case of Malta (MT)) to more than seven times higher as in Spain (ES). In addition, the minimum prices by an operator do not have to be the same for every EU country, and parcels may be cheaper when delivered to a country close to the border than to a country that geographically is farther away and classified in a different zone despite being within the EU.

A pertinent analysis of the averages is complicated as outliers have an important impact due to the small number of companies.

Figure 13 – Prices of a 1kg intra-EU parcel (track-trace) in 2021: USP and minimum price collected by the EC (in euros)



Source: NRA

Notes:

1. The USP price in Ireland, Latvia, Lithuania and Luxembourg regards a 1kg international standard parcel in 2021.

4.1.8. Conclusions

There has been a significant price increase for single-piece letters in the last few years, especially priority letters. For parcels, prices decreased slightly in 2021. International parcel tariffs have increased a little, but they are much more expensive in countries outside the EU and Southern EU countries. In Eastern countries, prices for parcels and domestic letters are much cheaper. In the last five years, the prices for domestic parcels were not changing considerably in Western Europe. 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, thereby diminishing the difference with the international priority letter, which on average, is D+3.



4.2. Market structure

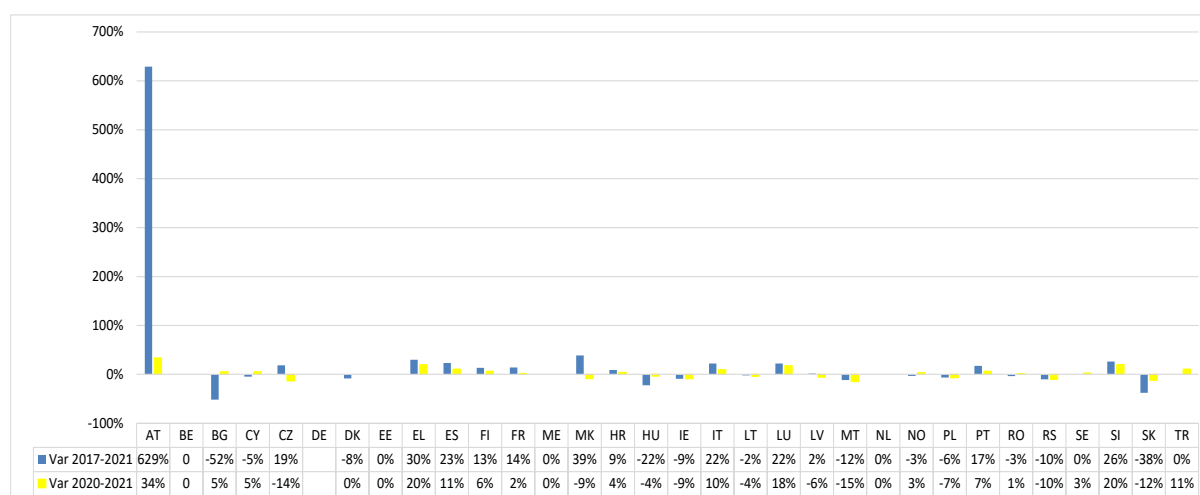
This section presents quantitative data to provide an overview of the structure of the European postal market.

4.2.1. Number of active postal service providers

According to the available data, between 2017-2021, there was an increase in the number of active postal service providers (PSP) on a European scale. In total, the number of PSPs in the EU increased by 1,338 providers compared to 2017 (7%).

The highest absolute increase in terms of the number of active PSPs in this period was registered in Italy (IT), with an increase of 644 active PSPs (+22%), followed by Spain (ES) with an additional 412¹⁸ active PSP (+23%), Greece (EL) with an additional 166 active PSP (+30%), and Austria (AT) with an additional 151 active PSP (+629%). Notwithstanding the overall trend of increasing the number of active PSPs, twelve countries witnessed a decrease in PSPs in 2021 compared to 2017¹⁹. When looking more closely at the variation between 2017 and 2021, it is observable that there is a significant variation in Austria (AT) (representing 151 PSP, corresponding to +629%²⁰). Eleven additional countries show an increase greater than or equal to 5%: the Czech Republic (CZ), Greece (EL), Spain (ES), Finland (FI), France (FR), North Macedonia (MK), Croatia (HR), Italy (IT), Luxembourg (LU), Portugal (PT), Slovenia (SI). Also, another nine countries show a decrease greater or equal to 5%: Bulgaria (BG), Cyprus (CY), Denmark (DK), Hungary (HU), Ireland (IE), Malta (MT), Poland (PL), Serbia (RS), Slovakia (SK).

Figure 14 – Change in the number of active PSP between 2017 and 2021 (%)



¹⁸ The observed variation could be attributed to the increase in smaller postal operators and individual sub-contractors providing services at local level.

¹⁹ Germany indicates an additional lower number of active PSP. This is only due to cleaned data and is therefore not to be considered as a decrease.

²⁰ This increase only results from a change in Austria’s approach that each sub-contractor is a postal provider.

NOTES:

1. AT: increase is due to ECJ decision 259-2016. See 260 - 2016 of the 31st May 2018 which entailed a change in the definition of the postal service provider (each sub-contractor is a postal provider).
2. BE: many transport companies in the nace code (in total about 700), no number used for this figure
3. DE: Due to cleaned data, there is a change in the number by 2130. For the total number of PSP in Europe, we add 11,400 instead of 13,530 for 2017 to have comparable totals over the years.
4. EL: This is the number of active postal licences in the Postal Companies Registry of EETT. For 2021 we only collect data from providers with revenue > €100.000
5. NO: Registered with the NRA as provider of postal services. There might be more undertakings that provide one or more postal services but are still not registered with the NRA. This is work in progress.
6. RO: provisional
7. SE: Active licensed POs plus additional PDSPs reporting according to EU Parcel Regulation (change from previous questionnaires)
8. SI: 34 registered postal service providers; 5 unknown status (no reply), 5 inactive in 2021

Figure 15 – Active postal service providers

Country	2017	2020	2021	Variation 2017-2021	
				Absolute Value	%
AT	24	131	175	151	629%
BG	159	73	77	-82	-52%
CY	21	19	20	-1	-5%
CZ	27	37	32	5	19%
DE	13,530	11,400	11,400	-	-%
DK	12	11	11	-1	-8%
EL	554	601	720	166	30%
ES	1765	1966	2177	412	23%
FI	15	16	17	2	13%
FR	43	48	49	6	14%
MK	31	47	43	12	39%
HR	22	23	24	2	9%
HU	202	163	157	-45	-22%
IE	11	11	10	-1	-9%
IT	2904	3237	3548	644	22%
LT	50	51	49	-1	-2%
LU	27	28	33	6	22%
LV	63	68	64	1	2%
MT	26	27	23	-3	-12%
NO	31	29	30	-1	-3%
PL	143	144	134	-9	-6%
PT	69	76	81	12	17%
RO	231	220	223	-8	-3%
RS	59	59	53	-6	-10%
SE	-	39	40	-	-
SI	19	20	24	5	26%
SK	24	17	15	-9	-38%
TR	-	37	41	-	-
TOTAL	17,932	18,598	19,270	1,338	7%

NOTES:

1. AT: increase is due to ECJ decision 259-2016. See 260 - 2016 of the 31st May 2018 which entailed a change in the definition of the postal service provider (each sub-contractor is a postal provider).
2. BE: many transport companies in the nace code (in total about 700), no number used for this figure
3. DE: Due to cleaned data, there is a change in the number by 2,100. For the total number of PSP in Europe, we add 11,400 instead of 13,530 for 2017 to have comparable totals over the years.
4. EL: This is the number of active postal licences in the Postal Companies Registry of EETT. For 2021 we only collect data from providers with revenue > €100.000
5. NO: Registered with the NRA as provider of postal services. There might be more undertakings that provide one or more postal services, but are still not registered with the NRA. This is work in progress.
6. RO: provisional
7. SE: Active licensed POs plus additional PDSPs reporting according to EU Parcel Regulation (change from previous questionnaires)
8. SI: 34 registered postal service providers; 5 unknown status (no reply), 5 inactive in 2021
9. EE, ME, NL: no data provided/ not available data
10. Cells are blank for the change between 2017-2021, when data was missing for 2017
11. Due to missing data for 2017 for some countries, the absolute value changes do not add up to 1,338, but to 1,257.

4.2.2. Indicators of the level of market concentration

The Herfindahl-Hirschman Index is an index that measures the market concentration of the industry. A highly concentrated industry is one where only a few players hold a large percentage of the market share, indicating an oligopoly or monopolistic competition as the market form. If only one firm has a significantly large market share, it indicates a near-monopolistic market form. A low concentration means that the industry is closer to a perfect competition scenario, where many firms of more or less equal size share the market.

Following what had already been observed in previous reports, the Herfindahl-Hirschman index (HHI) analysis shows that the European Letter postal market is highly concentrated, both in terms of volumes and revenues, as illustrated in the figure below.

Figure 16 – HHI (Volumes and Revenues) for Letter Postal Market 2017 – 2021

Country	Letter Post Based on volumes					Letter Post Based on revenues				
	2017	2020	2021	Variation 2017-2021 (%)	Variation 2020-2021 (%)	2017	2020	2021	Variation 2017-2021 (%)	Variation 2020-2021 (%)
AT	9,722	9,848	9,827	1%	0%	9,747	9,885	9,872	1%	0%
BE	9,656	9,581	9,562	-1%	0%	9,701	9,762	9,754	1%	0%
CY	10,000	10,000	10,000	0%	0%	10,000	10,000	10,000	0%	0%
CZ	9,025	8,645	8,557	-5%	-1%	9,497	9,275	9,334	-2%	1%
DE	7,141	7,178	7,144	0%	0%	7,418	7,206	7,230	-3%	0%
DK	9,462	9,395	9,270	-2%	-1%	-	-	-	-	-
EL	6,316	4,844	4,366	-31%	-10%	3,778	2,929	2,706	-28%	-8%
ES	7,571	8,933	8,123	7%	-9%	8,447	9,230	8,924	6%	-3%
FR	9,859	9,778	9,739	-1%	0%	9,836	9,781	9,768	-1%	0%
MK	9,376	8,507	7,850	-16%	-8%	6,208	5,142	3,950	-36%	-23%
HR	7,630	8,229	9,366	23%	14%	8,929	9,253	9,714	9%	5%
HU	8,264*	9,876	9,944	-	1%	8,264*	8,175	8,597	-	5%
IT	9,012	8,971	9,015	0%	0%	9,332	9,254	9,181	-2%	-1%

LT	7,645	7,555	7,314	-4%	-3%	1,793.1*	7,921	7,126	-	-10%
LU	-	9,032	9,385	-	4%	-	9,274	9,340	-	1%
LV	-	9,179	9,155	-	0%	-	9,645	-	-	
MT	9,475	9,344	9,475	0%	1%	5,533	5,656	5,421	-2%	-4%
PT	8,894	8,177	8,139	-8%	0%	7,097	7,692	7,574	7%	-2%
RO	-	4,032	4,185	-	4%	-	3,757	4,191	-	12%
RS	10,000	10,000	10,000	0%	0%	10,000	10,000	10,000	0%	0%
SE	6,575	6,254	6,291	-4%	1%	-	7,932	7,815	-	-1%
SI	6,639	6,319	6,280	-5%	-1%	7,253	7,330	6,593	-9%	-10%
SK	8,129	7,874	7,635	-6%	-3%	8,068	9,008	8,718	8%	-3%
TR	10,000	10,000	10,000	0%	0%	10,000	10,000	10,000	0%	0%

NOTES:

1. AT: incl. letters (domestic and international), newspapers, periodicals, registered mail, insured mail, official documents.
2. BG Calculated HHI separately for universal services in terms of revenue only. Here is include standard parcel service with a maximum of 20kg.
3. CY: Only the USP handles letters.
4. HU: Uses the same indicator for volumes and revenues for year 2017.
5. IT: Compared to previous transmission the data of the USP now include those of operators (Nexive mainly for letters and SDA Courier mainly for parcels) that Poste Italiane have recently bought. Therefore, some differences might appear compared to the previous historical series.
6. LT: Letter-post item include: 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). 2017 by total revenues - letter post and parcels.
7. MT: Express data is not very accurate and hence subject to variation.
8. NO: Since there most likely are several undertakings, providing one or more postal services, that are still not registered with the NRA (and not reporting volumes/revenues to the NRA), we do not find it appropriate to provide measures of the level of market concentration.
9. RO: provisional
10. RS: Only USP - public postal operator PE Posta Srbija provides letter services
11. TR: monopoly (there were only one firm in a market)
12. BG, EE, FI, IE, ME, NL, NO, PL: no data / no data for this figure

The concentration of the Parcel postal market is not as high as for the postal letter market, as shown in many countries that provided data, as shown in the figure below. There are some countries whose HHI is below 2000 considering revenues, such as Belgium (BE), Cyprus (CY), Greece (EL), Spain (ES), Croatia (HR), Italy (IT), Lithuania (LT), Luxembourg (LU), North Macedonia (MK), Romania (RO), Serbia (RS), Slovenia (SI), Slovakia (SK) and Turkey (TR). Generally, data shows that the market's concentration level is higher in terms of volumes than revenues.

Figure 17 – HHI (Volumes and Revenues) for Parcel Postal Market 2017 – 2021

Country	Parcel Post Based on volumes					Parcel Post Based on revenues				
	2017	2020	2021	Variation 2017-2021 (%)	Variation 2020-2021 (%)	2017	2020	2021	Variation 2017-2021 (%)	Variation 2020-2021 (%)
AT	2,910	3,721	3,493	20%	-6%	2208	3,076	2,950	34%	-4%
BE	1,756	2,231	2,187	25%	-2%	1,440	1,544	1,520	6%	-2%
CY	-	1,938	1,927	-	-1%	-	1,352	1,347	-	0%
CZ	3,128	3,419	3,078	-2%	-10%	3,337	2,827	2,278	-32%	-19%
DE	3,165	3,066	3,008	-5%	-2%	2,350	2,393	2,361	0%	-1%
DK	7,149	5,899	5,993	-16%	2%	-	-	-	-	-

EL	1,658	1,911	1,738	5%	-9%	1,143	1,238	1,189	4%	-4%
ES	1,069	1,030	1,559	46%	51%	1,101	972	1,068	-3%	10%
FR	4,101	3,765	3,253	-21%	-14%	3,077	3,238	3,133	2%	-3%
MK	-	-	1,280	-	-	-	-	1,470	-	-
HR	1,689	2,206	2,252	33%	2%	1,572	2,001	1,907	21%	-5%
HU	3,679*	2,523	4,118	-	63%	3,679*	2,000	3,786	-	89%
IT	1,881	1,948	1,932	3%	-1%	1,580	1,463	1,460	-8%	0%
LT	2,115	2,130	2,144	1%	1%	1,793.1*	1,442	1,412	-	-2%
LU	-	2,578	2,597	-	1%	-	1,818	1,754	-	-4%
LV	-	956	2,249	-	135%	-	-	-	-	-
MT	2,070	1,617	2,160	4%	34%	2,738	2,822	3,067	12%	9%
PT	2,681	3,260	3,174	18%	-3%	2,437	2,780	2,590	6%	-7%
RO	-	1,683	1,640	-	-3%	-	1,393	1,455	-	4%
RS	1,948	2,112	2,235	15%	6%	1,512	1,686	1,808	20%	7%
SE	-	4,047	3,493	-	-14%	-	3,602	2,904	-	-19%
SI	3,680	3,531	3,314	-10%	-6%	1,912	2,056	1,961	3%	-5%
SK	1,484	1,825	1,771	23%	-3%	1,102	1,307	1,294	17%	-1%
TR	1,768	1,563	1,465	-12%	-6%	1,357	1,371	1,211	-11%	-12%

NOTES:

1. AT: Parcels: domestic and international, up to 31.5 kg
2. BG: Calculated HHI separately for Express and courier services in terms of revenue only.
3. DE: Due to unpredictable subsequent deliveries of the 2020 data on the parcel market in Germany by some PDSP, the data has been updated.
4. ES: "In 2021, Amazon's data has been included for the first time (CNMC resolution: [STP/DTSP/006/20](#) – in Spanish). That explains, in part, the differences between 2020 and 2021 data. "
5. HU: It contains domestic parcels up to 40 kg. Uses the same indicator for volumes and revenues for year 2017.
6. IT: Compared to previous transmission the data of the USP now include those of operators (Nexive mainly for letters and SDA Courier mainly for parcels) that Poste Italiane have recently bought. Therefore, some differences might appear compared to the previous historical series.
7. LT: Weight limit is 50 kg for parcels outside the Universal Service. 2017 by total revenues - letter post and parcels.
8. MT: Express data is not very accurate and hence subject to variation.
9. NO: Since there most likely are several undertakings, providing one or more postal services, that are still not registered with the NRA (and not reporting volumes/revenues to the NRA), we do not find it appropriate to provide measures of the level of market concentration.
10. RO: provisional
11. SE: 2019 and 2020 recalculated including small packets from previous questionnaires
12. TR: It is an oligopoly market for the volumes and a monopoly market for the revenues.
13. BG, EE, FI, IE, ME, NL, NO, PL: no data / no data for this figure

The 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 total number of providers and providers with more than 1% of the market share, but that correlation is not as strong as expected, and there are very diverse country cases at the European level.

The following figure indicates that between 2017 and 2021, the number of operators with more than 1% of the market share varied, but there was no change in most countries between 2020 and 2021.

When looking specifically, at Letter postal market, at data based on volumes for 2020 and 2021, Germany (DE), Greece (EL), Spain (ES), Hungary (HU) and Lithuania (LT) observed a percentage

decrease, even though in terms of the absolute number of operators with more than 1% of the market share, this is not significant, while only in North Macedonia (MK) and Italy (IT) there has been an increase. When analysing data based on revenues, it is possible to note that there have been increases in Spain (ES), Hungary (HU), Poland (PL) and Slovakia (SK). At the same time, in the Czech Republic (CZ), Germany (DE), Greece (EL), North Macedonia (MK), Croatia (HR), Malta (MT) and Romania (RO), there was a percentage decrease in the number of operators with more than 1% market share. Notwithstanding, these variations per country do not seem significant in terms of absolute numbers.

Figure 18 – Number of postal service providers with more than 1% of the Letter postal market

Country	Based on volumes					Based on revenues				
	2017	2020	2021	Variation 2017-2021 (%)	Variation 2020-2021 (%)	2017	2020	2021	Variation 2017-2021 (%)	Variation 2020-2021 (%)
AT	1	1	1	0%	0%	1	1	1	0%	0%
BE	2	2	2	0%	0%	1	1	1	0%	0%
BG	10	6	6	-40%	0%	10	6	6	-40%	0%
CY	1	1	1	0%	0%	1	1	1	0%	0%
CZ	2	2	2	0%	0%	2	3	2	0%	-33%
DE	2	3	2	0%	-33%	2	3	2	0%	-33%
DK	2	2	2	0%	0%	-	-	-	-	-
EL	5	6	3	-40%	-50%	9	8	4	-56%	-50%
ES	2	2	4	100%	-50%	2	2	3	50%	50%
FI	-	2	2	-	0%	-	2	2	-	0%
FR	1	1	1	0%	0%	1	1	1	0%	0%
MK	3	11	13	333%	18%	3	16	12	300%	-25%
HR	3	2	2	-33%	0%	3	2	1	-67%	-50%
HU	3	3	1	-67%	-67%	3	3	5	67%	67%
IT	2	2	3	50%	50%	2	2	2	0%	0%
LT	-	5	4	-	-20%	-	4	4	-	0%
LU	-	2	2	-	0%	-	1	1	-	0%
LV	1	1	1	0%	0%	-	1	1	-	0%
MT	1	2	2	100%	0%	9	10	8	-11%	-20%
PL	2	2	2	0%	0%	1	1	2	100%	100%
PT	2	2	2	0%	0%	2	4	4	100%	0%
RO	-	5	5	-	0%	-	9	8	-	-11%
RS	1	1	1	0%	0%	1	1	1	0%	0%
SE	2	2	2	0%	0%	2	2	2	0%	0%
SI	4	6	6	50%	0%	5	6	6	20%	0%
SK	2	2	2	0%	0%	3	2	3	0%	50%

NOTES:

1. AT: incl. letters (domestic and international), newspapers, periodicals, registered mail, insured mail, official documents.
2. BG This is providers in the scope of universal services. Here is include providers of standard parcel service with a maximum of 20kg.
3. CY: Only the USP handles letters.
4. HU: Letter-post items include: items of correspondence (e.g. ordinary letters and postcards, direct mail, registered mail, insured mail) and other letter-post items (books, catalogues, newspapers and periodicals) with a maximum weight of 2 kg. It does not include parcels.

5. *IT: Compared to previous transmission the data of the USP now include those of operators (Nexive mainly for letters and SDA Courier mainly for parcels) that Poste Italiane have recently bought. Therefore, some differences might appear compared to the previous historical series.*
6. *MT: Express data is not very accurate and hence subject to variation.*
7. *NO Since there most likely are several undertakings, providing one or more postal services, that are still not registered with the NRA (and not reporting volumes/revenues to the NRA), we do not find it appropriate to provide measures of the level of market concentration.*
8. *EE, IE, ME, NL, NO, TR: no data for this figure.*

When looking specifically at the parcel postal market volume data for 2020 and 2021, Austria (AT), Belgium (BE), Greece (EL), Spain (ES), Lithuania (LT), Romania (RO) and Slovakia (SK) observed a percentage decrease, even though in absolute terms, this is not significant. On the other hand, in the Czech Republic (CZ), Luxembourg (LU), Latvia (LV), Malta (MT), Poland (PL), Sweden (SE) and Slovenia (SI), there has been an increase. When analysing data based on revenues, it is possible to note that there have been increases in the Czech Republic (CZ), France (FR), Hungary (HU), Luxembourg (LU), Portugal (PT), Sweden (SE) and Slovenia (SI). At the same time, in Austria (AT), Spain (ES) and Romania (RO), there was a percentage decrease in the number of operators with more than 1% market share. Notwithstanding, these variations per country do not seem significant in terms of absolute numbers.

Figure 19 – Number of postal service providers with more than 1% of the Parcel postal market 2017-2021

Country	Based on volumes					Based on revenues				
	2017	2020	2021	Variation 2017-2021 (%)	Variation 2020-2021 (%)	2017	2020	2021	Variation 2017-2021 (%)	Variation 2020-2021 (%)
AT	6	7	6	0%	-14%	8	9	8	0%	-11%
BE	10	10	9	-10%	-10%	12	11	11	-8%	0%
BG	16	14	14	-13%	0%	16	14	14	-13%	0%
CY	-	10	10	-	0%	-	10	10	-	0%
CZ	7	4	5	-29%	25%	6	4	6	0%	50%
DE	7	6	6	-14%	0%	9	9	9	0%	0%
DK	3	3	3	0%	0%	-	-	-	-	-
EL	12	10	9	-25%	-10%	11	10	10	-9%	0%
ES	17	16	14	-18%	-13%	16	17	14	-13%	-18%
FR	9	10	10	11%	0%	9	9	10	11%	11%
HR	12	8	8	-33%	0%	11	8	8	-27%	0%
HU	9	9	9	0%	0%	9	9	11	22%	22%
IT	7	7	7	0%	0%	8	8	8	0%	0%
LT	-	8	7	-	-13%	-	10	10	-	0%
LU	-	7	8	-	14%	-	8	9	-	13%
LV	7	8	9	29%	13%	-	-	-	-	-
MT	7	6	8	14%	33%	10	8	8	-20%	0%
PL	9	7	8	-11%	14%	9	8	8	-11%	0%
PT	9	7	7	-22%	0%	12	9	10	-17%	11%
RO	-	11	10	-	-9%	-	12	11	-	-8%
RS	7	6	6	-14%	0%	9	7	7	-22%	0%
SE	-	9	10	-	11%	-	11	12	-	9%
SI	7	6	7	0%	17%	7	6	7	0%	17%
SK	9	9	8	-11%	-11%	11	10	10	-9%	0%

NOTES

1. *AT: Parcels: domestic and international, up to 31.5 kg*
2. *BG: This is Express and courier services providers.*

3. ES: “In 2021, Amazon’s data has been included for the first time (CNMC resolution: [STP/DTSP/006/20](#) – in Spanish). That explains, in part, the differences between 2020 and 2021 data. “
4. HU: Postal Parcels: items containing merchandise with or without commercial value carried by a postal operator and sent by a standard service with a maximum of 20kg. Parcels also include small packets and are distinct from letter post items. Express and courier (a) items are included as well.
5. IT: Compared to previous transmission the data of the USP now include those of operators (Nexive mainly for letters and SDA Courier mainly for parcels) that Poste Italiane have recently bought. Therefore, some differences might appear compared to the previous historical series.
6. MT: Express data is not very accurate and hence subject to variation.
7. NL: Only detailed information on top 6 operators is available
8. NO: Since there most likely are several undertakings, providing one or more postal services, that are still not registered with the NRA (and not reporting volumes/revenues to the NRA), we do not find it appropriate to provide measures of the level of market concentration.
9. EE, FI, IE, ME, MK, NL, NO, TR: no data for this figure

Figure 20 – Number of PSP with more than 1% of the letter post-market (based on volumes), var. 2017-2021

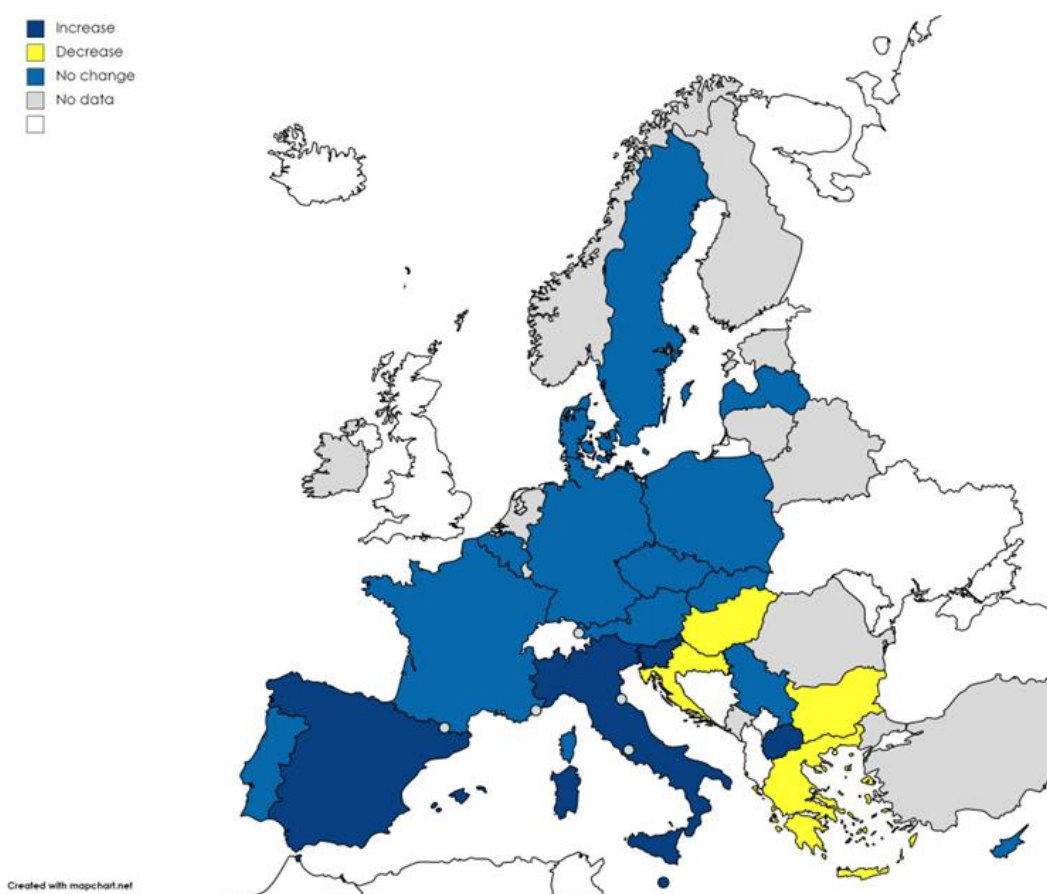


Figure 21 – Number of PSP with more than 1% of the postal letter market (based on revenues), var. 2017-2021

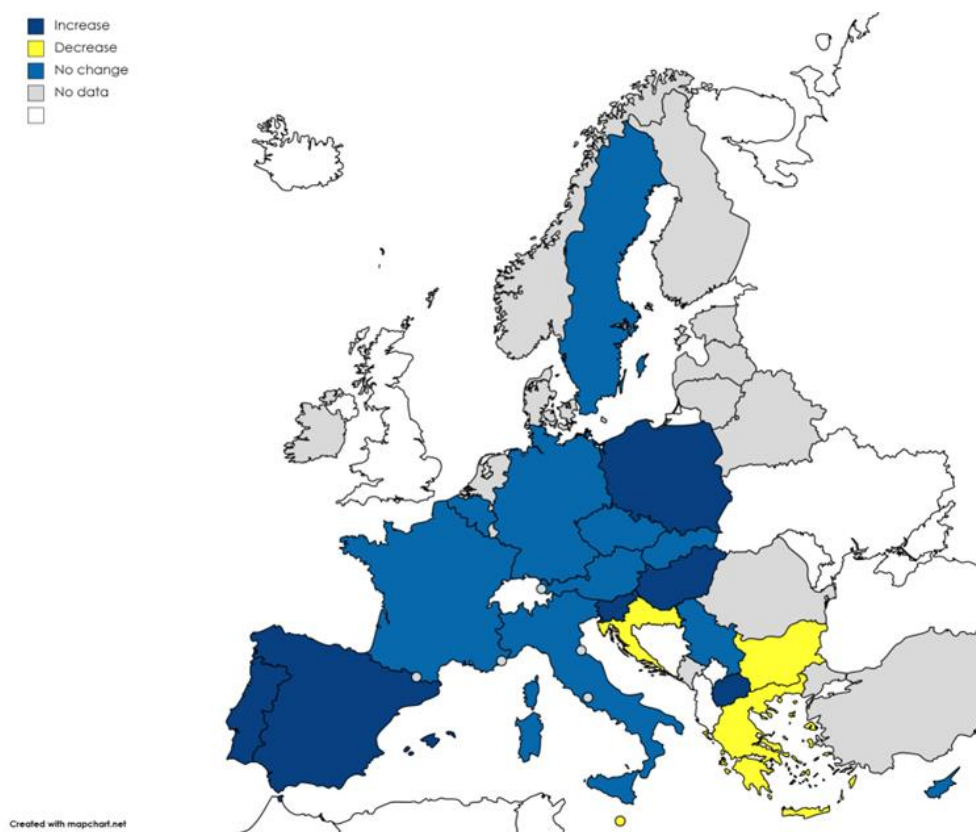


Figure 22 – Number of PSP with more than 1% of the parcel postal market (based on volumes), var. 2017-2021

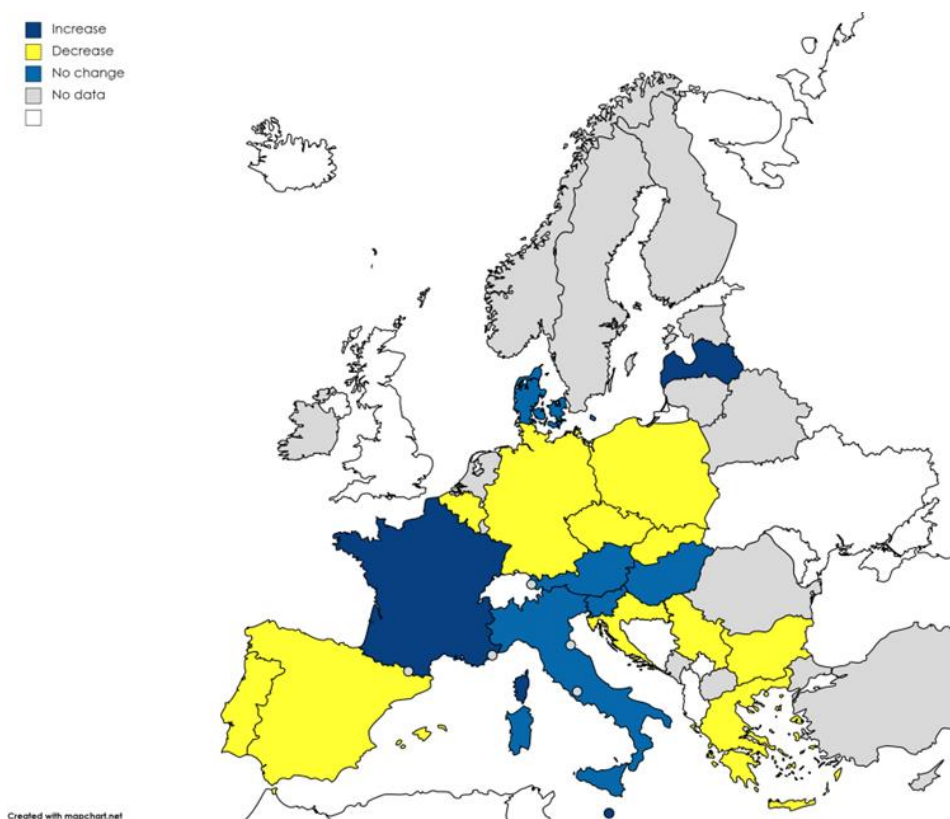


Figure 23 - Number of PSP with more than 1% of the parcel postal market (based on revenues), var. 2017-2021

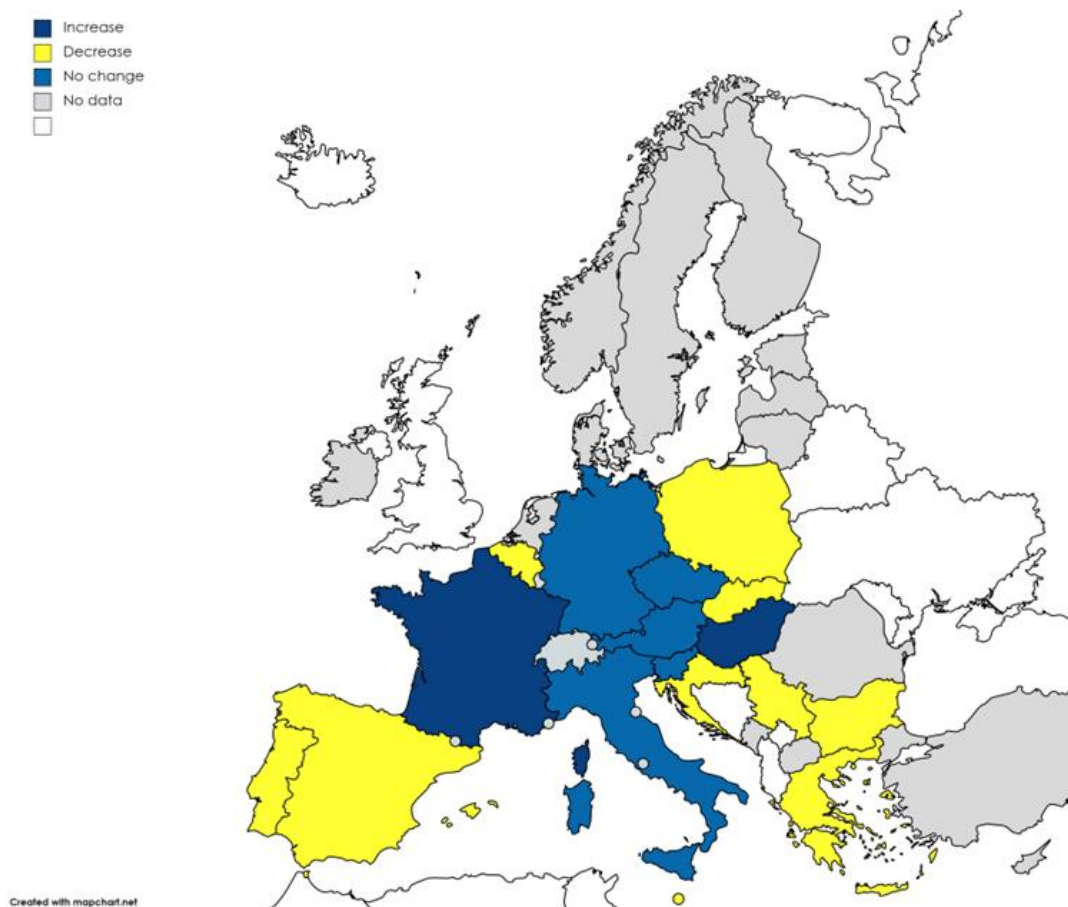


Figure 24– Number of postal service providers with more than 1% of the Letter postal market in 2021

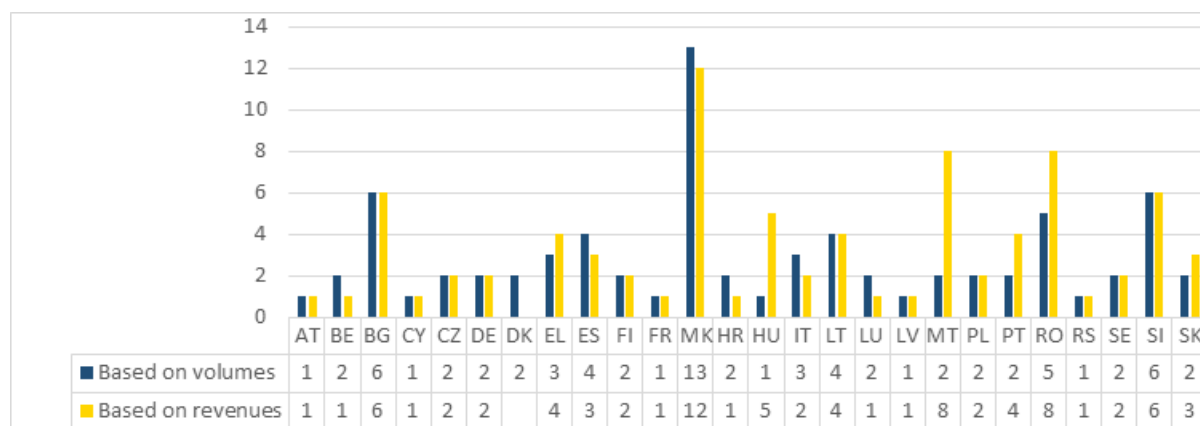
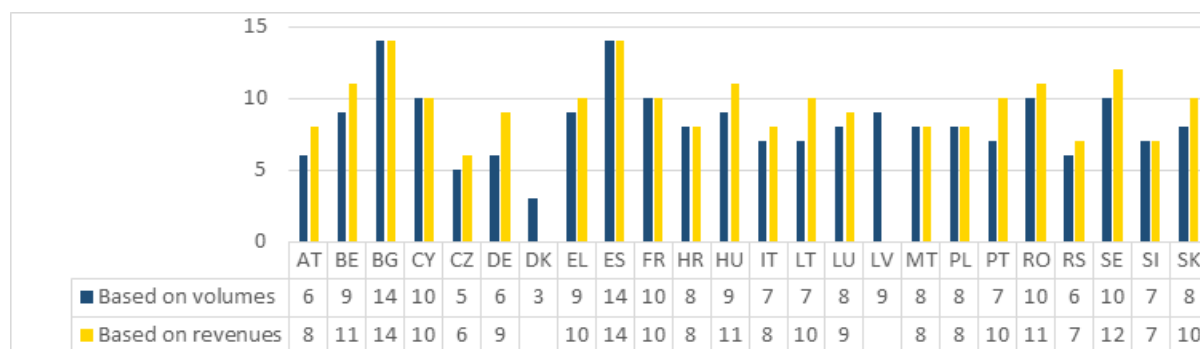


Figure 25 – Number of postal service providers with more than 1% of the Parcel postal market in 2021



NOTES:

1. FR: For data regarding parcels, the scope used in this report changed regarding previous ones. It includes data from both postal providers that have an individual licence granted by Arcep for correspondence and parcel delivery service providers (PDSPs) registered under the parcel Regulation 2018/644 (weight limit is 31,5Kg).
2. ES: “In 2021, Amazon’s data has been included for the first time (CNMC resolution: [STP/DTSP/006/20](#) – in Spanish). That explains, in part, the differences between 2020 and 2021 data. “

4.2.3. USP Market Shares

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

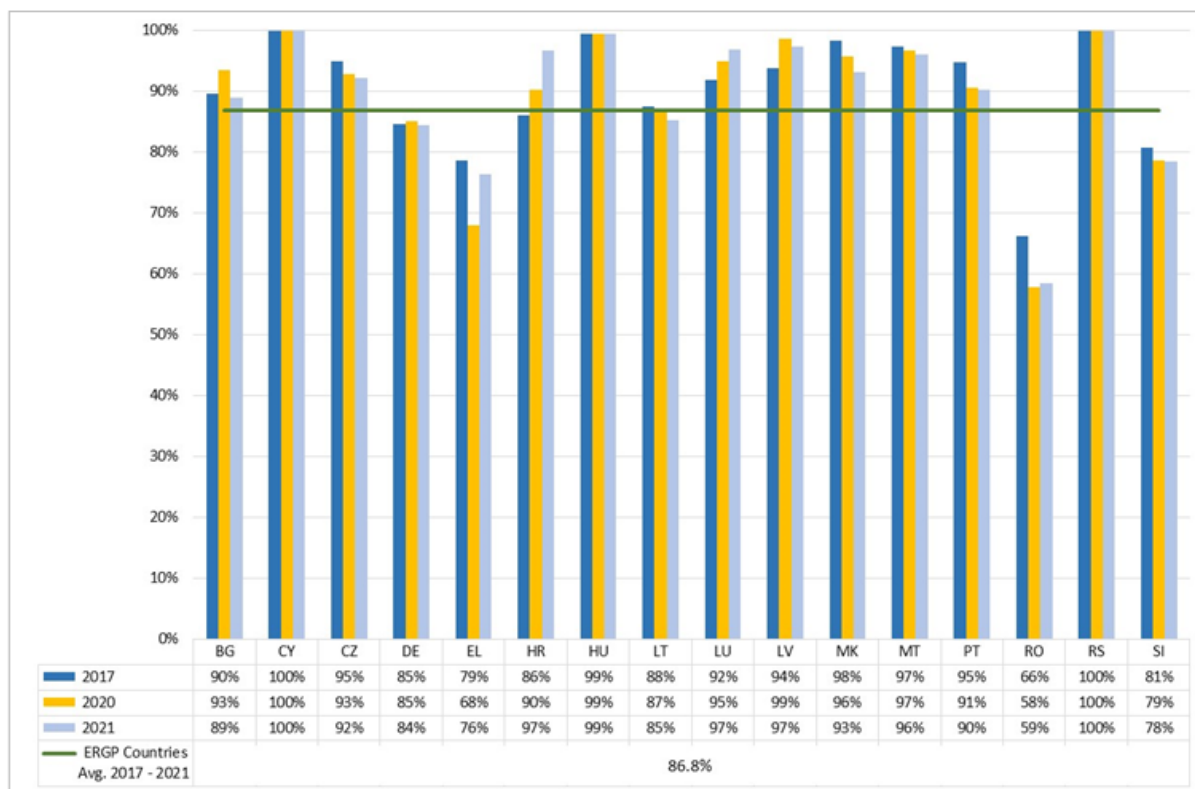
4.2.3.1. USP Volume Market Shares

For those ERGP Member States where information is available, the USP maintains a high market share for letter volumes from 2017 - 2021, on average, a share²¹ of 86.8%. Furthermore, comparing 2021 (88.6%) to 2017 (85.5%), the USP letter volume share increased by 3.1 percentage points.

²¹Average of ERGP countries from 2017 to 2021 excluding AT, DK, ES, FI, FR, ME, NO, SE and TR, as the data is confidential and was not provided.



Figure 26 – USP Volume share for letters



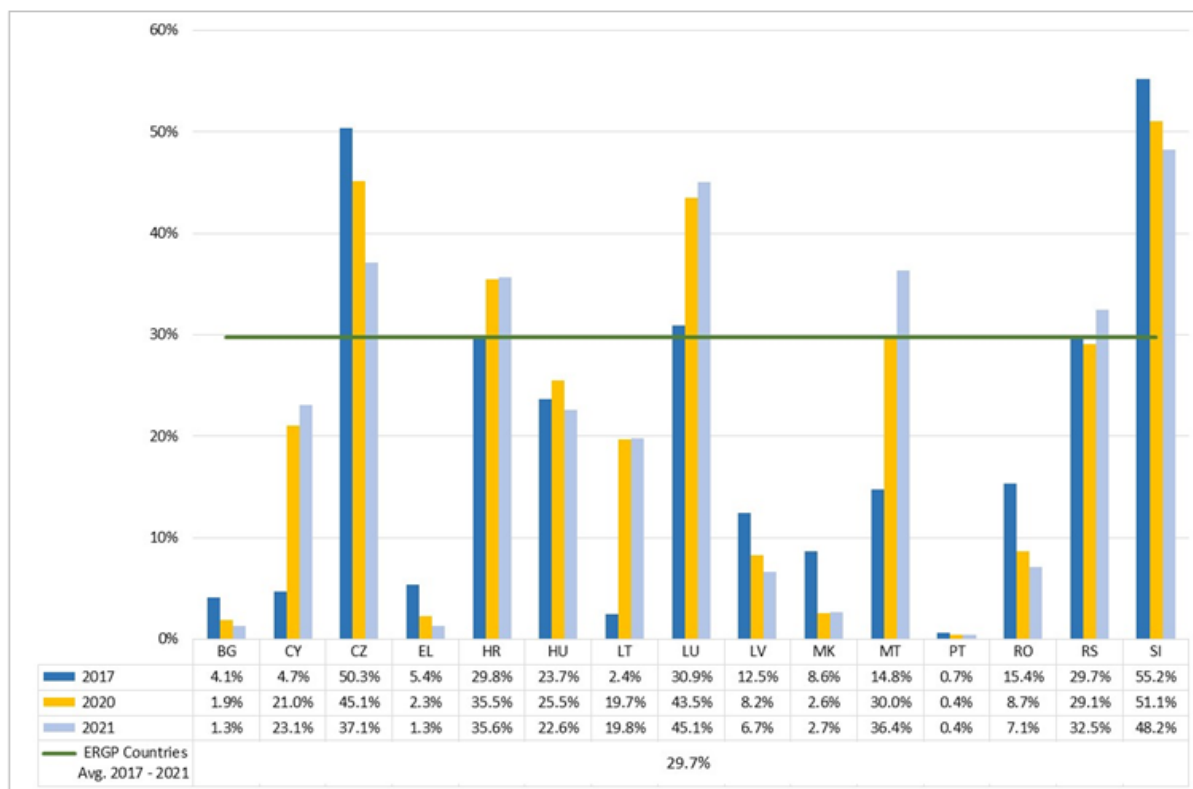
Notes:

- The average 2017 – 2021 includes all countries except the following:
 - AT, DK, ES, FI, FR, ME, NO, SE and TR, since data is not provided due to either being confidential or not available.
- USO data only: CY, IE, RS.
- Confidential / Not available: AT, BE, DK, EE, ES, FI, FR, IT, LU, ME, NO, NL, PL, RS, SE, SK, TR.
- ERGP Estimates:
 - 2021: EE, NL.
- AT: Letters (domestic), newspapers, periodicals, registered mail, insured mail, official documents included in domestic traffic, since no differentiation between domestic/int. is available
- CZ: The definition of postal services (postal items) in the Czech postal legislation is not based on the content of the item but on the weight and the size of the item and the scope of responsibility for loss or damages. Courier services are not included. The courier services are direct delivery without sorting and they are not postal services in the Czech Republic.
- HU: There are no small packets in Hungary, these are handled as letters with the same dimensions.
- IE: Change made to figures to reflect definition. Packets moved from letters to parcels
- LT: Letter-post item includes: 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).
- MT: Includes small packets and bulk mail.
- PL: Postal orders are included.
- SK: The limit for letters is: maximum dimension $x+y+z =$ maximum 90 cm. The biggest size cannot exceed 60 cm. Some small packets are included in letters. and are not distinct from letter post items. The minimum parcel size is 200mm x 150 mm. If an item fits both descriptions (parcel or letter), it is up to the customer to choose the product.

The USPs parcel market share is relatively low, on average²² around 29.7% for 2017 - 2021. However, comparing 2017 to 2021, the parcel market share decreased from 30.5% to 25.7%.

²² Average of ERGP countries excluding AT, DE, DK, ES, FI, FR, ME, NO, SE and TR, as the data is confidential and was not provided.

Figure 27 – USP Volume share for parcels



Notes:

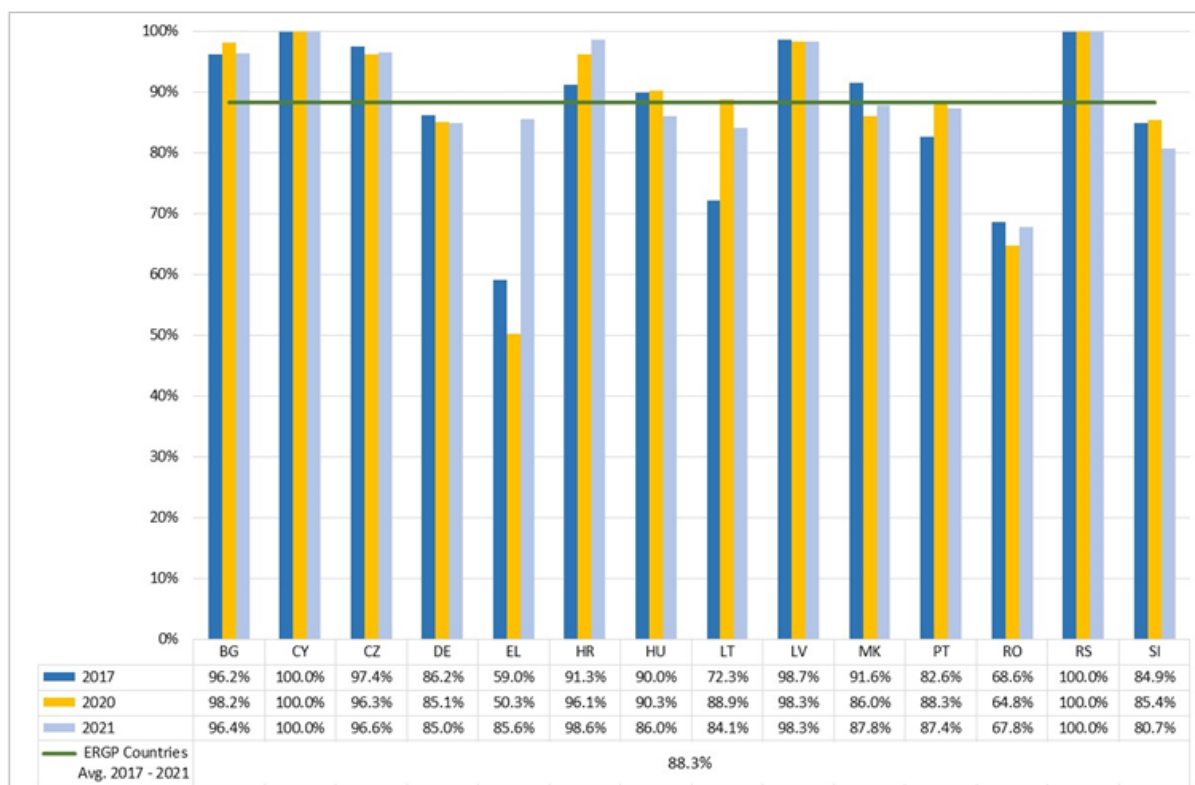
- The average 2017 – 2021 includes all countries except the following:
 - AT, DE, DK, ES, FI, FR, ME, NO, SE and TR, since data is not provided due to either being confidential or not available.
- USO data only: IE.
- Confidential or not available: AT, BE, DE, DK, EE, ES, FI, FR, IT, LU, ME, NL, NO, PL, SE, SK, TR
- ERGP Estimates:
 - 2021: EE, NL.
- Weight Limit:
 - No weight limit: LV, MT, ES
 - AT: The data include parcels up to 31.5 kg, with no differentiation between <20 kg and up to 31.5 kg parcels available.
 - CZ, IE: 10kg for Universal Service.
 - BE: Some operators have parcel weight above 31,5kg
 - HU: Domestic non-US parcel weight limit is 40 kgs.
 - LT: The weight limit is 50 kg for parcels outside the Universal Service.
 - RS: There is no limit in kg for parcels non-US.
 - SK: US domestic and international outbound parcels only up to 10 kg, international inbound up to 20 kg. Parcels outside the US (non-US parcels) up to 50 kg.
- AT: Letters (domestic), newspapers, periodicals, registered mail, insured mail, official documents included in domestic traffic, since no differentiation between domestic/int. is available
- CZ: The definition of postal services (postal items) in the Czech postal legislation is not based on the content of the item but on the weight and the size of the item and the scope of responsibility for loss or damages. Courier services are not included. The courier services are direct delivery without sorting and they are not postal services in the Czech Republic.
- DE: Due to unpredictable subsequent deliveries of the 2020 data on the parcel market in Germany by some PDSP, the data has been updated.
- HU: There are no small packets in Hungary, these are handled as letters with the same dimensions.
- IE: Change made to figures to reflect definition. Packets moved from letters to parcels
- LT: Letter-post item includes: 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).
- MT: Includes small packets and bulk mail.
- PL: Postal orders are included.
- SK: The limit for letters is: maximum dimension $x+y+z = \text{maximum } 90 \text{ cm}$. The biggest size cannot exceed 60 cm. Some small packets are included in letters and are not distinct from letter post items. The parcel minimum size is 200mm x 150 mm. If an item fits both descriptions (parcel or letter), it is up to the customer to choose the product.



4.2.3.2. USP Revenues Market Shares

The USPs' share of letter revenues for 2021 was 89.3%²³, 1.6 percentage points more than in 2017. In 2021, the USP gained more share in Croatia (HR), Czechia (CZ), Greece (EL), Luxembourg (LU), North Macedonia (MK) and Romania (RO) when compared to 2020, with percentages varying up to 35.3²⁴ percentage points.

Figure 28 – USP Revenue Market Shares for Letters



Notes:

- The average 2017 – 2021 includes all countries except the following:
 - AT, DK, ES, FI, FR, ME, NO, SE and TR, since data is not provided due to either being confidential or not available.
- USO data only: CY, IE, RS.
- Confidential or not available: AT, BE, DK, EE, ES, FI, FR, IT, LU, MT, NL, NO, PL, SE, SK, TR.
- ERGP Estimates:
 - 2021: EE, LV, NL.
- AT: Letters (domestic), newspapers, periodicals, registered mail, insured mail, official documents included in domestic traffic, since no differentiation between domestic/int. is available
- CZ: The definition of postal services (postal items) in the Czech postal legislation is not based on the content of the item but on the weight and the size of the item and the scope of responsibility for loss or damages. Courier services are not included. The courier services are direct delivery without sorting and they are not postal services in the Czech Republic.
- HU: There are no small packets in Hungary, these are handled as letters with the same dimensions.
- IE: Change made to figures to reflect definition. Packets moved from letters to parcels
- LT: Total revenues also include revenues from unaddressed mail and revenues from other activities related to postal service. Letter-post item includes: 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).
- MT: Includes small packets and bulk mail.

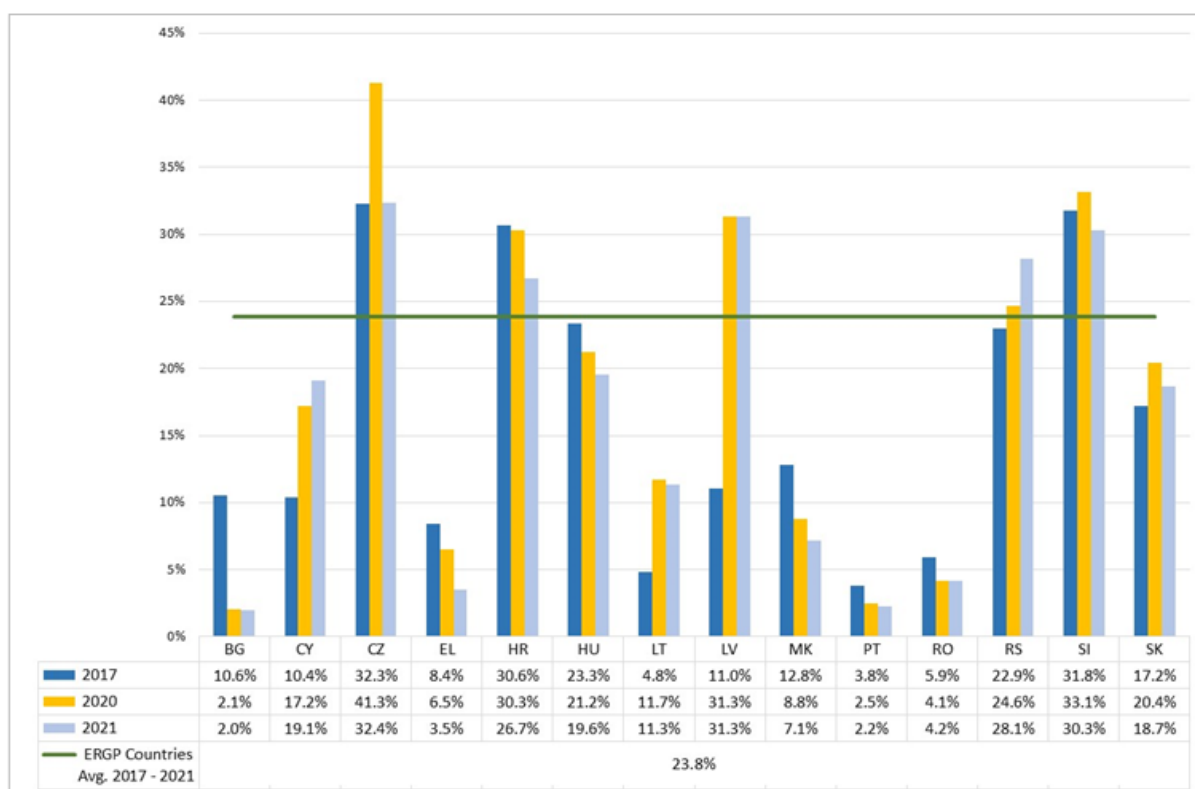
²³ Excluding AT, DK, ES, FI, FR, ME, NO, SE and TR, as the data is confidential and was not provided.

²⁴ Figure in text and in chart due not agree due to rounding.

11. PL: Postal orders are included.
12. SK: The limit for letters is: maximum dimension $x+y+z =$ maximum 90 cm. The biggest size cannot exceed 60 cm. Some small packets are included in letters. and are not distinct from letter post items. The parcel minimum size is 200mm x 150 mm. If an item fits both descriptions (parcel or letter), it is up to the customer to choose the product.

The USP share of parcel revenues is far more variable in the countries where data is available than in letters. The average USP parcel revenue market share between 2017 and 2021 was 23.8%. However, in 2021, the market share was 22.1%, a decrease of 1.2 percentage points compared with 2017. This indicates that most ERGP countries are losing their share of USP parcel revenues when comparing 2021 to 2017, which varies up to 8.6 per cent.

Figure 29 – USP Revenue Market Share for Parcels



Notes:

1. The average 2017 – 2021 includes all countries except the following:
 - a. AT, DE, DK, ES, FI, FR, ME, MK, NO, SE and TR, since data is not provided due to either being confidential or not available.
2. USO data only: IE.
3. Confidential or not available: AT, BE, CY, DE, DK, EE, ES, FI, FR, IT, LU, MT, NL, NO, PL, SE, TR.
4. ERGP Estimates:
 - a. 2021: EE, EL, LV, NL.
5. Weight Limit:
 - a. No weight limit: LV, MT, ES
 - b. AT: The data include parcels up to 31.5 kg, with no differentiation between <20 kg and up to 31.5 kg parcels available.
 - c. BE: Some operators have parcel weight above 31.5kg
 - d. CZ, IE: 10kg for Universal Service.
 - e. HU: Domestic non-US parcel weight limit is 40 kgs.
 - f. LT: The weight limit is 50 kg for parcels outside the Universal Service.
 - g. RS: There is no limit in kg for parcels non-US.
 - h. SK: US domestic and international outbound parcels only up to 10 kg, international inbound up to 20 kg. Parcels outside the US (non-US parcels) up to 50 kg.
6. AT: Letters (domestic), newspapers, periodicals, registered mail, insured mail, official documents included in domestic traffic, since no differentiation between domestic/int. is available
7. CZ: The definition of postal services (postal items) in the Czech postal legislation is not based on the content of the item but on the weight and the size of the item and the scope of responsibility for loss or damages. Courier services are not included. The courier

services are direct delivery without sorting and they are not postal services in the Czech Republic.

8. *DE: Due to unpredictable subsequent deliveries of the 2020 data on the parcel market in Germany by some PDSPs, the data has been updated.*
9. *HU: There are no small packets in Hungary, these are handled as letters with the same dimensions.*
10. *IE: Change made to figures to reflect definition. Packets moved from letters to parcels*
11. *LT: Total revenues also include revenues from unaddressed mail and revenues from other activities related to postal service. Letter-post item includes: 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).*
12. *MT: Includes small packets and bulk mail.*
13. *PL: Postal orders are included.*
14. *SK: The limit for letters is: maximum dimension $x+y+z$ = maximum 90 cm. The biggest size cannot exceed 60 cm. Some small packets are included in letters. and are not distinct from letter post items. The parcel minimum size is 200mm x 150 mm. If an Item fits both descriptions (parcel or letter), it is up to the customer to choose the product.*

4.3. Volumes

4.3.1. Volume Trends

Over the past years, total traffic volumes across ERGP countries have been declining, although it was noticed that when comparing 2021 to 2020, there was an increase of 0.56%. The average decrease from 2017 was 3.5% (approximately eight (8) billion items). This decline is due to letter mail volumes, which on average, dropped 7.1% (around 13 billion items). In contrast, parcels increased by approximately 16.0% (nearly five (5) billion items).

Figure 30: Total Postal Volumes and the percentage change 2020-2021 and 2017-2021

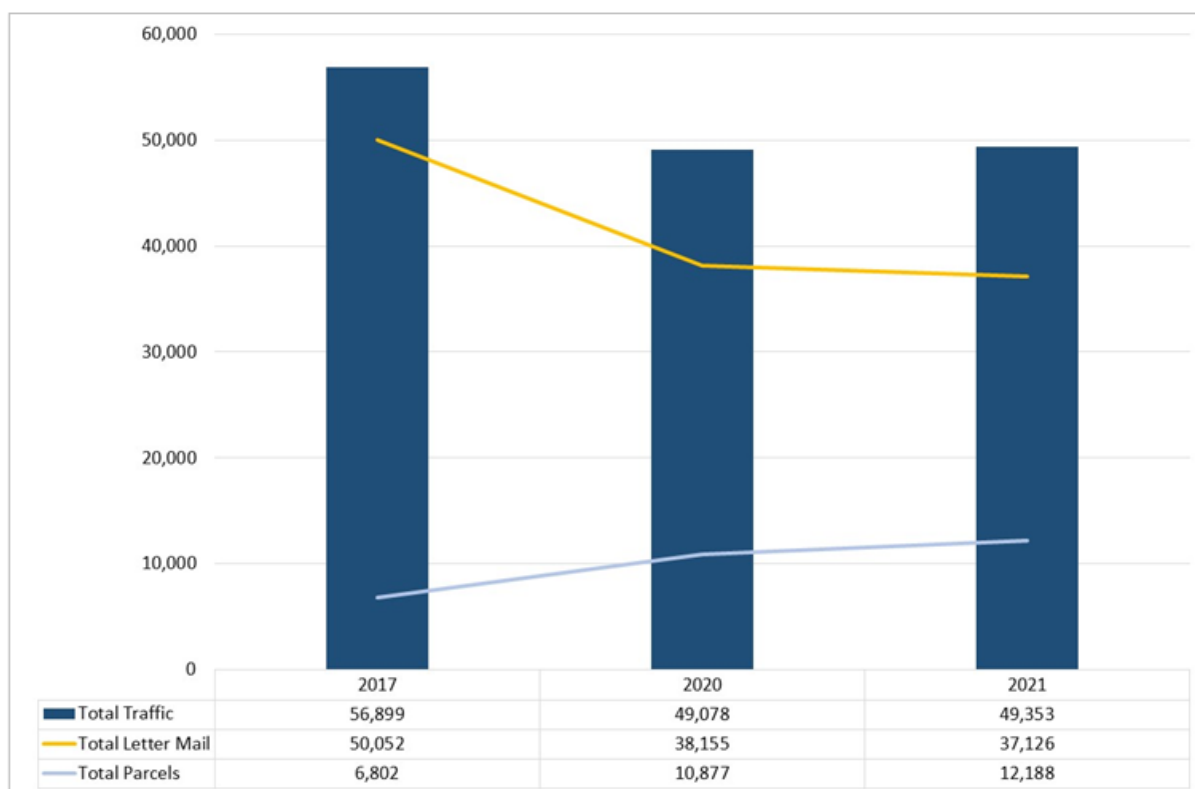
	2017 (in millions)	2020 (in millions)	2021 (in millions)	Percentage change 2020 - 2021	Average Percentage change 2017 - 2021
Total Traffic	56,899	49,078	49,353	+ 0.6%	-3.5%
Total Letter Mail	50,052	38,155	37,126	-2.7%	-7.1%
Total Parcels	6,802	10,877	12,188	+12.1%	+16.0%

Notes:

1. *The summation of Total Letter and Total Parcels does not tally with Total Traffic.*
 - a. *This is due to MK and PL having the Total Traffic higher than the addition of Letters and Parcels.*
 - i. *PL: Total traffic also includes data on postal money orders and electronic items.*
 - b. *Includes all countries except DK, FI, ME, NO, and TR, .to be able to compare the data for revenues and volumes.*
2. *Letters:*
 - a. *Confidential or not available: EE, ME, NO, SK, TR.*
 - b. *USO data only: IE, RS*
 - c. *ERGP Estimates for:*
 - i. *2021: EE, NL, SE.*
3. *Parcels:*
 - a. *Confidential or not available: EE, ME, NL, NO, SK, TR*
 - b. *USO data only: IE*
 - c. *ERGP Estimates for:*
 - i. *2021: EE, NL, SE.*
 - ii. *2017: SE*
4. *Parcel Weight Limit:*
 - a. *No weight limit: LV, MT, ES*
 - b. *AT: The data include parcels up to 31.5 kg, with no differentiation between <20 kg and up to 31.5 kg parcels available.*
 - c. *BE: Some operators have parcel weight above 31.5kg*
 - d. *CZ, IE: 10kg for Universal Service.*
 - e. *HU: Domestic non-US parcel weight limit is 40 kgs.*
 - f. *LT: The weight limit is 50 kg for parcels outside the Universal Service.*
 - g. *RS: There is no limit in kg for parcels non-US.*
 - h. *SK: US domestic and international outbound parcels only up to 10 kg, international inbound up to 20 kg. Parcels outside the US (non-US parcels) up to 50 kg.*
5. *AT: Letters (domestic), newspapers, periodicals, registered mail, insured mail, official documents included in domestic traffic, since no differentiation between domestic/int. is available*
6. *BG: Break in series: As of 2020, express and courier services are included with the parcels.*
7. *CZ: The definition of postal services (postal items) in the Czech postal legislation is not based on the content of the item but on the weight and the size of the item and the scope of responsibility for loss or damages. Courier services are not included. The courier services are direct delivery without sorting and they are not postal services in the Czech Republic.*
8. *DE: Due to unpredictable subsequent deliveries of the 2020 data on the parcel market in Germany by some PDSPs, the data has been updated.*
9. *EL: Break in series as of 2021: Providers with General License Courier data are all included under parcels.*
10. *ES: In 2021, Amazon's data has been included for the first time (CNMC resolution: STP/DTSP/006/20 – in Spanish). That explains, in part, the differences between 2020 and 2021 data.*

11. HU: There are no small packets in Hungary, these are handled as letters with the same dimensions.
12. IE: Change made to figures to reflect definition. Packets moved from letters to parcels
13. LT: Total revenues also include revenues from unaddressed mail and revenues from other activities related to postal service. Letter-post item includes: 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).
14. MT: Includes small packets and bulk mail.
15. PL: Postal orders are included.
16. SK: The limit for letters is: maximum dimension $x+y+z =$ maximum 90 cm. The biggest size cannot exceed 60 cm. Some small packets are included in letters. and are not distinct from letter post items. The parcel minimum size is 200mm x 150 mm. If an Item fits both descriptions (parcel or letter), it is up to the customer to choose the product.

Figure 31: Total Postal Volumes 2017, 2020, and 2021 (in millions)



Notes:

1. Please refer to the notes in Figure 30.

These past two years, the postal sector has faced quite some challenges. In 2020, apart from the Covid-19 pandemic, there was also Brexit, and as of 1st July, the inclusion of VAT on goods worth less than €22 imported from non-EU countries. Hence, NRAs were asked to provide an estimate or understanding of the impact of Brexit and Customs and VAT e-commerce. In view of the impact of Brexit, five (5) countries provided the following comments:

- the changes were not significant.
- the Regulatory Authority does not collect information by country, but the number of international letters sent and received has decreased, which may have been affected by Brexit.

- there was a considerable drop in the market, especially for the USP, and some small companies have since stopped offering the PAFS service.
- not enough data is available to distinguish an impact due to Brexit.

As for the impact of the introduction of e-commerce Customs and VAT, six (6) countries offered the following comments:

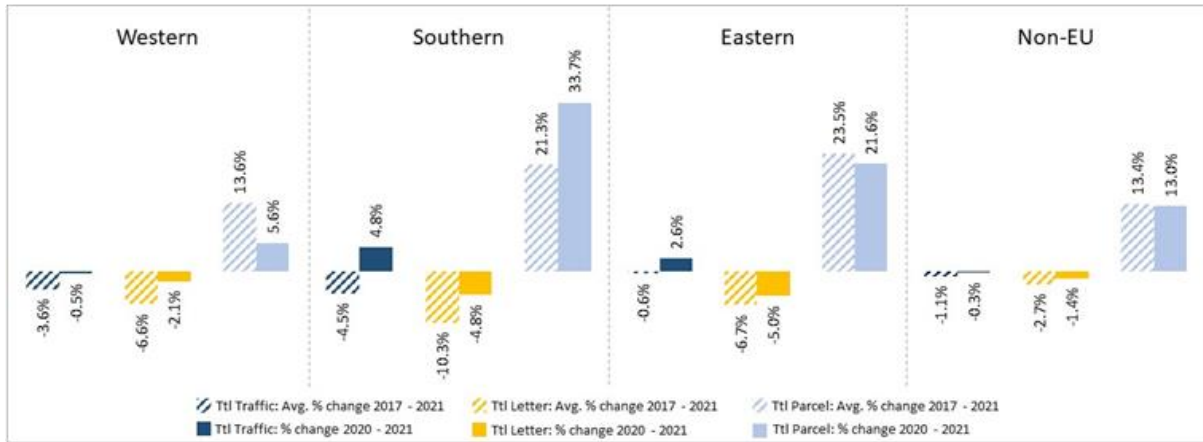
- Limited or non-existent.
- Items worth below 150 EUR are not subject to customs duty, and recipients will only pay VAT (20%) and the price for the services provided by Bulgarian Posts – Customs Representation, delivery of items with a single power of attorney, etc.
- The number of small parcels decreased.
- The number of international inbound letters and parcels (extra-EU) received decreased, which may have been affected by the introduction of Customs and VAT e-commerce consignments from 2021 July 1.
- There was a considerable drop in the market, especially for the USP. Some small companies have since also stopped offering the PAFS service.
- not enough data is available to distinguish an impact due to the introduction of e-commerce Customs and VAT.

Other countries stated that such information is not available.

The chart below (figure 32) compares the market trend percentage change from 2020 to 2021 and the average percentage change from 2017 to 2021. The diagram indicates that the letter mail volumes, on average, are decreasing yearly in all regions. The Eastern region saw the steepest decline when comparing 2021 to 2020, followed by the Southern region.

When observing the parcel trend, each region reflected an improvement but with a different degree of growth. The growth between 2020 and 2021 varied from 5.6% to 33.7%, whereas the increase between 2017 and 2021 ranged between 13.4% and 23.5%.

Figure 32: Total Volumes – percentage change 2017-2021 and 2020-2021

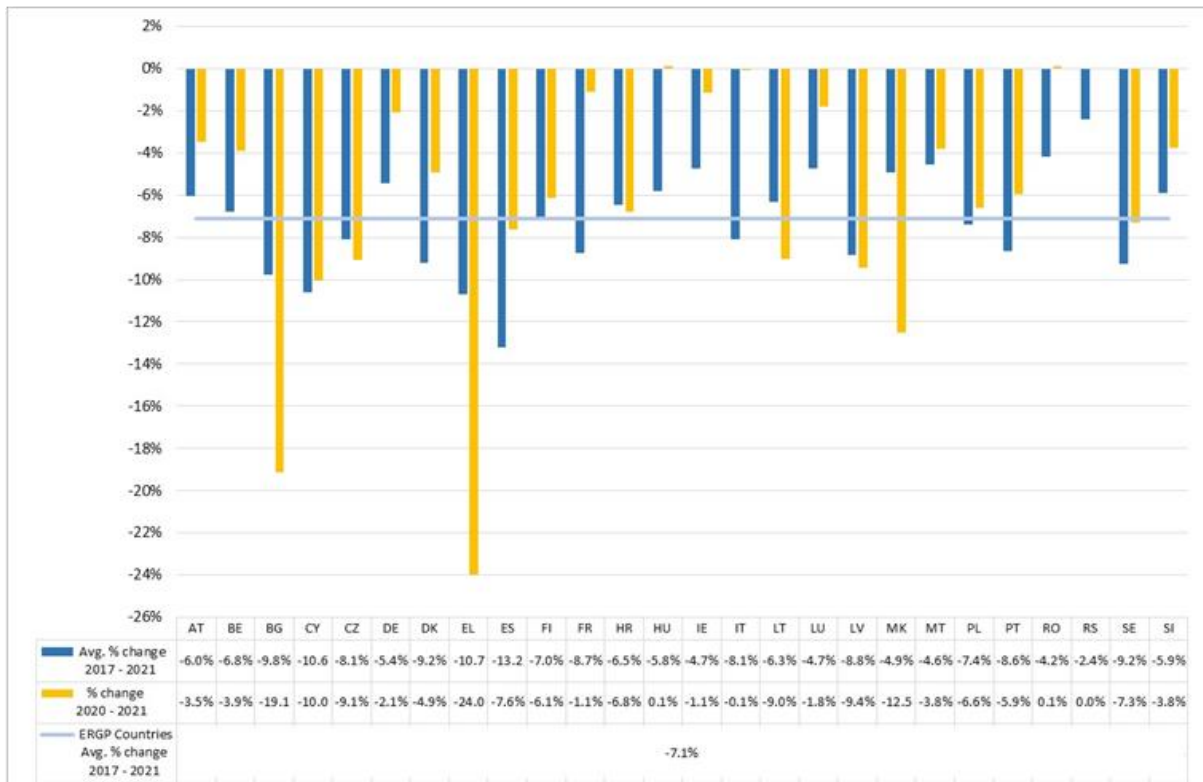


Notes:

1. Please refer to the notes in Figure 30.

As pointed out, letter mail volumes registered a drop in every country, apart from Hungary (HU) and Romania (RO), which both reported an increase of 0.1% when comparing 2020 to 2021. The rest of the countries' reflected volume decreases up to 24.0%.

Figure 33: Total Letter Volumes – percentage change



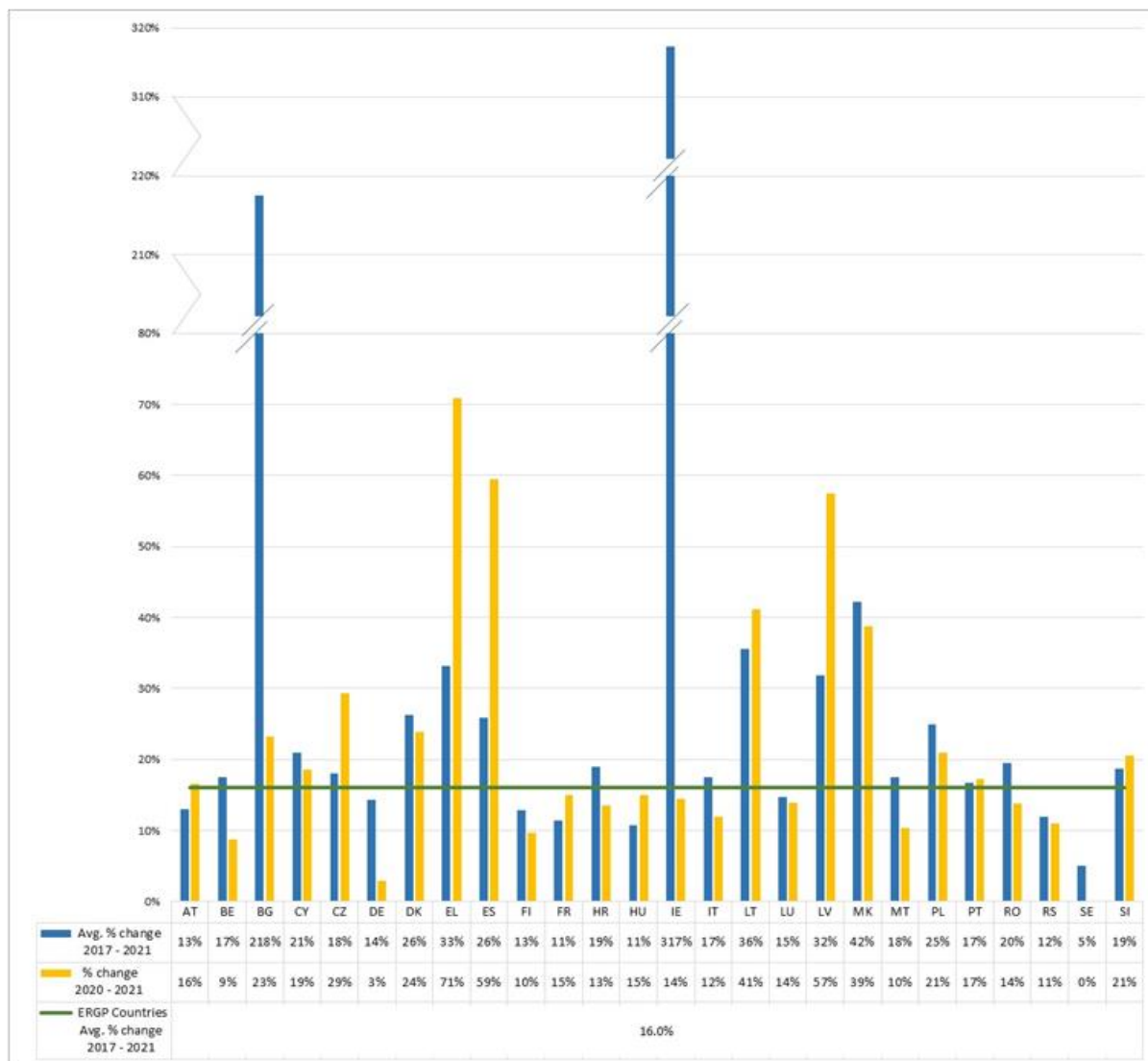
Notes:

1. Please refer to the notes in Figure 30.
2. The average 2017 – 2021 includes all countries except the following:
 - a. DK, FI, ME, NO, and TR, since data is not provided due to either being confidential, not available or to be comparable with the revenues.
3. USO data only: IE, RS.
4. Confidential: EE, ME, NL, NO, SK, TR

5. BG: Break in series: As of 2020, express and courier services are included with the parcels.
6. EL: Break in series as of 2021: Providers with General License Courier data are all included under parcels.
7. IE: Break in series as of 2020: Packets moved from letters to parcels.

As stated, the parcel market is flourishing, with a growth of 12.1% between 2020 and 2021. This growth varies from 2.9% to 70.9% and is experienced in all countries.

Figure 34: Total Parcel Volumes – percentage change



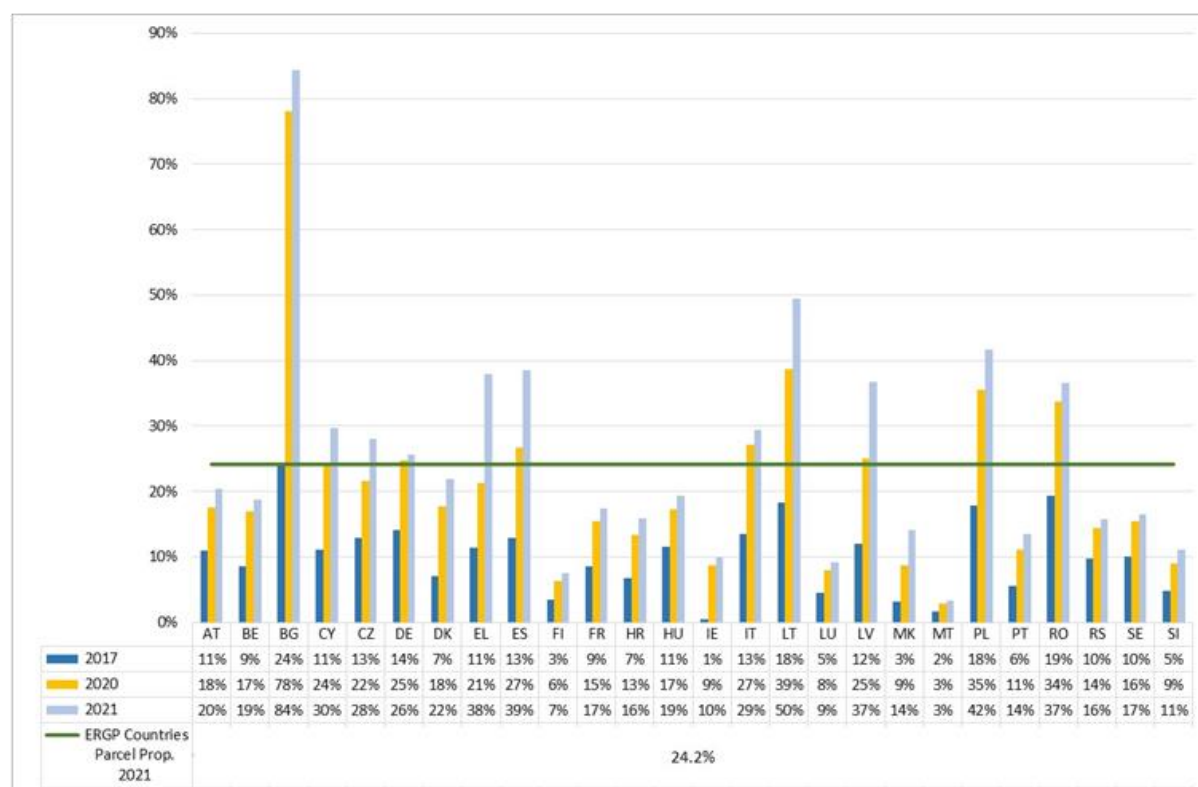
Notes:

1. Please refer to the notes in Figure 30.
2. The average 2017 – 2021 includes all countries except the following:
 - a. DK, FI, ME, NO, and TR, since data is not provided due to either being confidential, not available or to be comparable with the revenues.
3. USO data only: IE.
4. Confidential or not available: EE, ME, NL, NO, SK, TR
5. BG: Break in series: As of 2020, express and courier services are included with the parcels.
6. DE: Due to unpredictable subsequent deliveries of the 2020 data on the parcel market in Germany by some PDSPs, the data has been updated.
7. EL: Break in series as of 2021: Providers with General License Courier data are all included under parcels.
8. ES: In 2021, Amazon’s data has been included for the first time (CNMC resolution: STP/DTSP/006/20 – in Spanish). That explains, in part, the differences between 2020 and 2021 data.
9. IE: Break in series as of 2020: Packets moved from letters to parcels.

4.3.2. The proportion of postal item volumes

Given the drop in letter mail volumes and growth in parcel volumes, the increase in parcel proportion in the total traffic volume is no surprise. In 2017, the ERGP countries' average proportion of parcels (of the total traffic) stood at 11.6%, incrementing on average by 12.6 percentage points, reaching 24.2% in 2021.

Figure 35: Proportion of Parcels in Total Traffic

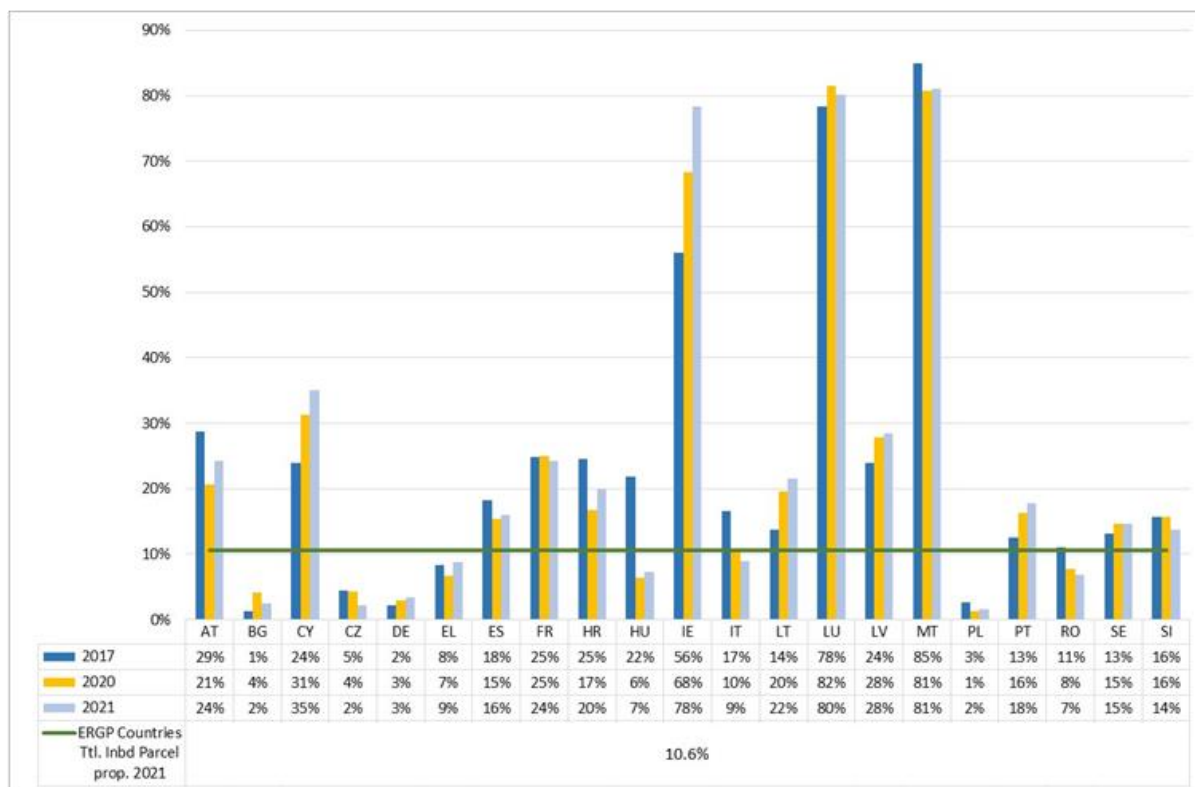


Notes:

1. Please refer to the notes in Figure 30.
2. USO data only: IE.
3. Confidential: EE, ME, NL, NO, SK, TR
4. BG: Break in series: As of 2020, express and courier services are included with the parcels.
5. DE: Due to unpredictable subsequent deliveries of the 2020 data on the parcel market in Germany by some PDSPs, the data has been updated.
6. EL: Break in series as of 2021: Providers with General License Courier data are all included under parcels.
7. ES: In 2021, Amazon's data has been included for the first time (CNMC resolution: STP/DTSP/006/20 – in Spanish). That explains, in part, the differences between 2020 and 2021 data.
8. IE: Break in series as of 2020: Packets moved from letters to parcels.

The chart below shows the proportion of inbound parcels within the total parcel volume for the countries that could provide such data split. The 2021 proportion varies from 1.6% to 81.0%, with Malta (MT) registering the highest proportion of inbound parcels, followed by Luxembourg (LU) at 80.1%. The ERGP Countries' share of inbound parcels average for 2021 stands at 10.6%, 0.5 percentage points more than in 2020. Throughout these last two years, the postal market passed from various challenges, as mentioned previously, reflecting on the cross-border flows.

Figure 36: Proportion of Inbound Parcels from Total Parcels

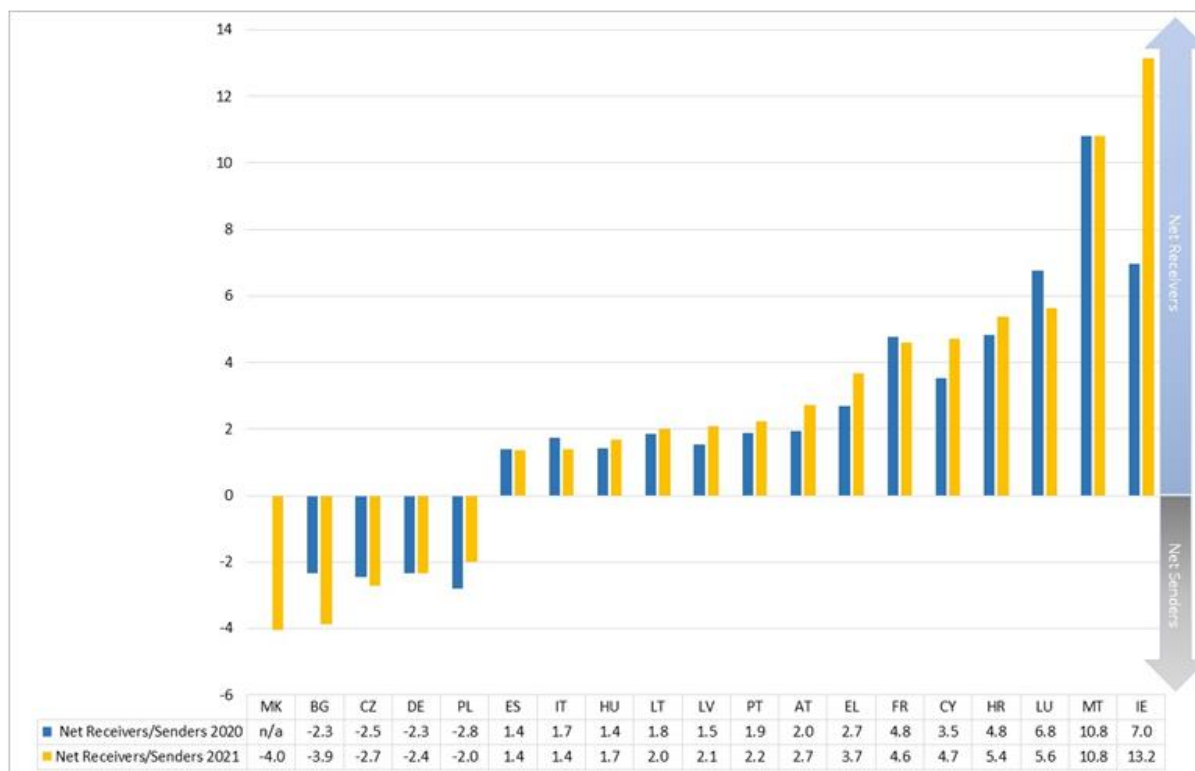


Notes:

1. Please refer to the notes in Figure 30.
2. Confidential or not available: BE, DK, EE, FI, ME, MK, NL, NO, RS, SK, TR.
3. USO only: IE.
4. ERGP Estimates for Total Parcels
 - a. 2021: EE, SE
 - b. 2017: SE
5. ERGP Estimates for Inbound Parcels:
 - a. 2021: EE, NL, SE
 - b. 2017: CY, SE
6. BG: Break in series: As of 2020, express and courier services are included with the parcels.
7. DE: Due to unpredictable subsequent deliveries of the 2020 data on the parcel market in Germany by some PDSPs, the data has been updated.
8. EL: Break in series as of 2021: Providers with General License Courier data are all included under parcels.
9. IE: Break in series as of 2020: Packets moved from letters to parcels.

Given the country-specific distribution, it is 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 37: Ratio between parcel receivers and senders



Notes:

1. *Inbound and Outbound parcels:*
 - a. *Confidential or not available: BE, DK, EE, FI, ME, NL, NO, RO, RS, SE, SI, SK, TR*
2. *BG: Break in series: As of 2020, express and courier services are included with the parcels.*
3. *DE: Due to unpredictable subsequent deliveries of the 2020 data on the parcel market in Germany by some PDSPs, the data has been updated.*
4. *IE: Break in series as of 2020: Packets moved from letters to parcels.*
5. *EL: Break in series as of 2021: Providers with General License Courier data are all included under parcels.*

4.3.3. Volumes per capita

Another aspect analysed is the total volume per capita, which provides insight into mail flow for each individual. In 2021, a drop in volumes per capita was registered for 16 countries out of 27²⁵ and varied between 0.1% and 14.4%. From 2017 to 2021, the volume per capita average drop was 3.5% (approximately 17 items per capita), which is mainly due to letter mail volumes, which fell, on average, by 7.2% (around 30 letter mail per capita) while parcels increased, on average, by 15.9% (nearly 12 parcels per capita).

²⁵ Although there are 33 ERGP countries, not all of them are able to provide the requested data, with the consequence that these countries had to be left out of the analysis for comparability and analysis reasons.

Figure 38: Total Annual Postal Volumes per capita and the percentage change 2020-2021 and 2017-2021

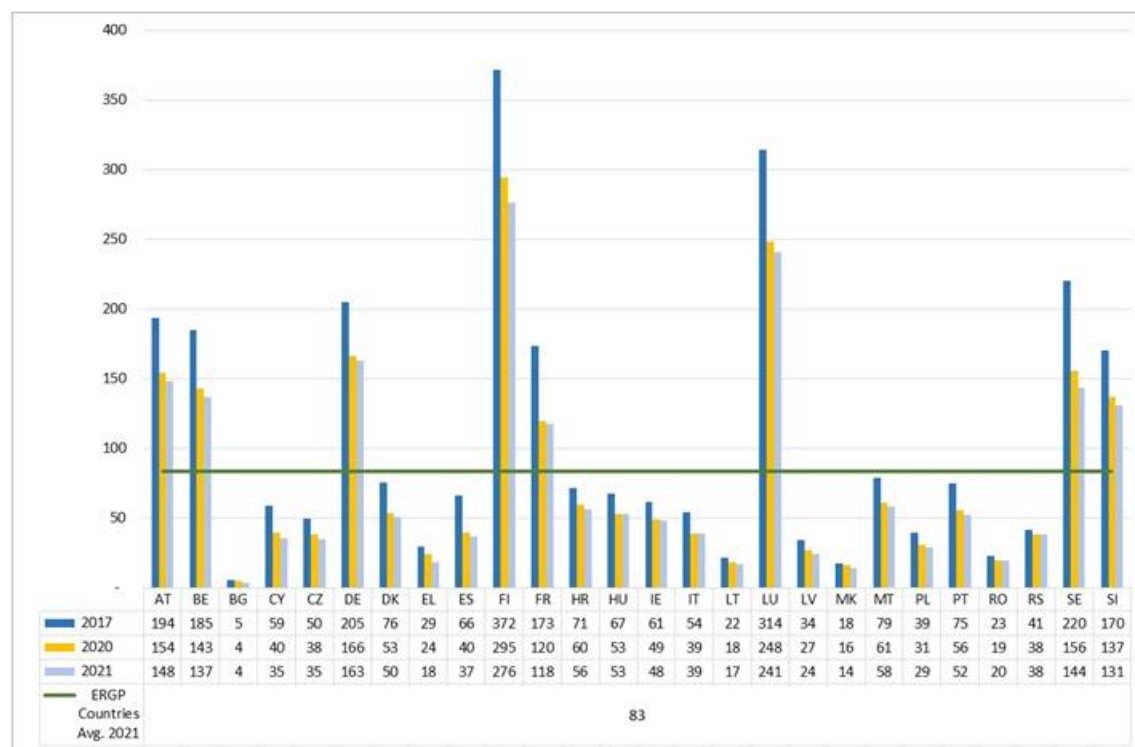
	2017	2020	2021	Percentage change 2020 - 2021	Average percentage change 2017-2021
Total Traffic	128	110	111	+ 0.6%	-3.5%
Total Letter Mail	113	86	83	-2.7%	-7.2%
Total Parcels	15	24	27	+ 12.1%	+ 15.9%

Notes:

1. Population source: Eurostat as at 22/06/2022²⁶
2. Please refer to the notes in Figure 30.
3. BG: Break in series: As of 2020, express and courier services are included with the parcels.
4. DE: Due to unpredictable subsequent deliveries of the 2020 data on the parcel market in Germany by some PDSPs, the data has been updated.
5. IE: Break in series as of 2020: Packets moved from letters to parcels.
6. EL: Break in series as of 2021: Providers with General License Courier data are all included under parcels.

Comparing 2021 to 2020, letter mail volumes per capita continue to decrease in all the countries except for four (4) countries²⁷; Hungary (HU), Italy (IT), Romania (RO) and Serbia (RS). As shown in the figure below, Finland (FI) has the highest per capita letter mail, with values per capita being approximately three (3) times as much as the 2021 ERGP Countries' average per capita, followed by Luxembourg (LU).

Figure 39: Total Letter Volume per capita



²⁶ Population source: Eurostat as at 22/06/2022

https://ec.europa.eu/eurostat/databrowser/view/demo_pjan/default/table?lang=en

²⁷ Figure in text and in chart due not agree due to rounding.

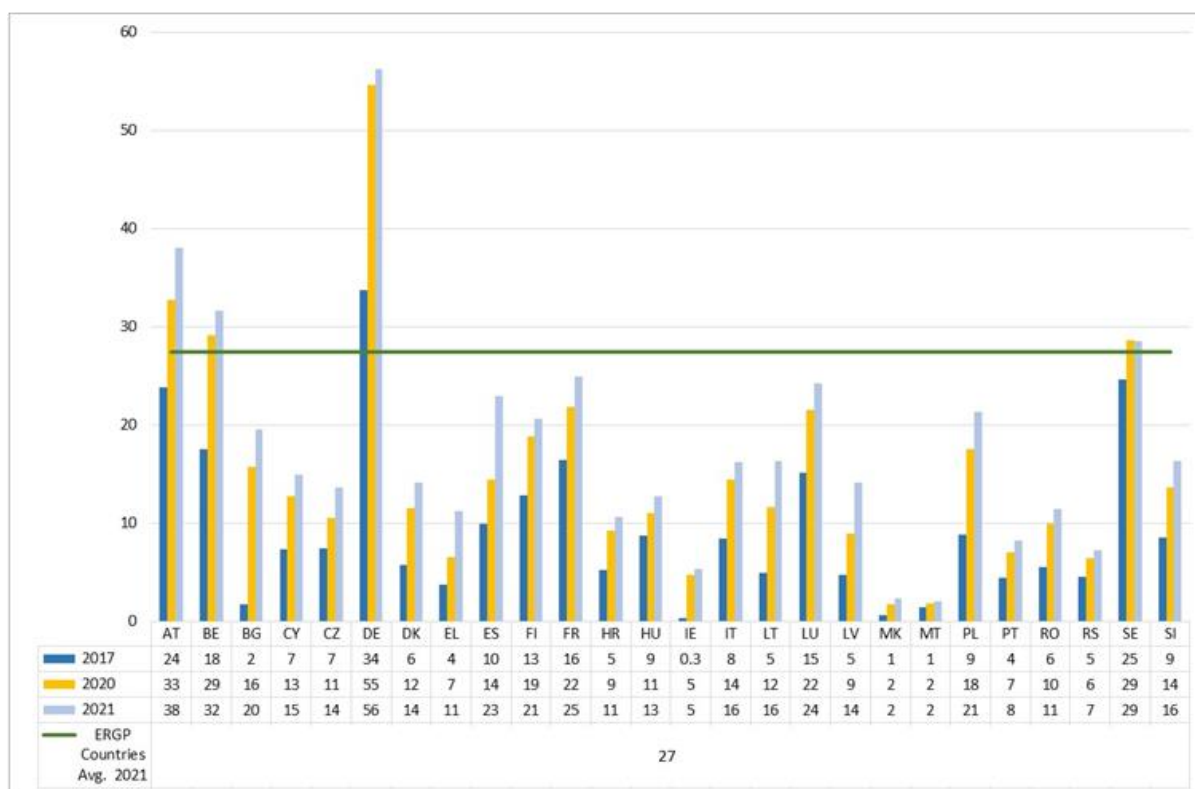


Notes:

1. Please refer to the notes in Figure 30.
2. USO data only: IE, RS.
3. BG: Break in series: As of 2020, express and courier services are included with the parcels.
4. IE: Break in series as of 2020: Packets moved from letters to parcels.
5. EL: Break in series as of 2021: Providers with General License Courier data are all included under parcels.

Parcel volumes per capita continue to grow in all countries compared to 2020. However, although parcel volumes are increasing, the parcel volumes per population rate is still lower than those of letter volumes per population, except for Bulgaria (BG), where the letter per capita is four (4), and the parcel per capita is 20. It can also be argued that this gap is narrowing for some countries. Furthermore, the country with the highest parcel per capita within the ERGP Countries is Germany (DE), with 56 parcels per capita.

Figure 40: Total Parcel Volume per capita



Notes:

1. Please refer to the notes in Figure 30.
2. USO data only: IE.
3. BG: Break in series: As of 2020, express and courier services are included with the parcels.
4. DE: Due to unpredictable subsequent deliveries of the 2020 data on the parcel market in Germany by some PDSPs, the data has been updated.
5. ES: In 2021, Amazon's data has been included for the first time (CNMC resolution: STP/DTSP/006/20 – in Spanish). That explains, in part, the differences between 2020 and 2021 data.
6. IE: Break in series as of 2020: Packets moved from letters to parcels.
7. EL: Break in series as of 2021: Providers with General License Courier data are all included under parcels.

4.4. Revenues

4.4.1. Revenue trends

The revenue situation is more promising than volumes since mail revenues, on average, grew by around 6.7% (approximately €20 billion) compared to 2017. This increase is mainly attributed to the boost in parcel revenue, which increased by an average of 13.0% (approximately €24 billion). Conversely, on average, the letter mail revenue decreased by 3.5% (nearly €4 billion). In 2021, parcels accounted for 70.8% of the total revenues.

Figure 41: Total Postal Revenue and the percentage change between 2017 and 2021

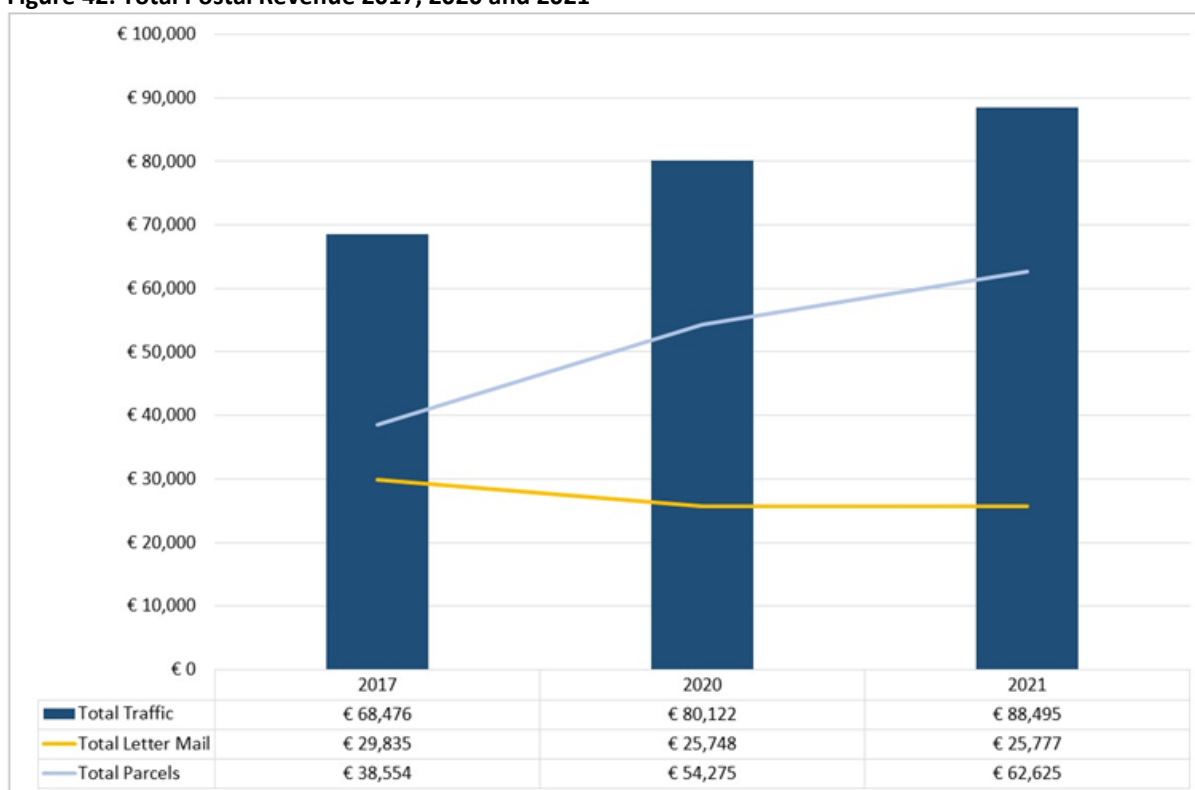
	2017 (in millions)	2020 (in millions)	2021 (in millions)	Percentage change 2020-2021	Average Percentage change 2017 - 2021
Total Revenues	€ 68,476	€ 80,122	€ 88,495	+10.5%	+6.7%
Total Letter Mail	€ 29,835	€ 25,748	€ 25,777	+0.1%	-3.5%
Total Parcels	€ 38,554	€ 54,275	€ 62,625	+15.4%	+13.0%

Notes:

1. *The summation of Total Letter Revenue and Total Parcels Revenue does not tally with Total Traffic. This is due to LT, MK, and PL having the Total Traffic higher than the addition of Letter revenue and Parcel revenue. Feedback from these countries is found below:*
 - a. *LT: Total revenues also include revenues from unaddressed mail and revenues from other activities related to postal service.*
 - b. *PL: Total traffic also includes data on postal money orders and electronic items.*
 - c. *Includes all countries except DK, FI, ME, NO, SE and TR to be able to compare the data for revenues and volumes.*
2. *Letters:*
 - a. *Confidential or not available: DK, EE, FI, MT, NL, NO, TR*
 - b. *USO data only: CY, IE, ME*
 - c. *ERGP Estimates for:*
 - i. *2021: EE, LV, NL;*
 - ii. *2020 & 2019: MK;*
 - iii. *2018 & 2017: MK, RO;*
3. *Parcels:*
 - a. *Confidential or not available: DK, EE, FI, MT, NL, NO, TR*
 - b. *USO data only: IE*
 - c. *ERGP Estimates for:*
 - i. *2021: EE, LV, NL;*
 - ii. *2020 & 2019: MK;*
 - iii. *2018 & 2017: MK, RO;*
4. *Parcel Weight Limit:*
 - a. *No weight limit: LV, MT, ES*
 - b. *AT: The data include parcels up to 31.5 kg, with no differentiation between <20 kg and up to 31.5 kg parcels available.*
 - c. *CZ, IE: 10kg for Universal Service.*
 - d. *BE: Some operators have parcel weight above 31,5kg*
 - e. *HU: Domestic non-US parcel weight limit is 40 kgs.*
 - f. *LT: The weight limit is 50 kg for parcels outside the Universal Service.*
 - g. *RS: There is no limit in kg for parcels non-US.*
 - h. *SK: US domestic and international outbound parcels only up to 10 kg, international inbound up to 20 kg. Parcels outside the US (non-US parcels) up to 50 kg.*
5. *AT: Letters (domestic), newspapers, periodicals, registered mail, insured mail, official documents included in domestic traffic, since no differentiation between domestic/int. is available*
6. *CZ: The definition of postal services (postal items) in the Czech postal legislation is not based on the content of the item but on the weight and the size of the item and the scope of responsibility for loss or damages. Courier services are not included. The courier services are direct delivery without sorting and they are not postal services in the Czech Republic.*
7. *DE: Due to unpredictable subsequent deliveries of the 2020 data on the parcel market in Germany by some PDSPs, the data has*

- been updated.
8. EL: Break in series as of 2021: Providers with General License Courier data are all included under parcels.
 9. ES: In 2021, Amazon’s data has been included for the first time (CNMC resolution: STP/DTSP/006/20 – in Spanish). That explains, in part, the differences between 2020 and 2021 data.
 10. HU: There are no small packets in Hungary, these are handled as letters with the same dimensions.
 11. IE: Change made to figures to reflect definition. Packets moved from letters to parcels
 12. LT: Total revenues also include revenues from unaddressed mail and revenues from other activities related to postal service. Letter-post item includes: 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).
 13. MT: Includes small packets and bulk mail.
 14. PL: Postal orders are included.
 15. SK: The limit for letters is: maximum dimension x+y+z = maximum 90 cm. The biggest size cannot exceed 60 cm. Some small packets are included in letters. and are not distinct from letter post items. The parcel minimum size is 200mm x 150 mm. If an Item fits both descriptions (parcel or letter), it is up to the customer to choose the product.

Figure 42: Total Postal Revenue 2017, 2020 and 2021



Notes:

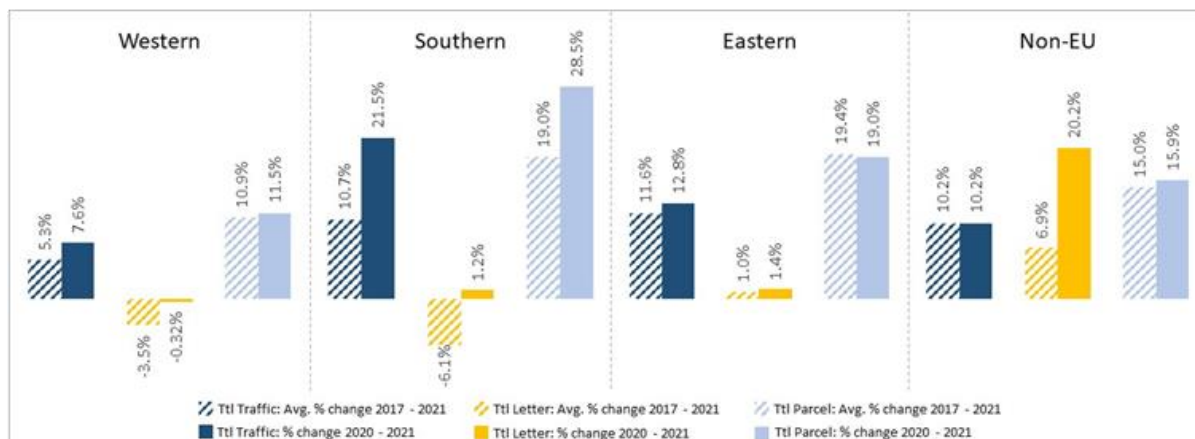
1. Please refer to the notes in Figure 41.
2. BG: Break in series: As of 2020, express and courier services are included with the parcels.
3. DE: Due to unpredictable subsequent deliveries of the 2020 data on the parcel market in Germany by some PDSPs, the data has been updated.
4. EL: Break in series as of 2021: Providers with General License Courier data are all included under parcels.
5. ES: In 2021, Amazon’s data has been included for the first time (CNMC resolution: STP/DTSP/006/20 – in Spanish). That explains, in part, the differences between 2020 and 2021 data.
6. IE: Break in series as of 2020: Packets moved from letters to parcels.

Observing the letter revenue trends across regions and comparing 2021 to 2020, it is noted that all regions registered an increase, except the Western region decreasing by 0.32%. In each respective area, the increase is mainly due to:

- Hungary (HU) and Slovenia (SI) for the Eastern region;
- Serbia (RS) for the Non-EU region, and;
- Italy (IT) and Spain (ES) for the South region.

Likewise, the parcel revenue trend increased in all regions with the contribution of all countries.

Figure 43: Total Revenue – percentage change from 2020 to 2021 and 2017 to 2021



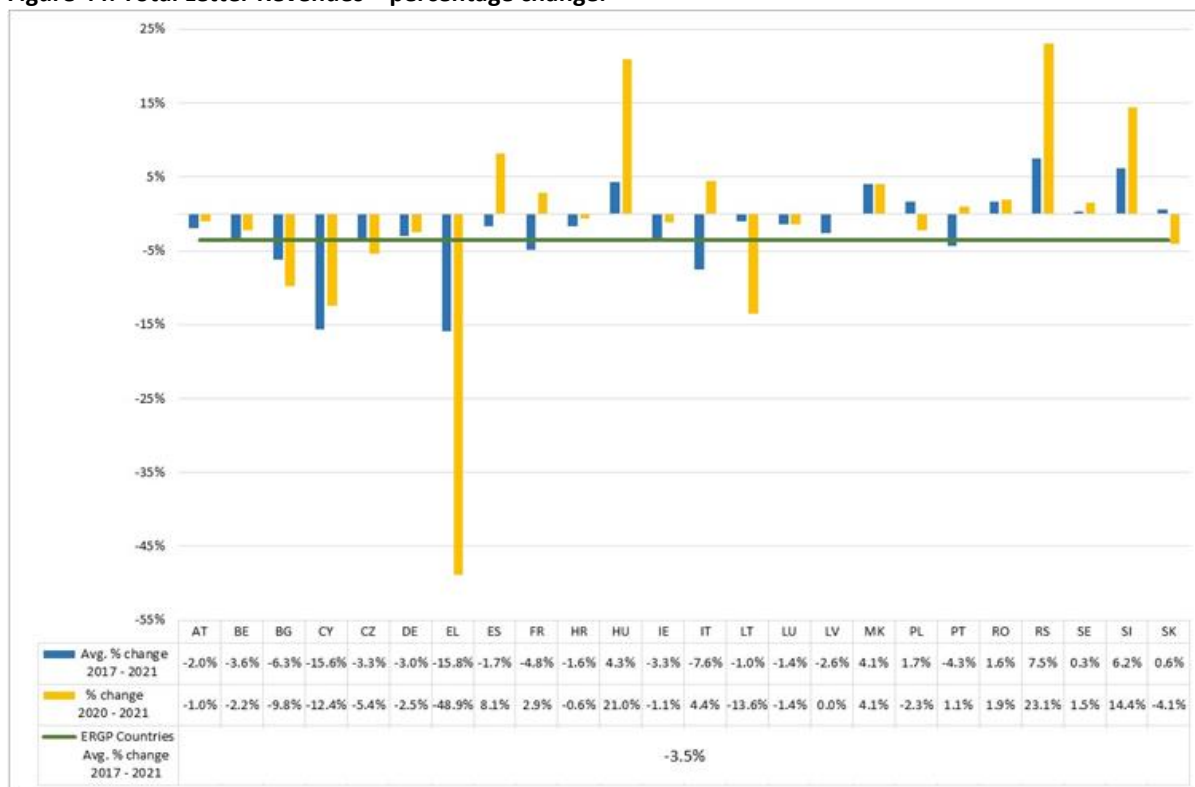
Notes:

1. Please refer to the notes in Figure 41.
2. BG: Break in series: As of 2020, express and courier services are included with the parcels.
3. DE: Due to unpredictable subsequent deliveries of the 2020 data on the parcel market in Germany by some PDSPs, the data has been updated.
4. EL: Break in series as of 2021: Providers with General License Courier data are all included under parcels.
5. ES: In 2021, Amazon’s data has been included for the first time (CNMC resolution: STP/DTSP/006/20 – in Spanish). That explains, in part, the differences between 2020 and 2021 data.
6. IE: Break in series as of 2020: Packets moved from letters to parcels.

In 2021, the letter mail revenues registered a slight increase (0.1%) compared to 2020. This is the first time an increase was noted in the past five (5) years.



Figure 44: Total Letter Revenues – percentage change.

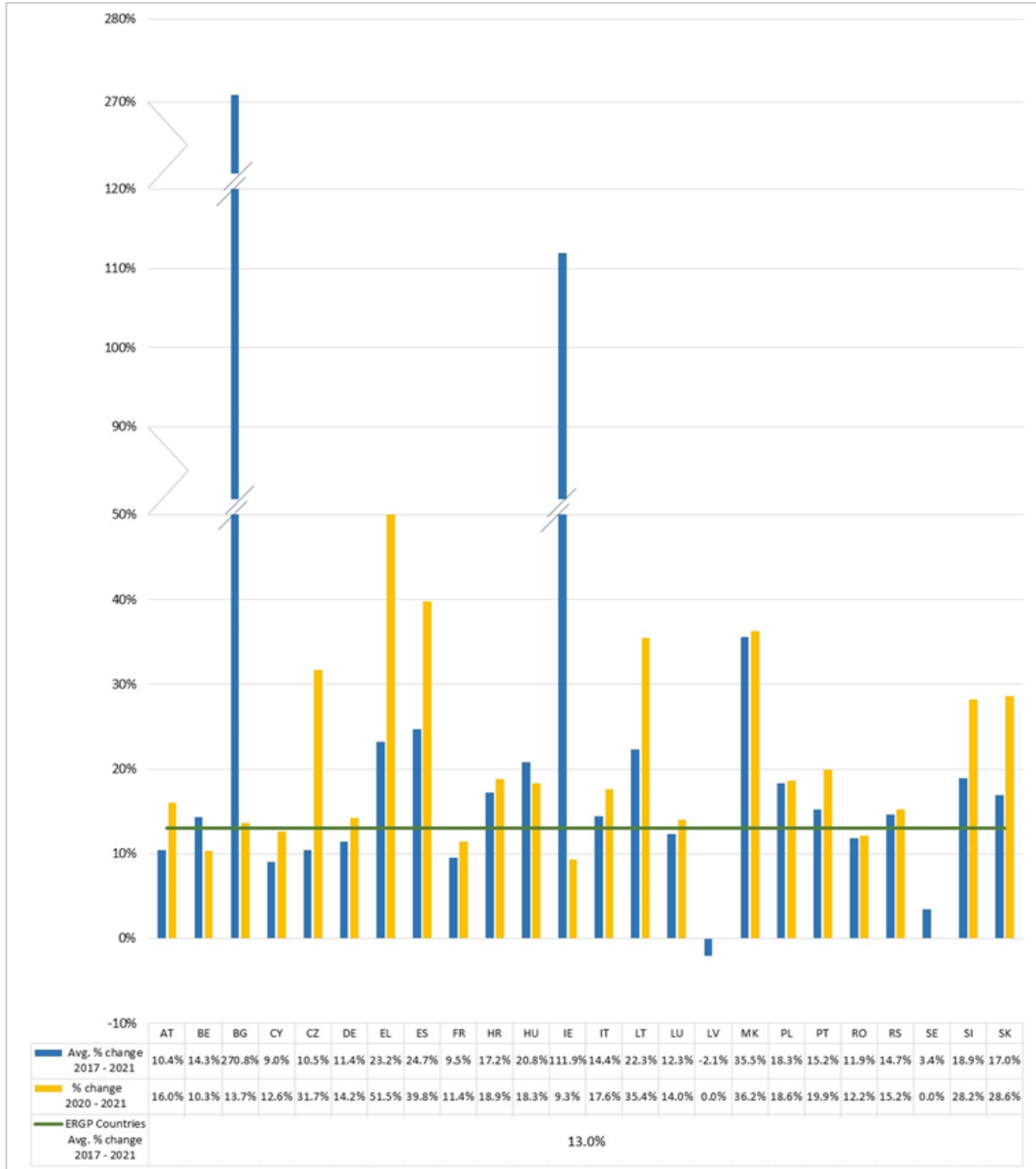


Notes:

1. Please refer to the notes in Figure 41.
2. The average 2017 – 2021 includes all countries except the following:
 - a. DK, FI, ME, NO, and TR, since data is not provided due to either being confidential, not available or being comparable with the volumes.
3. USO data only: CY, IE, RS
4. BG: Break in series: As of 2020, express and courier services are included with the parcels.
5. IE: Break in series as of 2020: Packets moved from letters to parcels.
6. EL: Break in series as of 2021: Providers with General License Courier data are all included under parcels.

On the contrary, parcel revenue grew by 15.4% between 2020 and 2021, greater than the increase registered for parcel volumes (12.1%). Furthermore, it was noticed that this growth (from 2020 to 2021) varied considerably between the countries; in fact, it ranged from 9.3% to 51.5%, with 15 countries having an increase of less than 20%, two (2) countries between 20% and less than 30%, and five (5) countries more than 30%.

Figure 45: Total Parcel Revenue – percentage change.



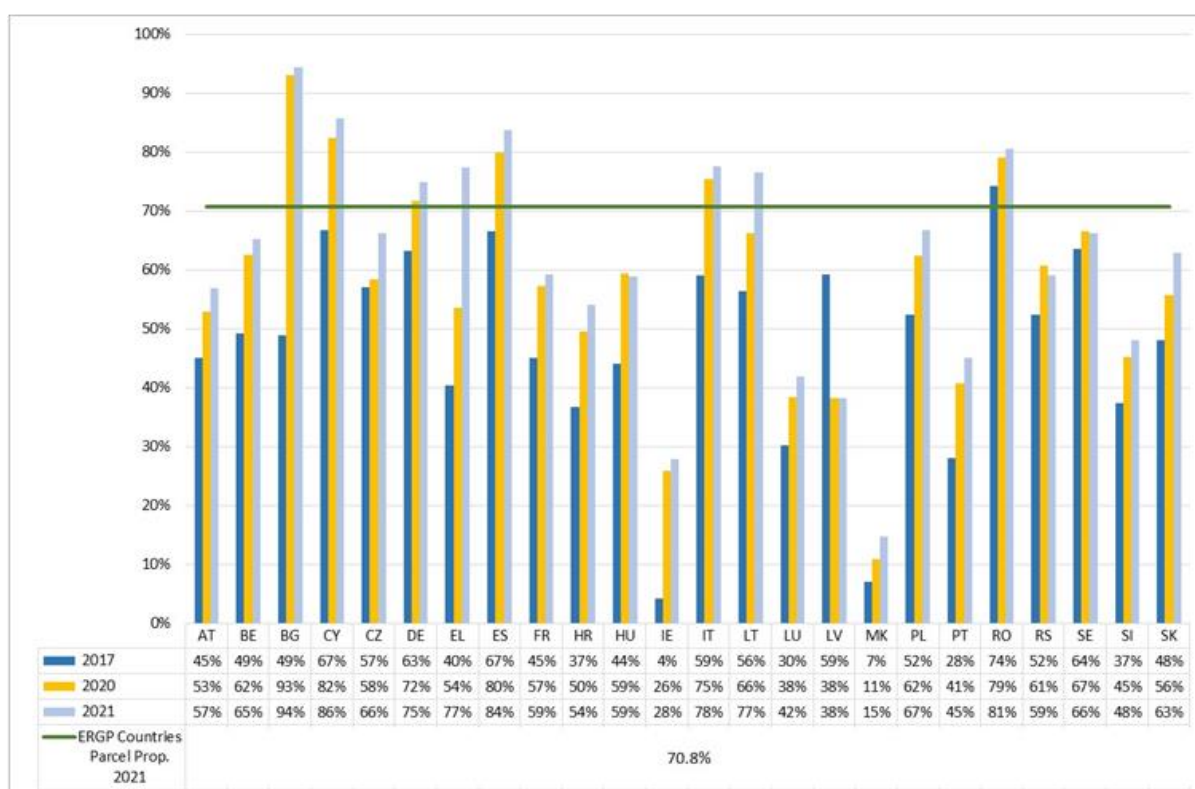
Notes:

1. Please refer to the notes in Figure 41.
2. The average 2017 – 2021 includes all countries except the following:
 - a. DK, FI, ME, NO, and TR, since data is not provided due to either being confidential, not available or to be comparable with the volumes.
3. USO data only: IE, MK.
4. BG: Break in series: As of 2020, express and courier services are included with the parcels.
5. DE: Due to unpredictable subsequent deliveries of the 2020 data on the parcel market in Germany by some PDSPs, the data has been updated.
6. ES: In 2021, Amazon’s data has been included for the first time (CNMC resolution: STP/DTSP/006/20 – in Spanish). That explains, in part, the differences between 2020 and 2021 data.
7. EL: Break in series as of 2021: Providers with General License Courier data are all included under parcels.
8. IE: Break in series as of 2020: Packets moved from letters to parcels.

4.4.2. The proportion of postal revenue

Similar to the parcel volume share, the revenue parcel share is growing from one year to another. The proportion of parcel revenue share increased from 56.3% in 2017 to 70.8 % in 2021. When looking at the ratio of parcel revenue to total revenue in 2021 vis-à-vis 2020, the proportion of parcel revenue varied by 3.0 percentage points, with Bulgaria (BG), Cyprus (CY), Romania (RO) and Spain (ES), having a proportion greater than 80%. The parcel revenue proportion for each country is shown in the figure below.

Figure 46: Proportion of Parcels revenue in Total revenue



Notes:

1. Please refer to the notes in Figure 41.
2. USO data only: IE, MK.
3. BG: Break in series: As of 2020, express and courier services are included with the parcels.
4. DE: Due to unpredictable subsequent deliveries of the 2020 data on the parcel market in Germany by some PDSPs, the data has been updated.
5. EL: Break in series as of 2021: Providers with General License Courier data are all included under parcels.
6. ES: In 2021, Amazon’s data has been included for the first time (CNMC resolution: STP/DTSP/006/20 – in Spanish). That explains, in part, the differences between 2020 and 2021 data.
7. IE: Break in series as of 2020: Packets moved from letters to parcels.

4.4.3. Revenue per capita²⁸

The revenue per capita provides insight into how much each person spends on postal services (letter and parcel mail services). Contrary to the volumes per capita, with an average loss of 3.5%, the average traffic revenue (2017 – 2021) increased by 6.6% (nearly €44.53 per capita). This is due to an increase

²⁸ Population source: Eurostat as at 06/06/2019



in parcel revenue.

Figure 47: Total Annual Postal revenues per capita and the percentage change between 2017 and 2021

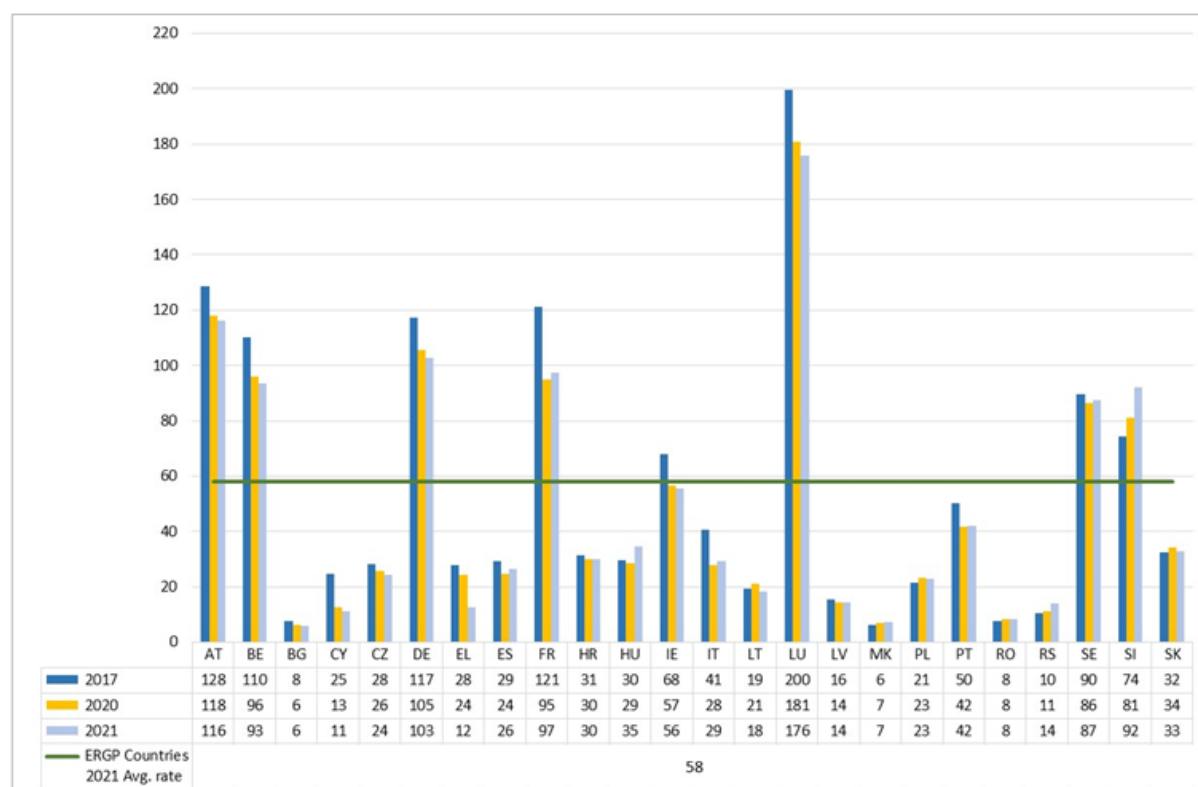
	2017	2020	2021	Percentage change 2020 - 2021	Annual percentage change 2017 - 2021
Total Traffic	€ 154.44	€ 180.06	€ 198.97	+ 10.5%	+ 6.6%
Total Letter Mail	€ 67.29	€ 57.86	€ 57.95	+ 0.2%	-3.6%
Total Parcels	€ 86.95	€ 121.97	€ 140.80	+ 15.4%	+ 12.9%

Note:

1. Please refer to the notes in Figure 41.
2. BG: Break in series: As of 2020, express and courier services are included with the parcels.
3. DE: Due to unpredictable subsequent deliveries of the 2020 data on the parcel market in Germany by some PDSPs, the data has been updated.
4. EL: Break in series as of 2021: Providers with General License Courier data are all included under parcels.
5. IE: Break in series as of 2020: Packets moved from letters to parcels.

In general, letter mail revenues per capita have been decreasing over the years, but 11 countries²⁹ (of those who submitted the data) indicated an increase of up to 24.1% compared to 2020.

Figure 48: Total Letter mail revenues per capita



Notes:

1. Please refer to the notes in Figure 41.
2. USO data only: IE, MK.

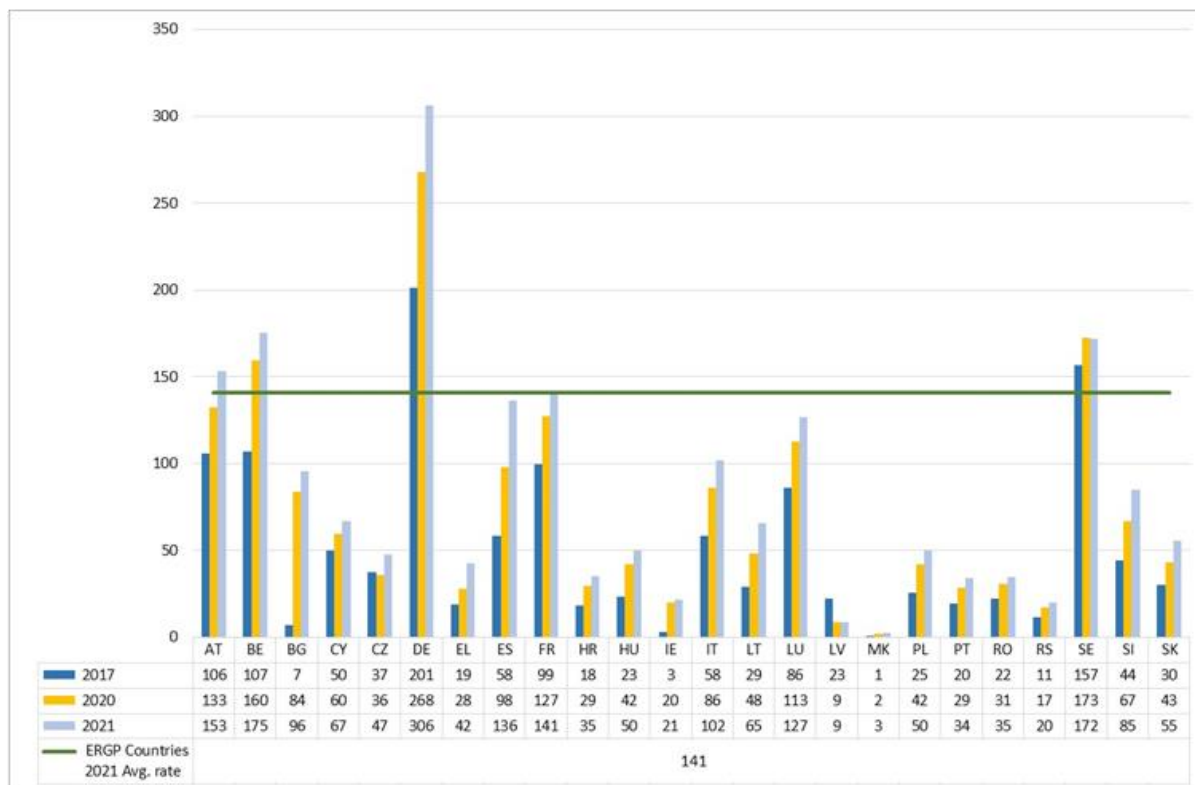
²⁹ Due to rounding issues, the letter mail revenue per capita decrease or increase may not be visible in Figure 48.



3. BG: Break in series: As of 2020, express and courier services are included with the parcels.
4. EL: Break in series as of 2021: Providers with General License Courier data are all included under parcels.
5. IE: Break in series as of 2020: Packets moved from letters to parcels.

In turn, comparing 2021 to 2020, parcel revenue per capita kept growing, with the highest percentage growth registered in Greece (EL), followed by Spain (ES).

Figure 49: Total parcel revenues per capita



Notes:

1. Please refer to the notes in Figures 30 and 41.
2. USO data only: IE, MK.
3. BG: Break in series: As of 2020, express and courier services are included with the parcels.
4. DE: Due to unpredictable subsequent deliveries of the 2020 data on the parcel market in Germany by some PDSPs, the data has been updated.
5. EL: Break in series as of 2021: Providers with General License Courier data are all included under parcels.
6. ES: In 2021, Amazon’s data has been included for the first time (CNMC resolution: STP/DTSP/006/20 – in Spanish). That explains, in part, the differences between 2020 and 2021 data.
7. IE: Break in series as of 2020: Packets moved from letters to parcels.

4.4.4. Average revenues per item

While the average revenue per item is one of the metrics to indicate the relative value of a postal item, it does not represent the retail tariff that an end-user pays for the postal service. In addition, the average revenue per item is subject to various factors, such as whether there is a two-tier service for consumers and the importance of bulk mail, which often has volume-related discounts associated with it, contributing to total mail volumes.

The total revenue per item increased from €1.21 in 2017 to €1.63 in 2021, an average increase of 7.9%,

mainly attributed to the upward revision in letter tariffs and the rising proportion of parcels. Data analysis indicates that the letter mail revenue per item had an average growth of 3.9%, from €0.60 in 2017 to €0.69 in 2021. On the other hand, parcels dropped from €5.67 in 2017 to €5.14 in 2021, a reduction of 2.4% on average.

Figure 50: Average revenue per item and the percentage change between 2017 and 2021

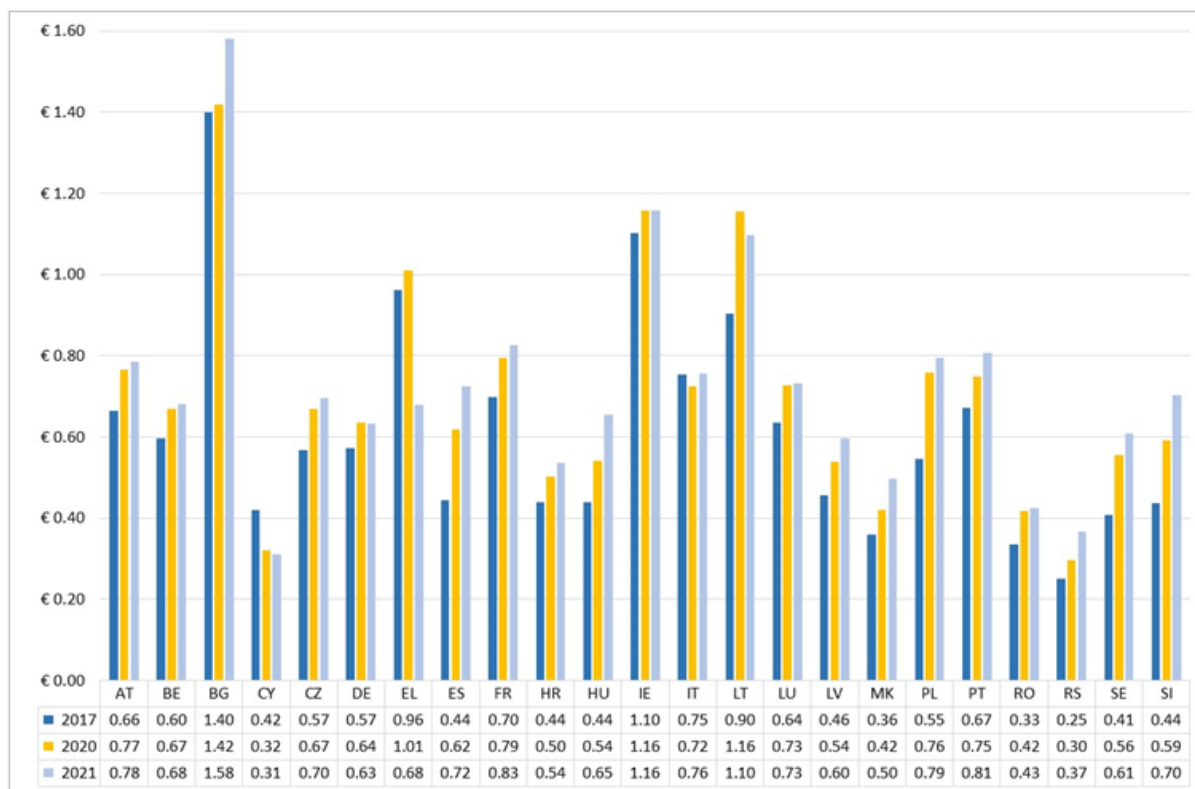
	2017	2020	2021	Percentage change 2020 - 2021	Average percentage change 2017 - 2021
Total Traffic	€1.21	€1.64	€1.63	-0.6%	+7.9%
Total Letter Mail	€0.60	€0.68	€0.69	+3.3%	+3.9%
Total Parcels	€5.67	€4.99	€5.14	+3.0%	-2.4%

Notes:

1. Please refer to the notes in Figures 30 and 41.
2. BG: Break in series: As of 2020, express and courier services are included with the parcels.
3. DE: Due to unpredictable subsequent deliveries of the 2020 data on the parcel market in Germany by some PDSPs, the data has been updated.
4. EL: Break in series as of 2021: Providers with General License Courier data are all included under parcels.
5. ES: In 2021, Amazon's data has been included for the first time (CNMC resolution: STP/DTSP/006/20 – in Spanish). That explains, in part, the differences between 2020 and 2021 data.
6. IE: Break in series as of 2020: Packets moved from letters to parcels.

Revenue per letter item increased across the ERGP countries between 2020 and 2021, with a growth of up to 23.1%. On the other hand, Cyprus (CY), Germany (DE), Greece (EL) and Lithuania's (LT) average revenue per letter item drop varies between 0.5% and 32.8%.

Figure 51: Average revenue per letter item

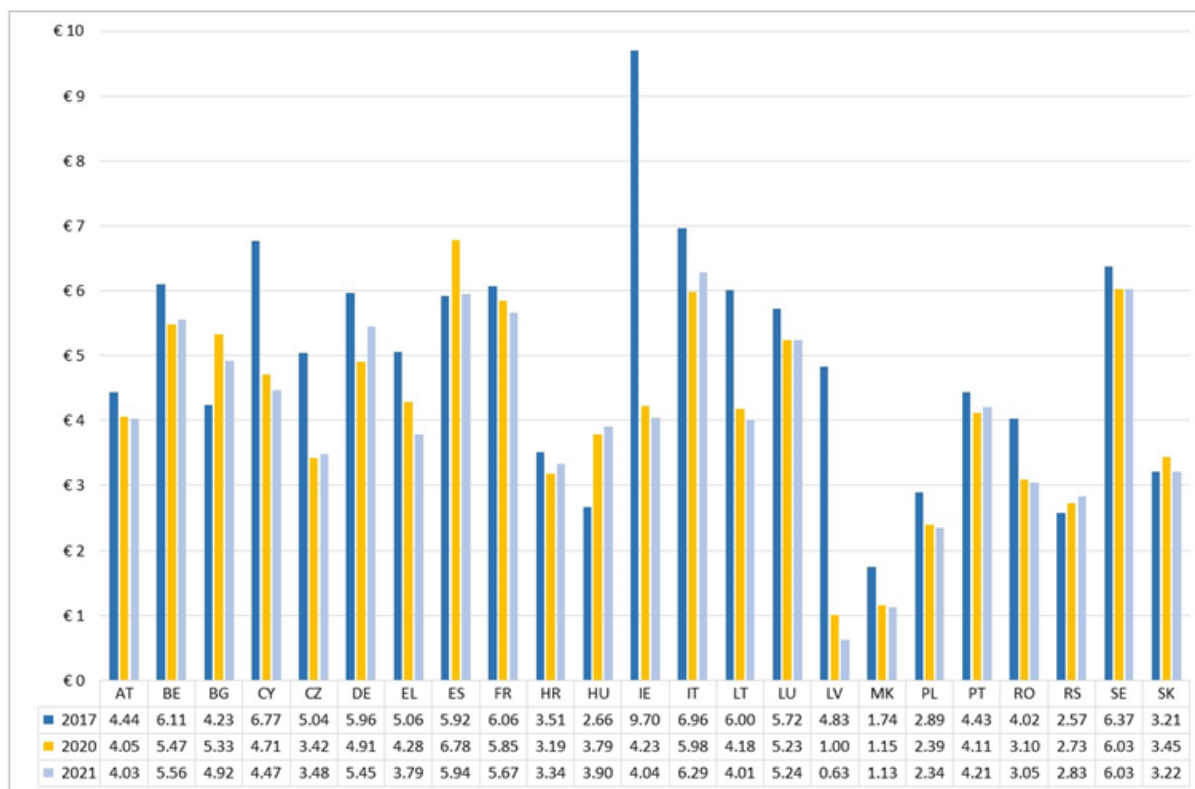


Notes:

1. Please refer to the notes in Figures 30 and 41.
2. USO data only: IE, MK, RS.
3. BG: Break in series: As of 2020, express and courier services are included with the parcels.
4. EL: Break in series as of 2021: Providers with General License Courier data are all included under parcels.
5. IE: Break in series as of 2020: Packets moved from letters to parcels.

The average revenue per parcel item is significantly higher than letters. But compared to 2020, the following countries registered a decrease in their average revenue per parcel, which varies from 0.4% to 36.5%: Austria (AT), Bulgaria (BG), Cyprus (CY), France (FR), Greece (EL), Ireland (IE), Latvia (LV), Lithuania (LT), North Macedonia (MK), Poland (PL), Romania (RO) and Spain (ES).

Figure 52: Average revenue per parcel item



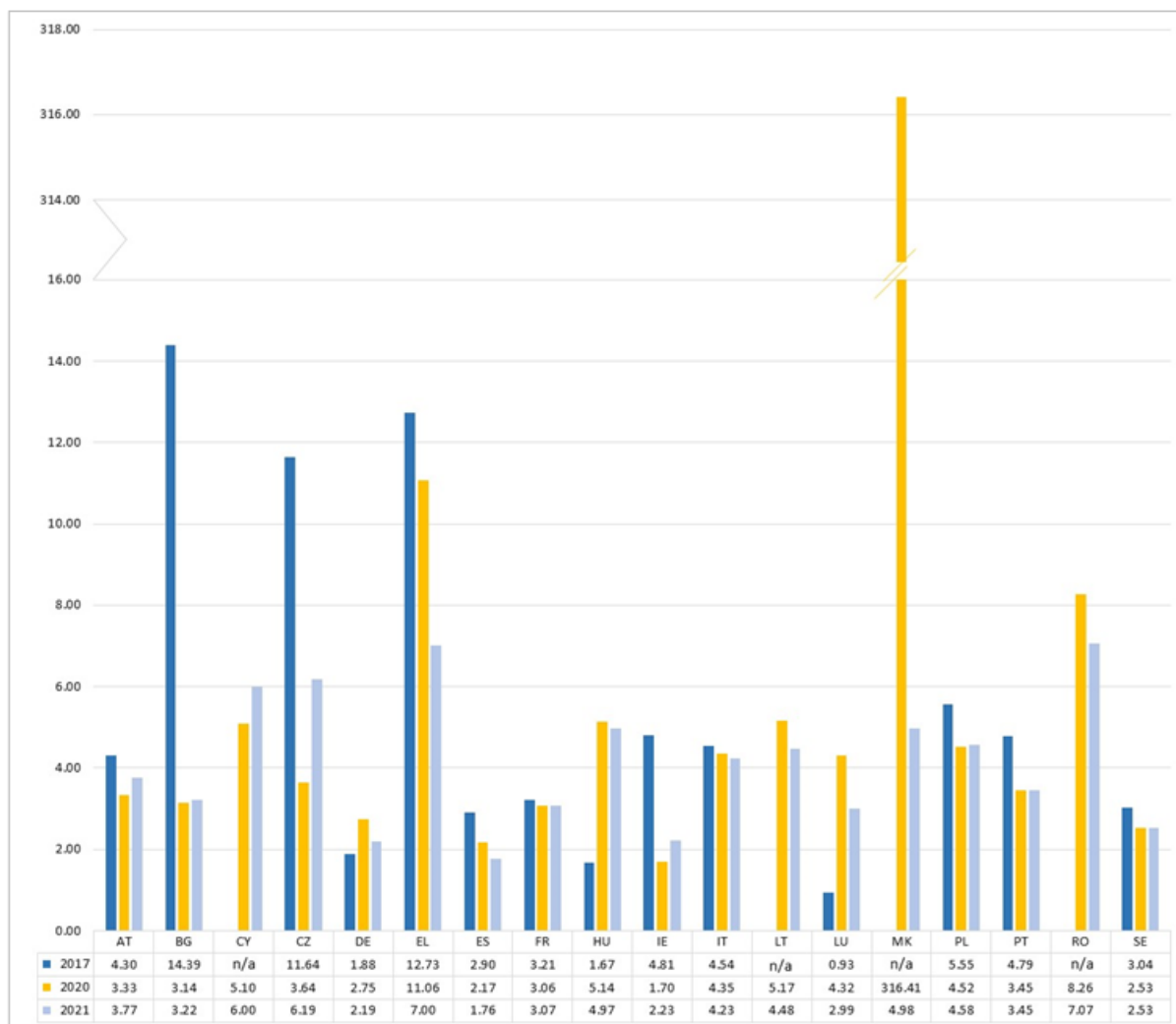
Notes:

1. Please refer to the notes in Figures 30 and 41.
2. USO data only: IE, MK.
3. BG: Break in series: As of 2020, express and courier services are included with the parcels.
4. DE: Due to unpredictable subsequent deliveries of the 2020 data on the parcel market in Germany by some PDSPs, the data has been updated.
5. EL: Break in series as of 2021: Providers with General License Courier data are all included under parcels.
6. ES: In 2021, Amazon's data has been included for the first time (CNMC resolution: STP/DTSP/006/20 – in Spanish). That explains, in part, the differences between 2020 and 2021 data.
7. IE: Break in series as of 2020: Packets moved from letters to parcels.

An interesting aspect of the parcel is understanding the combination of the above rate, split by the various compositions, especially the domestic and outbound. The chart below shows how much the average outbound revenue per parcel is higher than the average domestic revenue per parcel. During 2021, for seven (7) countries, the difference between these two averages increased varying between 0.2% to 70.0%, whereas nine (9) countries showed a decrease in this difference, varying between - 2.9% to -98.4%.

For example, in 2021, Romania (RO) had the highest average revenue per parcel difference, with the average outbound revenue per parcel being 7.07 times higher than the domestic (Domestic average revenue per parcel = € 2.60, Outbound average revenue per parcel = €18.40). Contrarily, for Spain (ES), the average revenue per outbound parcel is 1.76 times greater than the average revenue per domestic parcel (Domestic average revenue per parcel = €5.47, Outbound average revenue per parcel = €9.61).

Figure 53: Ratio between Domestic and Outbound average parcel rate per item



Notes:

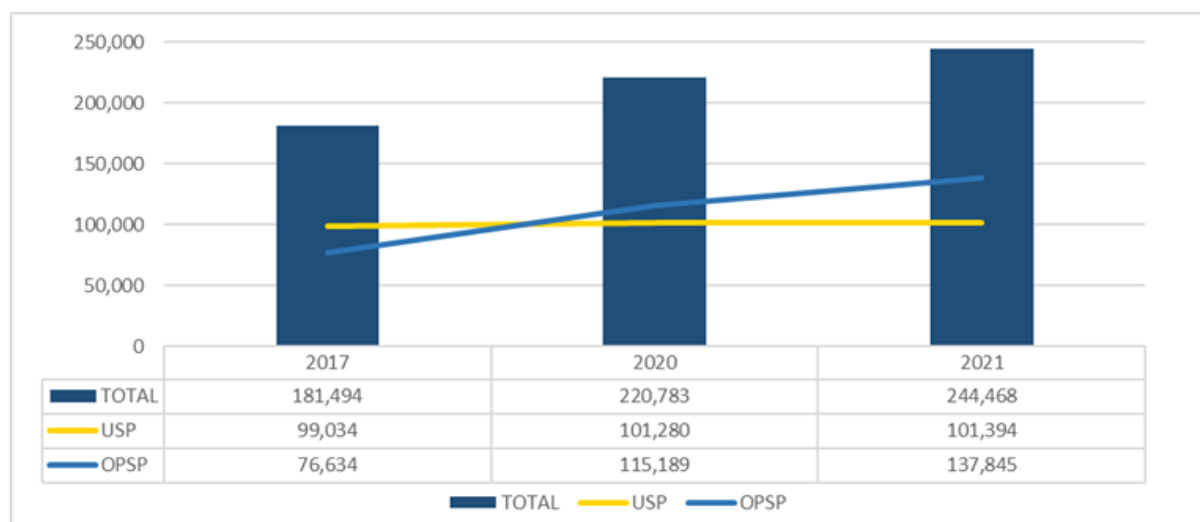
1. *USO data only: IE, MK.*
2. *BG: Break in series: As of 2020, express and courier services are included with the parcels.*
3. *DE: Due to unpredictable subsequent deliveries of the 2020 data on the parcel market in Germany by some PDSPs, the data has been updated.*
4. *EL: Break in series as of 2021: Providers with General License Courier data are all included under parcels.*
5. *ES: In 2021, Amazon's data has been included for the first time (CNMC resolution: STP/DTSP/006/20 – in Spanish). That explains, in part, the differences between 2020 and 2021 data.*
6. *IE: Break in series as of 2020: Packets moved from letters to parcels.*

4.5. Postal establishments

The data provided indicates that from 2017 to 2021, the total number of postal establishments increased by 34.7%, amounting to 244,468. The number of USP postal establishments rose slightly (2.4%), although there was a jump in the number of postal establishments of OPSP (79.9%).

USP postal establishments have not changed significantly in the last year. However, the OPSP continued increasing, and in 2021, there was significant growth compared to the previous year (19.7%). It is worth mentioning that in 2021, Spain (ES) (CNMC resolution: STP/DTSP/006/20 – in Spanish) included Amazon’s data for the first time. That explains, in part, the differences between 2020 and 2021 for Spain’s (ES) data.

Figure 54 – Total number of postal establishments by USP and OPSP: 2017-2021



NOTES:

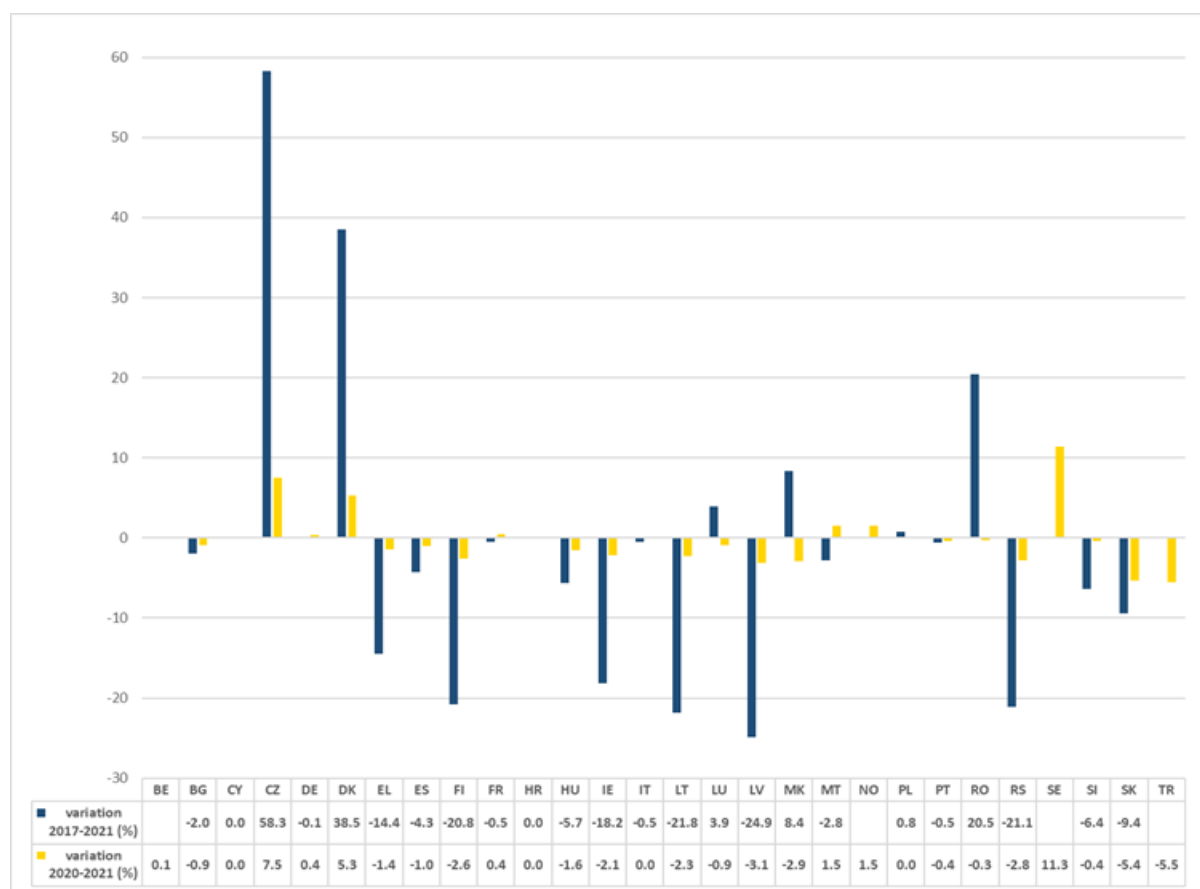
1. Data referring only to countries where data is available regarding postal establishments of both the USP and the OPSP. Contains some estimates according to section on methodology.
2. Where no data is available for 2017, it is used data for the first year for which there is data.
3. Where no data is available for 2021, it is used data for the last year for which there is data.
4. 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.
5. Total is not the sum of USP and OPSP because AT does not separate USP and OPSP, they provide only total.
6. BE: Some locations are shared by operators => double counting of locations.
 BG: OPSP: 3894 of them are Mobile post offices (e.g. van) managed by the Other postal service providers.
 ES: USP: Mobile post offices and Mail man are the same.
 ES: OPSP: Service points.
 ES: Total: Include service points.
 HU: OPSP: customer offices.
 IE: Postal establishments managed by the USP: Company post offices + Contract post offices.
 RO: OPSP: provisional.
 SE: OPSP: These are not unique service points as many establishments are shared by several PSPs

The total number of postal establishments varies significantly from country to country. As shown in the figures below, in most ERGP countries, USP postal establishments have shrunk since 2017. The most significant drops have been in Latvia (LV) (-24.9%), Lithuania (LT) (-21.8%) and Serbia (RS) (-21.1%). The decrease in Lithuania (LT) is due to the USP reduction in the number of stationary postal

establishments and increases in the number of mobile ones. Only six countries show a growth trend, but not more than 10%, except for the Czech Republic (CZ), where growth was 58.3%, Denmark (DK), with a 38.5% increase, and Romania (RO), with a 20.5% increase. In Cyprus (CY) and Croatia (HR), the number of USP postal establishments remained the same in these five years.

When comparing 2020 and 2021, only eight countries registered a rise, as in the case of Sweden (SE) (11.3%), the Czech Republic (CZ) (7.5%), Denmark (DK) (5.3%), Norway (NO) and Malta (MT) (1.5% both), France (FR) and Germany (DE) (0.4% both) and Belgium (0.1%). In other countries, there were reductions, but not greater than 6%.

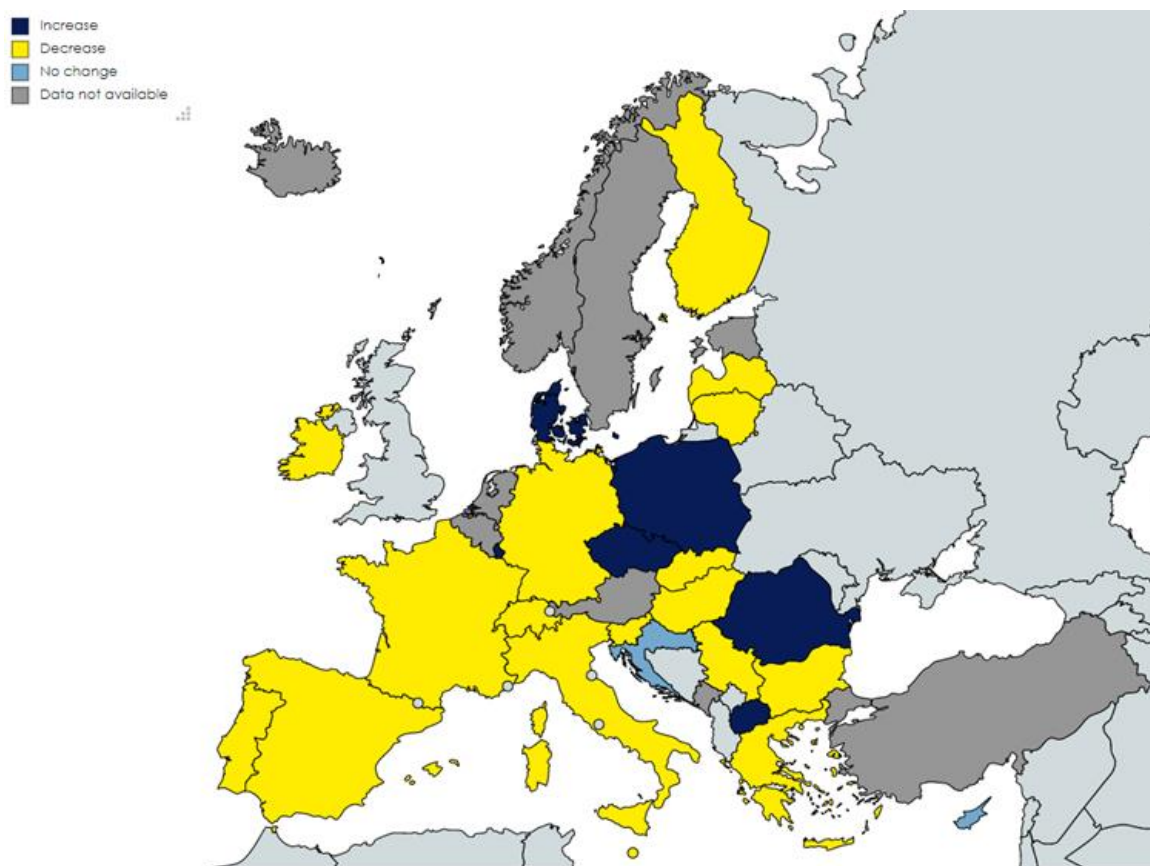
Figure 55 – Percentage change of the USP postal establishments 2017-2021 and 2020-2021



NOTES:

1. Data referring only to countries where data is available and is not confidential regarding postal establishments of the USP. Contains some estimates according to section on methodology.
2. 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 kinds of postal establishments were excluded.

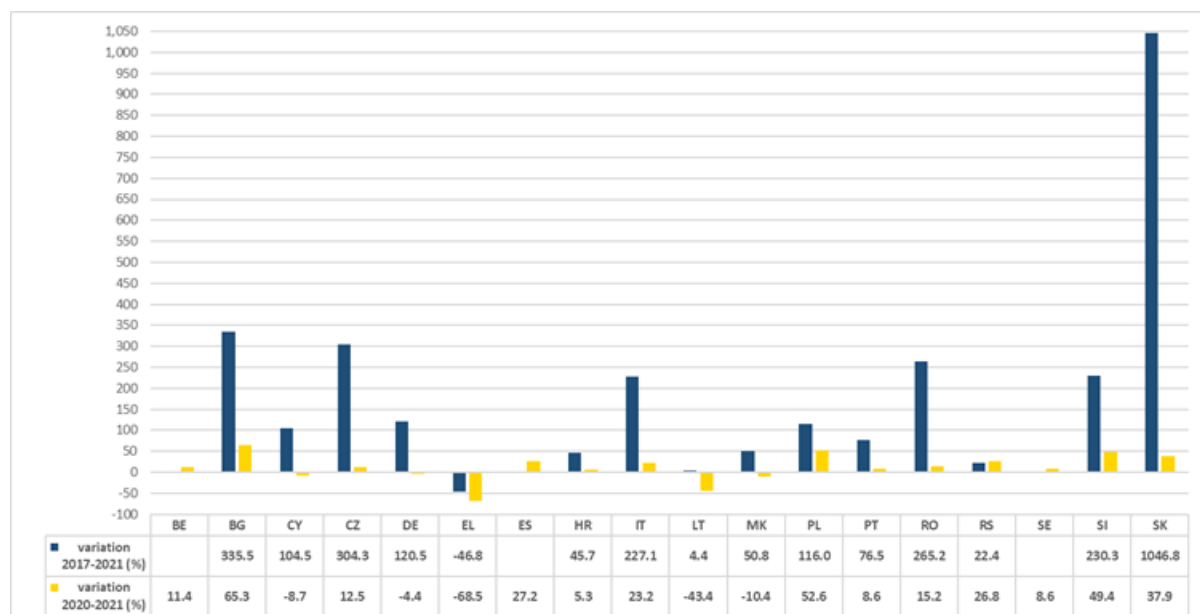
Figure 56 – Percentage change of the USP postal establishments 2017-2021



As for the number of OPSP postal establishments, there has been an increase in 2021, compared to 2017, for most countries that provided data. The following figure shows that this increase was particularly relevant in Slovakia (SK) (+1,476 postal establishments), increasing by 1,046.8%.

After a deeper analysis of the developments during 2021, it is observable that the changes in the number of OPSP postal establishments since 2020 were less significant. However, in almost all the ERGP countries, this number has grown steadily, especially with substantial increases in Bulgaria (BG) (65.3%) and Poland (PL) (52.6%).

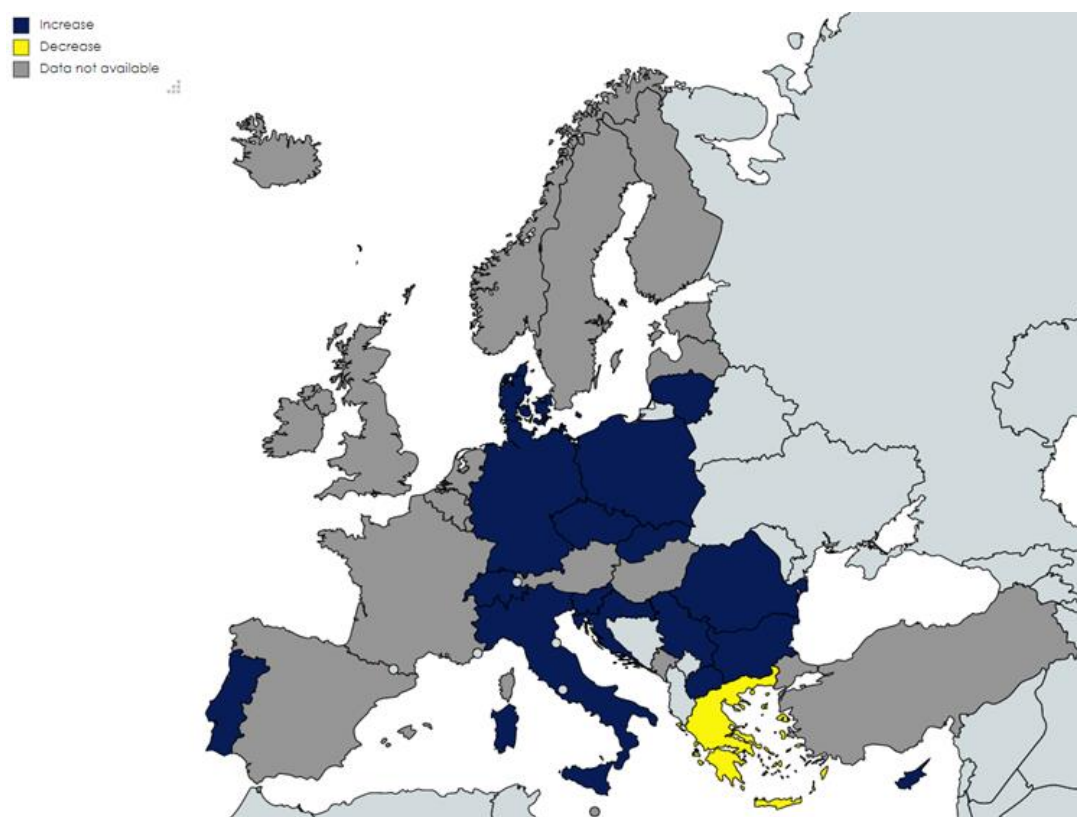
Figure 57 – Percentage change of the OPSP postal establishments 2017-2021 and 2020-2021



NOTES:

1. Data referring only to countries where data is available and is not confidential for postal establishments of OPSP. Contains some estimates according to section on methodology.

Figure 58 – Percentage change of the OPSP postal establishments 2017-2021

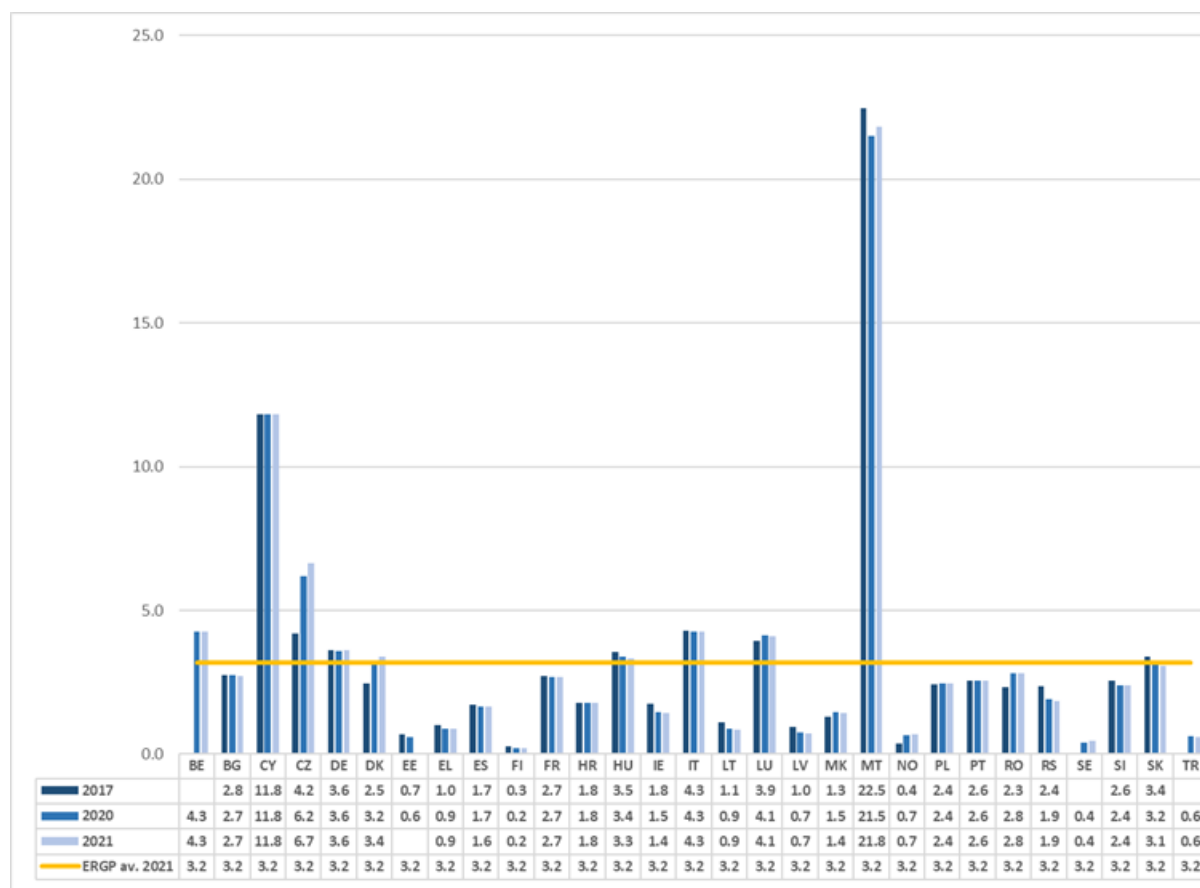


4.5.1. Postal establishments per area

Considering the distribution of postal establishments in the country, the number of USP postal establishments per 100km² is very heterogeneous amongst ERGP countries, varying, in 2021, from 0.2 in Finland to 21.8 in Malta (MT), as illustrated in the following figure.

It is worth noting that most countries have not seen a remarkable change in the number of USP postal establishments per 100km² since 2017. In addition, it is worth paying attention to the fact that for the countries that provided the data in 2021, only three of them the number of USP postal establishments per 100km² is higher than 5 (Malta (MT), Cyprus (CY) and Czech Republic (CZ)). The average of all ERGP countries reached 3.2 in 2021.

Figure 59 – Postal establishments per 100km²: USP only



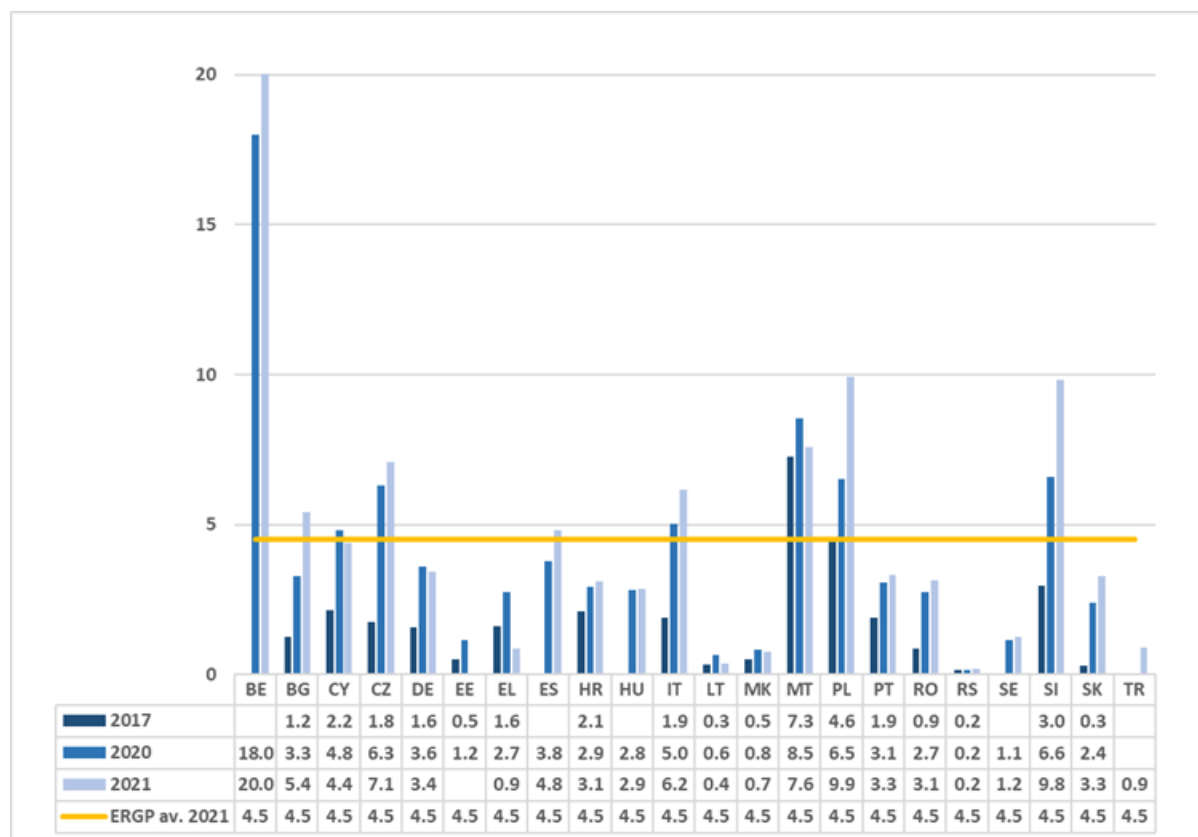
NOTES:

1. Country area data from Eurostat. Extracted on 2022-10-01 from: https://ec.europa.eu/eurostat/databrowser/view/REG_AREA3/default/table?lang=en&category=reg
2. Data referring only to countries where data is available regarding postal establishments of the USP.
3. Contains some estimates according to section on methodology.
4. 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.

A similar situation occurs regarding the number of OPSP postal establishments per 100km², with no significant change in 2021 compared to 2017 in absolute numbers. Belgium (BE) is an exception as the

data may be influenced by the fact that operators share some locations; therefore, double counting of locations can cause an artificial increase of the actual number, which is why the data should be considered indicative only. In 2021 only in seven of the countries that were able to provide data, the number of OPSP postal establishments per 100km² higher than 5: (Belgium (BE), Bulgaria (BG), Czech Republic (CZ), Italy (IT), Malta (MT), Poland (PL) and Slovenia (SI)). The average of the ERGP countries was 4.5 postal establishments per 100km².

Figure 60 – Postal establishments per 100km²: OPSP



NOTES:

1. Country area data from Eurostat. Extracted on 2022-10-01 from: https://ec.europa.eu/eurostat/databrowser/view/REG_AREA3/default/table?lang=en&category=reg
2. Data referring only to countries where data is available regarding postal establishments of OPSP.
3. Blank cells represent data not available. Contains some estimates according to section on methodology.

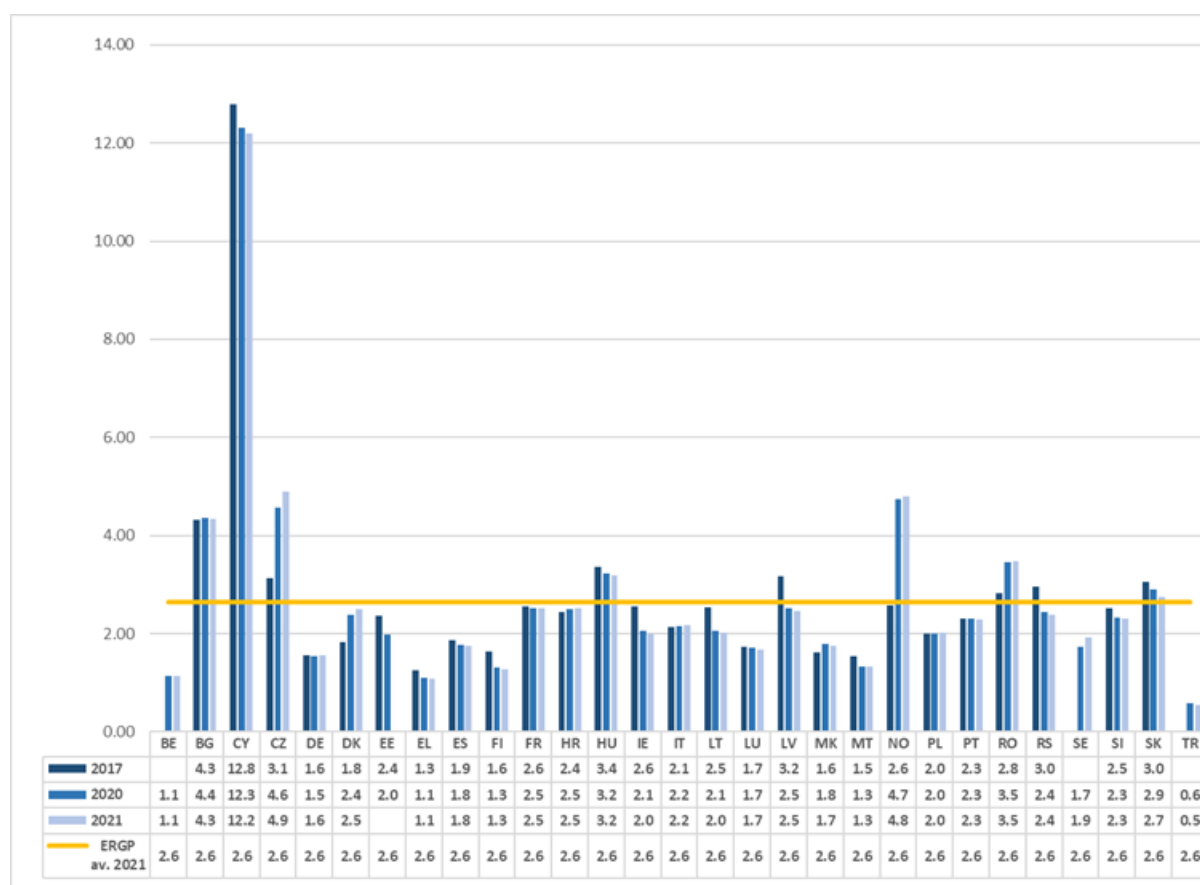
4.5.2. Postal establishments per population

Considering 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, similar to what is observed regarding the distribution according to a country area. As the subsequent two figures describe, in 2021, this ratio ranges from 0.5 postal establishments per 10,000 people in Turkey (TR) to 12.2 in Cyprus (CY) for the USP and from 0.3 postal establishments per 10,000 people in Serbia (RS) to 9.5 in Slovenia (SI) for the OPSP. For most countries, the ratios observed in 2021 do not change



significantly from the ones in 2017. The most significant variation in the USP postal establishments was in Norway (NO) – from 2.6 in 2017 to 4.8 in 2021. The average of the ERGP countries was 2.6 in 2021. When analysing the ratio of OPSP postal establishments per 10,000 people, the variations between 2017 and 2021 appear to be more significant. The most noticeable variations were Bulgaria (BG) – from 1.9 in 2017 to 8.7 in 2021 and Slovenia (SI) – from 2.9 in 2017 to 9.5 in 2021. For Slovenia (SI), the reason may be a signed contract with the USP by one of the OPSPs, resulting in some shared locations by operators. As explained above, double counting of locations can cause an artificial increase in the actual number, so data should be considered indicative only. Also, it is worth mentioning that for the OPSP, the average of the ERGP countries was 3.6 in 2021. Nevertheless, although the percentage fluctuations may appear significant in both cases, the actual number does not appear to have significant relevance.

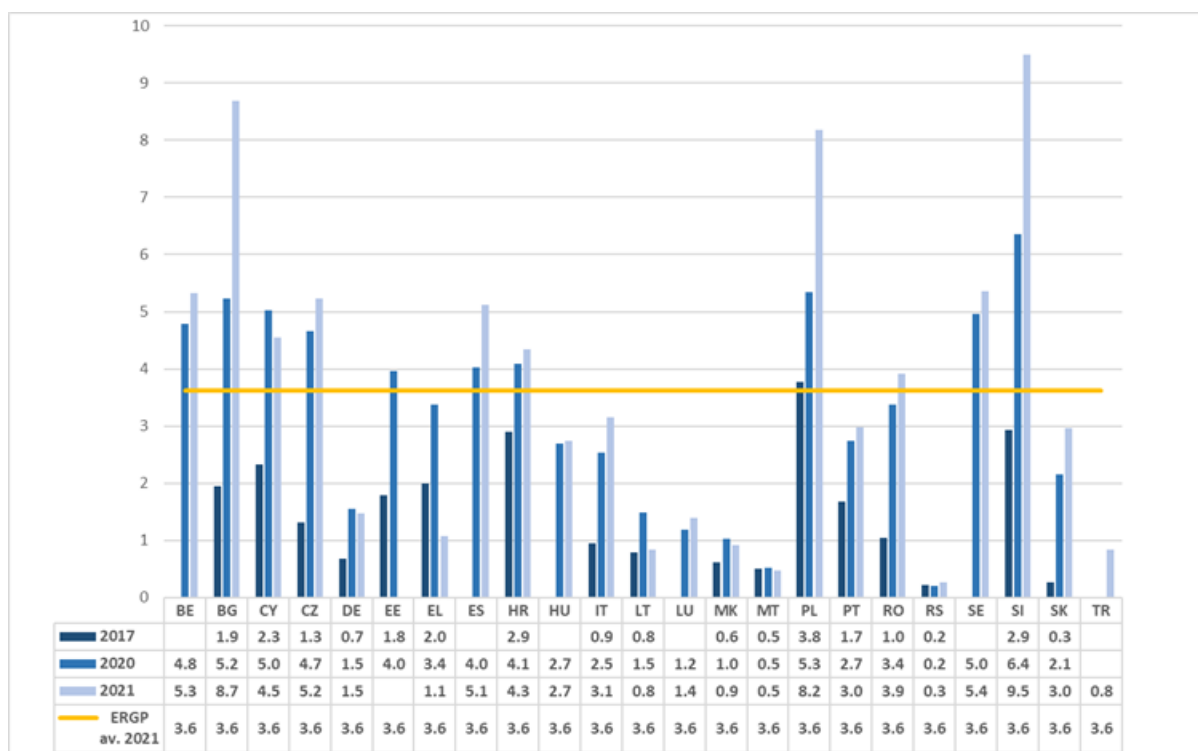
Figure 61 – Postal establishments per 10,000 people: USP



NOTES:

1. Country population data from Eurostat. Extracted on 2022-08-03 from: <https://appsso.eurostat.ec.europa.eu/nui/submitViewTableAction.do>
2. Data referring only to countries where data is available regarding postal establishments of the USP.
3. Blank cells represent data not available.
4. 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 62 – Postal establishments per 10,000 people: OPSP



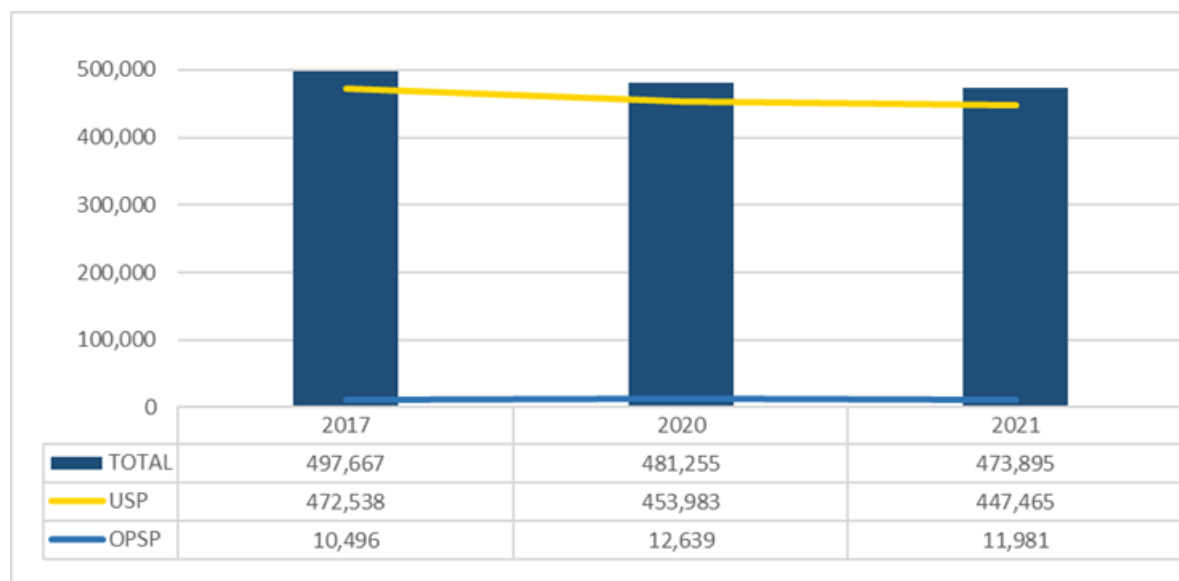
NOTES:

1. Country population data from Eurostat. Extracted on 2022-08-03 from: <https://appsso.eurostat.ec.europa.eu/nui/submitViewTableAction.do>
2. Data referring only to countries where data is available regarding postal establishments of OPSP.
3. Blank cells represent data not available.

4.5.3. Letterboxes³⁰

As illustrated in the accompanying figure and considering the total data for the countries that provided information, between 2017 and 2021, the number of USP letterboxes declined by 4.8%. Between 2020 and 2021, it decreased slightly by 1.5% and reduced to 473,895 letterboxes. In 2021, the share of the USP was 94.4%; as for the OPSP, there is only data available for Bulgaria (BG), Germany (DE), Romania (RO), Spain (ES) and Sweden (SE).

Figure 63 – Total number of letterboxes by USP and OPSP: 2017-2021



NOTES:

1. Where no data is available for 2017, in the total it is used data for the first year for which there is data.
2. Where no data is available for 2021, in the total it is used data for the last year for which there is data.
3. Total is not the sum of USP and OPSP because AT does not separate USP and OPSP, they provide only total.
4. CZ: OPSP: In the past one of the providers submitted wrong data about letterboxes.
IE: OPSP: This figure is not reported by PSPs.
RO: OPSP: provisional.

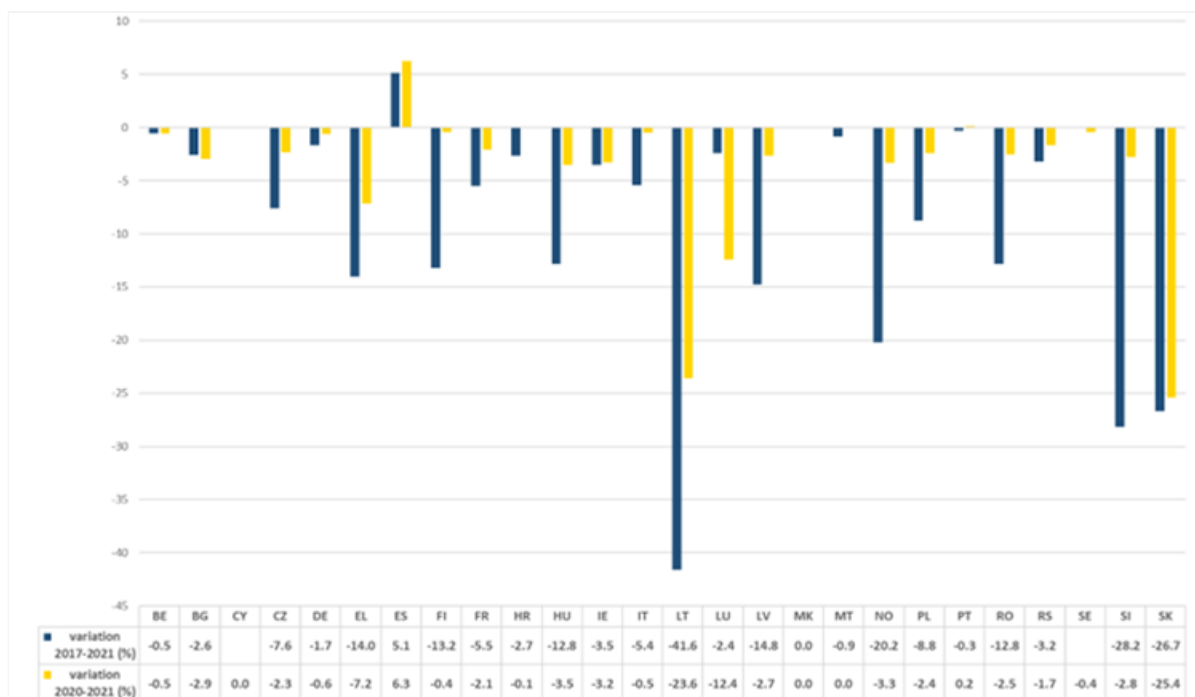
The total number of letterboxes varies significantly from country to country. Therefore, the data presented above is influenced considerably by France (FR) and Germany (DE) figures, accounting for 51.6% of the total number of letterboxes.

As shown in the figure below, in most ERGP countries, USP letterboxes have decreased since 2017. The exception is the rise in Spain (ES) (5.1%). On the other hand, the most significant decreases have been in Lithuania (LT) (-41.6%), Slovenia (SI) (-28.2%), Slovakia (SK) (-26.7%) and Norway (NO) (-20.2%). Looking at the period 2020 and 2021, only five countries registered absolute variations greater than 5%: Slovakia (SK) (-25.4%), Lithuania (LT) (-23.6%), Luxembourg (LU) (-12.4%), Greece (EL) (-7.2%) and Spain (ES) (6.3%). There were only two countries where the number of letterboxes increased in 2021

³⁰ Letterboxes are those where postal items may be deposited by the customers, either at public locations or at the premises of the providers.

– Spain (ES) (6.3%) and Portugal (PT) (0.2%). In North Macedonia (MK), USP letterboxes have remained the same since 2017.

Figure 64 – Percentage change of the USP letterboxes 2017-2021 and 2020-2021



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.

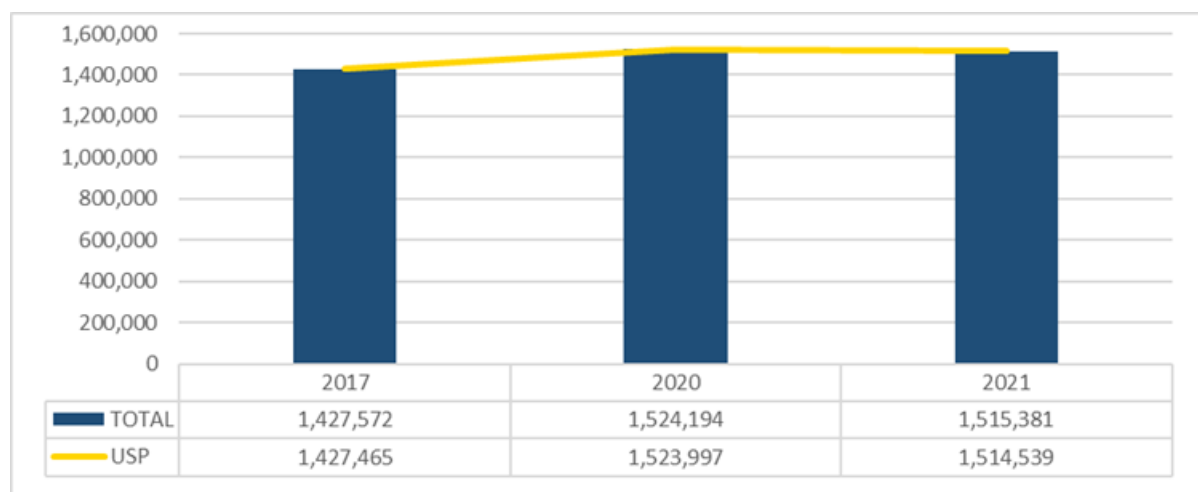
4.5.4. Post office boxes³¹

The total number of post office boxes varies from country to country. In this respect, note that the data presented below is significantly influenced by data from Italy (IT), Poland (PL), Portugal (PT) and Spain (ES). These four countries account for 75.9% of the total post office boxes presented in the figure below.

As shown in the following figure, between 2017 and 2021, the number of post office boxes increased by 6.2%, which amounted to 1,515,381. In 2021, the share of the USP was 99.94%. For the OPSP, there is only data available for Cyprus (CY), Spain (ES) and Romania (RO).

³¹ Post office box is a facility available to users at their request where the mail is delivered to instead of their actual postal address.

Figure 65 – Total number of post office boxes by USP: 2017-2021

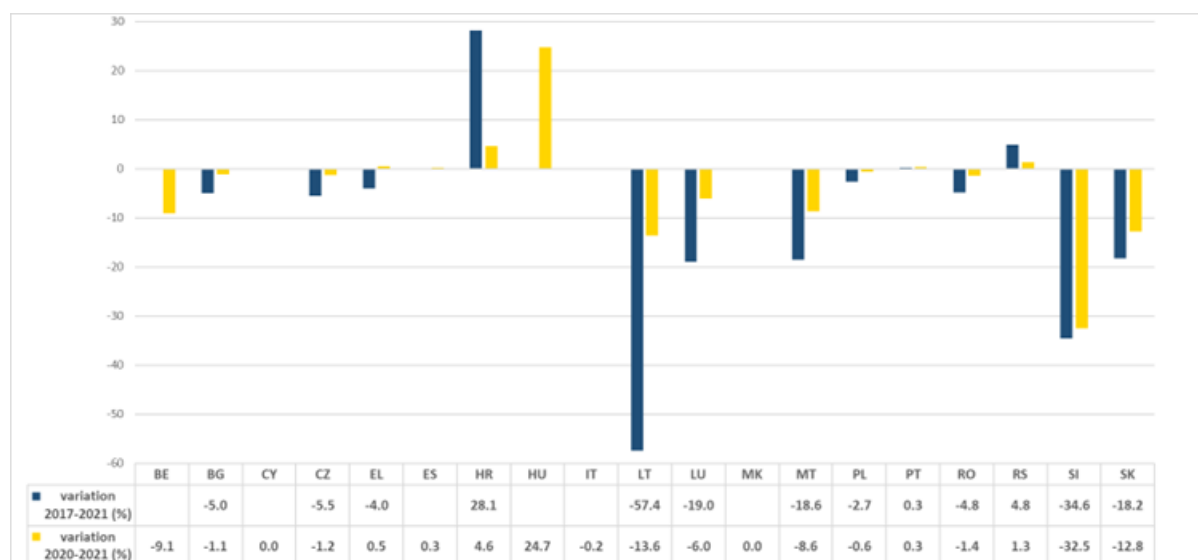


NOTES:

1. Data referring only to countries where data is available.
2. Where no data is available for 2017, it is used data for the first year for which there is data.
3. Where no data is available for 2021, it is used data for the last year for which there is data.

As the figure below shows, in the majority of the ERGP countries, the number of USP post office boxes has declined since 2017. Still, the number of post office boxes in some countries has grown. The largest increase was observed in Croatia (HR) (28.1%). On the other hand, the most significant decreases were in Lithuania (LT) (-57.4%) and Slovenia (SI) (-34.6%). Between 2020 and 2021, three countries registered a reduction greater than 10%: Slovenia (SI) (-32.5%), Lithuania (LT) (-13.6%) and Slovakia (SK) (-12.8%). The most noticeable rise was in Hungary (HU) (24.7%).

Figure 66 – Percentage change of the USP post office boxes 2017-2021 and 2020-2021



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.

4.5.5. Parcel Lockers

Parcel lockers are a relatively new solution introduced in the market; accordingly, data referring to it is still limited. However, data collection on parcel lockers is already underway in some countries. The table below presents an overview of the number of USP and OPSP parcel lockers in the countries that provided these data.

Figure 67 – Parcel lockers from the USP and the other postal service providers – 2017-2021

COUNTRY	USP				OPSP			
	2017	2020	2021	% Var 2020-2021	2017	2020	2021	% Var 2020-2021
AT	-	-	117	-	-	-	595	-
BE	-	375	546	46%	-	2	2	0%
BG	-	0	0	-	67	116	152	31%
CY	3	11	11	0%	-	4	4	0%
CZ	5	0	0	-	30	158	2,481	1470%
DE	-	6,650	8,700	31%	-	1,804	3,622	101%
DK	465	1,465	1,740	19%	-	-	-	-
EE	126	255	-	-	127	444	-	-
EL	-	-	-	-	19	25	255	920%
ES	3,110	5,114	2,852	-44%	-	12,140	12,716	5%
FI	498	2,062	2,288	11%	-	-	-	-
HR	0	0	125	-	2	0	30	-
HU	50	51	51	0%	138	293	745	154%
IT	-	381	384	1%	-	2,441	3,341	37%
LT	0	272	285	5%	238	564	1,038	84%
LU	84	117	131	12%	-	1	0	-100%
LV	0	63	81	29%	-	440	739	68%
MT	-	860	989	15%	-	317	339	7%
NL	-	146	-	-	-	46	-	-
NO	-	191	2,800	1,366%	-	-	-	-
PL	118	226	207	-8%	2,600	10,776	18,212	69%
PT	-	-	128	-	-	-	66	-
RO	0	0	0	-	53	1,016	2,483	144%
RS	-	-	-	-	-	60	100	67%
SE	-	0	602	-	-	1,276	4,177	227%
SI	24	24	24	0%	56	124	210	69%
SK	45	125	145	16%	-	-	728	-
TOTAL	4,528	18,388	22,206	21%	3,330	32,047	52,035	62%

NOTES:

1. Data referring only to countries where data is available.
2. Short strokes represent data not available.
3. BE: USP: Is also being used by alternative operators/increase in mostly in smaller locker stations with fewer lockers.



CZ: OPSP: One provider in the previous year sent us wrong data about parcel lockers. Another one provider has installed huge amount of parcel lockers in the year 2021.

ES: USP: The decrease in 2021 is due to a change in USP/Incumbent strategy. Parcel lockers are no longer a priority for the USP/Incumbent.

FR: USP2017: Data available only for postal operators which have an individual licence for correspondence, granted by the NRA.

FR: USP2017: confidential.

PT: USP: Data not collected in 2020. For 2021, it was considered CTT Expresso as USP.

PT: OPSP: Data not collected in 2020. For 2021, it was considered the maximum number of lockers for each supplier.

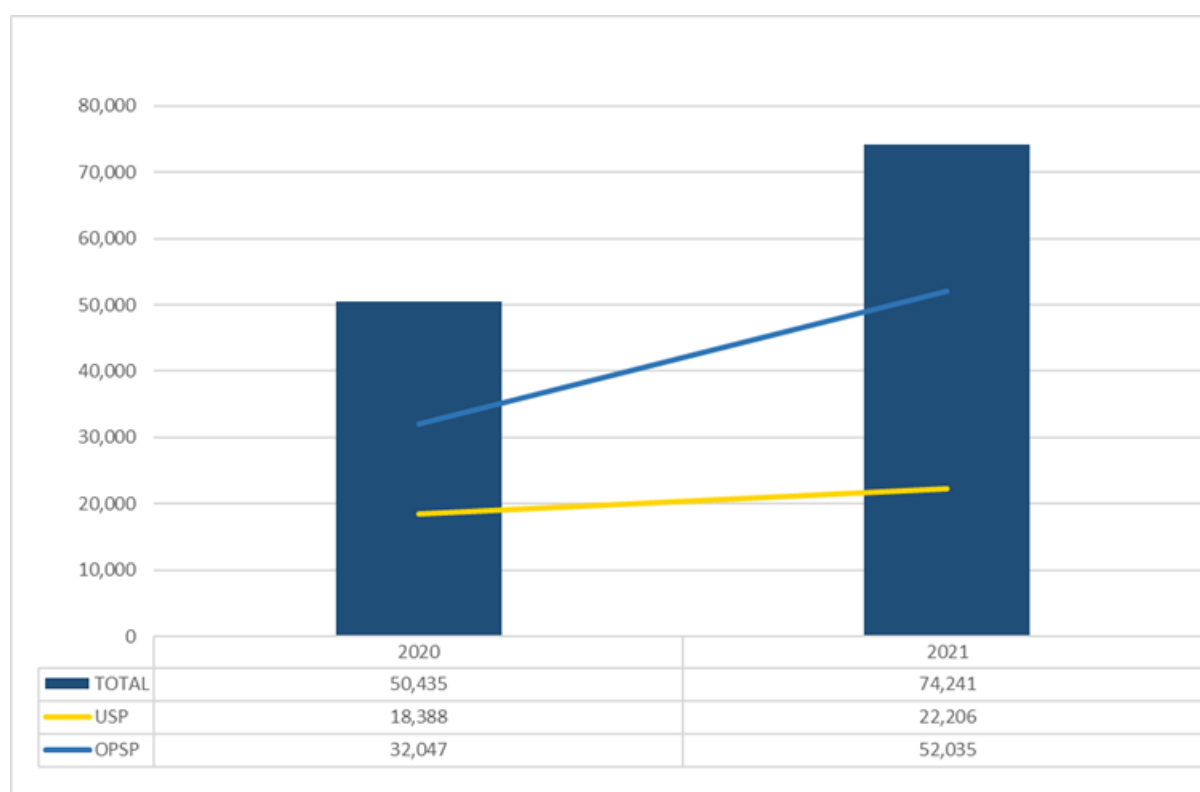
RO: OPSP: provisional.

SE: Extreme boom in establishment of parcel lockers ongoing.

Based on the available data, the number of parcel lockers is rising in most countries. In 2020-2021, the increase of parcel lockers was particularly relevant in the case of the OPSP, which has witnessed a significant percentage increase in most countries (thirteen countries present enlargements superior to 20% in 2021). The most significant growth happened in the Czech Republic (CZ) (1,470%), Greece (920%) and Sweden (SE) (227%).

Data on the number of USP parcel lockers also seems to increase in 2021. According to the available data, the following countries had a change in the number of USP parcel lockers: most significant increases in Norway (NO) (1,366%), Belgium (BE) (46%), Germany (DE) (31%) and Latvia (LV) (29%).

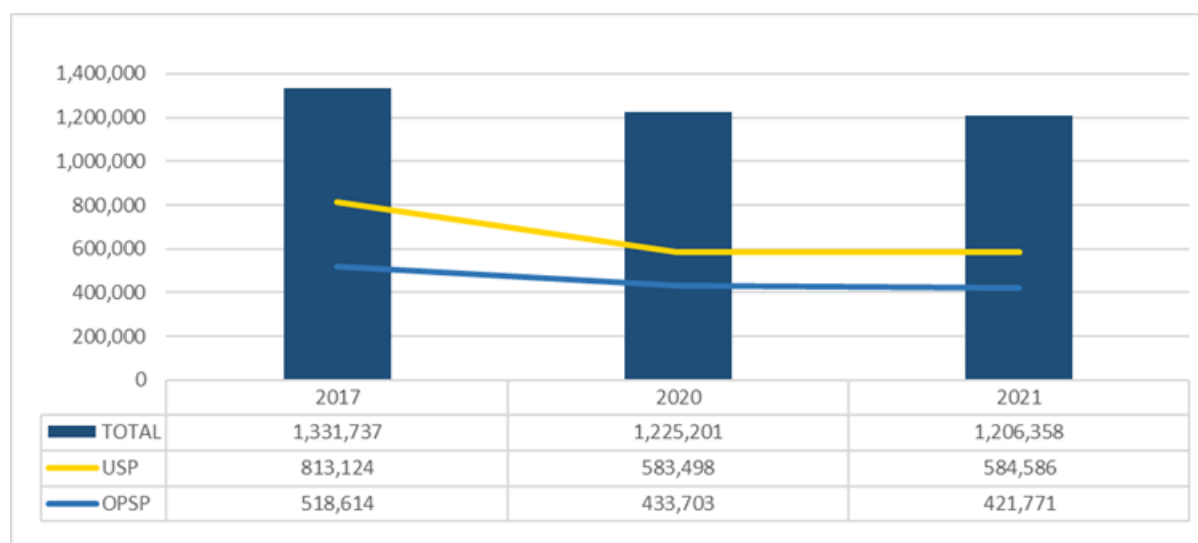
Figure 68 – Total number of parcel lockers by USP and OPSP: 2020-2021



4.6. Employment in the postal sector

Across all ERGP countries that reported data in 2017-2021, total employment decreased by approximately 9.4%. As seen below, the drop is the gradual decline in USP employment, which has decreased by about 28.1%. Also, there was a fall in OPSP employment, which dropped by around 18.7%. In 2021, the total number of people employed by the USP still notably outweighs the number employed by the OPSP.

Figure 69 – Total employment by USP and other postal service providers (number of people employed): 2017-2021

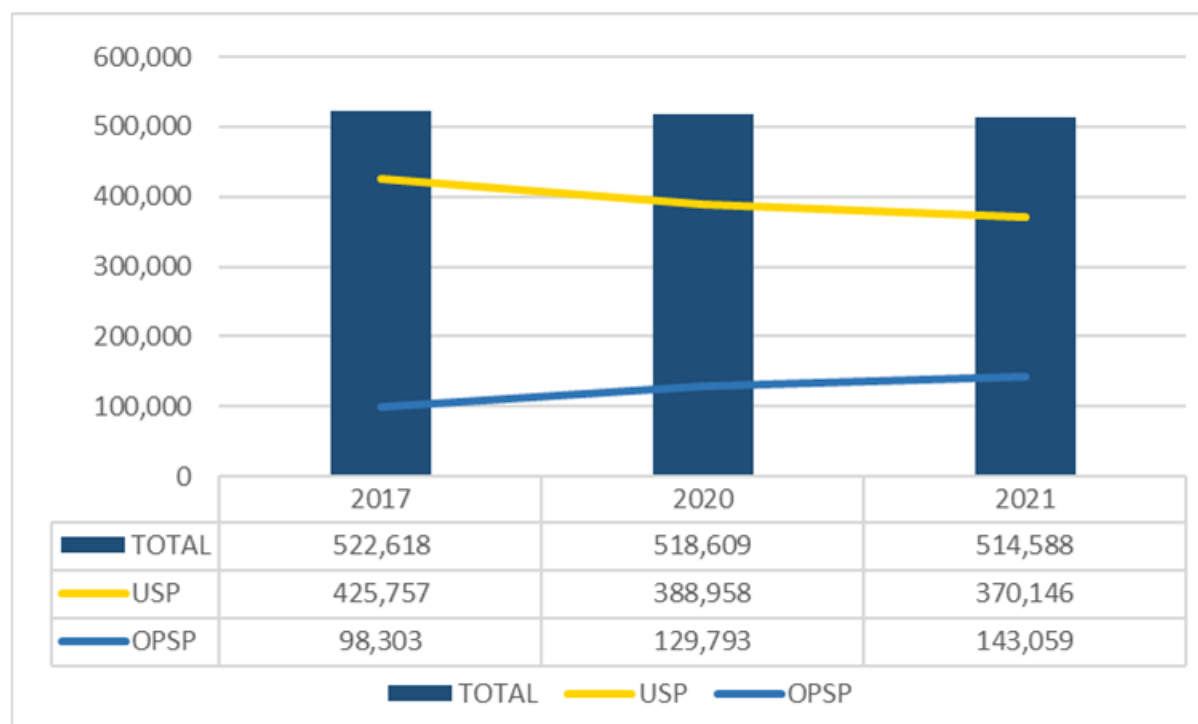


NOTES:

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, IE, IT, ME, NL. Contains some estimates according to section on methodology.
2. Where no data is available for 2017, in the total it is used data for the first year for which there is data.
3. Total is not the sum of USP and OPSP because some of the countries provide only total.
4. BE: Source : National Social Security Office. Only takes into account direct employment, so no subcontractors or temporary workers were taken into account.
 DK: 2021 data not available yet.
 EL: It includes the franchisees who work exclusively for the provider.
 ES: December 31.
 FR, MT: confidential data.
 HU: Calculated data due to national calculated method.
 NO: USP: Number of employees per 31.12.2021.
 RO: OPSP: provisional.
 SE: OPSP: Note: do not include PDSPs without postal license.
 SK: OPSP: without self-employed persons.

Regarding the total full-time equivalents data, some countries started to collect this data in the past few years. Therefore, for 2017, data for the first available year is used. Regarding this total amount of full-time equivalents, in 2021, it is 1.5% lower than in 2017. Total full-time equivalents by USP decreased by 13.1%, and OPSP jumped by 45.5% in 2017-2021.

Figure 70– Total Full-Time Equivalents by USP and other postal service providers: 2017-2021



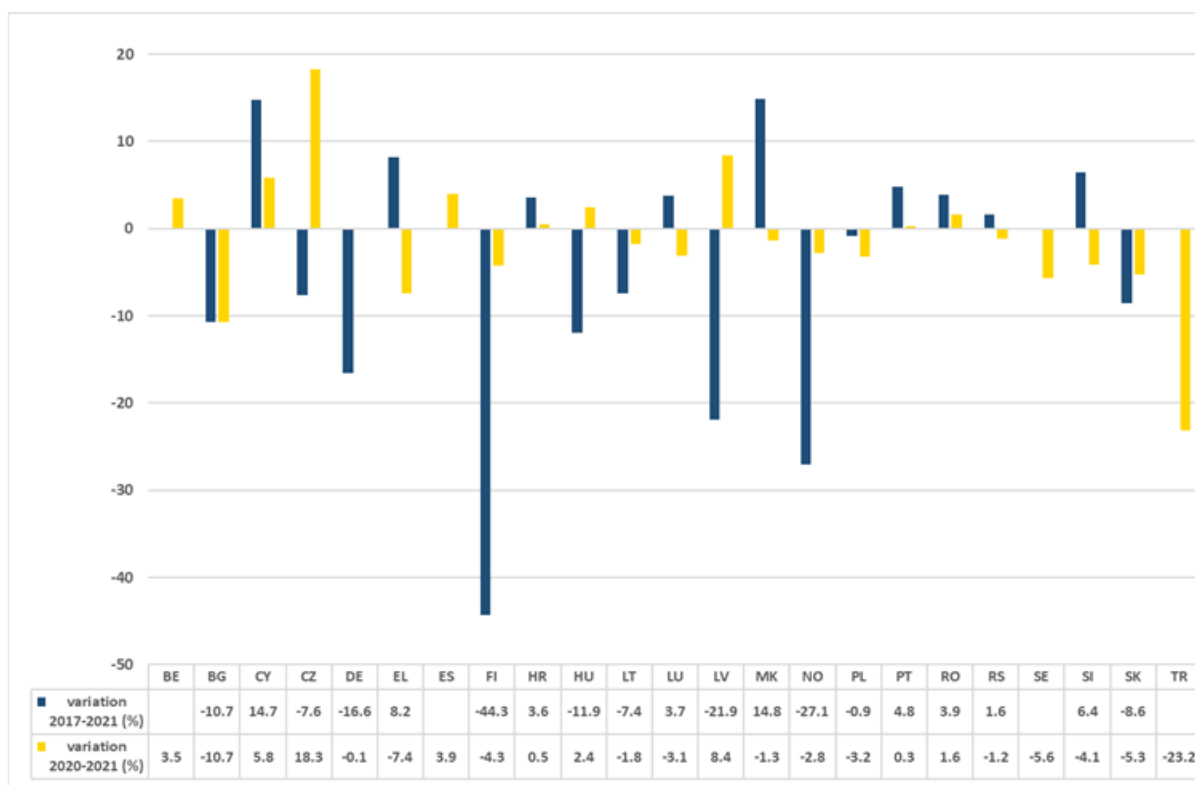
NOTES:

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, LV, ME, NL, PT, RO, RS, SE, SI, TR. Contains some estimates according to section on methodology.
2. Where no data is available for 2017, it is used data for the first year for which there is data.
3. Where no data is available for 2021, it is used data for the last year for which there is data.
4. BE: Source : National Social Security Office. Only takes into account direct employment, so no subcontractors or temporary workers were taken into account.
 DK: 2021 data not available yet.
 EL: It includes the franchisees who work exclusively for the provider.
 NO: USP: The number for 2020 has been corrected from 12 377 to 13 135. Hired consultants and temps are not counted in the number of employees but are included in the number of FTEs. We don't have the FTEs of the USP's Norwegian branch only, but we estimate about 10 000. The rest of the FTEs are mainly in the other Nordic countries.
 SK: OPSP: without self-employed persons.

When analysing the employment data per country, the figures indicate drops in total employment in the postal sector from 2017 to 2021. The most significant declines were observed in Finland (FI) (-44,3%) and Norway (NO) (-27.1%). Conversely, the most noticeable growth in total employment in this same period was in North Macedonia (MK) (14.8%) and Cyprus (CY) (14.7%).

A closer look into the evolution between 2020 and 2021 concludes that there wasn't a meaningful change in total employment in most countries, with most observable variations staying below 10% in absolute value (positive or negative). The exceptions are Turkey (TR) (with a decrease of 23.2%), the Czech Republic (CZ) (with an increase of 18.3%) and Bulgaria (BG) (with a decrease of 10.7%).

Figure 71– Total employment variation (%) in 2017-2021 and 2020-2021

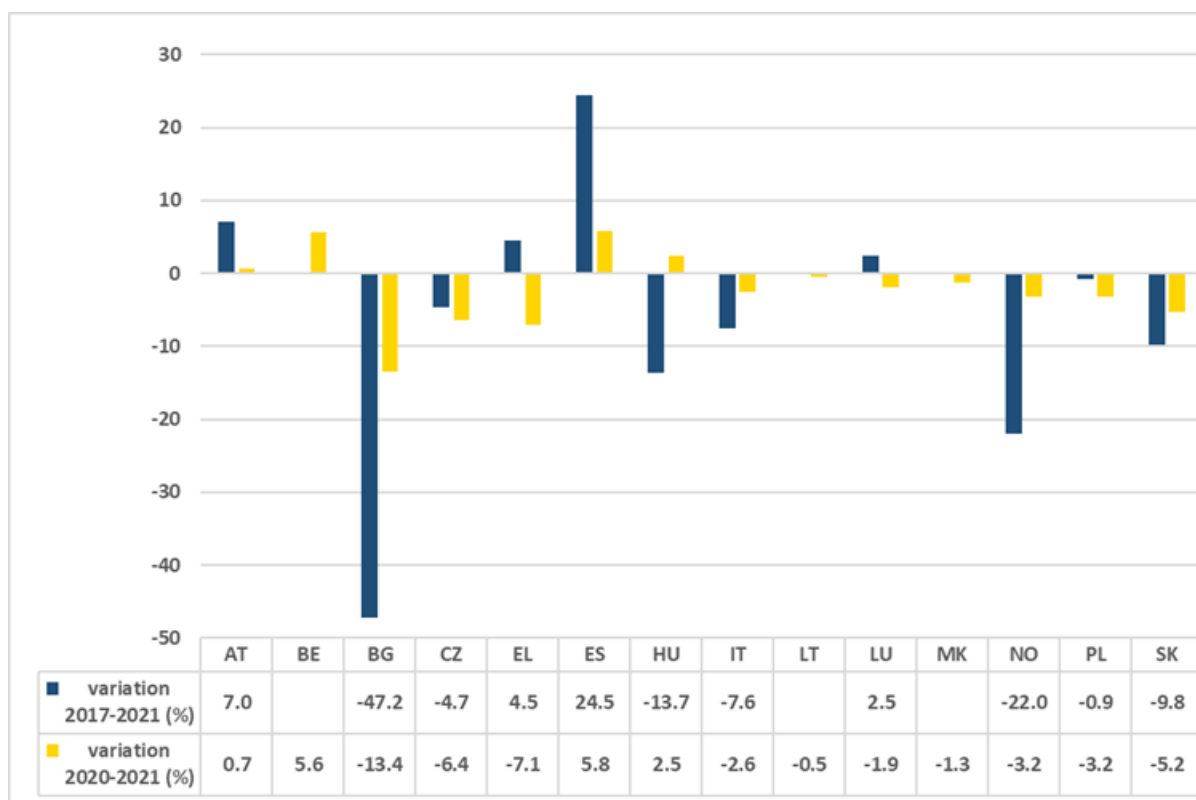


NOTES:

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 2021 is not available, “variation 2017-2021” represents variation observed until 2020.
4. In cases where no data is available for 2017, “variation 2017-2021” represents variation between 2021 and the first year for which there is data.

As mentioned above, there is not much data about total full-time equivalents. However, the available data showed no significant changes in total full-time equivalents in most countries between 2017-2021 and 2020-2021. In 2017-2021, the highest variations were in Bulgaria (BG) (a fall of 47.2%), Norway (NO) (a fall of 22.0%) and Spain (ES) (a growth of 24.5%). In 2020-2021, the most notable variations stayed below 10% in absolute value (positive or negative) except Bulgaria (BG) (a fall of 13.4%).

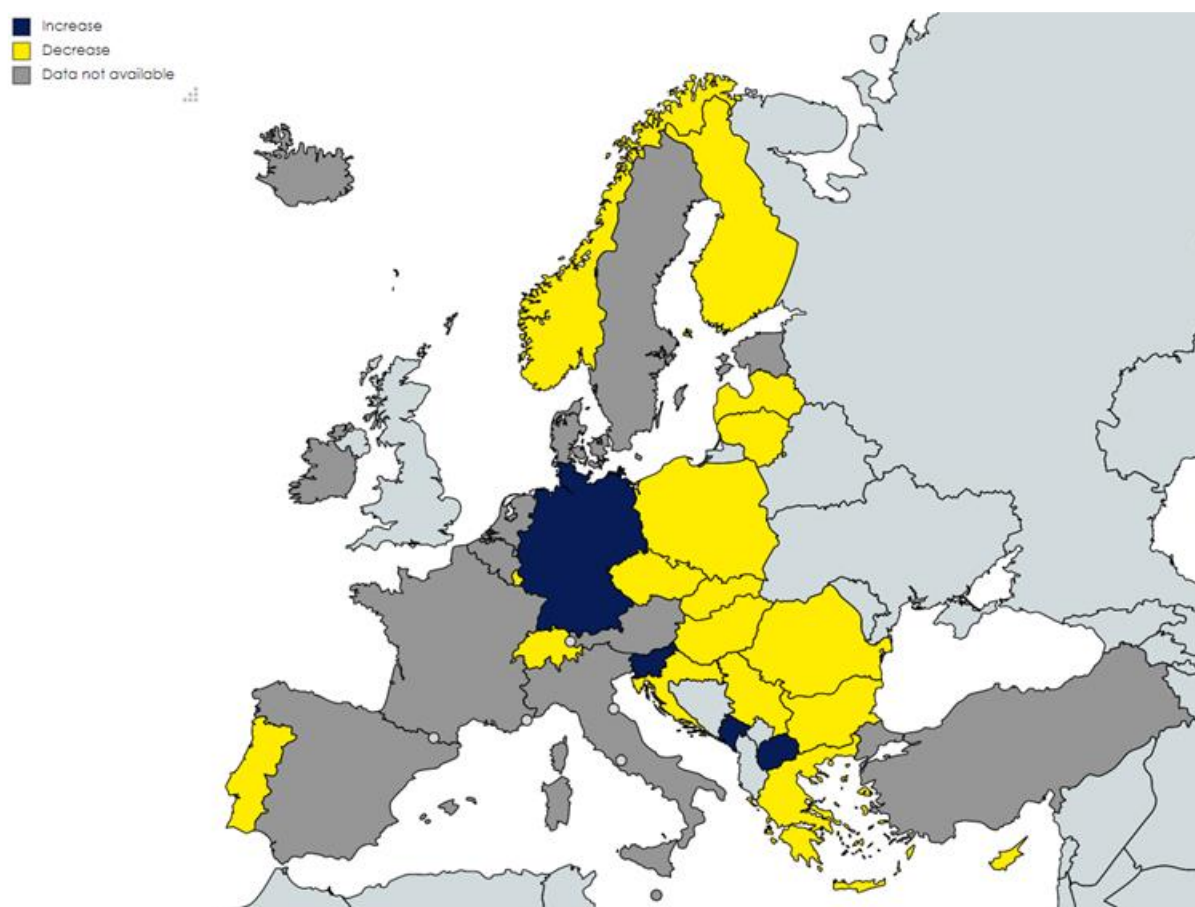
Figure 72–Total Full-Time Equivalents variation (%) in 2017-2021 and 2020-2021



NOTES:

1. Information is shown only from the countries that provided data for total full-time equivalents and when the data is not confidential.
2. Blank cells represent data not available.

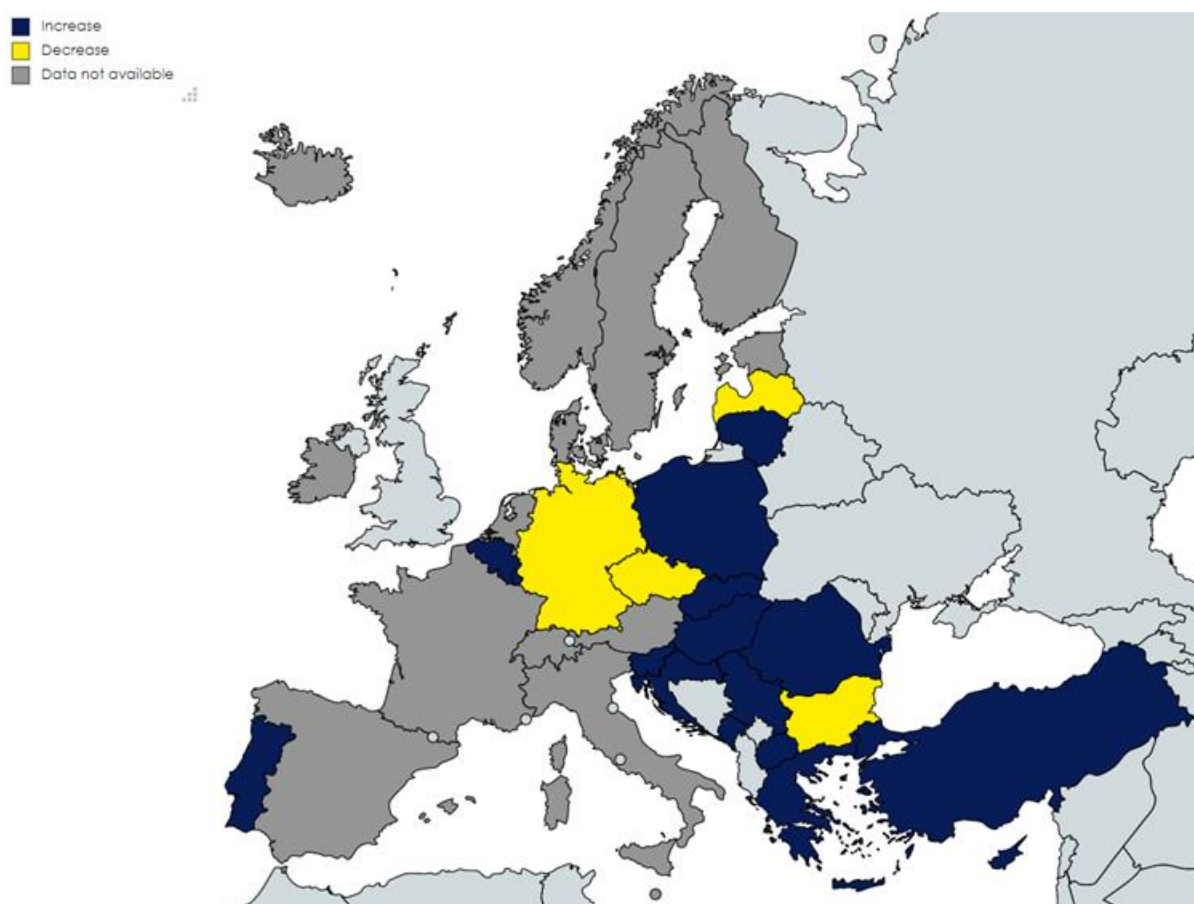
As illustrated in the following figure, the variation in USP employees is falling in most countries between 2017 and 2021.

Figure 73 – Employment variation by the USP: 2017-2021

NOTES:

1. Data referring only to countries where data is available regarding employment by USP. Contains some estimates according to the section on methodology.

Germany (DE) recorded the highest increase in USP employees between 2017 and 2021, only 12.0%. The variation in the number of OPSP employees between 2017 and 2021 is dramatically increasing. The most noticeable growth occurred in Hungary (HU) (237.8%). As explained in the previous ERGP report, the reason for such a jump is that due to principles of data collection according to the Parcel Regulation, the Hungarian NRA modified its data collection system for requesting employment data, as the determination of parcel delivery service providers covered by the Parcel Regulation depends on the number of employees. Given that the Parcel Regulation emphasises the need to include subcontractors in the number of employees, the Hungarian NRA will also request and calculate them. Based on the first new type of data collection and consultations with the service providers, persons employed in customer services or the business, contrary to the previous interpretation, are now reported as employed to the Hungarian NRA. However, it is typical that smaller companies or self-employed individuals were contracted to provide delivery tasks, which were not included in the number of employees in the previous data collection. Since 2019, operators have reported workers, including their subcontractors (as far as they can estimate the number of staff).

Figure 74 – Employment variation by the OPSP: 2017-2021

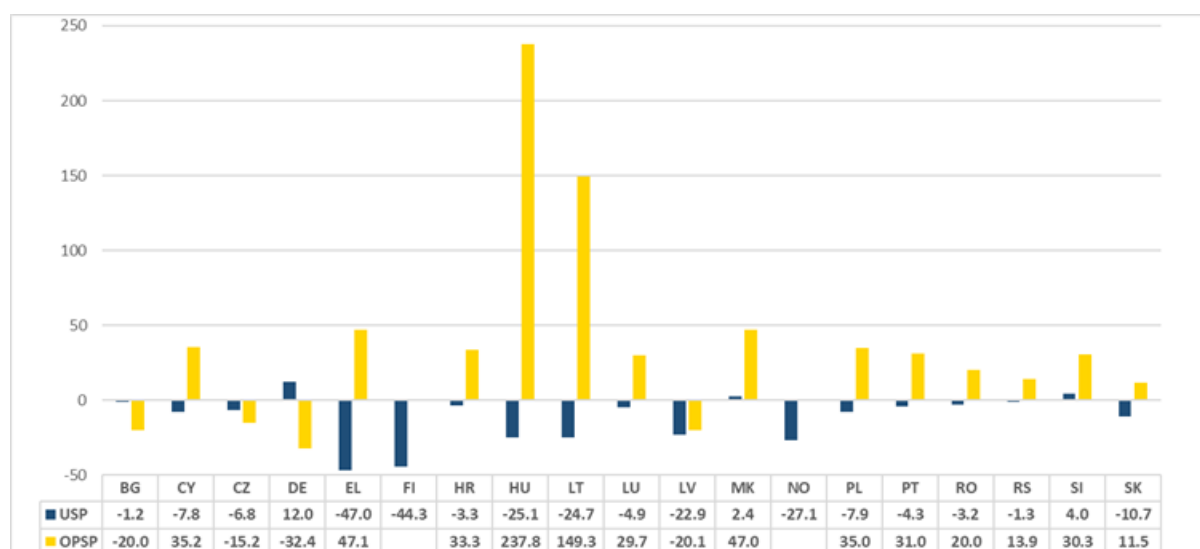


NOTES:

1. *Data referring only to countries where data is available regarding employment by OPSP. Contains some estimates according to the section on methodology.*

Other significant increases in OPSP employees were registered in Lithuania (LT) (149.3%), Greece (EL) (47.1%) and North Macedonia (MK) (47.0%). On the other hand, despite growth in most countries, there are significant falls in Germany (DE) (32.4%), Latvia (LV) (-20.1%), Bulgaria (BG) (-20.0%) and the Czech Republic (CZ) (-15.2%). In the Czech Republic (CZ), the decrease in OPSP has been caused by one provider that delivers letters primarily.

Figure 75–Total employment variation (%) by USP and OPSP: 2017-2021

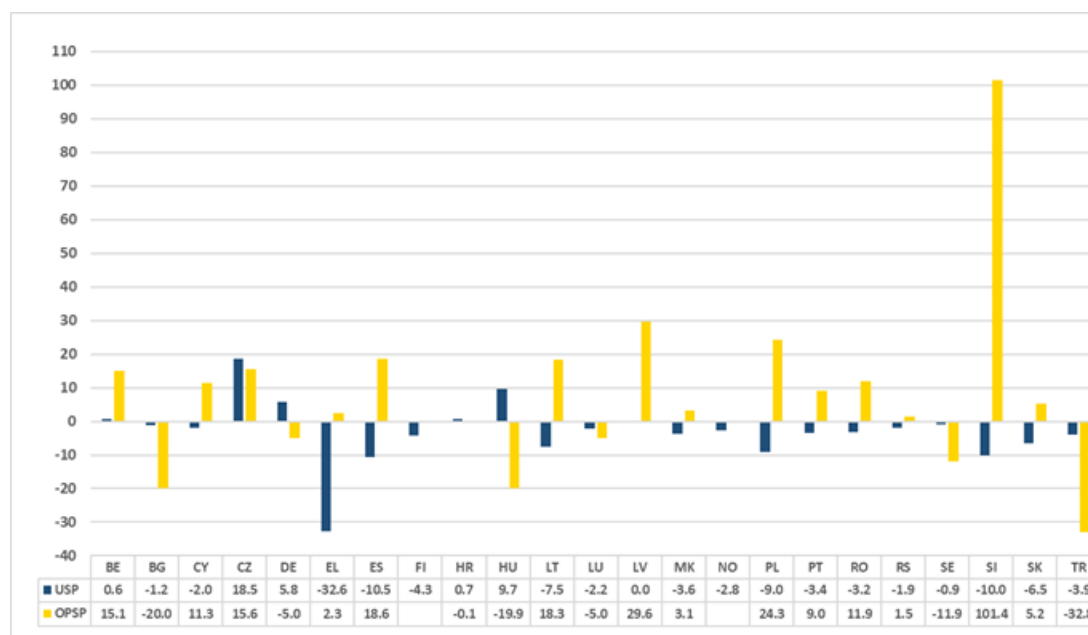


NOTES:

1. Data referring only to countries where data is available regarding employment both in USP and OPSP and where the data is not confidential. Contains some estimates according to section on methodology.

Where data is available, the total employment variation of USPs in 2020-2021 has mostly remained stable, while OPSPs fluctuated. The highest rise of USP was in the Czech Republic (CZ) (18.5%), of OPSP – in Slovenia (SI) (101.4%). On the other hand, the most significant fall of the USP was in Greece (EL) (-32.6%), for the OPSP – in Turkey (TR) (-32.8%).

Figure 76 – Total employment variation (%) by USP and OPSP: 2020-2021



NOTES:

1. Data referring only to countries where data is available regarding employment by both, USP and OPSP, and where the data is not confidential. Contains some estimates according to the section on methodology.
2. Blank cells represent data not available or confidential.

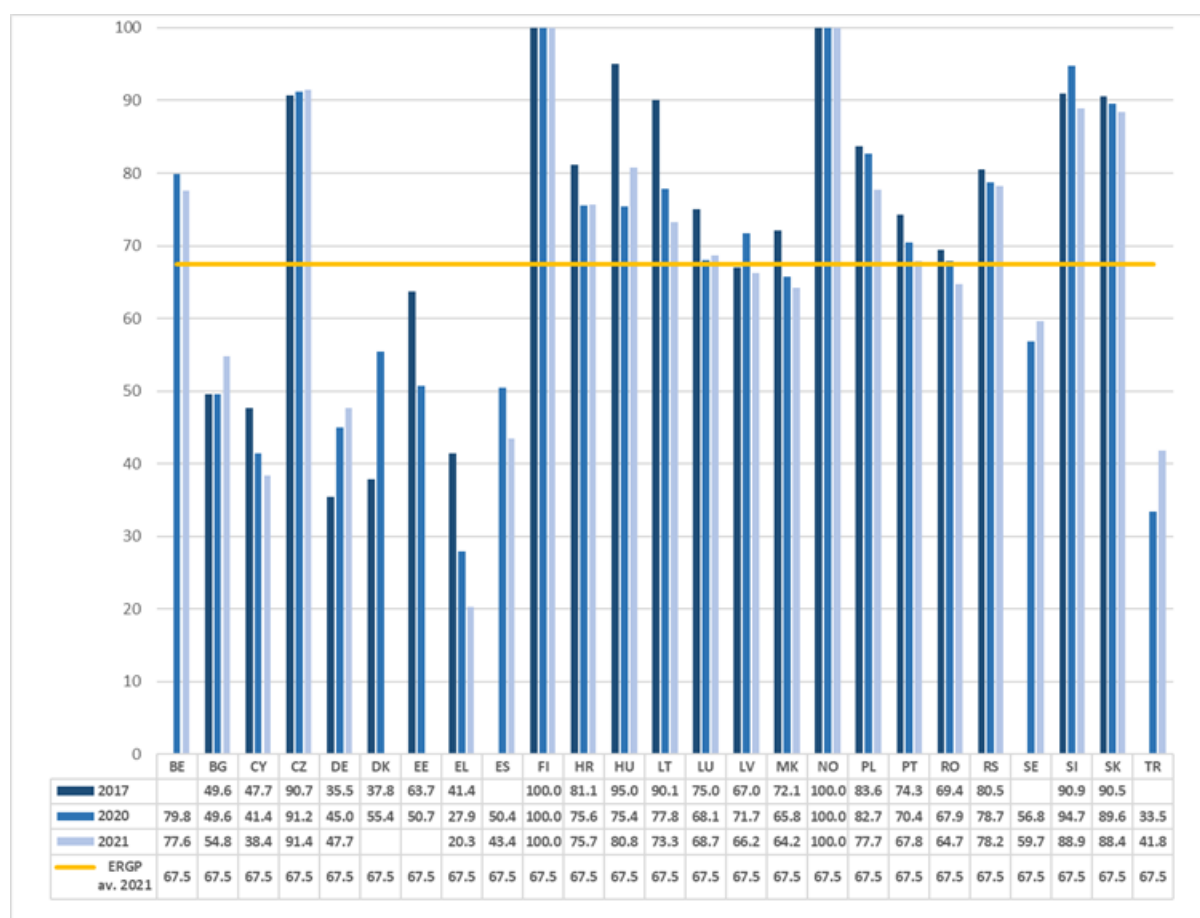
As is notable in the following figure, the USP has more employees than the OPSP for most countries analysed, with no significant changes between the situations in 2017 and 2021 for most countries. In 2021, there were only five countries – Cyprus (CY), Germany (DE), Greece (EL), Spain (ES) and Turkey (TR) – where more than half of all employees were employed by OPSP. Nevertheless, in a minority of the countries, there have been drops in the share of USP employment from 2017 to 2021 (for example, in Greece (EL) -21.1 percentage points, Lithuania (LT) -16.8 percentage points, Hungary (HU) -14.2 percentage points, Cyprus (CY) -9.3 percentage points, North Macedonia (MK) -7.8 percentage points³²), while in some others, undistinguished growth has taken place (the most substantial increase was in Germany (DE) (12.2 percentage points)). Even though there has been a low growth in the share of USP employment in some countries, most countries possessed a fall in the percentage of USP employment.

Finland (FI) and Norway (NO) both indicate a full share of the total employment for the USP (100%). The next highest share of USP employment on total employment in the postal sector in 2021 is noticeable in the Czech Republic (CZ), 91.4%; in 2017, it is in Hungary (HU) – 95.0%. On the other hand, the lowest shares of USP employment in 2021 are noticeable in Greece (EL) (20.3%), Cyprus (CY) (38.4%), Turkey (TR) (41.8%) and Spain (ES) (43.4%).

On average, the share of the USP employment from the total postal employment decreased from 74.3% in 2017 to 67.5% in 2021.

³² Due to rounding issues, there is a discrepancy between the percentage point change in the text and the graph for North Macedonia (MK).

Figure 77 – Share of USP employment on Total postal employment in 2017-2021 (%)



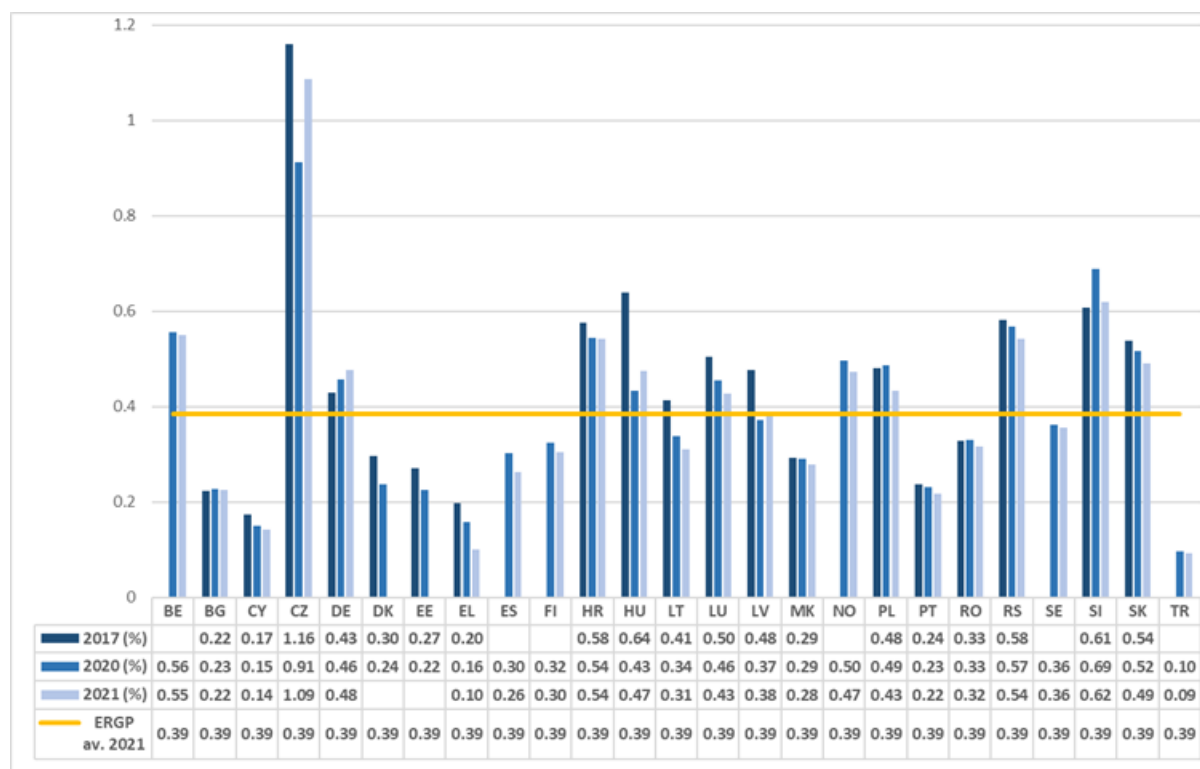
NOTES:

1. Data referring only to countries where data is available regarding employment by USP and OPSP and where the data is not confidential. Contains some estimates according to section on methodology.
2. Blank cells represent data not available.

In most countries, the proportion of USP employment to the total country employment has dropped since 2017, as shown in the chart below. In 2021, USP employment accounted for less than 1% of total country employment in all the countries, except in the Czech Republic (CZ), with 1.09%. The lowest proportion was in Turkey (TR) (0.09%). Also, there were only two countries where the share of USP total employment increased from 2017 to 2021 – Germany (DE) from 0.43% to 0.48% and Slovenia (SI) from 0.61% to 0.62%.

On average, the USP employees as a proportion of the country's total employment decreased from 0.47% in 2017 to 0.39% in 2021. However, 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 country's total employment. Hence, any evolution should be considered indicative only.

Figure 78– People employed by the USP as a proportion of total employment of the country (%)

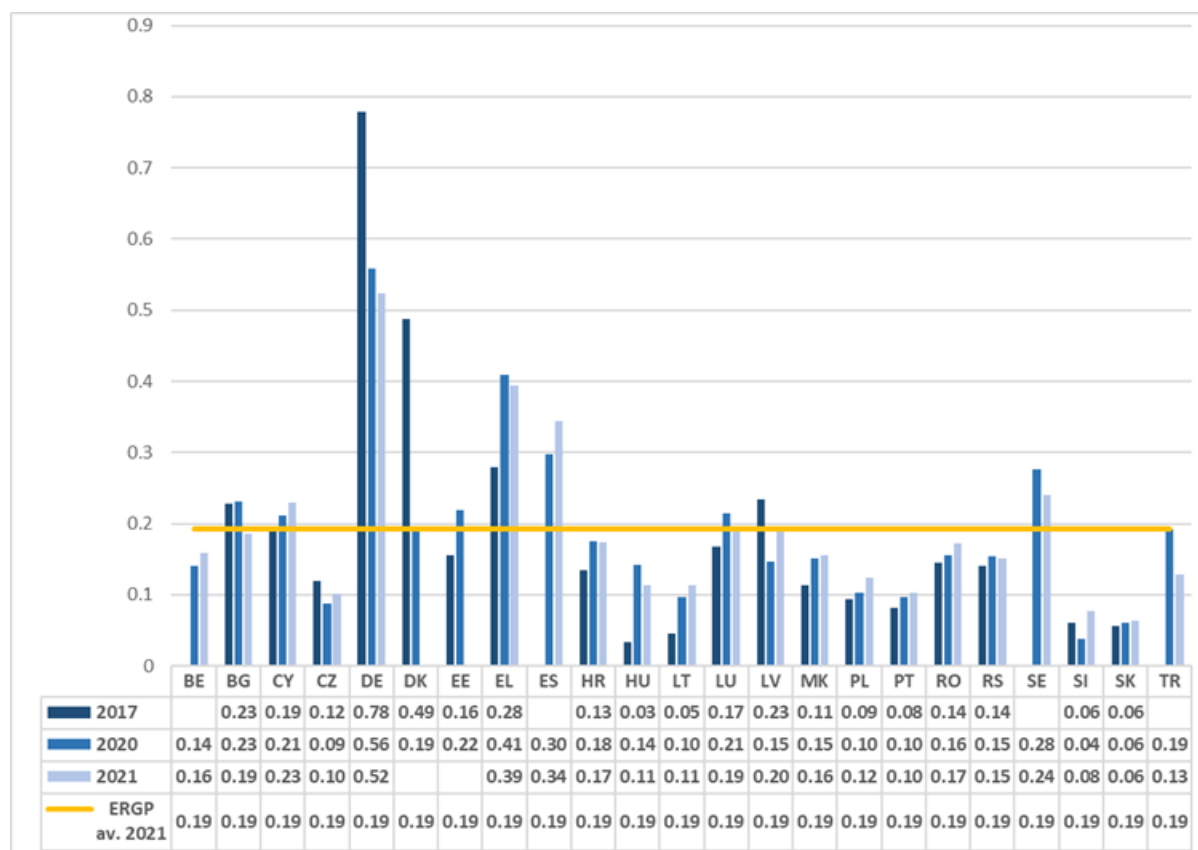


NOTES:

1. Employment data from Eurostat (total employment resident population between 15 and 64 years old). Extracted on 2022-08-03 from: https://ec.europa.eu/eurostat/databrowser/view/LFSI_EMP_A_custom_3153496/default/table?lang=en The method of recording employment may differ between NRAs and Eurostat.
2. Data referring only to countries where data is available and is not confidential regarding employment in USP. Contains some estimates according to section on methodology.
3. Blank cells represent data not available.

On the other hand, there is no clear trend of the evolution of the OPSP share of employment on total country employment. There were declines in some countries while in some others a growth. In 2021, the country where the share of OPSP employment in the country's total employment is highest was Germany (DE) (0.52%), while the lowest share is noticeable in Slovakia (SK) (0.06%). 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 country's total employment. Hence, any evolution should be considered indicative only.

Figure 79 – People employed by other postal services providers as a proportion of total employment (%)



NOTES:

1. Employment data from Eurostat (total employment resident population between 15 and 64 years old). Extracted on 2022-08-03 from: https://ec.europa.eu/eurostat/databrowser/view/LFSI_EMP_A_custom_3153496/default/table?lang=en The method of recording employment may differ between NRAs and Eurostat.
2. Data referring only to countries where data is available and is not confidential regarding employment in OPSP. Contains some estimates according to section on methodology.
3. Blank cells represent data not available.

4.7. Investment in the postal sector

In the last years, postal providers have been transferring the focus on investment to parcels and betting on automation, on green forms of transport (Sustainability agenda). Given this, the USP and OPSP are investing in the sector, as shown in the figure below. Nevertheless, data about Investment in the postal industry is minimal, and few NRAs are collecting this data. The following table presents an overview of total investment by USP and OPSP in the countries that could provide this data.

Figure 80 – Total investment by USP and OPSP (thousands, EUR)

Country	USP				OPSP			
	2017	2020	2021	Var. 2017-21 (%)	2017	2020	2021	Var. 2017-21 (%)
AT	107,792	150,479	210,327	95%	-	-	-	-
BG	-	988	0	-	648	17,601	22,264	3,336%
CY	-	-	-	-	-	1,809	1,886	-
CZ	19,385	7,618	13,071	-33%	4,582	7,287	13,678	199%
EE	-	467	-	-	-	-	-	-
EL	-	83,891	72,999	-	-	78,002	767,405	-
ES	641,000	720,000	787,000	23%	-	-	-	-
FR	-	-	5	-	-	-	296	-
MK	25,936	25,655	17,382	-33%	12,676	8,321	8,106	-36%
HR	-	6,606	7,305	-	-	-	-	-
HU	19,300	45,300	33,200	-	-	-	-	-
IE	403,000	613,000	706,000	75%	35,599	122,500	75,000	111%
IT	-	18,490	6,261	-	-	3,875	13,136	-
LT	-	16,348	-	-	-	6738	-	-
PT	-	8,531	1,625	-	-	49,559	55,246	-
RO	4,628	7,078	3,958	-14%	8,678	4,720	11,496	32%
RS	-	7,426	9,628	-	-	-	-	-
SK	1,311,441	1,864,609	2,042,161	56%	72,440	333,826	1,012,256	1,297%
TOTAL	107,792	150,479	210,327	95%	-	-	-	-

NOTES:

1. AT: Total values (no split between USP & OPSP)
2. BE: Confidential data
3. HU: capitalised investment for the year
4. IE: 'Additions/ Disposals/ Other: Land & Buildings, Motor Vehicles, Computer & Other Equipment
5. 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.
6. RO: provisional for OPSP
7. Source for currency exchange: https://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=ert_bil_eur_d&lang=en (02/01/2018 & 02/01/2019)

8. *CH, DE, DK, FI, ME, LU, LV, MT, NL, NO, PL, SE, SI, TR: no data provided/ not available data*
9. *Blank cells represent data not available.*

In most countries, from 2017-2021, investment is increasing by both – USP and OPSP. The highest increase by USP is in Austria (AT) (95%), and the highest increase by OPSP is in Bulgaria (BG) (3,336%). However, in some countries, there were decreases; the highest reductions were in the Czech Republic (CZ) and Croatia (HR) by USP (33%) and Croatia (HR) by OPSP (36%).

Furthermore, it is worth mentioning that in most 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, particularly 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.

4.1 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 correspondence³³, printed objects³⁴ (books, catalogues, newspapers, periodicals), postal parcels³⁵, 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

³³ 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”.

³⁴ 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.

³⁵ 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 (...)”.

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. 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
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	No	No weight specified	
FI				
FR	Yes	No	2 kg	
MK	Yes	No		
HR	Yes	No	No weight specified	
HU	Yes	No	2 kg	
IE	No	Yes ⁴		
IT	Yes	No	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				
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	

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 weigh up to 5 kg.

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
CY	Yes	Yes	Yes	Yes	2 kg	2 kg	2 kg	2 kg
CZ	Not defined ¹	Not defined ²	Not defined ³	Not defined ⁴				
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
MK	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 ⁵			
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
MT	Yes	Yes	Yes	Yes	2 kg	2 kg	2 kg	2 kg
NL	Yes	No	Yes	Yes				
NO								
PL ⁶	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 ⁷	Not defined ⁸	Not defined ⁹	Not defined ¹⁰	2 kg	2 kg	2 kg	2 kg

¹ 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.

² 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.

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

⁶ 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".

⁷ SE: Yes if contained in an envelope or other kind of wrapping, featuring a postal address.

⁸ SE: Yes if contained in an envelope or other kind of wrapping, featuring a postal address.

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.

SI	Yes ¹¹	Yes	Yes	Yes	10 kg	10 kg	10 kg	10 kg
SK	No	No	Yes	Yes			2 kg	2 kg

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 ¹²	Yes	Yes	31.5 kg	31.5 kg
BE	Yes	Yes	31.5 kg	31.5 kg
BG	Yes	Not defined	20 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 ¹³	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	
MK	Yes	Yes		
HR	Yes	Yes	No weight specified	No weight specified
HU	Yes ¹⁴	Yes ¹⁵	40 kg	40 kg
IE	Yes	No	20 kg	
IT	Yes	Yes	31.5 kg	31.5 kg
LT	Yes	Yes	50 kg	50 kg
LU ¹⁶	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 ¹⁷	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

¹¹ SI: USO 2 kg.

¹² AT: There is no differentiation between express and non-express.

¹³ This refers to postal providers under General Authorisation (courier).

¹⁴ HU: It applies for US parcel without any value-added service.

¹⁵ 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. 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.

¹⁶ LU: There is no distinction between express and non-express.

¹⁷ PL: Formally there is no legal definition of an express postal parcel; there is only a definition of a "courier item" that includes both letters and parcels.

Figure A. 4. Express mail

- Per country

COUNTRY	Express mail	
	Services included in the definition of postal services	Upper weight limit
AT ¹⁸	Yes	
BE	Yes	31.5 kg
BG	Yes	31.5 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	
MK	Yes	
HR	Yes	No weight specified
HU	No	
IE	No	
IT	Yes	No weight specified
LT	Yes ¹⁹	5 kg
LU	Not defined	No weight specified
LV	No	
MT	Yes	20 kg
NL	No	
NO		
PL	Yes ²⁰	No weight specified
PT	Yes	
RO	Yes	50 kg
RS	No	No weight limit
SE ²¹	Not defined	
SI	Yes	50 kg
SK	Yes	50 kg

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
CY	Yes	2 kg
CZ	No	
DE	No	
DK	No	
EE	No	

¹⁸ AT: There is no differentiation between express and non-express.

¹⁹ 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 weigh up to 5 kg.

²⁰ PL: Defined as courier item.

²¹ SE: There is no definition of express, such items fall under the general letter definition if addressed.

EL	No	
ES	No	
FI		
FR	No	
MK	No	
HR	No	
HU	No	
IE	No	
IT	No	
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	

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.
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	<ul style="list-style-type: none"> • Postal services shall mean the following services provided on a profit oriented basis: <ol style="list-style-type: none"> a. the conveyance of letter post items; (...) • 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. 	
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.
MK		
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		
IT	According to Law 261/99 (Art.2, lett. "g"), Item of correspondence is a communication in written form, also generated by telematics means, 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, excluding books, catalogs, newspapers, periodicals and similar.	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 10000 addressees.
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 addressees, 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		

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 the address of the sender and addressee indicated on the item itself.	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.	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.	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.
CY				
CZ				
DE	<ul style="list-style-type: none"> Postal services shall mean the following services provided on a profit oriented basis: <ul style="list-style-type: none"> (...) 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. 			
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	Books, catalogues, newspapers and periodicals are considered as postal items. Postal item is any item intended to be delivered at	Books, catalogues, newspapers and periodicals are considered as postal items. Postal item is any item intended to be delivered at	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.	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.	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.	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.
MK				
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				
IT	There is no specific definition.	There is no specific definition.	There is no specific definition.	There is no specific definition.
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,	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,	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,	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.	catalogues, newspapers, periodicals and postal packages containing merchandise with or without commercial value.	catalogues, newspapers, periodicals and postal packages containing merchandise with or without commercial value.	catalogues, newspapers, periodicals and postal packages containing merchandise with or without commercial value.
SK				

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.
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	<ul style="list-style-type: none"> Postal services shall mean the following services provided on a profit oriented basis: <ul style="list-style-type: none"> (...) b. the conveyance of addressed parcels weighing not more than 20kg each; (...) 	
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.
MK		
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

		<p>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.</p> <p>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.</p> <p>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.</p>
IE		
IT	Postal parcel : a postal item containing goods with or without commercial value, other than an item of correspondence, with a weight not exceeding 31,5 kg;	Postal parcel : a postal item containing goods with or without commercial value, other than an item of correspondence, with a weight not exceeding 31,5 kg;
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		

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").
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	The conveyance of letters shall also include the item forms (...) 4. express delivery item (letter item that is delivered by special delivery staff as soon as possible after arrival at a delivery point). (Section 1 Postal Universal Service Ordinance)
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.
MK	
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	
IT	There is no legal definition of express mail in the postal law. Express mail is, however, considered a postal service.
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	

Figure A. 10. Postal service definitions – UNADDRESSED MAIL

COUNTRY	Unaddressed mail
AT	
BE	
BG	There is no definition in the Postal services Act.
CY	
CZ	
DE	
DK	
EE	
EL	
ES	
FI	
FR	There is no legal definition.
MK	
HR	
HU	
IE	
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	

The following figures identify 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

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	
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			
MK	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			
IT	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	

4.2 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 and information regarding the upper weight limits associated with 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 ⁶³	Yes ⁶⁴	Yes ⁶⁵	2 kg	2 kg	2 kg
BE	Yes	Yes	Yes	2 kg	2 kg	2 kg
BG	Yes	Yes ⁶⁶	Yes	2 kg	2 kg	2 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
MK	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
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
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

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

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

⁶⁵ AT: Not included in USO if posted in distribution centers.

⁶⁶ 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.

⁶⁷ IE: Including Letters and Packets.

⁶⁸ IE: Including Letters and Packets.

⁶⁹ IE: Including Letters and Packets.

⁷⁰ PT: Excluding direct mail.

⁷¹ PT: Excluding direct mail.

⁷² PT: Excluding direct mail.

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 ⁷³	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	
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	
CZ	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined	Not defined													
DE ⁷⁴	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes													
DK	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													
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	
ES	No	No	No	No	No	No	No	No	No	No	No													
FI	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	
MK	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes													
HR	No	No	No	No	No	No	No	No	No	No	No													
HU ⁷⁵	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		5 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	
LT	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	
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	
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	
NL	No	Yes	Yes	No	No	No	No	No	No	No	No													
NO	No	No	No	No	No	No	Yes	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													
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	
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	
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	
SE ⁷⁶	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	
SK	No ⁷⁷	No ⁷⁸	No ⁷⁹	No ⁸⁰	No ⁸¹	No ⁸²	No	No	No	No	No	No												

⁷³ AT: These items are not included in USO if posted in distribution centers.

⁷⁴ DE: These items are included if delivery is provided by an operator who also delivers letters / parcels up to 20 kg.

⁷⁵ HU: These items are not a specific postal service category and are treated as letters.

⁷⁶ SE: These items are included if contained in an envelope or other kind of wrapping, featuring a postal address.

⁷⁷ SK: Books and catalogues do not have special postal service category or definition. They can be content of letters or parcels.

⁷⁸ SK: Books and catalogues do not have special postal service category or definition. They can be content of letters or parcels.

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.

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 ⁸³	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
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			
FI	No	Yes	No	No	No	No						
FR	Yes	Yes	Yes	No	No	No	20 kg	20 kg	20 kg			
MK	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			
IT	Yes ⁸⁴	Yes	Yes	No	No	No	20 kg	20 kg	20 kg			
LT	Yes	Yes	Yes	No	No	No	10 kg	10 kg	20 kg ⁸⁵			
LU	Yes	Yes	Yes	Yes	Yes	Yes	10 kg	10 kg	10 kg ⁸⁶	10 kg	10 kg	10 kg ⁸⁷
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			
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 ⁸⁸	Not defined ⁸⁹	Not defined ⁹⁰	20 kg	20 kg	20 kg			
SI	Yes	Yes ⁹¹	Yes	No	No	No	10 kg	10 kg	20 kg			
SK	Yes	Yes	Yes	No	No	No	10 kg	10 kg	20 kg			

⁸³ AT: There is no differentiation between express and non-express. Not included in USO if posted in distribution centers.

⁸⁴ IT: Within USO, parcels are up to 20kg, but by Ministerial definition upper weight limit for parcels (in general) are up to 30kg.

⁸⁵ LT: Only for parcels sent within the EU.

⁸⁶ LU: 20 kg if originating from an EU Member State.

⁸⁷ LU: 20 kg if originating from an EU Member State.

⁸⁸ SE: No definition of express, such items fall under the general parcel definition if addressed.

⁸⁹ SE: No definition of express, such items fall under the general parcel definition if addressed.

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

⁹¹ SI: Could be extended up to 20 kg.

Figure A. 15. US - Express mail

- Per country

COUNTRY	In the scope of the US			Upper weight limit		
	Domestic	International Outbound	International Inbound	Domestic	International Outbound	International Inbound
AT ⁹²	No	No	No			
BE	No	No	No			
BG	No	No	No	5 kg	5 kg	5 kg
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			
FI	No	No	No			
FR	No	No	No			
MK	No	No	No			
HR	No	No	No			
HU	No	No	No			
IE	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 ⁹³	Not defined	Not defined	Not defined			
SI	No	No	No			
SK	No	No	No			

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 ⁹⁴	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			
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 ⁹⁵	Yes	Yes	2 kg	2 kg	2 kg
FI	No	No	No			
FR	Yes	Yes	Yes	2 kg	2 kg	2 kg

⁹² AT: There is no differentiation between express and non-express. Not included in USO if posted in distribution centers.

⁹³ SE: No definition of express, such items fall under the general letter definition if addressed.

⁹⁴ AT: Bulk mail is included in scope of USO, however, anything posted in distribution centers is excluded.

⁹⁵ ES: Only correspondence, not direct mail.

MK	Yes	Yes	Yes			
HR	No	No	No			
HU	Yes	Yes	Yes	2 kg	2 kg	2 kg
IE ⁹⁶	Yes	Yes	Yes	2 kg	2 kg	2 kg
IT	Yes	No	No	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	Yes	Yes	Yes	2 kg	2 kg	2 kg
PL	No	No	No			
PT	Yes	Yes	Yes	2 kg	2 kg	2 kg
RO	No	No	No			
RS	No	No	No			
SE ⁹⁷	Yes	Yes	Yes	2 kg	2 kg	2 kg
SI	No	No	No			
SK	Yes	Yes	Yes	2 kg	2 kg	2 kg

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	<p>Definition is provided in article 15 of the postal act: Art. 15. § 1. The universal postal service shall include the following facilities:</p> <p>1° the clearance, sorting, transport and delivery of postal items up to 2 kg;</p> <p>2° the clearance, sorting, transport and delivery of postal parcels offered at single-piece rates up to 10 kg;</p> <p>3° the delivery of postal parcels offered at single-piece rates coming from other Member States up to 20 kg;</p> <p>4° the services for registered items and insured items.</p> <p>The universal postal service shall include both domestic and cross-border services.</p> <p>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.</p> <p>§ 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.</p> <p>§ 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.</p>
BG	
CY	<p>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.</p> <p>The density of post offices and access points corresponds to the needs of users.</p> <p>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.</p> <p>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;</p> <p>(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):</p> <p>Provided that any exceptional circumstances or deviations recognized by the Commissioner shall be notified to the</p>

⁹⁶ IE: Certain bulk mail, including letters and packets.

⁹⁷ SE: Bulk mail falls under the general letter definition, just as any other letter.

	<p>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:</p> <p>Universal service shall include both national and cross-border services.</p> <p>Postal services to blind or partially-sighted persons shall be provided free of charge in accordance with the provisions of the Universal Postal Union.</p>
CZ	
DE	<p>There shall be designated as universal services the following postal services:</p> <ol style="list-style-type: none"> 1. the conveyance of letter items within the meaning of Section 4 subpara 2 of the Postal Act, provided their weight does not exceed 2,000 grams and their dimensions do not exceed those laid down in the Universal Postal Convention and its Detailed Regulations; 2. the conveyance of addressed parcels whose individual weight does not exceed 20 kilograms and whose dimensions do not exceed those laid down in the Universal Postal Convention and its Detailed Regulations; 3. the conveyance of newspapers and magazines within the meaning of Section 4 subpara 1 letter c) of the Postal Act. These include regular publications that serve to inform the public of daily news, topical issues or specialised matters, covered by the press in the normal manner. <p>(2) The conveyance of letters shall also include the item forms</p> <ol style="list-style-type: none"> 1. registered item (letter item that has flat-rate insurance against loss, theft or damage and is handed over in return for confirmation of receipt); 2. insured item (letter item whose contents are insured against loss, theft or damage up to the amount indicated by the sender), 3. cash-on-delivery item (letter item that is handed over to the addressee only when a specified sum has been paid in cash), 4. express delivery item (letter item that is delivered by special delivery staff as soon as possible after arrival at a delivery point).
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	<p>Article 21 of the Spanish Postal Act (Scope of the Universal Service):</p> <ol style="list-style-type: none"> 1. Included in the scope of the universal service are the activities of clearance and distribution of national and cross-border postal items on a regular basis of: <ol style="list-style-type: none"> a) Letters and postcards which contain written communications in any type of medium of up to two kilograms in weight. b) Postal parcels, with or without commercial value, of up to twenty kilograms in weight. <p>The universal service shall include equally the provision of registered and declared value services, in addition to the items provided for in this section.</p> 2. National and cross-border direct advertising, books, catalogues, periodical publications and others whose circulation is not prohibited shall be admitted for their dispatch into the universal service system whenever this occurs in accordance with any of the ways provided for in the preceding section.
FI	
FR	
MK	
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	
IT	<p>According to the Article 3, of the Law 22 July 1999, n. 261:</p> <ol style="list-style-type: none"> 1. The universal service ensures the services included in it, of a quality determined to be permanently provided in all points of the national territory at affordable prices to all users. 2. Universal service, including cross-border service, includes: <ol style="list-style-type: none"> a) the collection, transport, sorting and distribution of postal items up to 2 kg; b) the collection, transport, sorting and distribution of postal parcels up to 20 kg; c) services relating to registered mailings and insured mailings. 3. Universal service is characterized by the following connotations: <ol style="list-style-type: none"> a) quality is defined in the context of each service and is referred to in European legislation; b) the service is provided on an ongoing basis for the entire duration of the year; c) the term "all points of the "national territory " is specified according to criteria of reasonableness through the activation of an adequate number of access points; d) the determination of the "accessible price" must include cost orientation with reference to efficient company management.
LT	<p>According to the Article 14 of the Postal Law:</p> <p>"1. The provision of the following universal postal service on the territory of the Republic of Lithuania must be ensured:</p> <ol style="list-style-type: none"> 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. <p>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.</p>



	<p>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.</p> <p>4. A postal service with added value shall not be attributed to the universal postal service. A postal service with added value shall mean:</p> <ol style="list-style-type: none"> 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	<p>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.</p> <p>Universal postal service, in domestic and international postal traffic, shall include:</p> <ol style="list-style-type: none"> 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	

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	Yes
BE	Yes	Yes	Yes	Yes	Yes	Yes	Yes
BG	Yes	Yes	Yes	Yes	Yes	Not defined ⁹⁸	Yes
CY	Yes	Yes	Yes	Yes	Yes	Yes	
CZ	Yes	Yes	Yes	Yes	Yes ⁹⁹	Not defined ¹⁰⁰	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	Yes
FI	Yes	Yes	Yes	Yes		Yes	
FR	Yes	Yes	Yes ¹⁰¹	Yes ¹⁰²	No	Yes ¹⁰³	
MK	Yes	Yes	Yes	Yes	Yes	No	
HR	Yes	Yes	Yes	Yes	Yes	No	
HU	Yes	Yes	Yes	Yes	Yes ¹⁰⁴	Yes ¹⁰⁵	
IE	Yes	Yes	Yes	Yes	No	Yes	
IT	Yes	Yes	Yes	Yes	Yes	Yes	Yes
LT	Yes	Yes	Yes	Yes	Yes ¹⁰⁶	Yes	
LU	Yes	Yes	Yes	Yes	Yes	Yes	Not defined
LV	Yes	Yes	Yes	Yes	Yes	Yes	
MT	Yes	Yes	Yes	Yes	Yes	Yes	Yes
NL	Yes	Yes ¹⁰⁷	Not defined	Yes ¹⁰⁸	No ¹⁰⁹	Yes ¹¹⁰	Yes
NO	Yes	Yes	Yes	Yes	No	Yes	Yes

⁹⁸ BG: There is no definition in the Postal Services Act.

⁹⁹ CZ: If these items are postal, not courier (direct transport without sorting).

¹⁰⁰ CZ: Bulk mail is not a separate service in CZ.

¹⁰¹ FR: Only regarding postal providers which have an individual licence granted by the NRA.

¹⁰² FR: Only regarding postal providers which have an individual licence granted by the NRA.

¹⁰³ FR: Only regarding postal providers which have an individual licence granted by the NRA.

¹⁰⁴ HU: This service is counted as non-US.

¹⁰⁵ HU: Bulk mail is counted to US.

¹⁰⁶ LT: There is no distinction between express and non-express service providers.

¹⁰⁷ 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.

¹⁰⁸ 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.

¹⁰⁹ NL: Express mail is excluded from the definition of postal services.

¹¹⁰ 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.

PL	Yes	Yes	No	Yes	Yes	No	
PT	Yes	Yes	Yes ¹¹¹	Yes ¹¹²	Yes	Yes	
RO	Yes	Yes	Yes	Yes	Yes	Yes	Yes
RS	Yes	Yes	No ¹¹³	Yes	Yes	No ¹¹⁴	
SE	Yes	Yes	Yes	Yes	No	Yes	Yes
SI	Yes	Yes	No	Yes	Yes	No	
SK	Yes	Yes	Yes ¹¹⁵	Yes	Yes	Yes	
TOTAL REPLIES	32	32	32	32	31	32	12
Yes	32	31	28	31	24	23	8
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 ¹¹⁶	Yes	Yes	Not defined ¹¹⁷
CY	Yes	Yes	Yes	Yes	Yes	Yes
CZ	Yes	Yes	Yes	Yes	Yes ¹¹⁸	Not defined ¹¹⁹
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 ¹²⁰	Yes ¹²¹	No	Yes ¹²²
MK	Yes	Yes	Yes	Yes	Yes	No
HR	Yes	Yes	Yes	Yes	Yes	No
HU	Yes	Yes	Yes	Yes	Yes ¹²³	Yes ¹²⁴
IE	Yes ¹²⁵	Yes ¹²⁶	No	No	No	Yes ¹²⁷
IT	Yes	Yes	Yes	Yes	Yes	Yes
LT	Yes	Yes	Yes	Yes	Yes ¹²⁸	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

¹¹¹ PT: The NRA has the power to collect data only from authorised or licensed providers.

¹¹² PT: The NRA has the power to collect data only from authorised or licensed providers.

¹¹³ RS: There isn't any OPSP on US in the Republic of Serbia yet.

¹¹⁴ RS: There is no definition on bulk mail in postal legislation.

¹¹⁵ SK: There are no other operators providing US; they provide only interchangeable services.

¹¹⁶ BG: There are no other OPSP on the US scope.

¹¹⁷ BG: There is no definition in the Postal services Act.

¹¹⁸ CZ: If these items are postal, not courier (direct transport without sorting).

¹¹⁹ CZ: Bulk mail is not a separate service in CZ.

¹²⁰ FR: Only regarding postal providers which have an individual licence granted by the NRA.

¹²¹ FR: Only regarding postal providers which have an individual licence granted by the NRA.

¹²² FR: Only regarding postal providers which have an individual licence granted by the NRA.

¹²³ HU: This service is counted as non-US.

¹²⁴ HU: Bulk mail is counted to US.

¹²⁵ IE: From the Annual Regulatory Accounts of the USP.

¹²⁶ IE: From the Annual Regulatory Accounts of the USP.

¹²⁷ IE: USP Only and Bulk services within scope of Universal Service only. Taken from the Annual Regulatory Accounts of the USP.

¹²⁸ LT: Express service providers are not distinguished from other postal service providers and fall within the same category as non-US providers.



PL	Yes	Yes	No	Yes	Yes	No ¹²⁹
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 ¹³⁰	Yes	Yes	No
SK	Yes	Yes	Yes	Yes	Yes	Yes
TOTAL REPLIES	32	32	30	31	31	31
Yes	32	31	23	28	24	21
No	0	30	6	3	7	7
Not defined	0	0	1	0	0	3

¹²⁹ PL: Bulk mail is included in the total number of items but not indicated separately.

¹³⁰ SI: Yes on scope but not specifically on US.

7. ANNEX 3 – Country codes

Figure A. 20. Country codes used in the report

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