



EU Regulatory Developments

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Services***

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Limassol, Cyprus**



Implementation

Market Monitoring

Green Paper

UPU Congress

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:

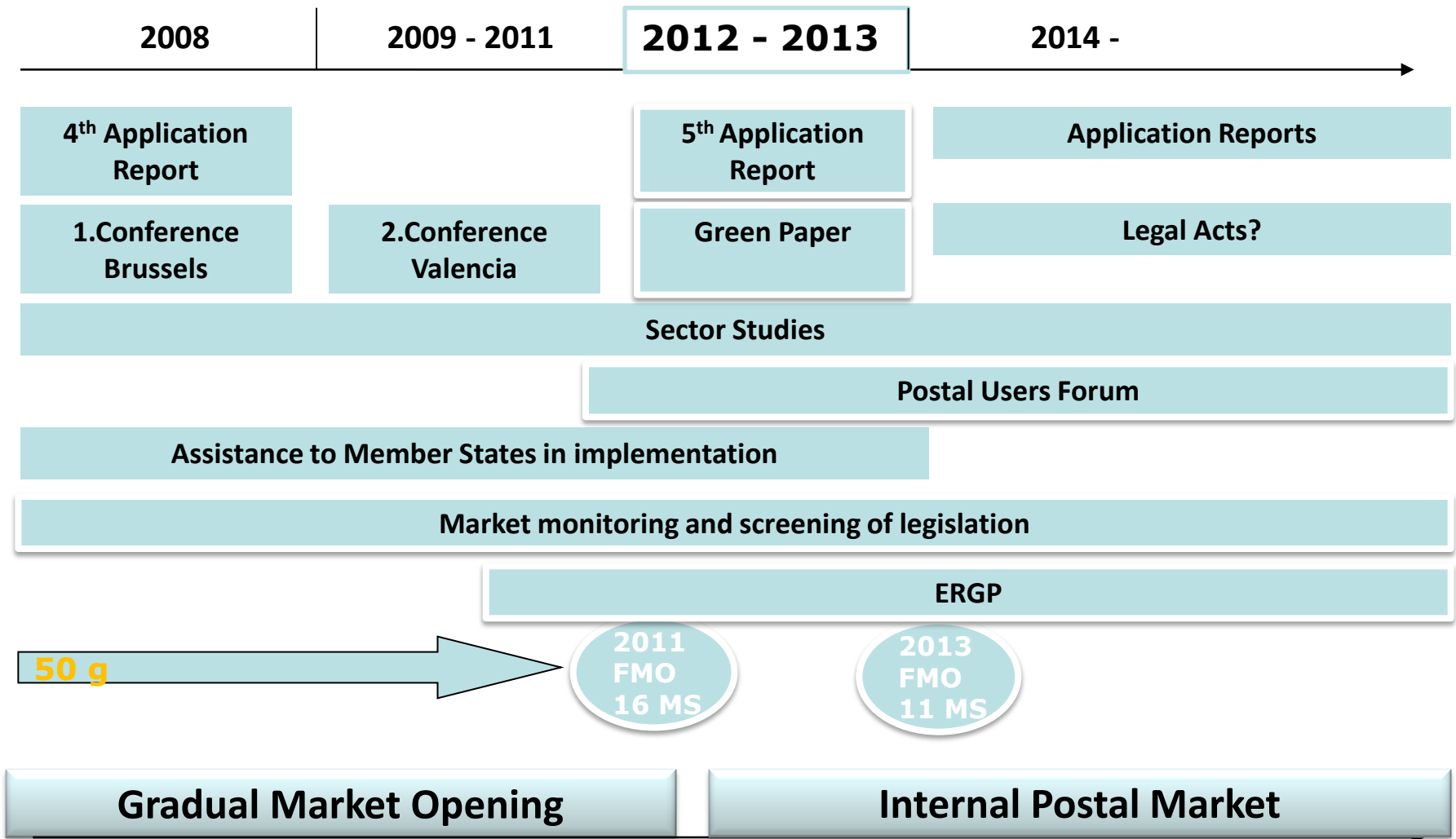
All 16 Member States of first group have transposed....and 11 Member States have a derogation to open their postal markets only by 31 December 2012 according to Directive 2008/6/EC:

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 notified the implementation.



European
Commission



Internal Market
and Services

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

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**

Useful links

Eurostat's online reference 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



Studies 2012

Study on the principles used to calculate the net costs of the postal Universal Service Obligation (Frontier Economics)

- 1. Overview of the current State of Play in the calculation of the net costs ;*
- 2. Evaluation of the "relevant elements" of the net costs of the Universal Service Obligation identified in Annex I;*
- 3. Classification and Assessment of the Applied Methodologies proposed for the calculation of the Net Cost (identification of similarities and critical differences in the approaches);*
- 4. Assessment of the link of cost accounting principles and the net cost calculation;*
- 5. Identification of the critical data needed to undertake a net cost calculation exercise.*

3rd WS 20/11/2012

Studies 2012

Study on the pricing behaviour of postal operators and its effect on postal markets

- 1. insight and understanding of postal operator's pricing behaviour in view of latest regulatory and market developments;*
- 2. overview of the regulatory tools and instruments which the competent national (regulatory and competition) authorities (NRAs/NCAs) have at their disposal, in view of the applicable legal framework;*
- 3. insight and analysis on the different factors affecting (i) postal operator's pricing behaviour and (ii) on the impact of postal operators' pricing behaviour and of the regulatory response to pricing behaviour (on the interplay of both) on postal markets and on postal users;*
- 4. identifying and analysing obstacles for sound regulatory intervention and identifying best practices with regard to legal and regulatory solutions in Member States.*

3rd WS 20/11/2012

Studies 2012/13

Study on the State of Play of the EU parcel markets with a particular emphasis on e-commerce (Copenhagen Economics)

1. Investigate the delivery aspect of the –e-commerce value chain (with an emphasis on **e-commerce driven delivery** - data gathering, mapping the various markets etc.);
2. Address the issue of interoperability of the e-commerce value chain with the various delivery channels; both in the context of properly addressing the needs of e-retailers and end-consumers.

1st WS 20/11/2012

Studies 2012/13

*Study on the main developments in the postal sector
between 2010-2013 (WIK)*

Article 23 PSD:

- ***"Every four years, on the first occasion no later than 31 December 2013, 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. [...]"***

1st WS 20/11/2012

ERGP

- Meeting of CN on 25/10/2012 expressed strong support and appreciation for the hard work of all the sub-groups;*
- Plenary meeting on 22/11/2012 in Stockholm will endorse report(s)/opinion(s) and decide on work programme 2013;*
- stakeholders informed via dedicated website.*

ERGP

- Common position on common cost allocation [ERGP CN (12) 13] - PL;*
- Report on VAT exemption – burden or benefit [ERGP CN (12) 14] – PL to decide (report/opinion);*
- Reports on: (i) end-user satisfaction and quality of service, (ii) consumer complaints, (iii) market indicators, (iv) actual data based on identified market indicators and (v) proposal for cooperation with EUROSTAT and DG MARKT [ERGP CN (12) 15 to ERGP CN (12) 19] -PL.*

ERGP

- *Report on the status quo of cross-border parcel delivery [ERGP CN (12) 20] – 2013 work;*
- *Report on access [ERGP CN (12) 21] - PL.*

2013:

- **currently existing structure of sub-groups maintained;**
- **ERGP involved in the follow-up of the Green Paper on cross-border parcel delivery;**
- **new work stream on end-to-end competition (access sub-group).**

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)

UPU – 25th Congress Doha

- adopted unanimously a resolution granting the **EU formal/de iure observer status** [proposal 74]: the EU is now a full observer to all bodies of the UPU ;
- amended the UPU convention **introducing advance electronic information as a future requirement for postal traffic** [initiative by EU MS];
- terminal dues;
- Counterfeit and pirated goods;
- **Europe is "the motor of the UPU"** – sound preparation essential – follow-up required.



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http://ec.europa.eu/internal_market/post/index_en.htm