

Postal Services in Europe

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INDUSTRY, TRADE AND SERVICES

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POPULATION AND SOCIAL CONDITIONS

SCIENCE AND TECHNOLOGY

Data on the Universal Service Providers (USPs)

Table 1: Selected indicators of the European postal market in 2004

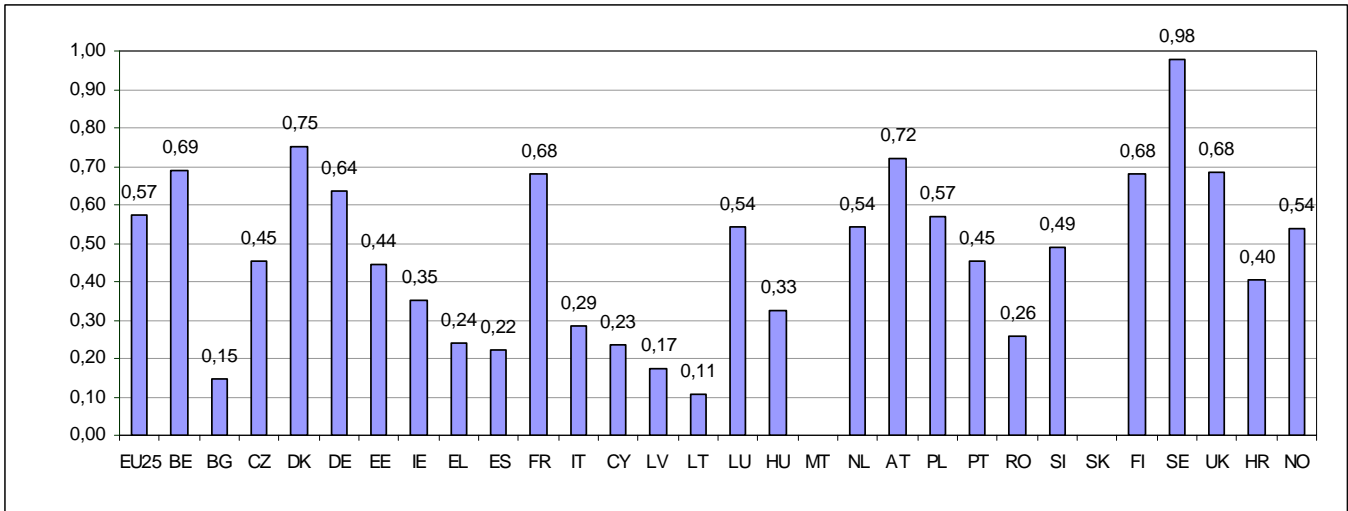
	Post offices (number)	Domestic Employment (total number)	Domestic Turnover (Mio. EUR)	Letter-post services (1000)	Ordinary letters and postcards (1000)	List Price standard letter (EUR)	Reserved area (1000)	On-time delivery (D+1)* (%)
BE	1 308	32 311	2 000.5	na	na	0.50	c	87.3
BG	3 134	9 134	28.9	80 798	51 742	0.23	67 552	88.0
CZ	3 419	31 681	396.4	952 990	649 358	0.20	580 939	95.0
DK	996	28 349	1 482.0	1 454 053	1 185 700	0.60	1 001 600	95.2
DE	34 019	201 541	14076.0	16 038 000	8 900 000	0.55	13 705 000	87.9
EE	545	4 222	41.6	74 338	57 802	0.28	na	95.3
IE	1 614	7 502	515.0	757 000	607 500	0.48	594 000	72.0
EL	1 565	10 412	401.8	600 988	457 496	0.49	494 556	65.8
ES	10 063	52 133	1 854.7	4 964 692	3 802 210	0.27	3 082 447	84.3
FR	16 947	na	11300.0	19 329 000	11 514 000	0.53	15 007 000	75.7
IT	13 855	c	3973.0	6 056 543	3 384 242	0.60	c	87.2
CY	52	942	29.7	55 462	54 636	0.34	na	62.5
LV	967	7 080	19.5	64 006	59 972	0.23	59 195	70.0
LT	951	8 164	19.4	52 854	na	0.29	20 056	78.6
LU	543	1 485	146.0	133 300	91 390	0.50	80 000	97.4
HU	2 820	27 713	268.6	918 303	692 184	0.36	814 695	99.3
MT	53	625	c	c	c	0.16	c	89.0
NL	2 112	42 150	2660.0	5 300 000	2 970 000	0.39	na	96.5
AT	1 947	26 058	1 701.6	na	na	0.55	na	95.9
PL	8 350	73 784	1161.0	3 165 683	1 563 162	0.42	1 930 460	93.0
PT	3 037	14 378	648.0	1 300 654	c	0.45	1 055 694	95.6
RO	6 955	34 756	na	324 741	189 973	0.12	156 321	na
SI	557	5 645	128.0	398 129	311 413	0.20	295 063	99.0
SK	1 603	13 990	c	514 805	277 118	0.37	258 982	94.6
FI	1 311	21 800	1035.0	2 150 400	893 820	0.65	na	95.7
SE	2 000	34 299	2753.0	2 995 500	2 062 900	0.60	na	95.6
UK	17 900	195 952	11847.0	18 807 000	na	0.44	na	91.0
HR	1 158	9 838	114.3	299 701	195 523	0.31	176 707	98.1
NO	1 504	19 650	1104.0	1 427 000	na	0.72	1 073 608	99.6

Source: Eurostat, Inquiry on Postal Services 2005.

Notes: * The indicator refers to % of priority letters delivered on-time according to national performance indicators (DOM 501). The standard measured is D+1, except for ES and NO, where it is D+3. For more detailed information on the indicators, see "Methodological Notes" at the end of the document. Figures in *italic* are estimated.

Turnover

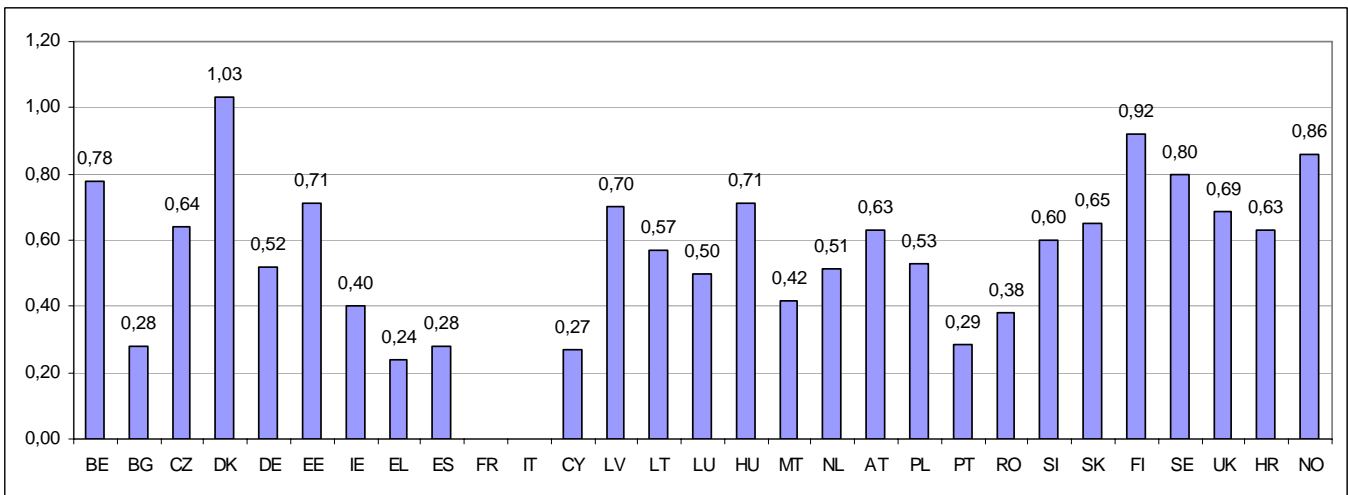
Chart 1: Total turnover from the domestic postal sector as % of the GDP (2004)



Source: Turnover: Eurostat, Inquiry on Postal Services 2005, GDP: Eurostat databank.
Notes: The turnover refers to the total turnover from the provision of postal and related services domestically (FIN 303). Turnover data of MT and SK are confidential. Those are integrated into the calculation of the EU-25 aggregate. For more detailed information, see "Methodological notes" at the end of the document.

Employment

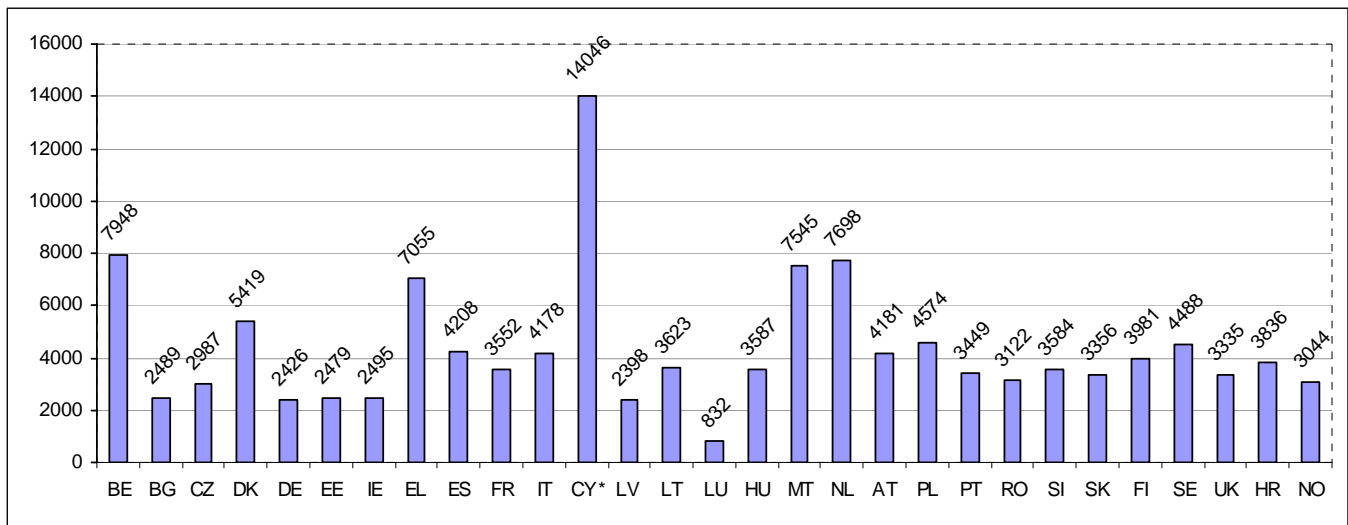
Chart 2: Total number of persons employed in the domestic postal sector as % of the total employment (2004)



Source: Employment in the postal sector: Eurostat, Inquiry on Postal Services 2005. Total employment: Eurostat, Annual employment averages, domestic concept – ESA.
Notes: Employment in the postal sector refers to the total number of persons employed for the provision of postal and related services domestically (EMPL 106). Data on domestic employment in the postal sector of FR and IT are not available. For more detailed information, see "Methodological notes" at the end of the document.

Post offices

Chart 3: Number of people served by one post office (2004)



Source: Eurostat, Inquiry on Postal Services 2005.

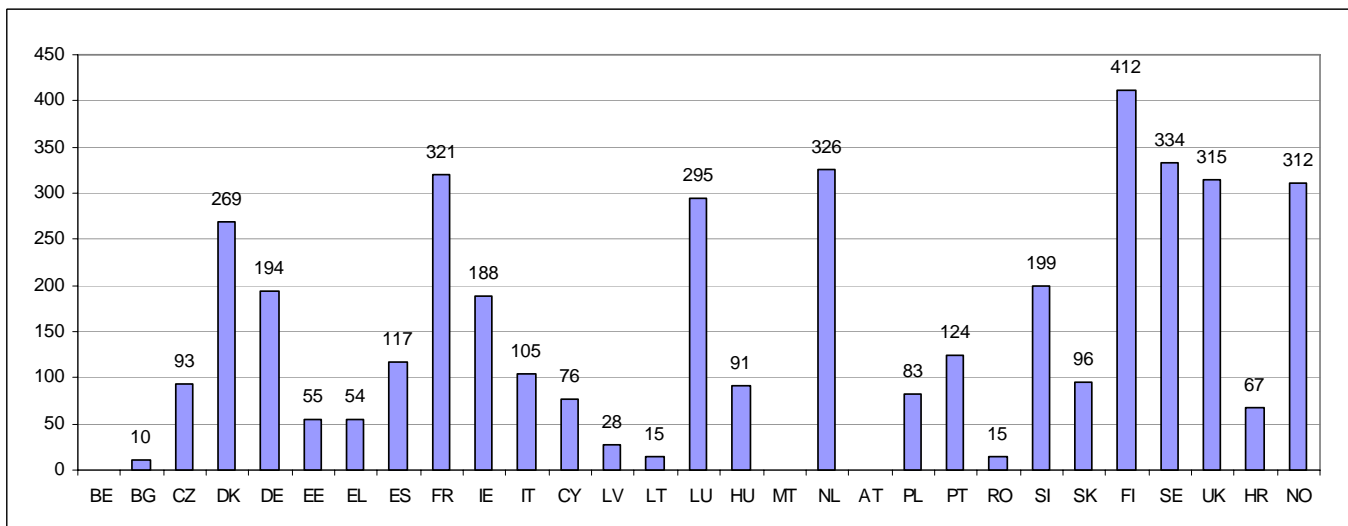
Notes: The indicator refers to all offices open to the public and all postal agencies (ACC 202). Population data (average population by country on 1st of January of 2004), Eurostat.

In Cyprus the number of people served by one post office seems very high, because of the so-called agents, which, for definition reasons, are not included. These agents own small businesses in villages and - next to the provision of basic postal services - deliver and collect mail in the respective village. By including the 1059 agents, the number of people served by one post-office would go down to 657.

For more detailed information, see "Methodological notes" at the end of the document

Letter Post items

Chart 4: Number of letter post items sent per capita (2004)



Source: Eurostat, Inquiry on Postal Services 2005.

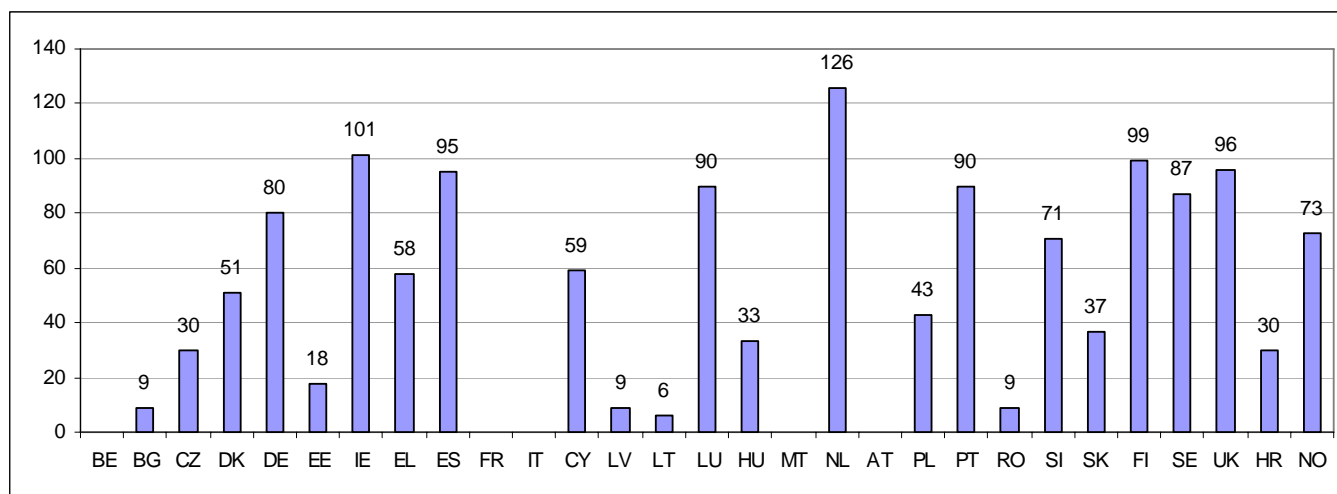
Notes: The indicator refers to the total letter-post services (ITM 402). Letters post services include ordinary letters and postcards, direct mail, registered mail, insured mail and other letter-post items.

Population data (average population by country on 1st of January of 2004), Eurostat.

Data on letter-post items of BE, MT and AT are not available.

For more detailed information, see "Methodological notes" at the end of the document

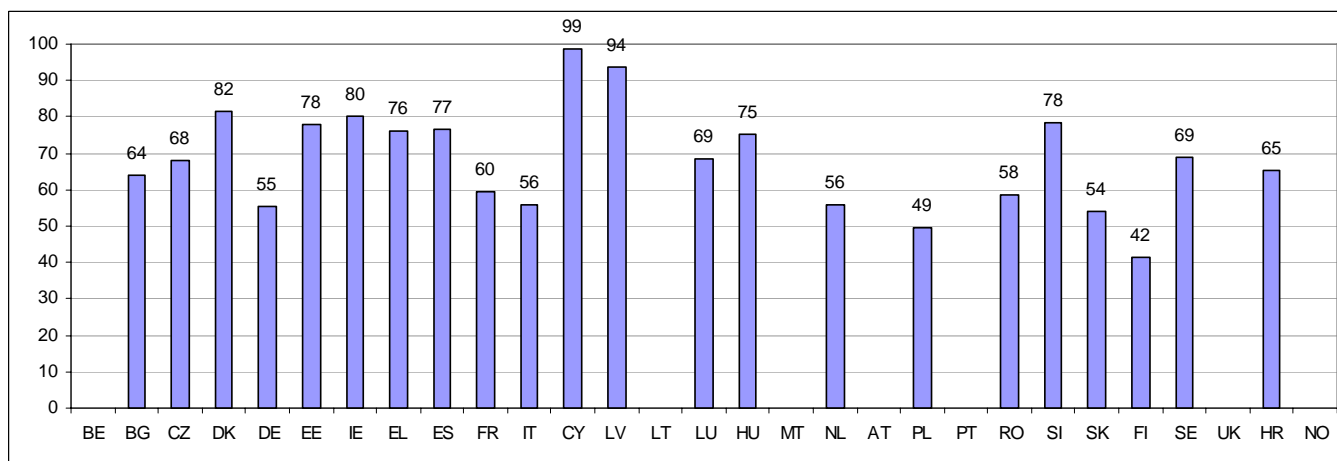
Chart 5: Number of letter post items distributed per employee (2004)



Source: Eurostat, Inquiry on Postal Services 2005.
Notes: The indicator refers to the total letter-post services (ITM 402) in relation to the domestic employment (EMPL 106). Data of BE, FR, IT, MT and AT are not available. For more detailed information, see "Methodological notes" at the end of the document

Letter volumes

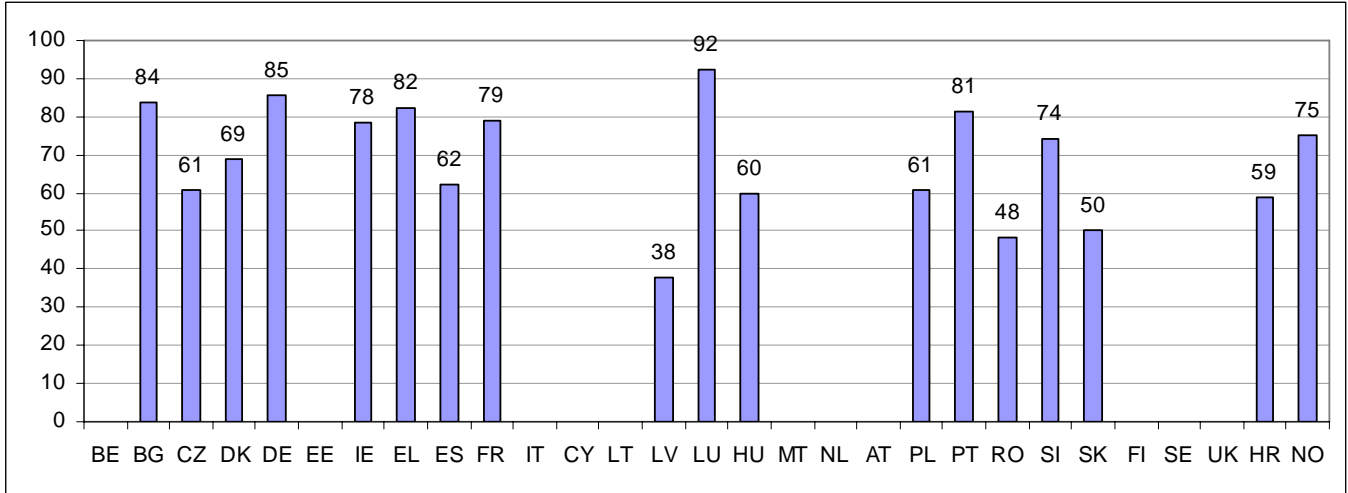
Chart 6: Ordinary letters and post cards as % of the total letter-post services (2004)



Source: Eurostat, Inquiry on Postal Services 2005.
Notes: Ordinary letters and postcards (ITM 409) are shown in relation to the total letter-post services (ITM 402). Figures for BE, LT, MT, AT, PT, UK and NO are not available. For more detailed information, see "Methodological notes" at the end of the document

Reserved area

Chart 7: Reserved area as % of the total letter post services (2004)

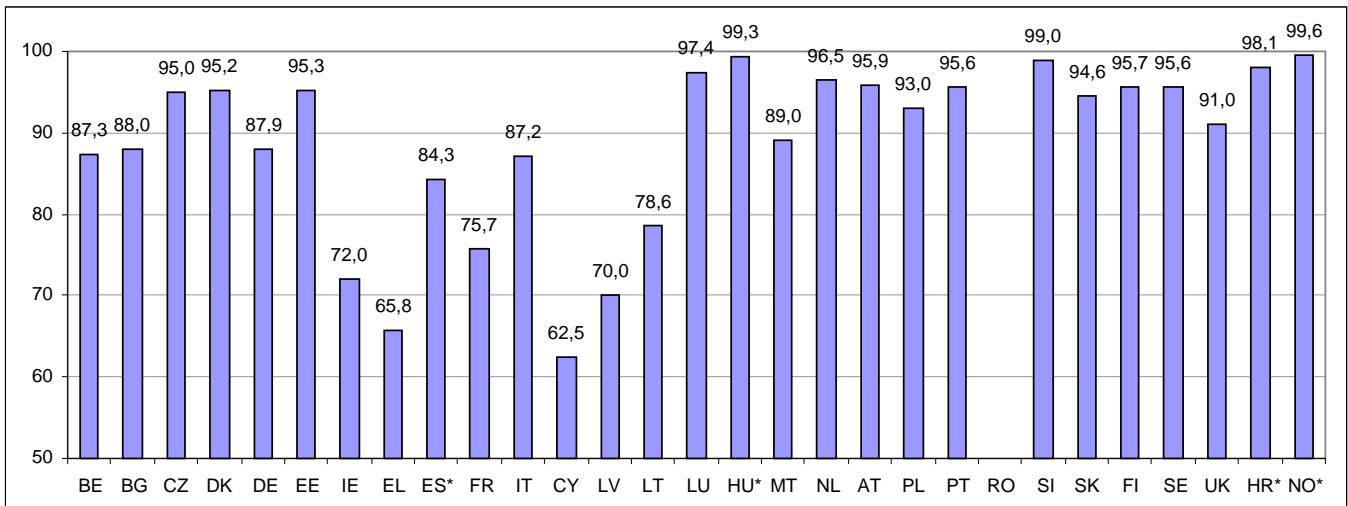


Source: Eurostat, Inquiry on Postal Services 2005.

Notes: The indicator refers to the reserved area of the total letter-post services (ITM 403). No data available for BE, EE, CY, LT, NL, AT, FI, SE and UK. Data of IT and MT are confidential. For more detailed information, see "Methodological notes" at the end of the document

Quality standards

Chart 8: % of priority letters delivered on-time according to national performance indicators (2004)

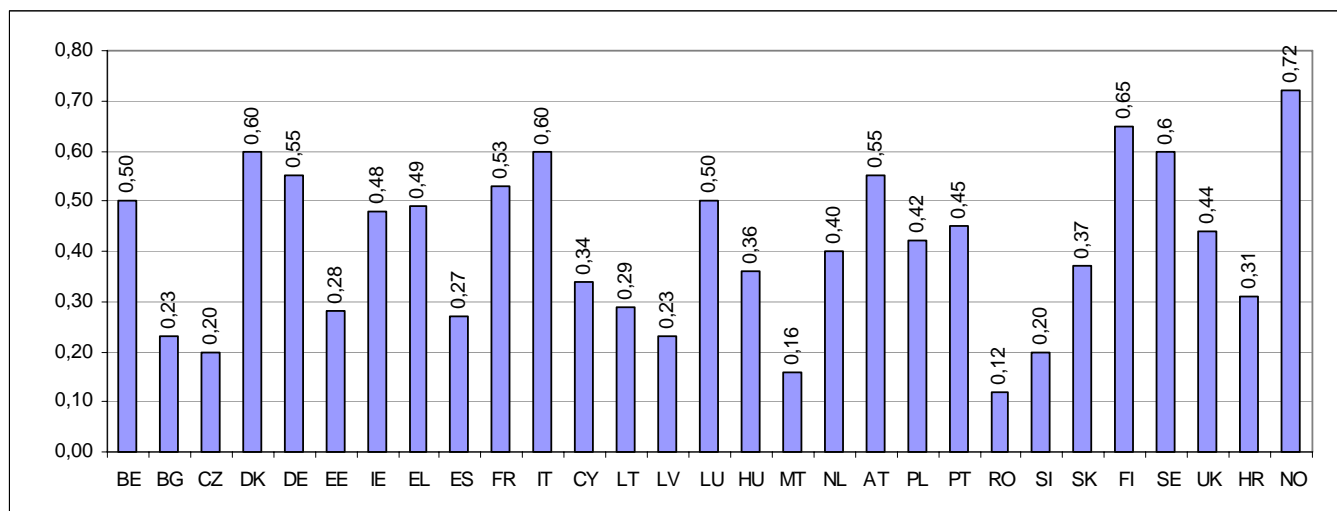


Source: Eurostat, Inquiry on Postal Services 2005.

Notes: The indicator refers to % of priority letters delivered on-time according to national performance indicators (DOM 501). The standard measured is D+1, except for ES, HR and NO, where it is D+3 and HU, where it is D+15. No data available for RO. For more detailed information, see "Methodological notes" at the end of the document

Price for a standard letter

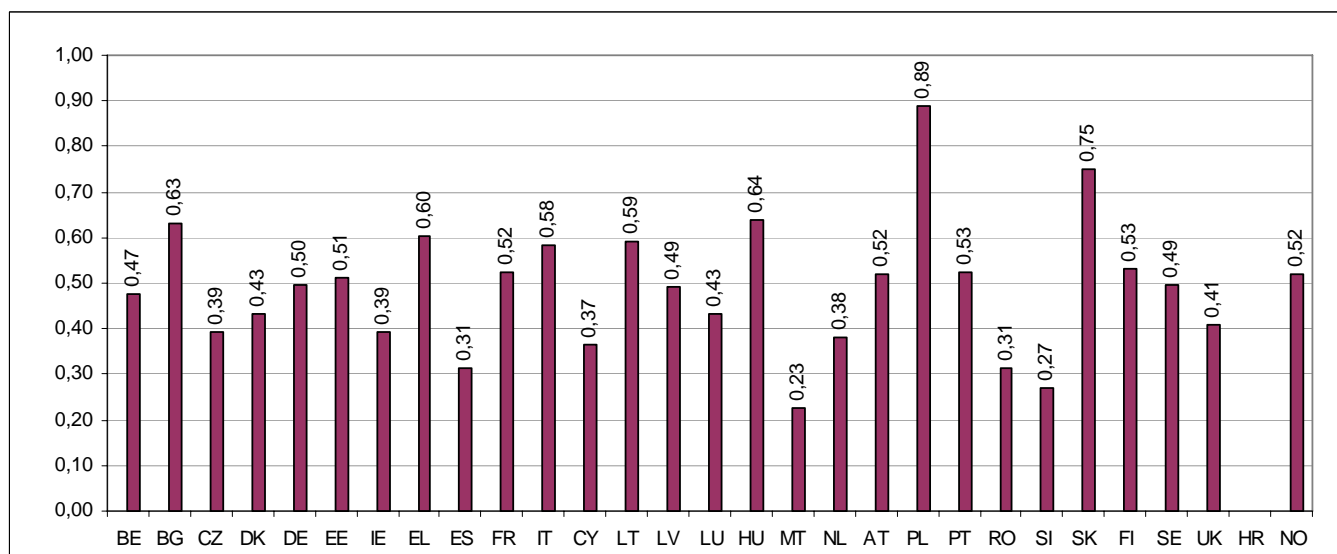
Chart 9: List price (EUR) for a standard (1st class) letter weighting less than 20 g (universal service) for domestic services (2004)



Source: Eurostat, Inquiry on Postal Services 2005.

Notes: The indicator refers to the domestic list price payable for the handling of a standard (1st class) letter weighting less than 20 g (universal service) (PRI 601). Exchange rates used for the currency conversions of the countries (BG, DK, CZ, EE, CY, LT, LV, HU; MT, PL, RO, SI, SK, SE, UK, HR, NO) not using the EURO as national currency, are the annual averages of 2004, Eurostat databank. For more detailed information, see "Methodological notes" at the end of the document

Chart 10: Prices (EUR) related to Purchasing Power Parities for a standard (1st class) letter weighting less than 20 g (universal service) for domestic services (2004)



Source: Eurostat, Inquiry on Postal Services 2005 and also Eurostat databank for Purchasing Power Parities

Notes: No data available for the purchasing power parity of HR. For more detailed information, see "Methodological notes" at the end of the document

COMMENTS

After a break of three years, Eurostat has started collecting data on postal services. The National Regulatory Authorities are Eurostat's partners in the data collection and the reference year is 2004. This *Data in Focus* (DIF) is the first publication based on some selected variables of the new data set.

The data collection covered the companies operating under the Universal Service obligation (Universal Service Providers, USP) as well as other service providers. "Universal service" refers here to the set of general interest demands to which services such as the mail should be subject throughout the Community. The aim is to ensure that all users have access to quality services at an affordable price.

For the current publication, only data on the USP have been used. Activities other than postal services (for instance financial services) of the USP are excluded. The USPs are here defined as public or private entities providing a universal service or parts thereof within a Member State whether required by license, authorisations or other legal instruments.

The postal services are undergoing a market liberalisation, which is progressing at different phases in different Member States. This should be taken into consideration while making comparisons between countries, as in the process some of the services are privatised in some of the countries and in some not.

METHODOLOGICAL NOTES

Country codes:

BE: Belgium	IE: Eire/Ireland	LT: Lithuania	AT: Austria	FI: Finland
BG: Bulgaria	EL: Greece	LV: Latvia	PL: Poland	SE: Sweden
CZ: Czech Republic	ES: Spain	LU: Luxembourg	PT: Portugal	UK: United Kingdom
DK: Denmark	FR: France	HU: Hungary	RO: Romania	HR: Croatia
DE: Germany	IT: Italy	MT: Malta	SI: Slovenia	NO: Norway
EE: Estonia	CY: Cyprus	NL: Netherlands	SK: Slovakia	

Data source:

All variables used were collected in the context of the Eurostat Inquiry on Postal Services 2005, on the basis of annual questionnaires sent to the National Regulatory Authorities in the participating countries.

Definitions of the variables used:

Turnover - Total turnover from the provision of postal and related services domestically (FIN 303):

Domestic turnover refers to turnover from postal activities within the economic territory of the country of reference.

Receipts from foreign operators for services within the reference country should be included.

Turnover is defined here as comprising the totals invoiced by the observation unit during the reference period, and this corresponds to market sales of services supplied to third parties.

Turnover includes all duties and taxes on the services invoiced by the unit with the exception of the VAT invoiced by the unit vis-à-vis its customer and other similar deductible taxes directly linked to turnover. It also includes all other charges (transport, packaging, etc.) passed on to the customer, even if these charges are listed separately in the invoice. Reduction in prices, rebates and discounts as well as the value of returned packing are deducted.

Income classified as other operating income, financial income and extra-ordinary income in company accounts is excluded from turnover. Operating subsidies received from public authorities or the institutions of the European Union are also excluded.

Employment – Total number of persons employed for the provision of postal and related services domestically (EMPL 106)

Domestic employment refers to persons employed in postal services within the economic territory of the country of reference. It also includes part-time workers, who are regarded as such under the laws of the country concerned and who are on the pay-roll, as well as seasonal workers, apprentices and home workers on the pay-roll. It is measured as an average over the reference year. Presenting the number of persons employed as a share of total employment of the National Accounts is not ideal, as the latter is in Full-Time Equivalents, but is nevertheless presented as an acceptable proxy.

Post offices – Offices open to the public and Postal agencies (ACC 202)

Offices open to the public refer to offices operated by the USP, to which customers may apply for all postal services. They include full-service permanent post offices, secondary permanent post offices that generally have reduced services and/or limited opening times for the public and mobile post offices installed in a train, a road

transport vehicle or a boat which serve regions without permanent post offices, as well as delivery personnel providing post office counter services on their rounds.

Letter post services (ITM 402)

Letter-post services consist of items of correspondence (ordinary letters and postcards, direct mail, registered mail, insured mail) and other letter-post items (books, catalogues, newspapers and periodicals). These items are to be conveyed and delivered at the address indicated by the sender on the item itself or on its wrapping.

Reserved area (ITM 403)

Reserved area refers to the standard letter-post service, where USPs enjoy exclusive rights to provide services. The reserved area is delineated at country level within weight/price limits given by the EC postal directives (97/67/EC and 2002/39/EC). Country definitions for the reserved area vary, so direct comparisons between countries should be made with prudence. In this publication it is expressed in terms of numbers of letters and in percentage of the total letter post services.

On-time delivery of priority letters according to national performance indicators (DOM 501)

"Quality standards" for national mail in each Member State have been established by Member States in relation to the time limit for routing measured from end to end for postal items of the fastest standard category according to the formula $D + n$, where D represents the date of deposit and n the number of working days, which elapse between the date and that of delivery to the addressee.

The traditional indicator of the quality of postal service is the percentage of letters delivered on time according to the national performance standards, stipulated by the NRAs. The basic quality indicator adopted here is $D+1$ (delivery of letter 1 working day after posting it).

Prices – List price (EUR) payable for the handling of a standard (first class) letter weighting less than 20 g (universal service) for domestic service (PRI 601)

Prices of letters vary significantly between EU Member States according to various criteria. For reasons of comparability, the price of a 1st class letter weighing 20 gr. is being requested for domestic service. Prices should be indicated for 1 July of the reference year, i.e. 2004.

The prices are compared in two ways, in direct Euro terms and taking into account the purchasing power of each country. The Purchasing Power Parities of consumption have been used to adjust the direct prices to the purchasing power in the country. The adjustment changes the price comparison significantly.

FURTHER INFORMATION

European Statistical Data Support

Contact details for this support network can be found on the Eurostat Internet site:
<http://ec.europa.eu/eurostat> → Services: Help/Data support