

Changes in postal sector Problems we challenge

Content

- Changes and development of postal service
- Problems with separation of carriage and postal service provision



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Changes in the market

Digitalization Growth of e-commerce New players

- Increasing choise and affordability of products in e-commerce
- The parcel delivery segment with new players entering in the market (ecommerce platforms, logistic companies and others)
- Traditional postal operators no longer are dominant players in the market
- In the business-to-consumer (B2C) parcel delivery segment, innovation and competition are leading the market
- the users' needs with more flexible delivery options

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Changes in the market

- The users ability to choose delivery alternatives (home, postal office, parcel locker and others)
- the offering of easy returns solutions
- the end-to-end tracking

Traditional postal operators are investing to meet the new delivery needs though legal requirements do not change so fast



• Problems we challenge:

- Postal service definition
- Postal service providers activity
- Platforms role
- Postal service providers and carriers substitutability

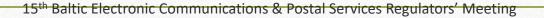


Postal service definition:

- Postal service shall mean:
 - the clearance,
 - sorting,
 - transport <u>and</u>
 - delivery of postal items

- *Directive* 97/67:
- postal service provider: undertaking that provides <u>one or more</u> postal services

One or more elements/steps or postal services that consist of those 4 elements?



- Postal service providers activity
- Postal service provider is not forbidded to develop bussiness in other fields than postal service provision:
 - Carriage
 - Publishing
 - Production of envelope

Postal service providers and carriers substitutability?



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Platforms role

- People can now easily decide which way of delivery to choose in platforms were they can compaire terms and conditions of shipping
- What status is platform itself?
 - It has agreements with postal service providers
 - It is like an organiser of delivery
 - It takes responsibility to the client



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Postal service – small logistics Differences?

Criteria	Postal service	In between	Carriage
Announcement to RRT	Yes	Yes/No	No
Agreement on	Postal service	Delivery/shipping	Carriage
Items for delivery	Postal items/parcels	ltem	cargo
Service provider	Postal	Service provider	Carrier
Responsibility	Postal regulation	Contractual	CMR, Monreal Convention
Documentation	Contract/ Proof of delivery	Proof of delivery in invoice	Invoice

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Progress is impossible without change, and those who cannot change their minds cannot change anything.

"

George Bernard Shaw



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