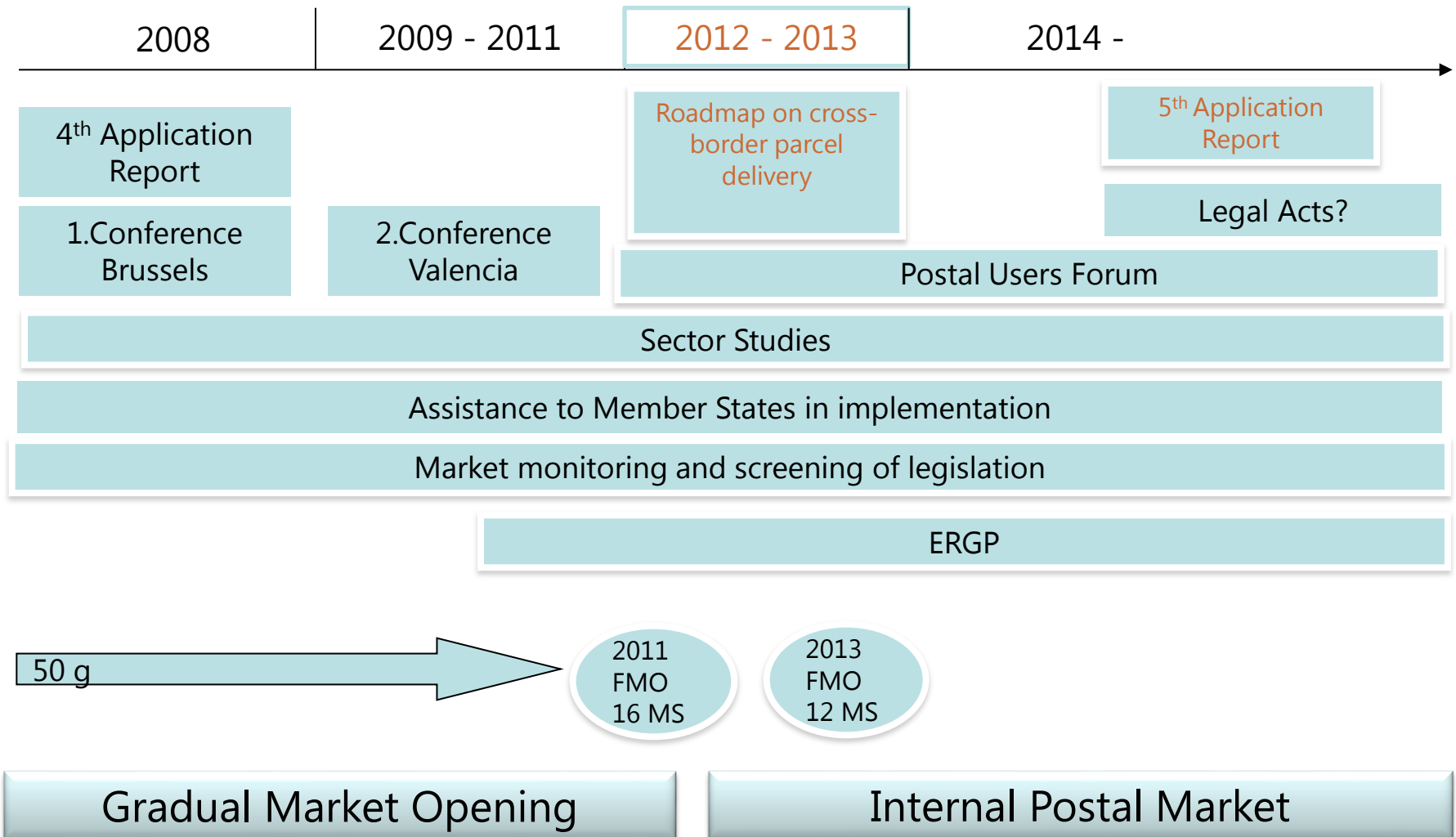


EU regulatory developments

CERP Plenary meeting

Skopje, 29 – 30 May 2014



5th Application Report

The Commission shall submit a report to the European Parliament and the Council on the application of this Directive, including appropriate information on developments in the sector, particularly concerning economic, social, employment patterns and technological aspects, as well as on quality of service. The report shall be accompanied, where appropriate, by proposals to the European Parliament and the Council.

Deadline of the 3rd Postal Directive: 31st December 2013

Postponed to be presented by the incoming Commission

Legislative implementation of Directive
2008/6/EC completed

Conformity check completed

Remaining
concerns/challenges
ahead

Remaining concerns

Excessive licensing requirements

Lack of adequate and sound market data

Lack of good quality regulatory data (e.g. cost data to ensure cost orientation and prevent anti-competitive practices)

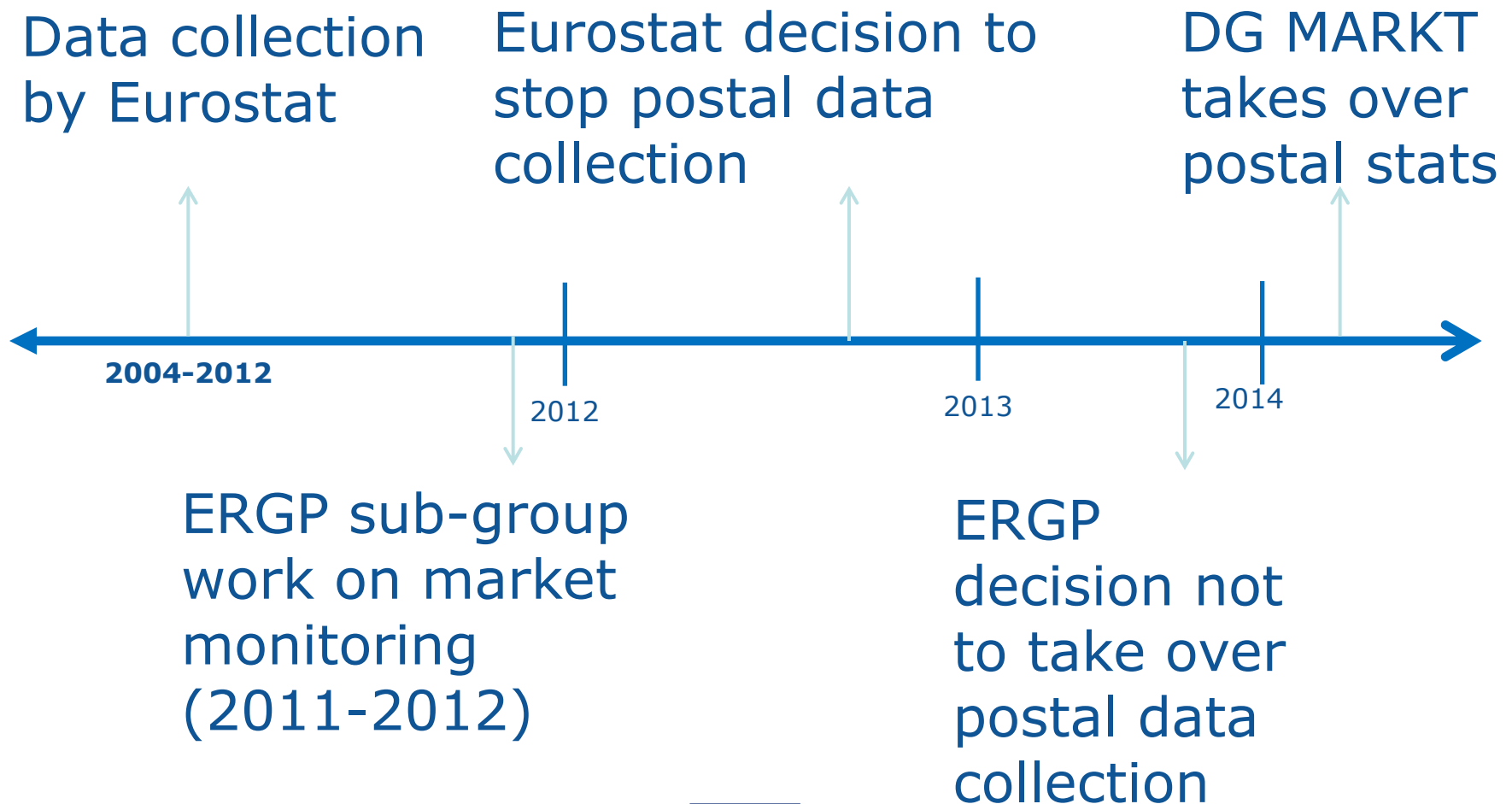
Challenges ahead

Impact of e-substitution on the sustainability of the universal postal services

Ensuring level playing field in related areas (e.g. customs; security; taxation)

Provision of sufficient resources and powers to the competent authorities

Postal statistics - overview



Scope of data collection

	USP	Non USP
USO Area	✓	✓
Beyond USO Area	✓	✓

All postal services market

Based on EUROSTAT Questionnaire and Glossary

Main Issues

-Different legal basis and powers to collect Data by the NRAs



-Limited in data that can be collected(USO only versus all market)

-Different definitions of scope of USO



-Only part of the market and Limited in cross comparison

-No authorization regime in place



-Limited in knowledge of the market (all players)

-Confidentiality



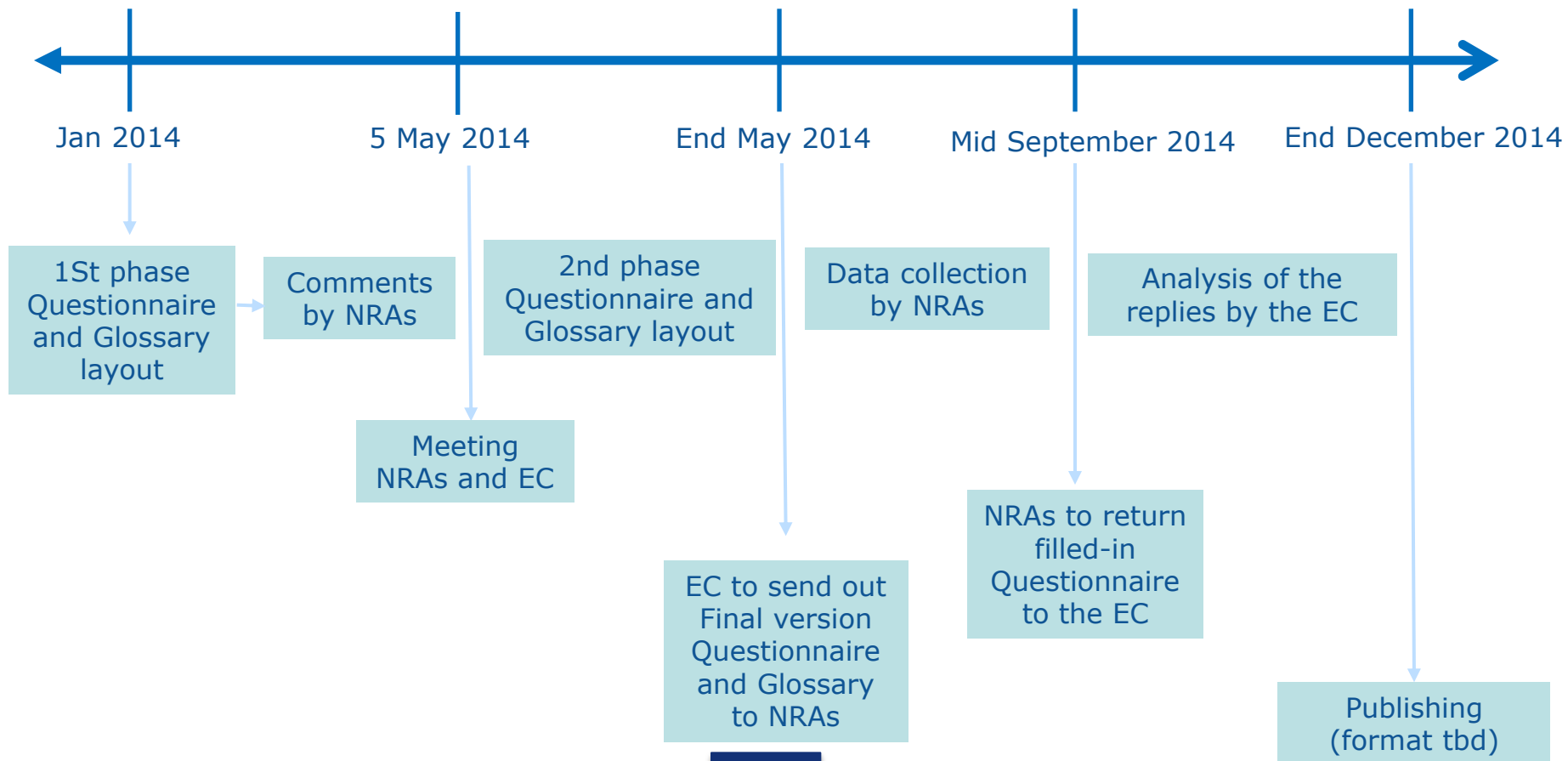
-Limited in data that can be used for publishing purposes

-Different approaches to Data collection by NRAs



-Some NRAs choose to proactively survey according to legal basis, some don't; different methodologies etc.

Timeline and process



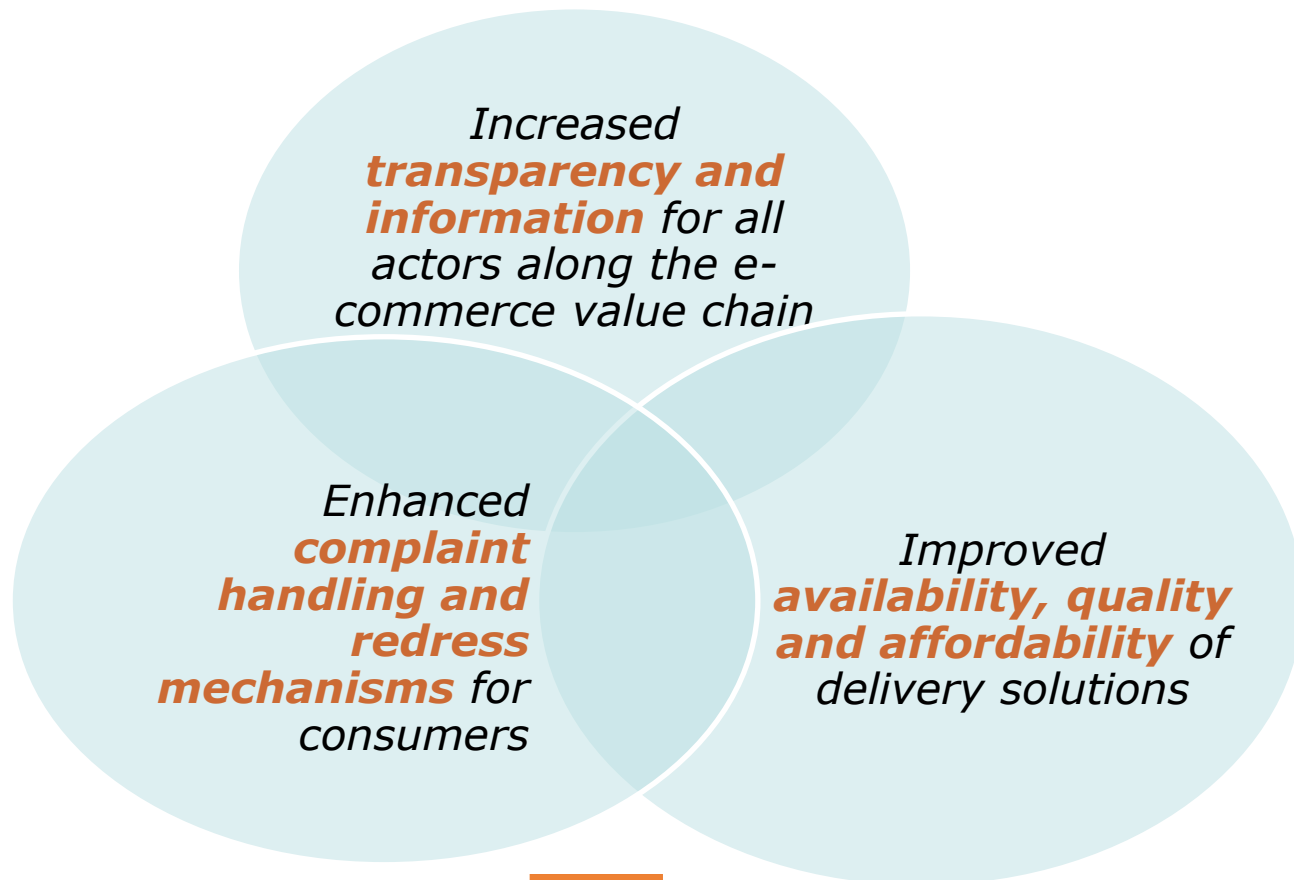
Cross-border parcel delivery and emerging e-commerce

Origin: **E-commerce Communication of 11 January 2012**

Public consultation: **Green Paper on Cross-border parcel delivery** confirms that

- Parcel Delivery is a key issue for positive development of e-commerce ;
- High potential currently not used; e-retailers and consumers see room for improvement concerning products ordered online;
- Dissatisfaction with (cross-border) delivery systems.

Green Paper on parcel delivery – main issues



Green Paper on parcel delivery - Actions

responses to
the Green Paper
consultation
(>100) confirm
problem(s) and
issues

needs of
consumers and
e-retailers are
not always met
in terms of
speed, quality,
reliability or
cost of delivery

general
provisions on
consumer
protection or
the collection of
statistical data
also apply also
outside the
scope of the
universal
service

delivery is a key
factor in the
overall
development of
e-commerce

(only) 5-10% of
cross-border
parcel delivery
flows fall under
the universal
service
provisions
(mainly C2C)

Roadmap on cross-border parcel delivery

Adopted on 16th December 2013

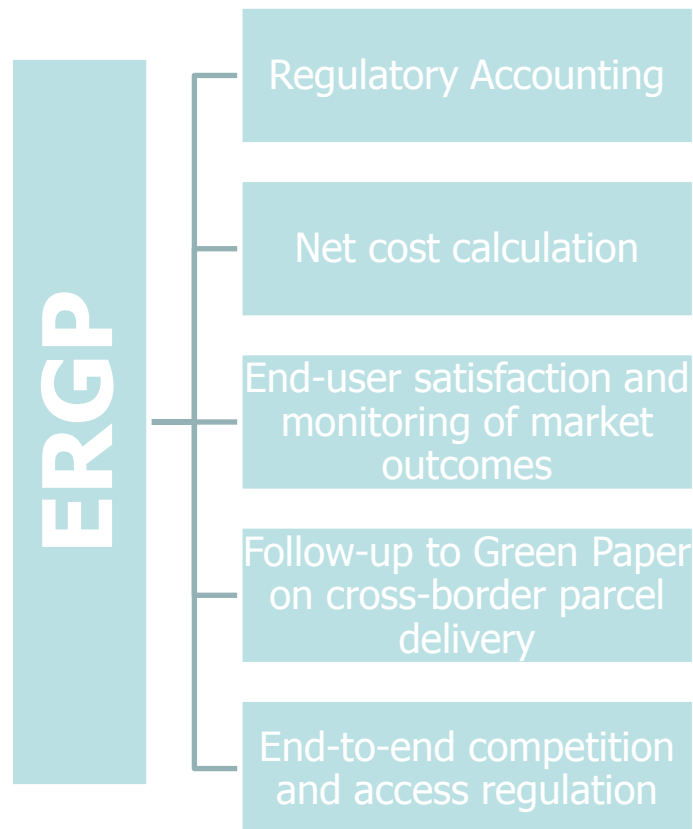
Objectives:

- **Increase transparency and information**
- **Improve the availability, quality and affordability of delivery solutions**
- **Enhance complaint handling and redress mechanisms for consumers**

Action Plan of 18 months – stocktaking mid-2015

ERGP – on-going activities

Current organizational structure



Recent outputs

ERGP Common Position on cost allocation rules

ERGP Report on net costs of USO – VAT exemption as a benefit or a burden

ERGP Reports on indicators for postal market

ERGP Reports on the quality of service and end-user satisfaction and assessment of complaint handling procedures and consumer protection

ERGP opinion on cross-border parcel delivery

Envisaged outputs for 2014 (1)

ERGP Report on tariff regulation in the context of the declining mail volumes

ERGP Report on benchmarking of the universal service tariffs

ERGP Report on experiences of the challenges when implementing a methodology for the net cost calculation based on a reference scenario

ERGP Discussion Paper on the implementation of the Universal Service in the postal sector and the effects of recent changes in some countries on the scope of the USO

Envisaged outputs for 2014 (2)

ERGP Report on best practices in the field of quality of service, complaint handling and consumer protection

ERGP Report of the quality of service, complaint handling and consumer protection indicators 2013 report – an analysis of trends

ERGP Report on the implementation of the 2012 ERGP report on indicators for monitoring the postal market

ERGP Opinion to the European Commission on European cross-border e-commerce parcels delivery market(s)

ERGP Report on the state of play of end-to-end competition and access regulation

Thank you for your attention!

Any questions?