



Changes in postal sector Problems we challenge

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Content

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



Changes in the market

Digitalization → Growth of e-commerce → New players

- Increasing choice and affordability of products in e-commerce
- The parcel delivery segment with new players entering in the market (e-commerce 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



Changes in the market

- The users ability to choose delivery alternatives (home, postal office, parcel locker and others)
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- 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 and*
 - *delivery of postal items*

- ***Directive 97/67:***
 - *postal service provider:
undertaking that provides
one or more 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 forbidden to develop bussiness in other fields than postal service provision:

- Carriage
- Publishing
- Production of envelope

Postal service providers and carriers substitutability?



- **Platforms role**

- People can now easily decide which way of delivery to choose in platforms were they can compare 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



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	Item	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

“

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

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George Bernard Shaw

