

Postal Services in Europe

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INDUSTRY, TRADE AND SERVICES

12/2007

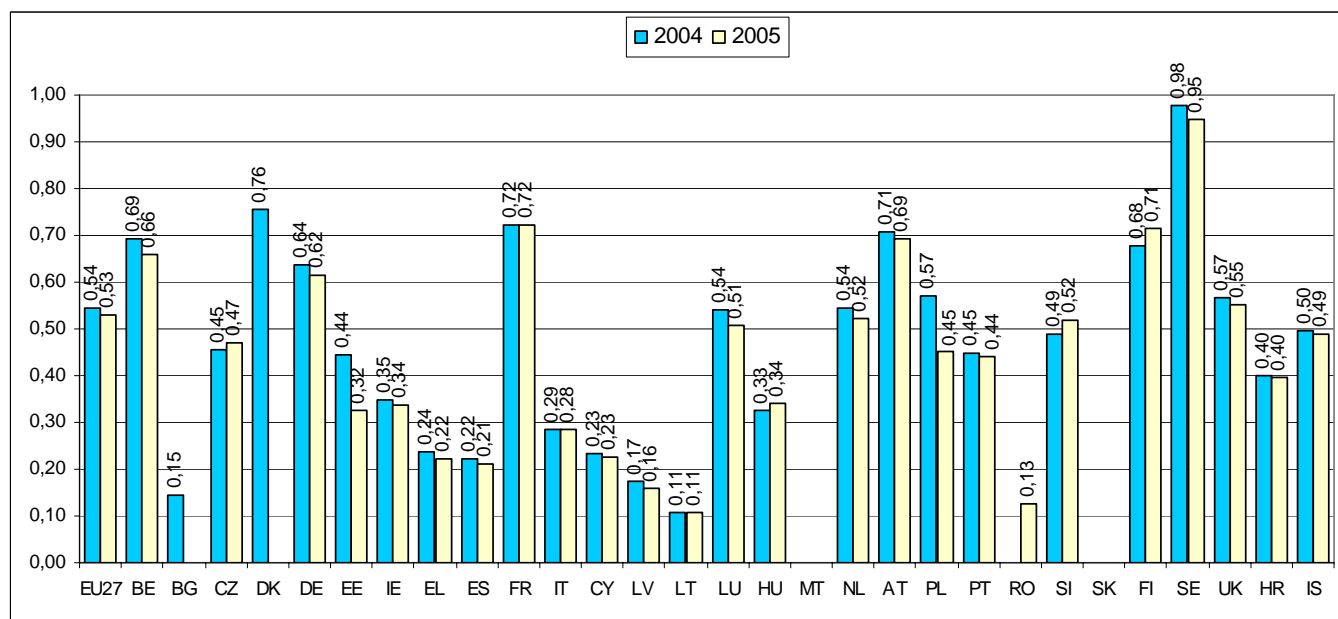
POPULATION AND SOCIAL CONDITIONS

SCIENCE AND TECHNOLOGY

Data on the Universal Service Providers (USPs)

Turnover

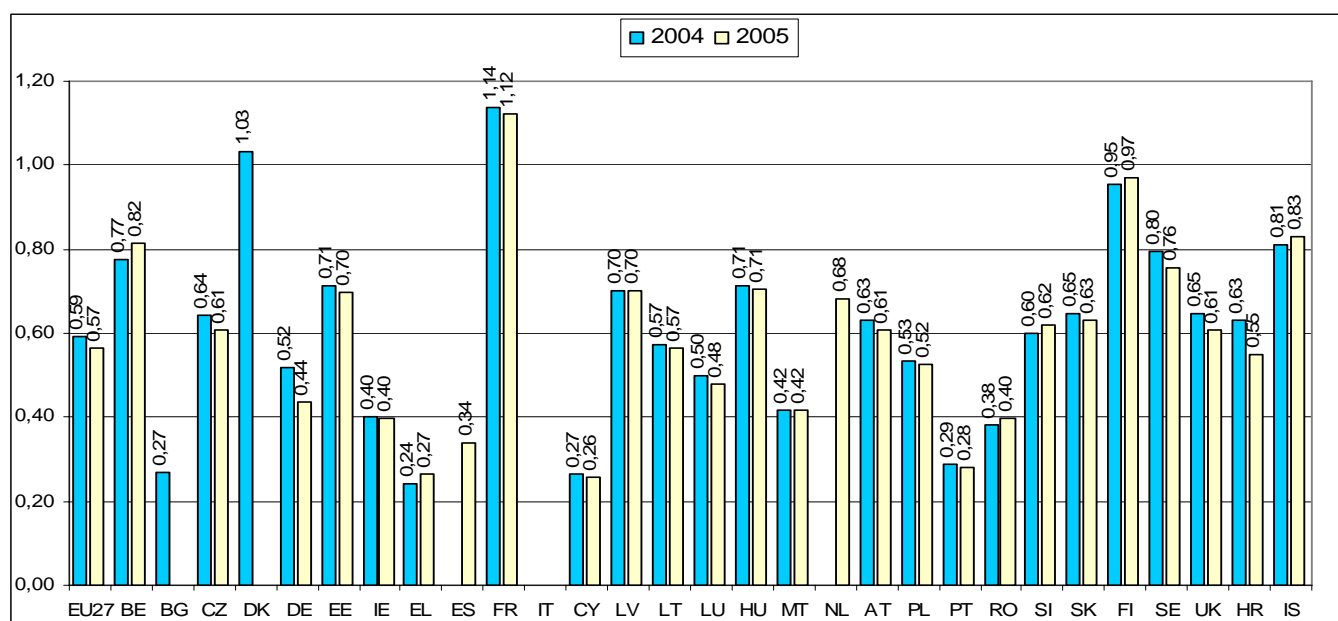
Figure 1: Total turnover from the domestic postal sector as % of GDP (2004, 2005)



Source: Turnover: Eurostat, Inquiry on Postal Services 2006, GDP: Eurostat, National accounts - ESA
Notes: The turnover refers to the total turnover from the provision of postal and related services domestically (FIN 303). Turnover data for MT and SK are confidential. Figures of these countries are integrated into the calculation of the EU-27 aggregate. Data for BG (2005), DK (2005) and RO (2004) are not available. Variations between the two years can be explained by an increase or decrease in the turnover and/or the GDP of the countries. For more detailed information, see "Methodological notes" at the end of the document.

Employment

Figure 2: Total number of persons employed in the domestic postal sector as % of total employment (2004, 2005)



Source: Employment in the postal sector: Eurostat, Inquiry on Postal Services 2006. Total employment: Eurostat, Annual employment averages, domestic concept – ESA, except for IS – resident concept.

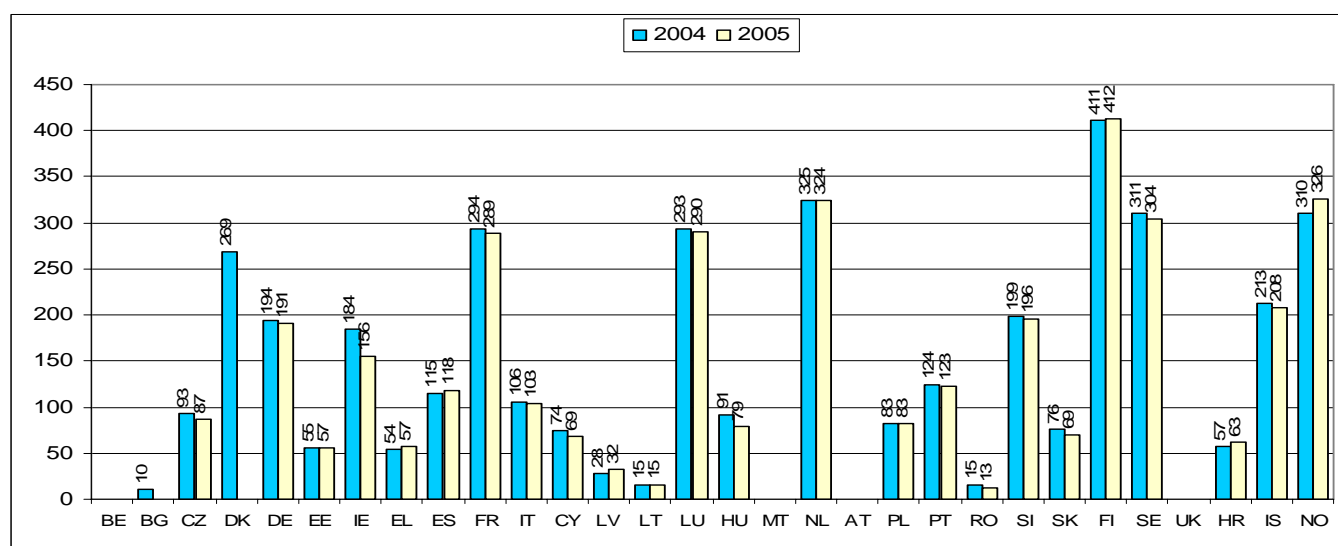
Notes: Employment in the postal sector refers to the total number of persons employed for the provision of postal and related services domestically (EMPL 106).

Data on domestic employment in the postal sector are not available for BG (2005), DK (2005), ES (2004), IT (2005) and NL (2004). Data for IT (2004) are confidential.

For more detailed information, see "Methodological notes" at the end of the document.

Letter Post items

Figure 3: Number of letter post items per capita (2004, 2005)



Source: Eurostat, Inquiry on Postal Services 2006.

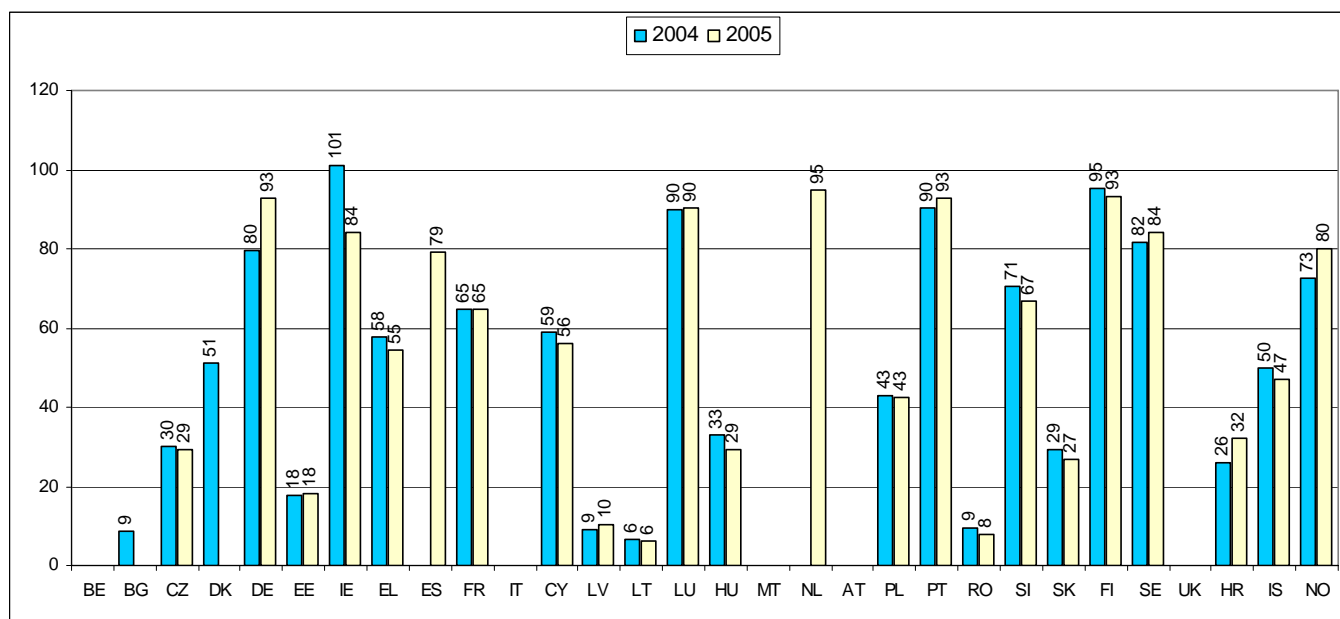
Notes: The indicator refers to the total letter-post services (ITM 402). Letters post services include ordinary letters and postcards, direct mail, registered mail, insured mail and other letter-post items.

Population data: National population, population by sex and age on 1st of January 2005 and 2006, Eurostat.

Data on letter-post items for BE, BG (2005), DK (2005) and AT are not available. Data for MT and UK are confidential.

For more detailed information, see "Methodological notes" at the end of the document.

Figure 4: Number of letter post items (in 1000) distributed per employee (2004, 2005)



Source:

Eurostat, Inquiry on Postal Services 2006.

Notes:

The indicator refers to the total letter-post services (ITM 402) in relation to the domestic employment (EMPL 106).

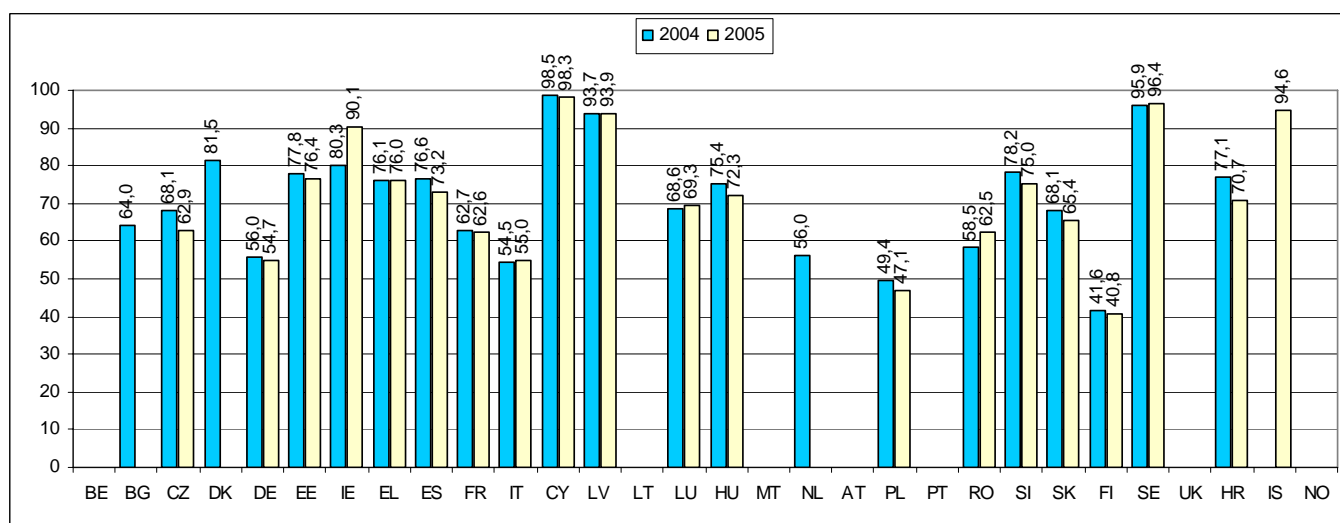
Data on domestic employment for BG (2005), DK (2005), ES (2004), IT (2005), NL (2004) are not available. Data for IT (2004) are confidential.

Data on letter-post items, total are not available for BE, BG (2005), DK (2005) and AT. Data for MT and UK are confidential.

For more detailed information, see "Methodological notes" at the end of the document

Letter volumes

Figure 5: Ordinary letters and postcards as % of total letter post services (2004, 2005)



Source:

Eurostat, Inquiry on Postal Services 2006.

Notes:

Ordinary letters and postcards (LET 409) are shown in relation to the total letter-post services (ITM 402).

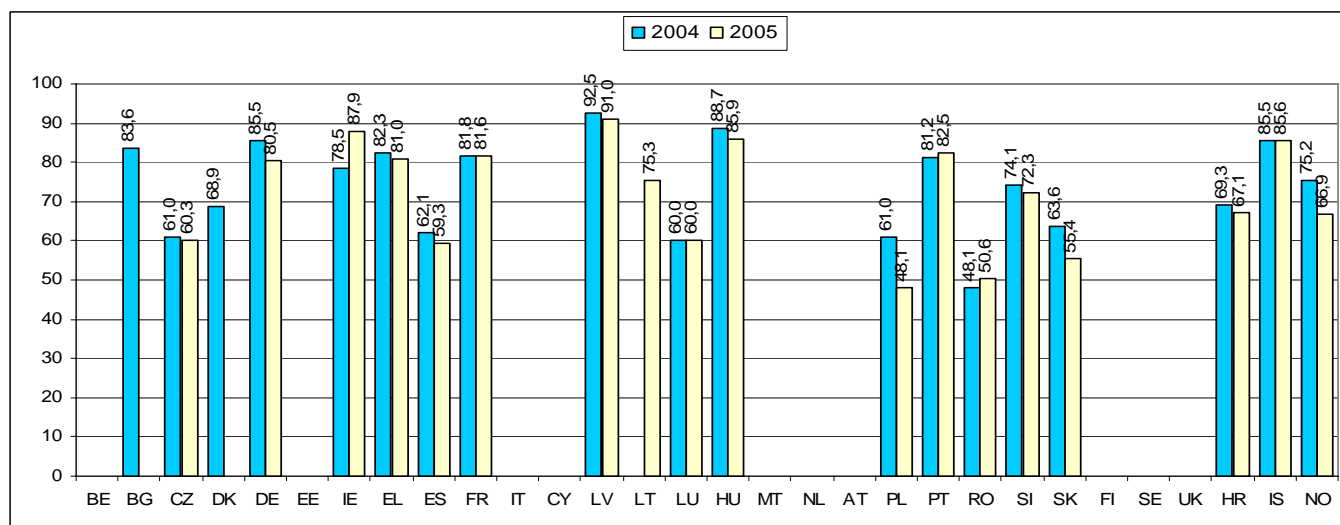
ITM 402: Data for BE, BG (2005), DK (2005) and AT are not available. Data for MT and UK are confidential.

LET 409: Data for BE, BG (2005), DK (2005), LT, NL (2005), AT (2004), IS (2004) and NO (2004) are not available. Data for MT, PT, UK and NO (2005) are confidential.

For more detailed information, see "Methodological notes" at the end of the document

Reserved area

Figure 6: Reserved area as % of total letter post services (2004, 2005)



Source: Eurostat, Inquiry on Postal Services 2006.

Notes: The indicator refers to the reserved area (ITM 403) in relation to total letter-post services (ITM 402).

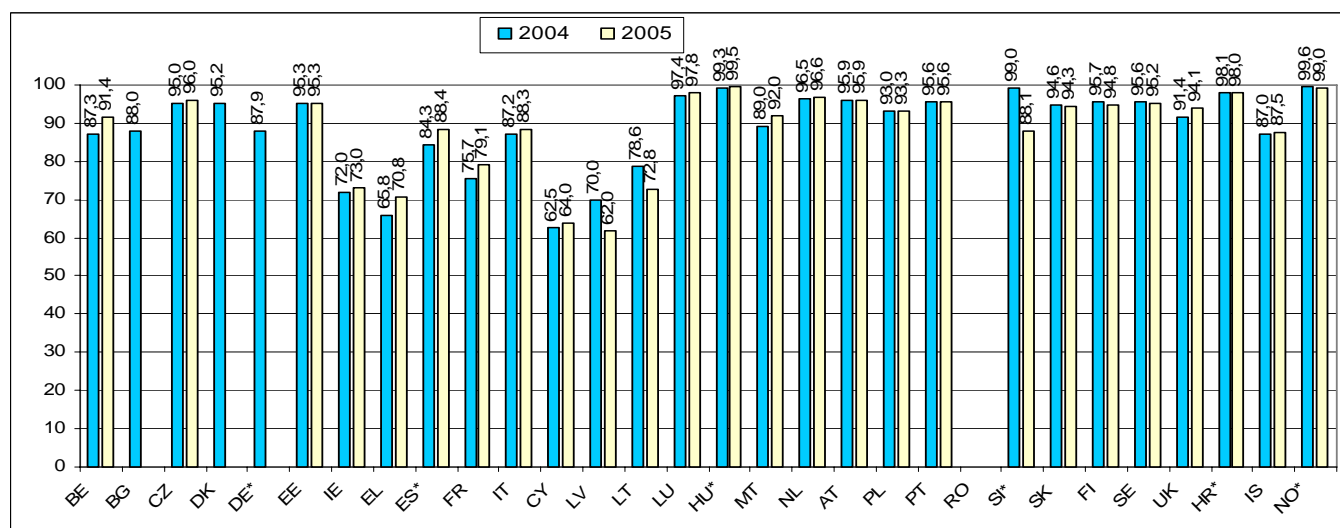
ITM 403: No data available for BE, BG (2005), DK (2005), EE, IT, CY, LT (2004), NL, AT, FI, SE and UK. Data for MT are confidential. Some of these countries have no reserved area.

ITM 402: Data for BE, BG (2005), DK (2005) and AT are not available. Data for MT and UK are confidential.

For more detailed information, see "Methodological notes" at the end of the document.

Quality standards

Figure 7: % of priority letters delivered on-time according to national performance indicators (2004, 2005)



Source: Eurostat, Inquiry on Postal Services 2006.

Notes: The indicator refers to % of priority letters delivered on-time according to national performance indicators (DOM 501). The standard measured is D+1, except for SI (2004), where it is D+2, for ES, HR and NO, where it is D+3 and for HU, where it is D+15.

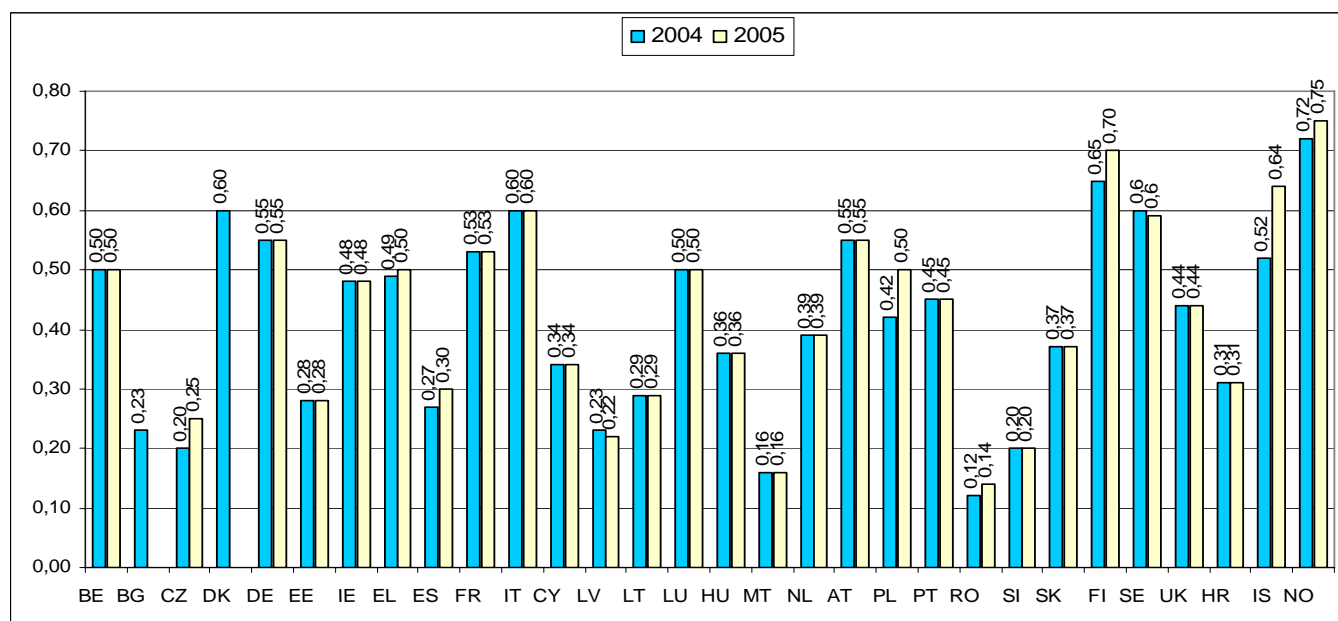
In 2005, the NRA in Germany stopped his own measurement. The new figures for 2005 (D+1>80%) show, that the requirements according to the German Postal Universal Service Ordinance are fulfilled.

No data available for BG (2005), DK (2005) and RO.

For more detailed information, see "Methodological notes" at the end of the document

Price for a standard letter

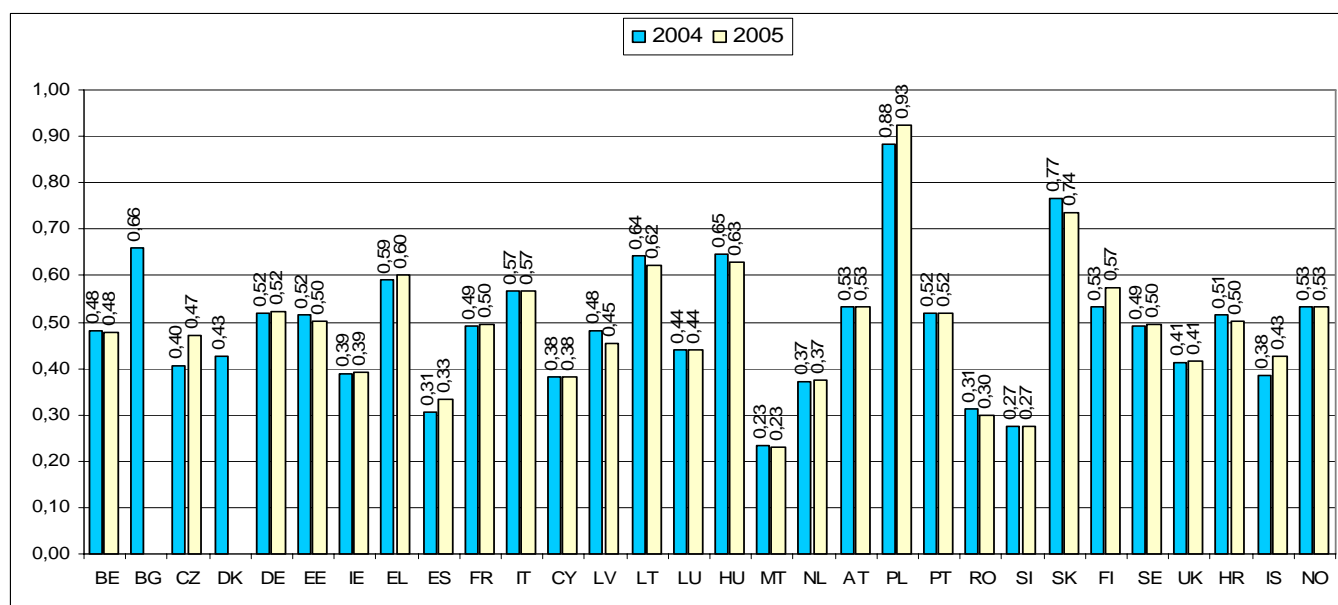
Figure 8: List price (EUR) for a standard (1st class) letter weighing less than 20 g (universal service) for domestic services (2004, 2005)



Source: Eurostat, Inquiry on Postal Services 2006.

Notes: The indicator refers to the domestic list price payable for the handling of a standard (1st class) letter weighing less than 20 g (universal service), (PRI 601). No data available for BG (2005) and DK (2005). Exchange rates used for currency conversions of the countries (BG, DK, CZ, EE, CY, LT, LV, HU, MT, PL, RO, SI, SK, SE, UK, HR, IS, NO) not using the EURO as national currency, are the annual averages of 2004, respectively 2005, Eurostat: Bilateral exchange rates, annual data
For more detailed information, see "Methodological notes" at the end of the document

Figure 9: Price for a standard (1st class) letter weighing less than 20 g (universal service) for domestic services (2004, 2005) in Purchasing Power Parities (PPP)



Source: Eurostat, Inquiry on Postal Services 2006 and Eurostat, Purchasing Power Parities.

Notes: No data available for BG (2005) and DK (2005).
For more detailed information, see "Methodological notes" at the end of the document.

Data on the Universal Service Providers (USPs)

Table 1: Selected indicators of the European postal market in 2004 and 2005

| | Domestic Turnover (Mio. EUR) | | Domestic Employment (total number) | | Letter-post services (1000) | | Ordinary letters and postcards (1000) | | List Price standard letter (EUR) | | Reserved area (1000) | | On-time delivery (D+1)* (%) | |
|--------------|---------------------------------|----------------|---------------------------------------|----------------|--------------------------------|------------|---|----------------|-------------------------------------|------|-------------------------|------------|--------------------------------|--------|
| | 2004 | 2005 | 2004 | 2005 | 2004 | 2005 | 2004 | 2005 | 2004 | 2005 | 2004 | 2005 | 2004 | 2005 |
| EU-27 | <i>57370.0</i> | <i>57884.4</i> | <i>1259913</i> | <i>1217282</i> | | | | | | | | | | |
| BE | 2 000.5 | 1 973.3 | 32 311 | 34 360 | na | na | na | na | 0.50 | 0.50 | na | na | 87.3 | 91.4 |
| BG | 28.9 | na | 9 134 | na | 80 798 | na | 51 742 | na | 0.23 | na | 67 552 | na | 88.0 | na |
| CZ | 396.4 | 468.1 | 31 681 | 30 451 | 952 990 | 887 363 | <i>649 358</i> | <i>558 546</i> | 0.20 | 0.25 | 580 939 | 535 136 | 95.0 | 96.0 |
| DK | 1 482.0 | na | 28 349 | na | 1 454 053 | na | 1 185 700 | na | 0.60 | na | 1 001 600 | na | 95.2 | na |
| DE | 14 076.0 | 13 786.0 | 201 541 | <i>170 000</i> | 16 038 000 | 15 760 000 | 8 974 000 | 8 614 000 | 0.55 | 0.55 | 13 705 000 | 12 680 000 | 87.9 | >80.0* |
| EE | 41.6 | 35.9 | 4 222 | 4 222 | 74 338 | 76 004 | 57 802 | 58 067 | 0.28 | 0.28 | na | na | 95.3 | 95.3 |
| IE | 515.0 | 544.0 | 7 502 | 7 800 | 757 000 | 655 000 | 607 500 | 590 000 | 0.48 | 0.48 | 594 000 | 576 000 | 72.0 | 73.0 |
| EL | 401.8 | 403.3 | 10 412 | 11 617 | 600 988 | 633 793 | 457 496 | 481 919 | 0.49 | 0.50 | 494 556 | 513 674 | 65.8 | 70.8 |
| ES | 1 854.7 | 1 920.8 | na | 64 905 | 4 964 692 | 5 150 875 | 3 802 210 | 3 770 894 | 0.27 | 0.30 | 3 082 447 | 3 053 779 | 84.3 | 88.4* |
| FR | 11 998.0 | 12 429.0 | 283 945 | 281 450 | 18 357 000 | 18 199 000 | 11 514 000 | 11 390 000 | 0.53 | 0.53 | 15 007 000 | 14 847 000 | 75.7 | 79.1 |
| IT | 3 973.0 | 4 047.0 | c | 6 213 124 | 6 080 648 | 6 080 648 | 3 384 242 | 3 347 385 | 0.60 | 0.60 | na | na | 87.2 | 88.3 |
| CY | 29.7 | 30.9 | 942 | 944 | 55 462 | 52 805 | 54 636 | 51 927 | 0.34 | 0.34 | na | na | 62.5 | 64.0 |
| LV | 19.5 | 20.8 | 7 080 | 7 159 | 64 006 | 74 285 | 59 972 | 69 733 | 0.23 | 0.23 | 59 195 | 67 627 | 70.0 | 62.0 |
| LT | 19.4 | 22.5 | 8 164 | 8 260 | 52 854 | 52 706 | na | na | 0.29 | 0.29 | na | 39 686 | 78.6 | 72.8 |
| LU | 146.0 | 149.0 | 1 485 | 1 475 | 133 300 | 133 300 | 91 390 | 92 412 | 0.50 | 0.50 | 80 000 | 80 000 | 97.4 | 97.8 |
| HU | 268.6 | 302.6 | 27 713 | 27 377 | 918 303 | 789 611 | 692 184 | 577 434 | 0.36 | 0.36 | 814 695 | 686 103 | 99.3* | 99.5* |
| MT | c | c | 625 | 635 | c | c | c | c | 0.16 | 0.16 | c | c | 89.0 | 92.0 |
| NL | 2 660.0 | 2 647.0 | na | 56 000 | 5 300 000 | 5 300 000 | 2 970 000 | na | 0.39 | 0.39 | na | na | 96.5 | 96.6 |
| AT | 1 668.0 | 1 702.0 | 26 058 | 25 192 | na | na | na | 994 466 | 0.55 | 0.55 | na | na | 95.9 | 95.9 |
| PL | 1 161.0 | 1 105.3 | 73 784 | 74 036 | 3 165 683 | 3 158 775 | 1 563 162 | 1 486 630 | 0.42 | 0.50 | 1 930 460 | 1 520 370 | 93.0 | 93.3 |
| PT | 648.0 | 655.4 | 14 378 | 14 012 | 1 300 654 | 1 301 058 | c | c | 0.45 | 0.45 | 1 055 694 | 1 073 363 | 95.6 | 95.6 |
| RO | na | 100.1 | 34 756 | 36 281 | 324 741 | 282 391 | 189 973 | 176 429 | 0.12 | 0.14 | 156 321 | 142 771 | na | na |
| SI | 128.0 | 143.3 | 5 645 | 5 887 | 398 129 | 392 800 | 311 413 | 294 690 | 0.20 | 0.20 | 295 063 | 283 890 | 99.0* | 88.1 |
| SK | c | c | 13 990 | 13 991 | 407 028 | 374 433 | 277 118 | 244 992 | 0.37 | 0.37 | 258 982 | 207 268 | 94.6 | 94.3 |
| FI | 1 035.0 | 1 123.0 | 22 570 | 23 252 | 2 150 400 | 2 166 000 | 893 820 | 883 000 | 0.65 | 0.70 | na | na | 95.7 | 94.8 |
| SE | 2 753.0 | 2 723.2 | 34 299 | 32 684 | 2 803 311 | 2 754 287 | 2 687 574 | 2 655 630 | 0.60 | 0.60 | na | na | 95.6 | 95.2 |
| UK | 9 837.0 | 9 899.0 | 184 299 | 174 202 | c | c | c | c | 0.44 | 0.44 | na | na | 91.4 | 94.1 |
| HR | 114.3 | 124.0 | 9 838 | 8 671 | 254 959 | 278 414 | 196 512 | 196 809 | 0.31 | 0.31 | 176 707 | 186 872 | 98.1* | 98.0* |
| IS | 52.7 | 63.6 | 1 257 | 1 329 | 62 514 | 62 462 | na | 59 073 | 0.52 | 0.64 | 53 440 | 53 497 | 87.0 | 87.5 |
| NO | 1 104.0 | 1 151.4 | 19 650 | 18 905 | 1 427 000 | 1 510 774 | na | c | 0.72 | 0.75 | 1 073 608 | 1 010 582 | 99.6* | 99.0* |

Source: Eurostat, Inquiry on Postal Services 2006.

Notes: On-time delivery: The indicator refers to % of priority letters delivered on-time according to national performance indicators (DOM 501). The standard measured is D+1, except for SI (2004), where it is D+2, for ES, HR and NO, where it is D+3 and for HU, where it is D+15.

The figure for DE (2005) is to be read as >80.0 %: In 2005, the NRA in Germany stopped their own measurement. The new figures for 2005 show, that the requirements according to the German Postal Universal Service Ordinance are fulfilled (D+1 > 80.0 %). For more detailed information on the indicators, see "Methodological Notes" at the end of the document.

Figures in *italic* are estimated, c = confidential.

COMMENTS

After a break of three years, Eurostat has started again collecting data on postal services in 2005. The National Regulatory Authorities (NRAs) are Eurostat's partners in the data collection and the reference years are 2004 and 2005. This *Data in Focus* (DIF) is the second publication based on some selected variables of the most recent data set, collected in autumn 2006.

The data collection covered the companies operating under the Universal Service obligation (Universal Service Providers, USP) as well as other service providers. "Universal service" refers here to the set of general interest demands to which services such as the mail should be subject throughout the Community. The aim is to ensure that all users have access to quality services at an affordable price.

For the current publication, only data on the USP have been used. Activities other than postal services (for instance financial services) of the USP are excluded. The USPs are here defined as public or private entities providing a universal service or parts thereof within a Member State whether required by license, authorisations or other legal instruments.

The postal services are undergoing a market liberalisation, which is progressing at different phases in different Member States. This should be taken into consideration while making comparisons between countries, as in the process some of the services are privatised in some of the countries and not in others.

METHODOLOGICAL NOTES

Country codes:

| | | | | |
|--------------------|------------------|-----------------|--------------|--------------------|
| BE: Belgium | IE: Eire/Ireland | LV: Latvia | AT: Austria | FI: Finland |
| BG: Bulgaria | EL: Greece | LT: Lithuania | PL: Poland | SE: Sweden |
| CZ: Czech Republic | ES: Spain | LU: Luxembourg | PT: Portugal | UK: United Kingdom |
| DK: Denmark | FR: France | HU: Hungary | RO: Romania | HR: Croatia |
| DE: Germany | IT: Italy | MT: Malta | SI: Slovenia | IS: Island |
| EE: Estonia | CY: Cyprus | NL: Netherlands | SK: Slovakia | NO: Norway |

Data source:

All variables used were collected in the context of the "Eurostat Inquiry on Postal Services", on the basis of annual questionnaires sent to the National Regulatory Authorities in the participating countries.

Definitions of the variables used:

Turnover - Total turnover from the provision of postal and related services domestically (FIN 303):

Domestic turnover refers to turnover from postal activities within the economic territory of the country of reference. Receipts from foreign operators for services within the reference country should be included.

Turnover is defined here as comprising the totals invoiced by the observation unit during the reference period, and this corresponds to market sales of services supplied to third parties.

Turnover includes all duties and taxes on the services invoiced by the unit with the exception of the VAT invoiced by the unit vis-à-vis its customer and other similar deductible taxes directly linked to turnover. It also includes all other charges (transport, packaging, etc.) passed on to the customer, even if these charges are listed separately in the invoice. Reduction in prices, rebates and discounts as well as the value of returned packing are deducted.

Income classified as other operating income, financial income and extra-ordinary income in company accounts is excluded from turnover. Operating subsidies received from public authorities or the institutions of the European Union are also excluded.

Employment – Total number of persons employed for the provision of postal and related services domestically (EMPL 106)

Domestic employment refers to persons employed in postal services within the economic territory of the country of reference. It also includes part-time workers, who are regarded as such under the laws of the country concerned and who are on the pay-roll, as well as seasonal workers, apprentices and home workers on the pay-roll. It is measured as an average over the reference year. Presenting the number of persons employed as a share of total employment of the National Accounts is not ideal, as the latter is in Full-Time Equivalents, but is nevertheless presented as an acceptable proxy.

Letter post services (ITM 402)

Letter-post services consist of items of correspondence (ordinary letters and postcards, direct mail, registered mail, insured mail) and other letter-post items (books, catalogues, newspapers and periodicals). These items are to be conveyed and delivered at the address indicated by the sender on the item itself or on its wrapping.

Reserved area (ITM 403)

Reserved area refers to the standard letter-post service, where USPs enjoy exclusive rights to provide services. The reserved area is delineated at country level within weight/price limits given by the EC postal directives (97/67/EC and 2002/39/EC). Country definitions for the reserved area vary, so direct comparisons between countries should be made with prudence. In this publication it is expressed in terms of numbers of letters and in percentage of the total letter post services.

On-time delivery of priority letters according to national performance indicators (DOM 501)

"Quality standards" for national mail in each Member State have been established by Member States in relation to the time limit for routing measured from end to end for postal items of the fastest standard category according to the formula $D + n$, where D represents the date of deposit and n the number of working days, which elapse between the date and that of delivery to the addressee.

The traditional indicator of the quality of postal service is the percentage of letters delivered on time according to the national performance standards, stipulated by the NRAs. The basic quality indicator adopted here is $D+1$ (delivery of letter 1 working day after posting it).

Prices – List price (EUR) payable for the handling of a standard (first class) letter weighting less than 20 g (universal service) for domestic service (PRI 601)

Prices of letters vary significantly between EU Member States according to various criteria. For reasons of comparability, the price of a 1st class letter weighing 20 g is being requested for domestic service. Prices should be indicated for 1 July of the reference year (2004/2005).

The prices are compared in two ways, in direct Euro terms and taking into account the purchasing power of each country. The Purchasing Power Parities of consumption have been used to adjust the direct prices to the purchasing power in the country. The adjustment changes the price comparison significantly.

FURTHER INFORMATION

European Statistical Data Support

Contact details for this support network can be found on the Eurostat Internet site:
<http://ec.europa.eu/eurostat> → Services: Help/Data support