



# *EU Regulatory Developments*

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Services*

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# Implementation

# Market Monitoring

# Green Paper

# International Dimension



## *Reminder on market opening...*

***7 Member States had opened their postal markets to competition even before the formal deadline of 1 January 2011:***

- 1. Finland (1991)*
- 2. Sweden (1993)*
- 3. Great Britain (2006)*
- 4. Germany (2008)*
- 5. Netherlands (2009)*
- 6. Estonia (2009)*
- 7. Spain (local mail liberalised)*



## ***Today excellent implementation record:***

*All 16 Member States of first group have transposed....and 11 Member States have a derogation to open their postal markets only by 31 December 2012 according to Directive 2008/6/EC:*

- 1. Greece**
- 2. Luxembourg**
- 3. Poland**
- 4. Latvia**
- 5. Lithuania**
- 6. Czech Republic**
- 7. Slovak Republic**
- 8. Hungary**
- 9. Romania**
- 10. Cyprus**
- 11. Malta**

*In green those MS that have already transposed the PSD.*



2008

2009 - 2011

**2012 - 2013**

2014 -

4<sup>th</sup> Application Report

1.Conference Brussels

2.Conference Valencia

5<sup>th</sup> Application Report

Green Paper

Application Reports

Legal Acts?

Sector Studies

Postal Users Forum

Assistance to Member States in implementation

Market monitoring and screening of legislation

ERGP

50 g

2011  
FMO  
16 MS

2013  
FMO  
11 MS

Gradual Market Opening

Internal Postal Market



# Postal statistics - institutional setup

## DG MARKT – policy development

- monitoring of the market as an essential part of the policy cycle
- outlining the main characteristics to be monitored, proposing indicators

## ERGP, NRAs – market regulation

- key role in ensuring proper functioning of the markets (single market)
- monitoring of the market to:
  - ensure fair competition on the market
  - ensure compliance of operators with legal obligations (and quality of service standards)
  - ensure provision of the Universal service

## EUROSTAT

- central role of providing high quality harmonised data, allowing comparisons across the MS



# Main issues

## USPs

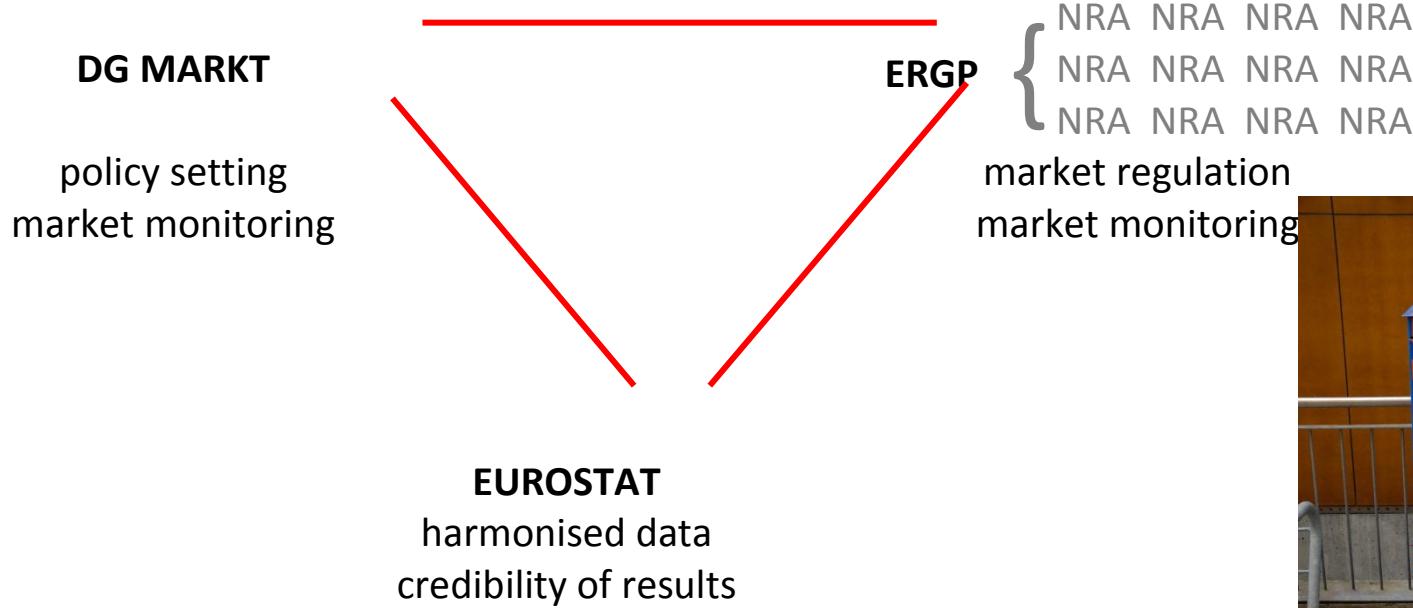
- availability of data due to confidentiality reasons
- availability of data according to the requested breakdowns

## Non-USPs

- lack of common methodology for data collection by NRAs
- limited information on target enterprise population



# Triangle of cooperation





# Future work

*Eurostat continues with established data collection*

*Future work based on*

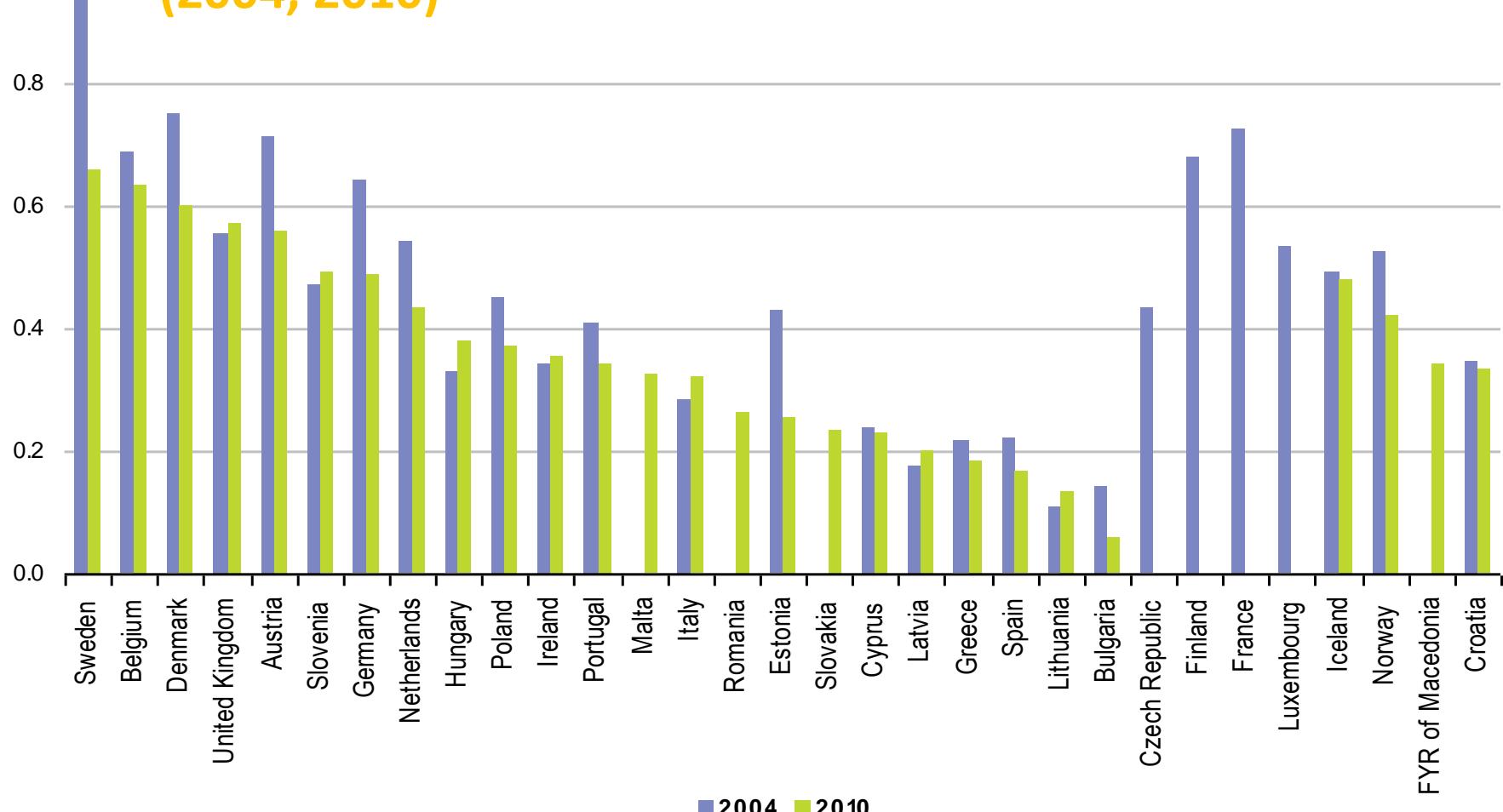
- **continuous assessment of the statistics relevance**
- **continuous improvements of the methodological framework**
- **close cooperation with ERGP and DG MARKT on methodological development**

*Regular contacts of Eurostat with DG MARKT and ERGP (NRAs) necessary to ensure*

- **relevance of the data collection**
- **methodological improvements**
- **verification of results**
- **sharing experience on data collection practice**
- **feedback on practical application of methodology**

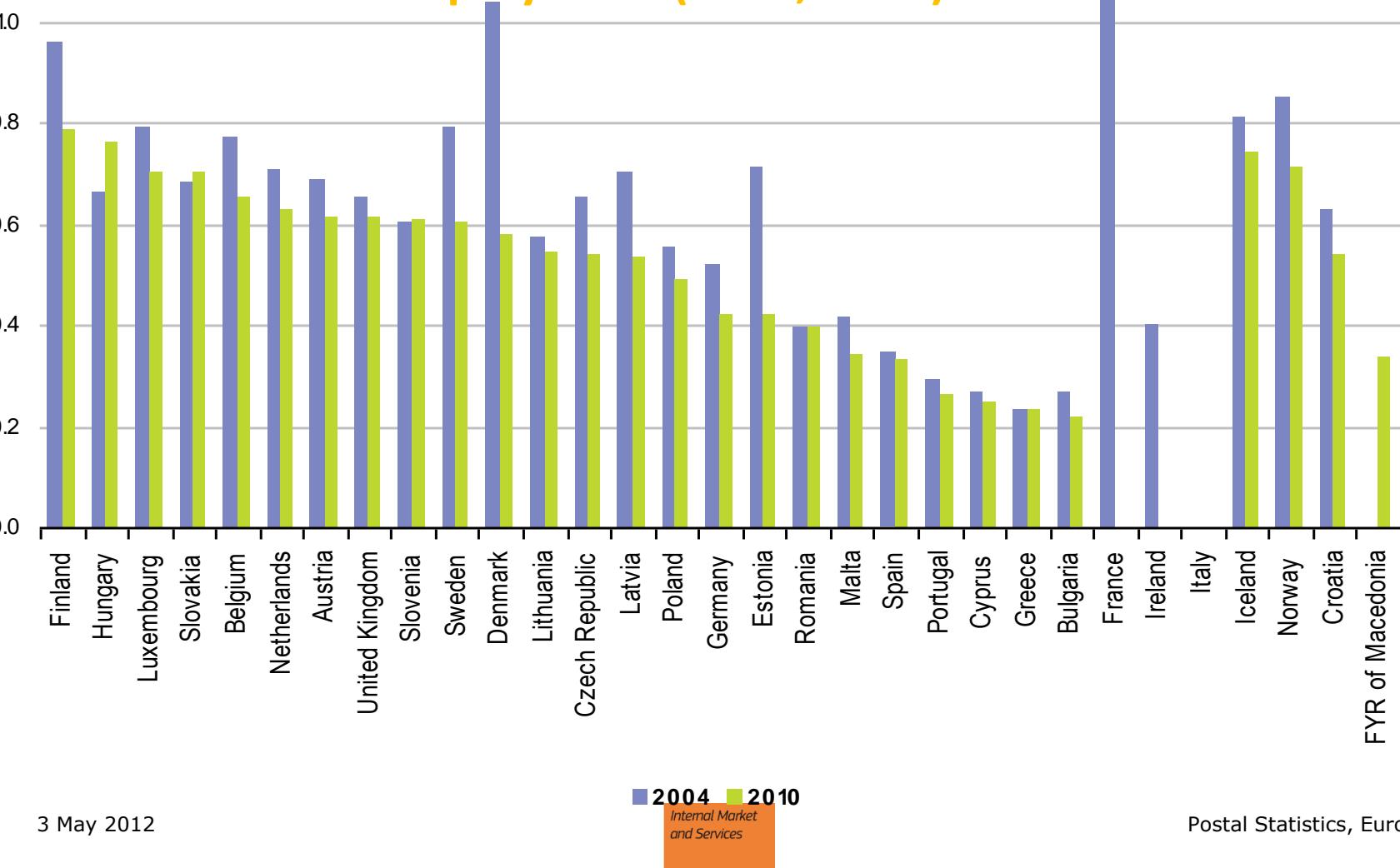


## Turnover from the domestic postal sector relative to GDP (2004, 2010)



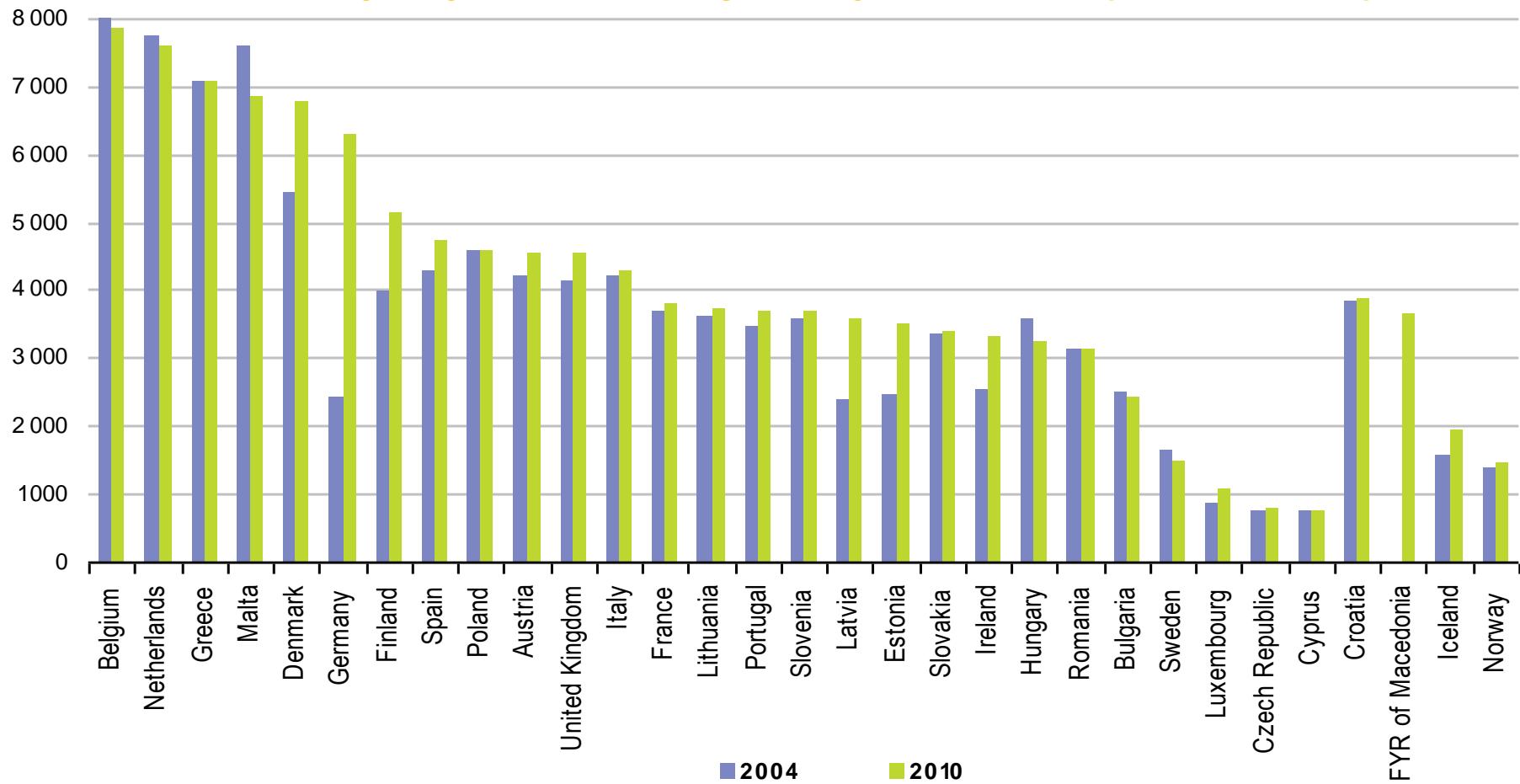


## Total number of persons employed in the postal sector as % of the total employment (2004, 2010)



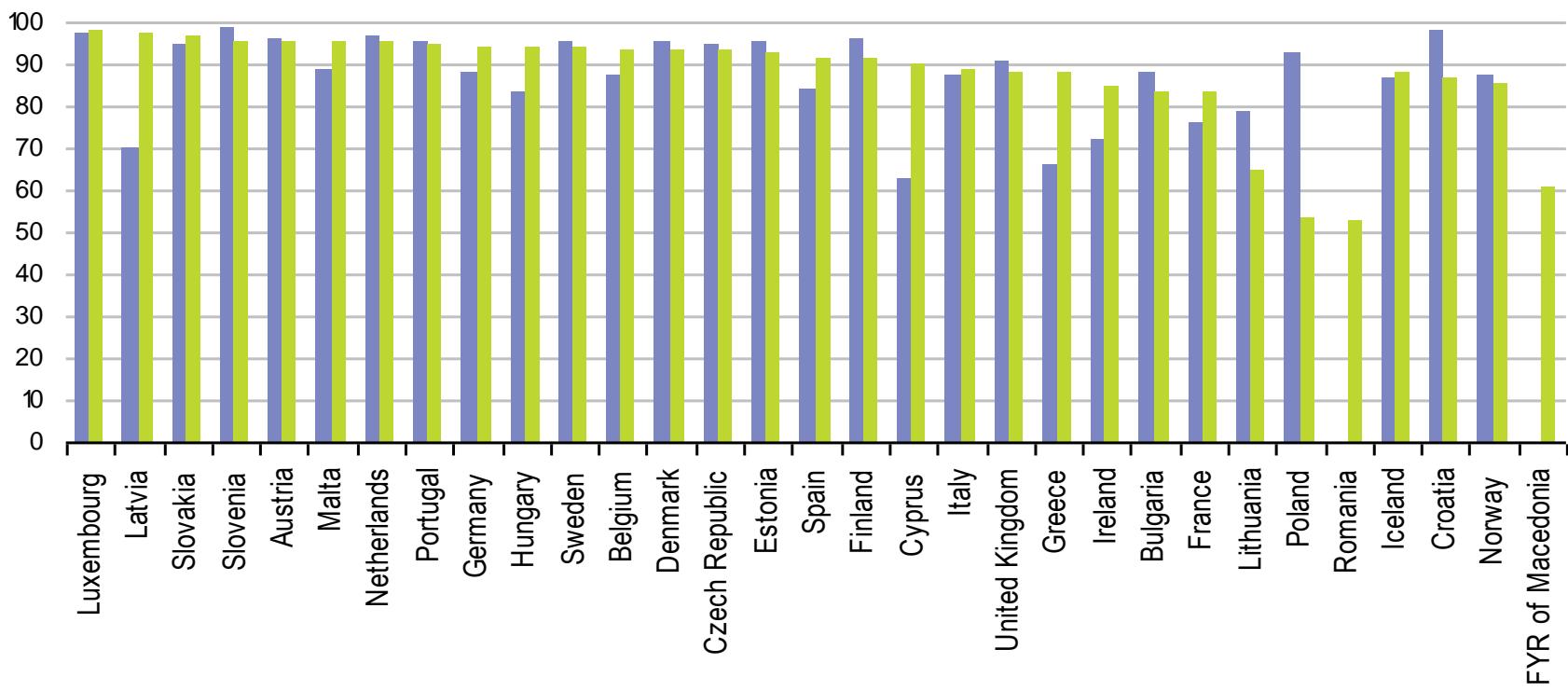


## Number of people served by one post office (2004, 2010)





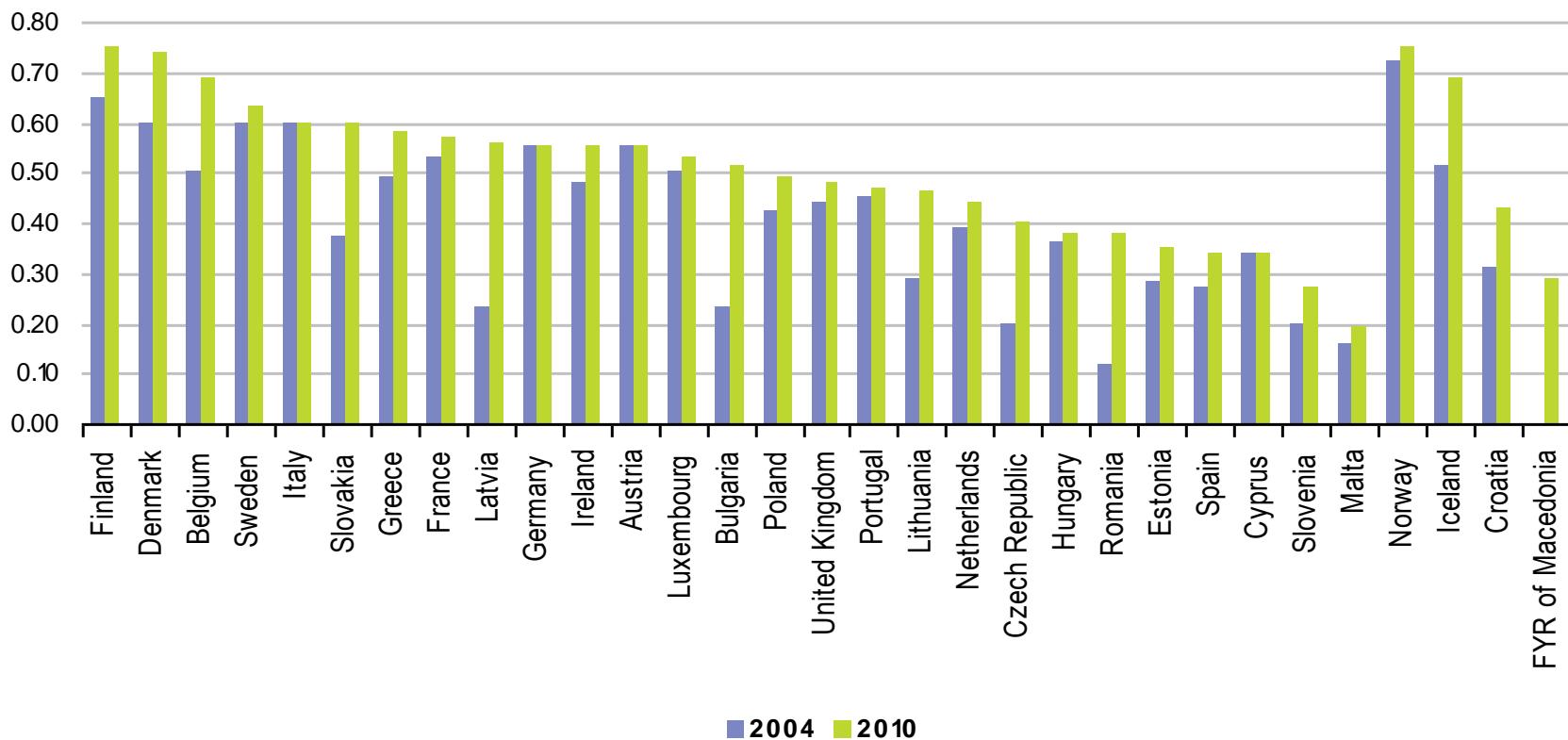
# Percentage of priority letters delivered on-time according to national performance indicators (2004, 2010)



■ 2004 ■ 2010



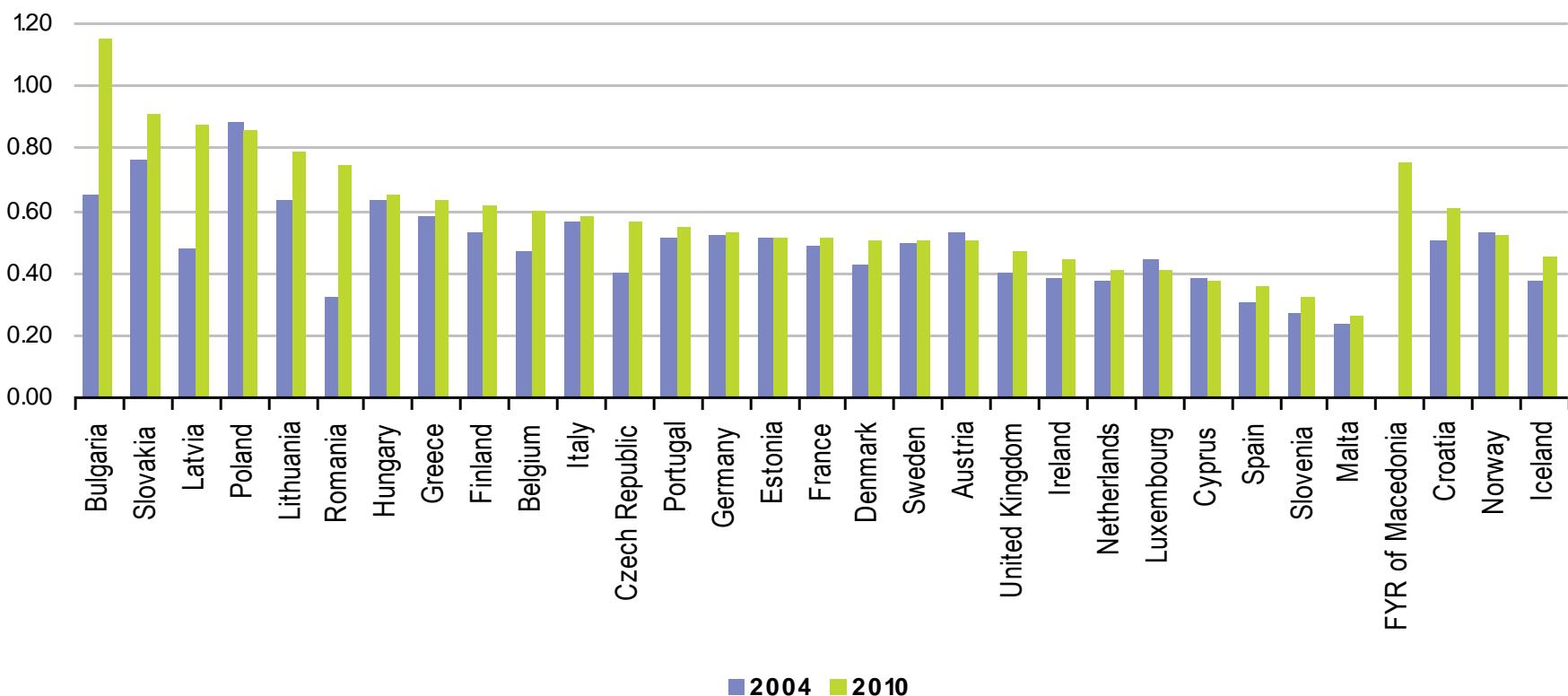
## List price (EUR) for a standard (1st class) letter for domestic services (2004, 2010)



■ 2004 ■ 2010



## List price (PPP) for a standard (1st class) letter for domestic services (2004, 2010)





# Useful links

*Eurostat's online reference database*

[http://epp.eurostat.ec.europa.eu/portal/page/portal/postal\\_services/data/database](http://epp.eurostat.ec.europa.eu/portal/page/portal/postal_services/data/database)

*Statistics Explained*

[http://epp.eurostat.ec.europa.eu/statistics\\_explained/index.php/Postal\\_service\\_statistics\\_-\\_universal\\_service\\_providers](http://epp.eurostat.ec.europa.eu/statistics_explained/index.php/Postal_service_statistics_-_universal_service_providers)



## E-commerce communication

- ✓ E-commerce ~3% of EU GDP (2010) and 3,4% of EU retail sales;
- ✓ **Missing potential:** The total gains for consumers would be € 204 bn (1,7% of EU GDP), If obstacles are eliminated and e-commerce would attain 15% of retail sales;



- ✓ Creation of a true digital single market;
- ✓ More opportunities for businesses, consumers and workers.





## E-commerce communication: Main obstacles (priorities) to the digital single market

1. *Inadequate supply of legal, cross-border online services;*
2. *Not enough information for online service operators or protection for internet users;*
3. ***Inadequate payment and delivery systems;***
4. *Difficulty in settling cases of abuse and disputes;*
5. *Insufficient use of high-speed communication networks and hi-tech solutions.*



## Delivery as one of the main priorities for e-commerce

### Main Actions:

"11. based on a *Green Paper*, initiate a consultation in 2012 on parcels delivery, in particular cross-border, drawing on the results of the study on the costs of cross border postal services, with a view to identifying *possible solutions to the problems encountered by businesses and consumers*. The Commission will present the conclusions of this exercise and the next steps by the end of 2012."

*Commission Communication to the European Parliament, the Council, the Economic and Social Committee and the Committee of the Regions, "A coherent framework to build trust in the Digital single market for e-commerce and online services", 2012 - COM(2011) 942 final*

<http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2011:0942:FIN:EN:PDF>



# Green Paper tentative timeline

2012

2013

Jan 2012

E-commerce  
communication

Nov/Dec 2012

Feb 2013

Desk research, discussions with  
stakeholder and GP preparation  
(identification of issues and possible  
solutions)

Publication  
Green Paper

Stakeholders participation  
(replies)  
Deadline (Q1 2013)



[http://ec.europa.eu/internal\\_market/post/index\\_en.htm](http://ec.europa.eu/internal_market/post/index_en.htm)